



**COUNCIL** *for a*  
**SECURE AMERICA**

# Peace through Strength The Trans-Alaska Pipeline

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**HOW GEOPOLITICAL CRISIS  
RESHAPED U.S. ENERGY SECURITY**

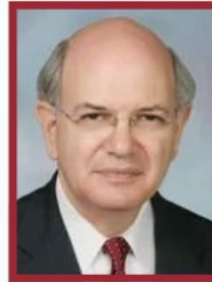
*A Briefing for Alaska State Legislators*

March 11, 2026 • Davis 106 • Sponsored by Representative McCabe



# CSA: From Energy Security to Strategic Leadership

- Founded in the 1980s to strengthen U.S. energy security
- Revitalized in 2012 to link domestic energy strength with global leadership
- Bridges industry, policymakers, and national security leaders
- Positions prosperity as an instrument of stability and deterrence
- Advances energy security as a foundation of geopolitical leverage



Martin Frost  
Former Member of Congress (D-TX)



Harold Hamm  
Chairman Continental Resources



Malcolm Hoenlein  
Vice Chairman, Conference of Presidents of Major American Jewish Organizations

# Setting the Table: Then and Now

## THEN (1973)

- Arab oil embargo triggered by the Yom Kippur War
- Oil prices quadrupled overnight (~\$2.90 → ~\$11.65/barrel)
- U.S. imported ~35% of its petroleum — completely vulnerable
- Gas lines, inflation, recession hit American families directly
- Congress responded with the Trans-Alaska Pipeline Authorization Act

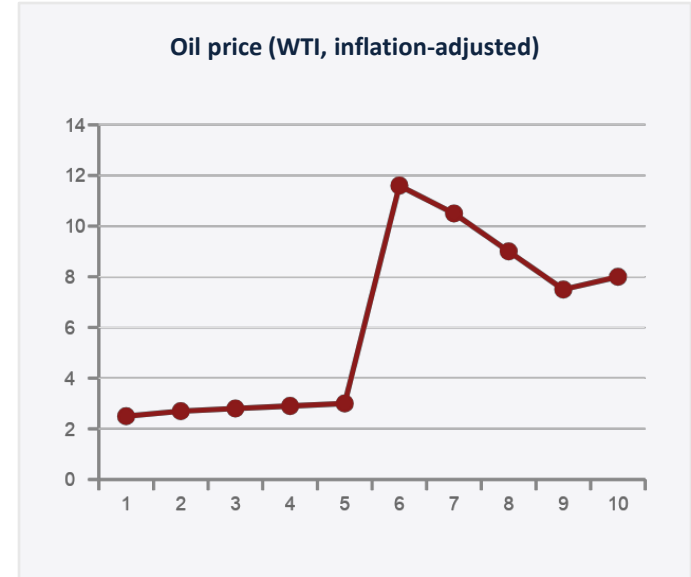
## NOW (2024-2026)

- Iran launching 500+ ballistic missiles at U.S. allies and Abraham Accords partners
- Iran attacking nearly every OPEC nation — UAE, Kuwait, Saudi Arabia, Qatar, Bahrain
- U.S. is now the world's leading energy producer — acting from strength, not vulnerability
- Domestic energy dominance — including Alaska's — is what made that possible

**In 1973, a Middle East crisis exposed America's weakness. In 2026, America's energy strength is the reason we can act.**

# Energy Shock and Strategic Infrastructure

- October 1973 oil embargo exposed U.S. import vulnerability
- Oil prices rose from ~\$2.90 to ~\$11.65 per barrel
- U.S. petroleum imports doubled between 1965 and 1973
- Congress accelerated domestic energy infrastructure
- The Trans-Alaska Pipeline became the central structural response



# Strategic Vulnerability Exposed

- By 1973, imports supplied ~35% of U.S. petroleum consumption
- Supply disruptions triggered inflation and recessionary pressure
- Fuel shortages disrupted transportation and industry
- Energy formally integrated into national security planning

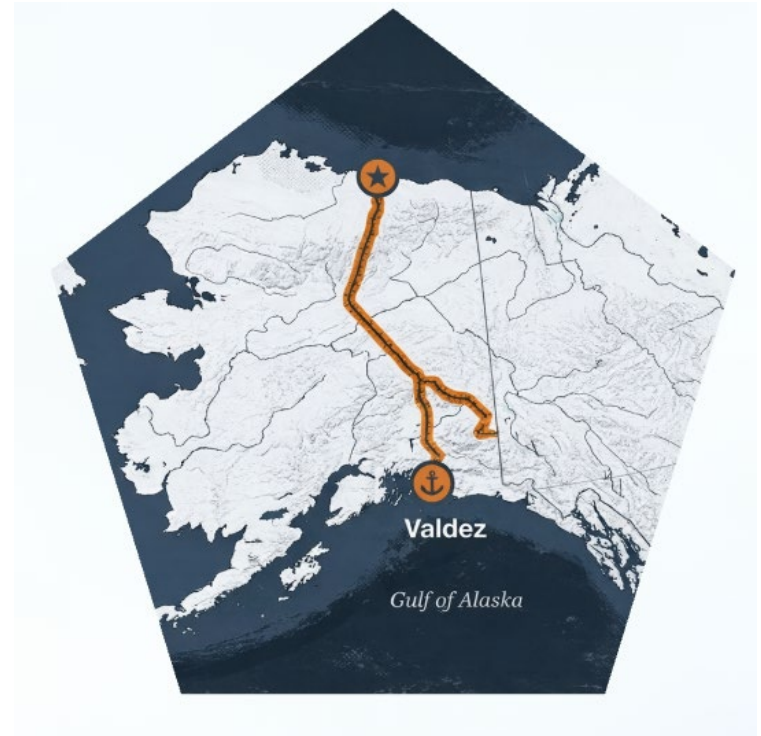


Leon Mill spray paints a sign outside his Phillips 66 station in Perkaskie, Pa., on June 1, 1973, to let his customers know he's out of gas. An oil crisis was the culprit, squeezing U.S. businesses and consumers who were forced to line up at gas stations for hours.

STATION IN PERKASKIE, Pa., JUNE 1, 1973

# The Trans-Alaska Pipeline Authorization

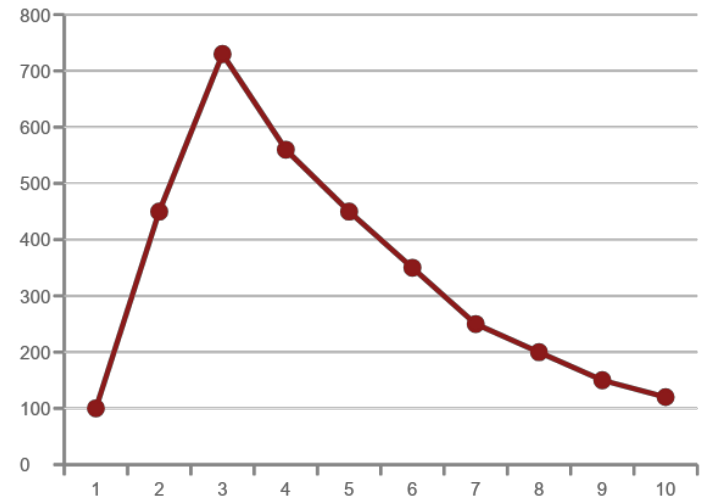
- Prudhoe Bay discovered in 1968, largest U.S. oil field at the time
- Authorization Act passed November 1973
- Construction began April 1974
- Mechanically completed May 31, 1977
- 800-mile pipeline linking the North Slope to Valdez



# Production Impact

- 18+ billion barrels transported since 1977
- Alaska production peaked near 2 million barrels per day in 1988
- North Slope output reached nearly 25% of total U.S. oil production at peak
- Significantly expanded domestic petroleum supply

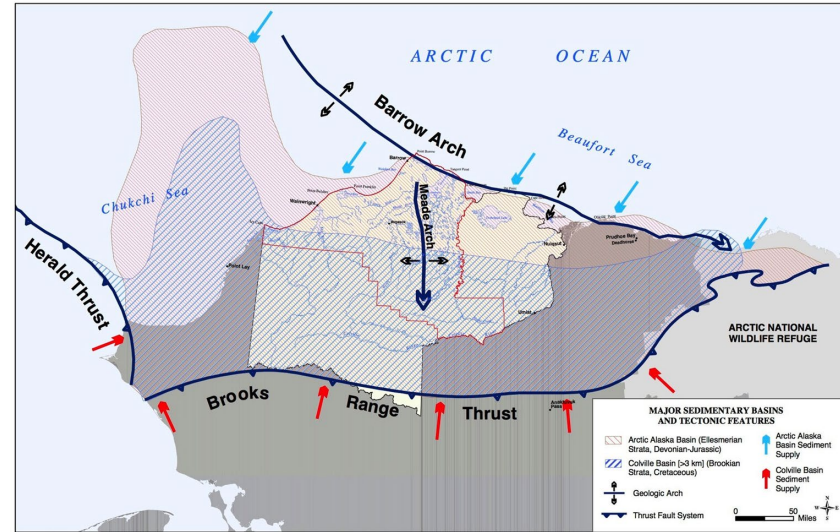
Alaska North Slope Crude Oil Production



Thousand Barrels • Data: U.S. Energy Information Administration

# Alaska Was There First

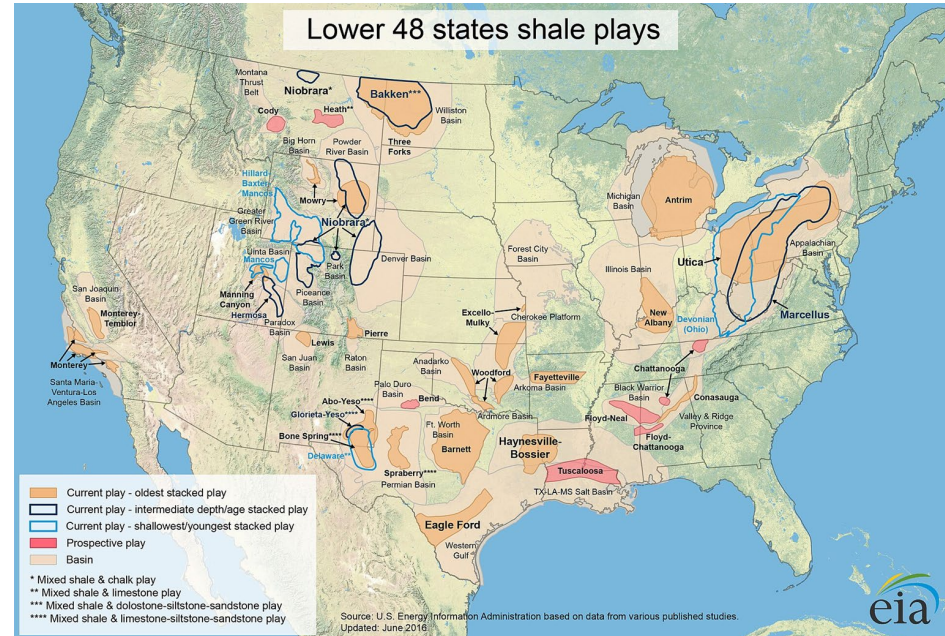
- The Alyeska Pipeline was built precisely to avoid the outcomes of 1973
- Alaska didn't just react to a global crisis — Alaska got there before everybody else
- Domestic energy dominance is the reason the President can act on Iran today — on a bipartisan basis



**We are not here to tell you why oil is important — we are here to show you why everything Alaska has is intersecting with where the world is right now**

# The Shale Revolution (2008–2018)

- U.S. crude production doubled from ~5 to ~11 million barrels per day
- Net imports fell from ~12 million barrels per day (2008) to near zero by 2020
- Natural gas production increased by more than 70%
- 2015 repeal of the crude export ban reopened global markets
- The U.S. shifted from price taker to price stabilizer



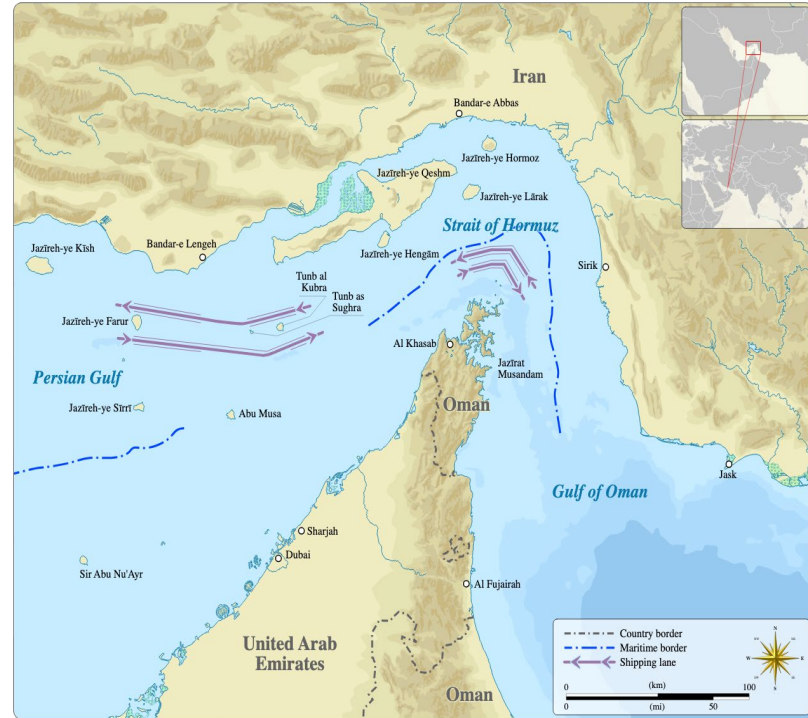
# Regional Realignment: The Abraham Accords

- The Abraham Accords created a new strategic alignment between Israel, UAE, Bahrain, Morocco, and Sudan
- These partners are now under direct Iranian attack — missiles struck Dubai, Abu Dhabi, Bahrain, and Kuwait
- The UAE spent an estimated \$1 billion per day intercepting Iranian missiles and drones in the first 48 hours
- Accords partners need reliable American energy supply more than ever — this is the alliance in action



# Contemporary Relevance

- October 7, 2023 reopened regional instability
- Strait of Hormuz carries ~20% of global oil supply
- Direct Iran–Israel escalation increased market volatility
- Energy resilience remains a strategic imperative



# First 100 Hours of War

## U.S. Operation Epic Fury

- 50,000 U.S. troops — largest regional military deployment in a generation
- 1,250+ U.S. strikes; B-2 stealth bombers hit underground missile facilities
- U.S. sank 9 Iranian Navy ships; Natanz nuclear facility struck

## Israel Operation Roaring Lion

- 1,000+ combat sorties; 2,000+ bombs in 30 hours
- Ayatollah Khamenei, Chief of Staff, and IRGC leadership eliminated
- Air superiority over Tehran achieved by March 1

## Iran's Retaliation

- 500+ ballistic missiles and 2,000+ drones at U.S., Israel, and allied Arab states
- Strikes on UAE, Kuwait, Qatar, Bahrain, Saudi Arabia, Oman
- UAE intercepted 172 of 186 ballistic missiles; 755 of 812 drones
- American soldiers killed in Kuwait; drone hit U.S. Consulate in Dubai

## Why This Matters for Alaska

- The U.S. could act decisively because it is not dependent on Gulf energy. Domestic production — including Alaska's — made this operation possible.

# Global Consequences: Why This Matters Here

## Iranian Impact — First Week

- ~20% of global oil supply and ~25% of global LNG passes through the Strait of Hormuz daily — roughly 21 million barrels per day
- Iran banned all food and agricultural exports — its economy is collapsing under wartime pressure
- Iran's economy was already in crisis before the strikes: the protests that began December 28 were driven by economic collapse
- Iran spent hundreds of millions rebuilding its missile program after the June 2025 12 Day War — resources diverted from a collapsing civilian economy
- With the Ayatollah dead and leadership decapitated, Iran's ability to maintain economic coordination and sanctions evasion is severely degraded
- Iran's oil exports — primarily routed through sanctions-evading shadow fleets — fund Hezbollah, Hamas, Houthis, and the Venezuela partnership; degrading those revenues degrades the entire proxy network

## Energy & Western Hemisphere

- Iran-Venezuela signed a 20-year cooperation pact covering oil, defense, and economics
- Hezbollah embedded in Venezuela alongside political leadership in criminal activity
- Iran provided combat drones and precision-guided missiles to Venezuela (July 2025)
- Russia, China, Iran, Venezuela operate as coordinated adversaries against Western energy security
- Every disruption abroad strengthens the strategic importance of reliable domestic production
- Iran is attacking nearly every OPEC nation — UAE, Kuwait, Saudi Arabia, Qatar — while OPEC+ has agreed to increase production, further undermining Iran's market leverage

# CSA in Real Time: This Week

Following U.S.–Israel strikes on Iran and rising regional escalation, CSA is hosting a week of live emergency briefings with senior military, intelligence, and diplomatic experts.

**MON 3/2**

**Brig. Gen. (res.) Yossi Kuperwasser**

*Iran at the Crossroads: Scenarios, Risks & Strategies*

Fmr. Head, IDF MI Research Division; CSA Advisory Board

**TUE 3/3**

**Lt. Col. (res.) Sarit Zehavi**

*Israel's Northern Front After the Iran Attack*

Founder, Alma Research Center; CSA Partnership Society

**WED 3/4**

**CSA Israel Research Fellow**

*100-Hour War Update: Play-by-Play Assessment*

CSA Research Team

**THU 3/5**

**The Hon. Elliott Abrams**

*Iran at the Crossroads*

Fmr. Deputy NSA; Fmr. Special Rep. for Iran; CSA Advisory Board

CSA released its 100-Hour War Primer on March 4 — real-time, open-source analysis available to policymakers nationwide.

# Why the Pipeline Still Matters

- Congress acted decisively after strategic shock
- Infrastructure investment delivered decades of capacity
- Domestic production strengthened U.S. strategic autonomy
- Crisis-driven infrastructure can generate long-term leverage
- Provides a framework for evaluating modern energy policy



# Everything Intersects

*We are setting the stage. We are not here to tell you why oil is important.  
We are here to show you why everything Alaska has is intersecting  
with where the world is right now.*

## **Energy Security**

Alaska's production is a strategic counterweight to Russia, Iran, and Venezuela

## **Iran Deterrence**

Domestic dominance enables bipartisan action against Iran — three times over

## **Abraham Accords**

New partnerships creating trade, investment, and diplomatic opportunities for energy states

## **Arctic & Pacific Strategy**

Alaska's geography makes it indispensable to America's strategic posture

# What Does CSA Do

- Rapid-response policy education during geopolitical crises
- Data-driven polling and strategic analysis
- Executive briefings with military, diplomatic, and industry leaders
- Public research on energy and security

## CSA Research & Analysis

- **Israel-Hamas War Report** — 850-day concluding report, the only open-source report of its kind
- **Iran-Venezuela Axis Primer** — Iran and Hezbollah's network in the Western Hemisphere
- **Venezuela Public Opinion Poll** — Morning Consult, 2,202 adults, January 2026
- **Lebanon & Syria Polling** — Regional sentiment on stability and reconstruction
- **U.S., Israeli, and global polling** on energy, security, and foreign policy
- **100-Hour Iran War Primer** - Real-time play-by-play assessment of the US-Israel strikes on Iran - Released March 4 2026

# How CSA Will Work with Alaska

## Delegations to the Oil Patch

CSA brings delegations of national security leaders, diplomats, and industry executives to energy-producing states. We've done this in North Dakota, Wyoming, and Oklahoma — and we want to bring a delegation to the North Slope.

## Ongoing Briefings

Regular updates on how global events — Iran, Venezuela, the Arctic — affect Alaska's energy economy and strategic position

## The Energy Council Partnership

Alaska's membership in The Energy Council positions the state at the center of the national energy security conversation

## National Platform

Elevating Alaska's story in Washington, D.C. and connecting state leaders with international investment and partnership opportunities