

# Introductory thoughts on the Geopolitics of Energy

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Note: Students are expected to read this document in conjunction with the articles linked here

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*“What do you think would happen if, all of a sudden, the country where you live no longer had access to foreign sources of energy and the emergency systems could not supply the entire system for, say, a week? Such a situation ... would evidently have significant adverse consequences for the daily lives of all citizens and highly negative macroeconomic implications. This serves to demonstrate the importance of having access to energy sources, continuously and at an affordable price. Thus, countries that have control over their energy sources can better protect their national interests and, in parallel, exert economic and political influence at the international level. In contrast, economies that are dependent on imports of fossil fuels may suffer energy security problems.”* ([The geopolitics of energy](#))

This course approaches the field of energy geopolitics from both a macro (Platias) and micro (Paravantis) perspective.

Platias = big-picture; grand strategy; inspired by theory; qualitative approach

Paravantis = nitty gritty; driven by research; more quantitative approach

*Geopolitics of Energy can be defined as ‘the effect that location of resources has on the politics of states’. The key activator of that effect is dependency, which applies both to producers (revenue) and consumers (energy needs). Historically it has been the threat to supply rather than to price which has caused most concern to the consumers, and this culminated in the Gulf war reaction to Iraq’s seizure of Kuwait in 1990. In future the Middle East and OECD as a focus of energy geopolitics will be supplemented, it not replaced, by Russia, Central Asia, China, India and the Far East as those areas increasingly influence both the supply and demand balance for both oil and gas.*

<https://www.jstor.org/stable/43866316>

Energy-driven geopolitical considerations are a prominent and pervasive characteristic of the national security policies of many countries. We will largely adhere to a framework that is unique to the twenty-first century's global security framework.

Let’s look at some important milestones in the history of energy geopolitics (we will look at more milestones later in my lectures).

1950s

US President Eisenhower’s “atoms for peace” program (announced by President Eisenhower in 1953), “[a risky balancing act between war and peace, secrecy and transparency](#)”

[Above ground nuclear testing](#)

Proliferation of nuclear weapons.

**ATOMS FOR PEACE**

"...the United States pledges before you -- and therefore before the world -- its determination to help solve the fearful atomic dilemma, to devote its entire heart and mind to find the way by which the miraculous inventiveness of man shall not be dedicated to his death, but consecrated to his life."

DWIGHT D. EISENHOWER  
President of the United States  
Addressing the General Assembly of the United Nations, December 8, 1953

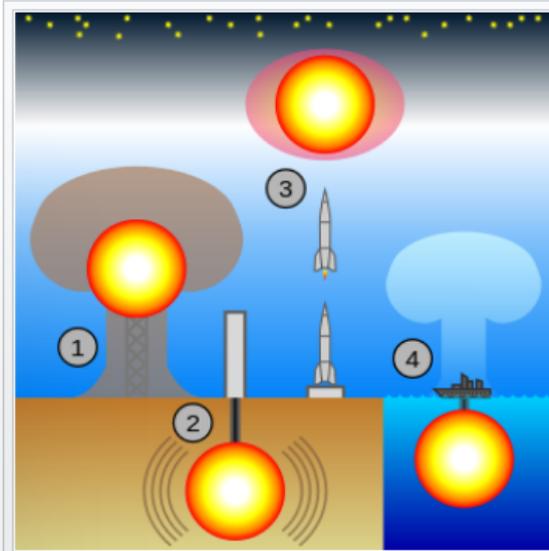
SUPPLEMENT TO  
**Free World**  
VOLUME V - NO. 6  
JUNE - 1956

THE...INVENTIVENESS OF MAN SHALL...BE...

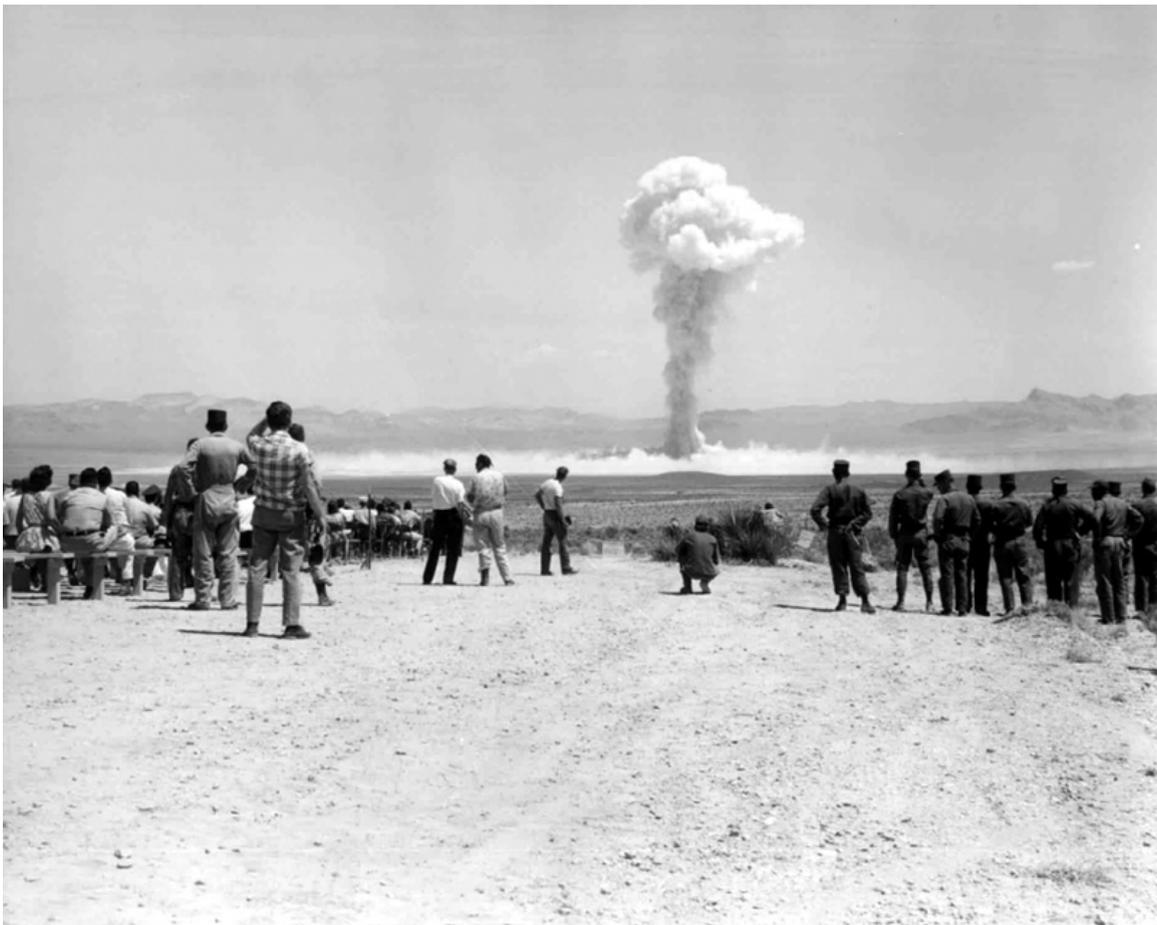
CONSECRATED TO HIS LIFE

ATOMS FOR PEACE

3¢ UNITED STATES POSTAGE 3¢

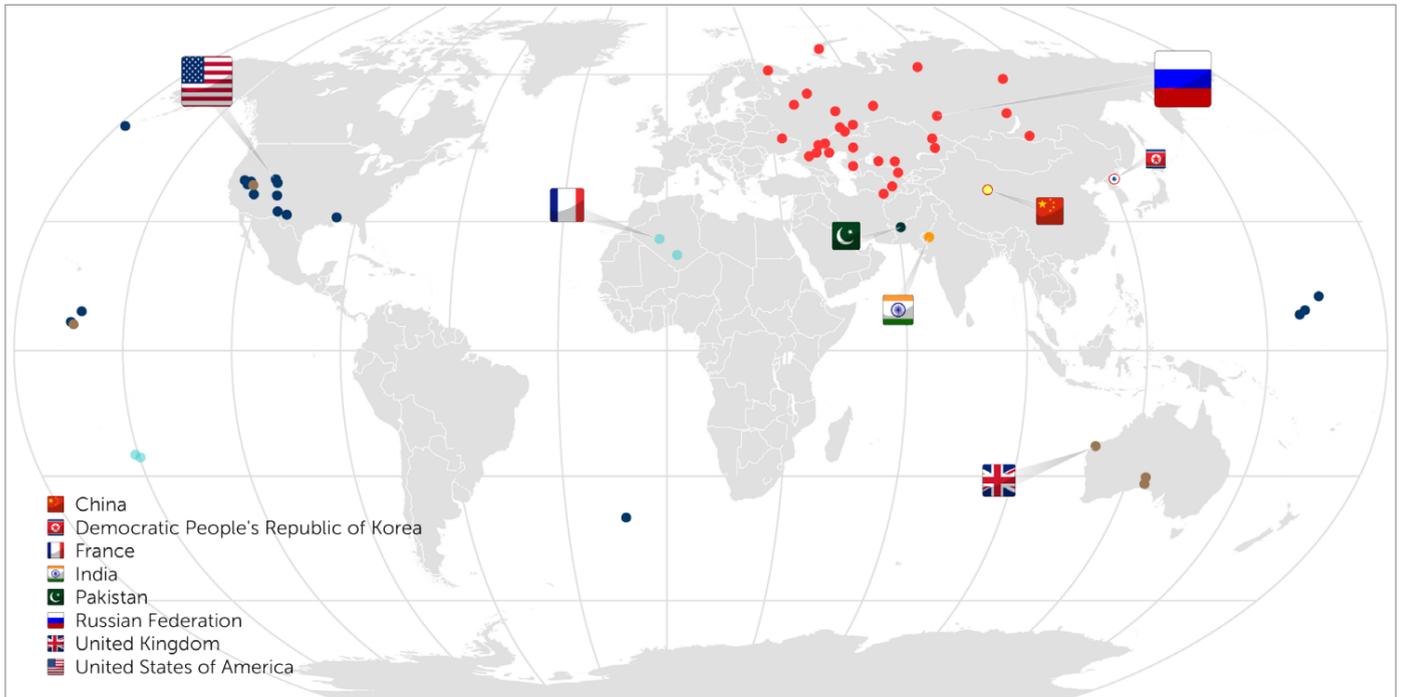


Four major types of nuclear testing: 1. atmospheric, 2. underground, 3. exoatmospheric, and 4. underwater





The mushroom cloud of the 15 megaton Bravo test on Bikini Atoll in March 1954. The test, carried out as part of Operation Castle, was the largest nuclear device ever detonated by the United States (Photo: United States Department of Energy).



Overview of nuclear tests since the first nuclear device was detonated in the USA in 1945 (Source: CTBTO.org).

1960s

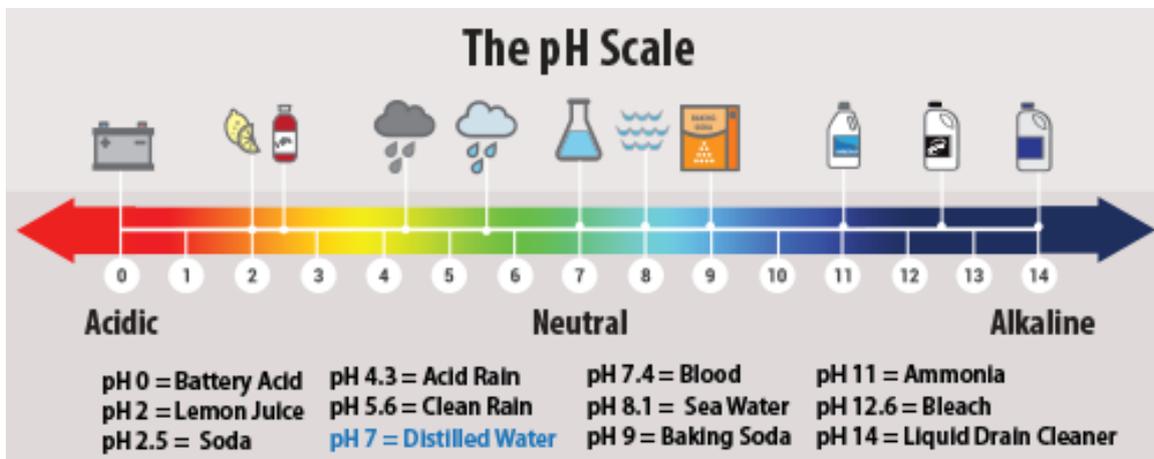
Nuclear test-ban treaty (“*Treaty Banning Nuclear Weapon Tests in the Atmosphere, in Outer Space and Under Water*”), 1963, prohibiting all test detonations of nuclear weapons except those conducted **underground**

Nuclear non-proliferation treaty (NPT, 1968): “*...the NPT's first 50 years have been remarkably successful. But there are warning signs that its continued success cannot be taken for granted.*”

1970s

Western industrialized world awakened to oil vulnerability by **Arab oil embargo** (will look at dates when we discuss energy security milestones)

Emergence of environmental issues (such as **acid rain**).



1980s

Collapse of the **Soviet Union** ([Gorbachev's speech, December 25, 1991](#)) and its control over Central and Eastern Europe (the "[Iron Curtain](#)")

Cessation of favorable Soviet energy pricing to Warsaw Pact allies (in return for political subservience).

1990s

[Emergence of the European Union](#) (EU)

US **Clean Air Act** (mainly to curtail acid rain)

2000s

Energy hostilities between **Ukraine** and the **Russian Federation** (over price mechanisms and strategic concessions)

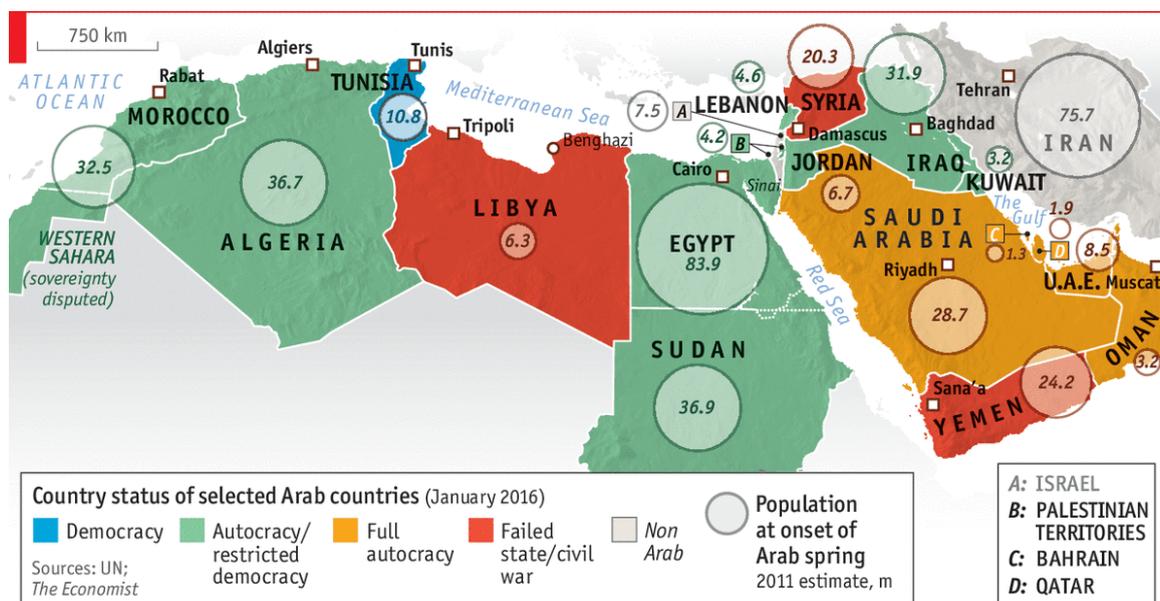
2010s

EU's geopolitical battle over Russian gas dependence

Support of construction of new infrastructure to diversify markets and reverse gas flows

**Energy Union** with its [five policy pillars](#) (security of supply; internal energy market; energy efficiency; decarbonization; innovation)

**Arab Spring** (as OPEC producers feared losing control over their own civil societies).



*"The Arab Spring was a series of pro-democracy uprisings that enveloped several largely Muslim countries, including Tunisia, Morocco, Syria, Libya, Egypt and Bahrain. The events in these nations generally began in the spring of 2011, which led to the name. However, the political and social impact of these popular uprisings remains significant today, years after many of them ended"* ([Arab Spring](#))

Later in the class, we will look at the history of **energy security**, an important concept in the geopolitics of energy.

*"Whereas the Age of **Coal** and Steam was the backdrop for the **British Empire** in the 18th and 19th centuries, the Age of **Petroleum** has been the backdrop for the **American Empire** from the end of the 19th to the early 21st centuries ... **Asia** has become 'ground zero' for growth" as far as the consumption of energy ... over the next 20 years, 85 percent of the growth in energy consumption will come from the Indo-Pacific region. Already, at least a quarter of the world's liquid hydrocarbons are consumed by China, India, Japan and South Korea ... China will account for 40 percent of the growing consumption until 2025, after which India will emerge as the biggest single source of increasing demand ..."* ([The Geopolitics Of Energy](#))

Geopolitics of energy examines the intersection between international security, politics, and energy (and the environment, e.g. link between ecological and national security).

Energy geopolitics implies a twin recognition

Throughout history, **energy** has been a significant determinant of **power** in the international system.

Shifts in global energy patterns bring with them changes in international politics.

Energy geopolitics explores how countries shape their grand strategies to meet their energy needs, as well as the implications of such action for other countries and global politics.

Pressing contemporary issues include

**Peak oil**

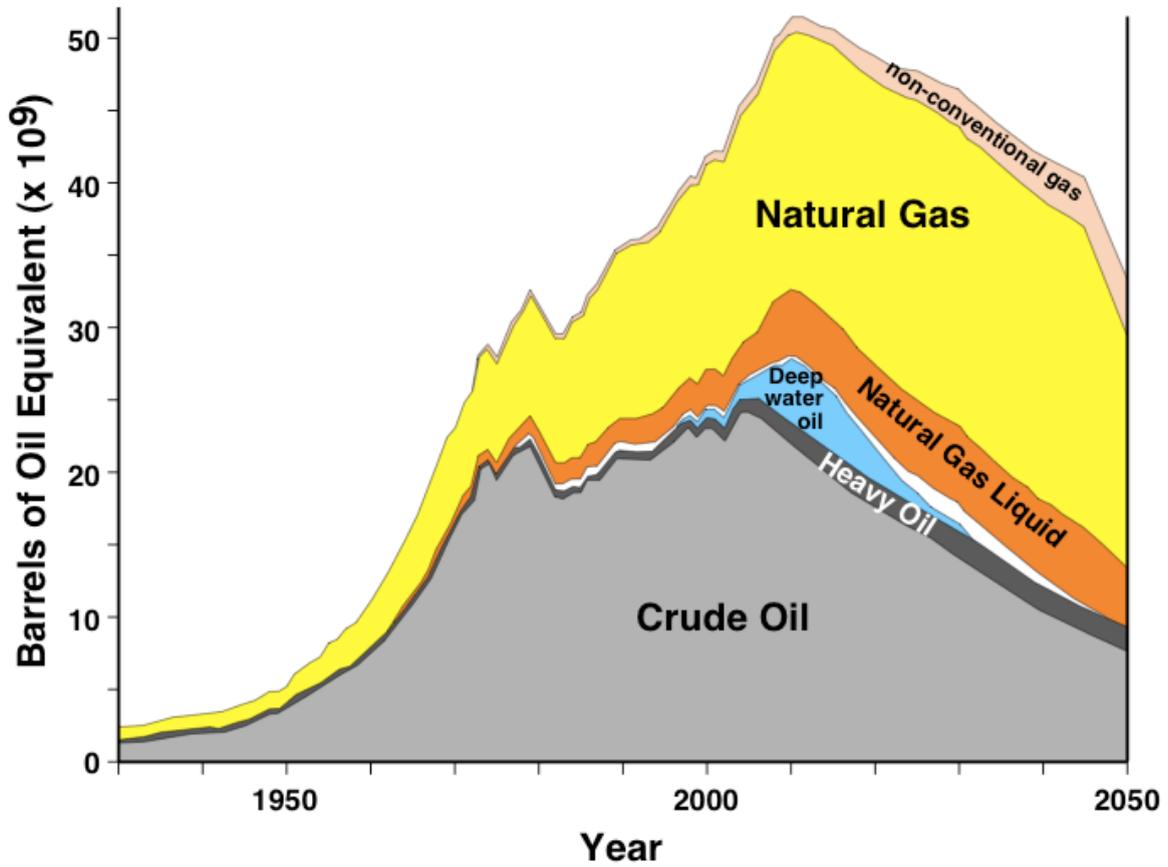
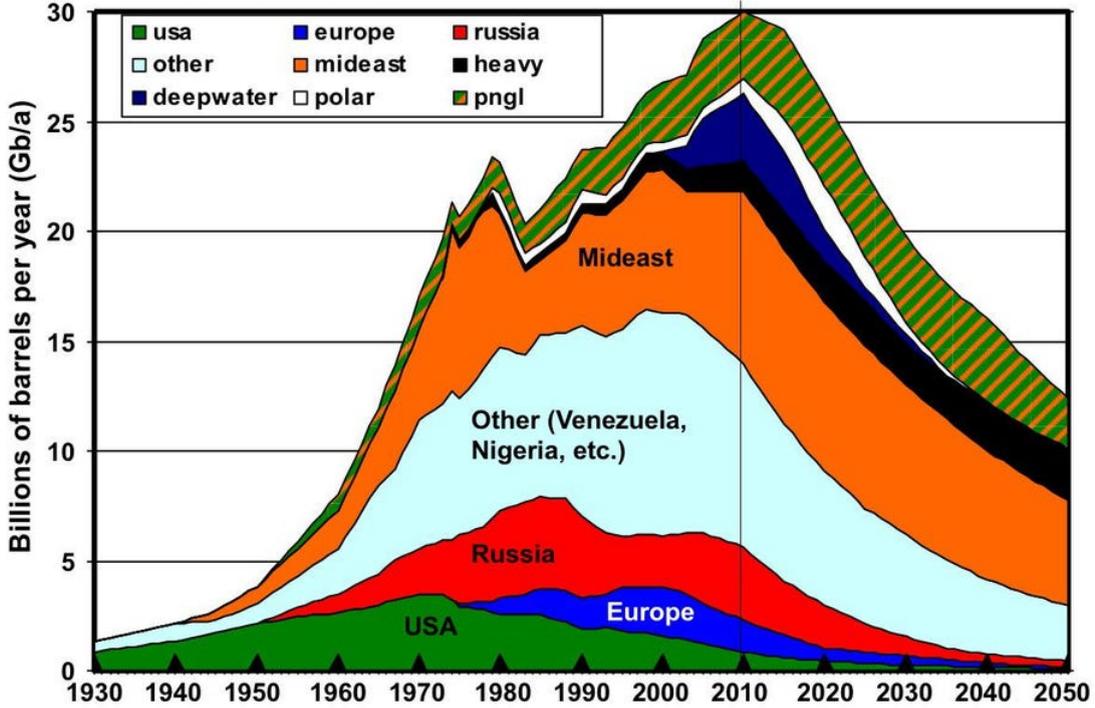
Aggressive pursuit of oil and gas worldwide.

Oil's leverage derived from virtual monopoly as transportation fuel

Pipeline politics (with Professor Farantouris being an expert)

**Energy** and **political reform**

# Petroleum Geologists Predict Peak Oil Soon!



This is what heavy oil looks like



The example of **Iran**

Derives influence by its threat to shut-down the Persian Gulf transit spigot (through which passes daily 20% of the world's oil)

Has funded its nuclear ambitions with [Chinese and Indian](#) money

This is how it gains geopolitical clout.



The example of the **Arctic**

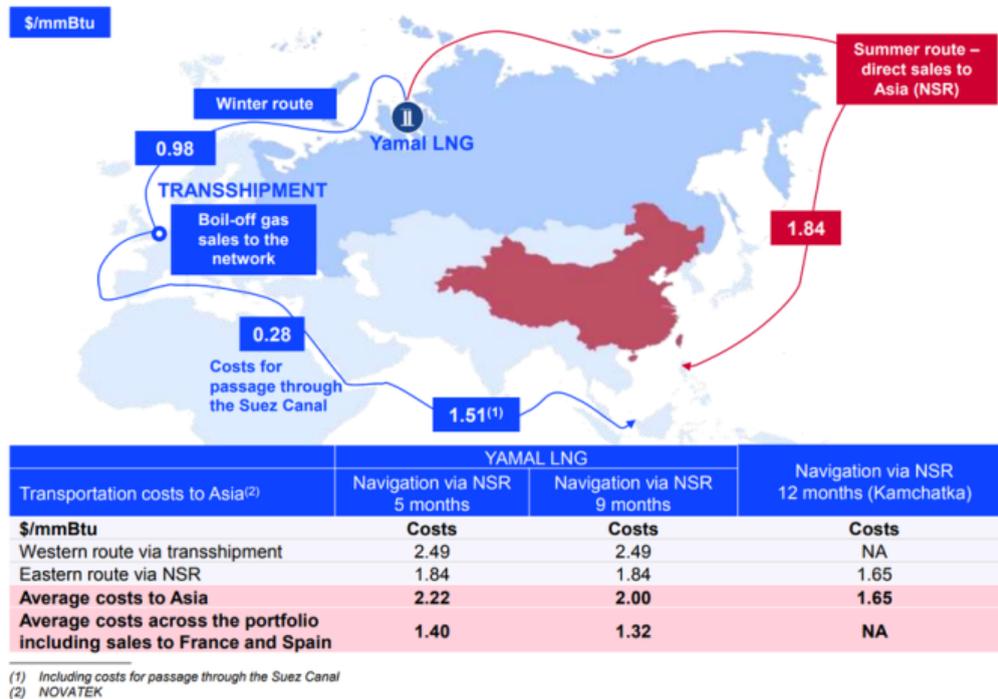
Historically apolitical region, resource reserves now politicize the polar tundra

*"The Arctic is the most graphic example of climate change impacting geopolitics. A whole vast region, previously permanently icebound, is opening up for commercial navigation and energy exploration. The international community stands before a range of new opportunities, but it is also faced with a series of issues waiting to be resolved. The question now is whether these challenges will promote global cooperation or foster dangerous competition in the Arctic."* ([FIVE ISSUES AT STAKE IN THE ARCTIC](#))

Arctic resources traditionally handled by littoral states

China wants to get into the act by building infrastructure to allow navigation in a region where it has no sovereign presence.

*“China is an important stakeholder in Arctic affairs. Geographically, China is a ‘Near-Arctic State’, one of the continental States that are closest to the Arctic Circle ... The natural conditions of the Arctic and their changes have a direct impact on China’s climate system and ecological environment, and, in turn, on its economic interests in agriculture, forestry, fishery, marine industry and other sectors.”*



Energy geopolitics also considers

New technologies and innovations, such as those that make shale gas extraction economically viable and that aid in the growth of renewable energy sources such as solar power

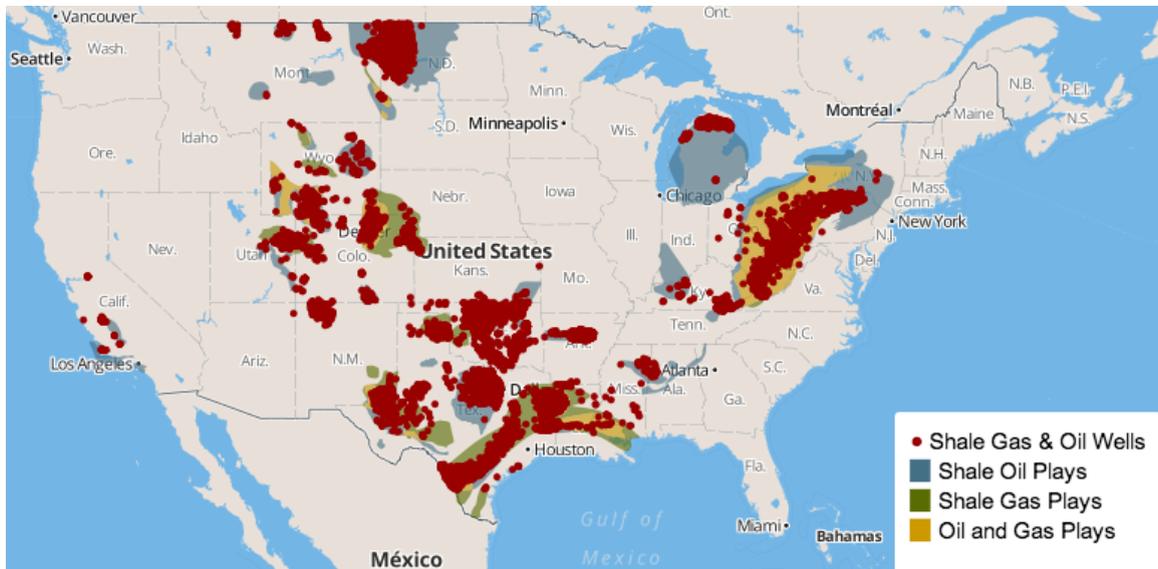
How these new technologies and innovations are reshaping trade patterns and forming new alliances.

The unconventional oil/gas findings in the US (which we will discuss in greater detail when discussing energy security)

Have enhanced its energy security

Have provided Europe with access to LNG as an alternative to Russian gas

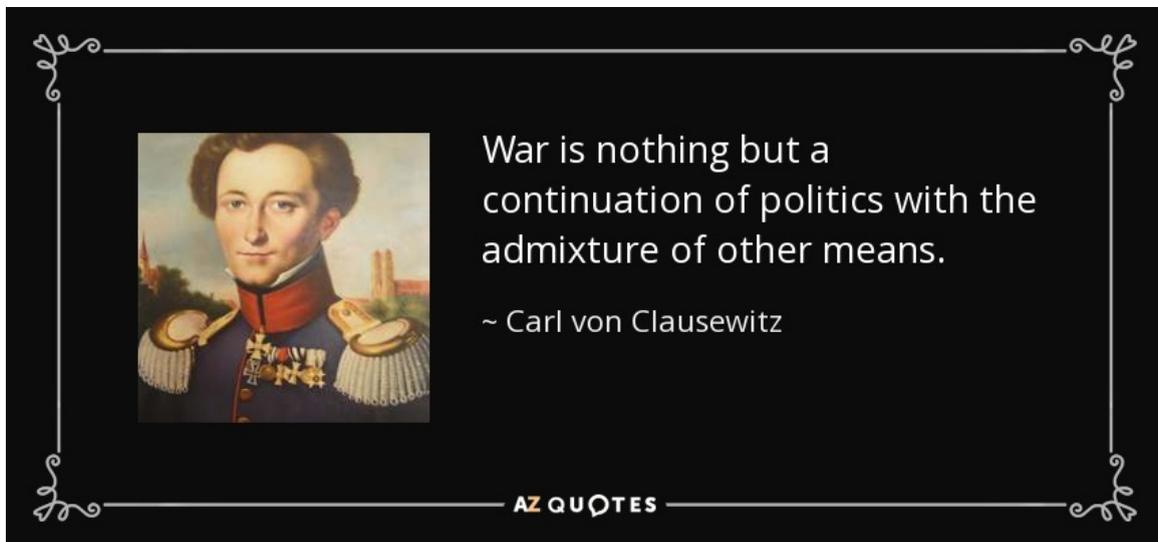
Show how a technologically driven revolution may have global geopolitical implications.



Finally, energy geopolitics

- Considers the consequences of a successful shift away from petroleum based economies
- Anticipates how a new energy order will alter global politics in fundamental ways.

Geopolitical twist on Carl von Clausewitz's quote: *energy is the continuation of politics by other means* (especially in the energy-politics nexus of this first part of the 21st century).



## Thoughts on Putin's Ukrainian war

The unexpected transformation of the internal political landscape in the US

*"There was a time, in the pre-Trump era, when Republicans would have erupted in fireworks over an Independence Day visit by submissive American lawmakers to the country the 2012 Republican presidential nominee called "our number one geopolitical foe." (Relations have worsened considerably since then.) They called Jane Fonda "Hanoi Jane" and a traitor when she went to North Vietnam*

in 1972. After Democrats visited Iraq in 2002, Republicans ridiculed them as “Baghdad boys.” ([Opinion: Eight Republicans pick the worst possible place to celebrate July 4](#))

*“Here, laid bare, are the impulses of a large swathe of today’s Republican Party. In any other era, our political leaders would be aghast at the rank opportunism, moral flippancy and borderline treasonous instincts on display ... What I never expected was that the Republican Party—which once stood for a muscular, moralistic approach to the world, and which helped bring down the Soviet Union—would become a willing accomplice of what the previous Republican presidential nominee rightly called our No. 1 geopolitical foe: Vladimir Putin’s Russia.”* ([How the GOP Became the Party of Putin – Republicans have sold their souls to Russia. And Trump isn’t the only reason why](#))

*“US President Donald Trump has admitted his son met a Russian lawyer in June 2016 “to get information on an opponent”, but argues it was legal ... President Trump denies any collusion ... Russia has repeatedly denied claims it interfered in the November 2016 presidential elections, where Mr Trump defeated Democratic rival Hillary Clinton.”* ([Trump admits son met Russian for information on opponent](#))

*“President Putin, he just said it’s not Russia ... I don’t see any reason why it would be.”*

[John Kennedy vs. Vladimir Putin: How Trump defenders’ Ukraine talking points compare to what Russians say](#)

“Putin has gained too much sway over the Republican Party over the last several years. Even on the eve of Putin’s brutal and unprovoked invasion of Ukraine, former President Donald Trump called his strategy “genius.” ... The Kremlin has a long history of skillfully cultivating “useful stooges” in the West dating back to Soviet Union ties with liberals intoxicated by the promise of a worker’s paradise. Putin set out to turn the Republican Party before Trump was elected. Trump’s campaign led by Paul Manafort asked to delete from the party platform language that called for “lethal aid” for Ukraine. Manafort had been a political consultant to Putin stooge and former President Viktor Yanukovich, who was deposed by the Ukrainian people for his anti-Western views.” ([Kick Putin out of the Republican Party](#))

It has been argued that Putin has been successfully manipulating the conservative movement of the US political scene since the Obama years (i.e. even before Trump) by morphing his regime into a paragon of traditional values.

[How Putin's oligarchs funneled millions into GOP campaigns](#)

[Fuel expert warns Americans to conserve gas as Ukraine war pushes average prices to \\$4.17 - the highest in US history - with one gas station in California charging \\$7.59 a gallon and warnings that prices won’t fall until NOVEMBER](#)

Should the West do more?



**John Spencer**  
@SpencerGuard



This makes me very sad. Like I am not doing enough. I have girls this age. We (the world) must do more to help Ukraine. I understand all the political and escalation lines. I don't care. We can and must do more.



1:35 AM · Mar 11, 2022



**Mike Mazarr**  
@MMazarr



A quick thread about moral injunctions, imperatives, MiGs, no-fly zones, and the standards for effective judgment. Overall message: Acting on the basis of imperative-driven thinking, especially under time pressure in a crisis, is a common prelude to disaster

12:37 AM · Mar 10, 2022





**Mike Mazarr**  
@MMazarr

7/ This pattern of "imperative driven thinking" is littered all over the transcripts, records, + memos of groups marching righteously toward disaster. Iraq 2003. Vietnam 1964-5. Market Garden 1944. Moscow + Afghanistan, 1979. CEOs of financial firms bounding into CDOs pre-2008

12:37 AM · Mar 10, 2022



### [What the US is doing](#)

A nightmare scenario: Russia excludes Europe from gas supplies

Moscow is openly threatening to cut off gas supplies to Europe if European leaders ban oil imports from Russia.

Proposals [considered by the EU](#) ([source in Greek](#)) aspire to replace the 155 billion cubic meters (bcm) of gas imports from Russia with 112 bcm

About 50 bcm per year will come from new LNG sources

10 bcm will come from pipelines from other providers

20 bcm will come from new wind farms.

How forecasts become obsolete

*"... the main beneficiaries of this greater use of natural gas will be the biggest current net exporters (Russia and Qatar), as well as those expected to increase their net exports over the coming years (mainly Iran and the US, according to estimates by the US Energy Information Administration, or EIA). On the other hand, those adversely affected by the new energy mix will be Saudi Arabia, given that oil will make up a relatively smaller portion of the new energy mix, and the main exporters of coal, namely Australia and Indonesia, whose exports go to India and, above all, to China."* ([The geopolitics of energy](#))

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## Sources

1. From the Editor, Energy Geopolitics in the 21st Century, April 19, 2012, [http://www.ensec.org/index.php?option=com\\_content&view=article&id=350:energy-geopolitics-in-the-21st-century&catid=122:fromtheditor&Itemid=389](http://www.ensec.org/index.php?option=com_content&view=article&id=350:energy-geopolitics-in-the-21st-century&catid=122:fromtheditor&Itemid=389)
2. Professor Meghan O'Sullivan, IGA-412: The Geopolitics of Energy, Harvard, <https://www.hks.harvard.edu/degrees/teaching-courses/course-listing/iga-412>