

Energy Geopolitics

Part I

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Theme: [Oil and Energy](#)

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Scholars disagree whenever there are 45 or even 83 definitions of energy security. Its understanding varies depending on the country in which is defined, its geographical, cultural and consciousness conditions.

*There are also different priorities within societies, depending on the position in the supply chain. The widest accepted **Yegrin’s** definition focuses on “adequacy, reliability of and reasonability of prices”.*

But this may confusingly indicate the priority of consumer interests (which even the naivest people probably stopped believing in by Autumn 2021 at the latest), and the “rationality of the markets” what is the oxymoron.

*No, completely different factors are decisive and it is clearly visible in the clash of seemingly separate strategies, such as the **shift towards renewable energy (RE)**, currently presented as a response to climate change and the Western actions related to the war in Ukraine.*

(Un)natural shift

The introduction of the geopolitical dimension to the analysis of energy security in the context of RE only seemingly looks like a paradox, as this aspect is often ignored in discussions on the energy transition. But is obvious that the shift to RE would not arouse such interest from some governments, especially European ones, without geopolitical advantages for the continent having only 1% of global oil and 2% of natural gas reserves. 27 present EU member states and the UK rely on external energy supply.

Even if they possess fossils’ reserves themselves (like gas or oil), then rarely all at once, and never in the quantities used to cover all demand (Dutch gas, Scottish oil, Swedish uranium). That is why we should distinguish these issues as a **separate ‘energy geopolitics’**.

Such a discipline may be considered young, but some researchers dare to draw **parallels**

between hegemonic cycles and the dominant fossil fuel: coal for British hegemony in the 19th Century and oil for American domination. In this context, it is crucial for further considerations on energy security to determine whether the assumed shift to RE may also have a geopolitical dimension, eliminating or at least weakening the possibility of the emergence of another hegemon of the unipolar World.

Who pays the bills?

Instead, the immanent features of RE would favour a multipolar network, with particular participation of non-state actors, especially NGOs and *global civil society*. It would also be a significant paradigm change within IR theories, shifting the burden from a realistic geopolitical approach, seeing energy security as a strictly competitive game – towards the '*global energy governance*' assumption, based on cooperation and interdependence, and therefore *naturally peaceful*. Such understood energy transition would also mean social change, with RE modifying the shape of social hierarchy, increasing the importance of the prosumers (i.e. producers and consumers at the same time), thus leading to a renewed type of society.

However, it is the social factor that often rejects changes, the most famous examples are known from the French Isle of Sein and Greek Crete. The common acronym for such an attitude is **NIMBY**: '*Not In My Back Yard*', that means '*Even if I do not question the rightness of the change itself – I refuse to bear any costs related*'. And **this resistance is fully justified, since the current costs are always on the side of the consumers and workers, and the profits on of the bank accounts of the Global Capital.** The very vision of a *happy global society* of minimal needs, generating energy on the side to satisfy small independent communities seems to be attractive for anti-system movements from left and right – but is clearly **utopian and anachronistic** considering involvement of both state global corporate actors. This is no longer the initiative of a nice, only a bit grown up hippies, and at the real decision-making level, it probably never was.

The New Hegemony

Concept of the *unequivocally positive influence of RE on the reduction of geopolitical risk* is also questioned. It is obvious that the increasing share of RE in the energy mix reduces the geopolitical influence of gas and oil exporters. Critics argue that this may only mean changes in the leading positions within energy competition, without violating the rules of that challenge. **Just instead of fossils, the exporters of rare earth elements (REE) used in the production of RE infrastructure would gain importance.** Examples are the embargo imposed by China on REE export to Japan in 2010, the Sino-American conflicts caused by subsidising solar panels production in 2012/2013, dispute about subsidies for the wind turbines producers, and controversy about customs tariffs for REE within China-USA and China-EU trade relations. So far, these controversies have been resolved at the WHO forum, but they prove that the tensions in IR will not disappear as a result of the technological change in energy production only.

Scholars emphasise the **threat of supply shocks of REE** used in the production of hybrid electric vehicles and some types of wind turbines, caused by assumed increase in demand on neodymium (forecasted 7% increase) and dysprosium (even 2600% increase!) in the next 25 years. Demand for lithium used in battery cells is expected to grow at 674% by 2030. Although critics admit that not all components of advanced RE technologies are

actually that rare and can be explored in much more countries than hydrocarbons. However, REE exploitation is associated with high environmental costs, difficult to be accepted in developed part of the World and production in peripheral countries is frequently disrupted, as in the case of cobalt used for battery cells, extracted in the Democratic Republic of Congo. **Therefore, there is a potential risk of both a lock-in on REE-based technologies and the threat of new hegemonic conflicts over resources,** which could occur e.g. in the Atacama Desert rich in lithium reserves.

Totalitarian Global Energy Market

The scarcity of space may also be conflicting, when onshore and PV-farms could require area up to 100-fold more than non-RE electric generation infrastructures. It also opens up scope for potential conflicts over new divisions of the sea shelf for offshore installations.

Even basing international energy cooperation on the cross-border transfer of electricity seems to be controversial. Supporters of such a transition argue that it promotes *peaceful interdependence related to mutually beneficial exchange*. According to critics, there will be just new opportunities for 'geopolitical leverage' between electricity exporters and importers. The technological development of transmission networks, such as the popularization of UHV, may create new challenges as the need for a **unified management of the global grid**, which in turn is in contradiction with the assumption of more local nature of the new system. And opposite, the dispersion of energy generation can be seen as an incentive for separatisms and centrifugal movements. Especially in extreme conditions, such as war or escalating terrorism and cyberterrorism, this may not only prevent the planned global integration, but even disintegrate the current structures into unrelated geopolitical 'energy islands' what we can observe in Libya as effect of Western aggression. The rest has to be managed and governed, in a standardised and uniform manner. The question is by whom, since the energy transformation continues in the name of strengthening the neoliberal paradigm, deregulation and marketisation. **The logical consequence is the World Government, of course as a tool steered by the Totalitarian Global Market.**

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