



Rosío Vargas\*

## Following the Trail of U.S. Energy Strategy An Academic Biography

This article traces my career as a researcher at the Center for Research on North America (CISAN) along with the changes in the international energy context—that of the United States and Mexico itself—which have made for changes in approaches and methodologies, in order to understand the current situation.

I began my work in the early 1990s with a research project about “U.S. Energy Policy: Implications for Mexico,” at the same time that the UNAM launched the Center for Research on the United States of America (CISEUA). My research has followed the institutional changes at the research center and developed parallel to the changes in the international energy system. My work’s orga-

nization has evolved and matured epistemologically in a process that began with the use of the analyses of other specialists and moved to the development of my own hypotheses, using interdisciplinary and wholistic approaches to explain different elements of the research object.

The first important issue to address at the time was the negotiation of the Free Trade Agreement, later the North American Free Trade Agreement (NAFTA). This was an opportunity to look at the United States beyond its activities as a rational, unified actor and instead begin analyses of the different existing interest groups, based on recognizing asymmetrical perspectives and negotiations. These approaches have continued to be valid.

At that time, I also began to analyze the U.S. from the point of view of energy security; over time this has changed

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in terms of the role of oil resources and the Mexican market. The changes stem from the different conditions of the U.S. and Mexican oil industries, their geological moments, and the market agreements for bilateral energy trade.

The events of 9/11 in New York and the U.S. invasion of Iraq in 2003 led me to adopt a realistic perspective of that country's behavior in taking over other countries' resources and oil rent, its interest groups, regime change, and the imposition of market models in countries where they had not been predominant before. I wrote about the neoconservatives' project and their vision for the future of the control of the Middle East. This made many think that the aim of the Iraq invasion was not oil but territorial control. The review of the oil contracts negotiated by Saddam Hussein with many countries except the United States and the United Kingdom made me certain that the invasion was to ensure the supply of oil, since these powers attempted to recover it and their profits *vis-à-vis* other competing countries already operating in the Iraqi oil industry.

Since joining CISEUA —later CISAN, which included the rest of North America as an object of study—, I have worked on the energy policies of the different U.S. administrations. Therefore, I have written about the administrations of both George Bushes (father and son), and those of Bill Clinton, Barack Obama, and Donald Trump, attempting to underline the changes in energy policy domestically as well as U.S. behavior in the international sphere.

Mexico's lining up with the project of integrating the North American region also meant changes in my methodological approach to incorporating the region's process of energy integration and the comparative analyses of Mexico's energy sector with its counterparts in the United States and Canada, from which numerous articles on the topics were derived.

Because U.S. policies have an impact on Mexico, I continued to follow Mexico's 2008 and 2013 energy reforms since outside elements have been determining factors in them. Their driving force comes from the think tanks in the powerful countries, U.S. governmental agencies, NGOs, embassies, and other lobbyists for transnational energy corporations, who lobbied for those reforms. My interest led me to try to understand what was being negotiated based on analyzing the laws and their implications for the energy sector and Mexican society in general. My ac-

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cess to the Senate as an advisor to one of the congressional caucuses was key for doing this.

The U.S. energy revolution, starting with fracking for exploiting non-conventional resources, has been analyzed by U.S. Americans themselves with a geopolitical vision due to the project's global scale. Their situating it in their think tanks as a geostrategic project forced me to delve into geopolitical approaches by incorporating hard data, history, and politics in their interaction with geography. That allows me to teach a class in the graduate division of the School of Political and Social Sciences for those who want to understand the geopolitics of energy.

In my career, I have encountered at least two systemic transitions that have marked changes in orientation of my research and another, in the U.S. energy sector itself that has led me to change topics and hypotheses due to their importance for Mexico as a nation and the world in general:

#### 1. From the preeminence of oil to low-carbon sources

While I continue to work on oil issues, it has been necessary to delve into other energy sources such as what are called renewables (fundamentally solar- and wind-based); and, in the electricity sector, to monitor the changes in the world energy system and their implications. I have found that the geopolitical approach is a tool that allows us to look at all energy and fuel sources without losing sight of the technical aspects that, while they are important, distract us from the interest in focusing on the power behind the participants and the geostrategies designed in the developed countries.

#### 2. From the preeminence of oil-producing countries to oil consuming countries

After the United States' 1973 oil embargo of the Arab countries, prices soared, peaking during the 1994 crisis. At that point, the developed nations implemented a series of measures to reduce their vulnerability *vis-à-vis*

the oil-producing countries. Among them were reducing consumption, building strategic reserves, and developing other energy sources. One of the U.S. policies that most impacted Mexico was favoring the producers that did not belong to the Organization of Petroleum Exporting Countries (OPEC). Among those were Mexico and the countries of the North Sea. Recycling petrodollars during the first crisis was the other situation that they aimed to change. Plummeting oil prices in the early 1980s were the first indicators that the producers' control was weakening. Today, control of the oil market has not only passed into the hands of the consuming countries, but the OPEC has retreated in the face of the United States as a producer and the threats of sanctions given the attempt to accuse it of monopolistic practices, showing the way that the United States uses the oil market as a political strategy.

### 3. From dependence on oil to the Trump Administration's energy dominance

From 1947 to 2008, the U.S. energy sector was mainly characterized by high oil consumption; it reached a maximum of 21 million barrels a day, which domestic supply could not cover. The deficit had to be covered by imports from neighboring countries (Canada and Mexico), as well as those in other latitudes such as the Middle East. Thus, for more than 40 years, the United States guaranteed its security and the diversity of its supply of oil from abroad.

This led to a continual increase in its dependence on foreign imports, which peaked in 2005, when they reached 60 percent of national consumption. Thanks to energy efficiency policies beginning in 2008, demand began to drop so that, by 2010, consumption was down to 18 million barrels a day, almost a million and a half less. At the same time, the supply of hydrocarbons began to rise in a trend that has continued until today, 2020.

By 2018, the energy security strategy had left the historic objective of seeking "energy independence" in purely official discourse. Today, the Republican administration focuses on handling foreign policy based on the new energy context, which allows for its energy dominance over the fundamental variables of the international oil market and U.S. foreign policy.

Nevertheless, despite having turned itself into an energy powerhouse, the United States continues to consider the energy issue a matter of national security. This is due to its purchases abroad, the strategic nature of oil, and having made energy part of its foreign policy, in which the power of energy is fundamental in its competitiveness strategy —"America First"— and its preeminence vis-à-vis its rival powers (China and Russia).

During the time I have worked at CISAN, I have had the opportunity to write about these systemic changes, possible only if one can follow them over time. I want to thank the CISAN and the UNAM for having given me the privilege of learning about this vast, inexhaustible topic. ■■■