

WEBVTT

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<v SPEAKER_1>Hello and welcome to Energy Security Cubed, Canada's foremost energy geostrategy podcast, where we explore the factors shaping energy and economic security in Canada and around the world.

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<v SPEAKER_1>I'm Joe Calnan, Vice President, Energy and Calgary Operations at the Canadian Global Affairs Institute.

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<v SPEAKER_1>For today's interview, recorded May 19th, 2026, we talk about the history of Britain's control over global oil flows and what it could tell us about the current moment.

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<v SPEAKER_1>I'm happy to be joined here by Ian Wereley.

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<v SPEAKER_1>Ian is an adjunct research professor at Carleton University's Department of History, where he specializes in the past, present and future of oil.

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<v SPEAKER_1>He also serves as an adjunct curator of the history of energy at the Canada Science and Technology Museum.

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<v SPEAKER_1>Delighted to have you on the podcast, Ian.

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<v SPEAKER_2>Well, thanks for having me on the podcast, Joe.

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<v SPEAKER_2>Grateful to have the opportunity to speak with you and your listeners.

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<v SPEAKER_1>Yeah, absolutely.

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<v SPEAKER_1>And we don't get enough of these kind of history podcasts getting really deep into kind of why we are where we are, I suppose.

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<v SPEAKER_1>And so I really like to have people who are experts on this on here and there to really walk us through how we got here.

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<v SPEAKER_1>But but to start off, I'm really interested in kind of your background, why you became interested in this specific field of economic and cultural history, really.

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<v SPEAKER_1>So what brought you to study the history of oil?

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<v SPEAKER_2>Well, I think my interest in oil and energy more generally goes back to my early childhood, as a lot of our interests do.

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<v SPEAKER_2>My grandfather worked for ESSO Canada in Montreal as a kind of white collar worker at the big refinery there.

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<v SPEAKER_2>My mother worked for ESSO as a teenager in her high school summers, and she proudly visited every single ESSO gas station in the province of Quebec as a secret shopper.

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<v SPEAKER_2>So she knew her way around the infrastructure in the province of Quebec.

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<v SPEAKER_2>My other grandfather on my paternal side worked for Cornwall Transit as the chief mechanic for many years.

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<v SPEAKER_2>He had a massive garage, I think it was almost an acre in size, with dozens of historical tractors, classic cars, small engines, lubricants, greases, all of those things.

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<v SPEAKER_2>And for some reason, he let me drive those tractors starting around five years old.

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<v SPEAKER_2>So that kind of really got into my bloodstream, if you will, this idea of the freedom and liberation that motor vehicles could provide.

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<v SPEAKER_2>So I think throughout my childhood, there were lots of stories about the oil industry on the one side of the family, and then lots of physical kind of get your hands dirty kind of work and experience with oil technologies on the other side.

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<v SPEAKER_2>So it was just kind of there in the making of my early years.

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<v SPEAKER_2>And then in high school, I got really actually quite super interested in the age of sail.

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<v SPEAKER_2>Probably too interested, if I'm being honest, I think my parents were probably a little worried about my social life.

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<v SPEAKER_2>But I was just intensely fascinated with how a piece of cloth could be used to catch some wind and really take over the entire world.

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<v SPEAKER_2>So that really drove my interest.

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<v SPEAKER_2>And then once I started in my undergrad at Carleton, I began exploring a little bit closer to our current moment, the transition from sail to steam in the British Royal Navy in the 19th century.

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<v SPEAKER_2>And that's where I really discovered this kind of beautifully complex debate over energy, security, culture, the future, debates from the beginning of the Age of Oil that really reminded me about our own struggles with how that same age would come to an end.

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<v SPEAKER_2>So I was really kind of interested in that idea of energy transitions.

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<v SPEAKER_2>And I was kind of hooked and from ever since then, I've been studying how energy production and consumption shapes our world.

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<v SPEAKER_1>Yeah, well, that's a fantastic way to kind of segue into the first real question for you about the historical basis of our constantly shifting energy system.

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<v SPEAKER_1>And this is one of the most consequential energy transitions in world history, kicked off by the 1913 decision in Britain to transition the Royal Navy from running on domestically produced coal to foreign sources of crude oil.

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<v SPEAKER_1>Now, I'd just like you to kind of sketch out this transition to us.

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<v SPEAKER_1>Were there concerns at the time about the energy security tradeoffs of this transition?

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<v SPEAKER_1>And why did the pro-oil side eventually win out in this debate?

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<v SPEAKER_2>Well, I think this is my longest answer, Joe, and I have quite a bit to discuss here.

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<v SPEAKER_2>I agree with your framing, Joe.

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<v SPEAKER_2>I think the decision to transition the Royal Navy from coal to oil fuel was indeed one of the most consequential moments and decisions in world history, at least modern world history.

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<v SPEAKER_2>And I think if you take a kind of a 30,000 foot level, the decision to transition to oil was really a technical or engineering one.

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<v SPEAKER_2>Oil provided more calories per unit, more calories enabled faster speeds, faster speeds won naval battles, naval supremacy equated to world supremacy, and so on and so forth.

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<v SPEAKER_2>Or at least so they thought.

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<v SPEAKER_2>This was the kind of standard doctrine at the time.

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<v SPEAKER_2>But I think if you zoom in a little bit and look at the transition as it occurred kind of on the ground or at the grassroots, I think the picture really becomes far more complicated, and that's where I find the interest being.

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<v SPEAKER_2>So I think it's something I'm always telling people that I talked to this about, particularly my students, is it's almost impossible, truthfully, to imagine the context in which this decision

was made.

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<v SPEAKER_2>It's true for any historical moment, you can't really understand what it was like to be in the past.

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<v SPEAKER_2>But when it comes to this transition away from coal, we really can't understand how deeply ingrained coal was in daily life in Britain, because there really is no parallel today to the hegemonic presence that coal played.

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<v SPEAKER_2>So I go back to 1910, 1911 was a big year for strikes, 1912, of course.

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<v SPEAKER_2>So 1910, I use as a base year.

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<v SPEAKER_2>And if you go back to this year, you'll see Britain was the world's premier coal producing country.

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<v SPEAKER_2>It had the largest reserves of the best type of maritime steam coal in the world, known as bituminous steam coal from South Wales.

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<v SPEAKER_2>It used this resource to trade with allies, to deny trade to its enemies as a tool of geopolitical, economic, social, and military power.

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<v SPEAKER_2>Coal allowed the Royal Navy to project that power across continents and oceans and basically to rule the world.

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<v SPEAKER_2>Coal mining and trading was Britain's second largest industry, and it employed several millions of people directly and indirectly.

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<v SPEAKER_2>And coal as a resource was Britain's primary export commodity.

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<v SPEAKER_2>So about 10 percent of the total value of the export, but about 80 percent of total volume.

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<v SPEAKER_2>And we could do a whole episode on the shipping aspects of the coal trade, sending out full cargoes, bringing back empty cargoes, whatnot.

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<v SPEAKER_2>But the whole system of Britain's imperial trade was based on coal.

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<v SPEAKER_2>So coal really made Britain rich, powerful, and relevant.

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<v SPEAKER_2>And it made it the world's premier global superpower for about 200 years.

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<v SPEAKER_2>But then something what I see as truly remarkable happened, something I find kind of historically bizarre.

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<v SPEAKER_2>Britain willingly, and like willingly, it did this intentionally, gave up this enormous advantage.

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<v SPEAKER_2>And not only did it give up that advantage, but it traded it for an even more significant and undesirable disadvantage.

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<v SPEAKER_2>So if we go back to 1908, right at the peak of this age of coal, oil is discovered in this corner, kind of a remote corner of southwestern Persia.

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<v SPEAKER_2>This Australian financier who never once stepped foot in Persia, William Knox Darcy, kind of paid for the whole adventure and said out loud a few times that he preferred going to parties than talking about petroleum.

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<v SPEAKER_2>So this is the kind of person who kicked things off, although he had a very capable team of geologists.

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<v SPEAKER_2>A year later, we have the Anglo-Persian Oil Company formed to work those fields, and that would later become Anglo-Iranian and then British Petroleum or BP, which became one of Britain's largest transnational companies or enterprises in its history.

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<v SPEAKER_2>1912, we had the first Lord of the Admiralty, Winston Churchill, who would go on to take up an even more famous role.

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<v SPEAKER_2>He orders a secret Royal Commission on Fuel and Engines to test the feasibility of the transition to oil.

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<v SPEAKER_2>There are zero voices from the coal industry on that committee.

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<v SPEAKER_2>Its main author, a man named John R.

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<v SPEAKER_2>Buthnott Fisher, later wrote to Churchill that all of the committee members had what he called, quote, internal combustion engine rabies.

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<v SPEAKER_2>So that tells you how objective they were.

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<v SPEAKER_2>And completely off-topic, fun fact, I kind of reminded myself when I was digging into my research for this.

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<v SPEAKER_2>John Fisher was the first person to use the acronym OMG in history in a letter he wrote to Churchill about oil in 1917.

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<v SPEAKER_2>So there's kind of a neat popular culture connection there.

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<v SPEAKER_2>Anyway, just continuing on my story, later in 1912, Churchill orders the construction of the first oil-fuelled warships for the Royal Navy based on that commission's findings, including the famous Dreadnought capital ship, which anybody who's interested in naval history would know about.

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<v SPEAKER_2>And those early trials are successful despite the supply being uncertain.

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<v SPEAKER_2>1913 to 1914, the government, the British government purchased 51 percent stake in the Anglo-Persian Oil Company to secure steady supplies for its ships.

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<v SPEAKER_2>And this is a moment I always ask my students and other people I'm chatting with to take stock of what that means, to really stop and think about that.

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<v SPEAKER_2>Churchill, again, surrendered one of history's most impressive advantages, and he gave it up to create this kind of unprecedented link between state and private enterprise that had never been seen in Britain before.

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<v SPEAKER_2>He tied the fortunes of Britain and its premier defensive arm, the Royal Navy, to basically a start-up company with a kind of a party-going playboy as its CEO, with little diplomatic or commercial experience, and operating about 5,500 kilometers away in a foreign country that had practically no diplomatic relationships with the Western world.

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<v SPEAKER_2>And I think you could see echoes to what we're seeing in it today.

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<v SPEAKER_2>And just finishing up on this thought, in doing so and making that switch, which historians have called a fateful plunge and kind of an unknown future, Britain and Churchill and his kind of counterparts, really what I would say is inaugurated this geopolitics of oil.

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<v SPEAKER_2>They kind of created this world of oil that we live in today.

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<v SPEAKER_2>And a few months after that, the Great War began, and the rest, as they say, is history.

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<v SPEAKER_1>Yeah, absolutely.

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<v SPEAKER_1>You know, important to note that during the Great War, well, I suppose these oil-fired naval ships weren't incredibly relevant because it was overwhelmingly a land-based war.

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<v SPEAKER_1>But still, it is a huge moment in the history of energy technology, especially maritime energy technology.

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<v SPEAKER_1>But I suppose there's a question about, like, as much as there is domestic opposition, I suppose.

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<v SPEAKER_1>And I think your master's thesis really goes into a lot of that domestic opposition to this transition.

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<v SPEAKER_1>There is still, like, once you get into World War II, I don't think any country was trying to fight sea battles with steam coal-fired ships.

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<v SPEAKER_1>So it was kind of a bet on, this is a technology that's going to win out anyways, right?

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<v SPEAKER_1>Yeah.

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<v SPEAKER_2>Yeah, absolutely.

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<v SPEAKER_2>They really did kind of bet the farm, to use an analogy.

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<v SPEAKER_2>And there was a lot of, if I may continue on this, there was a lot of dissent against this decision, leading up to the First World War, particularly amongst people who were pro-oil.

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<v SPEAKER_2>And so I think if you look at the kind of two or three years leading up to the war, the histories of those period make it seem like the transition to oil was kind of orderly and predictable and inevitable, kind of a nice straight line of technological progress.

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<v SPEAKER_2>And this is not true at all based on my research.

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<v SPEAKER_2>And it's the same with Churchill.

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<v SPEAKER_2>He was, he's kind of presented as this visionary hero who kind of peered into the future and saw nothing but oil and kind of led his country in that direction.

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<v SPEAKER_2>And I think this is also completely untrue.

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<v SPEAKER_2>And I think if you look at the concerns over this transition to oil, particularly around the secretive commission, the Royal Commission on Fuel and Engines, which I recommend everyone goes and reads, you had somebody like Boverin Redwood himself, who was often called the doyen of oil in this period.

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<v SPEAKER_2>Britain's premier petroleum geologist and the key oil advisor to Churchill and the Royal Navy, warned throughout the early 1900s that oil, it was a useful fuel, but it should only be used in emergencies because coal was Britain's most secure fuel.

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<v SPEAKER_2>JD.

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<v SPEAKER_2>Henry and other oil journalists wrote in 1908 that an island nation would be foolish to hitch its cart to a foreign country when it has no reserves of its own.

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<v SPEAKER_2>Other authors wrote of Britain creating a castration complex for itself.

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<v SPEAKER_2>There are obviously a lot of gender dimensions there.

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<v SPEAKER_2>There were a lot of other scientists that were saying, look, we actually have no clue how much oil is in the world.

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<v SPEAKER_2>Supplies could last for a few years or a few thousand years.

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<v SPEAKER_2>We have no idea.

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<v SPEAKER_2>In fact, they didn't know for most of the interwar period how much oil actually existed.

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<v SPEAKER_2>If you take a step back, the main argument against this transition to oil, it seems really straightforward and clear and common sense.

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<v SPEAKER_2>Britain had the most coal in the world, but literally zero oil within the home islands, like zero.

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<v SPEAKER_2>Even in the entire British Empire, which purported to cover 25 percent of the earth, there was only about one or two percent of the world's known oil in those areas.

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<v SPEAKER_2>It was often called a cruel joke of geography.

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<v SPEAKER_2>In this new age of oil, Britain, despite having a quarter of the world's surface, had practically no oil.

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<v SPEAKER_2>Even the oil it did have was tucked far away in Canada and Burma and whatnot.

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<v SPEAKER_2>I'll just finish on this thought here.

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<v SPEAKER_2>I use this analogy in my second year course when I'm teaching, to give the sense of what the stakes of this decision were.

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<v SPEAKER_2>Imagine growing in your backyard and almost unlimited supply of food, of different variety, different type, really health nutrient rich food, which you use to get rich.

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<v SPEAKER_2>You sell to your neighbors, you build networks within your neighborhood.

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<v SPEAKER_2>People rely on you, you rely on them.

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<v SPEAKER_2>The more you develop your garden, the more food you can grow, the more prestige you acquire.

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<v SPEAKER_2>You become the mayor of your town.

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<v SPEAKER_2>You basically are the most important person in the town.

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<v SPEAKER_2>Then one day, you learn about Instacart and you think, oh wow, it's new, it's easy, it saves time and money.

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<v SPEAKER_2>So you stop growing food in your garden and you begin ordering all your meals on Instacart.

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<v SPEAKER_2>And then you depended on being delivered from another person's house on the other side of town in a neighborhood you never visit.

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<v SPEAKER_2>You change your whole life to revolve around Instacart and Instacart deliveries.

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<v SPEAKER_2>You stay up night worrying about your next meal.

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<v SPEAKER_2>Sometimes the food runs out.

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<v SPEAKER_2>Sometimes other people are stealing the food from you.

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<v SPEAKER_2>Sometimes the Instacart folks shut down the app and say, go away.

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<v SPEAKER_2>And eventually you don't become the mayor and you're completely dependent on Instacart.

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<v SPEAKER_2>I think it sounds like a silly analogy, but that's almost exactly what happened with Britain is they kind of gave up this local homegrown source of energy for a distant foreign unpredictable source.

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<v SPEAKER_1>Yeah, absolutely.

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<v SPEAKER_1>And we'll get into kind of the strategic implications and the question of whether this really was an example of a factor that dragged Britain into this imperial overreach posture.

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<v SPEAKER_1>But first of all, I think it's because of all the reasons you said, you know, it's important to remark that this wider British energy transition didn't happen overnight.

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<v SPEAKER_1>So it is true that coal production peaked, British coal production peaked around, I think, 1913.

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<v SPEAKER_1>But oil only supplanted coal as the largest source of British energy around 1971, I believe.

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<v SPEAKER_1>So that would have been right before the big oil crisis.

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<v SPEAKER_1>So that's kind of a cruel joke on Britain.

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<v SPEAKER_1>And then the last coal fired power station only closed a couple of years ago in 2024.

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<v SPEAKER_1>So I guess a question about how long this energy transition happened.

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<v SPEAKER_1>What real social and economic factors contributed to King Coal's persistence in British energy?

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<v SPEAKER_2>Well, I somewhat disagree here with you, Joe, on the scope and scale of the transition.

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<v SPEAKER_2>I think it really depended on who you were and where you lived and what industry you're in.

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<v SPEAKER_2>So agreed, yes.

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<v SPEAKER_2>If you take the speed of the transition on a broad national or transnational scale, it did take several generations to complete and it was gradual over time.

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<v SPEAKER_2>In fact, if you delve into the energy transition literature, there's an argument that there is no such thing as an energy transition that we're always using all the different types of energy all the time and it just ebbs and flows.

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<v SPEAKER_2>People still use sailboats, people still use coal to heat their home, some folks still ride horses today and what not.

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<v SPEAKER_2>So I think on a big scale, yes, the age of coal, if you will, kind of lingered for longer than you might expect.

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<v SPEAKER_2>But I think if you drill down into the specific use cases and sectors, that's where you see that the speed of the transition really was quite remarkable in certain critical areas.

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<v SPEAKER_2>So I kind of frame it as like, you know, the war between King Coal and Prince Petrolio and that was a common framing back then, King Coal, Prince Petrolio.

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<v SPEAKER_2>The war did take some time and there was several generations, but there were specific battles, kind of instances between those two, that produced some really shocking defeats for Coal.

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<v SPEAKER_2>And these defeats happened within the course of a generation or less.

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<v SPEAKER_2>So I'm looking around 1910 to 1930 period.

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<v SPEAKER_2>So in that time frame, motor vehicles appeared almost overnight, car ownership skyrocketed in the US or in the UK, sorry, and elsewhere.

00:17:34.733 --> 00:17:44.693

<v SPEAKER_2>Streets became clogged, traffic conventions were established, traffic lights, traffic stops, infrastructure was developed, roads and gas stations and car washes and bridges.

00:17:45.433 --> 00:17:49.493

<v SPEAKER_2>And so all of that really exploded within, let's say, a 10 year period.

00:17:49.493 --> 00:17:53.133

<v SPEAKER_2>So in that sense, kind of the Age of Oil came quite fast.

00:17:54.273 --> 00:17:57.453

<v SPEAKER_2>Arguably even faster was in the maritime transportation side.

00:17:57.893 --> 00:18:04.373

<v SPEAKER_2>So that's everything from merchant marines to Navy, naval ships, almost overnight, it seems.

00:18:04.373 --> 00:18:09.973

<v SPEAKER_2>Switched from steam, coal and sails to oil, broilers and eventually diesel internal combustion engines.

00:18:10.653 --> 00:18:21.913

<v SPEAKER_2>The same was in the railways in particular in the UK, but also areas like, for example, Mexico shifted all of its national railways from coal to oil in one day.

00:18:22.613 --> 00:18:25.473

<v SPEAKER_2>They switched over kind of in one flip of the switch.

00:18:26.493 --> 00:18:41.133

<v SPEAKER_2>And you also saw like new technologies explode, airplanes and other kind of aircraft emerging that kind of reshaped military doctrines and international geopolitics overnight, and made people feel like the entire world had changed with just one invention.

00:18:41.313 --> 00:18:49.053

<v SPEAKER_2>And I think if you dig even further down into kind of day to day use, you see the transition happening really remarkably fast.

00:18:49.053 --> 00:18:58.293

<v SPEAKER_2>So applications like lighting and illumination just almost became gasified or hydrocarbon fuel overnight.

00:18:58.813 --> 00:19:03.473

<v SPEAKER_2>Lubricants and greases for industrial uses basically were replaced overnight with oil.

00:19:04.453 --> 00:19:25.953

<v SPEAKER_2>And even just one of my favorite examples of kind of the daily toil that this transition took on people is there's a famous case in Wales, South Wales coal fields, where the miners in the early 1930s walked off their job when they discovered that their daily meals that were provided by the coal company were being baked with imported foreign oil.

00:19:27.113 --> 00:19:28.793

<v SPEAKER_2>So and that just enraged them.

00:19:29.173 --> 00:19:35.433

<v SPEAKER_2>So and now at the same time as you see this rise of oil, you also saw the complete and almost utter collapse of coal.

00:19:35.433 --> 00:19:52.193

<v SPEAKER_2>So you saw millions of unemployed miners, especially in South Wales, but in other areas, poverty, you saw mines closing, you saw entire towns abandoned, you saw civil unrest, alcoholism, gambling, really like social collapse in a lot of these areas and all within kind of a generation or two.

00:19:53.273 --> 00:19:59.133

<v SPEAKER_2>And these folks were all saying and they argued quite loudly that the transition oil was happening too fast and too recklessly.

00:19:59.833 --> 00:20:02.073

<v SPEAKER_2>And to be honest, many of them were right.

00:20:02.513 --> 00:20:06.973

<v SPEAKER_2>The situation in South Wales is still difficult because of those years of depression.

00:20:07.333 --> 00:20:08.193

<v SPEAKER_1>Yeah, yeah.

00:20:08.273 --> 00:20:42.713

<v SPEAKER_1>So you can really see how this technological change and the building up all the infrastructure around it and kind of allowing this to go in that direction and have disruptions not only to people's, of course, people's daily lives, especially those who had their lives mapped up in kind of previous technologies or in kind of incumbent technologies, but also there's huge strategic implications for what you're becoming committed to, what you need to do in order to maintain these new kind of standards of living that your citizens are expecting of you.

00:20:43.073 --> 00:20:50.333

<v SPEAKER_1>And yeah, so I think that we can kind of talk about like the Imperial overstretch thesis here a little bit.

00:20:50.353 --> 00:20:55.253

<v SPEAKER_1>And I think that this is starting to get into some implications for where we are today.

00:20:55.733 --> 00:21:00.633

<v SPEAKER_1>So this switched oil, of course, dramatically changed British strategic posture.

00:21:01.733 --> 00:21:09.913

<v SPEAKER_1>And this forced the country to protect its supplies of foreign oil, like you said earlier, having to suddenly worry about what Instacart was going to do for you.

00:21:10.773 --> 00:21:19.693

<v SPEAKER_1>And so this involved the establishment of oil companies backed by the British state, like you said, you know, the Anglo-Iranian Oil Company, and then eventually BP.

00:21:20.653 --> 00:21:25.393

<v SPEAKER_1>And then there's also Britain's actions around the breakup of the Ottoman Empire.

00:21:25.393 --> 00:21:36.893

<v SPEAKER_1>I think that was potentially shaped by energy security considerations, as well as dominance over critical waterways, like of course, the Strait of Hormuz, but I think more importantly for Britain, the Suez Canal.

00:21:38.213 --> 00:21:47.513

<v SPEAKER_1>So could we see this deep involvement in the Middle East as a possible example of this kind of imperial overstretch of the British government?

00:21:47.633 --> 00:21:49.733

<v SPEAKER_1>Do you think that there's more subtlety here?

00:21:51.433 --> 00:21:53.153

<v SPEAKER_2>I think the answer is yes to both.

00:21:54.273 --> 00:22:00.713

<v SPEAKER_2>My short answer is that I personally think that all acts of imperialism or foreign meddling should be viewed as overstretch.

00:22:01.613 --> 00:22:08.173

<v SPEAKER_2>I don't see there really being any space for kind of appropriate or measured imperialism, especially when it comes to natural resources.

00:22:08.173 --> 00:22:15.953

<v SPEAKER_2>I think anytime a state decides to go beyond its borders to secure a supply of energy, they are engaging in imperial overstretch.

00:22:16.913 --> 00:22:32.993

<v SPEAKER_2>I often quote Edward Said's Orientalism here, his 1970s book where he wrote, always there lurks the assumption that although the Western consumer belongs to a numerical minority, he is entitled either to own or to expend or both the majority of the world's resources.

00:22:33.913 --> 00:22:39.653

<v SPEAKER_2>You see it kind of there's tongue in cheek phrases all throughout kind of oil history is, how did our oil end up under their

soil?

00:22:40.933 --> 00:22:47.033

<v SPEAKER_2>This kind of idea that Said was pointing to is that, if there's oil out there, we'll get it and it'll be ours.

00:22:47.033 --> 00:22:51.953

<v SPEAKER_2>I think that's the key, that's kind of the original sin of the age of oil.

00:22:52.733 --> 00:23:03.633

<v SPEAKER_2>But I think the longer answer here is that, it's really the First World War is, I think this moment when Britain's Imperial Project of Oil, their kind of experiment was tested and failed miserably.

00:23:03.973 --> 00:23:09.593

<v SPEAKER_2>I think it's the First World War and to some extent, the Second World War where we can really draw the most number of lessons for our current moment.

00:23:10.253 --> 00:23:13.333

<v SPEAKER_2>We could probably spend an entire episode on the First World War, I'd be happy to do so.

00:23:13.893 --> 00:23:17.273

<v SPEAKER_2>But let's just say for the Royal Navy, it was an absolute disaster.

00:23:18.053 --> 00:23:22.093

<v SPEAKER_2>Oil did not provide the strategic and tactical advantages that were promised.

00:23:22.573 --> 00:23:29.373

<v SPEAKER_2>There were no decisive naval battles during the war, which was the entire premise of transitioning to oil in the first place, was naval supremacy.

00:23:30.053 --> 00:23:47.973

<v SPEAKER_2>Oil tankers were sunk in the thousands or tens of thousands by U-boats, German U-boats, and a big part of the Allied war effort was diverting and securing far-flung oil supplies in hostile seas that once were ruled unopposed by the British Royal Navy on coal, so a complete inversion of the security set up there.

00:23:48.493 --> 00:24:00.913

<v SPEAKER_2>British warships had to sail at half speed during the Second World War to save fuel because there wasn't enough oil, and remember the main goal of switching to oil was increased speed, so here you have British warships sailing at half speed.

00:24:01.433 --> 00:24:07.033

<v SPEAKER_2>Millions of miners were unemployed and impoverished, which led to a huge, huge problem.

00:24:07.033 --> 00:24:12.393

<v SPEAKER_2>I could even argue that it created crises in the 1920s with Ireland.

00:24:12.533 --> 00:24:16.753

<v SPEAKER_2>There was issues with Scotland, Wales and Ireland, all because of this depressed coal industry.

00:24:18.053 --> 00:24:26.213

<v SPEAKER_2>You had really weird episodes in the First World War where they were dumping quality steam coal into the sea just to keep prices from collapsing.

00:24:26.953 --> 00:24:38.333

<v SPEAKER_2>Again, imagine Britain in the mid 1800s being told that one day you'll be completely reliant on oil from Persia and you're going to be dumping your best British steam coal into the ocean.

00:24:38.333 --> 00:24:44.893

<v SPEAKER_2>By the end of the war, you could argue that Britain had lost its status as a global hegemon and a multipolar world had emerged.

00:24:45.013 --> 00:24:53.313

<v SPEAKER_2>If you draw the line back, there's many different reasons why this happened, but one of the main catalysts, if you will, was the transition to oil.

00:24:54.593 --> 00:24:57.273

<v SPEAKER_2>I think it's the debates after the war.

00:24:57.453 --> 00:25:01.433

<v SPEAKER_2>That's when people in Britain had a moment to say, okay, we tried this experiment.

00:25:01.553 --> 00:25:02.993

<v SPEAKER_2>We've just had a major war.

00:25:03.193 --> 00:25:05.433

<v SPEAKER_2>A lot of people call it the First World Oil War.

00:25:07.153 --> 00:25:07.873

<v SPEAKER_2>Where are we?

00:25:08.133 --> 00:25:11.393

<v SPEAKER_2>It's in the 1920s that I find the debates most interesting.

00:25:11.393 --> 00:25:25.173

<v SPEAKER_2>Again, you turn there and you see that even the most ardent proponents of oil were some of the loudest yelling almost that we really need to rethink where we're going if we're going to be completely dependent on foreign oil.

00:25:26.173 --> 00:25:36.993

<v SPEAKER_2>For example, you have the Chairman of the Navy League, one of the most important commentators of the time in 1919, saying that the oil issue was an economic crisis far greater than any in Britain's history.

00:25:37.973 --> 00:25:41.953

<v SPEAKER_2>He said that oil menaces Britain's very existence as a seafaring nation.

00:25:43.013 --> 00:25:45.993

<v SPEAKER_2>He says, instead of increased wages, there will be no wages at all.

00:25:46.833 --> 00:25:49.573

<v SPEAKER_2>And throughout the 20s, there's a string of books.

00:25:49.933 --> 00:26:03.893

<v SPEAKER_2>Maybe I can send you the list for kind of for further reading, but you have 1922, Oil's Influence on Politics, 1924, The Black Golconda, 1926, The Great Oil War, 1934, Merchants of Death, 1935, The Secret War for Oil.

00:26:04.993 --> 00:26:09.613

<v SPEAKER_2>And these were all people that were pro-oil at one point, that had kind of become disillusioned.

00:26:09.953 --> 00:26:21.153

<v SPEAKER_2>Now, if my subject of my master's thesis, and to some extent, my PhD research was the anti-oil voices from South Wales, the coal fields in South Wales.

00:26:21.293 --> 00:26:43.873

<v SPEAKER_2>And I mean, we could again go on and on, but I think let's just say that people in that area were absolutely enraged that their traditional way of life and their long-standing service to the nation had been sold out to what they saw as a far-flung country on the edge of the world, simply for the lure of what one of the more vocal commentators said, the lure of a few extra knots of speed.

00:26:45.373 --> 00:26:56.593

<v SPEAKER_2>So you had somebody like Royal Navy Captain Bernard Ackworth, really fascinating person, had a lot of kind of flaws, let's say, but his writing on oil were quite interesting.

00:26:57.073 --> 00:27:02.593

<v SPEAKER_2>He wrote a famous article called In Bondage to Oil, another famous book called The Great Delusion.

00:27:02.693 --> 00:27:08.133

<v SPEAKER_2>Again, talking about this almost insanity that people were feeling towards oil.

00:27:09.873 --> 00:27:13.533

<v SPEAKER_2>In fact, Ackworth harassed Churchill so much.

00:27:14.013 --> 00:27:32.373

<v SPEAKER_2>He harassed him all through the 1920s and 30s in his writings, that Churchill actually put out a newspaper ad in 1942 with Ackworth's photo and said, arrest this man for sedition because he was complaining too much about the foolish decisions to switch to oil.

00:27:33.473 --> 00:27:43.233

<v SPEAKER_2>That episode in my mind shows that Churchill knew he was wrong and that over all these years the thorn in his side had come to be correct.

00:27:44.933 --> 00:27:46.633

<v SPEAKER_2>There's a few other great examples that you could look into.

00:27:46.773 --> 00:27:59.333

<v SPEAKER_2>There's this movement called the Back to Coal Movement, which I am really fascinated because it's a reverse energy transition movement, which you could argue we're seeing in some extents today.

00:27:59.773 --> 00:28:09.673

<v SPEAKER_2>Then there was the Coal Utilization Council, which in the 1930s really helped provide this practical advice for Britons to use cheap coal during the Depression instead of foreign oil.

00:28:09.953 --> 00:28:19.773

<v SPEAKER_2>All sorts of interesting ways of looking and understanding oil in that period from that movement.

00:28:19.833 --> 00:28:30.453

<v SPEAKER_2>And just quickly here, what I think really fascinates me in this British anti-oil movement is what's so remarkable is that it really united groups that had never been allies before.

00:28:30.753 --> 00:28:44.433

<v SPEAKER_2>So miners and mine owners, labor unions and industrial associations, city and country folk, the Celtic Fringe and this English Metropole were collaborating, the working class and the business class, men and women.

00:28:44.433 --> 00:28:49.113

<v SPEAKER_2>It really was a kind of a broad, big tent movement.

00:28:49.173 --> 00:29:07.073

<v SPEAKER_2>What they all shared was this deep concern for what would be lost in the transition of oil, the loss of history, the loss of culture, the loss of heritage, the loss of security, of prestige, of wealth, and this deeper suspicion for what would be gained, a few extra knots perhaps, but also dependency, insecurity, corruption.

00:29:07.453 --> 00:29:10.273

<v SPEAKER_2>There was a big fear about globalization.

00:29:10.273 --> 00:29:16.553

<v SPEAKER_2>I think you can see so many parallels, direct parallels to what we're seeing out today with the war in Iran.

00:29:16.553 --> 00:29:34.953

<v SPEAKER_2>New coalitions of people resisting the war, concerns about security and transparency and who is actually involved in making these decisions, concerns about the loss of American prestige and its hegemonic status, and maybe perhaps on a deeper level, concerns about the potential new world order emerging that is not as advantageous as the last.

00:29:35.473 --> 00:29:39.973

<v SPEAKER_2>And I think that's causing a lot of people to feel uneasy about what could be next.

00:29:40.313 --> 00:29:40.913

<v SPEAKER_1>Yeah, yeah.

00:29:41.153 --> 00:29:46.253

<v SPEAKER_1>And there's kind of parallel conversations up here in Canada, too, around energy transition and the social impacts of it.

00:29:47.093 --> 00:29:50.773

<v SPEAKER_1>Kind of the balance of power between certain parts of the country.

00:29:51.333 --> 00:29:55.833

<v SPEAKER_1>That's something that I think is important to remark on a little bit.

00:29:56.093 --> 00:30:05.453

<v SPEAKER_1>But just to stick with kind of the point here about UK's dependence on foreign sources of oil, and this is especially kind of in the interwar period.

00:30:06.293 --> 00:30:32.953

<v SPEAKER_1>You know, so up until the end of World War II, of course, there was oil supplies in the Middle East, but by far the United States was the largest supplier of crude oil for all of the time up until, I think, a decade or two after the Second World War, just because there's enormous oil fields, of course, Pennsylvania first and that area, but then down in Texas, just enormous supplies of oil, California as well.

00:30:34.333 --> 00:30:40.453

<v SPEAKER_1>The United States wasn't a British ally in World War I, and would eventually be a British ally again in World War II.

00:30:41.433 --> 00:30:49.093

<v SPEAKER_1>And yet, we did see Britain looking for oil in the Middle East rather than just importing from the United States.

00:30:49.093 --> 00:31:01.793

<v SPEAKER_1>So I guess my question for you is why did the UK, why did Britain decide that they wanted to develop oil in an uncertain supply situation in the Middle East rather than just importing across the Atlantic?

00:31:02.853 --> 00:31:04.253

<v SPEAKER_2>I think this is a great question, Joe.

00:31:04.553 --> 00:31:07.153

<v SPEAKER_2>And we see that question being asked a lot today.

00:31:07.513 --> 00:31:10.513

<v SPEAKER_2>If the Hormuz is shut down, why don't we just bring in oil from somewhere else?

00:31:10.513 --> 00:31:13.773

<v SPEAKER_2>Or now that Venezuela's oil is online, why don't we just bring that oil in?

00:31:14.533 --> 00:31:21.193

<v SPEAKER_2>And I think once again, I really see culture here as playing an outsized role over the economic or business factors.

00:31:21.953 --> 00:31:30.833

<v SPEAKER_2>I think the strongest point against the UK buying oil from the US during this period is imperial prestige, which is de facto a cultural phenomenon.

00:31:31.733 --> 00:31:36.993

<v SPEAKER_2>Britain did not want to rely on the US for its economic and military success, point blank.

00:31:37.393 --> 00:31:46.313

<v SPEAKER_2>They were the world's leading superpower and the idea of relying on the next younger power.

00:31:46.873 --> 00:31:48.553

<v SPEAKER_2>It was just completely unthinkable.

00:31:48.833 --> 00:31:55.853

<v SPEAKER_2>So the US was an ally, but it was also more seen as a competitor and a rival, both economically and militarily.

00:31:56.753 --> 00:32:06.253

<v SPEAKER_2>I think a lot of decision-makers in the UK thought it's much better to rely on a weak, essentially feudalistic Persia or Iran, rather than kind of chief rival.

00:32:07.053 --> 00:32:17.413

<v SPEAKER_2>British and US oil companies in particular were engaged in this desperate fight for global oil resources during the 1920s, in particular, as kind of a new scramble for territory playing across the world.

00:32:17.853 --> 00:32:22.913

<v SPEAKER_2>So those companies were direct competitors, and their governments were their greatest supporters.

00:32:22.933 --> 00:32:30.873

<v SPEAKER_2>So the idea of collusion or collaboration just wasn't even an option on the table during this period.

00:32:30.873 --> 00:32:35.693

<v SPEAKER_2>I think another important factor is that US consumption was also very high, domestic consumption.

00:32:35.693 --> 00:32:42.473

<v SPEAKER_2>So they didn't want to or need to sell much oil beyond their domestic markets because of the just phenomenal growth of the country at the time.

00:32:43.433 --> 00:32:48.673

<v SPEAKER_2>Another important aspect is that Persian oil was in many ways superior to most US oil.

00:32:49.133 --> 00:32:50.013

<v SPEAKER_2>It was abundant.

00:32:50.013 --> 00:32:50.873
<v SPEAKER_2>It was free flowing.

00:32:50.873 --> 00:32:51.793
<v SPEAKER_2>It was close to sea.

00:32:51.793 --> 00:32:53.213
<v SPEAKER_2>It was a very high grade.

00:32:54.073 --> 00:32:56.473
<v SPEAKER_2>It was kind of easy to get and easy to use.

00:32:56.473 --> 00:33:01.413
<v SPEAKER_2>And the whole UK refinery infrastructure was designed for imported Persian oil.

00:33:01.413 --> 00:33:02.873
<v SPEAKER_2>And it was difficult to switch.

00:33:02.913 --> 00:33:06.573
<v SPEAKER_2>And you see that today refineries can't just switch to different grades.

00:33:07.793 --> 00:33:11.993
<v SPEAKER_2>The whole infrastructure is really designed for a specific source or sources.

00:33:13.133 --> 00:33:18.193
<v SPEAKER_2>So yeah, the idea of Britain working with the United States was just completely off the table.

00:33:18.193 --> 00:33:22.733
<v SPEAKER_2>And instead, they actually doubled or redoubled their efforts to find oil within the empire.

00:33:22.733 --> 00:33:28.733
<v SPEAKER_2>So that's we saw these intense searches in Ontario in the early 1910s and 20s in Alberta.

00:33:29.393 --> 00:33:39.073
<v SPEAKER_2>Same period around Northwest Territories and then more far-flung parts of the empire like Burma, New Zealand, Belize, and then kind of non-aligned places like Venezuela, Mexico, and Russia.

00:33:40.413 --> 00:33:49.733
<v SPEAKER_2>So again, the market is integrated, and it's kind of a tightly woven knot, but there still are kind of spheres of influence.

00:33:49.733 --> 00:33:57.013
<v SPEAKER_2>And you see them today even, the legacies of these

spheres of influence and very little crossover in those realms.

00:33:57.373 --> 00:33:58.513

<v SPEAKER_1>Yeah, it is very interesting.

00:33:58.513 --> 00:34:06.673

<v SPEAKER_1>You know, if you read a book like The Prize, where you have these kind of different national champions, I guess, effectively, these are private companies.

00:34:06.813 --> 00:34:30.233

<v SPEAKER_1>They're not technically owned by their national governments, but their operations are very much, I guess, I suppose aligned with the national interests as set by the government in power at the time for like Total in France, ENI in Italy, of course, BP in Shell in the UK, and I suppose Netherlands, and then all of the American super majors.

00:34:30.393 --> 00:34:30.813

<v SPEAKER_2>Yeah.

00:34:30.933 --> 00:34:31.153

<v SPEAKER_2>Yeah.

00:34:31.153 --> 00:34:35.053

<v SPEAKER_2>You could argue that oil companies are kind of subnational entities.

00:34:35.533 --> 00:34:41.073

<v SPEAKER_2>Depending on your perspective, you could argue they're supranational entities that are actually above the levels of state.

00:34:41.073 --> 00:34:48.373

<v SPEAKER_2>But if you look at APOC, I mean, the UK government had owned 51 percent of the company and had two permanent directors on the board.

00:34:51.953 --> 00:34:53.493

<v SPEAKER_2>That's not a private company anymore.

00:34:55.193 --> 00:35:01.753

<v SPEAKER_2>Those companies were very closely aligned to the state and state projection of power.

00:35:03.973 --> 00:35:16.793

<v SPEAKER_2>Again, a little off-tropic here, but I think you could argue that the transition in imperialism went from state and government imperialism, and the baton was passed to corporate or commercial imperialism.

00:35:17.513 --> 00:35:21.893

<v SPEAKER_2>You see that with oil companies in Saudi Arabia for the US and Persia.

00:35:22.233 --> 00:35:31.433

<v SPEAKER_2>This idea of commercial conquest and commercial imperialism took over from more traditional state-led imperialism.

00:35:31.653 --> 00:35:46.233

<v SPEAKER_1>Yeah, I suppose my worry is that we just had a brief moment where we had this globalization and kind of abandoning the idea that these corporations are supposed to also be acting within the national interest of their mother country, I suppose.

00:35:46.493 --> 00:35:57.013

<v SPEAKER_1>And that was a brief moment in time where we had a bit more international cooperation and not worrying about the interests of organizations that are based in other countries.

00:35:57.493 --> 00:36:01.993

<v SPEAKER_1>And I suppose my concern is with the resumption of great power competition.

00:36:02.853 --> 00:36:09.153

<v SPEAKER_1>You know, after World War II, the Soviet Union, it's not like they had a bunch of companies going around looking to establish themselves elsewhere.

00:36:09.153 --> 00:36:10.293

<v SPEAKER_1>So you didn't have to worry about that.

00:36:10.293 --> 00:36:20.273

<v SPEAKER_1>But now we have Chinese companies and American companies which have, which could be aligned with the national interest of their own countries, I suppose.

00:36:20.273 --> 00:36:21.973

<v SPEAKER_1>And then that's certainly.

00:36:21.973 --> 00:36:22.173

<v SPEAKER_2>Yeah.

00:36:22.173 --> 00:36:23.413

<v SPEAKER_2>Well, you see it in Canada.

00:36:23.413 --> 00:36:31.833

<v SPEAKER_2>You see Chinese companies like Nexus and CNUK having a larger presence, but also people getting nervous about that.

00:36:31.833 --> 00:36:37.933

<v SPEAKER_2>And it's not because of the financial side, it's because of the political and diplomatic implications of that.

00:36:37.933 --> 00:36:41.853

<v SPEAKER_2>So yeah, I think we're barreling towards a new multipolar world.

00:36:42.033 --> 00:36:42.753

<v SPEAKER_1>Yeah.

00:36:42.753 --> 00:36:51.633

<v SPEAKER_1>I'm not necessarily saying that these companies are in some way untrustworthy of the people who are working for them are, because I know people who work for various internationally based companies.

00:36:51.633 --> 00:37:05.653

<v SPEAKER_1>But certainly, yeah, it's just that, you know, I suppose my concern is that we're really exiting out of this globalization world, while also having all of the infrastructure from a world of globalization and mutual trust.

00:37:05.993 --> 00:37:11.773

<v SPEAKER_1>And so now we have, we're all dependent on each other, but none of us trust each other, which is a tough situation to be in.

00:37:11.993 --> 00:37:12.413

<v SPEAKER_2>Yes.

00:37:13.333 --> 00:37:19.573

<v SPEAKER_1>So it kind of is a final thought, and excuse me for going a little bit of a spiel here.

00:37:19.573 --> 00:37:21.593

<v SPEAKER_1>Let's just turn a little bit to the modern day.

00:37:21.593 --> 00:37:42.713

<v SPEAKER_1>So following World War II and then also the Suez Crisis, so in the 1950s, Britain getting kind of kicked out of Britain, France and Israel really getting kicked out of Suez, the United States took on the mantle of maritime dominance, including acting as a guarantor of maritime security in the Middle East.

00:37:43.073 --> 00:37:45.973

<v SPEAKER_1>However, it seems to me that this guarantee has really slipped.

00:37:46.753 --> 00:37:57.133

<v SPEAKER_1>So the Strait of Hormuz economic lifeline for world energy has been effectively closed for now two and a half months

because of US and Israeli attacks on Iran.

00:37:58.273 --> 00:38:03.053

<v SPEAKER_1>So some people have framed this as a possible Suez moment for the United States.

00:38:03.673 --> 00:38:13.093

<v SPEAKER_1>This mirrors Britain's fall from being the guarantor of maritime security and then having this global empire that goes along with that.

00:38:13.753 --> 00:38:15.873

<v SPEAKER_1>But others have disputed this characterization.

00:38:16.033 --> 00:38:19.533

<v SPEAKER_1>They've said that the US doesn't depend as much on maritime trade as Britain did.

00:38:19.533 --> 00:38:21.873

<v SPEAKER_1>So US of course has its own oil supplies.

00:38:23.313 --> 00:38:33.133

<v SPEAKER_1>Increasingly so with the shale revolution and also with the development of Canadian oil reserves, which is a much more secure form of energy than Britain and Iran, of course.

00:38:33.693 --> 00:38:40.833

<v SPEAKER_1>Furthermore, really no country is really stepping up seemingly to take on the mantle of guarantee of international maritime commerce.

00:38:40.833 --> 00:38:45.853

<v SPEAKER_1>I don't have any sense that China is going to be trying to take on this role.

00:38:45.993 --> 00:38:48.053

<v SPEAKER_1>They seem to be much more standoffish.

00:38:48.533 --> 00:39:03.893

<v SPEAKER_1>So I suppose, what is your view from the perspective of oil history, of what this moment could, I suppose, parallel the Suez Crisis or I suppose, this is a whole new phase of history, but I guess, what are the historical parallels to this?

00:39:04.733 --> 00:39:10.133

<v SPEAKER_2>Yeah, I think history repeats itself, but in a different context and time.

00:39:10.133 --> 00:39:14.773

<v SPEAKER_2>So we see a lot of trends and patterns over time.

00:39:17.173 --> 00:39:22.393

<v SPEAKER_2>As a historian, I'm always more comfortable, I should say, looking back in time than forward.

00:39:22.773 --> 00:39:34.733

<v SPEAKER_2>But I do play this kind of game, where I pretend I'm a historian 100 years from now, and imagine how they would look back on this particular moment, and reflect and assess our current situation.

00:39:34.733 --> 00:39:48.933

<v SPEAKER_2>In short, similar to the way the historians have written about Suez, and other crises in global geopolitics, I think historians will write a damning indictment of how the US and its allies have handled the situation in Iran.

00:39:49.193 --> 00:39:55.873

<v SPEAKER_2>I do believe they'll conclude that we've seen in recent weeks the kind of seeds planted for a new post-Hormuz world order.

00:39:57.153 --> 00:40:07.853

<v SPEAKER_2>I have no doubt that you'll see in probably a few years, if not a little bit longer, books just simply titled Hormuz, where this is the moment that kind of everything was seen to have changed.

00:40:08.633 --> 00:40:24.053

<v SPEAKER_2>So yes, I do see this conflict as a major watershed moment in the American Imperial Project, similar to how the British Imperial Project stumbled and faltered on this one key component of being dependent on foreign or overseas oil.

00:40:25.313 --> 00:40:35.913

<v SPEAKER_2>I do see it as being surprisingly familiar, kind of sequel to the first movie, if you will, the movie where Britain lost its empire because of its self-harming relationship with Iran's oil.

00:40:36.733 --> 00:40:41.553

<v SPEAKER_2>And I think we're basically in Episode 2 of that, we've seen that film before.

00:40:42.373 --> 00:40:47.873

<v SPEAKER_2>So yes, the world has changed and the actors are different, but the strategic dilemma has remained the same.

00:40:48.333 --> 00:40:57.533

<v SPEAKER_2>And we're seeing this asymmetrical use of power to completely cripple and in fact, perhaps even topple the world's leading superpowers.

00:40:57.533 --> 00:41:04.353

<v SPEAKER_2>So that would have made sense to a commentator in 1912 and 1922 and 1932.

00:41:04.353 --> 00:41:14.453

<v SPEAKER_2>So none of this should be surprising, but it seems like we're kind of, the wheel has turned again and here we are in the same position, kind of watching in slow motion an imperial decline.

00:41:15.473 --> 00:41:24.253

<v SPEAKER_2>Now, you could argue that Britain's imperial decline and perhaps even the American kind of imperial tarnishing, let's say, was really complex.

00:41:24.253 --> 00:41:27.233

<v SPEAKER_2>There's so many factors involved and oil is just one of them.

00:41:27.953 --> 00:41:36.993

<v SPEAKER_2>But the US's and to some extent, Israel's adventure in Iran right now is doing the same things that were happening in the 1920s and 30s.

00:41:37.173 --> 00:41:48.513

<v SPEAKER_2>There's power relationships being redrawn, permanent hegemony or seemingly permanent hegemony being displaced, the global economy being completely turned upside down.

00:41:51.353 --> 00:42:01.433

<v SPEAKER_2>Again, to use an analogy that I often share with my students is that Britain really spent two centuries drawing a map of the world and its own image on an Etch A Sketch.

00:42:02.993 --> 00:42:09.333

<v SPEAKER_2>In 1913 or thereabouts, they just decided to shake it and restart and redraw it.

00:42:10.593 --> 00:42:12.053

<v SPEAKER_2>We saw the consequences of that.

00:42:12.233 --> 00:42:14.353

<v SPEAKER_2>They lost out to other powers.

00:42:14.453 --> 00:42:17.473

<v SPEAKER_2>I think we could argue we're seeing that again play out here.

00:42:17.693 --> 00:42:25.613

<v SPEAKER_2>The US and the Western world, I would argue is actually more dependent on Persian oil than Britain was in the 1910s or 20s or 30s.

00:42:26.193 --> 00:42:38.993

<v SPEAKER_2>Because the US position today is more where the economy is more globalized, it's more integrated, and there's less self-sufficiency within national economies.

00:42:40.293 --> 00:42:46.433

<v SPEAKER_2>Just like the UK, I see the US being shown to the whole world as being vulnerable to asymmetric attacks.

00:42:47.113 --> 00:42:55.973

<v SPEAKER_2>The same vulnerability that led people to sabotage and blow up Anglo-Persian oil refineries and pipelines in the Middle East in the 1920s.

00:42:56.273 --> 00:43:07.053

<v SPEAKER_2>The same vulnerability that led basically every Shah, who's been the Shah of Persia over time, to kick out either the Brits or the Europeans and try to wrest control of their oil.

00:43:07.853 --> 00:43:16.953

<v SPEAKER_2>That same vulnerability that convinced the Germans in World War I and World War II to focus almost exclusively on sinking oil tankers, Britain's oil tankers, very successfully, I should add.

00:43:18.493 --> 00:43:35.213

<v SPEAKER_2>This sense that the entire world is being built on this impossibly thin thread of massive ships lumbering across our oceans, and that the entire daily life of every human on earth is really being driven by a handful of petrostates.

00:43:36.173 --> 00:43:39.293

<v SPEAKER_2>The majority of them are either bad actors or at best, competitors.

00:43:40.593 --> 00:43:49.553

<v SPEAKER_2>As a historian, I just can't help but feel like we're just going back into the exact same quagmire that Britain found itself in the 1920s and 30s.

00:43:50.033 --> 00:43:55.973

<v SPEAKER_2>We're not talking about the 1400s or the 1500s, we're talking about three or four generations ago.

00:43:57.293 --> 00:43:59.573

<v SPEAKER_2>The lessons seem to have been lost.

00:44:00.093 --> 00:44:18.533

<v SPEAKER_2>I think if you take the specific case, specific circumstances of Hormuz and Oil and the details, and you place those

on the more macro trends that we're seeing across the world, you can really then start to see a portrait of collapse very similar to what the British Empire is facing.

00:44:18.533 --> 00:44:49.613

<v SPEAKER_2>New military doctrines redrawing things, new alliances between superpowers, new rifts with allies, economic uncertainty and depression, social anxiety, rapid social change, changing cultural practices, this rise of middle powers with the potential to tilt the balance and be kingmakers, Ella Marcarni, this fading the hegemon's prestige and reputation, the rise of nationalism, autarky, isolationism, militarism, plagues, famines, climate change.

00:44:50.653 --> 00:44:52.813

<v SPEAKER_2>The list goes on and on.

00:44:52.953 --> 00:45:06.273

<v SPEAKER_2>I think if you were to place a basic intro history to the 1930s, lay that over our current moment, I think you'd be shocked to see how many similarities there are.

00:45:06.433 --> 00:45:08.473

<v SPEAKER_2>It shocks me and it concerns me very much.

00:45:08.653 --> 00:45:12.853

<v SPEAKER_1>Yeah, that concerns me a great deal too, because we all know what the 30s led to.

00:45:13.713 --> 00:45:14.473

<v SPEAKER_1>Exactly.

00:45:14.493 --> 00:45:18.953

<v SPEAKER_1>Yeah, it reminds me of that old saying, those who don't know history are doomed to repeat it, right?

00:45:19.133 --> 00:45:19.933

<v SPEAKER_2>Exactly.

00:45:20.013 --> 00:45:34.573

<v SPEAKER_1>Yeah, I have a feeling that quite a few of the people in power, in various important positions of power, are not very close students of history, I suppose, and especially down in Washington DC.

00:45:34.973 --> 00:45:35.833

<v SPEAKER_2>You got it.

00:45:35.833 --> 00:45:37.013

<v SPEAKER_1>Very unfortunate.

00:45:38.573 --> 00:45:42.093

<v SPEAKER_1>Yeah, that's of course very concerning, but fantastic overview.

00:45:42.093 --> 00:45:44.633

<v SPEAKER_1>Thank you so much, Ian, for coming on.

00:45:45.033 --> 00:45:46.333

<v SPEAKER_1>We always have one last question.

00:45:46.333 --> 00:45:49.353

<v SPEAKER_1>I'm sure you'll have some really great recommendations here.

00:45:49.753 --> 00:45:54.313

<v SPEAKER_1>What is a book that you'd like to recommend to our audience?

00:45:54.313 --> 00:46:03.253

<v SPEAKER_2>It's a great question, Joe, and I always love that further reading, so it would be impossible for me to pick just one, so I have three different ones.

00:46:03.253 --> 00:46:10.033

<v SPEAKER_2>For a high-level system-wide view of the development of the international industry, I always recommend Timothy Mitchell's Carbon Democracy.

00:46:10.293 --> 00:46:11.493

<v SPEAKER_2>Truly, it's indispensable.

00:46:11.493 --> 00:46:12.533

<v SPEAKER_2>I think everyone should read it.

00:46:13.693 --> 00:46:25.793

<v SPEAKER_2>For an on-the-ground first-person perspective of what it can be like to live and work in oil extraction spaces, I highly recommend Kate Beaton's illustrated book, Ducks, Two Years in the Oil Sands.

00:46:26.573 --> 00:46:29.653

<v SPEAKER_2>That book haunted me, really, and I think about it quite often.

00:46:29.653 --> 00:46:30.753

<v SPEAKER_2>I think everyone should read it.

00:46:31.553 --> 00:46:42.333

<v SPEAKER_2>For me personally, as a scholar, the book that had the most significant impact on my thinking about oil was Ross Barrett and Daniel Worden's 2014 edited collection called Oil Culture.

00:46:43.073 --> 00:46:57.733

<v SPEAKER_2>This book shaped my view of oil, not necessarily as a system of things, pipelines, refineries, barrels, but more as this constellation of ideas, imaginaries, cultures, traditions, heritage.

00:46:58.113 --> 00:47:04.733

<v SPEAKER_2>So I think that book had a really big impact on my thinking of oil, and I recommend all three to your listeners.

00:47:04.813 --> 00:47:10.233

<v SPEAKER_1>Yeah, I mean, all three would be quite interesting for people out here in Alberta as well.

00:47:10.653 --> 00:47:14.893

<v SPEAKER_1>Yeah, I have heard about, especially ducks, I've heard quite a bit about that.

00:47:14.973 --> 00:47:19.153

<v SPEAKER_1>But also very interesting, the remark about how people tie up their identities.

00:47:19.153 --> 00:47:24.773

<v SPEAKER_1>Of course, people have identities related to what they do and what the wealth around them comes from.

00:47:25.693 --> 00:47:33.493

<v SPEAKER_1>It's of course a very important thing for people to understand, I suppose, why it is that they have the quality of life that they have.

00:47:33.493 --> 00:47:38.653

<v SPEAKER_1>And so that's something that is very relevant out here, out here in Western Canada.

00:47:38.653 --> 00:47:49.033

<v SPEAKER_1>And, you know, if you, for people, East, especially, I really recommend people come out here to kind of get a sense for that.

00:47:49.353 --> 00:47:51.233

<v SPEAKER_2>Yeah, yeah, no, absolutely, Joe.

00:47:51.373 --> 00:47:56.093

<v SPEAKER_2>And I think there's actually a lot of parallels to draw between Wales and Alberta.

00:47:57.473 --> 00:48:05.673

<v SPEAKER_2>Both considered kind of small populations on the edge of a larger metropole, which had different cultures and histories.

00:48:06.433 --> 00:48:15.213

<v SPEAKER_2>And both kind of felt that they had been passed up in this kind of technological progress and kind of this, you know, we're onto the next thing.

00:48:15.213 --> 00:48:19.753

<v SPEAKER_2>It doesn't matter if your whole culture and society and heritage and way of life is going to be impacted.

00:48:19.753 --> 00:48:40.533

<v SPEAKER_2>So I think there's certainly a lot of lessons, I think, in the resistance movement of South Wales, the anti-oil movement that I think people in Alberta could draw on in kind of constructing a case for supporting the Canadian oil and gas industry and not just kind of abandoning it like Britain abandoned its coal industry.

00:48:40.793 --> 00:48:41.893

<v SPEAKER_1>Yeah, absolutely.

00:48:42.413 --> 00:48:43.513

<v SPEAKER_1>Well, fantastic.

00:48:43.573 --> 00:48:45.613

<v SPEAKER_1>Lots to think about, Ian.

00:48:45.613 --> 00:48:52.173

<v SPEAKER_1>Of course, like you said throughout the podcast, there's various moments where we could have had an entire podcast about that specific thing.

00:48:52.173 --> 00:49:12.433

<v SPEAKER_1>So I'm sure we'll be bringing you back on again very soon to start to unpack some of those areas because all of this is going to be very relevant, especially if you are correct that we're getting more into that great power world rather than, which I kind of feel as though that's where we're headed, rather than people talking about having two different poles.

00:49:13.153 --> 00:49:19.893

<v SPEAKER_1>I just don't feel as though China is interested in taking on that hegemonic role and the United States seems to be increasingly uninterested as well.

00:49:20.133 --> 00:49:24.633

<v SPEAKER_1>So that's more of a great power world, which is a very different world from what we live in right now.

00:49:25.553 --> 00:49:26.233

<v SPEAKER_2>Absolutely.

00:49:26.253 --> 00:49:27.673

<v SPEAKER_2>Yeah, I'd love to come back, Joe.

00:49:27.673 --> 00:49:29.233

<v SPEAKER_2>I really appreciate you bringing me on.

00:49:31.033 --> 00:49:38.013

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00:49:38.593 --> 00:49:41.213

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00:49:41.753 --> 00:49:43.613

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00:49:43.793 --> 00:49:47.553

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00:50:03.973 --> 00:50:07.673

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00:50:08.213 --> 00:50:10.693

<v SPEAKER_1>Thanks go out to Drew Phillips for our music.

00:50:11.313 --> 00:50:14.993

<v SPEAKER_1>I'm Joe Calnan, thanks for listening to Energy Security Cubed.