



# Strategic Insights into the Future of Energy

Global Outlook Norway  
August 14, 2017

Sarah O. Ladislaw

ENERGY & NATIONAL SECURITY PROGRAM

# A New Energy Paradigm

2000 – 2010	2010-Present
Insatiable Chinese energy demand growth	Slowing and changing Chinese demand growth
OECD driven energy economy	Non-OECD driven energy economy
Scarcity and security mindset	Abundance across all energy sources
Bigger is better – predominance of scale	Distributed resources – agility is key
Climate change 1.0 – Top Down	Climate change 2.0 – Bottom Up

# Global Realignment – Above and Below the Surface



Still strongest but  
no longer  
superpower

---

How to build  
coalitions?



Resurgent global  
antagonist – strength in  
opposition

---

How to right the ship?



Slowing rise into co-equal  
global power and rival

---

How to engage without  
conflict?



Declined global  
power status

---

How to build  
norms?



Region in chaos;  
host of proxy wars

---

New source of  
order?

“The Great Global Awakening”

# The Great Global Awakening

## Challenges the Legitimacy of All Nation States and the Future World Order

Backlash to Globalization

Radicalization

Isolationism

Populism

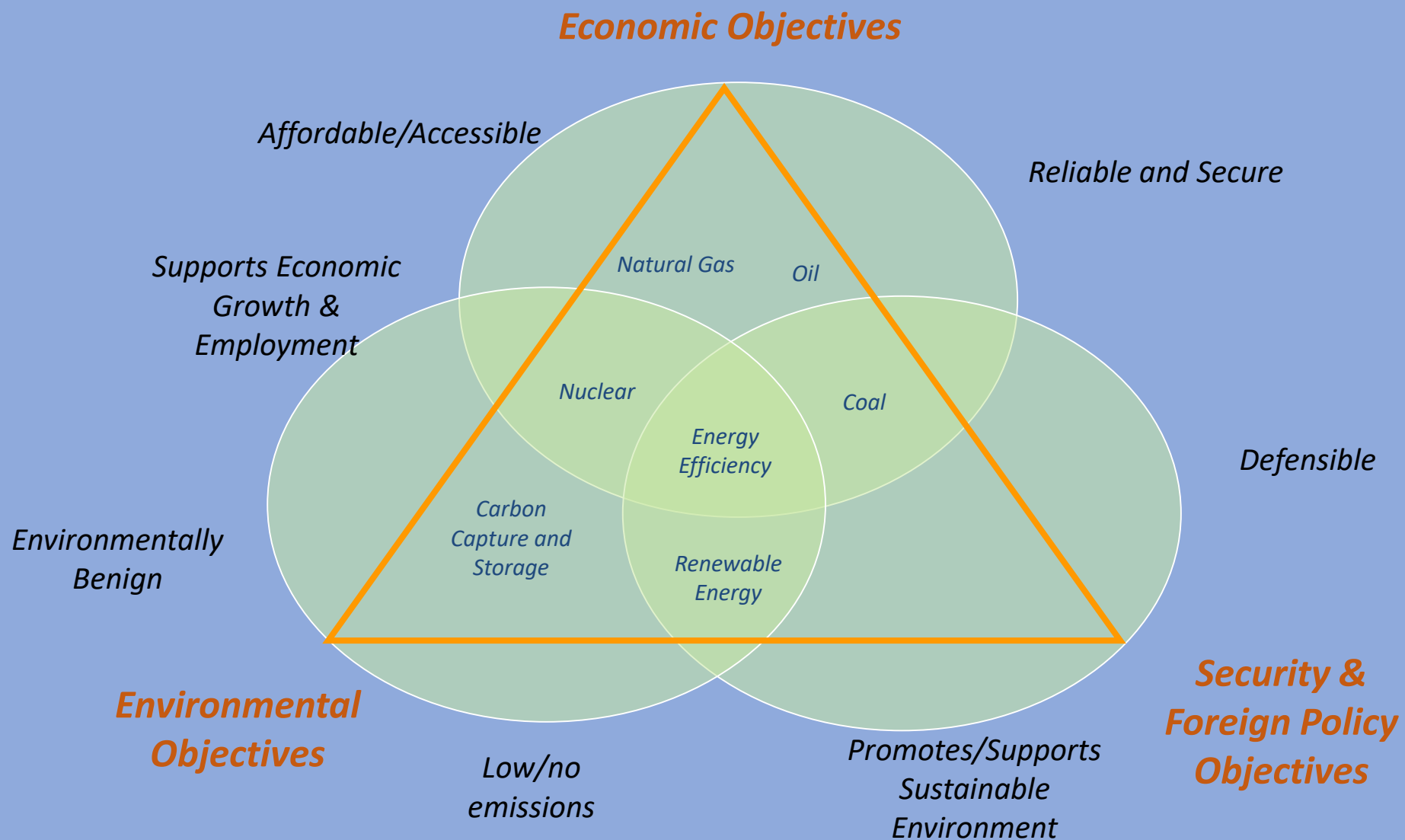
Curbing Capitalism

Realism Redux

Liberal Resilience

Opportunistic Chaos

# ENERGY POLICY MODEL



An aerial photograph of a large offshore oil platform in the ocean. The platform has a green and white structure with a yellow helipad on top. In the background, there are several large, rounded mountains under a hazy sky. The water is a deep blue-grey.

# Thank You

Sarah O. Ladislaw

ENERGY & NATIONAL SECURITY PROGRAM

# Three Key Trends

---



Oil Market Dynamics  
Lower for longer prices? At what cost?



Natural Gas Evolution  
Positioning for a competitive future



Climate Change  
The challenge and the opportunity

## Temperature anomalies

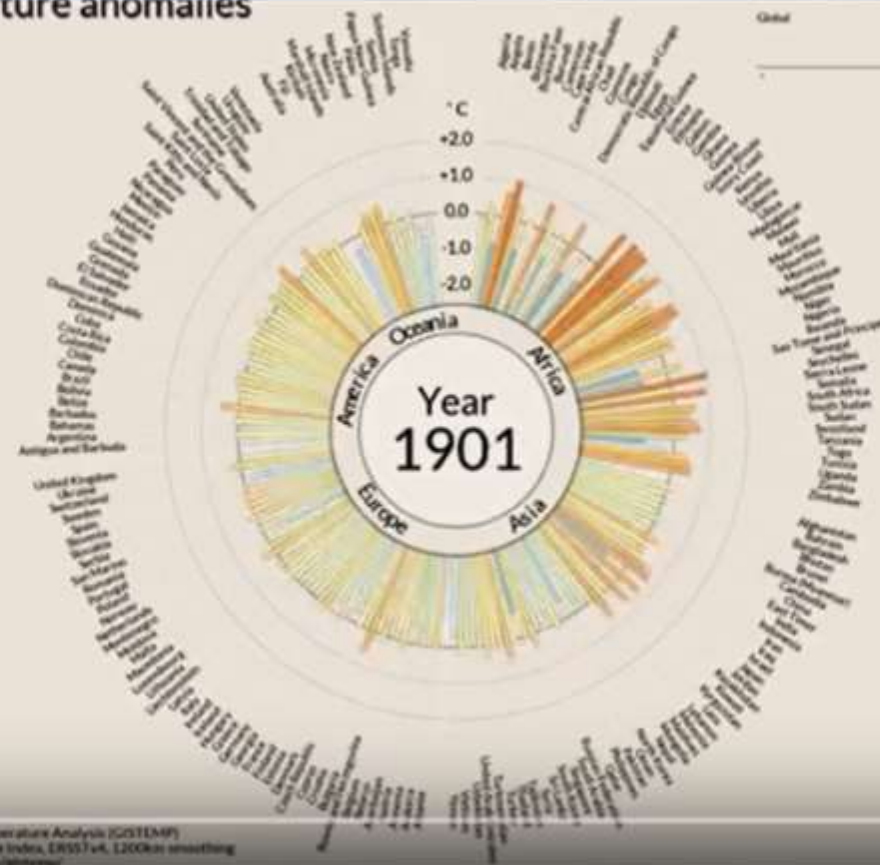


Photo courtesy:  
 NASA/GISS Surface Temperature Analysis (GISTEMP)  
 World Surface Temperature Index, ERSST v4, 1200km smoothing  
 Average of monthly temperature anomalies, GISTEMP base period 1951-1980