

First victims of energy transition

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A few weeks ago, Sinn Fein, the Irish nationalist party, won control of parliament in the north of Ireland for the first time since the dismemberment of Ireland in 1921. This is obviously a source of some discomfort for the unionists in the north, who worry that Sinn Fein will eventually use this opportunity to call for a national referendum on reunification.

What has not been discussed is why Sinn Fein won. Its victory and the potential reunification of the Emerald Island are downstream effects of the much-propagandized “energy transition.”

Let’s go through the chain of events. In Europe last year, wind power generated less electricity than expected. Consequently, the European Union, especially Germany, had to burn more natural gas to generate electricity. Obviously, natural gas used to make electricity in the summer can’t be used to heat homes in the winter.

The drain on natural gas inventory was exacerbated both by the previous and pending closures of coal-fired and nuclear power plants across the continent and by the Europeans’ steadfast resistance (with the exception of Denmark) to developing their own sources of natural gas.

As a direct consequence of all of this, the Europeans have been unable or unwilling to stop importing natural gas from Russia, because it is the only thing keeping the European economy afloat and keeping EU governments in power. It is also, unfortunately, the only thing funding the Russian effort to kill Ukrainians.

Europe is scavenging the planet for supplies of liquefied natural gas. As a practical matter, that means that nations without their own supply of natural gas have had to compete on a price basis with the Europeans for natural gas. This competition has led to price increases for natural gas and diversions of cargoes that would have otherwise gone elsewhere (mostly Asia).

Not surprisingly, this competition has also caused the price of natural gas everywhere to jump. In Europe, the price of natural gas is about \$32/ MMBtu. In the United States, natural gas prices, which were less than \$3/MMBtu last year, are now above \$8/MMBtu.

Those spiraling prices also mean that everything made with natural gas is going to be more expensive. Take fertilizer, for example. The Fertilizers Price Index has increased more than 150% in the last 12 months. Guess who is getting priced out of the fertilizer markets? That’s right, farmers in Asia and Africa. Food prices are already at historic highs, and it seems almost certain that, as a result of expensive natural gas — and, consequently, fertilizer — there will be lower farm yields and even more expensive foods in the very near future.

That means just one thing: increased mortality associated with hunger and malnutrition.

In short, a direct line can be drawn from excessive European reliance on unreliable energy to the unnecessary deaths of people who would have otherwise survived.

A direct line also can be drawn from excessive European reliance on unreliable energy to conditions in which the Russians concluded that February was the right time to invade Ukraine.

Surely, Mr. Putin was aware that the inventory of natural gas in Europe was low because of the underperformance of wind generation. He also was very much aware that the Europeans had to keep importing Russian natural gas, no matter what happened in Ukraine.

In short, because of their unwise energy decisions, the Europeans placed themselves in a situation where they could not (and cannot) firmly and energetically resist the threat to the status quo from the Russians.

It is a cautionary tale for the United States as well. When you depend on energy sources that you don't control (like wind and solar) or from hostile regimes (think communist China), you are setting the table for someone else to take advantage of you.

All of which brings us back to Sinn Fein and Irish reunification. Sinn Fein won the elections in the north because of voter concerns with energy prices and inflation. Many households in the north could afford to heat their homes only one or two days a week during the winter. Sinn Fein ran and won on kitchen table issues, not by appealing to sentiments about reunification.

Nevertheless, the incompetence and pervasive inability of the European and British governments to pursue rational energy policies have now opened the door to reunification.

Invasion. War crimes. Famine. High prices. Dissolution of the British Empire. The “energy transition” — touted by President Biden recently as “incredible” — doesn't seem to be getting off to a good start.

That's probably because the notion of a government- mandated energy transition is propaganda, and dangerous propaganda at that.

Every previous energy transition has been driven by some significant change in technology, has improved the lot of humans, and resulted in more abundant and more efficient energy delivered at lower cost. This one is being driven by ideological preferences and government mandates and is leading toward more human misery and energy that is less abundant, less efficient and more expensive.

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