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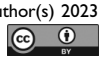

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Leaving oil in the ground: Ecuador's Yasuní-ITT initiative and spatial strategies for supply-side climate solutions

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Abstract

Rather than a surprising and illogical move to leave oil in the ground for international compensation, Ecuador's Yasuní-ITT Initiative should be understood as an outcome of ongoing struggles of interests within the state at the time. In this landmark oil moratorium attempt, launched in 2007, the Ecuadorian government offered to forego extraction of its largest oil reservoir, projected to contain 20% of the country's oil reserves, if it received international compensation totalling half the expected revenues. If successful, the initiative could have constituted a post-extractivist economic model that would have favoured indigenous and environmental interests at the expense of oil interests. However, the initiative was cancelled in 2013, after only a fraction of the requested sum had been received, and oil production is now ongoing. Most academic literature highlights how a developmentalist petro-state was willing to abstain from extracting its largest oil reserves, yet encountered a range of national and international obstacles. This article defies this 'against all odds' framing. It examines the initiative as a space-making process and understands the attempted internationalisation of the Yasuní oil as the state's spatial strategy to ensure continued income from oil, either in the form of compensation or by legitimising their continued existence as a petro-state and for business as usual if the attempt failed. This analysis demonstrates how understanding political economic resource governance and its space-making processes as outcomes of struggles and complex negotiation processes within the state could bring new insights into energy transition processes.

Keywords

Ecuador, oil, strategic-relational state space, supply-side, Yasuní

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Introduction

Ecuador's Yasuní-ITT Initiative to keep the oil in the ground in the Ishpingo, Tambococha and Tiputini (ITT) areas of the Yasuní National Park in the Ecuadorian Amazon has been heralded as innovative and unprecedented in several ways. Ecuador, a Global South 'petro-state' relying on oil for a third of its export earnings and public revenues, developed the first major international attempt to leave oil in the ground in exchange for international compensation. The Ecuadorian government offered to forego extraction of its largest oil reservoir, projected to contain 20% of the country's oil reserves, if it received international compensation totalling half the expected oil revenues. Launched in 2007, the initiative was cancelled in 2013, after only a fraction of the requested sum had been received. Previous studies have framed the initiative as occurring against all odds and understand its ultimate failure as the outcome of a range of national and international obstacles, external to the initiative itself (Kingsbury et al., 2019; Martin, 2011b; Pellegrini et al., 2014; Sovacool and Scarpaci, 2016).

This article follows up Environment and Planning A's 2020 Theme Issue on New Energy Spaces: Towards a geographical political economy of energy transition, through analysing the Yasuní-ITT Initiative and the way it was shaped into state policy as a space-making process. It finds that the attempt to leave the oil in the ground for international compensation should be understood as a petro-state's spatial strategy to ensure continued revenues from oil, in a context of changing conflicts of interests within the state. As such, this article presents a re-interpretation of the case, not as a surprise development occurring against all odds and which failed as a result of extrinsic factors, but rather as a resource policy shaped by the co-existence of environmentalist and oil interests within the state apparatus. The analysis is premised on Bob Jessop's conceptualisation of the state as a changing field of social relations and an unequal 'terrains of struggles' for competing interests. It considers the Ecuadorian state's spatial strategy as attempts to reconcile the ongoing, multiple conflicts of interests within the state (Kristoffersen and Young, 2010). It subsequently understands the internationalisation of the Yasuní oil as a result of the *least* risky spatial strategy of the petro-state for adopting non-extraction as state policy: towards an international strategy where the financial costs are *shared* rather than towards more local-scale decision-making, which could potentially result in non-extraction without compensation. Employing a political economy perspective, the objective of this article is thus to couple changing geographies of oil dependency with strategic-relational state space theory.

A relatively new but burgeoning literature on supply-side climate change mitigation efforts classify and analyse different types of supply-side measures and their levels of effectiveness and equity (Carter and McKenzie, 2020; Gaulin and Le Billon, 2020; Le Billon and Kristoffersen, 2020; Muttitt and Kartha, 2020). Carter and McKenzie find that efforts have been led 'primarily by rich developed states with the capacity to transition, but *without* significant reserves or high dependence on fossil fuel extraction (2020: 2, original emphasis). The Yasuní-ITT Initiative is an outlier according to this overview, and Ecuador is considered a 'first-mover' internationally to carve out a policy that would leave the oil in the ground due to climate concerns. Understanding firstly the factors at the state level for why a state developed an international initiative, and secondly the reason for its failure, are important contributions to nascent work on international supply-side climate change mitigation efforts. This is a field in which there have been calls for further analysis of the 'conduciveness of supply-side policies in international policy cooperation' (Green and Denniss, 2018: 73), of national policy trajectories and what makes an initiative successful or not (Carter and McKenzie, 2020), and for going deeper into specific cases, to better understand 'the intricacies of power relations' that have prevented effective supply cuts (Le Billon and Kristoffersen, 2020: 1087).

The analysis of the Yasuní-ITT Initiative presented in this article is based on data obtained from semi-structured interviews with key actors in Ecuador and desk-based research. Nine semi-

structured interviews were carried out in Quito, Ecuador, in November and December of 2018 for a larger research project (cf. Laastad, 2021, 2022). The interview sample consisted of former government officials who had worked directly with the Yasuní-ITT Initiative (4), representatives from NGOs heavily involved in contesting extraction (2), current government officials (2) and one academic, and these were asked to describe the recent history of the Yasuní-ITT as government policy. The interview data were analysed through utilising perspectives from critical state theory, and additional data was obtained from existing academic literature. Academic literature has had a dual role in the analytical process, both as a source of concrete empirical information for the analysis, and as the subject of a critical reading of assumptions and arguments regarding the reasons for the initiative's failure.

An important weakness of the interview sample is its underrepresentation of indigenous voices. The indigenous movement, which is an important political actor in Ecuador, supported the initiative, and its understanding of state strategies and motives for potentially leaving the oil in the ground in the ITT oilfield would have been relevant for this analysis. Interviews with representatives from local indigenous communities in the Yasuní National Park were not pursued due to the scaling of the initiative. As will be detailed below, it was squarely framed as national policy, and there was a lack of local-scale participation. For the same reason and due to the inaccessibility of the ITT oilfield interviews were carried out in the capital city of Quito only. In the reading of the Ecuadorian state and the Yasuní-ITT Initiative presented below, theory-informed inference from the abovementioned information has resulted in new interpretations of the case study and subsequent theory development.

After describing the Yasuní-ITT Initiative, the progress of the proposal and its ultimate cancellation, the article goes on to point out some key tendencies in the post-mortem academic articles dissecting the reasons for its failure. Most articles engage the abovementioned 'against all odds' narrative, and point to various tensions within the government and between the Ecuadorian government and the international scale as reasons for its lack of success. This article argues that conditioned non-extraction as a policy solution should instead be understood as a spatial strategy resulting from shifting relations of power between environmental interests and entrenched oil interests in a new national political administration. By way of a novel strategy of conditioned non-extraction, continued revenues could be ensured, either in the form of compensation or by legitimising business as usual if the attempt failed.

Theoretically, this article thus argues that supply-side climate policy measures do not necessarily constitute a rupture from oil dependency, as they can indeed represent a continuation of it, demonstrating how 'novelty as an emergent property arising from recombination of old and new' (Bridge and Gailing, 2020: 1041) is an important component to changing geographies of oil. Bridge and Gailing argue that energy transitions are space-making processes, and this is also found in the case of the Yasuní-ITT Initiative, which held the potential of a creative-destructive effect on the energy landscape as well as on social relations across space (Bridge and Gailing, 2020). Further insights on national policy trajectories for supply-side measures can therefore be gained from using perspectives from strategic-relational state theory and geographical political economy.

The Yasuní-ITT Initiative

The Yasuní National Park is located in the upper Napo Basin of the Western Amazon, by the Ecuadorian border with Peru. It has been one of the most intact areas of the Amazon basin and is one of the most biodiverse areas on the planet. It is home to the highest number of amphibians and reptiles on Earth and over 600 avian species (Martin, 2011a). One hectare of forest in Yasuní contains more tree species than are native to the whole of North America (Bass et al., 2010). It is furthermore part of the traditional territories of the Kichwa and Waorani indigenous groups, and of

at least two indigenous groups living in voluntary isolation, the Tagaeri and Taromenane (Larrea and Warnars, 2009). The area was established as a national park in 1979. The current Ecuadorian constitution, adopted in 2008, establishes that extractive activities are prohibited in national parks in Ecuador, except when it is within national strategic interests. This has been evoked several times, however, also in the case of extraction in the ITT field.

Within the national park, oil in the ITT areas of the Yasuní were discovered in the 1990s and early 2000s. These oil reservoirs are estimated to contain 846 million barrels of oil, accounting for approximately 20% of Ecuador's national reserves (Martínez, 2009). Activists began calling for an oil moratorium in vulnerable Amazon areas in the mid-1990s. The idea of an oil moratorium arose on the coattails of previous efforts to draw attention to the detrimental effects of oil extraction in the Ecuadorian Amazon. Since the late 1980s, the indigenous and environmental movements have worked together through campaigns such as *Amazonía por la vida* (Amazon for life) to increase attention to the damaging socio-environmental effects of oil extraction in the Amazon. Other important precedents include an international lawsuit against Texaco, later Chevron – where 30,000 indigenous and local small-scale farmer plaintiffs carried out international litigation efforts against the oil company's dumping of oil and toxic waste, and its social and health consequences – and the Sarayaku indigenous community's resistance to oil activity in their territories, a case they argued before the Inter-American court and won. Due to these antecedents, actors from the environmental movement argue that there is a relatively high degree of consciousness of the environmental and social costs of oil extraction in Ecuador (Alberto Acosta, interview with author, December 2018; Lewis, 2016).

In 2006, Rafael Correa won the presidential election with promises to break with the neoliberal past. He ran as the leader of the new political alliance, *Alianza PAÍS* ('country alliance', but also the acronym of 'proud and sovereign fatherland' in Spanish), initially a broad platform including indigenous, environmentalist, statist and developmentalist voices (Novo, 2014). Its post-neoliberal political project, named the Citizens' Revolution, aimed to rebuild the public sector and expand welfare through social programmes and government spending on health, education and infrastructure (Conaghan, 2011).

The organisations *Acción Ecólogica* and Oilwatch had developed the idea of leaving the oil in the ground in vulnerable areas of the Amazon into non-extraction of the oil in the ITT field specifically in 2005 (Oilwatch, 2005). Alberto Acosta, a prominent public academic and environmental activist who had been involved in the development of the moratorium idea, was Correa's first Minister of Energy and Mines, between January and June of 2007. He had a personal relationship with President Correa, and introduced the idea to him while he was Minister. This was developed into the Yasuní-ITT Initiative, and an oil moratorium conditioned upon international compensation was adopted into state policy in the summer of 2007.

An agency was set up to define the initiative, to investigate its international feasibility and to promote it internationally. To legitimate and institutionalise the initiative internationally, a trust fund managed by the United Nations Development Programme (UNDP) was established. Initially, the payments were for keeping the oil in the ground in a vulnerable area to protect indigenous livelihoods and biodiversity, but this was later reconceptualised as concerning the avoidance of carbon emissions, to better align the initiative with international carbon trading agreements (Pellegrini et al., 2014). The revenues would be directed towards biodiversity conservation, renewable energy sources, social development in the surrounding areas and in innovation and science in the fields of bio-knowledge, energy and water management (Larrea and Warnars, 2009; Pellegrini et al., 2014).

Despite a high degree of civil society and celebrity support internationally, uncertainty regarding the long-term survival of the initiative and commitment from the Ecuadorian government prevailed amongst potential donors. By May 2013, approximately USD 37 million of the expected USD 3.6

billion had been committed, and only US$13 million had actually been deposited in the fund (Pellegrini et al., 2014; Sovacool and Scarpaci, 2016). President Correa cancelled the initiative on 15 August 2013, stating that 'the world has failed us' (Presidencia de la República del Ecuador, no date). The deposited money was refunded, and oil extraction began in Tiputini in 2016, in Tambococha in 2018 and in Ishpingo in 2022.

Literature review

Several analyses of the initiative and why it was ultimately unsuccessful take as their starting point the sheer unlikeliness of the initiative. Describing its development, Espinosa calls it 'astonishing', 'puzzling' and 'a riddle' given Ecuador's oil dependency (2013: 27). Fierro concurs, opining that 'the unthinkable happened', when 'a country highly dependent on oil revenue was willing to refrain from exploiting its largest oil reserves in exchange for partial compensation' (2017: 265). Kingsbury et al. offer similar statements, arguing that 'the initiative defied expectations', and that 'if anything, that the Yasuní-ITT Initiative emerged in a place like Ecuador at all offers at least some hope for future responses to the challenges of climate change and development' (2019: 531). They further bolster the unlikeliness of it being precisely in Ecuador that the initiative occurred, by concluding that 'if a petro-state like Ecuador could contemplate leaving the oil in the ground, why can't others do the same?' (p. 536). The reoccurring idea that the Yasuní-ITT Initiative occurred despite all odds in effect mirrors Ecuadorian President Correa's own framing. When he announced the initiative at the UN General Assembly in 2007, he stated that 'for the first time, an oil producer country, Ecuador, where a third of the resources of the State depends on the exploitation of the abovementioned resources, forgoes this income for the well-being of the whole of humanity and invites the world to join these efforts through a fair compensation' (Correa, 2007).

The cited literature's explanations for why this initiative nonetheless became state policy revolve around an opportune political moment and important key figures. When Correa first was elected president in 2006, Ecuador was marked by political unrest. Correa's political project represented change (Espinosa, 2013). Correa's first act as president was to call for a referendum on a new constitution, which gained overwhelming popular support. A constituent assembly was tasked with writing the new constitution, which was adopted in 2008. Through processes such as the constituent assembly and a new constitution the initial phase of the Correa government was particularly receptive to ideas stemming from civil society (Martin, 2011a; Pellegrini et al., 2014). In addition to a receptive political environment, key figures from environmental civil society became part of cabinet and government, not least of them Alberto Acosta. He served as President of the constituent assembly and Minister of Energy and Mines, and as mentioned introduced the idea of an oil moratorium to the President (Espinosa, 2013; Kingsbury et al., 2019; Martin, 2011a).

The underlying idea seems to be that the government nonetheless worked against 'entrenched' institutions and 'enduring' structures of the petro-state, this arguably being a main reason for the initiative's failure, according to Kingsbury et al. (2019). This includes public opposition from both the Ministry of Energy and Mines and the public oil company Petroecuador, but also generally 'clientelism, opacity, political verticalism and rent-seeking' (p. 536). Kingsbury et al.'s analysis of the petro-state also includes more intangible notions of 'political culture' and 'policy pathways', where oil extraction is always part of the policy conversation and always understood as the solution. In their article, Kingsbury and colleagues go on to argue that the cancellation of the Yasuní-ITT Initiative boils down to the 'inability – or unwillingness – to depart from patterns, relationships, and dynamics of the developmentalist petro-state', and again, that what is most notable is 'that it emerged at all' (p. 542).

While the entrenched structures of the petro-state and of oil's sheer economic importance form a common explanation for its failure, the second common denominator in the literature on

Yasuní-ITT is the surfacing of multiple tensions – between state actors, between state and civil society and between geographical scales – understood to directly undermine the initiative's success (Finer et al., 2010; Martin, 2011a; Pellegrini et al., 2014; Sovacool and Scarpaci, 2016). The public opposition to the initiative by the powerful public oil company Petroecuador, the existence of a Plan B to drill and the ongoing production in the five other oilfields in the Yasuní National Park led to international scepticism about the permanency of the initiative (Certomà and Greyl, 2012; Martin, 2011a). The international legitimacy of the initiative was further questioned, as it did not fit into current international governance frameworks for climate change mitigation (Pellegrini et al., 2014). The Ecuadorian government attempted to increase the initiative's legitimacy internationally through unsuccessfully linking it to carbon emission trading. National civil society was dissatisfied with this economisation of the benefits of leaving the oil in the ground. International carbon markets were at the time immature and ineffective, and also understood by the environmental groups that had first proposed the initiative as mechanisms for polluters to pay to keep polluting (Martin, 2011a). The original proposal to leave the oil untouched was to protect less quantifiable sources of value, such as the survival of indigenous groups and the preservation of biodiversity (Martin, 2011a; Martínez, 2009). This conflict between a market-based reasoning for non-extraction and a normative and rights-based reasoning attest to a decreased influence of civil society once the initiative had been adopted into official state policy. These tensions are portrayed as obstacles to the initiative, somehow external to the initiative itself. By employing strategic-relational state theory as laid out below, the same tensions can be understood as inherent features of the social relations that constituted the state at the time, and which also made the initiative possible in itself.

Theoretical framework

The Yasuní-ITT Initiative is here examined as a geographical process, which entails examining the underlying processes that give rise to patterns and scales of activity (Bridge et al., 2013). This analysis is inspired by recent scholarship on energy transitions, which emphasises the space-making properties of energy transition processes: how energy transitions are processes that are constituted by space but are also constitutive of space (Bridge and Gailing, 2020; Bridge et al., 2013; Gailing et al., 2020; Kirshner et al., 2020; Le Billon and Kristoffersen, 2020). Le Billon and Kristoffersen argue that, in particular, supply-side carbon reduction measures can constitute a 'negotiated' reshaping of energy spaces, and a more purposeful political intervention compared to market-driven demand reduction. This has spatial implications, as new spaces of political interactions are constituted through energy transition processes (2020). Such spaces range from the local to the geopolitical, and can include local spaces of supply constraints through, for example, blockades (Gaulin and Le Billon, 2020; Le Billon and Kristoffersen, 2020), national public spaces for contesting contentious extractive projects (as in the case of Yasuní-ITT after its cancellation), negotiations between oil industry trade unions and environmental movements (Jordhus-Lier et al., 2021), international divestment campaigns and transnational justice and solidarity networks (Carter and McKenzie, 2020; Le Billon and Kristoffersen, 2020) and international policy coalitions to avoid carbon leakage through other suppliers increasing their production in tandem with decreases elsewhere (Blondeel et al., 2021; Gaulin and Le Billon, 2020).

Bridge and Gailing call for employing a geographical-political-economy perspective with regard to energy transitions. Geographical political economy examines the spatialities of capitalism, and how geography co-evolves with processes of commodity production, market exchange and accumulation (Sheppard, 2011). This perspective facilitates a relational and processual approach to space, and one of its main contributions is the analysis of 'how sites, scales and spatialities of energy systems are key contemporary sites of struggle, through which broader questions of political

economic governance (and the social relations of capitalism) are being worked out' (Bridge and Gailing, 2020: 1040). This perspective provides a useful lens through which the conditioned oil moratorium attempt in the Yasuní can be analysed, and how it was constituted spatially through re-scaling.

The concrete way in which a geographical-political-economy perspective is employed on the Yasuní-ITT Initiative is through engaging with concepts from critical state theory. Below, the state-capital relations of a neo-extractivist petro-state is discussed. The state is understood as a terrain of struggle for different social forces, where forces supporting the state's accumulation will have an advantage. However, particular political conjunctures such as the Citizens' Revolution can alter the relative weight of social forces, and result in state strategies that are a condensation of changing social power relations and a recombination of old and new.

Ecuador's development model has been characterised as progressive neo-extractivism, which has been defined by Gudynas as a 'twenty-first century model in which the state negotiates a larger share of the profits' (referenced in Farthing and Fabricant, 2018: 6). The state becomes a main resource actor, through renationalisation, joint ventures and re-negotiation of taxes and royalties (Gudynas, 2011). The term has been applied to Latin American countries that underwent a turn to the left in the 2000s, where short-term returns were needed to finance governments' agenda to increase public provision of welfare and instigate large-scale public works on infrastructure (Bull, 2013). An increase in public spending to finance social programmes, poverty alleviation strategies and infrastructure developments was sustained by an increase in state revenues from extractive sectors, both in absolute terms due to high resource prices, and as a share of revenues (Arsel et al., 2016; Bebbington, 2012; Svampa, 2019). In Ecuador, the hydrocarbon sector was nationalised in 2008, and existing contracts with transnational companies were replaced with service-provisions contracts with the public oil company Petroecuador and its subsidiary Petroamazonas.

When the state is able to capture a larger share of rents from natural resources as a main source of state income, it becomes less dependent on business interests and the capital classes to ensure accumulation (Chiasson-LeBel, 2016; Fairfield, 2015). As accumulation and economic growth are ensured from resource rents and potentially re-investments of those in productive sectors, the state can ensure accumulation without serving the interests of capital, and therefore increase its relative autonomy from class interests (Chiasson-LeBel, 2016).

This political economy context forms the basis for the extractive imperative theorem. Due to the economic importance of the extractive industries in the countries of the Latin American left, extraction became an imperative that needed 'to continue and expand regardless of prevailing circumstances' (Arsel et al., 2016: 880). When more extraction emerges as a response to all internal and external challenges, extractivism assumes 'teleological primacy' and becomes the goal in and of itself. As such it takes over the logics of other state activities, reorienting policy objectives to further justify and advance extractivism (Arsel et al., 2016).

Extractivism can thus be understood as a state accumulation strategy, which has been defined by Jessop (1990) as 'a specific economic "growth model"' and the 'extra-economic preconditions and general strategy for its realisation' (p. 198), including state institutions and policies capable of reproducing it (Brenner, 2004). To ensure the continuation of its accumulation strategy and ensuring state revenues from resource rents, the state needs to uphold an (hegemonic) understanding of its necessity for economic development (Jessop, 1990). For neo-extractivist pink tide governments extraction was seen as the solution to any policy-challenge, a main engine for economic development and a requisite to combat poverty, and the hegemony of extractivism was attempted upheld through equating oil production to development, progress and welfare to the benefit of citizens (Valdivia and Lyall, 2018). Such a strong discursive link between oil and development provides a further consolidation of oil's centrality in the state accumulation strategy.

As a main priority of the neo-extractivist state is to sustain accumulation through extractivism, it follows that extractive interests will be favoured in state action and state strategy. The attempted non-extraction in the Yasuní demonstrate that the state can nonetheless be open to other interests. This can be explained by the state's institutional form, which according to Jessop's strategic-relational approach, can be understood as a 'site', 'arena' or 'terrain of struggles' for different forces (e.g. Jessop, 2007, 2016). The understanding of the state as a terrain of struggle is based upon a relational understanding of the state, developed from Nicos Poulantzas' conceptualisation of the state as a social relation, and as the 'material condensation of societal power relations' (Poulantzas, 2014: 127). This approach is relational, as it emphasises how diverse forces' struggles both within and outside of the state apparatus can shape state strategy, and underlines how the state cannot be studied in separation from society (Jessop, 2007). It is also relational as it does not understand the state as an entity, but rather an 'institutional ensemble' (e.g. Jessop, 2007) constituted by institutions and agencies with different interests, resources and aims, and peopled by politicians and bureaucrats with their own backgrounds and beliefs. The institutional ensemble of the state is a condensation of contradictions and consistencies. The state can therefore be understood as a 'contested and changing field of discourses, policies and social relations' (Kristoffersen and Young, 2010: 578). This allows for analyses to give weight to the 'heterogeneity, complexity and contradictoriness of state institutions' (Painter, 2006: 764).

The state is however not an equal terrain of struggle. If an accumulation strategy is hegemonic, then the many entities that make up the state will have a common aim to ensure its continuity. An accumulation strategy thus also acts as a state unifying project; it makes the state act conjointly as a whole (Jessop, 1990). In this way, those interests securing accumulation will be favoured through the state's *strategic selectivity*, 'a tendency to privilege particular social forces, interest and actors over others' in their struggle to 'influence the state's evolving role in regulating the circuit of capital and in the establishment of hegemony' (Brenner, 2004: 87–88).

State strategies are defined as 'initiatives to mobilise state institutions in order to promote particular forms of socio-economic interventions' (Brenner, 2004: 88). State strategies are the outcome of a condensation of struggles of interests, reflected in government at that certain point in time. Although the strategic selectivity of the state might entail that not all forces, interests and actors will have the same potential to shape state strategy, it does not mean that these are completely unable to do so. Indeed, the strategic selectivity of the state is in itself an object of socio-political struggle and mobilisation (Jessop, 1990). Jessop emphasised how in specific political moments that he calls 'conjunctures' or 'conjunctural events', opportunities can arise for socio-political actors to challenge and alter the strategic selectivity of the state. Such conjunctures are 'complex interaction between the circuit of capital, accumulation strategies, state forms and the balance of political forces' (Jessop, 1990: 166), which can change the relative weight of social forces engaging in struggle (Jessop, 2007).

The spatial dimensions of the strategic-relational state are grasped through the notion of state space. State space is defined by Kristoffersen and Young as 'the spatial strategies through which the state seeks to reconcile conflicts over economic growth, social justice and environmental protection' (2010: 578), and by Brenner as 'the changing geographies of state intervention into socio-economic processes' (Brenner, 2004: 78). This means that the spatiality of the state is seldom, if ever, permanently fixed, but instead 'represents an emergent, strategically selective, and politically contested process' (Brenner, 2004: 89). It is 'actively produced and transformed through socio-political struggles at various geographical scales' (Brenner, 2004: 80).

In sum, a strategic-relational approach to studying the state entails understanding the state as a key site for contestation, and politico-economic resource governance and its space-making processes as outcomes of struggles and complex negotiation processes within the state. These struggles take place in an unequal terrain shaped by particular state-capital relations. Understanding the state

as an unequal terrain of struggle entails understanding the tensions and obstacles pointed out by other authors above, not as external factors *affecting* state policy, as there is no sharp divide between state and society, but rather as examples of the type of conflicts of interests that continually *constitute* statehood, at that particular point in time. This argument goes against the notion of the petro-state as a static entity, or as an unwieldy machinery resistant to change, and instead portrays it as a malleable and changing social relation, based on conflict of interests and political struggles.

As supply-side measures constitute a 'negotiated' reshaping of space, they can potentially constitute climate policy interventions across scales, with the state playing a key role in such potential interventions. Whether successful or not, they are therefore an expression of changing geographies of state intervention into socio-economic processes to reconcile conflicts between interests that attempt to work through the state (Brenner, 2004; Kristoffersen and Young, 2010). Strategic-relational state theory is therefore particularly useful for analysing the political opportunities and obstacles facing 'keep it in the ground' measures, but also for examining energy transitions as geographical processes more generally, as it provides an analytical lens through which underlying drivers for spatial patterns and scales of activity can be identified. In the next section, I operationalise this theoretical framework to identify the 'changing fields of social relations' constituting the Ecuadorian state and why and how it gave rise to the Yasuní-ITT Initiative but also led to its cancellation, and in the subsequent section I analyse the spatial strategies through which the state sought to reconcile conflicting interests.

Changing field of social relations

The Correa government and the Citizens' Revolution can be understood as a conjunctural event in which a changing balance of forces altered the strategic selectivity of the state to an extent. This is key to understanding how non-extraction of oil, an idea that challenged the hegemonic project of the state, could become state policy. The decade and a half before Correa's first presidential victory in 2006 was marked by popular mobilisation against the social and economic consequences of neoliberal economic restructuring, with the indigenous movement taking an organising lead. Oil became a point of contention, as due to a privatisation and liberalisation of the Ecuadorian oil sector less revenues befell to the public sector and the national budget (Riofrancos, 2017). The detrimental socio-environmental effects of oil extraction in the Amazon were also given increased national attention (Martin, 2011a). Two positions on oil emerged in anti-neoliberal mobilising: resource nationalism and calls to nationalise the industry, and oil as a threat to indigenous communities' livelihoods and ways of life (Riofrancos, 2017).

Political newcomer Rafael Correa was able to capitalise on people's frustration with the social consequences of neoliberal austerity measures and the extreme distrust of the traditional political elite. Correa's political alliance *Alianza PAÍS* ('country alliance', but also the acronym of 'proud and sovereign fatherland' in Spanish) was a coalition consisting of people from civil society, academia and NGOs (Becker, 2011; Novo, 2014). Jessop (2016) posits that the state's powers 'are activated by changing sets of politicians and state officials located in specific parts of the state, in specific conjunctures' (p. 56). There was for a while blurred boundaries between state managers and social forces, as persons with long trajectories in environmental organisations gained important positions as both political officials and bureaucrats (Lewis, 2016). It is this conjuncture that allowed for a civil society initiative with transformative potential to be introduced to the President and adopted as state policy. Carlos Larrea, the technical coordinator of the initiative, summed the first few years of the Correa government as a 'unique window of opportunity' for environmental civil society to exert influence on the state apparatus (interview with author, December 2018).

This changing set of politicians and state officials was matched with a new and temporary institutional channel through which the changing balance of forces could play out: a constituent

assembly tasked with writing a new constitution in 2007–2008. The constituent assembly was characterised by an openness towards new ideas, and was a highly participatory process, with a high degree of civil society input (Gudynas, 2009). In this process environmental interests were able to influence state strategy, discernable through outcomes such as the inclusion of the rights of nature, making Ecuador the first country in the world to provide nature with intrinsic rights (Laastad, 2020). A move towards a more biocentric understanding of the human–nature relationship was also central to the new official development model of Ecuador, named *Buen Vivir*, or good living, after the indigenous concept of living well in harmony with nature (Lalander, 2016; Radcliffe, 2012; Villalba, 2013). *Buen Vivir* was positioned as a post-neoliberal development strategy which in practice would entail utilising oil revenues to diversify the economy, through investments in alternative revenue sources such as bio-prospecting and tourism, with the aim of eventually moving away from oil dependency (Wilson and Bayón, 2017).

Buen Vivir's adoption as Ecuador's development model meant that changing discourses and representations regarding economic growth and accumulation strategies were part of the state project. These developments constituted a partial destabilising of the hegemonic project of the extractivist accumulation strategy, for a period of time, despite continued reliance on oil rents (Laastad, 2022). Oil extraction in highly socially and biologically diverse areas as an inevitable accumulation strategy was open for discussion, and the country's biodiversity was given a leading role in new political strategies. When Correa officially endorsed the Yasuní Initiative in the summer of 2007, it was framed as a concrete policy measure within the *Buen Vivir* framework (Goeury, 2021; Larrea and Warnars, 2009; Le Quang, 2016; Lewis, 2016). As such, it constituted a first step in moving away from *Buen Vivir* as a mere discourse, providing a concrete policy design for post-extractivist development strategy and how to finance it.

With the inclusion of key actors from the environmental movement in government, and environmental civil society's ability to influence the constitution in a biocentric direction, it can be argued that Ecuador experienced an 'environmentalisation of the state' (Kristoffersen and Young, 2010). Despite this vibrant and temporal environmentalisation of the state, the Correa government was characterised by the same set of contradictions as other states that were also part of Latin America's pink tide: while proclaiming change, sovereignty and social justice, the political economy of progressive neo-extractivism as a development strategy and the extractive imperative meant that oil rents continued to be a necessity for state-led development and more extraction emerged as the logical state strategy to respond to internal and external challenges. However, the state's extractivist accumulation strategy was now articulated within the framework of *Buen Vivir*, where continued extraction was a necessity to move away from a reliance on oil in the long-term, as investments of oil rents would be needed in order to build up new productive sectors.

Through struggles of interests, state strategy is produced. The Ecuadorian state under Correa was ambivalent, containing two positions on oil production: a complete opposition to it, and a 'state-corporate alliance to aggressively promote it' (Riofrancos, 2017). State strategies at this conjuncture were a condensation of both resource nationalism and extractives-led Keynesian developmentalism, and non-extraction and a fundamental new development model. The Yasuní-ITT Initiative was a condensation of these two poles: non-extraction became state policy, but it was conditioned upon international financing and there were many unclarities regarding its execution before its ultimate cancellation.

Struggles of interests between non-extraction and extraction were visible within the state throughout the initiative's lifetime. The President of Petroecuador, the public oil company whose 'historical place' within government hierarchy is significant (Martin, 2011a: 68), publicly disputed the initiative, and argued for the necessity of revenues from oil extraction in the ITT field. Oil prices soared in 2007, and a Plan B to start oil production was developed, with Petroecuador discussing possible deals to develop the ITT fields with Venezuelan, Brazilian,

Chinese and Chilean oil companies (Martin, 2011b). The leadership of Petroecuador hoped that their negotiating would convince Correa to decide to extract the fields (Martin, 2011a). In January 2009, the Minister of Mining and Petroleum (renamed from the Ministry of Energy and Mines in 2007), Derlis Palacios, actually announced future biddings for the ITT blocks, stating that keeping the oil in the ground would be considered if an immediate solution was found, but that the country needed money. The Minister of Foreign Affairs, Fander Falconí, rebutted this announcement and apologised for the miscommunication, while President Correa reiterated his endorsement of the initiative and made it official foreign policy without a deadline (Martin, 2011b).

Carlos Larrea, technical coordinator of the initiative, argued that the government was always doubtful of the initiative however, and did not give the Administrative and Leadership Council, the government agency responsible for the initiative, the necessary resources to promote it internationally (interview with author, December 2018). The partial commitment to non-extraction was also apparent in the spaces of government related to the initiative. There was a lack of clarity regarding where the responsibility lay amongst the Ministry of the Environment, the Ministry of Energy and Mines, the Ministry of Foreign Affairs and the Ministry of Finance (Rival, 2012). Three Ministers of Foreign Affairs and three negotiating teams resigned due to disagreements with Correa (Sovacool and Scarpaci, 2016).

At the same time, Correa grew increasingly hostile to what he deemed special interest groups, including environmental NGOs and activists who were increasingly criminalised and harassed (de la Torre, 2013; Goeury, 2021; Lewis, 2016). He also famously called environmentalists 'infantile' and argued that 'we cannot be beggars sitting on a sack of gold' (Becker, 2011). Therefore, the extent to which President Correa was really committed to the initiative can be a source of speculation. What can be argued, however, is that President Correa's contradictory public statements reflect the condensation of the social power relations within a government with a transformative political agenda which environmental interests had been able to put their stamp on, while simultaneously exactly relying on oil for the execution of this political agenda.

The distancing to civil society mobilisation and the attempted curtailing of a critical public sphere was a defining feature of the Correa government. The government's attempts to increase state autonomy and curtail the power of special interest groups included cooptation of civil society groups and only limited participation of non-governmental actors through specific channels rather than being receptive to a public sphere (Chiasson-LeBel, 2016, 2019). Once the initiative had been adopted into national (foreign) policy, the political space for civil society participation shrunk, and it was largely left out of the process (Arsel and Angel, 2012). The confusion surrounding the initiative's institutionalisation and the mixed signals from the tensions described above meant that no official dialogue with civil society or participatory mechanisms were initiated in the design of the international proposal, despite several key actors having recently transitioned from civil society to government.

The environmentalisation of the state 'did not require civil society actors to keep a (confrontational) distance from the state', as they saw it as taking initial steps in the right direction (Arsel and Angel: 216). Civil society actors believed that the initiative was safe once it was made into state policy, and they 'committed a very grave error: they withdrew' (Acosta, interview with author, December 2018). This meant that civil society was not putting constant pressure on the government, nor gaining international allies to put pressure on supporting countries (Acosta, interview with author, December 2018). Political struggles shaping state action include protests and political mobilising, and the positions and opinions of the environmental and indigenous movements at large did not continue to shape the initiative after it was adopted as state policy. This impacted the spatiality of the initiative, as will be discussed in the next section.

To sum up, Correa's first government constituted a political conjuncture where changing balances of forces were reflected in a partial and temporal environmentalisation of the petro-state.

As a result of the constellations of interests involved in government at that certain point in time, an idea from environmental civil society was incorporated into the core of government, yet in such a manner so that it would *not* entail a complete break with the hegemony of extractive accumulation, on which the state continued to rely on, and without civil society participation. If unconditioned non-extraction in the Yasuní had become state policy, it would have put environmental concerns and the interests of indigenous communities above that of capital and the oil sector, and it would have had a major impact on Ecuador's economy, its accumulation strategy, the institutions pertaining to it, its domestic structures of production and its integration into the world economy.[1] By designing the initiative as dependent upon international compensation constituting a certain sum, extraction in the ITT was never completely ruled out. If successful, such compensatory monetary transfers would have constituted a new form of oil rents, bestowed to the state as the resource-owner. Furthermore, the Yasuní-ITT Initiative as it was adopted into government policy was regarding one oilfield only, albeit Ecuador's largest, and it would not have meant an end to all oil extraction. Rather, oil was positioned as indispensable in the short and medium term throughout the existence of the initiative, to finance social policy programmes, infrastructure and human capital.

State spatial strategy

The Yasuní-ITT Initiative can be understood as a specific policy intervention with spatial dimensions. The state spatial strategy to internationalise the proposal to leave the oil in the ground, and to make the oil in the ITT field a global resource resulted from an attempt to reconcile conflicts of environmental and oil interests within the state. The Ecuadorian state's accumulation strategy was reconceptualised and reproduced through re-scaling. When President Correa presented the initiative internationally, he stated that, while Ecuador did not ask for charity, they did 'ask that the international community shares in the sacrifice and compensates us' (Martin, 2011a: 44). He went on to argue that 'in economic terms, what we would be doing is compensating for the generation of value', and by value meaning preservation of biodiversity, the protection of indigenous lives and ways of life, and mitigation of climate change through avoiding pollution (Rival, 2010: 358).

The Administrative and Leadership Council for the initiative met extensively with international actors and other national governments to garner support and promote compensation, attempting to utilise the global scale to their advantage. However, the international scaling of the initiative did not fit into the existing frameworks of global environmental governance focusing on curbing emissions through demand-side efforts. Reaching an international institutionalisation required negotiation and bargaining within existing governance frameworks, and, throughout the 6 years of the existence of the initiative, there was a gradual process to align it more with avoided carbon emission trading schemes, to better fit into the Kyoto-era framework of global environmental governance. In addition to direct donations from governments, organisations and individuals, the secretariat created Yasuní Certificates of Guarantee, which were given the value of 1 tonne of CO_2. These were pegged to the European Emission Trading scheme, but they were not tradeable. Through these certificates, the value of non-extraction of oil in ITT was reconceptualised. From emphasising leaving the oil in the ground for biological diversity and the rights of indigenous groups as a value in itself, there was a gradual economisation of its benefits, to make the initiative fit into discourses on and schemes for avoiding carbon emissions.

Le Billon and Kristoffersen argue that supply-side measures would benefit from (re)assertions of 'non-carbon' values of places, for example, through indigenous values and territorialities (2020). In the case of the Yasuní-ITT Initiative, the attempt to align it with non-carbon values was not conducive to international support. This is also a question of timing. Ecuador was a 'first-mover'

amongst states proposing to keep oil in the ground, and its timing was premature. There has later been a rapid growth in supply-side interventions to reduce carbon emissions in the past decade, and they are increasingly part of discussions on how to reach the emission reduction targets of the Paris Agreement (Carter and McKenzie, 2020; Gaulin and Le Billon, 2020; Pellegrini and Arsel, 2022).

State spatial strategy is produced and transformed by processes at various geographical scales, and this includes supra-national scales. In Ecuador, new spaces of national politico-economic resource governance were attempted through re-scaling, but this had to be aligned with existing political spaces of climate change mitigation as part of the demand-side reduction of carbon emissions. The initiative was therefore both constituted and constitutive of space. The ITT oilfield has been moulded into the global geographies of capital and the geographies of climate change mitigation, which encompass the global scale.

While the initiative developed through an interplay between the national and the international scale, it was characterised by a complete non-involvement of the local scale. One of the main strands of argumentation for protecting the Yasuní is that it is the territory of indigenous peoples living in voluntary isolation. These groups are naturally not participating in national politics, and their continued isolation and survival is defended by national civil society. Within the Yasuní there are, however, also Waorani and Kichwa groups, and *colonos*, small-scale farmers who have originally migrated from other parts of the country. Neither local people living in the Yasuní, nor local mayors and governors, nor organisations or local leaders had any input in the design of the initiative (Martínez, 2009; Rival, 2012).

The complete non-involvement of local grassroots movements in the Yasuní-ITT policy design can be understood as a result of Correa's anti-corporatist stance and apprehension to involve what he deemed 'special interest groups'. The lack of local-scale participation can also be understood as a spatial outcome of the state strategic selectivity favouring oil interests. More local-level involvement could potentially entail demands to leave the oil in the ground without international compensation, or costly local demands towards the oil producing state as conditions to extract. It could also have entailed an emphasis on the non-economic benefits of the initiative rather than the avoided carbon emission economisation strategy pursued by the government.

The purposeful re-scaling efforts of the Ecuadorian government towards the international scale demonstrates how the petro-state, despite a partial environmentalisation, did not have confidence in the local scale to impact the most important industry in the country. Moving towards the international scale was the less risky spatial strategy of the extractivist state. Conditioning the initiative upon international compensation constituted a scale-shifting of the responsibility for leaving the oil in the ground into a global responsibility. This scaling allowed for a sharing of the financial responsibility, but also as a potential legitimation strategy if the initiative was unsuccessful and extraction was decided upon.

Upon cancelling the Yasuní-ITT Initiative on 15 August 2013, President Correa stated that 'the world has failed us' (Presidencia de la República del Ecuador, no date). Internationally, Ecuador was able to uphold a green image of a supply-side first-mover, trying to establish new structures and mechanisms in global environmental governance, but ultimately not finding the means. Nationally, the state spatial strategy of making the initiative global meant that blame could be placed on the international community and on their refusal to compensate Ecuador, a country in need of oil revenues, for avoided emissions. Throughout the 6 years of the initiative's existence, there was, however, a concerted government effort to educate the Ecuadorian public on Yasuní's value and singularity on a global scale. The initiative's cancellation led to public demonstrations, and opposition has remained large. The lack of support internationally has therefore needed to be complemented by additional arguments for extraction, from the state.

The state has attempted to legitimate extraction of the ITT oilfield through two main strands of argumentation: first, through connecting the revenues from the ITT oil directly to immediate and

particular national economic needs, such as paying international debt and balancing the national budget, and more generally to developmentalist and Keynesian arguments to finance public services. Being able to demonstrate that oil extraction in the Yasuní has favourable economic results is 'the principal weapon' of the government to stave off public opposition to extraction, which the government previously cultivated (Dania Quirola, former Environmental Advisor to the Minister of Planning and Development and member of the Government's Yasuní-ITT team, interview with author, December 2018). Second, government officials and representatives from Petroecuador keep assuring that oil operations in the ITT are of the highest socio-environmental standards and that 'cutting-edge technology' is utilised, with oil operations utilising platforms and horizontal perforations, to minimise the area affected, alongside reforestation projects (Tarcisio Granizo, former Minister of the Environment, interview with author, December 2018). The need to legitimate oil production in the ITT oilfield is a direct political outcome of the state spatial strategy to convert non-extracted oil into a global resource and re-scale the political space for politico-economic resource governance.

Concluding discussion

The analysis presented in this article contributes to three different theoretical debates. Its first contribution is case-specific. Previous analyses of Ecuador's Yasuní-ITT Initiative to avoid extracting its largest oil reservoir in vulnerable areas in the Yasuní National Park have emphasised the unlikelihood and incredibility of it being precisely an oil-dependent country in the Global South that proposed the first major oil moratorium attempt internationally. Its cancellation is attributed to external pressures from the oil sector, and tensions between state actors and state and civil society (Finer et al., 2010; Martin, 2011a; Pellegrini et al., 2014; Sovacool and Scarpaci, 2016). This article has examined the initiative as a geographical process, and presents a re-interpretation of the reasons for its enactment and cancellation. Through adopting a state space approach, it argues that an oil moratorium attempt conditioned upon international compensation should be understood as state strategy attempting to reconcile conflicts of interests within the state.

This strategy constituted a re-scaling of the political space and tools available for an oil-dependent state in the face of increased pressures from environmental interests within the state. This re-scaling demonstrates how changing geographies of state intervention into socio-economic processes could ensure continued income from oil, either in the form of compensation, or by legitimising their continued existence as a petro-state and for business as usual if the attempt failed. Most petro-states continue to push for increased extraction (Le Billon and Kristoffersen, 2020). Fossil fuel producers tend to place the responsibility to act on emission reduction on the demand-side, implying that they will not do anything before they are forced to. The Ecuadorian government's official discourse is that they attempted to be first-movers, but the world failed them: a different type of legitimation that nonetheless legitimises business as usual, and the petro-state's status quo. This risk sharing internationally is as such a *result* of 'the entrenched institutions of the petro-state' (Kingsbury et al., 2019) rather than a long-shot paradoxical development facing numerous obstacles from the petro-state.

The second contribution of this article is towards the literature on supply cuts for fossil fuels, where there have been calls for further analysis of national policy trajectories and what makes an initiative successful or not (Carter and McKenzie, 2020). Supply-side measures such as keeping the oil in the ground are increasingly discussed as a necessary part of the policy mix to reach international emission reduction targets, with calls in 2021 from both the United Nations and the International Energy Agency (IEA) to put an end to oil exploration (IEA, 2021; UN Secretary-General, 2021). The timing of the initiative was, in this regard, premature. If supply-side policies are to become part of the 'climate policy "toolkit"' (Green and Denniss, 2018), then the

next steps of the Paris Agreement might entail a role for moratoriums, with or without compensation.

Carter and McKenzie identify the most conducive conditions for 'keep it in the ground' policies, and find that locally rooted campaigns, alliances between organisations both nationally and internationally, political opportunities and convincing issue frames are key factors (2020). Their analysis assumes that 'keep it in the ground' initiatives stem from civil society, as was originally the case for the Yasuní-ITT Initiative, but it also assumes that contentious politics and pressure on government is required to instigate such a major political shift. The analysis of the Yasuní-ITT Initiative offered here demonstrates how, firstly, such policy innovations can indeed stem from conflicts of interests *within* the state, and, secondly, such policies represent a continuation of petro-dependency rather than a disruption of it.

The latter point feeds into discussions on the spatialities of supply-driven energy transition (Le Billon and Kristoffersen, 2020), pointing to the third contribution by this article. The Yasuní-ITT Initiative was still an attempt to profit from fossil fuels, but through a novel strategy of non-extraction. Conflicts of interests continually constitute state strategy, and the Yasuní-ITT Initiative was a spatial outcome of the state's attempt at politico-economic governance encompassing both environmentalist and oil interests within the state apparatus, attesting to Bridge and Gailing's assertion that energy transitions are space-making processes (2020). The state spatial strategy entailed a re-scaling of the political space for resource governance, and changes to the geographies of petro-statehood and its spaces of state intervention. From a geographical-political-economy perspective, it can be argued that an internationalisation of attempts to move away from extractivism was a more likely choice than engaging with the local scale, where non-extraction without compensation could be risked. This implies an expansion of the repertoires of action available for petro-states to profit off of oil in new ways and sustain their accumulation strategies.

Beyond calls for further analysis of state–civil society relations in supply-side energy transition research, studies of the changing spatialities of energy production and consumption, including moratorium attempts, could benefit from employing a strategic-relational state space conceptual approach. Grassroots movements are often the first to propose especially moratorium proposals, but also other supply-side initiatives, such as divestment campaigns (Van Asselt and Newell, 2022). If adopted as state policy, divestments, extraction and carbon taxes and subsidy phaseouts (Lujala et al., 2022; van Asselt and Newell, 2022) can all be conceptualised as resulting from a condensation of conflicts of interests within the state reflecting socio-political struggles. Such an understanding can be useful for contextual analyses of supply-side climate policies, as it can help explain first why some proposals are adopted into state policy, second how their policy design is an outcome of attempts to appease different conflicting interests and third the resulting state (spatial) strategies. Examining recent histories of supply-side oil moratoria attempts in this manner can bring important insights on how to achieve realistic phase-out strategies.

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