

Electric Imperialism: State Power and the Renewal of Global Domination in the Chilean Energy Transition

The expansion of renewable energy carries the promise not only of an energy transition, but of a profound transformation in the global organization of capitalism and its associated relations of power. As recent interruptions to international gas and oil flows in the context of escalating geopolitical tensions have forcefully underscored, control over energy supply shapes who commands global capitalism, and how. This dissertation contributes to ongoing theorizations of these developments by interrogating the global political economy of the relationship between state and capital in renewable energy development.

The dissertation takes conflicts surrounding the renewable energy projects of the Norwegian state-owned power company *Statkraft* (State Power) in southern Chile as a point of departure to examine a broader dynamic in global electricity markets, in which corporatized state utilities have emerged as powerful global competitors. Chile, which has undertaken an ambitious energy transition strategy, has attracted a significant influx of foreign state-owned and -controlled electricity companies, subordinating its energy supply to the ownership and control of the corporatized entities of other states. The dissertation argues that what is taking shape in the Chilean energy transition, and which is violently expressed in the conflicts over Statkraft's Chilean renewable energy projects, is an emergent dynamic of electric imperialism and associated relations of dependency.

In developing the concepts of electric imperialism and dependency, the dissertation adopts an institutional historical-geographical approach to examine the divergent trajectories of power sector development in Norway and Chile, and how they come together, recombine and clash in the contemporary Chilean energy transition. The analysis is based on extensive archival and documentary research, with archives of the Norwegian Parliament and the Chilean Congress forming the empirical backbone, supplemented by policy documents, media sources, corporate materials, interviews and qualitative fieldwork in Chile.

On the one hand, the dissertation traces Statkraft's origins to the century-long Norwegian struggle for public power, and examines how the company was repurposed from the 1990s onward to adapt it to the conditions of neoliberal globalization. It shows how the Norwegian state has deliberately bolstered Statkraft through regulatory renewal, capital provision and strategic coordination, with the dual purpose of both protecting the domestic market from foreign takeovers and enabling Statkraft to assert itself in the increasingly competitive global electricity market. Electric imperialism denotes this simultaneous nationalization and internationalization of electricity capital, whereby the state

safeguards national energy sovereignty and equips its state-owned incumbent to assert itself in the global competition for renewable power.

On the other hand, the dissertation examines the historical construction of electric dependency in Chile. It traces how state-directed and owned electrification emerged in the 1930s as an anti-imperialist project aimed at reclaiming control over the material foundations of development, and how these institutions were dismantled from the 1980s onward through neoliberal reform. While Chile's contemporary energy transition is articulated as a project of energy security and sovereignty, reliance on foreign capital has given rise to a progressive denationalization of control over the resources and infrastructure of the green economy. This paradox is further compounded by the influx of Statkraft and other foreign state-owned and -controlled electricity companies that leverage entrenched historical relations of state power within their national borders to assert themselves in the competition for Chile's green economy.

Situating the historical geography of Statkraft and the institutional processes that have enabled the company's expansion in Chile within broader dynamics in global electricity markets, the dissertation argues that the energy transition is being shaped by the global competition among corporatized state utilities. Electric imperialism-cum-dependency thus denotes the production of a new geography of capitalist development in which certain states position themselves at the commanding heights of the emerging green economy. From these heights, they exert sovereign control not only over the natural resources and infrastructures that power their own economies, but also over corporatized utilities that expand abroad to secure ownership and control over energy systems elsewhere. Other states, by contrast, relinquish control over the forces of nature and the infrastructures of electricity supply, thereby also losing control over key material preconditions for economic development.