Decarbonization and Conflict Resolution: New Patterns of Peacemaking in Political Marketplace Systems and its Implications for the Clean Energy Transition

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Overview

This memo shows a new, and nuanced, relationship among conflict, peacemaking, and natural resources (particularly oil) in violent, transactional political systems (i.e., political marketplaces). It shows that the availability of discretionary oil rents impacts patterns of peacemaking—there are more comprehensive peace deals when there is more oil revenue and more limited deals such as ceasefires when that revenue decreases.

The research suggests that decarbonization—replacing fossil fuels with “cleaner” non-hydrocarbon-based forms of energy—carries a previously unidentified set of risks in certain contexts. Turning the “resource-curse” hypothesis on its head, “decarbonisation has an at least equally substantial effect compared with carbonisation...it may not be oil that causes conflict. It may be the loss of oil that causes conflict” (Pospisil 2021). This is most pronounced in cases of “traumatic decarbonization,” the rapid, unplanned reduction in hydrocarbon revenues in states which are dependent on such revenues to sustain their current political systems.

The urgency to halt climate change adds salience and direct policy relevance to this research and its primary findings. Environmental policy to address climate change hinges on decarbonization. It is central to meeting benchmarks set by the Paris Accords and efforts to realize a carbon neutral future as part of strategies to avoid calamitous climate tipping points. Missing from the climate change and decarbonization conversation, however, is analysis of decarbonization’s impacts on the politics of fragile oil-producing states.

This memo explores this relationship through the lens of the Political Marketplace Framework (PMF), which provides a logic for understanding the role of oil revenues in the context of violent, transactional political systems worldwide. In these systems, where governance institutions are weak, politics centers on transactional bargains among rival members of the elite rather than functioning under the rule of law. In such “political marketplaces” (PM’s), elites use material reward to sustain political bargains and peace settlements, alongside coercion. Concerned with short-term political survival, elite time horizons are short.
Political finance—i.e., the political budget—is at the center of the mechanism linking conflict risks and decarbonization. Oil revenue serves as a primary source of political finance to the extent that entire systems of government are constructed around it. Transitioning away from fossil fuels will eliminate this ready source of political finance, which risks upsetting the associated elite deals unpinned in precisely the contexts where governments are least well-equipped to manage the transition. This has implications for stability, violence, peacemaking, corruption, development and humanitarian outcomes.

The memo synthesizes research on decarbonization, conflict, and peacemaking with that of the Conflict Research Programme and the Peace and Conflict Resolution Evidence Platform. It further draws upon research conducted by the World Peace Foundation, including the “Carbon Compacts, Decarbonization, and Peace” project funded by the United States Institute of Peace and the World Peace Foundation. Empirical evidence comes from cross-national empirical evaluation of fragile oil-producing states and peacemaking outcomes, as well as case studies. Research was conducted by Shahla Al-Kli, Katrina Burgess, Javier Corrales, Joshua Craze, Tarun Gopalakrishnan, Jared Miller, Luke Patey, Jan Pospisil, and the authors of this memo.
The findings of this research do not represent a resurrection of the “resource curse” hypothesis—the notion that the presence of natural resources (principally oil) leads to poor economic development and growth outcomes, weak democratic institutions, and—depending on the iteration of the argument—a multitude of other societal ills, including conflict. The links among conflict, peacemaking, and natural resources are many. Direct monocausal explanations have been largely shown to be inadequate to capture the nuanced interplay of these issues. Indeed, peace and conflict research rightly favors multi-causal explanations for violence, focusing on poor governance, elite contestation, fragmented institutional configurations, and the politics of identity formation, among other factors.

Even if there is some degree of correlation between the presence of oil and conflict (see for instance, Fearon and Laitin 2003), ample evidence shows that resource curse studies do not pay sufficient attention to pre-existing patterns of political organization, and the extraordinary variation of geography, history, modes of governance and institutional organization across resource-rich countries. The category of oil producing states includes Canada, the United States, Norway, Russia, Brazil, China, Saudi Arabia, Nigeria, Libya, Iraq, South Sudan and Yemen. Such variation essentially precludes making cross-country comparisons among them. Instead, recent scholarship argues that the presence and intensity of the “resource curse” is largely context-specific and depends on the type of resources, socio-political institutions present in the country, and linkages with the rest of the economy (Papyrakis 2017; Van Der Ploeg and Poelhekke 2017).

Rather than using the presence or absence of oil to explain outcomes, the relevant point is to understand the transactional rules of the game that structure elite political behavior in these systems. The goal is to ascertain how—under certain political conditions—oil revenue filters into and through those systems. From this vantage, the emphasis is on the fact that oil is one of the greatest sources of political finance in transactional political economies. Many elite deals are solidified by oil money. The question then becomes, what happens to these elite deals when this pot of money evaporates, and with what implications for conflict resolution efforts?
Decarbonization, Political Unsettlements, and Political Markets

To answer this question, this memo combines theoretical elements from two related but distinct conceptual frameworks—the "political unsettlement" and the "political marketplace." Both frameworks focus on the functioning of "disordered" political systems.³

Political Settlements and Unsettlements

A "political settlement" can be understood as a "distribution of power across organizations" underpinning a particular institutional configuration in a country/political system, which "reproduces itself over time" (Khan 2018). This can be understood as a relatively stable or at least commonly accepted "balance of power" (Khan 2010), or the "forging of a common understanding usually between elites that their best interests or beliefs are served through acquiescence to a framework for administering power" (Di John and Putzel 2009). Political settlements may be dynamic, evolve over time, and involve both formal and informal institutions (Bell and Pospisil 2017).

On the other hand, a "political unsettlement" is a fundamentally disordered political settlement which emerges when chronic violence and turbulence disrupt and modify the functioning of these institutions. Political unsetlements are characterized "not just by political instability but by institutional instability, flux or even override... state structures may paradoxically find a measure of resilience through extraordinary mutation. Within these processes, no political position, no alliance, no interest is set in stone" (Bell and Pospisil 2017, 581).

Political unsetlements may be formalized by peace agreements (or peace processes which keep belligerents talking within an agreed framework), or by constitutional arrangements. These "formalized political unsettlements" are premised on the supremacy of public law and political institutions which "contain" rather than resolve conflicts. They provide ways of managing radical disagreements within society by establishing mechanisms that allow processes of negotiation to continue within these institutions. Often, it is assumed that the arrangements in these formalized political unsettlements will be temporary, to be replaced by a "proper" and "stable" political settlement in time. However, often they result in a kind of permanent "unsettledness," creating political dynamics which are indefinite and long-lasting (Bell and Pospisil 2017, 583).
The Political Marketplace Framework (PMF)

The PMF is an explicitly realist analytical lens with a set of empirically grounded assumptions about elite behavior that allows researchers and analysts to investigate how power operates (Sarkar et al. 2021). It incorporates persistent turbulence. The “political marketplace” (PM) refers to a system of monetized political governance in which formal institutions, laws and regulations are subordinated to transactions or deal-making (Spatz, Sarkar, and de Waal 2021; de Waal 2015).

Politics in PMs does not function as it does in states in which rational legal institutions regulate transactional politics. At the most basic level, political elites (mostly men) try to gain and retain power through near-constant bargaining using violence and material reward, which act as the “twin currencies” of political power (Spatz 2020; Sarkar et al. 2021; de Waal 2015). Key to power is the ability to mobilize and control the means of violence and material reward (“cash violence”). As a result, the core business of elite players in PMs is to secure discretionary cash or the ability to grant or withhold access to material rewards (e.g., bribes, contracts, formal and informal licenses to operate/predate in certain areas, etc.). Material inducements are then used to buy or rent loyalty and/or violent capabilities (Sarkar et al. 2021; Spatz 2020).

PMs usually manifest as a type of indefinite “political unsettlement” in which turbulence is managed by informal rules (manifesting some of the same skills and stratagems utilized for formalized political unsettlements). Elite bargains in PMs are only likely to hold if the political market conditions in which they were struck persist and the senior members of the elite who set the rules remain in place and do not change their rules. Alliances are fluid; elite members can compete one moment and collude the next, and often do both simultaneously. Where democratic institutions and practices do exist, they are effectively subordinated to the tactical calculus of elite negotiations. Political actors in these contexts conform to these basic rules; failing to do so jeopardizes their political viability and goals. Even those who attempt to chart a different course—such as individuals pursuing a “democratic” reform agenda—are obliged to work within these rules, and take risks when they break them.
Applying the Two Frameworks to Decarbonization

These theoretical frameworks provide a set of guiding empirically-based assumptions about how politics is conducted in disordered political systems. This allows researchers and policymakers to understand how processes of decarbonization will be understood by the leaders of those systems (i.e., as threats to key sources of political finance used to maintain power) and how decarbonization itself will materially impact the shape of these systems' political economy with knock-on effects for political incentives and decision-making.

There are key differences between the theories (most critically, the primacy of 'transactions' in the PMF) as well as key points of convergence. However, both are concerned with understanding politics – or how power originates, the forms it takes, and how it is distributed and controlled (Leftwich 2004) – in fundamentally disordered political systems. Neither is a theory of everything. The PMF, in particular, is not "economically deterministic" – it is closely intertwined with, and operates alongside, other political logics such as exclusionary identity formation (Kaldor and de Waal 2020). Not all actions are permissible in the pursuit of power in PMs. Political markets, like all other markets, are socially embedded; societal norms shape the market (though norms evolve over time), and certain actions are clearly proscribed.

The rules can be summarized in four guiding principles:

1. **Transactional politics trump institutional governance:** transactions—or elite deals—dominate formal institutions, rules-based governance mechanisms, laws, and regulations; short term gain (or survival) trumps long term planning.

2. **Follow the political money:** violence, which requires finance to control and manage, and material reward structure elite dealings as they pursue political power.

3. **Everything is political:** war, peace, repression, and corruption, as well as development and public policy, should be viewed through the prism of elite-level political dealing.

4. **It's an elite game.** Distasteful though it may be, elites dominate and instrumentalize populations and public policy.
Analysis of the impacts of decarbonization on peacemaking was conducted by Jan Pospisil (2021). It is based on the University of Edinburgh’s Peace Agreements Database (PA-X), a comprehensive set of publicly available written peace agreements from 1990 to the present. It includes 1,868 peace agreements from 160 different conflict dyads, distinct episodes of armed conflict-related peacemaking. The database utilizes a six-part typology of peace agreements (in parentheses as they are displayed on the subsequent graphs): ceasefires (Cea), pre-negotiation agreements (Pre), substantive partial peace agreements (SubPar), substantive comprehensive peace agreements (SubComp), implementation agreements (Imp), and renewal agreements (Ren). To compare the effects of oil revenue and carbon revenues on peace processes, the 160 conflict dyads were narrowed down to 54 determined to be "carbon-related dyads." These were positively identified when a dyad included a country with oil revenue over 1 percent of GDP.

The analysis, and the subsequent graphs, do not indicate causation. However, when paired with a theoretical orientation of the political marketplace framework and political unsettlements, the mechanism behind the trends identified in the descriptive statistics begin to take shape.

Evidence: Decarbonization and New Patterns of Peacemaking

Cross-national data suggest that the availability of discretionary oil rents impacts broader patterns of peacemaking. Graph 1 displays disaggregated peace agreement data from the carbon-related dyads and shows far fewer agreements, but relatively more comprehensive ones as oil prices spike versus when oil prices are low. This trend is only visible in the carbon-related dyads. Graph 2, which displays data from non-oil dependent economies (i.e., the full data set of 106 conflict dyads), shows that the overall number of peace agreements in non-oil-dependent economies is, by and large, stable. Further substantiating this finding are data comparing oil prices and the average length of the signed peace agreements (in pages) in the 54 carbon-related dyads versus and the full 106 non-carbon dyads. Length measured like this is a reliable proxy for comprehensiveness—the longer an agreement, the more comprehensive it usually is.
Graph 1: Peace agreements in countries with oil revenue over 1% of their GDP (54 dyads)

Number of peace agreements per year / line: average crude oil price / barrel in USD
Graph 2: Peace agreements in countries without significant oil revenue (106 dyads)

Number of peace agreements per year / line: average crude oil price / barrel in USD
Evidence: Decarbonization and New Types of Peacemaking

More than just whether peacemaking writ large is increasing and decreasing, the pattern reveals a striking difference in the type of peacemaking. The pattern is primarily caused by divergence in numbers of ceasefires (dark blue) and the comparably high number of substantive partial agreements (gray) and substantive comprehensive peace agreements (yellow). Ceasefires dramatically decreased in periods of high oil prices and increased in periods of low oil prices. The partial and comprehensive peace agreements appear to move in the opposite direction. This points to remarkable differences in how violence ends when oil rents are or are not flowing. Phrased differently, more comprehensive political agreements are associated with higher availability of political funds, and more limited deals tend to occur when money is tight.

The rationale becomes clearer when the data is matched with the rules of the game in violent, transactional systems. During "boom" years of high oil prices (and thus relatively flush political budgets), elite rivals have greater incentive to establish a more-or-less inclusive political bargain for a share of oil-largesse. Thus, there are fewer overall peace agreements, but the ones that are signed are broader and appear to last longer—or at least as long as the oil rents are flowing. These agreements are essentially "carbon compacts"—elite deals to divide oil wealth among themselves. When oil prices fall, however, the deals break down. Elite bargaining shifts toward violence. Military-political entrepreneurs faced with shrinking political budgets deploy violence as a bargaining tactic as they seek to carve out as much as they can from an ever-smaller pie. It is these short-term, violent patterns that are picked up in the increased number of ceasefires relative to more comprehensive agreements. The ceasefire agreements are essentially tools to manage violent bargaining, but they are inherently unstable.⁹
The Data Reveal Deeper Truths About Violence

These data reflect a deeper truth about the nature of violence in transactional political systems. Distinct categories of "war" and "peace" collapse. Many exist in a state of "inter-war" where political negotiation and economics are both shaped by coercion and the always-impending threat of violence. This relates to the fundamental rule of transactional systems that the twin currencies underpinning elite bargains are violence and material reward. "Peace," too, is rarely free of violence. During ostensible periods of peace, Venezuela continues to experience some of the highest homicide rates in the world. In Iraq, violence has been deployed strategically by militia to extort funds, to suppress protests and target civil society leaders. In Sudan too, the oil boom coincided with conflict in Darfur where the government-sponsored paramilitaries in due course demanded a high price for their loyalty.

The Paradigmatic Example: South Sudan

Oil revenue was critical to the violent contestation between Sudan and newly-independent South Sudan. Before the 2005 Comprehensive Peace Agreement (CPA), oil rents enabled President al-Bashir to bid for the loyalty of armed groups in southern Sudan, fueling a well-established divide and rule strategy to counter the main military rival, the SPLM/A.

From the signing of the 2005 CPA, elite dynamics changed as South Sudanese rival elites used their newly obtained access to oil revenues to secure the loyalty of military commanders, replacing pillage and aid diversion as the SPLM/A’s primary source of revenue. Violence became a means of bargaining used by armed actors to get a share of government payoffs. This was an inflationary political system, with the price of loyalty increasing faster than the increase in oil revenues. Commanders and provincial leaders would mutiny to lay claim to a share of oil rents, drawing violent responses from the government of South Sudan—and the cycle of violence would continue until a formula for allocating material reward had been agreed between the parties. Until, of course, the parties re-assessed their relative strengths, starting the cycle of rent-seeking rebellions all over again.
The self-inflicted collapse of oil rents in 2012—when South Sudan shut down its own production—meant that the government in Juba could no longer pay for its "big tent" patronage buy-outs. This was a main factor that combined with mismanagement of political tensions to spark civil war. From that point onwards, the competing factions shifted the basis of South Sudan’s patronage system from dividing oil revenues to predation; armed groups taxed and raided populations under their control. This has only intensified elite dominance, inequality, and misery among many South Sudanese.
Implications for Conflict Resolution

Decarbonization appears to have direct and widespread impacts on patterns and types of peacemaking. There are three other implications for conflict resolution research and policy that conflict managers will need to recognize and incorporate in peacemaking efforts.

Transactional Political Rules are Durable

The rules of these political systems are “sticky.” Decarbonization reshapes these states’ political economies, creating winners and losers, and reconfiguring elite political constraints and incentives. But, even if the specifics change (i.e., the dominant elite players, available sources of income, tactics to obtain power, etc.), the fundamental nature of these systems does not. They remain elite-dominated, transactional, rent-seeking, often-violent, and remarkably resilient.

Tactics may change. When decarbonization causes rapid revenue shortfalls, politicians look for alternate revenue sources, make calculations about which constituencies need to be satisfied immediately, which can be postponed, and which can either be discarded or violently suppressed. The result might look like fundamental political instability; it is better understood as a manifestation of “turbulence”—day-to-day changes in the conduct of politics. This challenges traditional notions of peacemaking and conflict resolution formulae.

What this means more broadly is that there are few, if any, “off-ramps” to non-transactional political systems even under severe economic strain. All cases examined show that the elite sought to maintain their control; most witnessed some form of large-scale non-violent protests during or after decarbonization. The protests followed a well-established pattern: they were sparked by material issues—such as, the price of bread, unemployment, the lack of electricity during summer—and then expanded to demand broader systemic change.
The protests resulted in only temporary and superficial change, as examples from Iraq, Nigeria, and Sudan illustrate. Iraq saw historic levels of protest in 2019 after the economy cratered from the dramatic dip in oil prices. However, the protests aimed at confronting corruption and violence ended in repression and elite retrenchment. Security forces opened fire on protesters killing and wounding hundreds. Political parties and militia also deployed other tactics with impunity, including targeted assassinations, detention, torture, and intimidation of civil society and activists. In Nigeria, the #EndSARS protests, referring to Nigeria's Special Anti-Robbery Squad, began in 2020 after the SARS killed an unarmed civilian; it grew to encompass public outrage over corruption and governmental abuse of power. The protests turned violent, were met with repression and despite the disbandment of the Special Anti-Robbery Squad in name, other paramilitary units have carried on as before. Sudan's popular uprising in 2019 helped push out Omar al-Bashir, but the transitional government that replaced him was soon undermined by military leaders and ultimately overthrown in 2021.

Ecuador is the lone outlier among the cases examined. The differentiating factor: the relative strength of its pre-existing formal institutions vis-à-vis elite deal making, and the limited role of the military (and other violent groups) in politics. In all other cases, publicly-minded institutions have not taken the reins of policymaking and civic protest movements have not proven able to break the rules.

**Decarbonization Leads to Immiseration of Populations**

Loss of carbon revenues causes immiseration of the general populace, often through violence, which indicates an urgency to peacemaking in these situations, even if those peacemaking efforts are challenged by the very nature of politics in these systems.

Decarbonization is often the catalyst, but not the sole cause of immiseration. The decline in oil rents causes budgetary shortfalls and precipitates macro-economic crises. In the cases examined, governments either ignored the crisis, or exacerbated it through (a) their efforts to find alternate sources of rent and (b) the often-violent methods they used to extract that rent. The causal path begins and ends with the transactional and violent rules of the game.
Violent predation became even more pronounced in South Sudan after the loss of its oil revenue. This led to a renewal of patterns of predation: armed actors are "licensed" by the ruling elite in Juba to prey on the population at will, and tax and divert humanitarian aid. These violent processes have been accompanied by the enclosure of land using processes of formal land tenure and coercive land purchases, putting ever-increasing tracts of land in the hands of the elite and forcing new patterns of labor to emerge that disadvantage all but the wealthiest. All of these factors make peacemaking in South Sudan all the more urgent and difficult.

Hunger also accompanied these processes and while not directly tied to peacemaking efforts as such, the deteriorating humanitarian situation presents another facet to the challenge. Venezuelans darkly joke about the "Maduro-Diet", a reference to widespread food shortages and extraordinarily high inflation, which caused rapid increases in both malnutrition and infant mortality. In Sudan, rural Sudanese have gone hungry for generations even as wheat subsidies funded by oil revenues subsidized urban diets. Post-oil cash shortages spurred elites to cut these subsidies and this has flattened the differences in hunger between peripheries and urban centers of the country, effectively bringing hunger into Sudan’s cities. In Nigeria, too, when oil revenues plummeted, the government imposed austerity measures that slashed funding for health and welfare, placing further pressures on the vulnerable.

Planning for a Green Energy Transition

The gradual reduction—and ultimately elimination—of carbon-based energy is a reality that presents many political and technical challenges. This research surfaces another directly related to peacemaking: the loss of oil revenues has implication on elite politics, war, and peace in oil-producing fragile states. For peacemakers, this raises a host of issues about the durability of previously "resolved" conflicts while also providing a framework to begin to assess warning signs of potential future conflicts. Grappling with the interconnected challenges environmental transition, conflict, and peacebuilding require a new research and policy agenda that applies a theory of politics to the issues. This framework can also assist policy makers more broadly to recognize and mitigate risks associated with a planned global decarbonization process as well as “traumatic decarbonization” and its particularly destabilizing impacts.
References


Since there has not been a global transition away from hydrocarbons, the research summarized in this memo applies lessons from the recent past to an uncertain future. It is based on cross-national data and identification of six illustrative instances of loss of oil rents, including cases of de facto decarbonization over the past decade, which serve as a proxy for future decarbonization: Ecuador, Iraq, Nigeria, South Sudan, Sudan, and Venezuela. Assessing these countries’ recent experiences yields insights into what is likely to happen in other hydrocarbon-dependent political systems in the future.

See further Pospisil 2021. An additional line of criticism leveled at resource curse studies is its “pessimistic [economic] determinism” which do not pay adequate attention to “subaltern” efforts to resist the resource curse. For example, attempts to use oil resources predominantly for national development, or a complete rejection of extraction (Riofrancos 2020). These approaches have often articulated alternative ecological principles and inspired people. They may also lead to the formation of alliances between civil society groups, but the experience of resistance movements in many resource dependent countries suggests that they are often repressed, co-opted or otherwise brushed aside. Nonetheless, the “resource curse” framing is too limited a look at the challenge.

Both evolved from, and as a reaction to, the “new institutional economics” (NIE) approach (North 1990; North, Wallis, and Weingast 2009). NIE sought to explain differential trajectories of development and conflict through analyses of “institutions” defined as the “humanly devised constraints which shape social interaction”. Phrased more simply, these are the rules of the game.

These are adapted from Spatz, Sarkar, and de Waal 2021.

The corpus of peace agreements signed at the national and international level is by and large complete. The collection of so-called “local peace agreements” produced at the subnational level is progressing but not comprehensive. Nevertheless, for the macro-comparison in this article, both agreement types were included. See Bell and Badanjak 2019.

One country can have several peace process dyads, going on subsequently or in parallel.

Several countries with significant oil production have seen more than one peace process dyad, such as Libya with three, Iraq with two, or South Sudan and Sudan with, in total, nine. Other countries with a high number of negotiated peace agreements identified in this category due to the significant role of oil revenue for its GDP include Russia (three dyads), Colombia (six dyads), Indonesia (including East Timor and Aceh, three dyads), Syria (three dyads), and Yemen (three dyads).

Based on available World Bank data.

Pospisil 2021

In this too, Ecuador is an outlier.

Debos 2016

Burgess and Corrales 2022. This is not directly related to decarbonization, however.

In 2019, party and state militia opened fire on demonstrators agitating for reform – killing and injuring dozens, while intelligence and security forces co-opted by the parties targeted and threatened key leaders of the protest movement in an effort to deter future protests. al-Kli and Miller 2022; Skelton and Ali Saleem 2020
Common tactics for filling political budgets include: (a) cutting spending on public goods and services; (b) mortgaging future oil production for cash-in-hand (often at a large discount); (c) securing other forms of legal commodity extraction including the sale and allocation of licenses to exploit the commodity itself; (d) rent-seeking through illicit and semi-licit activities including trafficking of narcotics, smuggling, extortion, and protection rackets; (e) preying on populations, including the plunder and seizure of land, directly as well as indirectly issuing licenses for such predation as non-cash rewards to secure loyalty.
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