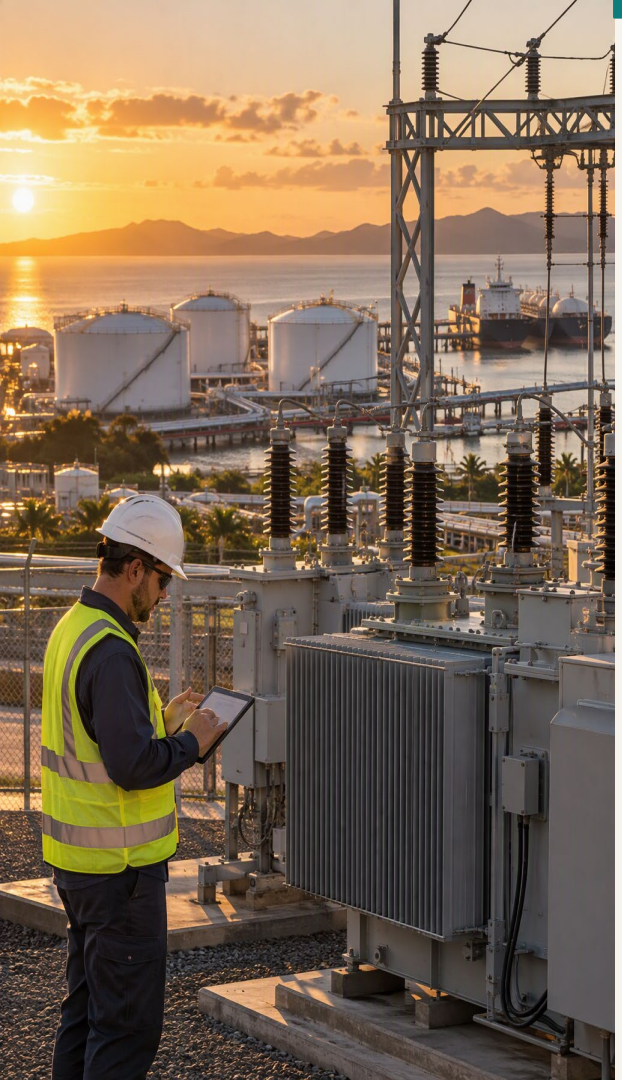


GEOPOLITICS OF ENERGY SUPPLIES

IEM

Test What You're Counting On

The event may look familiar. The assumptions underneath it may not.

Availability
Will it be there when we need it?

Timing
Does it still arrive on the schedule we assumed?

Backup sources
Is the backup truly independent?

Outside capacity
Is someone else counting on it too?

Start with what you have

What do we know? What are we assuming? What haven't we verified?

Use what you have. Test what you're counting on.

Test It Before an Event Does

OREGON Asking the questions before an event

WHERE IT'S MADE

~90%

of refined fuel comes from refineries in Washington

HOW IT MOVES

~90%

of liquid fuel moves through one Portland hub

Consequence-based planning: start from what happens to people and services, then test the plan under today's conditions.

FINLAND When the backup got tested

MAY 2022

Russia cuts off electricity and pipeline gas

BACKUP IN PLACE

Gas shifts to a pipeline from Estonia; a second route by ship is secured

OCT 2023

The Estonia pipeline is damaged and out ~6 months; the ship route keeps gas flowing

Know what must keep working, what it depends on, and who controls it.

From Findings to Decisions

The Energy Office owns the planning question. Partners hold parts of the answer.

- Suppliers & utilities
- Manufacturers
- DOE
- Transportation
- Emergency management
- Regulators
- Neighboring states

Fix it now

Confirm or correct an assumption with better information

Fix it with what you have

Use existing procedures, roles, contracts, and schedules

Make the case for more

Show what it costs and what it buys in reliability

Document it: the assumption, the evidence, and who confirmed it.

Then build it into your plans, procurement, and budgets.

Start With One Dependency

Understand

Pick one dependency tied to work already underway

Validate

Test the four assumptions with the partners who know

Act

Improve what you can; be clear about what needs more

Sustain

Revisit when suppliers, lead times, or events change

Use what you have. Test what you're counting on. Be clear about what needs to change.

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