

LESSONS FROM LATIN AMERICA*

Augusto Heras

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KEY MESSAGES

1. Competing energy coalitions are mediated by the state
2. Counter-hegemonic coalitions promote counter-narratives
3. Policy instruments can potentially LFFU

INTRODUCTION

This brief examines how fossil fuel supply politics unfold in the Global South, analysing how State, governmental and civil society energy coalitions shape policy pathways to LFFU. Through three Latin American cases – Argentina’s unconventional gas expansion in Vaca Muerta, Brazil’s offshore exploration near the Amazon, and Colombia’s pledge to halt exploration – it examines energy politics as battle-settlement events: policy struggles whose outcomes shape future debates and actions but remain open to challenge or reversal (Patterson & Paterson, 2024).

COMPETING ENERGY COALITIONS ARE MEDIATED BY THE STATE

Across the three cases, energy politics unfold as a sequence of unsettled confrontations in which the State as a site of contestation mediates among social forces (Newell & Daley, 2025). In Argentina, macroeconomic pressures cast oil and gas as pillars of stability and external debt service, entrenching a “fracking consensus” and a governing alignment between State institutions and industry. Liberalisation, an export-oriented LNG push, and market-led renewable integration tighten this grip, while experts reframe developmentalism as energy addition to fund the transition, re-industrialisation, and employment. Civil society networks and Indigenous organisations, – strongest in territories directly affected by fracking and climate impacts – mobilise research, advocacy, and litigation to reframe development toward justice and post-fossil alternatives.

Brazil presents a tension between climate leadership and persistent interests in expanding fossil supply. A “no-contradiction” coalition centred on Petrobras binds state-business strategies to present oil and gas as instruments of development and energy security. Expansion leans on flawed narratives of low-carbon oil and technological pragmatism, while a hedging strategy (DeBoom, 2025) channels prospective fossil revenues into green hydrogen, biofuels, and CCS. Within the State, change agents seek to insert climate criteria into environmental licensing and fiscal planning, creating procedural friction. Civil society coalitions add pressure through advocacy, litigation, and ‘counter-NDCs’ that demand a concrete phase-out plan.

Colombia features an overt confrontation over phase-out, with counter-hegemonic actors temporarily inside the State. The current government, supported by multiethnic and environmental movements, reframes the fossil-based economic model as unviable, because of vulnerability from international fossil fuel markets, injustices tied to extractivism, and the need to adapt to other

countries’ decarbonisation. Measures such as a no-exploration pledge, a Just Energy Transition roadmap, and energy communities aim to democratise energy governance, but, amid implementation bottlenecks, face backlash from incumbent coalitions in the name of energy security, fiscal stability, and employment. Across the three countries resistance and accommodation by incumbents reproduce lock-in and unequal outcomes.

COUNTER-HEGEMONIC COALITIONS PROMOTE COUNTER-NARRATIVES

Agent of change in the form of meta-coalitions (Salmi et al., 2024), including social movements, NGOs, political leaders, and policy entrepreneurs within the State, promote comprehensive visions of just energy transitions, that encompass workers and affected communities, human rights and energy democracy, recasting transition as a collective, civilisational shift that addresses extractivism, colonial legacies, inequality, and climate vulnerability. Practically, these counter-hegemonic coalitions advance policy instruments to close the extractive frontier, alleviate political economy and socio-economic constraints, and support productive diversification. By leveraging courts, State agencies, and ministries, they strengthen Environment Impact Assessments (EIAs) and influence NDCs through legal enforcement of rising ambition or the production of counter-NDCs to press delivery on international commitments.

POLICY INSTRUMENTS CAN POTENTIALLY LFFU

Some Southern countries, like Colombia, are politically leading the shift away from fossil fuels by not issuing new exploration licenses, with nonetheless significant constraints. As a supply-side instrument, this pledge could divide incumbents’ investment strategies and reduce exposure to asset-stranding. However, it may lead to domestic polarisation, political backlash, and failed reforms. Therefore, effective supply-side policies in the Global South requires political groundwork that builds domestic legitimacy and careful sequencing and prioritisation, given the bounded autonomy and limited capacity of Global South States (Newell, 2025; Newell & Carter, 2024). For agents of change, this involves forging broad societal consensus to prevent policy rollbacks and fostering institutional learning to preserve spaces obtained within the State.

CONCLUSION

Taken together, these cases showcase how energy coalitions emerge and deploy resources to advance competing narratives about fossil fuels. Embedded in national political economies, the narratives reveal tensions within both incumbent and transformative camps, and between ministries and State agencies, or between progressive civil society, workers, and experts. Incumbent resistance and accommodation, evident in Brazil’s exploration license and Argentina’s *Leap for LNG*, reproduce stranding risk, lock-in, and unjust outcomes, yet these battle-

settlement events remain open-ended, shaping forthcoming debates, like Argentina's energy and macroeconomic outlook until the 2027 elections (FF NPT, 2025). Also, following Brazil's role as COP30 host and Colombia's co-hosting of the First International Conference for the Phase-Out of Fossil Fuels have resulted in incumbent actors seeking to preserve the legitimacy of fossil fuel sources, while counter-hegemonic coalitions initiate climate and social justice.

Southern countries can advance just and equitable fossil fuel phase-out strategies but face significant constraints. Colombia shows both promise and risk: restricting exploration licenses and promoting a no-new-fossil-fuel norm can reduce asset-stranding risk and challenge incumbents (Green et al., 2024; Green & Denniss, 2018). To avoid domestic backlash, success requires careful preparation of the political and institutional terrain, domestic legitimation, and policy instruments that mitigate political economy and socio-economic constraints and foster productive diversification. Sequenced interventions, including no-new-exploration pledges, Just Energy Transition roadmaps, and energy communities, combined with societal consensus-building and institutional learning, can preserve policy space, reduce polarisation, and advance LFFU in the Global South.

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