

An Economic War on Energy

Oil has been near the center of every economic and geopolitical turmoil over the last hundred years. Now with negative oil prices we are entering unprecedented territory. As Russia and Saudis fight for market share, even our Saudi allies seem to be working against the US energy industry. Many American politicians are ready to give America's energy independence away. At the same time ESG funds put a globalist agenda above investor returns with their focus on slowing economies to reduce carbon emissions. While in the short term you may not feel it, make no mistake there is an economic war on oil and energy. Your life and livelihood will be collateral damage!

"Putin and Russia saw this as an opportunity to increase market share and they're worried about the success of the American shale industry." -Kevin Freeman

Your Mission: To understand the foreign and domestic threats in the economic war on oil and what is really happening today. Also, why energy independence is critical to America's economic recovery and what you should do.

"The Economic War on Oil is an attack on the United States and in a certain way an attack on President Trump. If you crash the economy before the election, you hope to change the outcome."

-Kevin Freeman

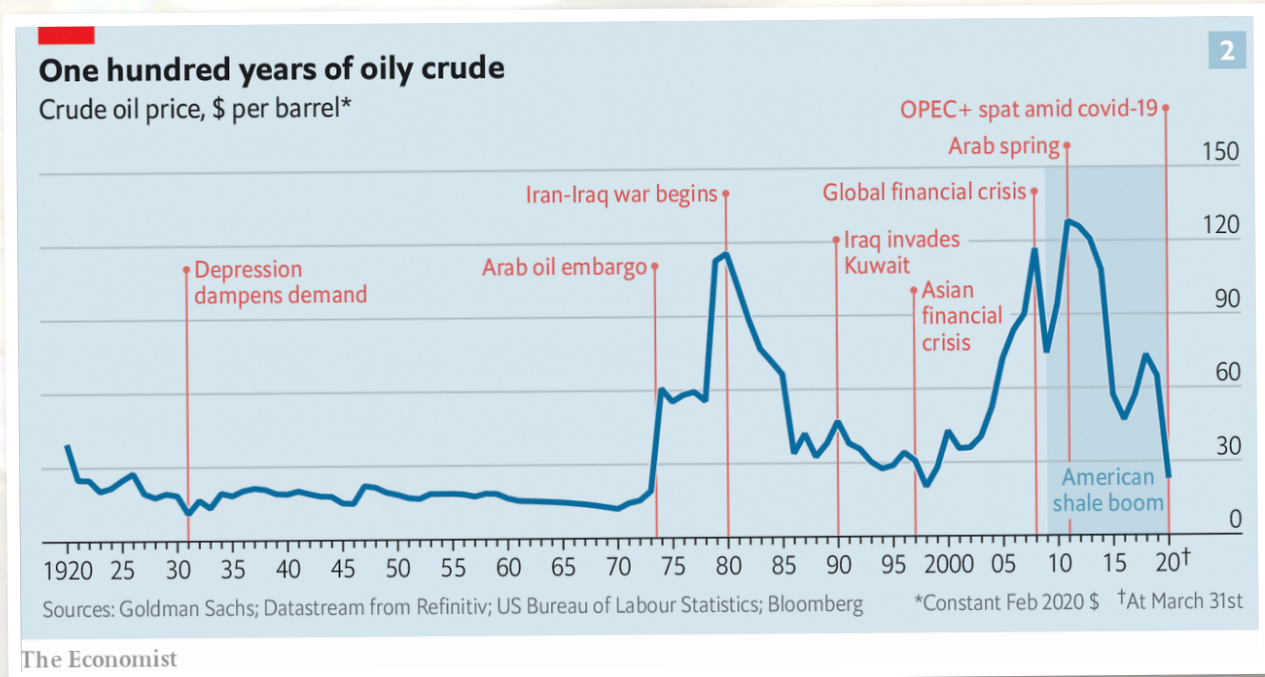


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Ep. 3.85 (OSINT) Open Sourced Intelligence Briefing. This includes quotes and summaries from Kevin Freeman and Troy Andrews. Troy is Co-Founder and CEO of Paradigm Mid-Stream, LLC. He has more than 28 years of experience in the oil and gas industry with a focus on project development, team building, wellhead gathering, gas processing, NGL supply/logistics and finished fuels marketing.

1. Negative Oil Prices, what it really means and how we got here:

- » With the coronavirus lockdown, the price of oil has collapsed. A dozen years ago it was almost \$150 per barrel. Now it has dropped to below ZERO. Obviously, recent prices are not sustainable. But what happens going forward? These are remarkable price swings.



<https://www.economist.com/briefing/2020/04/08/an-unprecedented-plunge-in-oil-demand-will-turn-the-industry-upside-down>

"If you take a barrel today and you just hold on to it, it's going to have value three or four months from now. So it pays to actually take a barrel, put it into storage. All of a sudden, for the people that have storage oil could be a valuable asset. But we are running out of storage."

-Troy Andrews



What is driving these market conditions – It is about Demand Collapse and Over Production.

We saw this coming and reported on it.

CNBC - Coronavirus oil prices could turn negative as storage nears capacity:

<https://www.cnn.com/2020/04/01/coronavirus-oil-prices-could-turn-negative-as-storage-nears-capacity.html>

- Demand collapse from shutdown of the COVID 19 economy
- Storage filled to near capacity or inaccessible (1 billion barrels storage can't be reached)
- OPECs 3-year production cap expired
- Saudis are unwilling to cap production
- Putin/Russia unwilling to cap production
- **The Success of American Shale Industry has created more capacity.**
- Unwillingness to cap wells due to cost, so oil is being sold forward to keep pumping

Oil prices turned negative as storage reaches capacity:

"Refineries in many places are now losing money for every barrel they process, or they have no place to store their output of oil products," -Bjarne Schieldrop, chief commodities analyst at SEB

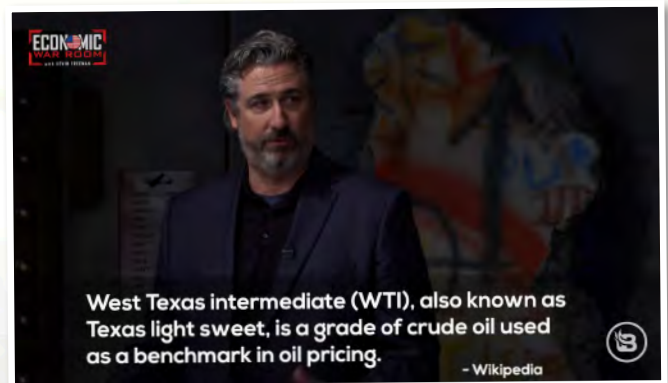
“As you look at the distribution of oil from the well, there’s a big trading environment in the midstream energy markets. They are trading things and moving rail cars to lower already low energy prices. Exploration and Production companies are really getting hurt right now from the mid-stream traders based on supplies.”

–Troy Andrews

The Result - For the first time ever we are seeing negative oil prices.

“We’re actually in a situation right now where we are in negative oil prices. Every single well has a netback price. So that means that wherever that well is in the country, you’re producing barrels at that well, you’re producing crude, you’re getting gas out liquids and gels, those sorts of things. But you’ve got to get that oil to market. **And a market hub is where oil trade is.** When you see crude oil prices, WTI prices in the \$20 range, that doesn’t necessarily mean that equates to the price that they have at the wellhead.”

- Every single well costs a certain amount of money to frack.
- And then you’ve got to get that product to market.
- You’ve got to pay pipelines.
- You’ve got to pay processing and all those sorts of things to get it to that trading hub area where price trades at.
- Typically when you get out into the field, there’s a differential price to the NYMEX (New York Mercantile Exchange) that people trade in those local markets.



“Across the shale industry, we’re in a negative situation. Most every producer who is producing crude today, if they don’t have hedges in place, then they are in a zero or a negative situation.”

–Troy Andrews

With overproduction, capping wells is a last resort.

- Nobody wants to cap the wells because when you cap a well, it's expensive and it's hard to get it restarted.
- You want to keep the oil pumping because it would actually be better to let other people take the oil for a short period of time while we have this price depression, than it would be to stop the production.

2. A look at America's fracking industry and the positive impact on America's energy independence:

- » **America's fracking industry is resilient and typically bounces back.**
- » **Our US shale industry has all this infrastructure already in place. The wells are there.**

"The oil's there. And really these situations create what I like to say, economic alchemy. The frackers learn to do better and they get better and better." –Troy Andrews

- » The independent entrepreneurs were developing wells when oil prices were much higher.
- » The Trump administration really allowed the American energy industry to grow to the point where we were a net exporter of oil with normal market conditions.
- » The US became the world's largest energy producer thanks to the heroes of the shale industry. And it really has changed the global economy.

"Look, there's going to be people that have to file bankruptcy and restructure. The banks are going to get hurt. The service industry is hurting. Many people are going to lose their jobs. So those things happen and those are bad things. I'm not making light of that at all. But from a macro perspective, as you're looking at the energy space, you're just not going to destroy our energy business. All you have to do is shut it down and then turn it back on when prices are back." –Troy Andrews

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3. America's Fracking industry is under attack.

A. Putin and the progressive left want to destroy our energy production.

Putin clearly hates the American shale industry.

- He's paid money to environmental groups to oppose fracking.
- He's been caught time and time again undermining fracking on a global basis.

The USA's Message to Putin:

The technology doesn't go away although some companies may go bankrupt. The assets are still there. And the next time you try and drive prices up. American ingenuity and the shale industry are going to be ready to bring the oil to market.

B. Our Energy Industry is also being attacked by Saudi Arabia one of our own allies:

As it relates to Saudi Arabia our supposed ally (From CNBC)

Senator Cruz warns Saudis to Stop Using Oil in Economic Warfare Against US

"...listen, there are a whole series of steps we can take to escalate foreign policy pressure. We outlined a number of them. If you continue engaging in economic warfare against the United States, trying to drive down the price of oil in order to try to exploit this coronavirus crisis, to drive a bunch of American producers out of business, I'm hopeful the president will echo that same message and I hope the Saudis will hear it."

-Senator Ted Cruz

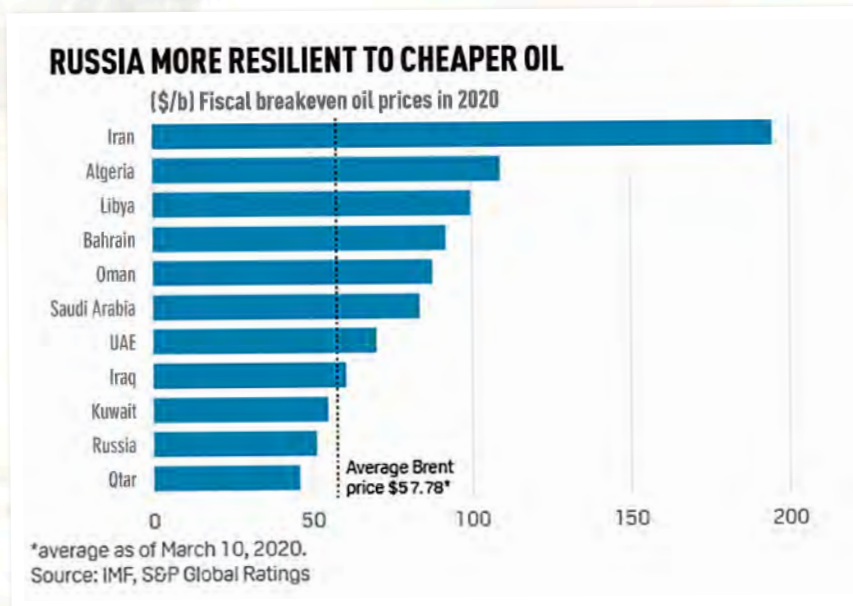


4. Understanding the Foreign threats to US Energy.

A Look at The Resiliency of Saudi Arabia and Russia as it Relates to Oil Prices and this Economic War.

The break-even points vary by country. Saudi Arabia's long-term minimum target is around \$80 a barrel and Russia needs around \$50 a barrel oil to cover their budget requirements (even though their cost of production is markedly less).

Both countries have good currency reserves, but Russia appears to be a little more resilient. <https://blogs.platts.com/2020/03/16/oil-price-war-saudi-arabia-doomed/>



- » Both have financial war chests in place, but Crown Prince MBS may need more money faster. From Reuters:
 - The world's top two oil exporters each have war chests of around \$500 billion to weather economic shocks and are making bullish noises about their stamina as they square up.
 - Moscow said it could withstand oil prices of \$25-\$30 per barrel for 6-10 years. Riyadh, meanwhile, can afford oil at \$30 a barrel, but would have to sell more crude to soften the hit to its revenue, according to sources familiar with the matter.

<https://www.reuters.com/article/us-opeac-oil-policies/russia-vs-saudi-how-much-pain-can-they-take-in-oil-price-war-idUSKBN20W21S>

"If the shale industry did not exist, I don't think the American people realize how much we'd be held hostage by Russia and Saudi Arabia. Oil prices would be through the roof. They would control domestic policy like they did in the 1970s. You know, we really need the American shale industry, whether it's in the current form or whether it has to go through a restructuring. It's an important, vital national security asset." –Kevin Freeman

5. It's not just foreign threats, there are US Domestic Threats Against our Energy Independence.

A. Political Threats

Do the leading Democratic candidates want to see us as subservient to Russia and Saudi Arabia?

The last democrat presidential debate seemed to take the Putin playbook to ban America's Fracking industry.

Joe Biden and Bernie Sanders have said "No Fracking." This is from the Democratic debates where Biden makes it very clear where he stands on energy production.

"No more subsidies for the fossil fuel industry. No more drilling on federal lands, no more drilling, including offshore. No ability for the oil industry to continue to drill. Period. Ends number one." –Joe Biden

What happens if a President Biden is elected and he completely bans fracking?

- We would be at the whim of political thugs in Russia, Iran, or Saudi Arabia.
- America would have a lot less control of our own recovery.
- The US Economic recovery would take much longer.
- We would be completely dependent on these countries for oil prices and that would run up inflation.
- The US would be at the whim of geopolitical pressures around the world.

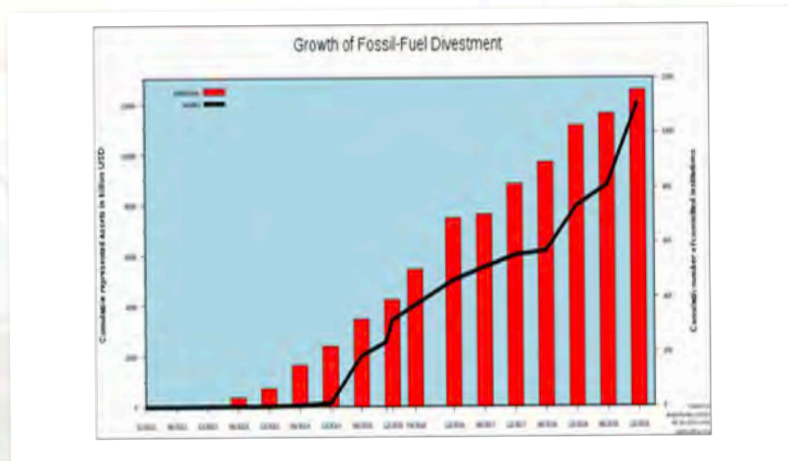
B. Investment Market Threats

US Environmental Social Governance (ESG) investment fund threats against Energy: ([See Episode 80, ESG the \\$40 Trillion Dollar Monster](#))

There has been a significant growth of fossil-fuel divestment through ESG funds. ESG stands for Environmental, Social Justice, and Governance. These leftist/progressive funds are largely pension plans and public funds working against US Energy Independence.

- ESG is a serious issue and represented \$40 trillion of wealth at start of 2020.
- These funds are purposely divesting from fossil fuel investments. \$12 trillion was divested in recent years against energy production!
- ESG Fund managers have stated they are willing to work against investor returns and invest in the values they believe are most important.

To counter these efforts, America needs investment alternatives that focus on Economic **Liberty**, National **Security**, and **Values (LSV)** that strengthen Western Civilization.



When people overreact in the public markets, opportunities open in the private wealth sector to come in behind it and help. Ask your financial advisor if energy investments make sense for your portfolio.

Why you should care?

- Our energy structure strengthens America, and this is an economic war on America.
- It's part of an economic war being used to influence the presidential election.
- America could lose its energy independence, putting us dependent on our adversaries.
- If we return to dependence on foreign oil, it could destroy our balance of payments, ship dollars overseas, and threaten our global leadership.
- The wrong decisions could lead to a significant run up in oil prices driving inflation.
- A loss of energy independence would jeopardize America's economic recovery.
 - **GOOD NEWS: Our economy is more than oil and gas. Some industries will benefit and adjust.**
- The Chinese coronavirus pandemic will end. Economies should recover, meaning demand will rebound, and understanding energy as an investment is something you may want to consider.
- Americans have a choice politically and with their investments. It is important we work together and are educated on the topic to support US energy independence.



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In the Economic War Room®, we encourage Americans to be the “small ships that make the difference.” You cannot solely rely on the government or the president to solve America’s problems. You have to make a difference. It is up to you to help take our country back and create a voice for economic liberty. In this case, being a “small ship” may include helping your neighbor in a virus scare by showing compassion or sharing helpful information. Together, we can beat this virus and keep America strong.

Action Steps:

Americans have a choice politically. And hopefully they’ll choose energy independence and that direction of liberty. We also have a choice with our investments. Hopefully we’ll look to invest in our energy growth in future as opposed to divesting those things.

1. Ask your financial advisor if investments in energy might be right for your portfolio.
2. See our other Energy Economic Battle Plans™ to learn more about this topic:
[Energy Part 1](#) [Energy Part 2](#)
3. On the political side, encourage your representatives to stand against the foreign and political threats. Vote for energy independence.
4. Russia and Saudi Arabia need to cooperate or potentially face tariffs.
5. Green fuels may not be economical with such low oil prices. Look for opportunities to benefit from the market today and other energy opportunities as technology improves.
6. Learn more about the [NSIC](#) and how you can weaponize your money towards your values, innovation and new technologies.
7. Send this battle plan to friends and ask them to sign up for our weekly Economic Battle Plan™ updates (<https://www.economicwarroom.com>). Be sure to catch the data and footnotes below for more documentation. We want you to have access to key information to make intelligent decisions.



ECONOMIC BATTLE PLAN™

OIL WARS WITH TROY ANDREWS **3.85**

CLEARED FOR RELEASE 04/30/2020 (ECONOMIC BATTLE PLAN™ POINTS: 87)

We need more Economic Patriots on the team! Consider what you can do now to help strengthen America or even help someone in need. Keep in touch with your congressional representatives. Choose from the list or set your own goals:

- Get others to sign up on our website (EconomicWarRoom.com) and review our free weekly updates and Economic Battle Plans™. Each of these will address critical solutions to the threats highlighted in this briefing.
- Subscribe to BlazeTV and please use our code (**ECON**) from that link for a discount and FREE trial.
- Follow, like, comment, and share on FB and Twitter. Look for short video segments on FB and make sure those are shared. (We recognize these tools may be compromised at times, but if they are not filtered, they are the major platforms available to reach out to the public. (Alternatives social platforms above are under EWR consideration)
- Check out XOTV.me, a new free speech video platform Economic War Room is proud to partner with. It is free, but consider making a donation to help with Economic War Room's research and production.
- You are welcome to share this battle plan and our short video segments on FB or YouTube with friends. We set up the Economic War Room™ to be your resource for information, preparation, and mobilization.
- Do this now! Have a financial action plan based on multiple geopolitical scenarios developed now. Advanced preparation is key. Trying to figure what to do when an economic event happens is usually too late.
- Talk with your financial advisor as it relates to your savings/investments. Ensure your advisor understand the potential impact economic/geo-political scenarios could have on your portfolio. [LOOK FOR ECONOMIC WAR ROOM'S ADVISOR AND INVESTOR ONLINE TRAINING COURSES LAUNCHING SOON.](#)



Shareable Quote:

“No more subsidies for the fossil fuel industry. No more drilling on federal lands, no more drilling, including offshore. No ability for the oil industry to continue to drill. Period.”

—Joe Biden - Former Vice President & Presidential Candidate of the Democrat Party

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The EWR Collection Deck – From Kevin Freeman

(List of resources and external links for more information)

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[Demand Collapse and Negative Oil Prices](#)

[How Fracking Saved America](#)

[Economic Threat to Frackers and Shale](#)

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[Economic Warfare and Oil](#)

[Political Threats to Fracking](#)

[ESG/Investment Threat to Fracking](#)

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[] - Must Read/Watch

Where to Access Economic War Room

On BlazeTV <https://get.blazetv.com/economic-war-room/>

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Our Twitter page <https://twitter.com/economicwarroom>

Our YouTube page <https://www.youtube.com/economicwarroomwithkevinfreeman>

Our XOTV Channel <https://xotv.me/channels/233-economic-war-room>

Link to all Battle Plans <https://www.economicwarroom.com/battleplans>



About Troy Andrews and Paradigm Midstream

[] Paradigm Midstream Team <https://paradigm-midstream.com/our-team>

Paradigm Midstream Services to build new crude gathering system

<http://northamericanshalemagazine.com/articles/1494/paradigm-midstream-services-to-build-new-crude-gathering-system>

Paradigm Energy Partners, LLC Executes On Contract With Anchor Producer Initiating The Build-Out Of A Crude Oil Gathering System In Northern McKenzie County, ND

<https://www.prnewswire.com/news-releases/paradigm-energy-partners-llc-executes-on-contract-with-anchor-producer-initiating-the-build-out-of-a-crude-oil-gathering-system-in-northern-mckenzie-county-nd-252453211.html>

Phillips 66, Paradigm Energy form Bakken midstream logistics JVs

<http://www.gasprocessingnews.com/news/phillips-66.-paradigm-energy-form-bakken-midstream-logistics-jvs.aspx>

EY Announces Finalists for the Entrepreneur Of The Year® 2019 Award in the Southwest

https://www.ey.com/en_us/news/2019/04/ey-announces-finalists-for-the-entrepreneur-of-the-year-2019-award-in-the-southwest

D Magazine – EY Announces 2019 Entrepreneur Of The Year Finalists

<https://www.dmagazine.com/business-economy/2019/04/ey-announces-2019-entrepreneur-of-the-year-finalists/>

Oil Price Swings from \$150 to Below Zero

Oil Plunges Most Since 1991 After Producers Embark On Price War

<https://www.farmag.com/news/oil-plunges-most-since-1991-after-producers-embark-on-price-war-54532.html>

[] SoCal Drivers May Soon Pay Upwards Of \$4 Per Gallon Of Gas Following Saudi Refinery Attack

<https://losangeles.cbslocal.com/2019/09/25/gas-saudi-refinery-attack/>

Oil jumps to a 4-year high after OPEC denies Trump and fails to raise output

<https://www.cnbc.com/2018/09/24/oil-markets-us-crude-inventories-looming-us-sanctions-on-iran-in-focus.html>

[] Why Oil Could Top \$100 a Barrel

<https://www.barrons.com/articles/why-oil-could-top-100-a-barrel-1532027982>

Oil hits record above \$147

<https://www.reuters.com/article/us-markets-oil/oil-hits-record-above-147-idUST14048520080711>

Prices could surge past 2008 highs if new reserves not found

<https://www.bloombergquint.com/business/2018/07/06/oil-spike-above-150-feared-as-investors-demand-cash-over-growth>

Can Oil be Manipulated?

[1] And They Said Markets Couldn't be Manipulated

<https://globeconomicwarfare.com/2013/11/and-they-said-markets-couldnt-be-manipulated/>

[1] Economic War Goes Mainstream—Oil's Price Drop is Seen as Proof

<https://globeconomicwarfare.com/2014/12/economic-war-goes-mainstream-oils-price-drop-is-seen-as-proof/>

[1] Proof of Market Manipulation

<https://globeconomicwarfare.com/2011/12/proof-of-market-manipulation/>

[1] There's More Smoke About Barclays, Now It's Tied to Phase One

<https://globeconomicwarfare.com/2012/07/theres-more-smoke-about-barclays-now-its-tied-to-phase-one/>

Speculation In Crude Oil Adds \$23.39 To The Price Per Barrel

<https://www.forbes.com/sites/robertlenzner/2012/02/27/speculation-in-crude-oil-adds-23-39-to-the-price-per-barrel/#79a8f9bee72f>

Demand Collapse and Negative Oil Prices

Visualizing How Oil Prices Went Sub-Zero: Explaining The COVID-19 Oil Crash

<https://www.zerohedge.com/energy/visualizing-how-oil-prices-went-sub-zero-explaining-covid-19-oil-crash>

[1] Analyst Who First Predicted Negative Oil Prices Sees Oil Hitting Minus \$100

<https://www.zerohedge.com/markets/analyst-who-first-predicted-negative-oil-prices-sees-oil-hitting-negative-100>

Oil's Meltdown Is Spreading Into The Future With June Below \$12

<https://www.fa-mag.com/news/oil-s-meltdown-is-spreading-into-the-future-with-june-below-12-55322.html>

American crude oil is worth less than nothing

<https://www.economist.com/graphic-detail/2020/04/20/american-crude-oil-is-worth-less-than-nothing>

[1] BREAKING: Oil prices drop below \$0 for the first time in history

<https://www.theblaze.com/news/oil-prices-drop-below-0-for-the-first-time-in-history>

Some oil producers have a secret weapon in hedging

<https://www.wsj.com/articles/some-oil-producers-have-secret-weapon-in-hedging-11587720601>

How Fracking Saved America

The U.S. Just Became a Net Oil Exporter for the First Time in 75 Years

<https://www.bloomberg.com/news/articles/2018-12-06/u-s-becomes-a-net-oil-exporter-for-the-first-time-in-75-years>

US Has First Full Month as Net Oil Exporter for First Time in 70 Years

https://theepochtimes.com/us-becomes-net-oil-exporter-for-first-time-in-70-years_3161744.html?

'No Blood For Oil!': How Fracking Can Lead To America's Independence From Oil-Rich Countries

https://www.youtube.com/watch?v=3ejRK_vtpZg&feature=youtu.be&utm

The Crackers and Frackers Could Hold the Keys to 2020

<https://townhall.com/columnists/salenazito/2019/09/17/the-crackers-and-frackers-could-hold-the-keys-to-2020-n2553203>

Dan Yergin: Strong US output eases panic over Saudi oil strikes <https://www.cnbc.com/2019/09/16/dan-yergin-strong-us-output-eases-panic-over-saudi-oil-strikes.html>

[] Report: Oil Output On Federal Lands Hits Record During Trump's Second Year

<https://dailycaller.com/2018/10/28/oil-output-federal-lands-record-ny-times/>

North Dakota 'just won the geology lottery.' Oil exec estimates the Bakken reserves hold 30 to 40 billion barrels of recoverable oil

<http://www.inforum.com/business/energy-and-mining/4503653-north-dakota-just-won-geology-lottery-oil-exec-estimates-bakken>

The shale revolution is a uniquely American story

<https://www.washingtonexaminer.com/opinion/the-natural-gas-revolution-is-a-uniquely-american-story>

[] Energy Secretary Rick Perry: 'True energy independence is finally within our grasp'

<https://www.cnbc.com/2018/07/29/energy-secretary-perry-true-energy-independence-is-finally-within-ou.html>

Economic Threat to Frackers and Shale

The pandemic effect on the oil industry

<https://www.alicetx.com/news/20200407/pandemic-effect-on-oil-industry>

An unprecedented plunge in oil demand will turn the industry upside down

<https://www.economist.com/briefing/2020/04/08/an-unprecedented-plunge-in-oil-demand-will-turn-the-industry-upside-down>

Oil demand could decline by 20 million barrels a day in April, says oil expert Dan Yergin

<https://www.cnbc.com/2020/03/30/dan-yergin-aprils-oil-demand-may-plunge-by-20-million-barrels-a-day.html>

[] US Shale Fights for Survival Amid Growing Pandemic, Oil Price War

https://www.theepochtimes.com/us-shale-fights-for-survival-amid-growing-pandemic-and-oil-price-war_3285847.html

We Must Not Let The Shale Industry Go Bankrupt

<https://www.forbes.com/sites/rrapier/2020/03/20/we-must-not-let-the-shale-industry-go-bankrupt/#4d6c68cb5501>

Oil prices turned negative. Hundreds of US oil companies could go bankrupt

<https://www.cnn.com/2020/04/20/business/oil-price-crash-bankruptcy/index.html>

Shale Giant Stops Most Drilling As U.S. Oil Rig Wipeout Worsens

<https://www.investors.com/news/oil-prices-shale-giant-stops-most-drilling-rival-files-bankruptcy-plan/>

[] U.S. shale company Whiting becomes first major bankruptcy of oil-price crash

<https://www.reuters.com/article/us-whiting-petrol-bankruptcy/us-shale-company-whiting-becomes-first-major-bankruptcy-of-oil-price-crash-idUSKBN21J5KS>

The Need for Storage and Other Solutions

[] Too much oil? Texas boom outpaces supply, transport networks

<https://finance.yahoo.com/news/too-much-oil-texas-boom-outpaces-supply-transport-112101928-finance.html>

Donald Trump: Fill National Petroleum Reserves with Very Cheap Oil

<https://www.breitbart.com/politics/2020/04/20/donald-trump-fill-national-petroleum-reserves-with-very-cheap-oil/>

U.S. Weighs Paying Drillers to Leave Oil in Ground Amid Glut

<https://www.bloomberg.com/news/articles/2020-04-15/u-s-weighs-paying-drillers-to-leave-oil-in-the-ground-amid-glut>

A historic OPEC+ deal to curb oil output faces many obstacles

<https://www.economist.com/finance-and-economics/2020/04/13/a-historic-opec-deal-to-curb-oil-output-faces-many-obstacles>

[] Senator Ted Cruz: The best way to protect America's energy producers is to re-open the economy

<https://www.dallasnews.com/opinion/commentary/2020/04/19/the-best-way-to-protect-americas-energy-producers-is-to-re-open-the-economy/>

Trump's Oil Deal: The Inside Story of How a Price War Ended

<https://finance.yahoo.com/news/trump-oil-deal-inside-story-120318991.html>

Republicans tell Saudi crown prince to pump less oil or risk US response

<https://www.dailysabah.com/business/energy/republicans-tell-saudi-crown-prince-to-pump-less-oil-or-risk-us-response>

Trump Forced by Oil War Into Unthinkable Push for Higher Prices

<https://www.msn.com/en-us/news/politics/trump-forced-by-oil-war-into-unthinkable-push-for-higher-prices/ar-BB12jjpg>

Sen. Cruz Meets with President to Support Millions of Energy Sector Jobs Amid Coronavirus Crisis

<https://texasinsider.org/articles/sen-cruz-meets-with-president-to-support-millions-of-energy-sector-jobs-amid-coronavirus-crisis>



COLUMN: Not another drop of OPEC oil, ever

<https://www.pipelinenews.ca/opinion/columnists/column-not-another-drop-of-opec-oil-ever-1.24106638>

Let Putin and MBS Both Lose

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