

# Green Realpolitik: Recasting Europe's Climate and Energy Diplomacy

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## I Introduction

As the world looks ahead to COP30 in Belém – ten years after the Paris Agreement – the strategic landscape could hardly be more different from that of 2015. What was then a world of shared rules and multilateral cooperation has given way to rivalry, fragmentation and power politics.

Climate and energy, long treated as technical domains of cooperation, are now inseparable from the geopolitics of war and strategic competition. Energy, minerals and clean technology sit at the heart of global power.

Three moments in early 2025 bring this shift into sharp relief. In February, the United States and Russia held talks in Riyadh: the world's three largest fossil fuel producers debated the future of European security in a room without the Ukrainians or the Europeans. Weeks later, Ukraine – under siege and running out of options – signed a minerals agreement with Washington. No security guarantees were offered in exchange, and the deal effectively sidelined an earlier EU–Ukraine minerals partnership signed in 2021.

Then, in April, China responded to escalating trade tensions with the United States by restricting exports of key rare earth elements and permanent magnets – critical for clean technologies and defence industries alike.<sup>1</sup> Although primarily aimed at the US, the move reverberated through European industrial supply chains and laid bare the EU's dependence on Chinese inputs.<sup>2</sup> Far from treating the green transition as a shared challenge, Beijing is using it as a lever of industrial and geopolitical power.

In all three cases, Europe was not just absent from discussions, it was bypassed – a spectator rather than an actor, even in matters vital to its own future.

Meanwhile, the 2019 European Green Deal, once a flagship of unity and ambition, has run into mounting political headwinds, both at home and abroad. Internally, industrial competitiveness, energy affordability and strategic autonomy have surged to the top of the policy agenda. What was once a consensus around decarbonization is now tempered by economic anxiety, electoral shifts and the pressures for security and control.

Externally, key EU sustainability measures, such as due diligence rules, the deforestation regulation and the carbon-border adjustment mechanism (CBAM), have created unease among partners. The concern is not always with their goals, but with how those policies were introduced: often with little external consultation or regard for broader consequences. Take the EU Deforestation Regulation and its benchmarking mechanism: the political fallout from classifying entire countries as high, standard or low risk has been significant. The onerous compliance requirements placed a burden on all categories, including low-risk countries, with little regard for the costs or constraints faced by third-country industries.

Against this backdrop, the European Commission is developing a new Global Climate and Energy Vision. Announced in President von der Leyen's political guidelines and jointly developed by the directorates-general for climate and for energy (DG CLIMA and DG ENER), the Vision will be released ahead of COP30. Although timed to shape the EU's posture at a pivotal international summit, its scope should be more far-reaching. It offers a crucial opportunity to redefine Europe's global approach.

The importance of this exercise cannot be overstated. Climate and energy diplomacy have become the primary lens through which partners from Africa to Southeast Asia experience and judge the EU. This is especially true in the run-up to COP30, where the EU's visibility will be high and so will expectations. Missteps carry reputational costs well beyond the climate sphere.

This report argues that the Commission's Vision must be more than just a sectoral initiative. It should be a strategic exercise that cuts across policy silos and links foreign policy, industrial competitiveness, green ambition and security through the prism of climate and energy. As the first major external strategy of the second Von der Leyen Commission, it will give direction to how Europe engages with the rest of the world at COP30 and over the next decade. At stake is more than climate leadership, it is Europe's ability to shape global outcomes on its own terms. This requires a *Green Realpolitik*: the capacity to align values with interests and to turn Europe's assets – its market, finance, credibility and partnerships – into real influence.<sup>3</sup>

## II Strategic dilemmas in climate and energy diplomacy

Much of Europe's climate and energy diplomacy still runs on legacy assumptions and ideals. The EU continues to speak the language of climate ambition, partnership and shared rules, even as the world tilts towards power politics, deal-making and leverage.

Beneath the polished surface of strategy documents lies a set of unresolved tensions. These are not new, but they have become more acute as the global context has hardened. Green ambition is now coming up against an economic backlash, as climate policies bite. Free trade and open markets are challenged by the need for economic resilience. The EU has sought to square these circles with elegant language – 'open strategic autonomy', 'just transition', 'Team Europe' – but too often, those phrases mask rather than resolve the trade-offs.

These tensions are not abstract. They shape the EU's climate and energy diplomacy every day. What follows is an attempt to sharpen awareness of the strategic choices they present. If the EU is to remain influential in a more contested world, it must confront these dilemmas head on and decide where it is willing to redirect its course, at what cost, and for which gain.

### **Ambition vs. backlash**

The EU has cast itself as the global standard-bearer of climate ambition. It was the first major economic bloc to legislate climate neutrality and has remained a consistent supporter of the global climate regime. When the United States withdrew from the Paris Agreement (for the second time) on the first day of the new Trump administration, the EU responded within days by launching the Global Energy Transitions Forum to rally global partners and preserve momentum.

The case for ambitious climate policy is strong. Even amid all the geopolitical shocks, climate change arguably remains one of the defining disruptors of our era. However, the political mood on climate has clearly shifted since the heyday of the Youth Strike for Climate protests in 2018-19.

Across Europe, the converging pressures of rising energy costs, regulatory overload and slowing economic growth have triggered the pushback.

Businesses warn of competitiveness gaps and potential carbon leakage, the threat of firms relocating activity to countries with laxer compliance regimes or lower energy costs. Citizens, already strained by inflation, are sceptical of policies that raise household costs. Farmers have taken to the streets in protest. Governments have become increasingly hesitant to levy any new financial burdens on voters. In the latest sign of the times, President von der Leyen recently moved to withdraw legislation aimed at countering the 'greenwashing' of products or production processes, much to the dismay of her green and socialist coalition partners within the Commission and EU Parliament. The 'greenlash' is in full swing.

Nowhere are these tensions more acute than in Europe's industrial core. The risk of deindustrialization is a reality across regions of Germany, Central Europe and Scandinavia.<sup>4</sup> From steel to chemicals to automotive, sectors essential to both the economy and the green transition are struggling to stay afloat. The new Clean Industrial Deal is a rescue operation for Europe's industrial heartlands that challenges old dogmas on fiscal prudence, free trade and climate purism.

Policymakers face an unenviable trade-off: accelerate the transition and risk social and industrial fracture; slow it down and risk losing the credibility and momentum needed to shape the global transition and reap its economic and strategic benefits.

### **Norms vs. deals**

Europe has long championed the globalization of standards. Through instruments like CBAM, the Deforestation Regulation and due diligence rules, the EU has sought to project its values by linking market access to environmental and social safeguards. But this model is facing mounting external resistance. Many countries in Africa, Asia and Latin America no longer see these rules as shared solutions, but rather as burdens imposed from abroad or, as Brazilian president Lula memorably put it, as 'green neocolonialism'.<sup>5</sup>

This rejection reflects a deeper geopolitical shift. The Global South is asserting greater agency, demanding development on its own terms and often favouring transactional partnerships over normative alignment. Meanwhile, Europe's competitors are stepping in with speed and pragmatism. China

builds infrastructure abroad in months. The United States, when engaged, can rapidly mobilize financing, often through a mix of commercial loans and security guarantees. Russia's Rosatom offers turnkey nuclear power plants. By contrast, Europe's values-driven model can be slow, fragmented and bound by conditions.

The risk for the EU is that its offer will fail to resonate. In a world where partners make choices based on delivery, not declarations, how can Europe make its conditions part of a package countries actually want to sign up to? Can it still lead through norms if they are not backed by capital, co-ownership and speed of implementation? These are the strategic questions Europe must urgently confront.

### **Openness vs. resilience**

The EU traditionally champions open trade. But the green transition depends on supply chains – raw materials, technologies and manufacturing – that are increasingly subject to geopolitical competition. As other actors adopt industrial policy and state-backed investment, Europe is under pressure to respond more defensively, even at the cost of straining WTO norms or partner relations.

This shift has left Europe exposed. From batteries to solar modules to rare earths, the EU is heavily dependent on external suppliers – often strategic rivals such as China. In response, Europe is turning to defensive tools: tightening foreign subsidy rules, reviewing foreign investment, launching anti-coercion measures. But each step towards increased resilience raises a question: how far can the EU go without compromising its own identity as a champion of open trade?

This is not just an economic debate. It is a strategic dilemma. Europe cannot afford to be naïve, but neither can it afford to become isolationist. Maintaining trade and investment flows is critical to the green transition both in Europe and globally. The challenge is to defend Europe's industrial base without sliding into protectionism, to build security without closing off competition. What tools, and what trade-offs, is Europe willing to accept in pursuit of green resilience?



## Unity vs. fragmentation

The Union aspires to act as one. But on climate and energy diplomacy, unity is rhetorical rather than practised. Member states pursue their own strategic ties, financial institutions operate with limited coordination and Commission services often run on parallel tracks. 'Team Europe', for all its promise of cooperation, is still more a slogan than a reality.

This institutional fragmentation comes at a cost. Partners are left confused by multiple interlocutors. Europe's leverage is diluted as financial offers, regulatory constraints and diplomatic engagement fail to reinforce one another. And even the best offers risk under-delivering when they are dispersed across actors with different timelines, mandates and priorities.

The question is not whether Europe needs unity, as it clearly does. The question is how to make it operational. Can the EU build the decision-making machinery that will enable it to act in sync by pooling instruments, speaking clearly and delivering fast enough to matter in a more competitive world?

## Reach vs. impact

The EU has signed dozens of climate and energy agreements. Since 2021, more than thirty new partnerships have been concluded, alongside numerous Global Gateway projects related to energy and climate, spanning more than eighty countries.<sup>6</sup> The EU's ever-expanding web of agreements takes many forms, encompassing raw materials partnerships with Canada and Namibia, green hydrogen agreements with Egypt and Chile, and wide-ranging Green Alliances with Japan and Norway. But reach has come at the expense of depth. Many partnerships remain thinly resourced, loosely coordinated or poorly aligned with strategic objectives. The result is a widening web of initiatives and memorandums of understanding without follow-up or delivery. Member state diplomacy often runs in parallel, adding further complexity. Namibia, for instance, has signed four separate green hydrogen agreements: one with the Commission and three with individual EU countries.

With limited time, money and political capital, the EU can no longer afford to be everywhere. Strategic focus is needed to consolidate where impact is possible and to engage selectively where stakes are high. The challenge is to strike the right balance. How can Europe deepen ties with trusted allies while

engaging pragmatically with pivotal, if imperfect, partners? How can it make its global presence a multiplier of influence, not a symbol of overstretch?

### III From moral leadership to strategic leverage: Europe's assets

For much of the past decade, Europe acted as the conscience of global climate governance and the energy transition. That role is becoming untenable. In a world that rewards leverage over leadership, the EU must learn to influence rather than to evangelize. It must recognize that power resides in credibility, in market access, in finance and, critically, in partnership.

#### Credibility

Europe accounts for just six per cent of global greenhouse gas emissions; a share that continues to shrink. This reflects both the success and the limits of European climate policy. Success, in that Europe's economy is steadily decarbonizing. Limits, because other major emitters are not following suit. Despite a proliferation of net-zero pledges, the 'Brussels effect' has not taken hold when it comes to climate ambition.

This calls for a shift in emphasis. Deep decarbonization at home remains essential, but for different reasons, not because it will save the planet, but because it underpins Europe's credibility abroad. The EU cannot expect to influence others if it is not seen to lead. However, internal debates over whether to cut emissions by ninety or ninety-five per cent by 2040 risk missing the larger point.<sup>7</sup> In a world where Europe's share of emissions keeps declining, the real climate impact increasingly lies in what the EU can help unlock beyond its borders.

In today's world, influence comes less from moral suasion and more from forging alliances, co-financing transitions and backing projects that align with mutual interests. The EU must engage with partners on their priorities, not just Europe's.

Here, Europe's edge is its transparent governance, regulatory quality and trustworthy institutions. In a world of erratic actors, Europe's stolidity has become an unlikely asset. But trust is not to be taken for granted. Unilateral

initiatives, such as the aforementioned deforestation regulation, may be well-intentioned, but their unilateral imposition has alienated partners.

## Market

The EU's internal market – home to over 440 million consumers and worth more than €16 trillion – remains its most powerful source of geopolitical leverage. Access to it extends Brussels' regulatory reach far beyond its borders. Instruments like CBAM link market access for carbon-intensive goods such as steel and cement to climate performance. The Methane Regulation applies similar logic to imported fossil fuels, requiring exporters to monitor, report and reduce emissions. Since the EU is the world's second-largest fossil fuel importer after China, such rules carry global weight.

This extraterritorial reach can be effective but only if it is used wisely. Trust is part of Europe's currency. When regulatory instruments are seen as fair, transparent and paired with support, they can draw others in. CBAM, for instance, has prompted structured dialogues on carbon pricing with countries including China, Turkey and several in the EU's neighbourhood. To foster additional legitimacy and reach, redirecting CBAM revenues towards international climate action, particularly in vulnerable countries, would be both symbolically powerful and geopolitically smart.

Europe's market power is considerable, but protectionist measures diminish its leverage. Europe needs a balanced stance in terms of trade; it must be robust against unfair practices and open to fair, rules-based competition. Strategic sectors must be protected through WTO-compatible tools, yet avoid sliding into protectionism. It is a tension that is not easily resolved.

China is a key test of whether the EU can combine openness with resilience. Europe cannot afford another solar 'PV moment', when Chinese subsidies wiped out its own solar panel industry. Similar risks loom across other clean-tech sectors: batteries, electric vehicles, heat pumps, electrolyzers and wind turbines. The EU must defend its industrial base with anti-subsidy tools, while closing circumvention loopholes through third countries. If Chinese firms want access to Europe's market and incentives, industrial partnerships should be conditional on technology transfer, local employment and supply-chain transparency. Manufacturing in Europe should not be reduced to final assembly with limited value added.

## Capital

Europe's third major lever is capital. The EU and its member states, together with the European Investment Bank, remain the world's largest provider of public climate finance to developing economies, providing €28.6 billion in 2023.<sup>8</sup> They are also the world's top provider of official development assistance, amounting to a total €88.7 billion in 2024.<sup>9</sup>

With USAID in retreat under Trump and China's BRI facing a backlash, Europe has an opportunity to position itself as a reliable development partner.<sup>10</sup> However, provision of capital must be faster, more visible and aligned with partner priorities. The Global Gateway was meant to deliver this shift. So far, it has not.

Funding is abundant, but strategy is lacking. The EU's financial instruments remain fragmented between Commission tools, development banks and national development finance institutions. The appetite for risk is low. Delivery is slow. Without coordination and a clear strategic framework, Europe's money will remain too thinly spread to make a difference. Influence, like capital, needs focus.

Climate finance and development aid instruments, such as concessional loans, guarantees, blended finance and targeted equity stakes, should not be seen or framed as charity. They are strategic tools for building enduring partnerships that can de-risk supply chains, stabilize regions and anchor a European presence in key regions. Support under the Global Gateway, for instance, could be made conditional on meaningful EU company participation. The EU must act not just as a regulator or norm-setter, but as a global investor and industrial partner.

## Partnership

In a world of sharp elbows and deal-making, Europe's strength lies not just in what it brings, but in how it engages. The EU may lack Washington's coercive power or Beijing's industrial scale, but it still commands something both rivals often struggle to offer, namely predictable, fair partnerships based on co-investment.

From Latin America to Southeast Asia, many countries want the same things as Europe: economic growth, cleaner energy, skilled jobs, resilient

industries as well as regional stability and peace. The EU's advantage lies in offering a cooperative model of engagement based on joint ventures, local manufacturing and mutual benefit. Europe must offer stakes in industrial value chains, not just sustainability targets. Europe's offers must be tailored accordingly to reflect partner priorities alongside EU interests.

Balanced partnerships should also serve Europe's interests by securing access to critical materials, de-risking supply chains and maintaining industrial presence. For instance, it is unrealistic for Europe to fully onshore clean-tech manufacturing and critical mineral extraction and processing. Co-investing in local processing, refining and manufacturing capabilities – particularly with countries in Africa and the broader Global South – is therefore both a strategic imperative and a development opportunity. It reduces concentration risk while supporting shared industrial growth. Many of these countries also have the resources and conditions to carry out such activities more sustainably than Europe.

This must be structured around unified country strategies that align regulation, trade, finance and industrial cooperation. Instruments like Clean Trade and Investment Partnerships (CTIPs) are designed to do that by bundling regulation, investment and strategic alignment into one coherent and credible package:

#### **Clean Trade and Investment Partnerships (CTIPs): The South Africa test case**

The EU has launched Clean Trade and Investment Partnerships (CTIPs) as a new instrument to align trade, climate and industrial cooperation. South Africa is the first test case.

What makes this a credible proving ground?

- **Strategic alignment:** South Africa combines trade access, critical raw materials and energy transition needs. A CTIP provides a vehicle to bundle these into one coherent offer.
- **Business case:** The country urgently needs investment in its electricity grid and industrial base. Recent legal changes allow private participation, for which EU firms are well positioned.
- **Value chain leverage:** South Africa wants to process more of its own

critical minerals. The EU also benefits when raw materials arrive in usable, not raw, form. This is a win-win, if co-investment can be unlocked.

- **Political readiness:** South Africa is demonstrating a strong political willingness to engage. It is one of Africa's largest economies, but 80-90% of its energy still comes from coal and it faces major grid issues.

CTIPs test the EU's ability to deliver a whole-of-institution offer – coherent, commercial and credible. If successful, the model could be replicated with other partners seeking both industrial value and energy transition support. It is a way of deepening the Union's economic partnerships beyond the free-trade agenda, as befits the current post-globalization era.

## VI Turning levers into strategy

Europe has the levers but lacks a strategy. The effectiveness of the Commission's new Global Climate and Energy Vision will depend less on what is promised than on how it is delivered. This requires strategic coherence, narrative clarity and institutional coordination.

### Coherence

A more strategic approach begins with policy coherence across internal and external policies. Internal initiatives, whether they are revisions to the Green Deal, industrial support schemes or climate targets, should be screened for their economic and environmental impact and for their geopolitical fit. Do they align with the EU's strategic interests? Do they meet partner expectations? Do they reinforce or undermine the EU's ability to compete globally?

Coherence also means breaking traditional policy silos. Climate, industrial and foreign policy are too often treated separately, each with their own goals, tools and timeframes, which weakens the EU's external posture. A whole-of-government approach is needed that brings together policy, finance and diplomacy under a shared strategic lens. The Commission's upcoming Trans-Mediterranean Energy and Clean Tech Cooperation Initiative, for instance, is not just about decarbonization; it directly or indirectly also touches on migration, security and regional stability. Such links are often missed when policy is made in isolation.

This requires upstream coordination, at the design stage not after strategies are finalized. Europe must build stronger links between Commission DGs, the EU's external action service (EEAS), member states' ministries and financial institutions, ensuring early alignment on priorities, partner selection and offers. Too often, external partners receive overlapping or even conflicting messages from different parts of the EU system. One DG might pursue a regulatory dialogue, while another discusses investment and a third negotiates trade, all without a shared narrative or clear sequencing. International partnerships often just reflect institutional silos or the travel itineraries of senior officials rather than a clear strategic rationale. Such bureaucratic happenstance confuses partners and weakens the EU's leverage. Coordination must begin with joint strategic planning. This is a broader imperative that the EU meets in many other domains where the economy and security collide, but climate and energy diplomacy would be a good place to start. The Vision should identify a limited set of external priorities that are jointly upheld by relevant Commission services, the EEAS, member states and financial institutions.

### **Narrative**

The geopolitics of energy and climate is not just about technologies, investment and supply chains, it is also a battle of narratives. While others project power through clear storylines – of renewal, sovereignty or national greatness – the EU often appears reactive, fragmented or moralizing. Ahead of COP30 in Belém, Europe needs a sharper narrative. One that resonates globally, strengthens partnerships and builds public support at home for a strong external climate and energy policy.

At the heart of that story is a simple truth: decarbonization is not a burden, it is part of Europe's modernization strategy. The transition to clean technology is already driving innovation, competitiveness and investment. Yet the EU's external messaging often lags behind this reality, still couched in terms of sacrifice and obligation.

Europe must shift its diplomatic tone. Urging others to 'do more' is neither persuasive nor productive. Climate cooperation should be framed as a shared opportunity that delivers concrete benefits: jobs, technology, public health and long-term security.

Crucially, this message should not come from the EU alone. It is more persuasive when partner countries share their own success stories. Kenya offers a compelling example. Over eighty per cent of its electricity now comes from domestic, low-carbon sources (mainly geothermal). EU support, including through Global Gateway and earlier initiatives, has contributed to this progress. Yet such achievements remain under-communicated.

To respond, the EU Commission, together with the EEAS, should revamp their approach to communications on climate and energy diplomacy. It should focus on region-specific storytelling, elevate partner voices and build capacity to counter disinformation by monitoring foreign information manipulation and interference. Strategic communication must be treated as an operational tool of diplomacy.

Finally, a consistent narrative must be integrated across policy domains. Climate and energy diplomacy should be embedded in Europe's broader foreign and economic outreach, from trade missions to industrial partnerships. Only by aligning story and strategy can the EU turn its narrative into a competitive asset.

### **Institutions**

The EU's ability to act abroad depends on alignment at home. Yet the promise of 'Team Europe' – unity across EU institutions, member states and financial actors – remains only partially fulfilled. The EU's external credibility is undermined by its own fragmented initiatives, slow coordination and institutional competition.

In a world increasingly shaped by blocs and alliances, this disjointed delivery weakens negotiating power, sowing confusion among partners and limiting the impact of the EU's most ambitious instruments. This has to change, and Europe must strengthen its ability to deliver on the ground. To achieve this means building integrated country teams where needed that bring together Commission services, the EIB, member states and national development banks to act under a shared mandate. These teams should be equipped to design single work plans, coordinate instruments and engage partners through a unified platform.



In practical terms, the EU could establish more joint task forces for priority countries or initiatives, where staff from different institutions work together (ideally located in the same place) to design and implement a single work plan. For instance, a 'Team Europe Clean Energy Task Force' for a specific region could merge the efforts of DG ENER, DG INTPA, the EIB and interested member states. This would reduce overlap and present partners with one interlocutor.

Improving delivery also requires institutional coordination. Global Gateway was conceived to provide that platform, but its early implementation has exposed persistent bottlenecks: long approval timelines, dispersed financing channels and a lack of empowered field-level actors. These are not just procedural issues, they are strategic weaknesses.

To close this gap, the Vision should include a proposal for a light, standing interservice platform on climate and energy diplomacy, jointly anchored in the Commission and the EEAS. Its aim would be to strengthen strategy, coordination and delivery across the external interface, without duplicating existing structures. Its work could span areas such as strategic communication, partner engagement or the alignment of financial tools. Above all, it would provide a shared space to link foreign, climate and industrial policy more effectively.

## **V Conclusion – The stakes at COP30 and beyond**

COP30 in Belém is more than a diplomatic milestone. It is a geopolitical test and a strategic opportunity. The EU's new Global Climate and Energy Vision should not just define policy direction for the years ahead, it should signal how Europe intends to engage with a world in transition. At a moment when multilateralism is under strain and climate ambition is contested, the EU must show that it can adapt without retreating.

The message in this report is that the EU must not abandon its values and green ambition, but it must express them in ways that are realistic and compelling. That means shifting from advocacy to alignment; from moral posturing to strategic positioning; from lecturing partners to collaborating with them.

It means embracing a *Green Realpolitik* that:

- Reaffirms commitment to the climate transition. The Green Deal is not a phase; it is the foundation of Europe's future economy and security;
- Redefines leverage using the EU's assets – its rules, market, finance and partnerships – to shape outcomes and build alliances that deliver tangible benefits and embed Europe's competitiveness;
- Reorganizes delivery by building the institutional machinery needed for Europe to act with a unified purpose: agile in implementation and coherent in message.

The Vision launched in 2025 has the potential to serve as the cornerstone of a broader repositioning of Europe in the world. It can demonstrate that Europe can lead with clarity, competence and credibility. However, it requires courage to address the fundamental dilemmas delineated in this report. Europe needs to make choices.

## Notes

1. Lewis Jackson, Amy Lv, Eric Onstad & Ernest Scheyder, 'China hits back at US tariffs with export controls on key rare earths', *Reuters* (4 April 2025).
2. CLEPA, 'Urgent Action Needed as China's Export Restrictions on Rare Earths Disrupt European Automotive Supply Chains', press release, Brussels, 4 June 2025, CLEPA
3. This report draws on a closed-door dialogue with senior EU officials and supporting consultations held in Spring 2025. A short description and some photos of the event, which was held under the Chatham House Rule, are available at: [big-europe.eu/2025-04-03-big-hosts-safe-space-strategy-session-on-the-future-of-eu-energy-and-climate-diplomacy](https://big-europe.eu/2025-04-03-big-hosts-safe-space-strategy-session-on-the-future-of-eu-energy-and-climate-diplomacy). We are grateful to the European Climate Foundation for supporting this work. The aim of this report is not to draft text for the Vision but to offer strategic guidance on the choices ahead, building on BIG's earlier work in this area, notably: Thijs Van de Graaf, Hans Kribbe & Luuk van Middelaar. Energy diplomacy: Europe's new strategic mission, BIG003, (2024) Brussels Institute for Geopolitics. Available at: [big-europe.eu/publications/big003-energy-diplomacy](https://big-europe.eu/publications/big003-energy-diplomacy). The author is grateful to Luuk van Middelaar and Hans Kribbe for their valuable comments on earlier drafts.
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9. Organisation for Economic Cooperation and Development, *Preliminary Official Development Assistance Levels in 2024*, DCD(2025)6, 16 April 2025, OECD.
10. Two countries withdrew from the BRI: Italy in 2023 and Panama in 2025. Specific circumstances aside, these exits reflect broader international unease over the transparency, sustainability and geopolitical implications of BRI involvement.

## Image credits

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### About the Brussels Institute for Geopolitics

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