

From Crisis to Strategy: *Elevating Climate in EU Foreign Policy*

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The global climate and energy transition is widely recognised as a security, economic and geopolitical issue. Nevertheless, climate is not yet consistently integrated as a core consideration in EU foreign policy. The transition to clean energy systems can reduce fossil fuel dependencies and mitigate the increasing risk of climate shocks, but it is also reshaping Europe's relationships with partners and competitors, creating new dependencies and sources of geopolitical leverage and competition around critical minerals and clean technologies. At the same time, climate impacts at home and abroad are becoming systemic risks to growth and stability. In the interest of its autonomy, security and global standing, the EU should make climate and the clean transition a more deliberate part of its foreign policy and approach these questions with greater strategic foresight, instead of reacting as crisis follows crisis.

Summary

Over the past years, the EU has confronted a succession of crises. Large-scale war has returned to Europe, transatlantic relations have become more unpredictable, the EU's global competitiveness has suffered from decades of deindustrialisation, and political polarisation, disinformation and foreign interference are complicating collective EU action precisely when greater unity is required.

The EU has recognised that a more strategic approach to foreign policy is required. However, at present its foreign policy agenda does not yet systematically reflect how central climate and the clean transition have become to many of the questions the EU faces – in the same way that its energy and industrial policy agendas now position the clean

transition as core to Europe's competitiveness. This gap represents a strategic liability that risks weakening EU security and influence in the world.

Climate and energy are increasingly shaping Europe's security environment

Energy systems and supply chains are increasingly being weaponised in conflict, as seen in the war in Ukraine and the conflict affecting the Strait of Hormuz. Aside from impacts on civilians and the economy, disruptions to fuel supply can hinder defence capabilities. These impacts are compounded by the effects of global warming; extreme heat and wildfires are intensifying with each year, imposing economic costs measured in the tens of billions of euros and posing an increasing threat to military readiness.

The global energy transition raises new security and foreign policy questions

Transitioning to clean energy systems brings benefits in the shape of reduced dependence on global fossil fuel supply chains and more resilient, distributed energy systems. However, it opens new areas of geopolitical competition, as reliance on concentrated supply chains for critical raw materials and technologies central to the transition brings its own vulnerabilities.

Additionally, the EU's ability to translate climate leadership into broader geopolitical or development goodwill is increasingly contested, particularly by China's expanding offer to countries in the Global South. Meanwhile, Europe's own multilateral rule-setting influence has weakened since the 2015 Paris Agreement.

Recommendations for the EU's foreign policy agenda

A foreign policy approach that supports the EU's ambitions for autonomy, resilience and competitiveness must now have climate at its core. A bolder agenda, grounded in the strategic and security case for climate action, would give the EU the leverage to shape the conditions of the global transition while helping ensure that it remains just amid geopolitical fragmentation and growing competition.

In this briefing we provide detailed recommendations for the EU and its Member States across five areas where climate, energy and foreign policy are connected. Our three suggested overarching priorities for action are:

1. Make climate and energy security a priority of EU foreign policy

Make climate and energy security a regular Foreign Affairs Council agenda item and build a more integrated EU external strategy across climate, energy, trade, industry and security. Stronger Commission-EEAS-Member State coordination should support clearer political alignment, more coherent external messaging and greater focus on adaptation, resilience and climate finance. The EU-UK reset offers an immediate opportunity to also align on this

agenda through deeper cooperation on energy, climate security, and resilience with the UK and other partners.

2. Make climate a core component of the EU's broader security and resilience agenda

Integrate climate and energy risks more systematically into the EU's security architecture, as well as in its defence readiness planning and its partnerships with third countries, while preparing for a world that exceeds 1.5 °C of warming. This means accounting for growing risks to defence infrastructure, operational readiness, water and food security, political and geopolitical stability. The EU should also incorporate climate-related vulnerabilities into hybrid-threat assessments. Climate-related disasters, energy disruptions and transition pressures should also be treated as vulnerabilities that hostile actors can exploit through disinformation, cyberattacks, economic coercion and attacks on critical infrastructure, making counter-FIMI and strategic communications an integral part of the EU's climate-security posture.

3. Adapt the EU's cooperation strategy and partnership offer for a more competitive context

The EU should link climate cooperation more closely to industrial development, resilient supply chains, adaptation and security, while tailoring offers to partners' priorities. This should include deeper cooperation with India and renewed engagement with African countries. The next Global Europe Instrument should support this through more predictable finance, greater use of grants, guarantees and technical assistance, and climate-resilience screening of Global Gateway investments. A flexible *Clean Transition Compact* could bring existing trade, energy, critical-minerals and climate partnerships under a clearer umbrella, reduce duplication and make the EU's external offer more coherent, competitive and easier to implement.

Introduction: Foreign policy and climate throughout crisis and geopolitical shifts

Jean Monnet wrote in his memoirs in 1976 that Europe would be built through crises and become "the sum of the solutions" adopted in response to them.¹ The geopolitical shifts of the past few years have indeed pushed the EU and its Member States to confront uncomfortable strategic realities and to recognise that a more strategic and autonomous European agenda has been long overdue.²

¹ Institut Jean Monnet, <https://institutjeanmonnet.eu/memoires-jean-monnet/>

² Delegation of the European Union to the Russian Federation, 15 March 2022, [Versailles declaration: strengthening European sovereignty and reducing strategic dependencies](#)

The ongoing crises of the past decade have made increasingly visible that climate, energy and the clean transition must be an integral part of the EU's wider foreign policy and geopolitical agenda. Russia's war against Ukraine and disruptions affecting the Strait of Hormuz have again shown how energy dependencies and transit routes can be weaponised and become sources of strategic vulnerability. The clean transition reduces these exposures but at the same time creates new ones, for as long as Europe remains dependent on concentrated clean technology and critical mineral supply chains. Climate impacts add another layer of risk. Europe is the world's fastest-warming continent, and its economy and security are vulnerable to the shocks brought on by the changing climate. According to a recent report, extreme heat alone is estimated to reduce EU GDP by around 1% in 2026 – roughly €180 billion – while the summer's heatwave wiped an estimated €2 billion from European grain production.³ These impacts affect productivity, food security, energy systems, critical infrastructure, public finances and the stability of supply chains in the EU's neighbourhood.

The EU has begun adapting to this new reality with initiatives such as REPowerEU, the Clean Industrial Deal, the Net-Zero Industry Act, the Critical Raw Materials Act (CRMA) and the Electrification Action Plan that seek to connect decarbonisation with industrial capacity, competitiveness, security of supply and economic resilience. Together, they reflect a growing recognition that the clean transition is a core element of Europe's economic security and strategic autonomy, and that external partnerships need to strengthen European resilience while also delivering tangible economic and security benefits for partner countries. Progress has been less consistent in integrating climate risks within foreign, security and defence policy. The Commission and the EEAS have sought to strengthen the climate–security nexus and integrate climate more directly into external action. The Joint Communication on the Climate–Security Nexus⁴ links climate risks with conflict prevention and crisis response while the Global Climate and Energy Vision⁵ positions climate and energy diplomacy within Europe's broader competitiveness and geopolitical agenda. The April 2026 Foreign Affairs Council conclusions⁶ similarly called for climate–security considerations to inform relevant foreign and security policy strategies. The EU is also stepping up efforts to diversify critical-mineral and clean-technology supply chains and to build new external partnerships in the framework of its CRMA. But these initiatives remain dispersed across institutions and policy areas, while climate–security considerations are still too often confined to political statements rather than systematically embedded across foreign, security and defence policy.

The challenge for the EU now is to build on its understanding of the challenges it faces, and to more strategically manage and leverage the interdependencies between energy, climate,

³ Triodos Bank, 8 August 2026, [Hot Summer Economics](#)

⁴ European Commission and EEAS, 28 June 2023, [Joint Communication on the Climate–Security Nexus](#)

⁵ European Commission, 16 October 2025, [EU global climate and energy vision: securing Europe's competitive role in world markets and accelerating the clean transition](#)

⁶ Council of the EU, 21 April 2026, [EU energy and climate diplomacy: Council approves conclusions](#)

and economic and security risks, in support of both climate and foreign policy objectives and broader geopolitical goals. This requires:

- ▶ greater coherence across EU institutions and Member States
- ▶ a more competitive economic and partnership offer to third countries
- ▶ stronger integration of climate and energy security into the EU's security and defence architecture
- ▶ greater capacity to anticipate and communicate geopolitical and climate-related disruption
- ▶ a closer link between multilateral climate ambition and sustained implementation.

Make climate a foreign policy priority and strengthen cohesion

Climate diplomacy and the intersection of climate and foreign policy have appeared as standalone Foreign Affairs Council discussions only periodically – in 2015, 2018, 2020, 2022, 2023, 2024 and most recently in April 2026. The rest of the time, climate-related conclusions ride inside a broader foreign policy agenda and indirectly through trade and development cooperation.

But the international context is changing: the clean transition is reshaping strategic relationships and patterns of competition. Foreign policy is now exercised through the ability to shape markets, technologies and partnerships, not only through diplomacy and military power. Given that climate is deeply intertwined with the EU's core economic and security interests, treating it as a standalone area of the Foreign Affairs Council would allow the EU to connect its global climate agenda more systematically to wider foreign policy objectives, including securing clean transition supply chains and building new alliances around trade, industrial cooperation and security.

Framing climate through the lens of security and as a shared strategic concern may also help strengthen internal political cohesion on foreign policy. Lack of cohesion on issues surrounding China policy, migration pressures, transatlantic relations, NATO and conflicts in Middle East has been a major struggle that continues to dilute the EU's strategic positioning, limiting its geopolitical potential.

The EU has demonstrated its ability to cohere around security questions in its response to Russia's invasion of Ukraine. This led to rapid unity on sanctions, the rapid mobilisation for substantial military and financial assistance package for Ukraine, coalitions of the willing to provide security guarantees, and the swift decision to grant Ukraine EU candidate status. All these decisions have proven how strategic unity can translate into collective leverage and geopolitical influence. Without this response, Ukraine would have been far less able to

resist Russia's aggression, and the threat to European security would already be far more immediate.

The response to the COVID-19 pandemic followed a similar dynamic. While the initial response was characterised by fragmented national measures and competition over medical supplies, the crisis ultimately accelerated greater coordination through joint procurement, vaccine distribution efforts, recovery financing through NextGenerationEU, and the emergence of the Team Europe framework for external engagement.⁷

The experience showed that crises can initially intensify fragmentation but can also generate new mechanisms for collective action when common political objectives are established. Building this coherence requires political recognition that climate is a major and urgent national and international security issue, and should therefore be incorporated as a core foreign policy priority of the EU and across Member States. This should be accompanied by improved high-level institutional coordination, to allow existing tools and instruments to be leveraged more strategically to advance the EU's international climate agenda.

Recommendations

Make climate and energy security a standalone regular agenda item in Foreign Affairs Council meetings

- This would contribute to recognising climate change and energy transition among core foreign policy priorities of the EU and its Member States. It offers an opportunity for high-level political alignment and stronger cohesion between Member States on the strategic nature of international climate action, climate security and energy transition and the European interests involved. It would represent a major change from treating climate as a horizontal issue toward a more focused priority that requires specific action and decision making. Additional ad-hoc FAC meetings should continue to be organised in the event of specific developments requiring more urgent action.

Build a more integrated EU foreign policy approach across climate, energy, industry and trade, with high-level coordination

- The policy instruments and sectoral competences of the EU's external action on climate, energy, industrial policy and trade remain largely within the European Commission. As these areas become increasingly intertwined with the EU's geopolitical, foreign and security policy objectives, the EU needs to bring these different strands together within a more integrated foreign policy strategy.

⁷ European Commission, Overview of the Commission's response, https://commission.europa.eu/strategy-and-policy/coronavirus-response/overview-commissions-response_en

- A more integrated foreign policy approach can also be advanced through closer coordination at the highest institutional level, for example, through joint high-level communications and strategies. This would also contribute to overcoming institutional fragmentation and demonstrate externally a stronger united and unique position on climate diplomacy.

Treat climate risks as urgent priorities for the EU's foreign and security agenda

- The recurring crises in Europe and beyond due to intensifying climate impacts should serve as a wake-up call for EU Member States to unite around a common and bolder international climate security agenda, unlock climate finance, and show leadership in addressing climate-related crises through investments in adaptation and resilience as part of a stronger EU offer to vulnerable partner countries. The EU should do so in close cooperation with the UK and Canada, and seek to develop coalitions with other partners to advance the work both in multilateral forums and via targeted partnerships and cooperation mechanisms.
- Better integrating climate messaging into foreign policy and security speeches would more consistently present climate as part of Europe's economic security, sovereignty and geopolitical resilience agenda. EU institutions and Member States should therefore align their narratives across climate, trade, industrial, development and foreign policy while communicating trade-offs honestly and not presenting climate action as cost-free. Keep in mind that strategic communication cannot compensate for policies that are underfunded, inaccessible or poorly aligned with partner countries' priorities.

Use the momentum of the EU-UK reset to accelerate action on climate security

- The EU and UK are entering a new era of strategic relations, built on a joint interest in a more secure and resilient European continent. This offers an opportunity for stronger alignment on foreign policy objectives related to climate, particularly on climate security. The new Security and Defence Partnership already foresees closer EU-UK cooperation on the climate-security nexus. They can build on this framework and on the recent ministerial meeting on climate security held on the sidelines of UNGA to advance climate security internationally and jointly support the countries most vulnerable to climate change through the exchange of best practices, scientific cooperation and data sharing, the development of early warning systems, and greater investment in adaptation and resilience.

Develop competitive partnership offers built on mutual interests

Geopolitical fragmentation is generating new tensions and crises, but also incentives for new alliances and cooperation. This represents an opportunity for the EU to reset its partnership approach as a key pillar of its foreign policy strategy. In recent years its approach to partnerships has become generally more strategic through targeted and bolder partnerships on security and defence, clean transition, critical minerals, trade and investment. The extent to which it can continue expanding these partnerships, however, will also depend on its competitiveness of its offer relative to China, the US, the Gulf and other actors, as well as on whether partners continue to view the EU as a reliable and strategically consistent actor that helps them address their own economic, development and security needs.

In a more competitive environment, the EU needs to balance tensions between its domestic economic and industrial objectives and its broader geopolitical and foreign policy ambitions. These tensions are becoming increasingly pronounced in its relations with partners across the Global South, particularly as the EU also navigates a more difficult relationship with China. Trade and industrial frictions with China have intensified over concerns about overcapacity, pressure on European industries, economic dependencies and the weaponisation of supply chains, including those critical to the clean transition. China has, in turn, criticised measures such as CBAM, the proposed Industrial Accelerator Act, “Made in EU” requirements and steel safeguards, portraying them as protectionist, politicised and evidence of European double standards.

While these arguments clearly serve China’s own strategic interests, parts of this narrative resonate with existing concerns in Africa and elsewhere in the Global South that Europe’s green and industrial policies are designed to protect its own markets while offering insufficient finance, technology transfer and support for adaptation and development. Such narratives can erode trust in Europe’s climate agenda, weaken its ability to build coalitions in multilateral forums, and make partners more receptive to competing Chinese economic and political offers.

The EU will need to respond through delivery as much as through messaging. Stronger European industry and economic security must be accompanied by partnerships that create visible local value, respond to partners’ priorities and offer credible access to finance, technology and markets. The lessons from CBAM are particularly important: future initiatives, including critical raw materials and clean transition partnerships, should be developed through earlier consultation, greater transparency and clearer benefits for producing countries.

The EU is also expected to play a more important role in addressing the international climate finance gap. While shifting priorities and recurring crisis are impacting EU Member State budgets, there are creative ways through which the EU can sustain its position as a

global climate finance leader. The upcoming EU budget's more integrated architecture offers an opportunity to address the growing climate finance needs by making it possible to embed climate finance within economic development programmes and strategic partnerships. The EU can also better leverage the future Global Europe Instrument in favour of a more competitive partnership offer, and make sure that its approach also offers technical assistance on governance, regulatory framework and transparency. This will help to build trust and create a safer environment for EU investors to develop projects in these countries that are sustainable and contribute to economic development, jobs, infrastructure development and technological transfer. Doing so would strengthen both the investment environment for European businesses and the EU's credibility as a long-term strategic partner.

Recommendations

Make the clean transition a foreign policy priority, and make partnerships with Global South partners more attractive, locally beneficial and delivery focused

- ▶ EU foreign policy should prioritise the global clean transition as a means to both build economic resilience and hold the line as an important player in defending climate action and shaping the conditions of the transition towards one that remains just and creates local economic value.
- ▶ The EU can build further on existing initiatives and partnerships to deepen and expand cooperation with key partners. With India, for example, it can build on the momentum created by the recently concluded FTA negotiations and the new Security and Defence Partnership to connect security cooperation more closely with clean industrial development, resilient supply chains, climate-resilient infrastructure, and early warning and preparedness for climate and geopolitical risks.
- ▶ The EU should also work on resetting relations with African partners, by adapting its partnership approach more closely to tailored regional and country specific priorities: addressing growing needs around adaptation and resilience, protection from climate impacts, water security and agricultural development.
- ▶ To be credible with partner countries and attractive to European businesses, the EU's clean transition partnerships should seek to combine local value creation with commercially viable projects and more predictable, longer-term financing. These should also seek to simplify project pipeline development and financial criteria to reduce the time of implementation. This requires integrating policy dialogue, technical assistance and finance more systematically within the governance structures of partnerships, so that agreed priorities can be translated into investable projects.

Use the upcoming Global Europe Instrument to hold the line on finance and strengthen Global Gateway

- ▶ The EU and its Member States should continue scaling up their own climate finance provision while using their collective position as the largest provider of public climate finance to build a renewed partnership offer that is more responsive to developing countries' priorities on adaptation, debt, and vulnerability, while also using their collective shareholder influence to encourage multilateral development banks do the same.
- ▶ The Commission and Member States should seek to include systematic climate resilience screening for Global Gateway investments within the next Global Europe Instrument, ensuring that major infrastructure projects – including ports, energy grids, digital networks and other strategic infrastructure on which military movements depend – are stress-tested and climate proofed against heat, flooding, drought, wildfire and water scarcity, ensuring long-term operational resilience under worsening climate conditions.
- ▶ The Global Europe Instrument under the next MFF should also address some of the shortcomings of the Global Gateway by adapting financial support to the needs of highly indebted countries, including through a larger grant component, and by providing technical assistance to help partners meet the investment, regulatory and implementation criteria for major infrastructure projects.

Create an umbrella Clean Transition Compact

- ▶ Bringing the EU's existing clean transition partnership models under one flexible umbrella for existing and future initiatives can help make its external offer clearer, more competitive and easier for partners to navigate. It would allow a more comprehensive offer across trade, industry, energy, climate and security, aligned with internal and external policy objectives. It would thereby help make the EU's partnerships greater than the sum of their parts by reducing duplication between overlapping partnerships, and enhance cooperation on clean energy (battery, solar, grids, wind), critical minerals supply chains, adaptation and resilience, tailored to partners' priorities.
- ▶ The Compact can be supported by regular mapping and stocktaking to identify gaps and assess the effectiveness of the partnerships under this umbrella. This will allow existing and new economic partnership models (such as CTIPs, or CRM partnerships) to be deployed, evaluated and adapted as global climate and energy transition dynamics evolve.

Advance climate security in the EU's security and defence architecture and partnerships with third countries

The deterioration of the EU's security environment over the past decade, and the broader challenges to the international security, have brought with them new threats to European security. The worsening impacts of climate change add to this, posing risks to energy security, economic resilience and direct threats to military capabilities.

Energy infrastructure has become a major military target, visible in Russia's hot war against Ukraine and hybrid warfare operations against Europe, and the conflicts in the Middle East. Ongoing crises have additionally exposed the vulnerability of military operations due to dependence on fuels that are mostly imported from outside the EU, as covered in a recent report.⁸ Energy will therefore remain a core security and defence concern in a more insecure global context. Recognising this, the EU is already taking concrete steps to build resilience, protect critical infrastructure and reduce vulnerabilities through diversification of partners and energy sources.

The situation is slightly different when it comes to climate security. Climate risks continue to be framed merely as "threat multipliers", coming secondary compared to most conventional threats. Yet intensifying climate impacts over the past years and recurring energy disruptions⁹ have increased the pressure on European economies and households, which will likely have a more direct impact on political stability and the EU's internal security.

There is already recognition of the risks that climate change poses to defence assets and military installations, including through sea-level rise and disruptions to energy and water supplies. But as extreme heat, flooding, wildfires and drought are accelerating in Europe, these risks are taking on another dimension and become an immediate security and operational concern.¹⁰ In the period ahead, more frequent climate shocks are likely to disrupt transport and communications networks in the EU and abroad, affecting logistics and military mobility. Operational effectiveness and troop readiness and morale are declining as well, as militaries are increasingly being diverted to provide natural disaster relief, at a time when greater deterrence is needed at home and overseas.

The EU and the UK are now bringing the issue higher on the political agenda and their partnership priorities. This has also been demonstrated recently with a high-level meeting

⁸ European Union Institute for Security Studies, June 2026, [Defending Europe, Deterring Russia](#)

⁹ E3G, 27 August 2026, [What this summer's heatwaves mean for the EU's climate resilience and energy security](#)

¹⁰ See for example: NATO, July 2024, [NATO Climate Change and Security Impact Assessment, Third Edition](#); Metis Institut for Strategy and Foresight; adelphi research gGmbH, Bundesnachrichtendienst (Federal Intelligence Service, BND), Potsdam Institute for Climate Impact Research (PIK), February 2025, [National Interdisciplinary Climate Risk Assessment](#)

co-hosted by the foreign ministers of the EU, the UK and Kenya on the sidelines of the UN General Assembly in New York agreeing to mitigate the impacts of intensifying climate shocks and pushing to free up finance for building resilience.

This momentum can be taken a step further towards the EU and UK co-initiating a sustainable high-level cooperation framework for climate security with other international partners.

For the EU, this also reinforces the need to integrate climate risks more systematically in the emerging security strategies and partnerships, and into the more recent defence capability, investment and readiness priorities of the White Paper for European Defence – Readiness 2030 and the subsequent Defence Readiness Roadmap. The EU is also adapting its international security policy, expanding bilateral Security and Defence Partnerships with third countries. Since 2024, it has signed twelve such partnerships, covering areas including cyber and hybrid threats, military mobility, crisis management, maritime security and space security. Their flexible nature makes them a useful vehicle for integrating climate-related risks more systematically into the EU's international security policy.

Yet here too, climate security, energy, and economic resilience are not systematically embedded in these agreements. Climate security features with varying levels of ambition, in the agreements with the UK, Canada, Ghana, Iceland and Australia. The Ghana partnership focuses mainly on climate change as a risk multiplier for conflict.¹¹ Canada goes further, foreseeing closer cooperation on infrastructure resilience, operations and planning, including coordination through a Climate and Security Dialogue and cooperation through NATO.¹² The partnership with Australia similarly addresses climate-related impacts on defence infrastructure, equipment, readiness and operations.¹³ Climate security however does not appear as a dedicated component in the partnerships with India, Japan or South Korea.¹⁴

The EU's external climate agenda is also increasingly contested in the information space. Climate and clean-transition narratives are targets of information manipulation both within the EU and in partner countries. Beyond denying the science of climate change, there is growing evidence that the nature of climate disinformation is evolving. The 2025 HEAT study covering France, Germany and the Netherlands found that climate narratives are being linked to culture politics, conspiracy narratives, distrust of institutions and foreign influence.¹⁵ Pro-Russian messaging portrays EU climate and energy policies as

¹¹ European Union & Republic of Ghana, 24 March 2026, [Security and defence partnership between the European Union and the Republic of Ghana](#)

¹² European Union & Canada, 23 June 2025, [Security and defence partnership between the European Union and Canada](#)

¹³ European Union & Australia, 18 March 2026, [Security and defence partnership between the European Union and Australia](#)

¹⁴ Council of the European Union, 24 March 2026, [Security and defence partnerships](#)

¹⁵ EU DisinfoLab, 23 June 2025, [HEAT: Harmful environmental agendas & tactics: A look at France, Germany, and the Netherlands](#)

“economically damaging, authoritarian or hypocritical”¹⁶ and beyond Europe, in parts of Africa narratives such as “climate conditionality is another form of Western control”, “Europe demands decarbonisation from others while protecting its own industries”, have nurtured an overall sense that Russia and China are more reliable partners.¹⁷ This constrains the EU’s ability to build support for cooperation and transition policies.

Recommendations

Use the forthcoming European Security Strategy to move climate security high in the agenda

- The EU’s forthcoming European Security Strategy should treat climate security as a priority within its broader assessment of European threat environment, ensuring that it is systematically integrated across defence, hybrid threats, economic security, preparedness and resilience.

Integrate climate into the EU’s security and defence partnerships with third countries and update strategies for a scenario that exceeds 1.5 °C of warming

- As the EU prioritises defence and security, including through renewed investment in defence industries and the diversification of partners, it should more systematically integrate climate considerations into emerging strategies and partnerships, in the procurement, resourcing and budgeting processes. This is increasingly necessary as defence assets, infrastructure and military operations are exposed to climate risks that can directly affect resilience, operational effectiveness and deterrence capacity.
- Energy and climate resilience and security-of-supply criteria should be incorporated into procurement supported through SAFE and EDIP. These instruments should be used to diversify CRM supply chains, and increase European production and recycling of batteries and critical components used in drones, electronics, chips and semiconductors while coordinating these measures with external partnerships that diversify access to critical inputs.
- EU institutions and Member States should also update defence and security strategies to prepare for a world in which global warming is likely to exceed 1.5 °C within the next five years. Strategies will need to account for additional adaptation requirements across defence and transport infrastructure, operational readiness, water and food security, and the increased risks of political and security instability resulting from rising temperatures and growing pressure on societies and public institutions.

¹⁶ EUvsDisinfo, 2 August 2023, [The Kremlin’s climate camouflage. European External Action Service](#)

¹⁷ European External Action Service, August 2025, [2024 report on EEAS activities to counter foreign information manipulation and interference \(FIMI\)](#)

Embed climate risks more systematically into EU hybrid-threat assessments and preparedness

- ▶ Better integrate climate risks into foreign policy and threat assessment by using climate impact data to anticipate geopolitical, economic, political and societal shifts.
- ▶ Hybrid-threat assessments by EU institutions and Member States should examine how hostile actors may exploit climate-related disasters, energy disruptions and transition-related grievances through disinformation, economic coercion, cyberattacks or attacks on critical infrastructure.
- ▶ Relevant scenarios should be incorporated into exercises and preparedness work conducted under the Hybrid Toolbox and Strategic Compass. Climate risks should be treated as vulnerabilities that adversarial powers can exploit to weaken resilience, stability and public trust.

Make strategic communications and counter-FIMI work a priority for the EU's foreign policy posture on climate

- ▶ The EU should integrate monitoring, analysis and response capabilities into its external climate policy toolbox. To this effect, the EU could deepen cooperation with G7 and NATO partners, including Japan, and with other experienced partners such as Taiwan and other like-minded allies facing similar challenges. Such exchanges can share best practice, share information on emerging narratives and threats, and consider coordinated responses.

Anticipatory resilience: preparing for shifting strategic dependencies and climate security risks

In a more uncertain geopolitical context, EU foreign policy increasingly needs to anticipate how climate impacts, supply chain disruptions and economic coercion can interact and cascade across borders. Traditional crisis anticipation and management tools are often no longer sufficient in a transactional setting where agreed rules and procedures tend to be sidelined to pursue short-term interests. The interdependence of overlapping vulnerabilities and crises, their rapid emergence and cascading effects make them harder to foresee and manage. This becomes even more relevant in the context of the cross-cutting nature of the global energy transition and climate change impacts and as economic coercion becomes a more salient geoeconomic and geopolitical tool.

However, each new crisis reinforces the case for shifting the strategic focus towards longer-term resilience and security, in turn increasing the EU's geopolitical influence. The EU can look on positive examples of how it has responded to crises and challenges to increase its resilience, but also lessons to be learned in order to better anticipate and respond to future events. These lessons are bound up with the global climate and energy transition,

due to the EU's current ongoing reliance on continuous fossil fuel imports, and therefore vulnerability to supply disruptions, as well as due to the vulnerability of the EU to cascading consequences of climate impacts.

Anticipatory resilience involves anticipating new dependencies that could arise when reducing existing ones. The REPowerEU initiative strengthened energy security by accelerating the energy transition in response to the shock triggered by Russia's invasion of Ukraine; it successfully cut gas consumption by 20% compared to 2021 levels. It also sped up diversification away from Russian fossil fuel towards LNG imports. In the short term, besides providing energy security, is also significantly reduced Europe's exposure to Russian leverage.¹⁸ However, replacing one form of energy dependency with another creates other security concerns. According to data from early 2026, the US accounted for 63.2% of EU LNG imports, up from 53% in 2025 and 29% in 2021.¹⁹ Moreover, expanded LNG infrastructure and long-term supply contracts risk creating lock-in effects such as increased exposure to global LNG market volatility,²⁰ maritime chokepoints,²¹ and economic coercion. Lock-in to LNG can also create uncertainty about the EU's long-term commitment to the clean transition, which can weaken investor confidence as planning security is needed to strengthen sustained investments in Europe's strategic autonomy and long-term competitiveness.

In contrast, renewable energy systems are not reliant on continuous imports while in operation, but are more exposed to upstream dependencies on CRMs and manufacturing capacity. The clean energy future therefore also brings strategic questions related to sovereignty and economic security, particularly as the EU seeks to reduce excessive and asymmetric dependencies on China. The war in Iran and its implications for energy and economic security have renewed momentum for transitioning away from fossil fuels and accelerating clean energy deployment, particularly through speedy electrification. Yet, this is unfolding amid mounting tensions with China over trade, industry and supply chains.

The broader reality therefore is that, while the clean energy transition reduces vulnerabilities associated with fossil fuels, it also creates new forms of strategic exposure. These dependencies operate over different timescales:²² A restriction on solar panel supplies, for example, would not affect existing installations but could delay future projects and deployment. A restriction on fossil-fuel supplies, by contrast, can produce immediate energy shortages and price shocks.

These challenges become even more pressing as the strategic use of economic levers – both by the EU and against it – has moved to the centre of EU policymaking. The

¹⁸ European Commission, 21 May 2026, [EU energy markets: evolving gas-electricity price linkages in a more volatile system](#)

¹⁹ Eurostat, 22 September 2026, [US supplied 63% of EU LNG imports in Q2 2026](#)

²⁰ CSIS, May 2026, [Beyond Russian Gas: Trade-Offs in EU Liquefied Natural Gas Diversification](#)

²¹ E3G, March 2026, [Beyond Security Supply: Chokepoint risk for oil and gas importers](#)

²² Ibid.

Commission's ReSourceEU Action Plan, the future Industrial Accelerator Act (IAA) and its "Made in EU" provisions reflect a broader shift towards managing strategic dependencies in CRMs, clean technologies, aerospace, defence and other strategic sectors. These initiatives can strengthen European industrial capacity and create demand for clean technologies. In the medium to long term, however, the EU's strategy should combine accelerated clean energy deployment and investments in electrification with diversification, domestic industrial and infrastructure investments, recycling, strategic reserves and international partnerships designed to reduce excessive dependencies across critical supply chains.

While anticipatory resilience concerning the global energy transition and in light of geoeconomic coercion are one side of the coin, the EU must also prepare for increasing geopolitical and security risks arising from climate impacts. The EU's competitiveness and resilience have been affected in the past decade by outside events exacerbated by climate change with repercussions for food security, fragility, migration and regional security. The EU's response to such events largely focused on security cooperation, development assistance, resilience programmes, and climate adaptation through various instruments, for example in the contract of the drought in the Horn of Africa from 2020–2024, the Pakistan floods in 2022 or continuous climate stress and fragility in the Sahel since 2015. The drought in the Panama Canal in 2023/2024 did not see a dedicated broader policy response by the EU but underlined how climate risks can affect supply chains.²³ In the Pacific island countries, through the Green-Blue Alliance the EU offers support for adaptation and resilience, and cooperation on oceans and sustainable infrastructure development for natural resource management.²⁴

These events showed how climate impacts amplify existing political instabilities and conflict risks and can disrupt global trade and strategic supply chains EU businesses depend on, including through cascading effects. Political instabilities can also become a barrier to market access for the EU and its business as well as regional security interests. While showcasing the EU's rapid response mechanisms, these events also demonstrate the need for the EU to both prevent and build anticipatory resilience to climate security risks and link early warning systems more closely with broader foreign policy responses. This includes translating geopolitical considerations of climate risk in preventive and early responses before impacts translate into humanitarian, economic and political repercussions that constrain the EU's ability to act. While 2023 Joint Communication on the Climate and Security Nexus is one initiative towards this, an intensifying El Niño will provide an important test case for the EU's anticipatory climate security in a warming world in the near future.²⁵

²³ In May 2026, the "Nature-Based Solutions in the Panama Canal Basin" project was **announced**. The project is co-promoted via **Euroclima**, which is part of the EU's Global Gateways strategy.

²⁴ European Commission, Directorate-General for International Partnerships, n.d., Pacific Islands countries, https://international-partnerships.ec.europa.eu/countries/pacific-islands-countries_en

²⁵ WMO, 3 September 2026, **[El Niño set to become very strong, raising risks of extreme weather into 2027](#)**

Recommendations

Embed climate engagement with China within a broader long-term European economic security and resilience strategy

- This requires the EU to move beyond its current reactive and often fragmented approaches towards a common framework that distinguishes between different degrees of vulnerability and areas where cooperation with China has strategic value for the EU and the global climate and energy transition (e.g. decarbonisation, multilateral climate governance) and those where asymmetric dependencies require greater diversification and stronger economic security measures (e.g. batteries, grid components, and critical minerals). This strategy should be supported by sector-specific risk assessments examining how economic coercion, export restrictions or disruptions in the South China Sea could affect the technologies underpinning the clean transition.
- As Europe accelerates electrification, the EU should integrate security-of-supply, cyber-security, procurement safeguards and diversification criteria in the wider grid legislation, within the next MFF Global Europe Instrument, Connecting Europe Facility for Energy (CEF-E), and other EU financing instruments for clean energy technology.

Institutionalise regular stress tests, scenario exercises and red-teaming across EU institutions and Member States to assess vulnerabilities

- This concerns in particular vulnerabilities arising from hybrid threats, climate-related disruption including climate impacts, economic coercion, and critical supply chain shocks. Such exercises should examine how different risks could interact and generate cascading effects, for example, how an extreme weather event, energy disruption or raw material shortage could be amplified by cyberattacks, economic coercion or hostile information operations. Where useful, these exercises should draw on the experience of partners facing similar compound threats (for example drawing on lessons from Taiwan's Whole-of-Society Defence Resilience Committee²⁶), while adapting these approaches to the EU's institutional and political context. The results should inform diplomatic priorities, partnership design and contingency planning with third countries.

Connect early warning and foresight more systematically to pre-agreed external response options

- Building on the European Preparedness Union Strategy, and analysis from the EU Emergency Response Coordination Centre, the EU should develop flexible packages of financial, technical and humanitarian support that can be activated when early warning systems identify likely disruption in highly vulnerable or strategically important partner countries, for example to climate change impacts. Such support would strengthen the resilience of partner countries, protect critical supply chains, strengthen regional

²⁶ Office of the President of Taiwan, [Whole-of-Society Defense Resilience Committee](#)

security, and reinforce the EU's reliability as an international partner. Relevant planning and foresight can be drawn from the European Strategy and Policy Analysis System (ESPAS) and the Single Intelligence Analysis Capacity, and further utilise intelligence and assessments gained by Member States where appropriate. For example, the EU could prepare flexible packages for targeted support to respond to El Niño impacts.

Accelerate efforts to coordinate preparedness for possible disruptions in critical raw materials and selected strategic components

- Using the Critical Raw Material Act, the EU Raw Materials Platform and the to be established European Critical Raw Materials Centre to coordinate pooling demand, supporting joint purchasing and connecting companies with storage providers through strategic stockpiling. Over time, this approach should include not only EU Member States and EEA countries, but also candidate countries and other strategically aligned partners, turning raw material preparedness into a broader tool for anticipatory resilience and strategic cooperation with partner countries.

Connect multilateral climate ambition with sustained implementation

Multilateral engagement on climate has long been one source of EU leadership and soft power. Multilateral climate institutions remain an important source of EU influence, providing platforms through which it can build coalitions, shape international rules and connect climate cooperation to finance, development and real-economy implementation.

The Paris Agreement and the international climate regime remain essential for setting collective goals, strengthening national ambition and maintaining international accountability. With the “Paris Rulebook” – which lays out procedures and rules for the implementation of the Paris Agreement – completed, the international climate regime will need to be more efficient and effective to accelerate implementation. At the same time implementation is highly dependent on national political and economic conditions, access to finance, technological capacity and sustained international cooperation. Insufficient finance to cover climate needs, entrenched positions about the provision of climate finance, competing development priorities and domestic political constraints have all contributed to the persistent gap between internationally agreed goals and delivery.

Moreover, the balance of power within climate diplomacy is changing. Shifting weight and influence, including the retreat of the US federal government alongside growing influence and self-confidence of emerging markets and developing economies, have challenged the EU's traditional approach to climate diplomacy.

These shifts pose a strategic challenge for the EU. Its influence has traditionally rested on support for a predictable, rules-based international order, yet it now has to operate in a

more transactional environment while maintaining that credibility. Furthermore, sustaining consensus and implementation on COP commitments has become more difficult in the increasingly fragmented and conflictual international context.

To a certain extent, the EU is adapting its approach through earlier coordination, improved ownership among Member States, and by seeking to drive action through coalition building initiatives. These are often issue specific – such as the Global Energy Transitions Forum, the Global Methane Pledge or the Open Coalition on Compliance Carbon Markets with Brazil and China – and often fragmented across policy areas and political processes. Their long-term value depends on whether they are sustained, adequately resourced and connected to countries' wider transition and development priorities with the Global Implementation Accelerator.

Recommendations

Invest political capital in an effective and credible multilateral climate regime

- ▶ The EU and its Member States must remain a reliable partner and invest political and domestic capital to make multilateral institutions, particularly those relevant to the international climate regime, more effective and efficient. In parallel, the EU and its Member States need to build a targeted diplomatic strategy to build alliances and coalitions, including with traditional multilateral partners such as SIDS, AOSIS and AILAC, while ensuring communication channels with non-aligned countries.
- ▶ In light of the broader evolution of the COP, the EU and its Member States can support its future effectiveness by ensuring that policymakers from ministries of finance, foreign affairs and economy join the negotiations and adjacent spaces such as the Action Agenda.

Use the period leading to the Second Global Stocktake (GST2) and 2030 to strengthen implementation and prepare the next round of national commitments

- ▶ EU institutions and Member States should strive for a longer-term vision and a clear political and procedural pathway to GST2 (which concludes in 2028), ensuring visible progress on under-implemented GST1 outcomes and building the political appetite for renewed ambition through COP33. Priorities for the EU can include closing the remaining submission gaps for countries' third iteration of their Nationally Determined Contributions (NDCs), supporting credible implementation and investment planning, advancing support for a quantitative electrification target, improved collection of scientific evidence base for the GST2 including through the IPCC's Seventh Assessment Report, and accessibility to climate finance.
- ▶ Working closely with the COP29–31 Presidencies Troika, the EU and Member States can help ensure the Global Implementation Accelerator, Belém Mission to 1.5, Roadmaps on

the Transition Away from Fossil Fuels and Ending Deforestation, and new dialogues on finance and trade generate credible evidence of how the implementation of GST1 is progressing, and demonstrate meaningful progress.

- ▶ Rebuilding trust by strengthening support for adaptation, resilience, and loss and damage while deepening partnerships with climate-vulnerable countries remains important to unblock certain aspects of the negotiations.
- ▶ The EU can build momentum on the fossil fuel transition by defending the outcomes of GST1, supporting the operationalisation of its energy package to accelerate a clean energy transition that strengthens resilience, recognising investment treaties as a systemic barrier to implementation, and supporting countries in developing national roadmaps to transition away from fossil fuels.

Advance plurilateral coalitions of the willing where universal agreement is not possible to accelerate implementation

- ▶ Platforms such as the Champions Group for Adaptation Finance and the Climate and Development Ministerial can be used more strategically and to combine political commitments and technical cooperation with adequate finance and measurable implementation. The EU and its Member States should assess existing coalitions regularly and invest in those capable of sustaining delivery and avoid creating additional initiatives without clear governance and resources. Furthermore, the EU can showcase its own initiatives at COP.

Use G7 and G20 to connect climate action and cooperation with growth, financial stability, supply chains, and development

- ▶ The UK's upcoming presidency of the G20 presents an opportunity for closer EU and UK cooperation to ensure that climate is integrated in the G20 agenda and to frame it as an integral part of international and economic security policies.
- ▶ The Commission and participating Member States should place the concerns of emerging and developing economies more firmly at the discussion and recognise the changing threat environment and economic dynamics due to intensifying climate impacts and geopolitical tensions.
- ▶ This should include **mainstreaming climate considerations across core Gs' workstreams** while allowing for flexible cooperation where full consensus is not possible.

Conclusion

The EU's geopolitical influence not only depends on the instruments at its disposal, but also on its ability to prioritise them at the highest political level and align them behind shared strategic objectives. Major powers can compel action unilaterally. The EU's ability to shape international outcomes runs through its capacity to build internal consensus.

The EU's internal resilience increasingly depends on its ability to exercise foreign policy effectively. In this context, any EU foreign policy strategy aimed at strengthening competitiveness, security and global influence cannot afford to sideline climate policy. Recent conflicts and geopolitical tensions have exposed the vulnerabilities created not only by dependence on imported fossil fuels, but also by over-reliance on concentrated supply chains for the critical minerals, technologies and components needed for the clean transition. The transition itself is becoming a central arena of geopolitical competition.

As this competition intensifies and multilateral institutions come under growing pressure, the conditions for international climate cooperation are also changing. The EU's ability to leverage its large and stable market, regulatory power, financial instruments and diplomatic reach will increasingly determine whether it can shape the global transition in ways that strengthen both its own economic security and that of its partners. This will require recalibrating relations with China across trade, industrial policy and climate cooperation, while ensuring that efforts to reduce strategic dependencies do not undermine the shared global interest in accelerating the transition and supporting sustainable and resilient economic development. It will also require greater investment in bilateral and plurilateral partnerships that combine diversification of critical-mineral and clean-technology supply chains with technology cooperation, local economic development, trade, investment and broader security cooperation.

The ongoing crises of recent years offer broader lessons for EU foreign policy. First, the clean transition is reshaping the international distribution of power. The EU therefore needs to anticipate how new technologies, dependencies and economic relationships will affect its geopolitical position and its ability to shape the global transition. Second, the growing pressures from climate impacts will increasingly affect security and stability, making adaptation and resilience a more important component of Europe's external, security and defence policies.

The coming months provide several opportunities to put this approach into practice. At the European Council meetings, in the upcoming summit with Canada, the UK, at COP31 and G20 summit, the EU and its Member States should frame climate and the clean transition more consistently as questions of security, economic resilience and geopolitical influence and align their external offers and diplomatic priorities accordingly.

ABOUT E3G

E3G is an independent think tank working to deliver a safe climate for all.

We drive systemic action on climate by identifying barriers and constructing coalitions to advance the solutions needed. We create spaces for honest dialogue, and help guide governments, businesses and the public on how to deliver change at the pace the planet demands.

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