

# Climate Foreign Policy in Times of Geopolitical Disruption

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## I. Introduction: The Opportunity in Disruption

Many thanks Dr. Goldthau. Distinguished faculty, students of the Brandt School, and guests—it is a profound honor to be here at the University of Erfurt and to have the opportunity to share my thoughts with you this evening.

This city holds a **special place** in the history of German and European diplomacy. It was here, in March 1970, that Willy Brandt stepped to the window of the Erfurter Hof and was met with the cheers of a people yearning for a different future. That moment was the heartbeat of Ostpolitik—the **courage to acknowledge a difficult reality in order to change it**.

We gather today in January 2026 at a moment of **similar gravity**. I believe we are living through a "global 1989." When the Wall fell, it signaled the end of a world that was divided by the Iron Curtain and the birth of an international rules-based world where multilateralism is respected. But today, those certainties are shattering. We are at a **hinge point** where what worked before will no longer work - and we are moving into a **new epoch** and we must be honest - we do not yet know how it will turn out.

It is a moment that feels fundamentally **unmoored**. The "certainties" of the last thirty years—stable trade, a predictable transatlantic alliance, a shared rules-based order and a climate that still seemed somewhat controllable —have been replaced by a "Massive Time of Disruption."

However, As Willy Brandt said in his Nobel speech in 1971, "**The uncertainty of the present time must not be permitted to make us uncertain, too.**"

But let us be clear: in moments of profound disruption, **the space for transformative change opens**. Brandt's *Ostpolitik* was not born in a time of comfort, but in the frost of the Cold War. It was a strategy for a world in flux. So as we know, every disruption also carries the chance for a change for the better in it. The European Union has to take the chances that lie ahead and not freeze in disbelief and fear.

Because the way the European Union steps into this vacuum today will determine its role in the 21st century. It will decide whether the EU remains a **sovereign architect of its own future**, providing **prosperity and security** for its citizens, or become a mere **playground** for the ambitions of others.

It is in this context that I join you today to discuss **Climate Foreign Policy in times of geopolitical disruption**.

The climate issue started as, and continues to be, a topic of **scientific interest and study**. And

that science, through the **Intergovernmental Panel on Climate Change, and the National Academy of Sciences around the world**, has informed decision-makers so that they could move forward - often led by environmental ministries and organizations. **It is of course environmental.**

However now, partially due to the fact that the impacts are happening so much faster than when I read my first IPCC report back in the mid-1990s to now, and the **tectonic plates** of geopolitics of energy are shifting under our feet, **it is clear that we must think about this issue much more broadly.**

The sometimes surprising and even uncomfortable truth is this: **Climate change is not only an environmental issue; it is the ultimate foreign policy issue.** It is the biggest security challenge of our time.

Just a few facts to see how it is changing our world:

- This past summer alone, a season of extreme heat, drought, and unprecedented floods cost the European economy an estimated **€43 billion** in short-term losses. This is not a projected future cost; it is today's reality.
- By 2050, an additional **78 million people in Africa** are projected to face chronic hunger due to climate change impacts. How will they survive? Where will they go?
- For the first time on record, **solar and wind power** are generating more electricity worldwide than coal, shifting economics and geopolitics.
- In 2024, the sales and investments in China's clean energy sectors **surpassed 10% of China's total GDP**. In 2023 **40% of GDP growth** in China came from growth in the clean energy sector.

This **duality**—the escalating **catastrophe coupled with accelerating economic transformation disruptions and opportunities**—is why the last German government decided to understand and treat climate change as part of the **operating system of modern foreign and economic policy.**

It is why when the government came into office in 2021, it decided to **integrate climate into the Federal Foreign Office, and add a third State Secretary**, who was also the Special Envoy for International Climate Action. I had the **honor of a lifetime** serving Germany in that role for Minister Annalena Baerbock.

We designed and implemented strategies as quickly as we could. And the context shifted immediately as I entered office - which was shortly after February 24, 2022, the beginning of the Russian war of aggression on Ukraine.

Suddenly Germany, and Europe were faced with a major energy crisis - while having just started a new government in which climate action was a priority.

My lecture today, and the propositions I will put forward, are based on the lessons I took from that time, but placed in our current context, **one of great disruption.**

## II. The Legacy of the Brandt Report is one from Survival to Sovereignty

To understand where we are going and find solutions, we must look at the blueprint left by the man whose name this school bears. In 1980, the Brandt Commission published North-South: A Programme for Survival.

Brandt was the first to draw the "**Brandt Line**," visually codifying the **economic chasm between the wealthy North and the developing South**. His core message was one of **Interdependence**: that the prosperity of the North was **inextricably linked** to the development of the South. He argued that we are an "**interlocking interactive system of people, ecosystems, and resources**."

Today, that understanding of interdependence between North and South must be internalized, updated and utilized to create a prosperous, stable and secure world.

### Energy, Economy, and Climate form a security triad

One of my key takeaways from my time at the Federal Foreign Office was the importance and necessity of **thinking many issues together**. It is vital to overcome silos and understand the various interdependencies in this complex world.

For example, we can no longer afford to treat energy, economic, and climate security as separate files.

**They are a single, urgent security triad.**

**Energy dependency is now used more and more as a weapon.**

We have seen how the "age of petrostates" leaves us fundamentally vulnerable, depending on oil and gas from countries that don't share our values. We experienced first hand what **our dependence on Russian gas had for implications**. Recent actions by the US administration show a readiness to use force and economic threats to secure **its energy interests**.

In June 2025, US strikes on Iranian territory prompted Iran's parliament to consider closing the Strait of Hormuz where [roughly 20 % of the world's oil and liquefied natural gas transits daily](#). A full closure would have severed a major artery of global energy trade, cutting off exports from Saudi Arabia, Kuwait, Qatar and the UAE. A single move would have disrupted supply to energy-importing economies worldwide. Luckily this did not occur, but our vulnerability is clear.

The EU is also caught in a dependency trap with the US. In late 2025, the United States became the **largest partner for EU LNG imports, with a share of nearly 60%**. This is a dangerous time to be so dependent on President Trump for our energy needs.

**Economic Security is the top priority for all**

In the evolving landscape of the "Security Triad," economic stability is central and is the driver of domestic politics and policy around the world.

From Brussels to Brasília, the primary mandate for governments has narrowed to a singular

focus: to securing large-scale industrial investment, to protect and create high-value jobs at home, and to ensure the affordability of daily life.

The geopolitical strategies discussed—be it de-risking from autocratic supply chains or forging new green corridors—are not merely diplomatic exercises, they are **essential to create economic stability at home**.

## Climate Security

The **German National Security Strategy** has three pillars: Robust, Resilient, Sustainable.

The Sustainable chapter was a new aspect in a Security Strategy, as much of foreign policy historically and currently has been focused on increasing a country's hard national security, with a rather **traditional definition** of security. This, of course, continues to be highly relevant and central. However, we decided that this is not fit for purpose anymore for a **modern foreign policy** - as there are a number of risks, including climate change, that require attention.

The German **Federal Foreign Office and the German Federal Ministry of Defence** therefore commissioned the **Federal Intelligence Service**, BND, the top military academy in Germany **Metis** and the Institute for Climate Impact Research (**PIK**) to assess the security risks for Germany.

They found climate change to be one of the **top five risks** facing Germany and outlined a series of risks. For example, **critical infrastructure vulnerability** from heat stress and coastal flooding, **increased conflicts** particularly in fragile states over water and fertile land and a **shifting international order** due to the global race for clean technology, minerals and supply chains.

**This is not soft security; it is core stability.**

## IV. Four Propositions for a Disruptive Moment

I have **four propositions** to make. Each of them is informed by the implementation of the Climate Foreign Policy. We worked in a Team Deutschland, all of government approach, to utilize every lever we could to **catalyze greater emission reduction abroad** to keep the Paris Agreement goals in sight, while creating **opportunities for Germany economically**. There are many other areas I could offer but these seemed most appropriate for this moment.

### 1. We need to De-risk from the USA and become more independent:

Our first priority must be to reduce our dangerous dependency on a partner that has become increasingly transactional and volatile. This is an incredibly difficult thing to imagine and to say, but I think we must face the situation head on, name it and move forward.

- **The Tactics of Coercion are increasing and unacceptable:** We see a Trump administration ready to use military force to secure resources, even against NATO allies.

President Trump's repeated threats to "annex" or buy **Greenland**—a territory of NATO partner Denmark—for its critical minerals and strategic location is an affront to European sovereignty. In **Venezuela**, the capture of President Maduro and the focus on "oil at any cost" shows that international law is no longer a constraint for Washington.

- **LNG and Methane Bullying:** As part of the trade agreement with the U.S., the EU pledged, to purchase a total of \$750 billion worth of energy from the United States, a number inconsistent with EU energy and climate law. Additionally, the US, with Qatar is pressuring the EU to severely weaken its landmark **Methane Regulation** demanding a full repeal of the law.

**It is clear that we must double down to ensure our energy supply is beyond the reach of unilateral American pressure.**

Of course this does not mean that we close all doors to the US - **Derisk not decouple**. Europe should continue to work with the federal Administration wherever possible but **even greater effort** should go to increasing European engagement with sub-national actors - states and cities. **America is All In**, is a coalition of states and cities for climate action. It now represents over 160 million Americans and nearly \$10 trillion in GDP, effectively making "subnational America" the world's third-largest economy dedicated to the Paris goals. **Many ready partners.**

There are already **creative and effective new partnerships emerging**. For example, Germany recently signed a Joint Declaration of Intent with South Carolina on energy resilience, automotive sustainability, and life sciences. It focuses on how to accelerate sustainable energy and mobility technologies and building the workforce to deliver.

**Cities** are driving changes that impact global supply chains. For example, the LA-Long Beach-Shanghai Green Shipping Corridor has achieved 100% shore-power capability at its ports as of late 2025, forcing global shipping to decarbonize regardless of federal mandates.

**How to proceed?: Find the common interests, identify the common goals and create new collaboration that benefits both, while derisking from the United States on energy.**

## **2. We need to Refocus our Gaze - East and South**

To derisk from the U.S. federal government, we must refocus our gaze away from the trans-Atlantic and toward the regions where the 21st-century **energy, economic and climate architecture** are actually being built: In Asia, Africa and South America.

- **A. Look East - The China Deal:** China is no longer a maker of "cheap stuff"; it is an industrial titan, and one with **tremendous influence over our broad security**.
  - **One in five EVs globally are Chinese.** And China has managed over the years to become the leading refiner of 19 out of 20 **strategic minerals**. It has been ready to use this dominance, as a tactic against U.S. tariffs, through export controls, which impacted Europe of course as well. It is an critical trade partner for the EU.
  - It is also, last but not least, the largest emitter of greenhouse gases. **China's future development and path to decarbonisation will determine whether Europe, and the world, has a chance to avoid a rise in temperature above 1.5 or 2 degrees C to avoid irreversible tipping points and tremendous costs.** It is

therefore in Europe's national interest that China quickly and at scale reduce its emissions. Yes, it is acting. It seems that emissions may have peaked and that there may be a structured decline of coal, but this is far from what is needed to secure climate stability.

- Thus: I believe we need a **pragmatic and ambitious deal with China** that brings **energy security, economic security and climate security to Europe, China and the world**. The EU offers a stable investment and trade relationship — while ensuring "Standort Europe" stays competitive—in exchange for **supply guarantees for critical minerals** and security measures to prevent Chinese control of European data. **In return**, China must **commit to such security measures**, fairer access to Chinese markets and **significant measures to reduce greenhouse gases**, for example a hard phase-out of coal and methane. This (along with other measures to promote investment in Germany and Europe) is how we can protect **Standort Europe**, create investment, ensure security and reduce climate disruption for Europe and the world.

- **B. Look South: New Paradigms of Partnership:**

But we must look South beyond China to some of the other BRICS countries. **BRICS**, a group of eleven nations, best described as the primary geopolitical and geoeconomic counterbalance to the Western-led G7 has grown in power and influence. They represent nearly 40% of global GDP (measured in PPP) and 49.5% of the world's population.

The EU can increase its collaboration with an important sub-set of BRICS countries - - **with countries that share many of our values and respect international rules and norms**. This group is **BASIC** - Brazil, South Africa, India and China. The co-benefits should bring prosperity, jobs and opportunity to both Europe and these countries.

For example, let's take **Brazil and the steel sector**. Building on our long-term partnership, we could create a **joint supply chain** - call it **co-manufacturing**. Green iron ore produced in Brazil with 100% renewables and shipped to Germany would **reduce steelmaking costs by 15%**, keep over **90% of German jobs**, reduce greenhouse gases and create a deep partnership with South America's most important economy. This would further also build upon the Mercosur Agreement.

Or let's take the **EU-South Africa Clean Trade and Investment Partnership (CTIP)** - a good **blueprint for how to increase collaboration**. This Partnership is a strategic framework designed to **accelerate the mutual transition to a low-carbon economy**. It secures supply chains for **critical minerals** like platinum while fostering **local green industrialization**. It moves beyond traditional aid by focusing on **"eye-level"** economic cooperation, facilitating European investment in South African renewable energy and hydrogen infrastructure in exchange for stable, sustainable access to the resources essential for the global energy shift.

Another BRICS country, **India**, offers significant opportunities across the board for partnership. For example, for **derisking from China on critical minerals and solar**. **Chancellor Merz's** recent visit to India to forge cooperation on renewables is a step in the right direction.

And this is not to mention the opportunities for deeper collaboration with countries like **Kenya** or

**Colombia**, seeking investment and opportunity for its people from renewable energy and being part of the green supply chain.

**My observation is that currently there are a number of pieces of this new foreign policy puzzle on the table. But there is not a proactive, joined up strategy that pulls those pieces together thinking energy security, investment, trade and climate together. One that is strong enough to be a counterweight to the unilateralism of the U.S.**

Scaling up and linking such partnerships would enable Europe to **confidently transition away from fossil fuels**, making us more energy independent from both the US, and China in the case of critical minerals. It would keep jobs and bring investment to Germany and Europe.

**These are examples on how 'climate' foreign policy will not only shift these major economies away from high carbon growth, it is a leverage point that will allow Europe to build new allies and establish more strongly its place in the world.**

### **3. We need a fundamental Reform of EU Foreign Policy**

**None of these strategic shifts**—de-risking from the US, new paradigms of partnerships with developing countries or a sophisticated deal with China—are possible if the European Union continues to speak with many different voices. The lack of a common EU Foreign Policy is not just a bureaucratic failure; it is a security vulnerability that enables leaders like Trump and Xi to **"play"** Europe.

A few years ago I was in Beijing and on one day the European Commission and two Member States had made separate 'offers' to China for energy partnerships or initiatives. Naturally Beijing took all three - and it was not clear to me how Europe or those member states were able to benefit.

During my time as State Secretary, I experienced how, **working together on Commission and Member State level, through a Climate Foreign Policy, we could better achieve our goals.** There are some measures we took that can be continued. We built common strategies around certain countries, shared intelligence and coordinated action. We created the capacity and coordination in **embassies** around the world so that also in capitals the EU spoke with one voice. That collaboration assisted us bilaterally but also in the international climate negotiations to achieve our priority decisions.

It is clear, however, that these 'practices' in the world we live in now are **far from adequate.**

**To move from being a "playground" to a truly global "player,"** the EU must consider at least two significant structural reforms:

- In regards to speaking with a unified voice, the EU must resolve the **dysfunctional setup** where the Commission and the High Representative (HR/VP) often provide parallel, competing visions. Reforms should give the High Representative a clear hierarchical role and direct control over the External Action budget, ensuring that the Union's "checkbook" and "diplomatic phone"

are finally aligned.

- We must also consider difficult changes, for example current consensus **voting rules** on many issues. We can no longer allow the "slowest ship in the convoy" to determine our collective pace. There are proposals on the table that would allow for quick, efficient decisions by Qualified Majority Voting in critical areas such as sanctions, human rights, and energy security.

**Such changes would ensure that Europe remains a global shaper and does not turn into a mere taker.**

#### **4. We need a new form of Multilateralism**

Europe is a "**multilateralist by necessity**." Extra-EU trade accounts for **45% of our GDP**. If the global order collapses into unilateralism, we lose, well just about everything.

Fortunately, not only Europe believes in **international rules and norms and multi-lateralism**, the vast majority of countries do as well. If the United States wishes not to participate right now, that is its sovereign right, **but others can and must move forward**.

This is a moment to come together around a '**new multilateralism**', one that intensifies a collaborative approach, not a unilateral one.

In the context of climate foreign policy, this is more important than ever because some of the fora that used to be vital for climate diplomacy and progress, like the **G7 and the G20**, will no longer be possible due to the Trump Administration.

The place where all countries, besides unfortunately the United States, come together is the Framework Convention on Climate Change and the Paris Agreement of 2015. The Paris Agreement has created a successful model and platform for climate action and collaboration with significant results. **Emissions rose by 18%** the decade before the Paris Agreement. During the decade after, they rose **by about 1%**. From a governance perspective, Paris provides an accountability platform. All countries have transparent national climate plans and have to participate in mandatory **measurement, reporting and verification**.

However, it is very clear that Paris **is not delivering enough**. According to the UN Climate Secretariat, all those national climate plans, if implemented, would only keep global average temperature at a rise of **2,3-2.5 degrees C**. The result would be climate chaos. The last time the earth was this warm was **3 million years ago, a time when the modern human species did not exist**.

It is clear that we need to accelerate the pace and scale of change. And we need to solidify the multilateral response. The annual gathering of the Conference of the Parties known as COP, therefore, will be more important than ever, particularly in a world where the G7 and G20 are unable to agree on this issue.

I have been to all thirty COPs - and I am aware that the COP has flaws and there is criticism - that they have not delivered enough, that so many people fly there, that there are too many fossil fuel lobbyists. There does need to be **reforms**. But I strongly believe it is an **important**



**platform that needs to be built up to meet this moment.**

At COPs, countries are made accountable about what they have or have not done. Once a year **Heads of state** have to grapple with this issue and explain to the world what they are doing. And the world's media attends and has to report on the issue. **We cannot lose that focus.** Especially, as it is the only forum where the countries whose very existence is threatened by climate change have a seat at the table - **the small islands**. And whether I was in a scientific organisation, leading one of the best known NGOs or State Secretary of a government, **the COP was a place to find new allies, understand the perspectives of different actors and create new exciting and effective partnerships for action.**

The COP **must** now do more. The Paris Agreement encourages coalitions to come together to accelerate implementation. This has recently started happening.

Here are just two examples:

In Belem, Brazil, the last COP, over 80 countries called for a Roadmap to accelerate the implementation of the transition away from fossil fuels. A group of 9 countries announced support last year for a Premium Ticket levy - a levy on private sector, first and business class tickets to raise funds for climate mitigation, adaptation and loss and damage.

This is the new multilateralism - In the pursuit of multilaterally agreed goals, groups of countries come together to **collaborate go beyond what consensus based decision-making (which the COP unfortunately has) enables**. Call it plurilateralism or mini-lateralism, these are initiatives striving to achieve the goals of a multilateral agreement.

But it is not only for countries - the COP is also a place where non-federal actors - states and cities, and non-state-actors like companies, scientific institutions, civil society, indigenous peoples come together to develop and implement bold ideas and solutions that create change.

**These four propositions would, I believe, create a stronger, more stable and prosperous Europe, but also strengthen the multi-lateral system. There is much work to be done to do so, starting with domestic action.**

## **V. Domestic strength is a condition for international strength**

The just and equity dimensions of the climate crisis are significant and when one thinks and acts globally, one must always have this in one's heart and mind. For countries that are suffering the most and **have done nothing to cause this problem** - poor African nations suffering from droughts and hunger, small island nations experiencing extreme storms and destruction, people in the Philippines still rebuilding from typhoons ten years ago, **the serious commitment of industrialized and wealthy countries to act is primary.**

**The influence that EU has had on climate action over the last years, with other countries, was primarily due to its own strength of action at home.**

The success of EU and German laws and policies to drive down emissions is what enabled me,

as State Secretary, to speak with **credibility** in my exchanges with developing countries and act as a **solutions-seeker** with them. And while of course Europe cannot solve this issue alone, our national action enables us to **bring other large emitters along**.

**But this is and must also about benefiting us.** Domestic action brings significant benefits to Germany and Europe - in economic, energy and climate security.

### **Climate Technology creates prosperity**

The energy transition is the **single largest job creator in modern European history**.

Cleantech made in Germany" now accounts for over 8% of German exports

Employment in the EU's environmental economy has skyrocketed from 3 million jobs in 2000 to over 6.7 million in 2025. **This sector is consistently outperforming the broader economy, growing at an annual rate of nearly 4%.**

The transition away from fossil fuels to a cleaner economy also **brings down costs and prices**. The myth, that renewables are too expensive, is dead. In 2026, the cheapest way to power a factory or a home in Europe is through wind and sun.

**As of 2025, 91% of all new renewable energy projects are significantly cheaper than the lowest-cost fossil fuel alternatives.** On average, solar power is now 41% cheaper than gas or coal generation, while onshore wind is 53% cheaper.

In the EU, net greenhouse gas emissions have fallen by approximately 37% compared to 1990 levels, while during the same period, the European Union's GDP grew by roughly 70%. This demonstrates a significant "**decoupling**" of economic growth from greenhouse gas (GHG) emissions over the past three decades. Meaning: The EU has managed to substantially increase its wealth while simultaneously reducing its carbon footprint.

**The connection between our national interests and strong international climate foreign policy have never been clearer. Therefore, the recent decision of the European Union to continue its goal to be the first carbon neutral continent by 2050 and committing to reduce emissions by 90% by 2040 was in our economic, energy and climate security interests.**

## **IV. Conclusion**

In conclusion, I **must come back to Willy Brandt**. He once said, "Peace is **not everything, but without peace, everything is nothing**." In 1980, he expanded this vision to include the "Peace of Survival"—the idea that a world divided between a wealthy, carbon-heavy North and a struggling Global South was a world destined for conflict.

Today, our data tells us that the "Survival Programme" Brandt envisioned is perhaps within our reach, not through charity, but through **courageous bold pragmatic decisions**.

The **Brandt Line** still exists, but today it is being redrawn by the access to clean technology and critical minerals. **Our task is to turn that line of division into a bridge of partnership.** When

we work with Brazil on Green Iron, or with South Africa on critical minerals, I think **we are practicing the ultimate form of Brandt's Interdependence.**

Recently during a visit to Warschau, I stood at the monument to the Ghetto Uprising, thinking of Willy Brandt's courageous and powerful gesture. I was reminded that **leadership is the courage to kneel before the truth so that we may stand up for the future. The truth of 2026 is that our old dependencies are our greatest weaknesses, and our new partnerships are our greatest strengths.**

The truth is also that in order to come out of this disruption in a positive way for the future, we will need **people** - people with the **passion** and the **stamina** to stay with it. People who have a deep commitment to creating a **climate just world** and the belief that we **can** create change at scale, even in the darkest moments. People ready to fight for what we know is right and not give up.

That is where **we** all come in but particularly the **students and young leaders** of today are so very important, and I am sure I am looking at many of those people here this evening.

**Determination, knowledge, respect and collaboration.**

Let's get to work.

Thank you.