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STARECOWATCH, MONDAY 19 JANUARY 2026

The battle over the global energy transition

It's shaping up to be a petro states vs electro states year in energy use.

By JENNIFER MORGAN

TWO years ago, countries around the world set a goal of "transitioning away from fossil fuels in energy systems in a just, orderly, and equitable manner". The plan included tripling renewable energy capacity and doubling energy efficiency gains by 2030 – important steps for slowing climate change since the energy sector makes up about 75% of the global carbon dioxide emissions that are heating up the planet.

The world is making progress: More than 90% of new power capacity added in 2024 came from renewable energy sources, and 2025 saw similar growth.

However, fossil fuel production is also still expanding. And the United States, the world's leading producer of both oil and natural gas, is now aggressively pressuring countries to keep buying and burning fossil fuels.

The energy transition was not meant to be a main topic when world leaders and negotiators met at the November 2025 United Nations climate summit, COP30, in Belém, Brazil. But it took centre stage from start to finish, bringing attention to the geopolitical energy debate and the stakes at hand.

Brazilian President Luiz Inácio Lula da Silva began the conference by calling for the creation of a formal road map, essentially a strategic process in which countries could participate to "overcome dependence on fossil fuels". It would take the global decision to transition away from fossil fuels from words to action.

More than 80 countries said they supported the idea, ranging from vulnerable small island nations like Vanuatu that are losing land and lives from sea level rise and more intense storms, to countries like Kenya that see business opportunities in clean energy, to Australia, a large fossil-fuel-producing country.

Opposition, led by the Arab Group's oil- and gas-producing countries, kept any mention of a "road map" energy transition plan out of the final agreement from the climate conference, but supporters are pushing ahead.

I was in Belém for COP30, and I follow developments closely as a former special climate envoy and head of delegation for Germany and senior Fellow at the Fletcher School at Tufts University, United States.

The fight over whether there should even be a road map shows how much countries that depend on fossil fuels are working to slow down the transition, and how others are positioning themselves to benefit from the growth of renewables. And it is a key area to watch in 2026.

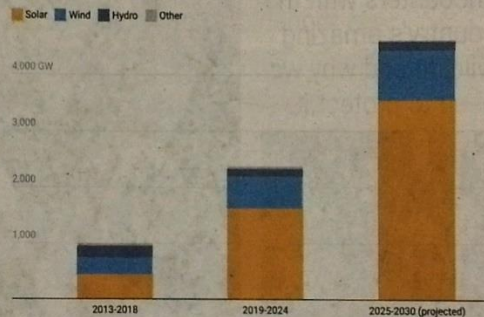
Electro states vs petro states

Brazilian diplomat and COP30 president André Aranha Corrêa do Lago has committed to lead an effort in 2026 to create two road maps: one on halting and reversing deforestation and another on transitioning away from fossil fuels in energy systems in a just, orderly, and equitable manner.

What those road maps will look like is still unclear. They are

Global renewable energy growth is accelerating

The International Energy Agency expects renewable energy to grow much faster in 2025-2030 than in the previous five years.



In gigawatts
Chart: The Conversation, CO-BY-ND • Source: IEA • Created with Datawrapper

likely to be centred on a process for countries to discuss and debate how to reverse deforestation and phase out fossil fuels.

Over the coming months, Corrêa plans to convene high-level meetings among global leaders, including fossil fuel producers and consumers, international organisations, industries, workers, scholars, and advocacy groups.

For the energy road map to both be accepted and useful, the process will need to address the global market issues of supply and demand, as well as equity. For example, in some fossil fuel-producing countries, oil, gas, or coal revenues are the main source of income. What can the road ahead look like for those countries that will need to diversify their economies?

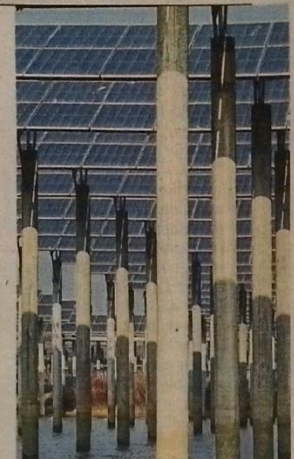
Nigeria is an interesting case study for weighing that question. Oil exports consistently provide the bulk of Nigeria's revenue, accounting for around 80% to

over 90% of total government revenue and foreign exchange earnings. At the same time, roughly 39% of Nigeria's population has no access to electricity, which is the highest proportion of people without electricity of any nation. And Nigeria possesses abundant renewable energy resources across the country, which are largely untapped: solar, hydro, geothermal, and wind, all providing new opportunities.

A possible road map

In Belém, representatives talked about creating a road map that would be science-based and aligned with the 2015 Paris Climate Agreement, and would include various pathways to achieve a just transition for fossil-fuel-dependent regions.

Some inspiration for helping fossil-fuel-producing countries transition to cleaner energy could come from Brazil and Norway.



In Brazil, Lula (as the president is known) has asked his ministries to prepare guidelines for developing a road map for gradually reducing Brazil's dependency on fossil fuels and finding a way to financially support the changes.

His decree specifically mentions creating an energy transition fund, which could be supported by government revenues from oil and gas exploration. While Brazil supports moving away from fossil fuels, it is also still a large oil producer and recently approved new exploratory drilling near the mouth of the Amazon River.

Norway, a major oil and gas producer, is establishing a formal transition commission to study and plan its economy's shift away from fossil fuels, particularly focusing on how the workforce and the natural resources of Norway can be used more effectively to create new and different jobs.

Both countries are just getting started, but their work could help point the way for other countries and inform a global road map process.

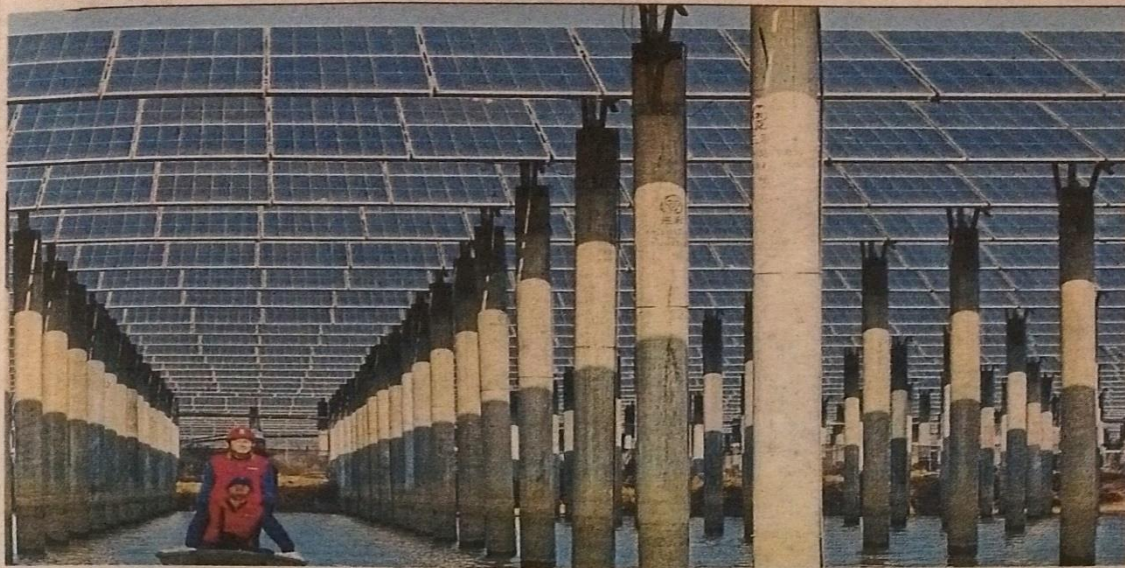
The European Union has implemented a series of policies and laws aimed at reducing fossil fuel demand. It has a target for 42.5% of its energy to come from renewable sources by 2030. And its EU Emissions Trading System, which



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Workers checking solar panels installed on a lake in Tianchang, in east China's Anhui Province on Jan 12. Solar power has been expanding quickly, and natural gas is also booming, says the International Energy Agency. — AFP

steadily reduces the emissions that companies can emit, will soon be expanded to cover housing and transportation. The Emissions Trading System already includes power generation, energy-intensive industry, and civil aviation.

Expected growth

In the United States, President Donald Trump's administration has made clear through its policy-making and diplomacy that it is pursuing the opposite approach: to keep fossil fuels as the main energy source for decades to come.

However, the International Energy Agency (IEA) still expects to see renewable energy grow faster than any other major energy source in all scenarios going forward, as renewable energy's lower costs make it attractive in many countries. Globally, the agency expects investment in renewable energy in 2026 to be twice that of fossil fuels.

At the same time, however, fossil fuel investments are also rising with fast-growing energy demand.

The IEA's World Energy Outlook described a surge in new funding for liquefied natural gas

(LNG) projects in 2025. It now expects a 50% increase in global LNG supply by 2030, about half of that from the United States. However, the World Energy Outlook notes that "questions still linger about where all the new LNG will go" once it's produced.

What to watch for

The Belém road map dialogue and how it balances countries' needs will reflect on the world's ability to handle climate change.

Corrêa plans to report on its progress at the next annual UN climate conference, COP31, in late 2026. The conference will be hosted by Turkey, but Australia, which supported the call for a road map, will be leading the negotiations.

With more time to discuss and prepare, COP31 may just bring a concrete transition away from fossil fuels back into the global negotiations. — The Conversation

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