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BLOG POST July 2nd 2026

# Beyond the heat: what Bonn and London reveal about the next phase of climate action

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Reading time: 8 min

**The climate conversation has become trapped between two competing narratives. On the one hand, a growing chorus argues that the transition is now unstoppable: renewable energy deployment continues to accelerate, clean energy investment has overtaken fossil fuel investment, and electrification is gaining momentum across sectors. On the other hand, geopolitical tensions, weak multilateral cooperation and growing political backlash fuel a sense of pessimism about the prospects for the required collective and coordinated climate action. Neither narrative fully captures reality. This blog post describes how these narratives unfolded in Bonn and London over the past weeks and analyzes what they imply for the near future.**

The Bonn negotiations' milestone (SB64) and the London Climate Action Week—the two most recent international multi-stakeholder climate gatherings ahead of COP31—offered a useful snapshot of the current moment of climate diplomacy. Across negotiation rooms, side events and informal discussions, a common picture emerged: major transformations are underway, but they are unfolding in an increasingly contested and fragmented environment.

The defining challenge of this decade may no longer be generating new climate commitments and rallying to get countries' endorsement. It may instead be learning to navigate a transition that is simultaneously accelerating, geopoliticizing and becoming more politically contentious.

### Signals of acceleration

Despite political uncertainty, several signals suggest that key elements of the transition continue to gain momentum.

Electrification is one of the clearest examples. The COP31 Presidency has made it a flagship priority and the London Climate Action Week saw the launch of the *Electrify Now* initiative. Electrification is increasingly viewed as a central pathway to decarbonization, while also supporting energy security, affordability and competitiveness—all national objectives exposed by the Ormuz crisis.

This reflects deeper structural trends. According to the IEA, global investment in clean energy technologies now significantly exceeds investment in fossil fuels. Renewable deployment continues to grow rapidly and 2025 has become the first year in which a RE-based technology—solar PV in this case—becomes the world's largest source of new power capacity additions. IRENA speaks about the need to electrify demand alongside supply, in sectors like transport, buildings and industry to enable the transition away from fossil fuels.

Yet important blind spots remain. Fossil fuel subsidies continue to distort markets and public spending decisions, while efforts to improve their transparency and phasing-out have stalled in major economies—the agenda has disappeared from G7 and G20 where it had been discussed since 2009. Moreover, the electrification agenda does not automatically address the persistent challenge of energy access. For many developing countries, expanding electricity access requires substantial investments not only in generation but also in grids, storage and distribution systems, at a time when public development finance is under growing pressure.

A second signal of acceleration concerns the evolution of the climate regime itself. "Implementation" has become the dominant framing across climate diplomacy. In Bonn, this language appeared across virtually every negotiating track. There were numerous discussions—formal and informal—on how to continue reforming the climate regime to be most effective in delivery. Within the formal negotiations, the focus on implementation naturally led to discussions on finance, but not in the traditional reference to means of implementation. The climate finance discussions appear to be slowly shifting from headline pledges towards more concrete reforms to improve access to finance and mobilize investment, however showing persistent political divides and growing frustration among developing countries over the lack of tangible delivery and general concern on whether we have the right people around the table for such discussion to deliver. Access to finance emerged as a recurring theme that is likely to shape preparations for COP31, especially in relation to adaptation and the needs of Small Island Developing States and Least Developed Countries.

Yet an important paradox emerged. While implementation featured prominently in political discourse, existing UNFCCC processes specifically designed to learn from implementation and feed back the process attracted comparatively limited attention. This is the case of the Facilitative Multilateral Consideration of Progress (FMCP), where 37 Parties—representing half of global emissions—presented their progress toward NDC achievement, or the Annual GST Dialogue. This suggests a growing gap between the political narrative of implementation and the existence of a shared understanding of the effective opportunities and limitations to support it from within the UNFCCC, given the differing understandings of what "implementation" entails (IDDRI, 2025a) that emerged during last year's discussions. Discussions on the Global Climate Action Agenda were more vibrant, offering a clear vehicle to link the outcomes of the negotiations, such as the Global Stocktake, and the efforts led by non-state Parties and Parties alike outside the formal process.

Another increasingly visible sign that climate change is entering economic reality is the growing debate around insurability, prominent in London. The rising cost and  growing insurability gaps for climate-exposed assets and communities is forcing climate risks into economic and financial decision-making, as illustrated by the prominence of the topic in the finance track of both the last G20 (under South Africa Presidency, cf. IDDRI, 2025b) and the current G7 (IDDRI, 2026). The question is no longer whether climate impacts will affect economies, but how governments, businesses and citizens will manage risks that are already materializing. Whereas this is the end-tail of the adaptation story, it sparks some action and reflection on the effectiveness of adaptation measures, which the technical work on indicators to measure progress towards the adaptation goal is struggling to deliver.

### Climate action is becoming (even more) geopolitical

Both Bonn and London also underscored a second reality: climate action and geopolitics are increasingly inseparable. The assumption that clean energy systems would reduce geopolitical tensions is giving way to a more nuanced reality. The transition may not eliminate geopolitics; it potentially reshapes it.

The first UNFCCC dialogue on climate and trade attracted significant attention, but also exposed deep tensions around carbon border measures, industrial competitiveness and development opportunities. Debates remained highly politically charged, often reflecting deeper North-South disagreements about responsibility, fairness and development opportunities. Climate and trade are no longer separate conversations—the question remains on where this will be effectively addressed.

London echoed many of these debates through discussions on critical minerals. China's recent regulatory changes, growing export restrictions and G7 efforts to reduce strategic dependencies (IDDRI, 2026) illustrate how governments are seeking greater control over resources considered essential for the energy transition.

Participants from countries such as India and Brazil and mineral-rich producing economies repeatedly raised concerns about whether clean energy technologies will support new development opportunities or reproduce familiar patterns of resource dependency, environmental degradation and unequal value capture. The risk is not only that the transition becomes more geopolitical, but that it replicates some of the inequalities associated with the fossil fuel economy.

### Why confidence is declining

Despite evidence of accelerating action, many participants left Bonn and London with a contradictory feeling: more activity, but less confidence.

Negotiations in Bonn proceeded smoothly from a procedural perspective, covering a huge amount, but connection with reality and political momentum often appeared limited. Concerns about fragmentation, reduced participation and the effectiveness of multilateral processes contributed to a broader sense of loss of purpose. This raises a question to the climate ecosystem: what is the one thing we cannot afford to lose in this process?

The lower visibility of major actors such as India in Bonn and China in London reflected this trend. This does not imply reduced domestic climate action, but rather that geopolitical tensions over perceived imbalances generated by a number of big countries' development models and the proliferation of smaller cooperation formats are increasingly shaping international engagement.

Another source of concern is the growing spread of misinformation and disinformation. As climate policies affect industries, investments and lifestyles more directly, they are becoming entangled in wider political and cultural conflicts. Climate impacts are becoming more visible through heatwaves and extreme events, yet consensus around solutions is becoming harder to sustain. Trust in institutions, expertise and public decision-making is under pressure. Hence under the banner of 'Friends of Science', a coalition of some rich nations and the world's most vulnerable vowed in Bonn to protect climate science in UN negotiations.

## Complexity is not failure

The multiplicity of debates unfolding across climate diplomacy can create the impression that the transition is losing direction. The opposite may be true.

Climate policy now sits at the intersection of economic policy, industrial strategy, development, trade and security. Debates over renewables *versus* nuclear power, climate *versus* competitiveness, or trade *versus* cooperation reflect the fact that climate action has become a mainstream political and economic issue.

The discussions around equitable transitions away from fossil fuels provides a useful illustration. COP30 Presidency held consultations on the Roadmap to transitioning away from fossil fuels across these two events, and in between, joining forces with the UK government for dedicated dialogues to better understand perspectives from fossil fuel producers. Experts also used these gatherings to share the latest research. The focus is on delineating different national circumstances, fossil fuel dependence and opportunities for flourishing post-fossil economies, so countries can position themselves in terms of transition readiness and for international cooperation to understand how to get better organized, including from a governance perspective. Diverse starting points and barriers do not amount to a rejection of a shared global objective, all the opposite, it opens avenues for more effective collaborations. Hence, attention now is turning towards national transition roadmaps, where these national circumstances can be explored, discussed domestically, and turned into enhanced capacity to plan, mobilize actors and attract the support that is needed. Countries have been loud though, this will not be a story of more plans, effective cooperation must be built on these.

For climate practitioners, the challenge is to distinguish noise from structural change and for climate diplomats to identify which collaborations are likely to shape their national paths. For all, the task is to remain pragmatic about the obstacles, clear-eyed about the tensions and where cooperation may deliver against their own needs and determined about the direction of travel established by the Paris Agreement. The path forward may be messier than many expected. But the direction of travel remains clear.

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