REPORT

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EU CLIMATE PARTNERSHIPS – FIT FOR PURPOSE?

A snapshot of EU international engagement in selected climate partnerships



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Disclaimer

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SUMMARY

The world has undergone significant changes since the start of the Von der Leyen Commission in 2019. The European Union (EU) faces shifting dynamics, marked by increasing assertiveness from global powers like China and Russia, supply chain disruptions, energy and economic security concerns, questions about the EU's competitive position in the global economy, all in the backdrop of rising temperatures. This has necessitated a recalibration of the EU's geopolitical strategy, and a new innovative approach to EU climate diplomacy centred on climate partnerships.

Over the last few years, the EU launched various types of what can loosely be defined as climate partnerships. Largely seen as the EU's response to China's Belt and Road Initiative, Global Gateway is a geopolitical tool to support infrastructure development in emerging economies and developing countries, with an emphasis on the green and digital transition. Global Gateway comes in addition to bilateral initiatives such as Green Partnerships, Green Alliances, Critical Raw Materials Strategic Partnerships, as well as plurilateral programmes like the Just Energy Transition Partnerships, all to strengthen the EU's influence in the world and bolster EU climate diplomacy efforts. In addition to these EU-led partnerships, EU Member States also have a wide range of bilateral climate and development partnerships with third countries. The self-declared goal of the Team Europe approach is for all of these partnerships collectively to achieve more than the sum of their individual parts.

However, the EU's Global Gateway initiative as well as its wider partnership frameworks face significant challenges in articulating a coherent vision, both within its own institutions and in coordination with Member States. The initiative's lack of clarity is also evident in diplomatic interactions with partner countries through its delegations and internal inconsistencies among different Directorates-General, leading to fragmented communication and prioritisation. The absence of prioritisation and focus on key regions raises concerns regarding the effectiveness and capacity constraints of EU institutions. Addressing these institutional and coordination challenges is crucial for the EU to realise its ambitions for Global Gateway and EU climate partnerships overall. To effectively deliver on the goals of climate partnerships, the EU can do the following:

- **Align EU and Member State priorities for enhanced cooperation:** The priorities of Member States and the EU should align strategically to leverage the potential of Team Europe. Deeper coordination is required to enhance visibility, coherence, and synergy among European players in climate partnerships.
- **Provide more clarity in partnership communication:** The EU's partnership offer needs clearer communication to ensure effective implementation. This can be done by crafting concise messages that convey the goals, benefits and objectives of EU climate partnerships to stakeholders. Additionally, committing to a communication campaign in local languages can resonate with the wider public.
- **Develop a long-term strategic vision:** A shared, long-term strategic vision involving both the EU and Member States is necessary for holistic climate partnerships. Committing to a long-term strategic vision will also strengthen credibility between the EU and partner countries, showing the longevity of the partnership.
- **Establish clarity in responsibilities and increased resources:** Clear delineation of roles and increased resources are crucial for stronger climate partnerships. Key EU institutions require diverse expertise and sufficient resources for effective implementation.
- **Deliver political leadership and gain buy-in:** Strong political buy-in at the highest level is critical for ensuring sufficient resources, effective coordination and implementation. Only with sustained commitment and visibility on the ground can climate partnerships truly thrive and make a meaningful impact.

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ABBREVIATIONS

BMWK	German Federal Ministry for Economic Affairs and Climate Action
BMZ	German Federal Ministry for Economic Cooperation and Development
CBAM	Carbon Border Adjustment Mechanism
CRMs	Critical Raw Materials
CRMA	Critical Raw Materials Act
COP	Conference of the Parties
DFI	Development Finance Institution
DG	Directorate-General
DG CLIMA	Directorate-General for Climate Action
DG GROW	Directorate-General for Internal Market, Industry, Entrepreneurship and Small & Medium Enterprises
DG INTPA	Directorate-General for International Partnerships
EEAS	European External Action Service
EIB	European Investment Bank
ESG	Environmental, Social, and Governance
EU	European Union
EUR	Euros (currency)
FAC	Foreign Affairs Council
G7	Group of Seven
G20	Group of Twenty
GFANZ	Glasgow Financial Alliance for Net Zero
HR/VP	High Representative of the Union for Foreign Affairs and Security Policy
IEA	International Energy Agency
IPG	International Partners Group
IRA	Inflation Reduction Act
JETP	Just Energy Transition Partnership
LAC	Latin America and the Caribbean
MIP	Multiannual Indicative Plan
MoU	Memorandum of Understanding
OECD	Organisation for Economic Co-operation and Development
P+	Climate and development partnerships launched by the German Federal Ministry for Economic Cooperation and Development
RE	Renewable Energy
SDG	Sustainable Development Goal
TEI	Team Europe Initiative
UNFCCC	United Nations Framework Convention on Climate Change
USD	U.S. Dollars (currency)

/\ 01 INTRODUCTION

The European Union is at a critical crossroad in its climate diplomacy, energy security, foreign policy and relations with developing countries and emerging economies, as it aims to continue its international leadership on climate action. Facing a complex geopolitical landscape, the EU is forced to rethink its role in the world and, more critically, its relationship with international partners and diplomatic efforts. Against the backdrop of supply chain disruptions, heightened anxieties over Europe's competitive position, and a declining trust in the multilateral system, the EU is confronting a number of challenges. With the EU emitting only 8% of global emissions today but being responsible for high emissions in the past, it will be necessary for the EU to support partner countries in decarbonising their economies to keep global warming to 1.5°C (Council of the European Union, 2024a). The EU has increasingly turned to integrating climate partnerships, including a financial offer, in its climate diplomacy efforts to build relationships with third countries, while also aiming to secure supply chains for critical raw materials and clean energy. Additionally, the European Green Deal, the EU's policy plan to reach climate neutrality, is expected to have wide-ranging impacts on partner countries, especially with the introduction of the Carbon Border Adjustment Mechanism (CBAM). Given the external dimension of the EU Green Deal, it will be even more important for the EU to foster partnerships with countries affected by EU Green Deal policies.

Financial resources provide a crucial foundation for implementing the EU's climate diplomacy, enabling the EU to assist developing and emerging countries in implementing the green transition through various partnership models. The EU and its Member States are affirming their commitment to take a leading role in the global transition, notably through their contribution to international climate financing, which has doubled since 2013. In 2022, they provided over EUR 28 billion in funding for developing countries, which are typically characterised by a growing economy and an increasing consuming population (European Commission, 2019). While this makes the EU the largest net contributor to international public climate finance, experts argue that their contributions fall short of what is considered a fair share (Climate Action Tracker, 2024; Council of the European Union, 2024b). However, financial support is only a part of the puzzle. To be a key partner for other countries, an integrated approach to partnerships that considers geopolitics is necessary.

European Commission President Von der Leyen's "geopolitical Commission" made strengthening the EU's position and influence on the global stage a political priority for the EU (European Parliament, 2020). This objective was outlined in the Commission's priority pillar "A Stronger Europe in the World", alongside five other pillars such as the EU Green Deal, and included launching strategic climate partnerships as a key objective and core area of the EU's climate diplomacy. Von der Leyen's Commission is credited with helping to change the narrative on partnerships by moving away from the "donor-recipient relationship" to "partnerships of equals"

between the EU and third countries (Roba, 2021). This shift transformed the EU's climate diplomacy efforts, developing relationships on a more equal footing (Roba, 2021). Even the renaming from DG DEVCO (Cooperation and Development) to DG INTPA (International Partnerships) has contributed to this paradigm change. For the last few years, the Foreign Affairs Council conclusions on green diplomacy have reaffirmed the EU's commitment to partnering with various regions and stakeholders to advance the global green transition. Most recently in March 2024, the conclusions highlighted initiatives like Green Alliances, Green Partnerships, Just Energy Transition Partnerships, and Global Gateway (Council of the European Union, 2024c).

Looking at the 2019-2024 Commission, this research delves into the diverse array of initiatives broadly categorised as climate partnerships, examining their consistency, coherence, and coordination of their activities. It also offers insights into the challenges encountered by the EU and its Member States. This is the first briefing in a two-part series, with the second focusing on recommendations for effective climate partnerships for the EU to implement with partners. For this research, NewClimate Institute conducted a series of expert interviews with government representatives from selected EU Member States, representatives from EU institutions, and civil society organisations. These interviews are supported by extensive literature research, both at a global level and for the selected countries and partnership themes - hydrogen, renewable energy and critical raw materials.

The briefing is structured as follows: The first section maps existing climate partnerships and assesses the geographical prioritisation of the most prominent EU climate partnership frameworks. The next section provides a closer look into the coherence and consistency of partnerships through country case studies of selected themes. The last section includes key takeaways drawn from the case studies, interviews and literature review.

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2.1 MAPPING EU INTERNATIONAL CLIMATE PARTNERSHIPS

The EU is engaged in several types of climate partnerships, including Global Gateway, Green Partnerships, Green Alliances, Just Energy Transition Partnerships (JETPs), as well as Strategic Partnerships on Critical Raw Materials. Each partnership has its own characteristics, priorities, structures, and goals – whether in terms of content or geographical focus – and are at varying stages of development.

GLOBAL GATEWAY

Global Gateway is the EU's geopolitical strategy that aims to offer support to developing countries and emerging economies for mobilising investments in infrastructure. It can be understood as an alternative to China's Belt and Road Initiative as the EU seeks to bolster its strategic position and promote its values and interests on the global stage, as well as shore up alliances with countries. It includes projects on infrastructure development, digital connectivity, and climate and renewable energy that can vary in size and investment flows. The Commission maintains that Global Gateway will mobilise up to EUR 300 billion up until 2027 (European Commission, 2024). In many cases, the EU, Member States and their public development banks pool resources and expertise from existing **Team Europe Initiatives** and rebrand them as Global Gateway projects.

GREEN PARTNERSHIPS & GREEN ALLIANCES

In parallel to Global Gateway, the EU announced **Green Partnerships** and **Green Alliances** over the last several years with selected countries as a comprehensive form of bilateral engagement established under the European Green Deal. Green Alliances are agreements in which both parties are committed to climate neutrality and "aligning their domestic and international climate policies" to reach this goal (European Commission, 2023b). Green Partnerships do not mention a commitment to climate neutrality or alignment on policies but rather emphasise dialogue and cooperation on the green transition (European Commission, 2023c). The EU signed agreements establishing a Green Alliance with only developed countries, while Green Partnerships have been signed with both developed and developing countries. In the EU's communication, clear differences are not explained between the two types of agreements beyond the commitment to climate neutrality and alignment on domestic and international climate policies.

JUST ENERGY TRANSITION PARTNERSHIPS

The **Just Energy Transition Partnership (JETP)** is a flagship plurilateral partnership model aimed at accelerating a just energy transition in coal-dependent emerging economies. The partnership's public funding pool draws from the International Partners Group (IPG), which includes G7 countries like the US, Japan, and the UK, as well as the EU and some of its Member States such as Germany, France, Canada, Italy, Norway, and Denmark. The partnerships also work with multilateral and national development banks, as well as private financial institutions in the Glasgow Financial Alliance for Net Zero (GFANZ). South Africa, Vietnam, Indonesia, and Senegal are among the first recipient countries to have secured agreements under this partnership model.

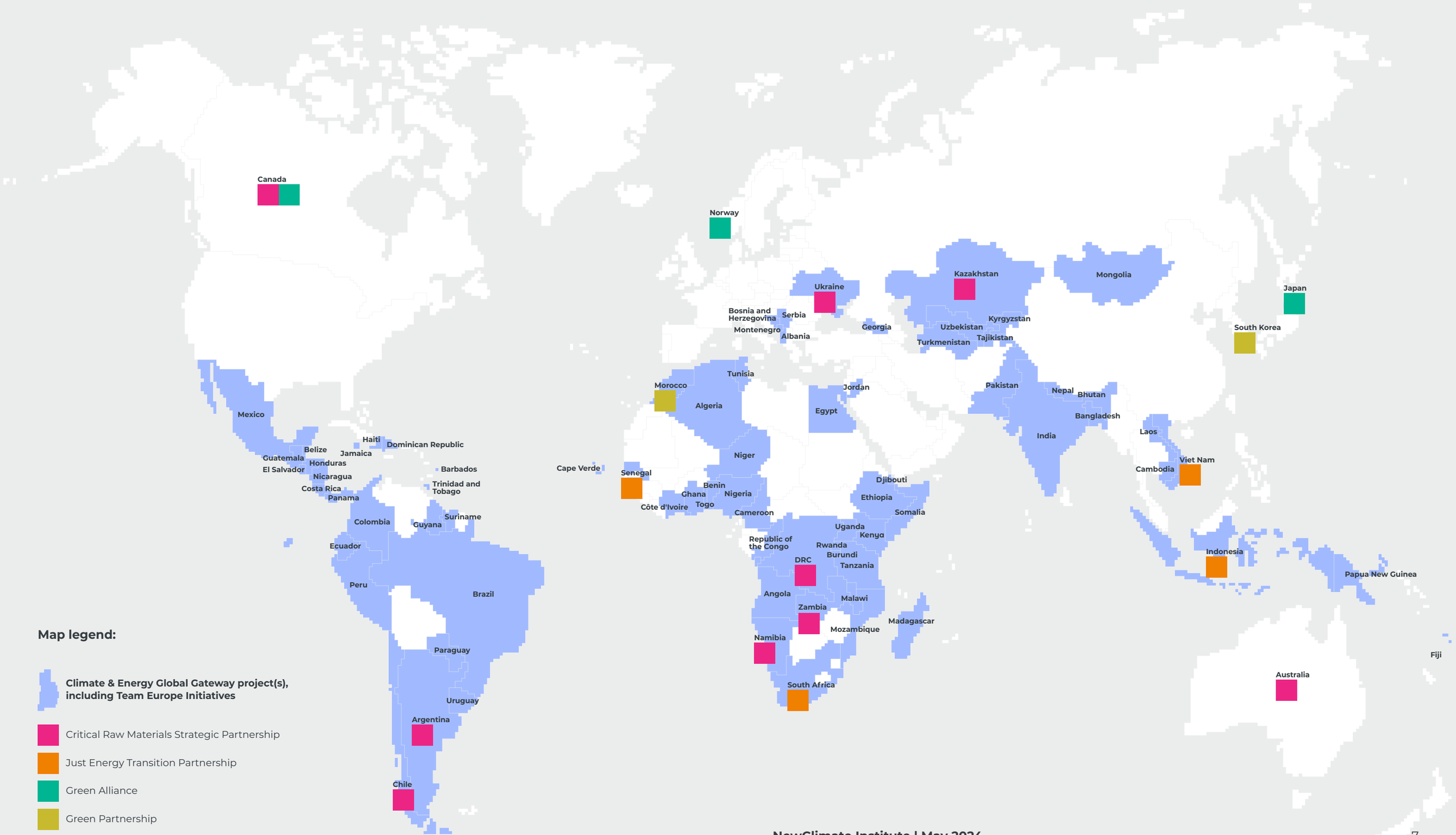
STRATEGIC PARTNERSHIPS ON CRITICAL RAW MATERIALS

Strategic Partnerships on Critical Raw Materials are an instrument for the EU to diversify supply chains of critical raw materials to mitigate geopolitical risks and ensure resilience (European Parliament, 2023). Critical raw materials are indispensable for driving the energy transition, serving as key components of renewable energy technologies such as solar panels, wind turbines and batteries. However, securing access to critical raw materials comes with extensive challenges, as mining, processing, refining and exporting are concentrated in only a handful of countries. With these partnerships, the EU aims to provide a mutually beneficial offer to selected countries that adhere to high environmental and production standards for mining and processing. Partnerships include commitments on knowledge and technology transfer, training and upskilling.

MAPPING EU CLIMATE PARTNERSHIPS

Geographical distribution of selected EU climate partnerships

This map shows the global reach of EU climate partnerships under the Climate & Energy Global Gateway framework, including Team Europe Initiatives, as well as Critical Raw Materials Strategic Partnerships, Just Energy Transition Partnerships, Green Alliances, and Green Partnerships, revealing the wide scope of the EU's involvement in climate-related initiatives.



Map legend:

- **Climate & Energy Global Gateway project(s), including Team Europe Initiatives**
- Critical Raw Materials Strategic Partnership
- Just Energy Transition Partnership
- Green Alliance
- Green Partnership

→ **The map** presents an overview of selected EU climate partnerships, displaying the distribution of Global Gateway projects on climate and energy worldwide. It includes Team Europe Initiatives, along with the geographical breakdown of Green Partnerships, Green Alliances, the JETPs and Critical Raw Materials Strategic Partnerships. While the global overview of initiatives may give the impression that the EU is equally involved in all countries displayed, it should be noted that Global Gateway projects often include pre-existing Team Europe Initiatives that vary in size and investments committed. Meanwhile, Green Alliances were recently established with developed countries that the EU already has close relations with: Canada, Norway and Japan. The two Green Partnerships established are with Morocco and South Korea, encompassing both developed and developing countries.

The global overview reveals a dispersed approach, with Global Gateway projects spanning multiple countries. The absence of prioritisation and focus on key regions raises concerns regarding effectiveness, given the limited resources and stretched capacities of EU officials. Despite the broad presence indicated, differences in partnership types and geographical coverage suggest a need for clearer strategic direction and differentiation in engaging with various countries and regions.

2.2. ASSESSING THE EU'S INTERNATIONAL CLIMATE ENGAGEMENT

Global Gateway: An unclear offer from the EU

The EU is experiencing challenges in developing a clear vision and offer for Global Gateway, as illustrated by this remark from a diplomat in a partner country - "China gives us an offer we can't refuse, [while] the EU gives an offer we can't understand." Interviews with stakeholders and officials highlighted that the EU is struggling to adopt a common vision for Global Gateway across the different DGs. DG INTPA regularly mentions Global Gateway in all documents, but some DGs like DG CLIMA do not consistently emphasise Global Gateway programmes across all interservice documents that deal with the external dimension. This lack of coherence and clarity is also visible in direct communication with partner countries via EU delegations. Similarly, on the Member State level, Global Gateway is not consistently emphasised in investment programmes. As an example, Germany recently hosted a meeting for the G20 Compact with Africa Conference and did not clearly mention Global Gateway investments in the materials, showing the lack of clear vision for Global Gateway from a Member State perspective (Teevan and Bilal, 2023).

Within the Commission itself, Global Gateway has been perceived as a rebranding of existing programmes. It has faced criticisms for lacking fresh money and having too many flagship initiatives that encompass a large variety of projects, varying

in size, types, investment volumes, content and geographical coverage. Seen by stakeholders as "everything and nothing", Global Gateway entails important aspects of climate partnerships but remains an unclear offer to partner countries.

Adding to that, the lack of clarity regarding which climate partnerships fall within the scope of Global Gateway adds to the ambiguity in the European Commission's communications. While JETPs are considered part of the Global Gateway strategy in many of the Commission's documents, Green Alliances and Green Partnerships appear to be treated separately. For Global Gateway to effectively streamline the framework for EU external action, it is important for the European Commission to provide clear definitions of its scope, priorities, and objectives.

Lack of EU-Member State coordination

The Commission often has limited coordination mechanisms with Member States on bilateral partnerships in countries where the EU is establishing its own climate partnerships, such as Green Partnerships or Green Alliances. Bilateral relations are the backbone of Member States' development cooperation with partner countries, especially on climate issues. Collaboration is even more relevant when Member States and third countries share a common interest on a topic. Some Member States representatives have expressed concerns in interviews about the absence of an overview of the EU's strategy on Green Partnerships, indicating a risk of missed opportunities for coordination and communication between the EU and Member States on bilateral partnerships.

The Foreign Affairs Council Conclusions on Green Diplomacy, i.e. the European Council's strategy for climate diplomacy, call for coordination and information exchange between the EU and Member States on partnerships through a Team Europe approach. However, cooperation has proven challenging. Some of the most ambitious Member States on climate diplomacy have voiced concerns that the EU may be missing opportunities to work together on climate partnerships led by Member States themselves. One positive example of effective coordination mentioned by interviewees is the Just Energy Transition Partnerships, particularly the regular follow-up meetings between IPG countries, addressing not only the technical details but also political outreach. Coordination seems to have improved between the EU and Member States when the EU co-leads the JETP, as seen in Vietnam. This setting facilitated regular information meetings with all EU Member States on the advancement of the JETP, even those not directly involved.

Challenges arising from the EU's institutional set-up regarding climate partnerships

Research and interviews with stakeholders reveal that the fragmentation of the EU's main external action bodies poses several challenges to coherence in international climate partnerships.

At the headquarters level

- **Fragmentation of EU institutions**

  EU officials based in Brussels report a lack of communication channels between DGs and the EEAS in Brussels. While DG CLIMA holds expertise in climate matters, it is DG INTPA that oversees development policies and manages financial resources. When a new partnership is deemed politically important by high-ranking political officials in Brussels, financial resources are often redirected from DG INTPA's budget to establish these partnerships. This reshuffling sometimes results in less financial support for other projects as DG INTPA is forced to compensate for the funds reallocated to the newly launched partnerships. As a result, this reallocation, often initiated by high-level political figures, can hinder the credibility and consistency of the EU's external action, as DGs may find themselves scrambling to secure other funding sources for projects.

- **Short-term nature of political announcements**

  Partnerships are announced by high-level officials during politically opportune moments, such as diplomatic visits or multilateral summits like the G7, G20 or COP. For example, German Chancellor Olaf Scholz supported the JETP with Senegal when the African country was invited to join the G7 Summit under the German presidency in 2022. However, in some cases, the short-term nature of such a political announcement may mean that key aspects like the financing mechanism or consultation with civil society are not adequately addressed when outlining the partnership, which could potentially undermine coherence in the EU's international partnerships.

At the delegation level

- **Internal division among EU institutions**

  The internal division among EU institutions poses a challenge to delegations on the ground in partner countries during implementation. Staff in delegations can work under the responsibility of the EEAS when their position is political or under different DGs depending on their field of expertise. Consequently, civil servants from different DGs contribute

their expertise to assist the delegations with specific tasks (e.g., DG TAXUD supports discussions on CBAM). However, this diversity can pose clear barriers to internal coordination, given that each staff responds to the priorities of their host DG, sometimes making it difficult for the delegation on the ground to maintain a unified stance and to share information with headquarters in Brussels.

→ **Limited staff dedicated to climate partnerships**

EU officials report that a lack of staff dedicated solely to climate topics and partnerships can be an obstacle to internal coordination within the EU. To address this in the JETP context, the EU delegation in Indonesia, for example, designated a staffer to be the focal point for the internal coordination with the Commission, the EEAS, the EIB and other actors, as well as Member States on the working level within the IPG. Now all delegations in countries with a JETP have a mandate to establish a focal point to handle the coordination of the JETP. However, staff in the delegations are often assigned additional topics in their portfolio, which can limit their time and resources available for internal coordination related to climate partnerships.

→ **Competing priorities in EU delegations**

There seems to be limited guidance from Brussels on how to prioritise climate issues in the local working agenda of the delegation. With several competing priorities for EU delegations to tackle, there's a risk climate gets left off the agenda, unless headquarters provides guidance that climate partnerships remain a key priority for delegations. Active engagement and strong leadership from EU delegations are also critical for effective partnership execution. The head of the delegation plays a crucial role in implementing the EU's priorities, as well as engaging in diplomatic negotiations, dialogues and stakeholder and political outreach. Whether climate is considered a priority in a delegation largely depends on the head of the delegation or individual senior staff members. Brussels can ensure climate is prioritised by providing guidance and incentives to streamline and promote delegations' engagement in climate action.

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THE EU'S CLIMATE ENGAGEMENT IN SELECTED COUNTRIES

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3.2 Insights from Country Case Studies 22

The following country case studies offer insights into coordination, consistency and coherence challenges across different themes and partnerships. Green hydrogen, critical raw materials, and renewable energy were selected as focus topics, given their importance for the EU and the global transition. Each case study assesses challenges in climate partnerships among the EU and its Member States and partner countries particularly relevant to the examined topics.

3.1 COUNTRY CASE STUDIES: EXPLORING EU GLOBAL CLIMATE INITIATIVES

THE EU'S HYDROGEN GLOBAL GATEWAY STRATEGY IN BRAZIL & CHILE

The term "green hydrogen" is used in this report to refer to the production of hydrogen from renewable energy sources. If the production of hydrogen is to be powered by renewable and/or low-carbon energy sources such as nuclear power, the authors refer to it as "clean hydrogen", based on the terminology used by the European Union in its 2020 Strategy on Hydrogen (European Commission, 2020).

Latin America is a region of heightened focus in the Global Gateway framework, especially on green hydrogen. Through the EU-LAC (Latin America and the Caribbean) Global Gateway Investment Agenda, the EU and Member States, in a joint Team Europe approach, announced the allocation of EUR 45 billion until 2027 to reinforce the ties of the EU to the LAC region (European Commission, 2023a). Two countries that are key partners of the EU and EU Member States on green hydrogen in Latin America are Chile and Brazil.

Motivations behind partnerships on the development of green and clean hydrogen

With its 2020 Strategy on Hydrogen, the EU enshrined its vision on the development of clean hydrogen as a key driver of the energy transition. In line with its Global Gateway strategy, the EU seeks to enhance cooperation with strategic countries to develop their clean hydrogen industries and create new export routes for hydrogen. The EU's objective is to produce 10 million tonnes and import 10 million tonnes of clean hydrogen annually by 2030 (European Commission, 2020). Brazil and Chile both emerged as important focal points to European countries due to their abundant renewable resources and their potential to power the production of green hydrogen at relatively lower costs, as well as for their strategic positions on the Latin American maritime front.

On the partner countries side, establishing partnerships with the EU and its Member States typically facilitates the expansion of their national hydrogen production further. In the case of Brazil and Chile, such partnerships could create maritime trade routes to export their domestically produced hydrogen to Europe.

The underlying challenge lies in ensuring the partnerships are mutually beneficial and do not perpetuate extractive practices at the expense of the exporting partner countries. Cooperation between developed countries and emerging

economies should steer opportunities for sustainable development and domestic decarbonisation in countries with extensive renewable resources, rather than exacerbating global inequalities (Fekete et al., 2023).

Key players and ongoing partnerships in Chile and Brazil

→ Chile

Among the flagship projects under the EU-LAC Global Gateway Investment Agenda, the EU Commission launched in 2023 its first Team Europe Initiative for the Development of Renewable Hydrogen (Delegation of the EU in Chile, 2024). This Team Europe Initiative aims to support and promote the transformation of the current Chilean mining industry into a low emitting energy industry revolving around renewable hydrogen production and exports. In addition to funding from the European Investment Bank (EIB) and German development bank KfW, this Team Europe Initiative is a joint effort with support from eleven Member States. The Team Europe Initiative has been established to support Chile's ambition to produce highly cost-effective hydrogen from renewable sources by 2030 and rank among the world's top three exporters by 2040 (Chilean Ministry of Energy, 2020). Industry-heavy EU Member States like the Netherlands and Germany have been most active in driving this joint Team Europe Initiative to support the development of a renewable hydrogen market in Chile (European External Action Service, 2023).

The Netherlands was a first mover in 2021, establishing a maritime corridor dedicated to green hydrogen between Chile and Europe through the port of Rotterdam (Chilean Government, 2021). This is aligned with the second phase of Chile's National Green Hydrogen Strategy, which aims at exporting green hydrogen globally (Chilean Ministry of Energy, 2020). This partnership is embedded in the Dutch government's strategy on hydrogen, which places significant emphasis on hydrogen logistics and transportation across Europe (Dutch Ministry of Economic Affairs and Climate Policy, 2020). An Agenda for Strategic Cooperation on Green Hydrogen was set for the period 2023-2025 to reinforce the collaboration between both governments. (Chilean Ministry of Energy and Dutch Ministry of Economic Affairs and Climate Policy, 2023)

Several other European ports and governments have pursued partnerships with Chile to strengthen the import-export routes for renewable hydrogen. The port of Hamburg stands among the key European stakeholders having signed agreements with the Chilean government (Chilean Ministry of Foreign Affairs, 2022). Germany is

indeed the leading European country in terms of hydrogen production capacity and has ambitious targets for green hydrogen imports, hence its special relationship with Chile: Chile is one of the target countries for international partnerships outlined in the 2020 German National Hydrogen Strategy (German Federal Ministry of Economic Affairs & Energy, 2020; European Hydrogen Observatory, 2023). In 2021, the Federal Ministry for Economic Affairs and Climate Action (BMWK) created a dedicated taskforce on green hydrogen within the 2019 Germany-Chile Energy Partnership, making it the first EU Member State to integrate green hydrogen in an overarching energy partnership with Chile (Energy Partnership Chile-Alemania, 2021).

→ Brazil

In 2023, the President of the Commission Von der Leyen pledged EUR 2 billion to Brazilian green hydrogen and energy efficiency, as part of a wider EUR 10 billion package for clean energy investments in Latin America through Global Gateway (Parkes, 2023). This commitment is ingrained within the EU's efforts to invest in the construction of Brazilian ports, thereby facilitating the export of hydrogen to global markets. A Global Gateway green and digital corridor linking the Brazilian port of Pecém with the Portuguese port of Sines was established in 2023, facilitating direct maritime routes for exporting green hydrogen to Southern Europe (Dokso, 2023). The EU aims to solidify its status as a crucial economically for Brazil, a country poised to be among the leaders in producing renewable hydrogen at a low cost, leveraging its abundant solar, wind and hydro resources (Hank et al., 2023).

While no overarching partnership solely dedicated to clean hydrogen has yet been established between Member States and Brazilian governments, the Netherlands has taken the lead through the development of infrastructure to export Brazilian renewable hydrogen to Europe. A bilateral agreement between the port of Rotterdam and the Brazilian port of Pecém was signed in May 2023 to further bolster their cooperation on renewable hydrogen and ensure a supply of hydrogen for Northern European countries (Port of Rotterdam, 2023a). The outcome of this partnership is ambitious, as it aims to position Pecém as the biggest producer and exporter of green hydrogen in Brazil and Rotterdam as the "gateway for green hydrogen to the European continent", according to Dutch Prime Minister Mark Rutte (Falcão, 2023).

Examining consistency and coordination

Comparing the visible coordination efforts between the European Commission and Member States on hydrogen projects in Chile and in Brazil reveals some discrepancies.

The Team Europe Initiative in Chile shows positive signs of strategic coordination and collaboration between the EU and Member States, as the experience and expertise gathered by Germany and the Netherlands in Chile serve as a backbone to the Team Europe Initiative. By drawing on the existing bilateral relations of the Member States and integrating them into the projects under this initiative, the European Commission commits to the joint strategic approach under Team Europe and creates bridges between Member States. Interviews with EU officials reveal that the involvement of key Member States in the design of a Team Europe Initiative is indeed a critical factor for more effective coordination throughout the implementation of the projects.

On the other hand, the involvement of the Netherlands and the EU in Brazil appears to reflect a more fragmented and less coordinated approach. While the ports of Sines and Rotterdam highlight their roles as crucial European hydrogen hubs in their communication, they make no mention of a joint strategy established between the EU and the Netherlands when discussing their agreements with Brazil (APS, 2023; Port of Rotterdam, 2023b). A European strategic approach for the supply of green hydrogen does seem to exist given the close timing of Member States' commitments with Brazil. However, the absence of joint communication undermines its visibility, raising questions about the nuts-and-bolts of cooperation between Member States and the EU on their energy and climate partnerships.

Improving collaboration should be an essential objective of European external action in terms of green hydrogen. The European Commission's 2020 Strategy on Hydrogen clearly lays out the need for enhanced cooperation between national and subnational governments, the EU and private actors on the deployment of hydrogen in Europe. It also emphasises the role the EU could take in developing international standards for the production of clean hydrogen, currently largely determined by market demands (European Commission, 2020; Fekete et al., 2023). It is essential that the EU and its Member States present a united stance in international cooperation to participate in setting global sustainability standards and adopting a common strategic approach to define relevant criteria for green hydrogen accessing the European single market.

Showing a joint approach is also of strategic importance for the EU to adopt a long-term view in its climate partnerships, especially in the light of the fossil fuel links between some EU Member States and partner countries. In 2021, various EU Member States were among the top 10 importers of Brazilian oil, with Spain, Portugal and the Netherlands importing each over USD1 billion worth of Brazilian

oil (Bueno, 2024). The expansion of oil in the Brazilian economy carries the threat of "locking Brazil into a more carbon intensive energy system and leaving much of its considerable potential for renewable power generation untapped" (Climate Action Tracker, 2023). There are counter-productive implications of increasing fossil fuel trade between the EU and Brazil, while the EU is working with Brazil to develop green hydrogen and renewable energy.

EU AND SELECTED MEMBER STATES STRATEGIES ON PARTNERSHIPS ON CRITICAL RAW MATERIALS

The EU and Member States are increasingly turning to critical raw materials partnerships as critical raw materials are vital for the expansion of the energy transition and necessary components in clean energy technologies, including electric vehicles, solar panels, wind turbines and batteries. Sourcing critical raw materials will be a massive challenge with significant geopolitical consequences, given the high concentration of supply chains of critical raw materials in only a handful of countries. Chile has one of the largest deposits of lithium in the world and Latin America is a region that the EU is more focused on developing partnerships with, as mentioned above.

Motivation for Strategic Partnerships on CRMs

Following the global impacts on supply chains resulting from several international crises, the EU is prioritising addressing vulnerabilities in its supply chains, as it is currently heavily dependent on only a few countries to supply critical raw materials. China has a tight hold on global supply chains for critical raw materials, ranging from mining and primary production to processing, refinement and exports. The EU is 100% dependent on imports of heavy rare earth elements, while Chile supplies 79% of lithium imports, and the Democratic Republic of Congo supplies 63% of cobalt imports to the EU (European Commission, 2023f).

As demand is expected to skyrocket, countries with critical raw materials recognise their value and aim to move up the value chain by going beyond merely exporting raw materials. Countries plan to invest in processing and refinement capabilities, using their vast sources to bolster their own industries and economies and avoid a pure extractive relationship with countries seeking to source critical raw materials. This trend is evidenced, for instance, by Indonesia imposing export restrictions on raw materials like nickel or by Chile supporting public-private partnerships with the government's involvement.

Under the EU's Critical Raw Materials Act (CRMA), i.e. the EU's action plan to ensure a secure and resilient supply of critical materials, the EU has established Strategic Partnerships to strengthen the supply of critical raw materials to the EU, diversify the countries from which the EU imports these materials, and support partner countries' industrial ambitions. With an average lag time of 16.5 years from

exploration of critical raw materials to first production, it is necessary for the EU to take a long-term view on these partnerships (IEA, 2021). As outlined in the CRMA, the Strategic Partnerships are meant to support cooperation in capacity building, development of employment opportunities and higher Environmental, Social and Governance (ESG) standards in the partner country, all aimed at promoting sustainable value chains (European Commission, 2023d). The partnerships are funded through the European Investment Bank, Global Gateway, Team Europe, and other EU financing programmes and instruments. Before a strategic partnership is implemented, according to the CRMA, extensive consultation with local communities, especially indigenous communities, must take place, along with detailed plans for environmental restoration of mining sites after extraction.

Led by DG GROW, the EU has signed Strategic Partnerships with Canada, Ukraine, Kazakhstan, Namibia, Argentina, Chile, Zambia, the Democratic Republic of Congo, and Rwanda since 2021. The selection of partner countries by the EU takes into account their regulatory framework, potential for extraction, processing and recycling capabilities, existing cooperation agreements, Global Gateway projects, and mutual benefits of the partnership for both the partner country and the EU. Strategic Partnerships are legally non-binding agreements and do not need ratification from Member States, unlike free trade agreements, for example. However, the CRMA calls on Member States to coordinate with the Commission to "ensure coherence between their bilateral cooperation" with third countries and the EU's Strategic Partnerships, as well as to support cooperation measures (European Commission, 2023e).

Key players and ongoing partnerships in Chile

In June 2023, Chile and the EU established a Strategic Partnership as a part of the wider negotiations on an EU-Chile trade agreement, which could grant more access to Chile's critical raw materials, including lithium. The Strategic Partnership with Chile was launched under the EU's Global Gateway Investment Agenda for Latin America and the Caribbean. The agreement is currently under the memorandum of understanding (MoU) phase, with no financial commitments attached yet. The overall goal, according to the MoU, is to utilise critical raw materials value chains to stimulate sustainable and inclusive economic growth, and develop the processing, refining, and recycling sectors instead of solely mining raw materials in partner countries (European Union; Chile, 2023). The partnership aims to support sustainable raw materials value chains through joint projects, cooperation on research and innovation, alignment on ESG standards, and the enhancement of skills and education in Chile. So far, the Strategic Partnerships, including with Chile, have not been paired with financial commitments. Some EU lawmakers are calling for an EU Raw Materials Fund as a part of these strategic partnerships and Global Gateway programmes (Simon, 2023). The next steps planned involve

the EU and Chile developing a roadmap to guide cooperation by outlining priority areas, establishing timeline and commitments, and setting the path forward for the implementation of the partnership.

Examining consistency and coordination in EU & selected Member State CRM Strategies

Against the backdrop of increasing geopolitical challenges, some Member States are at the forefront of developing strategies to secure critical raw materials and implement partnerships on CRMs.

Germany revised its raw materials strategy in response to supply chain disruptions, as well as the rise in protectionist policies, as Germany is taking a leadership role in securing critical raw materials. Under the previous strategy, Germany launched bilateral raw material partnerships with Kazakhstan, Mongolia and Peru, but these were dismissed as ineffective, weak on sustainability criteria and not mutually beneficial partnerships (Schmid, 2021). According to the revamped strategy, the German government will expand multilateral, regional and bilateral partnerships supported by concrete projects and initiatives with long-term buy-in from companies. It aims to diversify imports to Germany while prioritising the interests of the partner countries (German Federal Ministry of Economic Affairs and Climate Action, 2023). The strategy outlines Germany's collaboration with the EU Commission, France and other Member States, as well as selected partners like the US, Canada and Australia, to establishing uniform ESG standards for raw material extraction, processing and recycling. It also mentions coordination with selected partners like the US and Japan through initiatives such as the US-led Minerals Security Partnership and the Germany and Chile-led Climate Club, as well as participation in multilateral processes like the OECD's working group on critical raw materials and ongoing work in the G7.

There appears to be slight inconsistencies in the focus of the EU's and Germany's critical raw materials strategies. Germany's new strategy includes developing Competence Centres for Mining and Mineral Sources in selected countries to help German companies sell mining technology, assist in the analysis of potential projects, and offer German companies with information on opportunities and risks of the market (German Federal Ministry of Economic Affairs and Climate Action, no date). Meanwhile, the EU's Strategic Partnerships have specific criteria outlined in the Critical Raw Materials Act to significantly contribute to the partner country's industry by supporting the development of the value chain and support employment opportunities and skills building in the country. Germany seems to focus on promoting its mining technology in partner countries, while the EU is focused on securing resilient supply chains and building up local value through creating jobs and supporting skills development.

France is also playing an active role in the push to secure critical raw materials for their energy transition in the EU. As a part of France's 2030 agenda and industrial policy strategy, the French government is launching a critical raw materials investment fund for both domestic and international projects (France, 2023a). As mentioned, the EU is also considering starting a fund for critical raw materials, which could be coordinated with Member State CRM funds. Last year, France signed bilateral agreements with Australia, Canada and Mongolia on cooperating on mining exploration projects. The French critical raw materials strategy highlights how the plan should be consistent with the EU Critical Raw Materials Act, showing the intention to align with the EU strategy on CRMs (France, 2023b).

To foster more coordination on the Critical Raw Materials Act between Member States, Germany, France and Italy launched a trilateral exchange on strengthening the security of supply chains for critical raw materials (Wettengel, 2023). At their first meeting in June 2023, they agreed to present common positions on the EU's Critical Raw Materials Act, and coordinate on proposals in multilateral fora like the G7 and international initiatives. The group also highlighted the importance of setting joint targets and establishing joint projects for securing critical raw materials. The EU and some Member States, exemplified by Germany and France, are recalibrating their approaches on critical raw materials, emphasising strong collaboration with partner countries, though there are nuances in national strategies and partnership frameworks that underscore the need for ongoing coordination and alignment on priorities.

THE EU'S RENEWABLE ENERGY PARTNERSHIPS WITH KENYA

In recent years, the importance of renewable energy (RE) partnerships between EU countries and African nations, such as Kenya, has gained significant traction. These partnerships, often spearheaded by the European Union and its Member States, can be pivotal in fostering sustainable development, mitigating climate change, and advancing global energy transitions.

Motivations behind RE partnerships

Engaging in RE partnerships offers multifaceted benefits for both the EU and partner countries like Kenya. While Africa's contribution to global emissions remains relatively small compared to industrialised nations, prioritising sustainability in the region's economic growth and infrastructure development is crucial for sustainable development and future competitiveness in the countries.

By transitioning towards renewable energy sources, Kenya and other African countries can diverge from fossil fuel-dependent development pathways to develop their economies sustainably and make important contributions to global emissions reductions. The impact of this transition will be significant both now and even more so in the future as access to renewable energy is fundamental for achieving

various Sustainable Development Goals (SDGs) in partner countries, including on Affordable and Clean Energy (SDG 7), as well as those related to education, health, and economic development. Renewable energy projects can thus serve as catalysts for sustainable development efforts, offering opportunities for job creation, enhancing energy access, and improving livelihoods in Kenya.

By supporting the development of renewable energy infrastructure, donor countries can not only stimulate economic growth and innovation in recipient nations but also contribute to their own decarbonisation goals by, for instance, facilitating the creation of future markets for green hydrogen. In addition, RE partnerships provide donor countries with opportunities to showcase and sell their renewable energy technologies and services. They also offer avenues to strengthen diplomatic ties and promote diversification of economic relationships by reducing Africa's dependence on other geopolitical actors, such as China, for example.

Key players and ongoing partnerships in Kenya

In the context of renewable energy development in Kenya, ongoing partnerships involve various stakeholders, including Germany, the European Union (EU), and several development finance institutions. These collaborations are characterised by shared commitments to advancing sustainable development goals and addressing climate change challenges, with a focus on transitioning Kenya towards renewable energy sources and enhancing economic resilience.

Germany's priorities in Kenya, as outlined by the German Federal Ministry for Economic Cooperation and Development (BMZ), focus on sustainable economic development, climate and energy transition, and the transformation of agricultural and food systems. Through its P+ partnership with Kenya, Germany has committed funds totalling EUR 153 million, with projects like the uprating of Kenya's Olkaria I and IV geothermal plants receiving support (German Federal Ministry for Economic Cooperation and Development, 2024). The project, which seeks to increase the capacity of two power stations from the current combined total of 300MW to 340MW, will receive additional co-financing of EUR 70 million from KfW (KfW, 2023).

The EU's Multiannual Indicative Program (MIP) for Kenya underscores similar priorities such as renewable energy utilisation, adaptation of agricultural systems to climate change, and environmental conservation. The EU's three Global Gateway projects in Kenya include initiatives such as transferring Polish biogas technology to Kenya's agricultural sector, implementing the Zambia-Tanzania-Kenya Interconnector, and upgrading energy generation capacity in Kenya's Olkaria I & IV projects (European External Action Service, 2021).

The Team Europe Initiative in Kenya focuses on the Green Deal and transition themes and includes various actors, such as Member States and development finance institutions to advance renewable energy, sustainable agriculture, and urbanisation efforts in Kenya.

Examining Consistency and Coordination in Renewable Energy Partnerships in Kenya

When analysing the landscape of RE partnerships in Kenya, it becomes evident that various initiatives have a significant degree of overlap in priorities and action areas, particularly between the German P+ partnership with Kenya and the broader Team Europe Initiative.

In support of Kenya's goal of transitioning wholly to renewable energy sources by 2030, both Germany and the EU prioritise activities that promote the use of renewable energy sources and reduce Kenya's reliance of fossil fuels. Further, both recognise the need to adapt agricultural systems to address climate change, although by employing different approaches. Germany's approach is more specific focusing on assisting Kenya in reducing reliance on fossil fertilisers through green hydrogen production, while the EU takes a more sector-wide perspective.

Another key example of this convergence is the shared focus on upgrading the Olkaria I and IV geothermal power plants, which have been identified as pivotal components within both the German partnership with Kenya and the Team Europe Initiative.

Such an overlap doesn't inherently denote inconsistency, on the contrary, pooling forces and resources to work on selected topics can lead to significant progress, such as the expansion of renewable energies in the partner country. However, it is important that there is clear and transparent communication about how these engagements complement each other or build upon one another. In the case of the upgrading of the geothermal power plants, there is an evident deficiency in transparent communication in the German communications about its activities in Kenya, in which Team Europe is not mentioned at all (German Federal Ministry for Economic Cooperation and Development, 2024).

3.2 INSIGHTS FROM COUNTRY CASE STUDIES

The above country cases spotlight key challenges confronting the EU as it develops climate partnerships across the selected themes of green hydrogen, critical raw materials and renewable energy. Overlapping challenges are evident in coordination and inconsistencies in implementation, which could lead to a waste of resources.

From the case study on hydrogen in Chile, the Team Europe Initiatives present positive signs of strategic collaboration between Member States and the EU. Furthermore, a comparison of the Brazil and Chile cases show that the cooperation is improved when projects take place under the umbrella of a Team Europe Initiative. The case study on renewable energy in Kenya demonstrates that the Team Europe

Initiatives align substantially with Member States' partnerships, such as the P+ by Germany, but could benefit from improved coordination between Member States and the EU to provide full transparency on their joint work on these specific projects. The case studies also reveal how the EU and Member States' priorities can diverge as interests may differ, making joint strategies challenging.

/ ∧ 04

KEY TAKEAWAYS ON EU CLIMATE PARTNERSHIPS

The country case studies and a series of interviews with government representatives from selected EU Member States, representatives from EU institutions, and civil society organisations highlighted several key findings regarding the development and implementation of coherent and consistent climate partnerships among the EU, its Member States and partner countries.

01 PRIORITIES OF MEMBER STATES AND THE EU CAN BE LINKED MORE STRATEGICALLY TO LEVERAGE THE POTENTIAL OF TEAM EUROPE

The Team Europe approach aims to create a pragmatic enabling environment for enhanced cooperation between Member States and the EU Commission. By extending the Team Europe approach initially to development cooperation and increasingly to measures for climate action, the Von der Leyen Commission has embarked on a promising path that has the potential to address the coordination and communication problems that still exist in climate partnerships and projects in partner countries. However, Member States, at times, have unaligned strategic priorities and interests in the area of climate partnerships and climate diplomacy. Currently, the bilateral relationships between individual EU Member States and their partner countries often take precedence over the EU's collective efforts in climate partnerships. This prioritisation sometimes leads to a lack of strategic alignment and effective communication, hindering the potential for collaborative and improved cooperation. In addition, some Member States do not see the Team Europe approach being used to its full potential and not properly functional, showing the need for more collective buy-in from all Member States.

→ Deeper coordination on identifying strategic priorities among European players is required to enhance the visibility and coherence of the EU's efforts with partner countries, as well as for fostering greater synergy among programmes. Positioned as a pivotal tool for promoting collaboration, the Team Europe approach underscores the importance of pooling resources to maximise the effectiveness of initiatives, such as through the rollout of Team Europe Initiatives. Member States and the EU can cooperate more effectively and leverage the potential of Team Europe when interests are bundled strategically and accompanied by a joint communication strategy. Such a joint communication strategy could improve transparency on priorities and lead to stronger coordination among the EU and Member States.

02 THE EU'S PARTNERSHIP OFFER NEEDS MORE CLARITY TO ENSURE EFFECTIVE IMPLEMENTATION

With an array of programmes, ranging from Global Gateway and Team Europe Initiatives to Green Partnerships and Green Alliances, the Commission and EU delegations often struggle with effectively communicating the projects that the EU is engaged on in partner countries. This challenge is compounded by the multitude of bilateral climate and energy partnerships undertaken by individual Member States. As a result, understanding the comprehensive scope of Team Europe's partnership endeavours becomes increasingly complex.

→ The EU's offer on partnerships needs to be more clearly communicated to countries. This can be done by crafting clear and concise messages to convey goals, benefits, and objectives of Global Gateway and its other partnership frameworks to stakeholders, including partner countries, investors, media, and the public, both on an overarching strategy level and on a project level. Creating an envoy for Global Gateway under the Commission's Presidency is one proposal mentioned by interviewees that could potentially support communication efforts with partners by establishing a key official and team with whom partner countries could communicate.

02 A LONG-TERM STRATEGIC VIEW ON PARTNERSHIPS IS NECESSARY

The EU, together with its Member States, faces challenges in taking a long-term view for strategic and holistic climate partnerships. Prioritising short-term gains to align with political agendas can risk the desired achievements of partnerships and EU's credibility among partners. A lack of coordination among the EU and its Member States is one of major challenges to developing a coherent long-term strategy for partnerships.

→ A long-term vision for strategic and holistic climate partnerships involving both EU institutions and Member States is necessary. This can be fostered by the EU and Member States sharing strategies on their bilateral partnerships and communicating with partner countries and stakeholders about partnership formats such as Team Europe Initiatives and Global Gateway. Taking a long-term vision also includes developing a strategy for reducing the imports of fossil fuels to the EU from partner countries and instead focus solely on fostering economic growth while concurrently transitioning towards decarbonised economies in partner countries.

04 CLARITY IN RESPONSIBILITIES AND INCREASED RESOURCES AMONG EU INSTITUTIONS IS NECESSARY TO STRENGTHEN CLIMATE PARTNERSHIPS

In key EU institutions like the Commission, the EEAS, and the EU delegations, there is often an unclear delineation of roles and responsibilities on cross-cutting issues like climate action. Furthermore, initiatives like Team Europe, Global Gateway, and other climate partnerships suffer from inadequate resource allocation, which affects the availability of qualified staff.

→ To foster thriving climate partnerships, a diverse range of expertise and sufficient resources is needed in key EU institutions responsible for implementing climate partnerships and climate diplomacy. This includes, for example, DG INTPA and DG CLIMA, but also importantly, the EU's diplomatic service, the EEAS, both at its headquarters and its delegations in partner countries. These institutions should have enough qualified personnel who bring expertise in areas such as mobilising public and private funds, possess technical expertise, and are knowledgeable about the local context and stakeholder engagement. These measures are crucial to ensuring that partnerships are locally rooted and effectively coordinated among Brussels, the Member States, and partner countries.

05 POLITICAL LEADERSHIP AND BUY-IN ARE CRITICAL FOR SUCCESSFUL CLIMATE PARTNERSHIPS

Strong political buy-in, engagement and visibility at the highest political level from both the EU, its Member States and partner country is essential for successful climate partnerships.

→ Overall, effective climate partnerships rely on strong political leadership and buy-in from the EU, its Member States and partner countries. The examples of Global Gateway and the JETPs have underlined the importance of political support at the highest level. Ensuring high-level political buy-in is important in securing sufficient resources or enhancing coordination. However, while political will can drive the announcement of partnerships, it should be noted that successful implementation of these activities is only possible if the framework conditions for implementation are in place. This includes sustainable commitment from all those involved, transparent financing mechanisms and integrative consultation processes Without a solid plan in place for execution, there's a risk that the partnership will fail, potentially leading to the EU losing its credibility for future programmes and initiatives.

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