Policy brief

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COP30: Breaking the Deadlock?

The growing momentum behind a fossil fuel phase-out

1. Where do we go from here?

What does the outcome of the 30th annual Conference of the Parties (COP30) mean for fossil fuel production and global efforts to phase-out fossil fuels? On the surface, it would appear to have been a failure. After intense talks that promised to deliver a roadmap to support and guide the transition away from fossil fuels, which could be part of the official UN-process, the final text skirted the issue all together and contained no mention of fossil fuels.

This setback is consequential. COP30 will likely be remembered as the point at which the international process failed to steer the world away from breaching the 1.5°C threshold set in Paris a decade earlier. Against this backdrop, a core strategic question emerges: what role can the COP play in an increasingly unstable climate era – one defined by escalating risks, diminishing room for error, and the increasing likelihood of overshoot?

As is the case with most COPs, the outcomes expressed in the conference text are only part of the story.

The signals, commitments and frustrations that brew in the conference hall between country delegations, and from civil society, tend to dictate the direction of travel in the months ahead before countries gather again at COP31 in Antalya, Türkiye.

This briefing from the SUS-POL Research Project at the University of Sussex collates the headline outcomes from COP30 and analyses what they could mean for global efforts towards a fair, funded and fast fossil fuel phase-out.

1.1 COP30 outcomes relevant to fossil fuels

The Belém Package, or the global mutirão, adopted at COP30 represents a wide-ranging political compromise that advances several strands of the Paris Agreement but falls short of setting a clear pathway for phasing out fossil fuels as part of the formal COP process, supported by 86 states at the conference, that remains the central determinant of humanity's ability to curtail the climate crisis. Brazil intends to bring forward two roadmaps, on transitioning away from fossil fuels and deforestation, to present at COP31 outside of formal UN proceedings.[1]

The package brings together 29 decisions spanning adaptation, finance, just transition, and capacity building, including a pledge to triple adaptation finance by 2035, the agreement of 59 indicators for the Global Goal on Adaptation (GGA), the establishment of a Just Transition Mechanism intended to support socially equitable economic restructuring, and, in a first, trade-related climate measures.

While these measures strengthen the implementation architecture, they do not directly constrain fossil fuel expansion, nor do they operationalise the call from many Parties for a "just, equitable and fully financed transition away from fossil fuels".[2] In fact, the Belem Package contains no reference to fossil fuels in the core decision text, leaving phase-out efforts to voluntary national or plurilateral initiatives outside the United Nations Framework Convention on Climate Change (UNFCCC) framework.

What's more, the Belém Package saw further delays to crucial pledges on finance. The headline decision to triple adaptation finance pushed the target back to 2035 for it to be delivered, which, according to civil society, is "far too late for those on the frontlines".[4] UNEP reported that just $26bn of adaptation finance was proffered by wealthy countries in 2023, a far cry from the estimated $310bn needed annually through to 2035.[4] The COP30 outcome also lacks a base year and fails to outline the type of finance and who will be tasked with delivering it, posing serious questions about the accountability. What's more, it was reported that the tripling of adaptation finance was being used as leverage to get Least Developed Countries (LDCs) to support the demand for a fossil fuel phase-out roadmap, which many would not support.[5]

Likewise, the Just Transition Mechanism, known as the Belém Action Mechanism, aims to build "international cooperation, technical assistance, capacity-building, and knowledge-sharing" to support just transitions. But no binding finance commitment is attached to the mechanism – a reflection of the wishes of the governments of wealthy nations who insisted there was already sufficient finance available and that just transitions were a "domestic issue".[6]

The inclusion of trade-related climate measures, known in COP-speak as Unilateral Trade Measures (UTMs), in the outcome text presents an interesting development. Though trade was not on the conference agenda, the outcome text cemented the role of trade in driving climate action with Parties agreeing to hold three dialogues over the next three UNFCCC sessions in Bonn to boost international cooperation on trade and climate. The final text "reaffirms" that climate measures, "including unilateral ones, should not constitute" trade restrictions that are "arbitrary" or "discriminatory".[7]

The omission of a fossil fuel road map underscores the persistent political divisions and obstacles at the heart of global climate governance. Progress on institutions and finance continues iteratively, but the structural transformation of energy systems away from fossil fuels, and the finance, compliance and accountability mechanisms needed to drive it, remains largely unresolved. Such an outcome reflects civil society concerns that COPs are turning into cycles of dialogue and reporting, rather than delivering on the sort of binding action urgently required. In the case of COP30, however, it is clear that its omissions have spurred on momentum elsewhere, beyond the UNFCCC process.

[1] Carbon Brief, 2025, 'COP30: Key outcomes agreed at the UN climate talks in Belém', https://www.carbonbrief.org/cop30-key-outcomes-agreed-at-the-un-climate-talks-in-belem/
[2] CAN, 2025, 'COP30 takes a hopeful step towards Justice, but does not go far enough', https://climatenetwork.org/2025/11/22/cop30-takes-a-hopeful-step-towards-justice-but-does-not-go-far-enough/
[3] Ibid.
[4] UNEP, 2025, 'Adaptation Gap Report 2025', https://www.unep.org/resources/adaptation-gap-report-2025
[5] The Guardian, 2025, 'Miliband urges Cop30 to find 'creative' routes to roadmap on phasing out fossil fuel', https://www.theguardian.com/environment/2025/nov/21/miliband-cop30-creative-routes-roadmap-phase-out-fossil-fuel
[6] CAN, 2025, 'Solidarity with the People of Sudan – United Kingdom Wins Fossil', https://climatenetwork.org/resource/solidarity-with-the-people-of-sudan-united-kingdom-wins-fossil/
[7] Carbon Brief, 2025, 'COP30: Key outcomes agreed at the UN climate talks in Belém', https://www.carbonbrief.org/cop30-key-outcomes-agreed-at-the-un-climate-talks-in-belem/

1.2 The Energy Landscape post-COP30

The new is yet to displace the old

The global energy system is now defined by a widening divergence between technological progress and political inertia. On one side, the rapid deployment of renewable energy technologies continues to exceed expectations, attracting almost double the investment that flows into fossil fuels.[8] The drivers behind this 'electrotech' revolution are low carbon technology's superior efficiency, low costs and its ability to provide autonomy and security in an age of geopolitical upheaval.[9] In many countries and regions, electrification has become the major driver of economic growth and development and many states in the Global South are successfully leapfrogging straight to low-carbon technology.[10]

Yet the legacy fossil-fuel system remains deeply entrenched. The 2025 Global Carbon Budget projects a 1.1% increase in fossil CO_2 emissions in 2025,[11] even as the power sector decarbonises,[12] because oil, gas, and coal continue to dominate hard-to-abate sectors.[13] Fossil fuels still account for roughly 95% of final energy demand in transport, 56% in heavy industry, and 37% in buildings. As a result, the remaining carbon budget for 1.5°C is now effectively exhausted and likely to be fully depleted before 2030.[14]

Cracks in the fossil fuel industry's power may, nevertheless, be beginning to appear. The Carbon Tracker initiative suggests that there could be a "quiet retreat" underway, whereby fossil fuel majors consolidate their capital expenditures in order to service dividend payments and share buybacks – a dynamic described as "harvest mode".[15] This, paired with credit downgrades, growing consolidation within the market, and mushrooming debt suggests that "the oil industry knows when to quietly exit the battlefield".[16]

It should be stressed, however, that oil majors tightening their spending and redirecting money towards shareholders does not mean they will not fight to maintain the status quo for as long as possible. Indeed, the power of the fossil fuel industry was clear to see at COP30. In official panel discussions during COP30, oil executives from European and US majors remained steadfast that "crude oil and hydrocarbons are going to play a critical role in everybody's life for a long time to come".[17] To ensure this remains the case, one in every 25 participants at COP30 was a fossil fuel lobbyist, a 12% rise on the previous gathering in Baku, Azerbaijan.[18]

Without a doubt, a new energy system is being born and, with it, the rules of geopolitics and industrial development are being rewritten. But the arrival of this new system is yet to unseat the old.

[8] IEA, 2025, 'World Energy Outlook 2025', https://www.iea.org/reports/world-energy-investment-2025
[9] Ember, 2025, 'The Electrotech Revolution', https://ember-energy.org/latest-insights/the-electrotech-revolution/
[10] Ibid.
[11] Global Carbon Budget Project, 2025, 'Fossil fuel CO_2 emissions hit record high in 2025', https://globalcarbonbudget.org/fossil-fuel-co2-emissions-hit-record-high-in-2025/
[12] Ember, 2025, 'Q3 Global Power Report: No fossil fuel growth expected in 2025', https://ember-energy.org/latest-insights/q3-global-power-report-no-fossil-fuel-growth-expected-in-2025/
[13] Ibid.
[14] Global Carbon Budget Project, 2025, 'Fossil fuel CO_2 emissions hit record high in 2025', https://globalcarbonbudget.org/fossil-fuel-co2-emissions-hit-record-high-in-2025/
[15] Carbon Tracker Initiative, 2025, 'The Quiet Retreat: Why the oil and gas industry is implementing its own decline, even as the IEA resurrects an old growth scenario', https://carbontracker.org/the-quiet-retreat-why-the-oil-and-gas-industry-is-implementing-its-own-decline-even-as-the-iea-resurrects-an-old-growth-scenario/
[16] Ibid.
[17] Reuters, 2025, 'Exxon CEO expects long-term role for oil and gas, maybe not as fuel', https://www.reuters.com/business/energy/exxon-ceo-expects-long-term-role-oil-gas-maybe-not-fuel-2025-11-07/.
[18] Kick Big Polluters Out, 2025, 'Fossil fuel lobbyists flood COP30 climate talks in Brazil, with largest ever attendance share', https://kickbigpollutersout.org/Release-Kick-Out-The-Suits-COP30

Uneven investment and unequal geography of clean energy capital

Although global clean energy investment is growing, it remains heavily concentrated among wealthy industrialised nations. OECD countries and China account for the overwhelming majority of climate capital flows, shaping supply chains, innovation cycles, and industrial capture.[19] Multilateral Development Banks (MDBs) have made substantial progress in scaling up climate finance generally, and more than half of their 2023 climate funding went to Low- and Medium-Income Countries (LMIC).[20] However, "low-income countries" (in particular Least Developed Countries (LDCs) and Small Island Developing States (SIDS)) still get a relatively smaller share of total flows, especially when compared to middle-income developing countries.[21] When these states do receive climate finance, there are persistent concerns that the conditions attached to the finance will worsen sovereign debt burdens and stymie countries' capacity to pursue other developmental goals.[22]

At the same time, rapidly falling solar costs are enabling many developing countries to expand renewable access at record pace, with some states in Africa experiencing what is described as a "take off".[23] For instance, the solar panels imported into Sierra Leone from August 2024 to 2025 will, if installed, generate electricity equivalent to 61% of the total reported 2023 electricity generation.[24] This solar uptake is being driven by Chinese businesses, commercial banks and industrial "overcapacity".[25]

This dynamic is double-edged. It accelerates deployment but risks deepening strategic dependencies, complicating efforts to build domestic value chains or pursue green industrialisation in a manner that delivers social and environmental benefits. As more governments attempt to tie electrification to economic transformation, access to affordable finance and diversified supply chains becomes a central constraint on development rather than a purely energy issue. In light of COP30, these requirements should be included in the remit of the Just Transition Mechanism.

1.3 Political dynamics of the post-COP period

A fragmenting global system

The political environment in which fossil fuel phase-outs must now occur is increasingly volatile. Geopolitical tensions, militarisation, and proliferating trade barriers are reshaping global markets. At the same time, a dysfunctional international finance system continues to hinder emerging economies from accessing the capital necessary for low-carbon industrialisation.

Low and middle-income states alike continue to struggle to chart a path to development and prosperity that does not rely upon the exploration and retraction of fossil fuels. Brazil, the host of COP30, approved a controversial oil project in the mouth of the Amazon before the climate negotiations began. This was justified on the grounds of diversifying Brazil's fiscal base as the state-owned oil company, Petrobras, remains an important source of public revenue for Lula's developmental ambitions.[26] This dilemma reflects a broader pattern across Africa, Latin America and parts of Asia: fossil fuels are still deemed to be a major tool of state-building and economic management, despite their clear and obvious financial and environmental risks.

Diplomatic backlash to climate and energy policy

Unfortunately, it is not just governments backtracking on domestic commitments. In some instances, governments have gone further and are actively encouraging trading partners to dilute their own climate commitments to bolster the expansion of fossil fuel use. Both the Trump administration in the US and Qatar have demanded that the European Union reverse implemented climate policies in order to enable greater volumes of liquified natural gas (LNG) imports.[27]

[19] Climate Policy Initiative, 2023, 'Global Landscape of Climate Finance 2023', https://www.climatepolicyinitiative.org/publication/global-landscape-of-climate-finance-2023/
[20] World Resources Institute, 2024, 'Multilateral Development Bank Climate Finance: The Good, Bad and the Urgent', https://www.wri.org/insights/mdb-climate-finance-2023.
[21] Ibid.
[22] Debt Justice, 2024, 'Debt Demands & Debunking Distractions for Climate Action', https://debtjustice.org.uk/wp-content/uploads/2024/05/Debt-demands-for-climate-action_June-24.pdf
[23] Ember, 2025, 'The first evidence of a take-off in solar in Africa', https://ember-energy.org/latest-insights/the-first-evidence-of-a-take-off-in-solar-in-africa/
[24] Ibid.
[25] Dialogue Earth, 2025, 'How Chinese solar companies are adapting to realities on the ground in Africa', https://dialogue.earth/content/uploads/2025/10/How-Chinese-solar-companies-are-adapting-to-realities-on-the-ground-in-Africa.pdf
[26] OEC, n.d., 'Brazil', https://oec.world/en/profile/country/bra
[27] The Guardian, 2025, 'US demands EU reverse new climate rules to allow surge in gas imports', https://www.theguardian.com/us-news/2025/oct/22/us-eu-climate-rules-lng-gas

The Trump administration has been using trade deals and security pacts as a means of forcing states to buy American fossil fuels and US engagements across Latin America from Argentina to Colombia and Venezuela reflect this geopolitical imperative. Many of these contracts are multi-decadal, locking recipient states into fossil fuels when the price of renewable energy generation continues to fall. The scale of proposed fossil fuel purchases are gigantic – so much so, that they may be impossible to ever fulfill. For instance, the European Union intends to "procure US liquified natural gas, oil, and nuclear energy products with an expected offtake valued at $750 billion" through to 2028. This amount of fossil gas would be roughly four-times the current levels of EU imports. Elsewhere, Indonesia has purportedly pivoted away from Middle Eastern oil imports and signed a new $15 billion energy import agreement with the USA.[28]

In Latin America, leaders in supply-side climate policies to leave fossil fuels in the ground are facing challenges with Costa Rica's President threatening to reverse a ban on oil and gas exploration that has held since 2002,[29] while President Petro in Colombia's pledge to end new licenses for oil and gas looks set to be reversed by a change of government next year and a domestically orchestrated backlash by powerful fossil fuel actors.

Industrial headwinds, domestic politics, and risks of backlash

While green industrialisation offers significant long-term potential, capturing value from new technologies requires early investment, patient capital, and access to markets – advantages that China, and to some extent the EU and US, have consolidated. For countries seeking late entry into solar manufacturing or battery supply chains, the window may already be closing.

These economic constraints feed directly into political volatility. In several countries, governments have diluted or backtracked on climate commitments in response to energy-security concerns, inflationary pressures, or industrial lobbying. Meanwhile, public frustration, which is often fuelled by stagnant wages, high energy bills, and the perceived unfairness of transition policies, has created fertile ground for anti-climate narratives. Indeed, in some nations where there has long been a consensus around the necessity of climate action, this is beginning to break down. This is true of the UK, for example, keen to demonstrate leadership by restricting oil and gas licenses and leading international initiatives such as the Global Clean Power Alliance[30] but where climate and energy policy faces fierce backlash.

This is the political terrain on which a rapid and managed phase-out of fossil fuels must be delivered: a world where incumbents are powerful, international cooperation is stuttering, and domestic politics are increasingly punitive for governments perceived to move too fast or too unevenly on climate action.

New forms of multilateralism?

The Belem process saw an attempt to re-calibrate negotiations towards the energy transition. By foregrounding trade, supply-chain integration, and the political economy of new growth sectors, it offered a mechanism for reducing geopolitical risk while fostering economic and industrial growth. In practice, this means enabling cooperation, through mutirão, where interests overlap – such as securing mineral supply or coordinating clean-energy manufacturing – without requiring alignment on all aspects of foreign policy. Viewed in this context, COP30 could be deemed as part of a broader effort to manage an unfolding shift in global power and trade.

Some have argued that negotiations at Belem point to the emergence of a new form of multilateralism suited to a more fragmented geopolitical environment.[31] It preserves the core Paris principles of nationally driven ambition, capability, and responsibility, but supplements them with cooperative approaches designed to accelerate implementation. This model accepts that formal negotiating blocs are increasingly constrained by geopolitical tension and that progress now depends on flexible, purpose-built coalitions capable of working across political divides.

[28] Jakarta Globe, 2025, 'Indonesia to Slash Middle East Oil Imports in Favor of $15B US Energy Deal', https://jakartaglobe.id/business/indonesia-to-slash-middle-east-oil-imports-in-favor-of-15b-us-energy-deal
[29] The Observer, 2025, 'Costa Rica's green halo starts to slip as president toys with gas and oil', https://observer.co.uk/news/international/article/costa-ricas-green-halo-starts-to-slip-as-president-toys-with-gas-and-oil
[30] SUS-POL Research Project, 2025, 'The Global Clean Power Alliance: a label in search of an idea?', https://www.sussex.ac.uk/webteam/gateway/file.php?name=gcpa-sus-pol-policybrief-march2025.pdf&site=676
[31] Andrew Higham, 2025, 'How Belem is shifting the gears on global climate action', *Backchannel*, https://backchannel1.substack.com/p/how-belem-is-shifting-the-gears-on

In contrast to the binary architectures of earlier eras of climate negotiations – Kyoto's top-down burden-sharing and Paris's fully decentralised voluntarism with some binding elements – the Belem approach represents a hybrid. It enabled groups of willing countries to coordinate policies, align incentives, and address shared transition challenges. In effect, it operationalises collective action without requiring consensus.

However, regardless of these apparent innovations in climate governance, the negotiations failed to deliver urgent action on fossil fuel phase-outs, as well as various strands of finance. In fact, many have come to question the ability of the UNFCCC process to deliver requisite action in these areas and, as such, momentum has built for focused complementary proceedings. Colombia, in partnership with the Netherlands, announced its plans to host the first international gathering on fossil fuel phase-outs in April 2026 in Santa Marta, Colombia. According to Colombia's Environment Minister, Irene Vélez Torres, the conference aims to deliver "legal, economic and social pathways" for a fair phase-out, and will cover everything from fossil-fuel subsidy reform to labour transition, energy security, and diversification.[32] In this case, COP30 may have initiated new forms of multilateralism – but they could take place beyond the UNFCCC process.

1.4 Growing Risks Post-COP30

Given the outcomes of COP30, and the dynamics outlined above, we identify several risks to global fossil fuel phase-outs:

- **Risk of continued misalignment:** New production licenses will undoubtedly be granted in the months ahead, creating a fundamental misalignment between the required speed and scale of action of the supply-side, and the lock-in of fossil fuel infrastructures. This production gap[33] not only threatens collective efforts to achieve the goals of the Paris Agreement and jeopardises the dwindling carbon budget, it also risks creating a self-reinforcing cycle where fossil fuel expansion is justified by strategic uncertainty, further delaying coordinated phase-outs.
- **Risk to finance:** The absence of dedicated, timely financial commitments for fossil fuel phaseout and just transition measures poses a significant risk – especially in light of accelerating renewable energy generation. Current funding mechanisms remain heavily skewed toward middle- and high-income developing countries, leaving least developed countries (LDCs) and small island developing states (SIDS) under-resourced to navigate the industrial and economic challenges that arise from fossil fuel phase-outs. Without robust financial support, both national governments and local communities may resist or delay phase-outs, exacerbating inequities and climate impacts.
- **Risk to assets, infrastructures and development pathways:** Despite the bullish rhetoric from oil executives and fossil fuel lobbyists at COP30, the fossil fuel industry is heading for a cliff-edge in a world that is unevenly, but undoubtedly, decarbonising. Building out new extraction and refining infrastructure, or locking-in long-term contracts to import fossil fuels, poses risks that could spill over into financial systems. Without international mechanisms for an orderly wind-down, this could destabilise economies and reduce fiscal space for transition investments.
- **Risk to credibility:** Governments continue to signal their ambitions in regard to the energy transition and fossil fuel phase-outs, but practical action remains piecemeal and fragmented. In some cases, policies have actively been rolled back. This risks undermining credibility, leadership and collective efforts to phase-out fossil fuels. For COP30, the emphasis on processes and consultations rather than legally binding obligations risks prolonging the timeline for action, which creates opportunities for countries to defer substantive emission reductions and maintain business-as-usual fossil fuel production. This dilutes the credibility of the COP process.
- **Risk to justice and equity:** The countries most responsible for global heating historically continue to expand fossil fuel production. As a result, these countries are generating mitigation shortfalls that significantly surpass what their legal and moral fair-share responsibilities require.[34] The outcome of COP30 and the latest round of NDCs fails to turn this situation around and deepens the distrust from nations of the Global South that the Global North will deliver on their commitments.
- **Risk of fragmented and overlapping governance:** With multiple overlapping initiatives, including the upcoming Colombia-Netherlands 2026 conference and continued unilateral phase-out policies from states and sub-national governments – the international climate governance landscape is becoming increasingly fragmented. Inconsistent policies, duplication, and loopholes could weaken the effectiveness of coordinated global fossil fuel phaseouts.
- **Risk to the UNFCCC process:** COP30 failed to deliver a roadmap or schedule for phasing out fossil fuels, despite the demands of over 80 countries. Indeed, the COP's persistent failure to address the supply-side poses urgent questions about the framework's ability to deliver and coordinate phase-out efforts within the necessary timeframe, as well as undermining predictability and accountability within the global climate governance system.

[32] Fossil Fuel Treaty, 2025, 'Governments of Colombia and The Netherlands Announce Co-hosting First International Conference on the Just Transition Away from Fossil Fuels as COP30 Text Drops with No Mention of Fossil Fuels', https://fossilfueltreaty.org/first-international-conference
[33] SEI et al., 2025, 'The Production Gap Report 2025', https://productiongap.org/wp-content/uploads/2025/09/PGR2025_full_web.pdf
[34] Civil Society Equity Review, 2025, 'INEQUITY, INEQUALITY, INACTION', https://static1.squarespace.com/static/620ef5326bbf2d7627553dbf/t/691464f5eab4d3550e297795/1762944245866/COP30_Civil_Society_Equity_Review.pdf

2. What COP30 means for the future of phase-outs

Despite the early excitement that COP30 would deliver a breakthrough on fossil fuel phase-outs in the form of a roadmap, the final outcome skirted the crucial issue. In some sense, this is not a surprise – the outcome documents of COPs tend to dilute ambition in pursuit of a consensus based compromise and have historically avoided naming fossil fuels as the primary driver of climate breakdown. While this briefly changed at COP28 with an agreement to "transition away from fossil fuels", COP30 was unable to build on this and reflect the growing momentum behind fossil fuel phase-outs.

Though COP30 clarified the political direction of travel, it left major gaps that countries must fill through national law, finance, coordination and alternative forms of multilateral collaboration.

2.1 Interpretation of COP30 outcomes

The outcomes of COP30 in Belém reflect both the incremental progress and persistent limitations of the UNFCCC process in advancing global fossil fuel phaseouts. While the conference delivered a number of procedural and institutional innovations, the text omitted any explicit commitments to phase down or phase out fossil fuels. This absence is highly consequential: without binding mandates or clear roadmaps, the pace and scale of global fossil fuel reduction remains largely contingent on voluntary action and national political will – a recipe for an uncoordinated and highly disruptive phase-out.

The COP30 dynamics highlight a persistent structural tension at the heart of climate governance. The Brazilian Presidency's strategy of releasing a text skewed toward the preferences of the Arab Group and LMDCs created a mechanism for negotiating compromise, but it also diluted the explicit language on fossil fuel transition.

While the proposed "Belem Mission to 1.5" and similar processes may impact phase-outs, they are inherently non-binding and long-term, offering no guarantee of rapid and managed efforts to cut fossil fuel supply. In short, COP30 institutionalises a framework for discussion rather than a pathway for immediate structural transformation in energy systems.

Finance remains a critical bottleneck. Commitments to triple adaptation finance were pushed back to 2035 and the absence of parallel, dedicated financing for fossil fuel phaseout and just transition leaves vulnerable countries exposed to both economic and social disruption that could ultimately derail their policy ambitions. Without targeted, grant-based and scaled financial flows, countries heavily dependent on fossil fuel production may resist transition measures, slowing global progress.

The outcomes also expose coordination challenges. With the UNFCCC process sidestepping direct fossil fuel mandates, action is increasingly dependent on voluntary coalitions and parallel initiatives, such as the upcoming Colombia-Netherlands 2026 fossil fuel phaseout conference and the Fossil Fuel Non-Proliferation Treaty initiatives. While these fora will complement the UNFCCC, there is a risk of fragmentation and uneven implementation, particularly if major fossil fuel exporters abstain or selectively engage.

Finally, COP30 underscores the risk of continued delay and the urgency of ameliorating it. Technical processes and multi-year 'missions' are valuable for planning and fostering collaboration, but operate on timelines misaligned with the immediacy of climate science. Without accelerated, binding action, global fossil fuel production and consumption are likely to remain locked in, increasing the probability of overshoot and the compounding ecological, social and geopolitical risks that come with it.

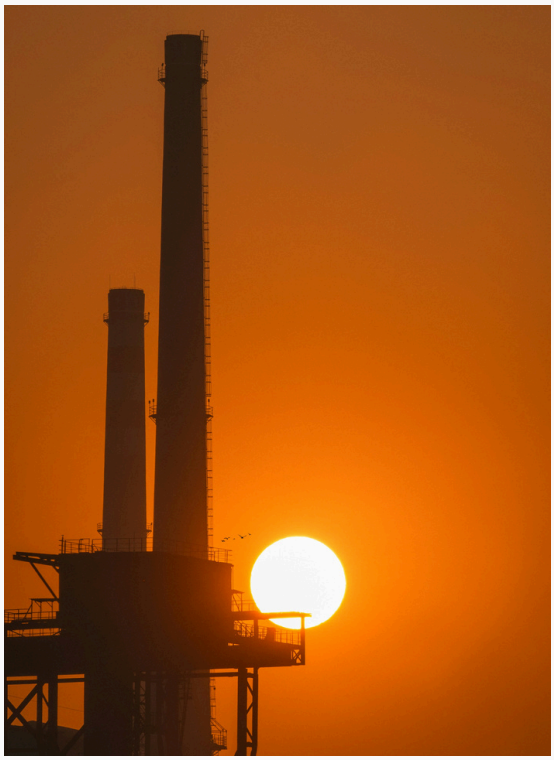
COP30 could be deemed a step forward in terms of the institutional scaffolding of climate governance, but clearly failed in delivering decisive action on fossil fuel phase-outs. The conference highlights that while procedural and consultative mechanisms have value, the global phaseout of fossil fuels will require explicit and binding commitments, predictable and high-quality finance, and coherent global governance – none of which were even partly realised in Belém. The outcomes underscore that the transition away from fossil fuels remains politically contested, financially under-supported, and structurally constrained, leaving the world at risk of climate catastrophe.

2.2 Pathways to embed phase-outs into the UNFCCC

The COP process has the component parts to be a powerful tool for the global phase-out of fossil fuels. For instance, it is possible for Parties to embed fossil fuel phase-outs into the UNFCCC architecture through the formal Nationally Determined Contributions (NDC) process alongside the stocktake mechanism. At the national level, countries can and do incorporate quantitative supply-side targets – such as limits on coal, oil, and gas production – directly into their NDCs. At the global level, these commitments can then be reinforced through the Global Stocktake, creating a recurring accountability cycle that tracks both production reductions and the equitable distribution of transition responsibilities. A further step would be integrating phase-out metrics into just transition finance frameworks to ensure that communities dependent on fossil fuels are supported and that phase-out trajectories remain politically feasible.

COP30 made modest but significant steps toward this embedding. The introduction of the mutirão dynamic brings fossil fuel-dependent economies and supply chains into the center of deliberations, moving beyond the Paris-era assumption that transitions occur largely in parallel and in isolation. By explicitly linking energy systems, trade flows, and technology deployment to mitigation planning, COP30 demonstrates the feasibility of coordinating production-side reductions with broader political economy considerations.

However, the Belem Package stopped short of formalising any binding phase-out commitments. While it establishes frameworks for consultation, transparency, and just transition planning, it does not yet institutionalise fossil fuel phase-outs within NDCs or the core UNFCCC review mechanisms. In effect, COP30 creates the institutional scaffolding necessary to embed phase-out measures, but the substantive and crucial step of translating these frameworks into enforceable obligations remains a critical gap that must be addressed either through future COPs or outside of them.



2.3 Pathways to fossil fuel phase-outs beyond the UNFCCC

Brazil's decision to elevate its fossil fuel phase-out roadmap from COP30 to the G20 underscores a strategic shift in how climate ambition is pursued across the multilateral system.[35] With major fossil fuel producers resisting binding commitments within the UNFCCC process, President Lula's approach reflects a recognition that accelerating the phase-out of fossil fuels requires leveraging multiple political forums, rather than relying solely on COP negotiations.

The G20, as a forum of heads of state who shape global economic governance, offers the potential to secure partial alignment on transition frameworks, creating political space that could influence expectations within the UN process. This is critical given that current supporters of the roadmap account for only 7% of global fossil fuel production; engagement by additional G20 members is essential to achieving global impact.[36]

The emerging multipolarity of geopolitics is reflecting upon climate diplomacy. Economies including China, India, Russia, and South Africa resist uniform phase-out plans but signal openness to nationally determined approaches. This suggests that future progress may rely on a platform-agnostic approach to building capacities, with norms advanced across the G20, G7, regional forums, trade partnerships, and plurilateral initiatives such as the Beyond Oil and Gas Alliance (BOGA) and the Clean Energy Transition Partnership (CETP).

[35] The Guardian, 2025, 'Brazilian president will take fossil fuel phase-out plan to G20 summit', https://www.theguardian.com/world/2025/nov/20/brazilian-president-fossil-fuel-transition-roadmap-g20-summit
[36] Ibid.

The upcoming International Conference on the Just Transition Away from Fossil Fuels, cohosted by Colombia and the Netherlands, exemplifies this complementary strategy. By convening governments, civil society, and technical experts, the conference provides a venue to operationalise phase-out planning, discuss financing mechanisms, and explore concrete pathways for managed fossil fuel decline outside the formal COP process.

Together, these developments signal an emerging strategy in global climate governance: using multiple multilateral venues to build overlapping political pressure, align incentives, and shift the center of gravity toward a rapid, managed, and equitable global fossil fuel phase-out.

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