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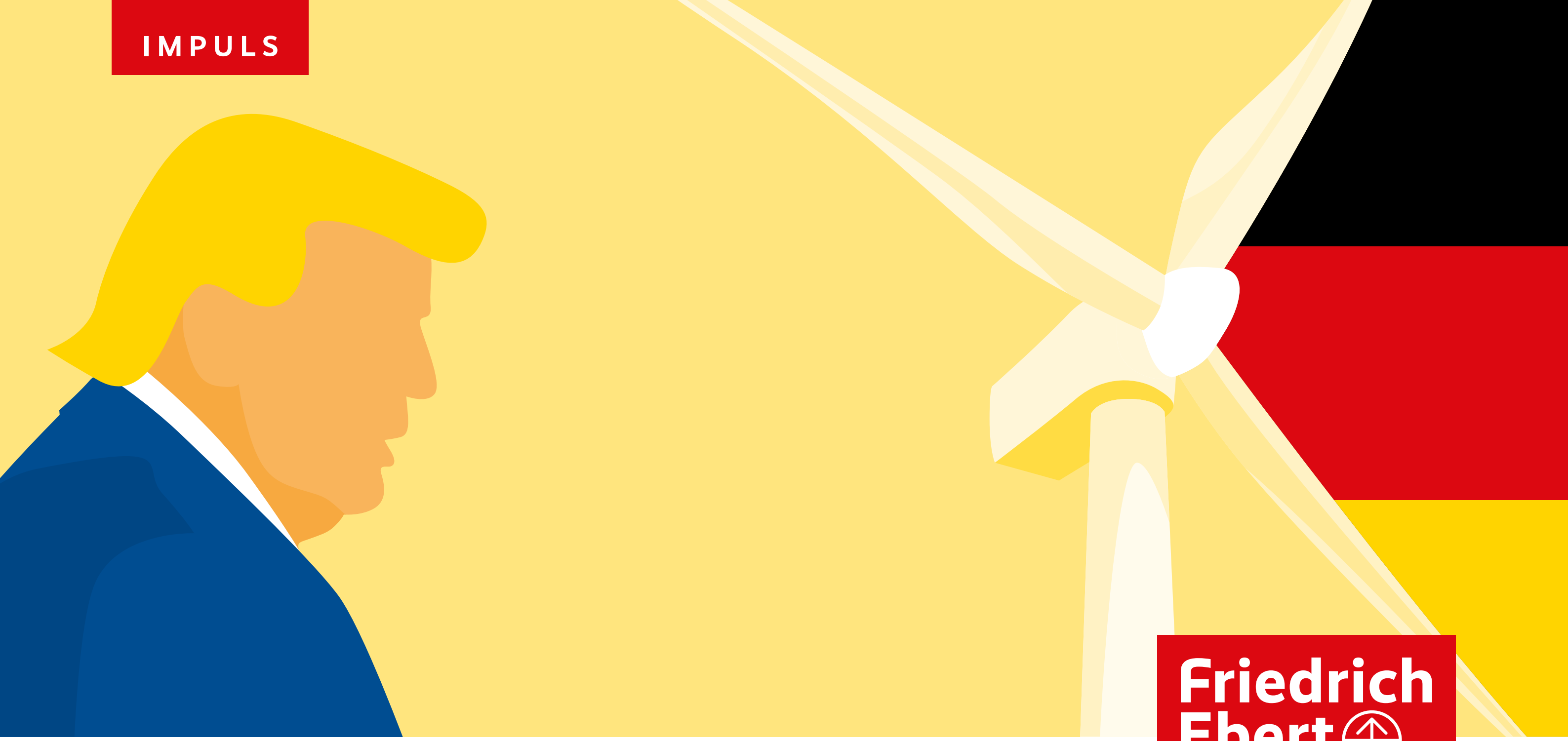

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A New Climate: Germany's policy options in times of Trump 2.0

Energy security, climate protection and industrial competitiveness

At a glance

Germany has maintained its ambitious climate goals under the current government, even if climate policy has come under attack from the standpoint of industrial competitiveness. For many years, Germany had close climate and energy policy ties with the United States of America. Under the second Trump administration, climate cooperation has, however, mostly stopped. The Trump administration's energy dominance strategy focuses on fossil fuel production and exports. Climate policy and cooperation are not regarded as being in the national interest. This paper argues, however, that Germany has a strong political and economic interest in international climate cooperation. The paper frames the growing transatlantic divide in the context of the debate over "electrostates vs. petrostates". It discusses foreign policy interests of electrostates and develops ideas on how to reduce dependence on the U.S. and diversify partnerships to promote a global climate transformation.

1. Introduction: Germany's climate, energy and industrial policy and the role of the transatlantic partnership

Germany has pursued an ambitious climate policy for over two decades. Starting with the first Renewable Energy Sources Act (EEG) in 2000, the country pursued what is now referred to as the Energiewende (energy transition). The goal has been to phase out both nuclear power and coal in the country's electricity mix and to transition away from fossil fuels in overall energy supply. The country's last nuclear plant was shut down in 2023. Germany has, however, been less successful with regard to coal. While more and more EU countries are ceasing coal production, Germany continues to supply half of the remaining amount (Statistisches Bundesamt 2026a). Another issue that has come into focus is the Energiewende's social justice deficit, which can pose a potential risk to the public's acceptance of the policy. Lower-income households produce very low levels of emissions and are particularly vulnerable to price increases related to CO_2 pricing. The government has introduced measures to reduce energy costs for all households (Die Bundesregierung 2026b) but has so far failed to implement the EU's Social Climate Fund, which aims to assist vulnerable households and small businesses.

The energy transition has increased the share of renewables in the electricity mix to 55% as of 2025 (Agora Energiewende 2026). Yet the country is not on track to meet its legally binding climate target of reducing emissions by 65% from 1990 levels by 2030 (Expertenrat für Klimafragen 2025). This is due to transformation challenges in various sectors, including the industry sector.

Germany's climate and industrial policy approach is heavily influenced by the EU's climate and energy policy: In its National Climate and Energy Plan, Germany has pledged to achieve a share of 41% of renewable energy in final energy consumption by 2030 in order to help achieve an EU-wide target of 42%. In the context of the EU's 2030 climate target, Germany is required to reduce emissions that fall under the EU's Effort Sharing Regulation (ESR)[1] by 50% compared to 2005 levels by 2030. The sectors that fall under the EU's Emissions Trading Scheme (ETS 1)[2] require reductions of 62% by 2030 (Bundesministerium für Wirtschaft und Klimaschutz 2024). The EU also determines the permissible scope of state aid for green industries in Germany within its broader climate and industrial policy framework and addresses carbon leakage through measures such as the Carbon Border Adjustment Mechanism (CBAM). Nevertheless, Germany has also pursued its own industrial policy in recent years. This has not gone without criticism, as it risks amplifying inequalities among the EU member states and undermining the Single Market. For instance, to increase industrial competitiveness, Germany has introduced carbon contracts for difference (CCFD), tax breaks and an industrial electricity price. The country's industrial policy also has a foreign policy dimension, with Germany holding various bilateral hydrogen partnerships, for example. These are aimed at supporting industrial transition.

Germany's climate policy debate has shifted markedly in recent years. When it entered into office in 2025, the current German government emphasised competitiveness as well as the need for climate policy pragmatism and flexibility. It has questioned the current approach to expanding renewables (Bundesministerium für Wirtschaft und Klimaschutz 2025), called on the EU to soften the impact of the ETS on industries such as chemicals (ntv 2026) and updated legislation for the buildings sector to enable fossil-based heating systems for a longer period of time (Bundesministerium für Wirtschaft und Klimaschutz 2026). All in all, the current government shows considerably less commitment to achieving the country's legally binding climate targets than the previous governing coalition. This is despite the fact that the German Federal Constitutional Court ruled in 2021 that the German government must set more stringent measures after 2030 to achieve climate neutrality.

The transatlantic relationship has traditionally played a very important role for Germany in most policy areas, including climate. The U.S. has long been Germany's second largest trading partner after China (Statistisches Bundesamt 2026b). Exports to the U.S., however, decreased by some 10% as a result of the Trump administration's trade policy in 2025. Relationships in the climate and clean energy sphere have also shifted markedly. The past 25 years have seen several ups and downs in U.S. climate ambition. But even in times when (mostly Republican) presidential administrations had limited interest in climate policy, Germany and the U.S. continued to cooperate in international fora such as the United Nations Framework Convention on Climate Change (UNFCCC) and the International Renewable Energy Agency (IRENA). The Biden Administration in particular saw new cooperation formats come into being: The Just Energy Transition Partnerships (JETPs) aim at supporting the transition away from coal in select emerging markets. The Climate Club seeks to boost industrial decarbonisation, especially in the steel and cement sectors (Unger and Thielges 2025). In 2021, Germany and the U.S. agreed a bilateral energy and climate partnership (*USA Germany Climate and Energy Partnership (CEP)*, 2024). The Trump administration has announced its withdrawal from most international climate-related agreements. The bilateral climate and energy partnership now exists on paper alone. The only active bilateral initiative is the Transatlantic Clean Economy Bridge (TCB), which fosters subnational dialogue between actors from Germany, the U.S. and Canada (Clean Economy Bridge 2026). Despite the policies of the Trump administration, many of the U.S. states remain committed to net-zero targets.

The one area where the U.S. and Germany have continued to grow closer together under the Trump administration is in fossil fuels. Under the Biden Administration and in the wake of the war in Ukraine, the U.S. became a major supplier of liquefied natural gas (LNG) to Germany. In 2025, the U.S. supplied 95% of Germany's LNG imports (SMARD 2026). German trade-related dependencies from the U.S. thus remain high overall.

1 E.g. small industries, buildings, transport

2 E.g. electricity and heat generation, energy-intensive industries

2. Drifting apart: Diverging transatlantic climate interests

With regard to the climate transformation, U.S. and German interests have moved in opposite directions since Donald Trump's second term began. Despite the somewhat reduced climate ambition of the current government, Germany arguably still has a strong interest in the climate transformation: As a fossil-fuel-poor country that imports the vast majority of its oil and gas, Germany intrinsically benefits from the transition to renewable energy sources in that this will reduce its import dependence and exposure to global fossil fuel price volatility. These energy transition interests align with the objective of a net-zero industrial sector and are further amplified by the climate targets set out in the German Federal Climate Change Act as well as Germany's continued commitment (*Koalitionsvertrag von CDU, CSU und SPD*, 2025) to the temperature goals of the Paris Agreement.

An interest in international climate cooperation follows from these considerations. A global shift in energy systems towards clean energy is expected to lower costs for clean energy technologies and reduce global emissions, thereby aligning with Germany's domestic interests. Moreover, cooperation can help ensure fairer international market conditions for German industry, for instance by promoting the convergence of green product standards or by facilitating the introduction of carbon pricing. The creation of green international markets securing supply chains and demand for Germany's low-carbon products also requires cooperation with like-minded countries and is essential to the competitiveness of German industries.

Energy and climate policy in the U.S. is quite different. The fracking-boom that took off in the late 2000s has made the U.S. the world's biggest oil and gas producer and a major fossil fuel exporter. The Trump administration is not bound by climate legislation and has weakened or abandoned its predecessors' climate regulation (Weltenergierat 2025). In exiting the Paris Agreement and announcing its withdrawal from the UNFCCC, the country will also no longer be bound to global temperature targets. Despite its vast fossil fuel resources, the U.S. has also been a clean tech leader and has built up significant capacities in renewable energy and related technologies such as battery storage. These were supported under the Inflation Reduction Act adopted during the Biden Administration. Donald Trump, nevertheless, mainly regards a fossil fuel-based energy system as the main strategic goal of the U.S. This drives his "energy dominance" strategy, which emphasises the importance of expanding fossil fuel production and exports, reducing regulatory and financial support for clean technologies such as wind and electric vehicles and reviving nuclear energy (The White House 2026). This also has foreign policy ramifications. The Trump administration has no interest in a global transition away from fossil fuels or the creation of green international markets. Its energy strategy suggests an interest in cementing fossil-fuel based energy and economic systems, preventing further climate policy progress and undermining existing international climate ambitions. This is evident in Trump's use of tariffs and economic sanctions to put pressure on the EU and other countries to weaken climate measures and commit to more fossil fuel imports from the U.S. (Adolphsen and Thielges 2026). Under the Trump administration, the climate, energy and industrial policy interests of Germany and the U.S. thus appear largely irreconcilable.

3. The road towards becoming an electrostate: International climate policy resilience and economic resilience: Two sides of the same coin for Germany

On a conceptual level, Germany might be characterised as a potential "electrostate" with interests in stark contrast to the U.S. as a "petrostate". Electrostates strive to phase out fossil fuels and promote electrification in the industrial, transport and buildings sectors. This is paired with a high degree of digitalisation (Mitrova and Corbeau 2025). China is usually cited as the prime example of an electrostate due to its high share of electric vehicles, rapid capacity expansions for renewable energy and dominance in many cleantech supply chains and products (Reid 2025). Defining an electrostate purely in terms of a low-carbon energy system and a strong shift towards electrification currently has limited usefulness, however. It is true that there is no perfect electrostate at present. *All* states are still highly dependent on fossil fuels – if not in their electricity mix, then in areas such as industrial production, heating, cooling, cooking and military capabilities. Labelling a country (or a group of countries, such as the EU) as an electrostate is thus rather aspirational. This may warrant a broader definition, which includes a strong commitment to achieving a net-zero economy within a set timeframe (e.g. by 2050). Motivations for this commitment may range from climate protection to the reduction of import dependencies, as well as fostering local green value chains for competitiveness and/or green development. Under the current government, Germany's motivation to become an electrostate may be driven more by the latter factors, as climate ambition is waning.

Electro-states, in this context, share an interest in largely phasing out fossil fuels in order to succeed in achieving net-zero economies. If the petrostate economic model prevails internationally, however, this limits economic opportunities for electrostates and causes severe climate change-related effects that create further socioeconomic strains, especially for the developing world.

The electrostate status is thus also tied to foreign policy demands. An electrostate foreign policy becomes a necessity in order to accompany the transformation and mitigate risks related to both the energy transformation and climate change. One major aspect of this electrostate foreign policy is international coordination and cooperation. If Germany, the EU and China remained the only electrostates, their clean industries would be unlikely to continue to thrive.

Market opportunities would, however, grow along with the number of additional electrostates. Cooperation to incentivize and facilitate the transformation in existing international initiatives and fora, such as the UNFCCC, the Climate Club or Mission Innovation is therefore key. Moreover, a lack of coordination risks exposing industries to a highly fragmented system of trade barriers such as a patchwork of definitions for low-carbon products and countervailing tariffs. Reducing these barriers, at the very least, could accelerate the transition. An electrostate foreign policy must also navigate dependencies on petrostates for (cheap) fossil fuels in the medium-term. Countries like Germany continue to rely on benevolent relationships with petrostates and especially the U.S.

Given the seemingly irreconcilable transatlantic climate and industrial policy interests, as well as continued energy-related dependencies between the U.S. and Germany, it becomes increasingly important for Germany to send a clear signal and strategically position itself as an "electrostate" in the international realm. This means carefully choosing partners and alliances to promote the climate transformation while fending off attacks on international climate policy initiatives by the Trump administration.

4. Recommendations

Strengthening EU climate and clean industry efforts

On its pathway towards becoming an electrostate and in its efforts to address U.S. petrostate foreign policy, Germany depends highly on the EU. The EU in itself provides a market for clean products and is, due to its size, a considerable source of international soft power. Yet, given the challenges faced by its energy-intensive industries, the German government has recently called key climate policy instruments of the EU into question, in particular the ETS. It has requested a continuation of free allocation of emission certificates for select industries. The German government was also a major driver in introducing flexibilities into EU climate policy targets for 2040. EU climate policy has already faced major headwinds in the past months, resulting in the delay of ETS 2 and the Corporate Sustainability Due Diligence Directive (CSDDD). The EU was only able to submit its Nationally Determined Contribution (NDC) to the UNFCCC days before the climate conference in Belém. In its approach to the EU, it will be important for Germany to keep an electrostate vision in mind and not to focus solely on the questionable short-term gains of weakening the EU's climate policy instruments. Germany's economy benefits greatly from a strong EU.

Diversification of climate and economic partners in the Global South

An important strategy for Germany is also to diversify its political and economic relationships. Many Global South countries have great potential for Germany as climate partners, future clean-tech markets and potential electrostate allies. A majority of Global South countries have committed to net-zero emissions targets under the Paris Agreement. This aligns their interests more closely with Germany than the U.S. As partners, many developing countries, particularly African countries such as Nigeria, Tunisia or Kenya, stand out with unique electricity system features: In contrast to the Global North countries, many electricity systems in African countries are fully or nearly coal-free (Our World in Data n.d.). Achieving net-zero economies for these countries does not require a transition away from coal-based, emission-intensive power systems. The task is instead to develop a reliable low-carbon electricity supply and green value chains in the first place. Germany can continue to support this, on the one hand, through its development policy, which explicitly targets challenges such as developing green electricity systems, increasing energy efficiency and local value creation. On the other hand, Germany can increasingly engage these countries in collaborative efforts such as the Climate Club, which seeks to foster international industrial decarbonisation, for instance by creating common international standards for green steel and cement.

The relationship to China, Germany's most important trade partner, is of particular importance, as well. At a time of diverging transatlantic interests, closer ties to China warrant discussion. However, it stands out with complex features and challenges as an electrostate partner. In contrast to the above-mentioned coal-free states, China still struggles with a considerable coal dependence in its electricity system which is a major driver of its immense emissions. At the same time, China dominates many important supply chains in the net-zero sector, including critical raw materials, batteries or photovoltaic (PV) cells. Like most countries, Germany is highly dependent on China for its climate transformation. Aggressive industrial policy, often based on massive subsidies have furthermore made Chinese products highly competitive in international markets and led to significant overcapacity in various industries in China, including steel, chemicals and electric vehicles (EVs). This overcapacity has been flooding international markets, thereby reducing the competitiveness of industries in Germany and elsewhere (Merics 2026). German exports to China have declined significantly over the past three years, with particularly sharp declines in the automotive sector. Moreover, China has begun to take over third-country market shares from Germany in clean technology and other products (Barkin and Williams 2026). Therefore, China merits a different kind of partnership than other Global South countries. Bilateral collaboration with China needs to focus on addressing overcapacities in order to enable the economic success of the climate transition in Germany. This must be done primarily through the EU through measures to restrict Chinese access to the European market (e.g. through local content rules and rules on joint ventures proposed in the EU's Industrial Accelerator Act) and to scale up critical raw materials production and processing. Moreover, although doing so may be highly challenging, efforts must continue to engage China in international formats to promote common standards and definitions for green products with the aim of reducing trade barriers.

Another Global South example is India, which will also play a crucial role in Germany's electrostate foreign policy. Even more so than China, India has a highly coal-based electricity system. It is not on a net-zero pathway yet but has strong ambitions to become a leader in areas such as green hydrogen, low-carbon steel and solar manufacturing. There is therefore considerable alignment with German interests. India is also one of the biggest global steel and cement producers. The German government has made an effort to deepen its ties with the Indian government, among other things, to collaborate on topics including digitalisation and critical minerals (Die Bundesregierung 2026a). India again provides an opportunity for continued use of development policy instruments to support decarbonisation in the electricity and industry sectors and to work together to create fair global green market conditions. Including India in initiatives such as the JETPs and the Climate Club has proven difficult. But Germany can support existing efforts such as LeadIt, a public-private alliance launched by India and Sweden in 2019. It focuses on supporting emerging economies in accelerating the industrial transition.

Closer collaboration with the Global South can help reduce economic and political dependence on the U.S. in the climate, energy and economic spheres. It can, moreover, increase supply chain resilience for Germany: As green industrialisation progresses, Germany can potentially source both raw materials and semi-finished products from its Global South partners, thus reducing overall production costs for final products in Germany, such as vehicles (Potsdam Institute for Climate Impact Research, 2024). Building such collaboration may, in turn, put Germany in a position to make stronger political demands vis-à-vis the U.S. if the U.S. wants to maintain its partnership with Germany.

Maintaining ties with U.S. subnational partners

Cooperation with U.S. states, cities and non-state actors can be another meaningful pillar of Germany's electrostate foreign policy. Continuing climate collaboration with those U.S. subnational actors that remain committed to net-zero targets remains a win-win strategy for Germany. This can help counter the fossil fuel agenda of the Trump administration and support the spread of renewables and clean technologies, despite federal policy. At the state level, it is mostly states led by Democratic Governors who continue to innovate in the climate space. Minnesota, Michigan and North Carolina have all recently set more ambitious targets for renewables. Virginia passed a law in 2021 which sets a net-zero emissions target for the state to be achieved by 2045 (Code of Virginia 2021). In 2026, it plans to return to the Regional Greenhouse Gas Initiative – a regional cap-and-trade scheme for the electricity sector (Larsen 2026). California and Hawaii both have targets for 100% renewable electricity in the electricity mix by 2045. There is therefore a great deal of alignment with Germany's interests.

Collaboration with these states through initiatives such as the Clean Economy Bridge and further alliances such as the Under2 Coalition (Climate Group 2026) is an important political signal. The Trump administration has been pushing back against state-level climate activities. It has, for instance, cut funding for clean energy projects, particularly in Democratic-led states (Plumer 2026) and has rescinded a waiver previously granted to California to set its own ambitious vehicle emission standards (Seyfarth Shaw 2025). It has also threatened legal action against California's cap-and-trade system (The White House 2025). As the Trump administration has effectively barred the U.S. Environmental Protection Agency from regulating greenhouse gas emissions, some experts see potential for states to step in and introduce more ambitious climate regulations themselves. There is thus some hope that states might become more active as a result of Trump's anti-climate agenda (Beane and Gross 2026).

List of Acronyms

CBAM	Carbon Border Adjustment Mechanism (EU)
CCFD	Carbon Contracts for Difference
CSDDD	Corporate Sustainability Due Diligence Directive
EEG	Renewable Energy Sources Act
ESR	EU Effort Sharing Regulation
ETS	EU Emissions Trading System
IEA	International Energy Agency
IRENA	International Renewable Energy Agency
JETP	Just Energy Transition Partnership
LNG	Liquefied Natural Gas
NDC	Nationally Determined Contribution
PV	Photovoltaic
UNFCCC	United Nations Framework Convention on Climate Change

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