



European
Climate
Foundation

Annual Report 2025

Keeping the Spirit of the Paris Agreement Alive

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A Letter from Kate Hampton, Chair of the Supervisory Board

It is a privilege to introduce the European Climate Foundation's 2025 Annual Report.

2025 was another demanding year for climate action. Progress in the real economy continued, but the political consensus behind it became more contested in an increasingly unsettled international context.

Philanthropy has a particular role to play in moments like this: supporting civil society through uncertainty, holding firm on work that may be difficult, and helping maintain focus when short-term pressures pull in other directions.

The ECF is a linchpin, a critical voice across Europe and beyond. Its strength lies in connecting a diverse community across countries, sectors, and different parts of society. The stories in this report are a testament to what can be achieved when that community works together, even in a more difficult environment.

Seeing the dedication, innovation and determination of the ECF's staff and leadership up close, I have every confidence that the organisation will continue to shape policy and European society in the years to come.

On behalf of the Supervisory Board, I would like to thank all those who have contributed over the past year. I look forward to continuing this work together. I would particularly like to express my gratitude to the CEO, Laurence Tubiana, as she completes her decade at the helm of ECF, as a relentless champion of the spirit of Paris — a moment that reminds us of what humanity can achieve when acting in unison, and the role Europe has and can still play in protecting people, planet and prosperity.

Kate Hampton



A portrait of Laurence Tubiana, an older woman with short white hair, wearing a dark blue jacket and a colorful beaded necklace. She is looking directly at the camera with a slight smile. The background is a solid mustard yellow.

A Message from Laurence Tubiana, CEO

In 2025, we marked ten years since the adoption of the Paris Agreement — a moment that changed the course of global climate action.

A decade on, it has become a reference point for economic decisions, political choices, and for citizens around the world. Clean technologies are increasingly the most cost-effective option, investment is shifting, and net-zero targets now cover the vast majority of global emissions. The direction of travel is no longer in question.

In 2025, that progress continued, quietly. Renewables provided nearly half of EU electricity. Long-standing bottlenecks, such as electricity grids, are finally receiving the political attention they require. Internationally, cooperation remains possible, even in a fractured context. At COP30, over 85 countries joined together to demand a roadmap on transitioning away from fossil fuels. Eighty-five countries is not a consensus, but it can still make a real difference in moving the agenda forward.

At the same time, the political environment has become more contested. Debates around security, the cost of living, and the future of industry are reshaping the terms of the transition across Europe. We are increasingly seeing organised opposition — working to dismantle the framework built over the past decade in line with a very different vision for Europe.

We know that we are entering a more demanding phase of the transition. It reaches further into the structure of our economies — industry, transport, buildings, land use and the systems that connect them — and raises harder questions about inequality, who pays, who benefits, how we invest, and how people's lives are affected. Delivering that transformation in a more contested environment will be tough.

Yet public support remains fundamentally strong. Surveys continue to show that citizens expect climate action. But the question people are asking is whether the transition will deliver in practice — in lower bills, stable jobs, and greater resilience to shocks.

Answering that question is now central to maintaining momentum.

This is also a test for international cooperation. The Paris Agreement has proven resilient, but the way it operates is evolving. Progress will increasingly be driven by coalitions of countries, sectors, and institutions moving forward together, rather than by uniform global alignment. Europe can and must remain a central actor in this landscape. Its choices continue to shape markets, policies, and expectations well beyond its borders. What Europe does — or fails to do — has consequences around the world that extend far beyond its own greenhouse gas emissions.

In this context, the ability to connect action across levels — from local and national efforts through to European and international frameworks — matters more than ever. It is what allows progress to be sustained, even as conditions become more volatile. This is where the work of the European Climate Foundation and its partners is focused. In 2025, we continued to support this collective effort: strengthening coordination across

countries and sectors, anticipating political and economic shifts, and ensuring that the transition delivers for people.

A strong and resilient civil society is vital at times like this — and our ability to work together will be decisive. In a community as interdependent as ours, we are only as strong as the connections between us. Different parts of the ecosystem bring different strengths, and we need all of them aligned and working together.

When we do, we are better able to absorb shocks, adapt, and keep moving forward. That is how the gains of the past decade will be protected and built on.

I consider it a privilege to be part of this community, and to work alongside so many inspiring and committed people across Europe and beyond.

A handwritten signature in dark ink, appearing to read 'Laurence'.

Laurence Tubiana



2025 in Review

Keeping the Spirit of the Paris Agreement Alive

Ten years after the Paris Agreement was adopted, climate action remains essential, but the context for delivering it has become more demanding. In 2025, economic pressure, geopolitical instability, and a more polarised public debate created a tougher environment for progress in Europe and beyond.

Questions about affordability, competitiveness and energy security shaped many policy debates. At the same time, climate impacts continued to intensify, underlining the need for practical solutions that can reduce emissions, strengthen resilience and support economic stability.

Despite these challenges, 2025 also showed that progress can continue when institutions, civil society, researchers and practitioners work together. Throughout the year, the European Climate Foundation (ECF) supported efforts that helped sustain momentum, share evidence, and strengthen cooperation across different parts of the climate field.

©Giorgio Salimeni / Cesura

At the European Climate Foundation (ECF), we contribute to this work in four complementary ways:



As a **strategic grantmaker**, we provide funding to organisations driving climate action across Europe and internationally, strengthening their capacity to deliver sustained impact.



As a **network enabler**, we connect actors across countries, sectors, and disciplines, fostering alignment and joint action.



As a **narrative shaper**, we create positive public messaging around the transition to a just, stable and net-zero society, expanding the range of voices shaping public debate.



As a **thought leader**, we systematically back analysis and strategic foresight to anticipate emerging challenges, test new approaches, and help the ecosystem navigate change with clarity.

Together, these activities help support climate action that is practical, collaborative and responsive to changing conditions.

The ECF's Approach to Learning & Impact

In 2024, the ECF set out a Learning & Impact vision to guide how it uses evidence and learning to improve its work and allocate resources responsibly.

This vision is anchored in three key goals:

1

Understand and measure impact

We identify effective interventions in complex systems so we can back the processes that drive real change.

2

Systematise collective learning

We build a collaborative culture that enables high-trust partnerships and effective knowledge sharing.

3

Foster an evidence-based culture

We ground decisions in quality data by reviewing our work and partners' contributions to continuously refine our approach.

We track impact at three levels: wider system change, the ECF's contribution, and partner progress. In 2025, we improved this approach through more regular reviews, clearer decision points, and shared tools to help teams respond to change and refine their plans.



Sharing our Learnings to Drive Collective Change

With donor support, we help strengthen climate action by funding partners, bringing organisations together, and sharing learning across the wider field. This section summarises what we learned in 2025 through our four roles: strategic grant-maker, network enabler, narrative shaper, and thought leader.

In a difficult year, we focused on practical, collaborative ways of working and on learning what helps partners operate effectively in changing conditions.

Our rapid response workshops helped partners strengthen their communications and align talking points in fast-moving public debates.



AS A STRATEGIC GRANT-MAKER

In 2025, we continued to fund a wide network of more than 600 partners.

Our approach in 2025

We work with grantees across 60 countries, including civil society groups, think tanks, research bodies and coalitions. This range helps us spot administrative friction points and prioritise where support is most useful.

In 2025, we kept working towards clearer expectations and lighter processes where possible, so that partners could focus more on delivery. With an average grant size of €118,000, this meant keeping requirements proportionate to the support provided.

Amid political and funding shifts, we welcomed 206 new grantee partners and kept adapting our support to changing conditions. The year reinforced a few practical lessons: coordination across sectors is now essential, clearer priorities help partners focus, long-term support enables durable change, and local context often shapes where progress is possible.



AS A NETWORK ENABLER

Alongside grant making, we support the wider ecosystem by helping organisations build capacity, connect with peers, and work together where needed.

Our approach in 2025

In a tougher political and funding environment, this support became more systematic. We expanded organisational development support to more than 75 organisations, increased training and peer-learning, and tested country-level approaches that combined tailored support for key organisations with services to the field for the wider ecosystem.

We also brought partners together to improve coordination and help them work in contested contexts. Experience from 2025 showed that practical support works best when it is adaptive, grounded in trust, and balanced between in-depth help for some organisations and lighter support for the broader network.



AS A NARRATIVE SHAPER

We use communications to inform public discussion, support partners, and make complex climate issues relevant for wider audiences.

Our approach in 2025

In 2025, we relied more on audience research, media analysis and partner insight to help shape timely, relevant communications.

Initiatives like our Earthstronauts project continued to build storytelling skills across the network, helping partners communicate through everyday experience rather than specialist policy language. Work in Germany also showed the value of simpler, clearer public explanations of national climate commitments.

In transport, public polling and media analysis suggested that support for change is stronger when people see policies as fair and practical. More broadly, the year showed the importance of understanding audiences, working with a wider range of trusted voices, and preparing partners to respond quickly when public debate shifts.



AS A THOUGHT LEADER

We help partners share ideas, compare evidence and plan together by convening different actors and providing analysis on emerging issues.

Our approach in 2025

In 2025, we continued convening work to bring key topics like clean industry to the fore of the policy debate, while helping organisations align around shared issues and priorities.

We also strengthened our foresight work to help the climate ecosystem prepare for the future. This included scanning developments, exploring different scenarios and turning those insights into briefings and workshops that could support planning.

Across this work, 2025 reinforced the importance of timing, trusted relationships and clear preparation. It also showed that convening is most useful where issues overlap and different actors need a shared understanding of the choices ahead.

Looking ahead

A key lesson from 2025 is the value of making clear choices when there are trade-offs. And, in focusing that effort, we must prioritise working across connected issues.

The next phase of the transition will be defined by contestation — on energy, industry, nature, mobility and climate finance. We will respond by applying what we have learned to support practical, coordinated progress. Our four roles — grant-making, convening, communications and

analysis — are closely interconnected: funding enables partner work, communications help surface insights, and convening and analysis support shared understanding and alignment across the ecosystem.

This is how we strengthen the conditions for more informed decision-making and help advance a transition that is both ambitious and grounded in real-world delivery.



European and National Just Transitions

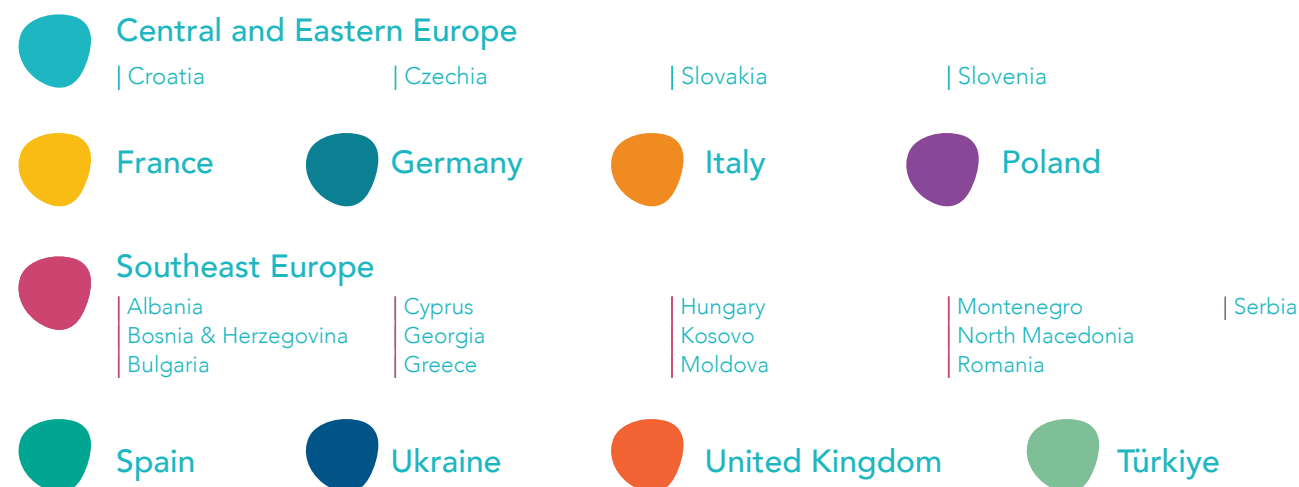
Supporting fair and practical climate delivery across Europe

In 2025, the next phase of Europe's climate transition became clearer. Work began on the EU's 2040 climate target and on the next long-term EU budget, both of which will shape whether climate ambition is matched by the investment, policy tools and public support needed to deliver it.

Across Europe, debates on climate policy were increasingly tied to jobs, affordability, industrial competitiveness and energy security. This reinforced the need for climate solutions that are credible in local and national contexts, not only at EU level.

The ECF's European and National Just Transitions portfolio works across EU and country levels to help climate action remain both ambitious and deliverable. In 2025, this meant supporting analysis, public-interest advocacy and collaboration that connected European frameworks with national realities, including the pressures facing households, regions and local industries. The aim was to help keep climate policy grounded in practical delivery and long-term public benefit.

Countries and regions we operate in



Key developments in 2025

EU level

Keeping climate ambition politically workable

As parts of the European Green Deal came under renewed political pressure in 2025, the ECF supported partners working to show how climate policy can also respond to wider concerns about competitiveness, energy costs and economic resilience. This helped keep climate action connected to the practical choices facing governments and institutions, rather than presenting it as separate from wider economic priorities.

Helping sustain support for the EU's 2040 climate target

One major milestone in 2025 was the agreement on a 2040 target of 90% net emissions reductions. Throughout the year, ECF-supported organisations contributed evidence and policy input showing how this target could be linked to cleaner industry, electrification and energy security. The result was an important signal that long-term climate direction in Europe remains intact, even in a more contested environment.

Using independent evidence to track delivery

To support implementation, the ECF continued backing the European Climate Neutrality Observatory (ECNO), which provides independent assessment of Europe's progress towards climate neutrality. In 2025, ECNO's third flagship report offered a cross-economy picture of where progress was advancing and where gaps remained, giving policymakers, civil society and media a clearer basis for debate at a time when delivery questions were becoming more urgent.



Scenario exercise on responding to misleading claims about renewable energy.

Country spotlights

The Iberian Peninsula energy blackout: a wake-up call for Europe

In April 2025, Spain and Portugal experienced a major power blackout that triggered public debate about the role of renewables. As misinformation spread, our network of partners helped bring credible expert analysis into that debate. When investigations later pointed to failures in voltage control rather than renewable generation, the episode underlined the need for stronger grids, system flexibility and better preparedness as clean electricity becomes more central to Europe's energy mix.

Putting Poland’s wind energy future on the map

In Poland, offshore wind moved further into the mainstream of national industrial and energy planning. ECF partners, including the Wind Industry Hub, helped show how offshore wind can support energy security, domestic industrial capacity and long-term investment. By the end of 2025, Poland had become one of the EU’s most significant emerging offshore wind markets, with 5.9 GW of projects under development.



Making the benefits of climate action more visible in the UK

In the UK, 2025 was the first full year of a new government that brought renewed momentum on clean power and climate diplomacy, but also faced political polarisation and cost-of-living concerns. ECF-supported partners such as The Local Storytelling Exchange and Round Our Way helped bring local experience into the wider debate, including positive stories about jobs, energy bills and climate impacts. By making the transition more concrete and relatable, this work helped strengthen public understanding of what climate action can mean in practice.

From grid infrastructure in Scotland and Suffolk, via low-carbon apprentices down the UK’s east coast and farmers supporting community energy in the southwest, the Local Storytelling Exchange (LSE) puts local voices at the heart of nationally significant stories. Credit: LSE / Ashden / Equinor





International

Sustaining international climate cooperation in a more fractured world

In 2025, international climate cooperation continued under more difficult conditions. Geopolitical tensions, trade disputes and growing pressure on multilateral institutions made collective progress harder, even as the need for practical implementation became more urgent.

The ECF's International portfolio works across diplomacy, trade, finance and implementation to help sustain progress under the Paris Agreement and support Europe's role in wider climate cooperation. In 2025, this included work to strengthen multilateral engagement, support credible climate leadership, and encourage practical collaboration among national and subnational actors.

Key Developments in 2025

A strong presence at COP30

The 30th Conference of the Parties (COP30) in Belém, Brazil, was widely seen as an "implementation COP", reflecting the need to move from targets to delivery. On the tenth anniversary of the Paris Agreement, it also became a moment to reaffirm that international cooperation on climate remains possible. In 2025, the ECF supported engagement throughout the COP30 cycle, including work that helped keep adaptation, resilience and implementation high on the international agenda. Our CEO Laurence Tubiana's role as Special Envoy, Europe, also helped maintain visibility and momentum around Europe's contribution to the wider process.



(Left) Members of the Regional Climate Foundations, of which ECF is a part, came together under a shared pavilion in Belém, Brazil. (Right) ECF CEO Laurence Tubiana addressed the media at COP30 in her role as Special Envoy, Europe.

Supporting Europe's global climate role

Throughout the year, ECF partners contributed to debates on the EU's external climate role, including trade, industrial policy and the preparation of its net-zero-aligned Nationally Determined Contribution (NDC) for 2035. This work helped reinforce the importance of linking Europe's domestic transition to a credible international offer, including on implementation, fairness and clean industrial development.

Building practical coalitions where formal consensus is harder

As multilateral negotiations became more complex, practical cooperation outside formal consensus processes grew in importance. One example was the Global Solidarity Levies Task Force hosted by the ECF, which brought together governments and experts from the Global North and Global South to develop options for raising additional finance from undertaxed and high-emitting activities like premium air travel. By 2025, this work had helped move solidarity levies further into the mainstream of international climate and development finance discussion.

Spotlight

Building climate leadership beyond national governments

As international cooperation becomes more complex, cities, regions and parliamentarians are playing a more visible role in sustaining climate momentum. In 2025, the ECF supported partners working with these actors across Latin America, Africa, South Asia and the MENA region, alongside the work of our country programmes in Europe, helping strengthen climate leadership and implementation capacity beyond national governments alone.

This included support ahead of COP30 in Brazil to raise the profile of subnational and parliamentary engagement under the UN climate process. By strengthening links between local delivery, national planning and international visibility, this work helped broaden the range of actors contributing to implementation and showed how climate action can continue to move forward even when formal processes are under strain.



The ECF's International Climate Policy Hub held working group strategy sessions in March 2025. Left, the working group meeting in Ethiopia. Right, the session in Indonesia.





Citizen Engagement & Cultural Change

Strengthening democratic support for climate action in a polarised public sphere

Climate politics increasingly played out as a contest over trust: fragmented media, fastmoving misinformation, and declining confidence in institutions made it easier to polarise communities and harder for policymakers to sustain consent for delivery.

The ECF's Citizen Engagement & Cultural Change portfolio works to help climate action remain connected to people's concerns and democratic debate. In practice, this means supporting public-interest communications, strengthening the use of reliable data on attitudes and priorities, and working with a broad range of voices so climate solutions can be discussed in ways that are relevant, practical and grounded in everyday experience.

Key developments in 2025

Supporting public-interest climate communication in a fast-moving media environment

In 2025, the ECF supported partners working to keep climate issues visible and well-informed in a fragmented media landscape. This included helping journalists and broadcasters access credible experts during major news moments, as well as backing work that brought climate themes into wider cultural spaces beyond traditional policy or news coverage. Examples included high-profile entertainment formats that featured clean energy and electrification in everyday settings, and documentary storytelling that focused on practical responses to the climate crisis.



Cooking with induction stoves, electrification takes centre stage in the reality TV competition MasterChef.



Launch of Hope!, a Spanish documentary series about solutions to the climate crisis.

Strengthening national insight and public understanding

Another priority in 2025 was improving the evidence base on how people view climate action and related policy choices. The second wave of the ECF’s public opinion barometer, delivered with Focal Data, provided comparable cross-country insight into public attitudes on climate measures, trade-offs and solutions. This helped partners and stakeholders better understand where support is strong, where concerns are emerging, and how to keep climate policy connected to lived experience.

Encouraging broad-based support across the political spectrum

In several countries, our network also supported organisations that helped keep climate action part of mainstream economic and social debate. ECF partners in countries including France, Spain and Germany contributed analysis and commentary that linked climate progress to issues such as competitiveness, economic responsibility and long-term stewardship — helping sustain cross-partisan engagement at a time of growing polarisation.



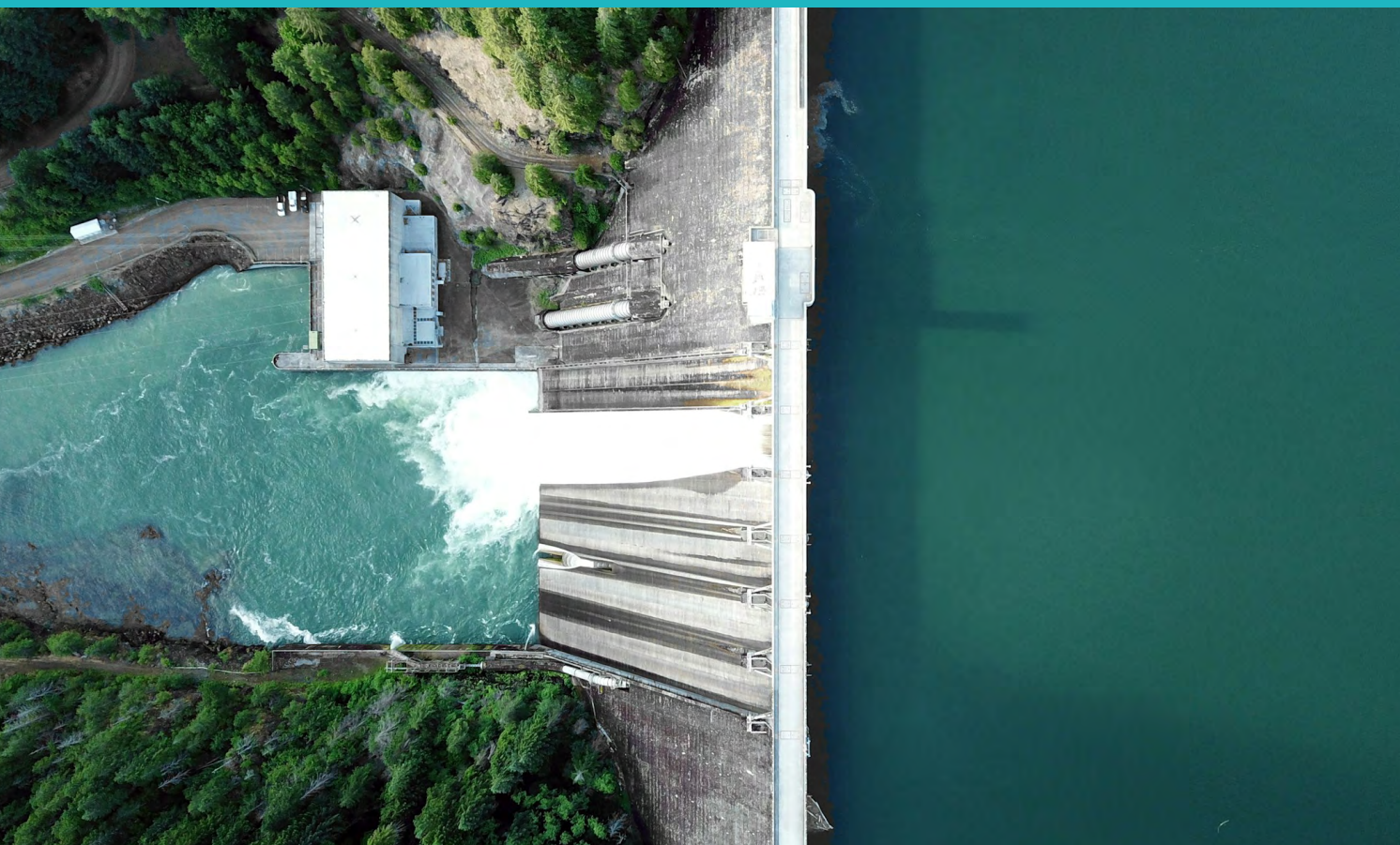
Homeowners are not opposed to emissions-reducing technologies like heat pumps, according to audience insights gathered by ECF partners in Germany. Credit: Sam Bush / Nesta / Climate Visuals

Spotlight

Audience insights reveal German homeowners open to net-zero technologies

In **Germany**, public debate in 2025 was marked by growing rhetoric around rolling back climate policies. Against this backdrop, the ECF supported partners to examine public attitudes towards climate action, including where support may be broader or more nuanced than public debate suggests.

Research carried out with trusted polling partners found that Germans across the political spectrum, including homeowners, remained open to practical net-zero technologies such as rooftop solar, heat pumps and electric vehicles, especially when they were seen as useful, cost-effective and relevant to household needs. The findings helped challenge the assumption that support for climate solutions had collapsed among these groups, and offered a more grounded picture of where public backing still exists.



Fossil-Free Energy

Accelerating a just transition to affordable, secure clean energy

Europe's energy debate increasingly centred on security and bills — which, in practice, put the policy spotlight on the speed of renewables rollout, grid buildout, and building electrification. That shift created headwinds for some climate measures, but it also strengthened the case that clean power and electrification are strategic infrastructure for resilience.

The ECF's Fossil-Free Energy portfolio supports the shift to an energy system based on clean electricity, lower fossil fuel dependence and more resilient infrastructure. In 2025, this work focused on areas where progress can deliver clear public benefits: faster renewables and grid development, more affordable and efficient buildings, and stronger local energy resilience.

Key developments in 2025

Advancing the infrastructure for a clean power system

A major development in 2025 was the adoption of the EU Grids Package, reflecting a growing recognition that modernising electricity infrastructure is essential to Europe's energy transition. The package set a stronger framework for grid planning, permitting and investment. ECF-supported analysis and public-interest advocacy helped keep attention on grids as a foundation for lower-cost electricity, industrial competitiveness and energy security.

Keeping momentum towards Europe's 2040 goal

In December, the European Council agreed a 2040 climate target of 90% net emissions reductions, an important milestone for the next phase of European climate policy. Throughout the year, ECF partners contributed evidence and proposals showing how renewables, grids and electrification can help deliver that goal while also reducing exposure to fossil fuel price volatility and supporting Europe's long-term resilience.



Credit: Timotej Vrtnik / Focus

Keeping housing and buildings central to a fair transition

In 2025, housing and buildings became an even more important part of the climate conversation as affordability pressures intensified across Europe. At EU level, the European Commission's first plan on housing created new space to connect renovation, energy efficiency and decarbonisation. Nationally, ECF-supported partners highlighted how cleaner heating and better-insulated homes can lower bills and improve resilience. For example, in France, broad public and stakeholder support — including from ECF partners — helped protect MaPrimeRénov', the country's flagship home renovation programme, when its future came under question.



Spotlight

Community energy brings resilience to Eastern Europe

Across Central, Southern, and Eastern Europe, community-led energy projects are making the transition real at local level — cutting bills, strengthening resilience and building buy-in in places often hit hardest by economic and geopolitical shocks.

In **Ukraine**, where Russian attacks deliberately target critical infrastructure, ECF-supported partners worked with municipalities to keep essential services running. In 2025, EcoClub helped install solar stations at 35 municipal facilities — mainly hospitals and water utilities — delivering reliable power where it is most needed during the war. Ukraine's transition is also shaped by wartime demographics, with many men fighting on the frontlines: Greenpeace Ukraine and RePower UA trained women, veterans and displaced people to install solar power stations, including a first where an all-female team completed a full solar installation.

In South Eastern Europe, ECF partners are also helping community energy deliver immediate security and affordability. In **Romania**, a first €170m funding call for local governments (within a €500m Recovery and Resilience Plan envelope) will help Just Transition municipalities launch energy communities. And in **Bulgaria**, polling from our partners showed 65% back a 2035 transition with renewables as top investment priorities — demonstrating strong demand for citizen-led power even as policy lags.



ECF partners Greenpeace Ukraine and RePower UA trained women to install photovoltaic solar panels while men fight in the ongoing war, which threatens critical infrastructure.



Credit: Alastair Johnstone / Climate Visuals

Clean Transport Solutions

Advancing fair, affordable, and politically resilient transport transitions

Transport stayed a pressure point for Europe's transition: road emissions remain high, while debates on household affordability and industrial competitiveness cast shadows over key EU transport measures. Notably, lobbying to roll back the proposed 2035 ban on new fossil fuel cars partially succeeded: in December 2025, the European Commission proposed replacing the planned 100% phaseout with a 90% tailpipe CO₂ reduction target for new cars, with the remaining 10% to be compensated through credits linked to lowcarbon steel and the use of efuels or biofuels.

Despite this setback, the ECF network helped secure important advances. By focusing on affordability, social fairness, and realworld delivery, clean transport solutions continued to gain ground at EU and national levels — reinforcing the case that decarbonisation and public benefit must go hand in hand.

Key developments in 2025

Making clean transport affordable: the ETS2 package

A priority in 2025 was ensuring that the shift to clean mobility does not deepen social inequalities. In October, the European Commission announced a package to limit price volatility under ETS2 (Emissions Trading System 2), the EU's carbon pricing system for road transport and buildings, and to strengthen affordability for households. Drawing on research by ECF partners, the package includes a new financing facility for Member States, now being developed by the European Investment Bank, to support cleaner heating and transport options, including electric vehicles and e-bikes, particularly for lower- and middle-income households.

Helping defend Europe's vehicle standards

Throughout 2025, ECF-supported organisations contributed evidence and public-facing analysis in support of the EU's vehicle emissions standards during a period of political pressure to weaken them. While some changes to the framework were proposed, broader rollback was avoided. This helped preserve a clearer long-term signal for the transition to cleaner vehicles and for Europe's automotive competitiveness.



Credit: Ivan Radic / Climate Visuals

A major national step forward in Spain

Spain's Sustainable Mobility Law, approved in October 2025, was an important national milestone after several years of civil society work to support more practical transport reform. The ECF network contributed to this effort, helping make the case for sustainable mobility that meets people's needs while aligning with climate and energy objectives. The law creates a more coherent framework for mobility planning and decarbonisation, strengthens requirements on electric vehicle charging, reviews the car labelling system linked to low-emission zones and subsidies, assesses reductions in short-haul flights, and — for the first time in Spain — sets a sector-wide commitment to climate neutrality in transport by 2050.

Spotlight

Public backing for solutions to transport poverty in Czechia

In **Czechia**, transport poverty was largely absent from public debate before 2025. To address this gap, the ECF supported a dedicated study on transport affordability, which revealed that more than 2.5 million people — nearly a quarter of the population — struggle to meet their transport needs. The findings were brought into the mainstream through coverage on a popular national radio station and followup media reporting, grounding the issue in everyday experiences and household pressures.

The project helped shift public discussion towards practical, socially fair solutions, such as improved public transport, shared mobility, and the deployment of electric buses and shuttles. The evidence generated has since been taken up by policymakers and is informing the work of Czechia's Expert Working Group on the use of the EU Social Climate Fund, demonstrating how datadriven engagement can translate public concern into policy priorities.





Europe's Industrial Transformation

Positioning clean industry as a competitiveness and investment agenda

In 2025, Europe's industrial transition moved closer to the centre of the EU's economic and political agenda. The European Commission's Clean Industrial Deal, announced in February, marked a strategic shift by explicitly linking decarbonisation with competitiveness — framing clean technologies and infrastructure as essential to Europe's industrial future rather than a constraint on it.

The ECF's Industrial Transformation portfolio worked to help ensure that this political momentum translated into tangible progress. In 2025, that meant supporting analysis, collaboration and public debate on the technologies, infrastructure and policy frameworks needed for cleaner industry to succeed, while also keeping jobs, investment and regional opportunity in view.

Key developments in 2025

Placing electrification at the core of the EU's industrial future

One important step in 2025 was the clearer place given to electrification within EU industrial strategy. The Clean Industrial Deal recognised that cleaner electricity and industrial modernisation need to advance together. ECF-supported work helped highlight both the scale of the opportunity and the remaining delivery gap, showing why electrification matters not only for emissions reduction, but also for competitiveness, innovation and future investment.

Laying the narrative groundwork for industrial transformation

The ECF also supported work to better understand how industrial change is discussed and perceived across different national contexts. Research across several countries found that clean industry gains traction when it is connected to economic renewal, energy resilience and regional opportunity. These insights helped strengthen the public-facing case for industrial transformation without reducing it to a purely technical policy debate.

Supporting a stable framework for industrial investment

At EU level, 2025 also brought continued debate over the policy framework shaping industrial decarbonisation, including the Emissions Trading System (ETS) and the Carbon Border Adjustment Mechanism (CBAM). ECF partners contributed evidence and recommendations aimed at preserving the credibility of these tools while improving their effectiveness. This work also helped keep attention on lead markets for cleaner industrial products such as steel, where early policy support can help unlock investment and scale.

Visit to the Ori Martin Steelwork in north Italy, after the Global Steel CSO Strategy Meeting in Milan.



Spotlight

From insight to impact: building public support for clean industry

The ECF helped partners use evidence-backed narratives to strengthen public understanding of industrial transition and the practical benefits it can bring. In **Poland**, early traction came from a “Made in Poland” framing that connected clean industry with energy security and jobs. In **Spain**, partners helped raise the profile of industrial transition and electrification preparedness ahead of the next electoral cycle. In **France**, trade union-led work highlighted the case for a regional just transition in automotive areas facing industrial change.

We also helped strengthen campaign readiness so trusted local voices could respond when opportunities emerged. Through *Clean Industrial Voices* in **Spain, Germany, France, Italy** and **Poland**, partners elevated workers, regions and sectors already benefiting from the transition, offering local proof points and helping counter misconceptions. Convenings, workshops and practical toolkits also supported collaboration across media, regional industry networks and business voices, so the case for clean industry could be communicated clearly and credibly when it mattered most.





Laurence Tubiana, CEO of the European Climate Foundation, highlighted the intersection of climate risk and financial risk during the Climate Innovation Forum in London, July 2025.

Financing a Just Transition

Achieving the policy and financial foundations of Europe's climate transition

Financing the transition became a frontline issue as budgets tightened and spending priorities shifted toward defence and competitiveness. Alongside growing pressure to roll back sustainability requirements for business and finance, debates increasingly focused on who pays, how risks are shared, and whether the EU's financial rules can credibly mobilise investment at scale.

The ECF's Climate Finance and Corporate Action portfolio focused on the policy and financial conditions needed to fund climate action. In 2025, this included work to support stable rules for sustainable finance, encourage better alignment between public spending and climate goals, and advance practical tools that can help mobilise investment in Europe and beyond.

Key developments in 2025

Supporting the foundations of EU sustainable finance

As pressure grew in 2025 to weaken parts of the EU's sustainable finance framework, the ECF and its partners focused on helping preserve the core of key rules, including the Corporate Sustainability Reporting Directive (CSRD) and the Corporate Sustainability Due Diligence Directive (CSDDD). This included research, policy input and joint engagement, alongside broader backing from essential stakeholders — a joint statement led by partners from our network and supported by 480 signatories across finance and business demonstrated broad market support.

Contributing to the debate on Europe's next long-term budget

As discussions began on the EU's next Multiannual Financial Framework for 2028–2034, the ECF supported collaboration across a wide range of organisations working on the role of public finance in the transition. Through the EU MFF Hub, a platform of NGOs, think tanks and cross-sector alliances, partners shared analysis and engaged on how the budget can provide greater long-term certainty, align more spending with climate goals and help crowd in private investment.

Advancing guarantees as a practical finance tool

At international level, the ECF continued to support work on guarantees as a way to help reduce investment risk and unlock more capital for climate-related projects in emerging markets. Through the Green Guarantee Group, this included practical proposals on how guarantees could work more effectively at scale, helping strengthen their role within wider climate finance discussions.



Country members representing the Premium Flyers Solidarity Coalition met in Chantilly, France, in October 2025.

Spotlight

Driving coalitions of the willing through the Global Solidarity Levies Task Force

The Global Solidarity Levies Task Force demonstrated how coalitions of the willing can deliver concrete climate finance outcomes even in a difficult geopolitical context. In July, eight countries launched the Premium Flyers Solidarity Coalition to introduce levies on premium flyers and private jets to raise new, debtfree resources for climate and development. By COP30, participation had grown to 13 countries, with the European Commission providing support.

Hosted by the ECF and chaired by Laurence Tubiana, the Task Force helped move solidarity levies from a niche idea into a more widely recognised option within international climate and development finance discussions. Its report, *The Untapped Potential of Solidarity Levies*, set out practical next steps for expanding this work, including the growth of the premium flyers coalition and exploration of other levy models.



Organised visit by the Italian Association of Sustainable Agrivoltaics to land used both for agricultural production and solar photovoltaic energy generation.

Land, Food, and Nature

Advancing climate and naturepositive land use

Land and food policy became one of the most contested parts of the Green Deal. Farmer mobilisation and cost pressures amplified calls to roll back environmental requirements, even as droughts, floods, and biodiversity loss made the case for resilient land use more immediate.

Against this backdrop, our Land, Food, and Nature portfolio supported a number of important advances in 2025. These included helping defend key EU protections, backing nature-based solutions with clear practical benefits, and strengthening dialogue with farmers and rural stakeholders on how climate and nature goals can work in real-world conditions.

Key developments in 2025

Rebuilding dialogue between climate goals and farming realities

An important strand of work in 2025 focused on understanding farmers' concerns and identifying practical ways to connect climate action with economic viability in rural areas. Research through the *Europe Talks Farming* project by our partner More in Common highlighted worries about income security, policy uncertainty and market pressure, but also showed openness to fair and workable sustainable solutions. In Italy, we launched a separate partnership with the Italian Association of Sustainable Agrivoltaics (IASA), to run workshops showing how agrivoltaics can support farming practices and generate extra income. Together, these initiatives show that support for the transition from rural sectors relies on practical, farmer-relevant solutions.

Helping preserve the Nature Restoration Law

The EU Nature Restoration Law came under sustained pressure in 2025. ECF partners contributed to the public debate and policy discussion around the law, helping underline its importance for biodiversity, climate resilience and long-term land health. Despite a highly contested process, the core of the legislation was preserved, protecting an important part of the EU's environmental framework.

Moving peatland restoration from policy to delivery

2025 also saw progress on implementation through the launch of *Scaling Up Peatland Restoration* in the EU, a multi-year initiative bringing together partners across several countries. The programme aims to restore thousands of hectares of degraded peatlands, develop pipelines of restorationready projects, and unlock new financing approaches. By moving from policy ambition to concrete action on the ground, the initiative championed peatland restoration as a highimpact solution for climate mitigation, biodiversity recovery, and rural resilience.

Spotlight

Shaping a fairer CAP for farmers and rural communities

In 2025, debate about the future of the Common Agricultural Policy (CAP) reflected growing concern that the current system does not do enough to support fair incomes for farmers or deliver for climate and nature. As the European Commission presented its proposal for the 2028–2034 EU budget, ECF partners highlighted concerns that some changes could weaken environmental protections, reduce dedicated funding for climate and biodiversity, and continue to favour broad income support over more targeted incentives.

The ECF supported partners in setting out a shared vision for CAP reform that would reward farmers for benefits such as climate resilience, biodiversity protection and healthier soils. This included backing the *Good Food Good Farming* position paper, endorsed by 97 organisations and presented to EU decision-makers alongside farmers. The ECF also supported a joint petition with farming organisations and campaigners that gathered 120,000 signatures. Together, these efforts helped keep the CAP debate focused on fairness, practical delivery and the long-term future of farming and rural communities.



The *Good Food Good Farming* action at the EU Commission in June 2025 presented the movement's position paper asking for a just agroecological transition away from industrial agriculture.





Supporting a Resilient Climate Ecosystem

In a year marked by geopolitical instability, regulatory pressure and growing constraints on civil society, the ECF increased its focus on the resilience and long-term effectiveness of the wider climate field. Alongside programme work, 2025 also saw continued investment in foresight and organisational support to help partners adapt and stay effective in a more difficult environment.

The study trip of the New Energy Academy organised by ECF offered staff from civil society organisations in Southeast Europe a chance to discover real-world examples of local energy transition in action.

Embedding strategic foresight as a core capability

Throughout 2025, the ECF continued to strengthen its use of strategic foresight. This included long-term scenarios, mid-term planning and short-term stress-testing. One major initiative focused on EU enlargement and climate, exploring how new Member States could shape Europe's climate path by 2035 across areas such as energy, agriculture, governance and fiscal policy. The project brought together more than 240 experts, policymakers and civil society representatives and produced a set of scenarios and recommendations on a question of growing strategic importance.



Presentation and debate around our foresight work on climate action in an enlarged EU, carried out together with Future Impacts.

Strengthening civic space and
our partners’ organisational resilience

At the same time, the ECF continued to invest in the strength and resilience of the wider climate field. Through our Network and Organisational Development work, this included support to partner organisations on areas such as long-term planning, organisational effectiveness and capacity building. In 2025, more than 70 organisations across the network benefited from this support, helping reinforce the foundations needed for a strong and durable climate ecosystem.



Throughout the year, the ECF organised workshops and scenario exercises to support the capacity and resilience of partner organisations.



Key Figures and Financials

Building, diversifying and strengthening our network

The European Climate Foundation is a Dutch foundation based in The Hague, with additional serviced offices in other countries to support its work.

Thanks to the generous support of our philanthropic partners, in 2025 we provided 959 grants to 631 partner organisations. With 206 first-time partnerships, we have developed our ecosystem to new areas of action.

These figures are based on our latest audited financial overview from 2025. They cover regranting activities across our programme portfolios, as well as management and administration. In addition to these programmes, we incubate platforms to create and build out new institutions that are needed for climate action. These include the [Pooled fund for International Energy \(PIE\)](#), [ReNew2030](#), [Forum New Economy](#), and [Climate Finance Fund](#). In 2025, ECF-hosted platforms had a total of 39 employees and €84,663.183 in expenditures.

Read more about our [funding partners](#), [grant-making](#), and [governance](#).

2025 In Numbers



959
GRANTS



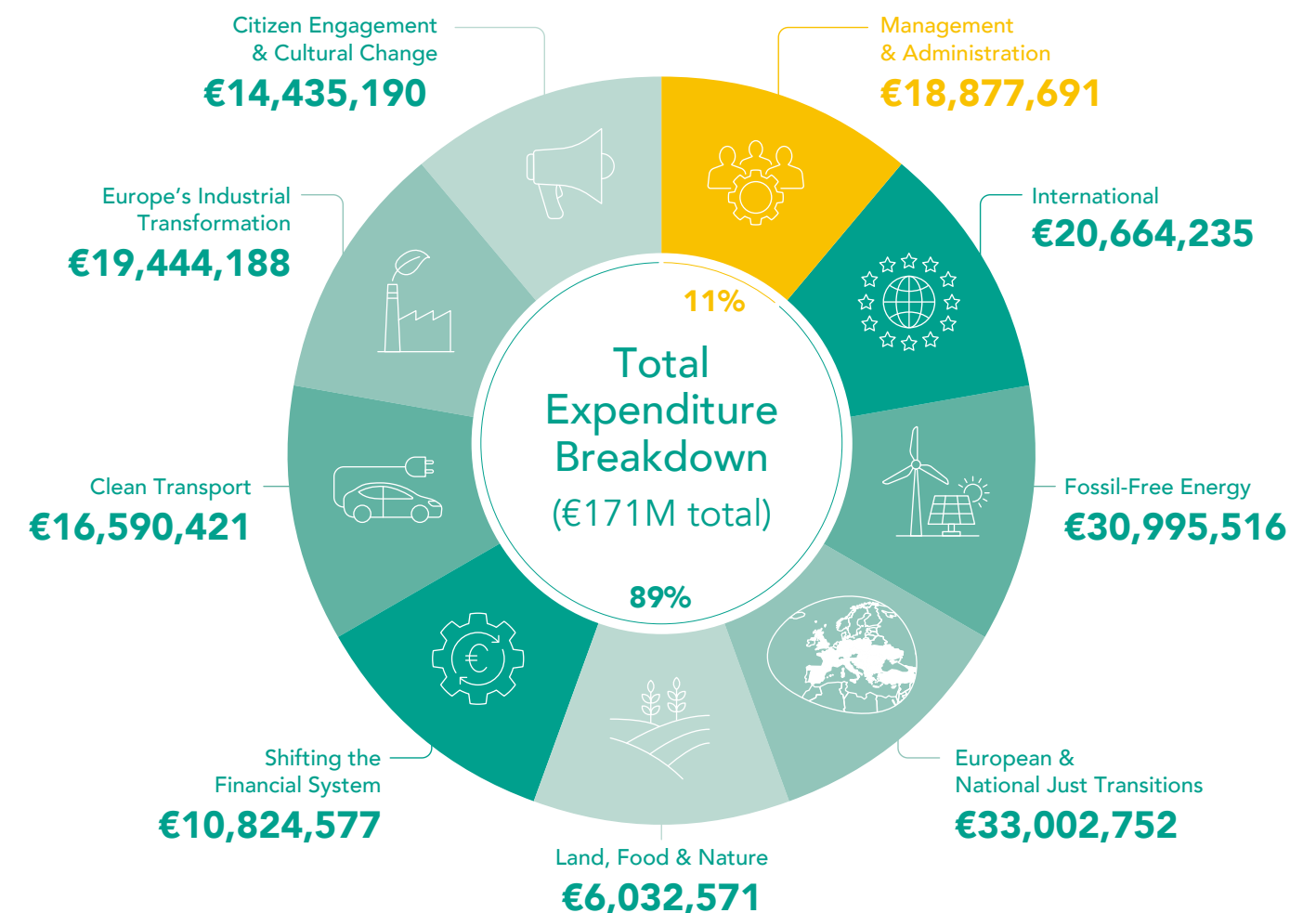
631
PARTNER
ORGANISATIONS



206
FIRST-TIME
PARTNERSHIPS



273
EMPLOYEES



EMPLOYEES



273

EMPLOYEES

188 FEMALE
85 MALE

NATIONALITIES

20% FRENCH	4% DUTCH
14% BRITISH	3% ITALIAN
8% GERMAN	3% IRISH
8% BELGIAN	3% AMERICAN
8% SPANISH	3% CHINESE
4% POLISH	22% OTHER

AGE

20-35	36-50	51+
42%	49%	9%

MANAGEMENT



10

MANAGERS

4 FEMALE
6 MALE

NATIONALITIES

1 BELGIAN	1 ITALIAN
1 BRITISH	1 POLISH
1 DUTCH	1 US-AMERICAN
4 FRENCH	

AGE

36-50	51+
3	7

Looking Ahead

As Europe and the wider international community move further into the implementation phase of the Paris Agreement, the **years ahead will be shaped increasingly by delivery**. The central question is no longer only what targets are set, but how they are translated into practical measures that can reduce emissions, strengthen resilience and support long-term economic stability.

In Europe, this will place particular attention on **areas that underpin the transition** as a whole, including clean industry, electricity grids, electrification and investment frameworks. Progress in these sectors will be important not only for climate goals, but also for energy security, competitiveness and the affordability of the transition for households and businesses.

The political context is also likely to remain challenging. Elections, economic pressure and **geopolitical uncertainty** will continue to influence the pace and shape of climate action across Europe. At the same time, these conditions also reinforce the relevance of practical solutions that can lower exposure to fossil fuel volatility, support domestic resilience and deliver visible benefits over time.

The next phase of negotiations on the **EU's long-term budget** will be another important test. As competing demands on public finance increase, the key question will be whether Europe can maintain a stable investment framework that supports climate action alongside wider social and economic priorities. The outcome will matter both for Europe's domestic transition and for its broader contribution to international climate cooperation.



Internationally, attention will turn to the **next stage of implementation** under the Paris framework, with future climate summits offering opportunities to review progress and sustain cooperation. In a more fragmented global context, momentum is likely to depend on practical collaboration and trust-building across regions and institutions, including at sub-national level.

Against this backdrop, the ECF will continue to support work that keeps climate action practical and grounded in evidence. Keeping the spirit of the Paris Agreement alive will depend on proving that climate action can deliver in ways that matter to people — consistently and at scale.

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