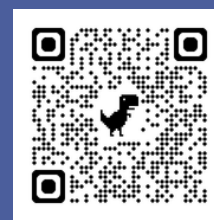


Accelerating a 'win-win' international energy transition

Theory of Change for implementation

1-pager (* reach out for full version)



Purpose: To build consensus on a shared international pathway to accelerate a just energy transition which benefits all stakeholders ('win-win'), catalyzed at the Santa Marta conference on 24-29 April 2026

Request: Connect for a 30-minute call to join our coalition for implementation

In development by an informal, open **think tank network of 100+ professionals** from UN system, energy, finance, sustainability, public policy and academia, coordinated by United Future Foundation

Developed & coordinated by
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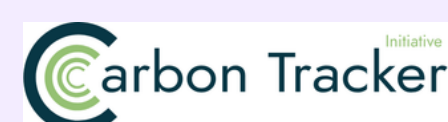
With contributions & support from:



Global Compact
Network UK



Global Compact
Network Netherlands



1 | SITUATION ANALYSIS: CLIMATE & ENERGY TODAY



Rapid cost declines in solar and battery technologies are making new electric solutions more efficient and cheaper than fossil fuels, while increasingly **resolving intermittency** challenges. These advances indicate that a critical **tipping point** in the energy transition is within reach, with social challenges remaining.

Fossil fuels still count for ~80% of global energy supply. Renewables remain largely **additive** rather than **substitutive**. Path dependencies create structural advantages for fossil fuels and distort competition. In some countries, a shift in confidence back towards fossil energy can be observed.

COP30 delivered neither a commitment nor a concrete plan for the international energy transition. To address this gap, we defined the best-case global outcome for all, and worked backwards to make it operational. The **Santa Marta conference** now offers a unique opportunity to turn this pathway into coordinated action.

2 | THEORY OF CHANGE (*turn page for more info)

Innovation Accelerators

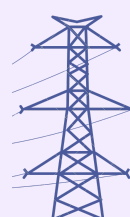


Facilitation by multilateral consortiums, based on SEMATECH project for semiconductors, as counterweight to OPEC, can build financial **incentive structures** to **cascade policy instruments**, **reduce costs** and **upscale infrastructure** worldwide, e.g., for mineral & metal recycling, cable & transmissions infra, EV charging, smart grids and mini-grids.

Feedback loop



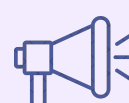
Innovation Accelerators & Intra-transitions enable self-reinforcing financial and political loop effects, accelerating transition towards a **tipping point** of 50% renewables in the global energy mix, leading to **substitution** of existing fossil fuel capacity.



Intra-transitions

Internal **transitions of large energy companies**, learning from i.a. Ørsted, Iberdrola e.g. re-training staff, influenced by incentive structures, can **accelerate substitution** of existing fossil fuel share in global energy mix.

Coalition Instruments



To trigger this, coordinated instruments and signals are needed from a broad coalition of policy and **institutional investors**, e.g. **patent pooling**; standardized **green bonds**; and **contracts for difference**.

3 | HOW TO CONTRIBUTE

Join our conversation to co-create concepts for Innovation Accelerators, to upscale pieces of **new energy systems** worldwide: circular, renewable & respecting people & planet.

Key Points from the Theory

(full version available upon request)

Analysis

3 scenarios for international fossil fuel phase-out

We can go here if we take right action



Win-win: a Just Transition for All

Accelerated innovation and intra-transitions of energy companies make business and socio-economic cases for transition clearer, igniting a self-reinforcing feedback loop of global transition, where everyone wins. Supports effective implementation of Fossil Fuel Treaty

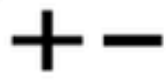
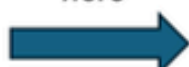
Win-win co-benefits:

- + Lower energy prices
- + More clean jobs long-term
- + Energy independence
- + Fewer microplastics
- + Less air pollution

Reduced timescale



We are here



Win-lose: Competition of Renewables vs. Fossil fuels

Fossil fuel companies worldwide continue to lobby inside governments against policies supporting transitions towards electrotech. Meanwhile, solar & battery prices decrease, the competitive edge grows and publicly funded infrastructure slowly shifts towards renewables. A temporary overshoot of climate targets is likely, with significant socio-economic consequences.

Increased timescale



Lose-lose: Fatal delays in the transition

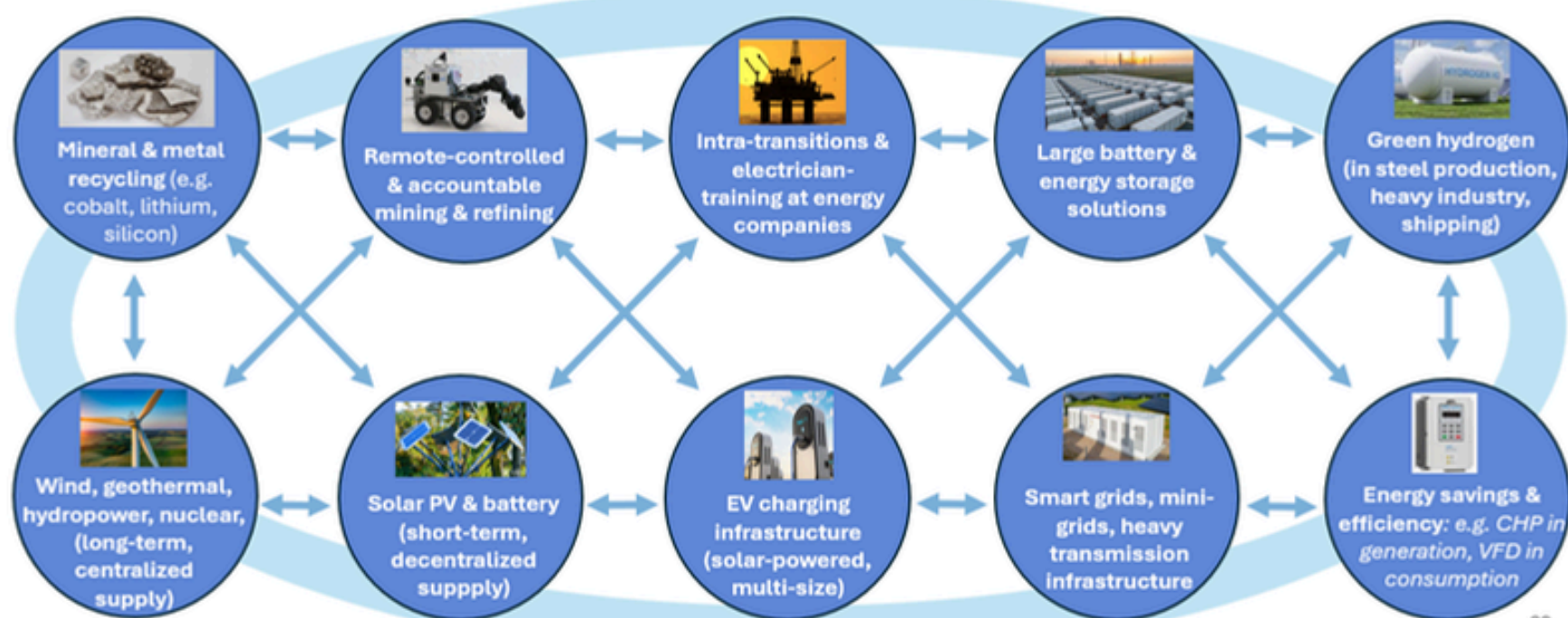
A combination of worldwide aggressive lobbying by fossil fuel companies and geopolitical developments delays public support needed to shift infrastructure towards grid electrification. Climate tipping points are triggered, people & planet face crisis escalation & ecosystems collapse.

14

Theory: Part 1

Circular Energy Systems: the path is clear.

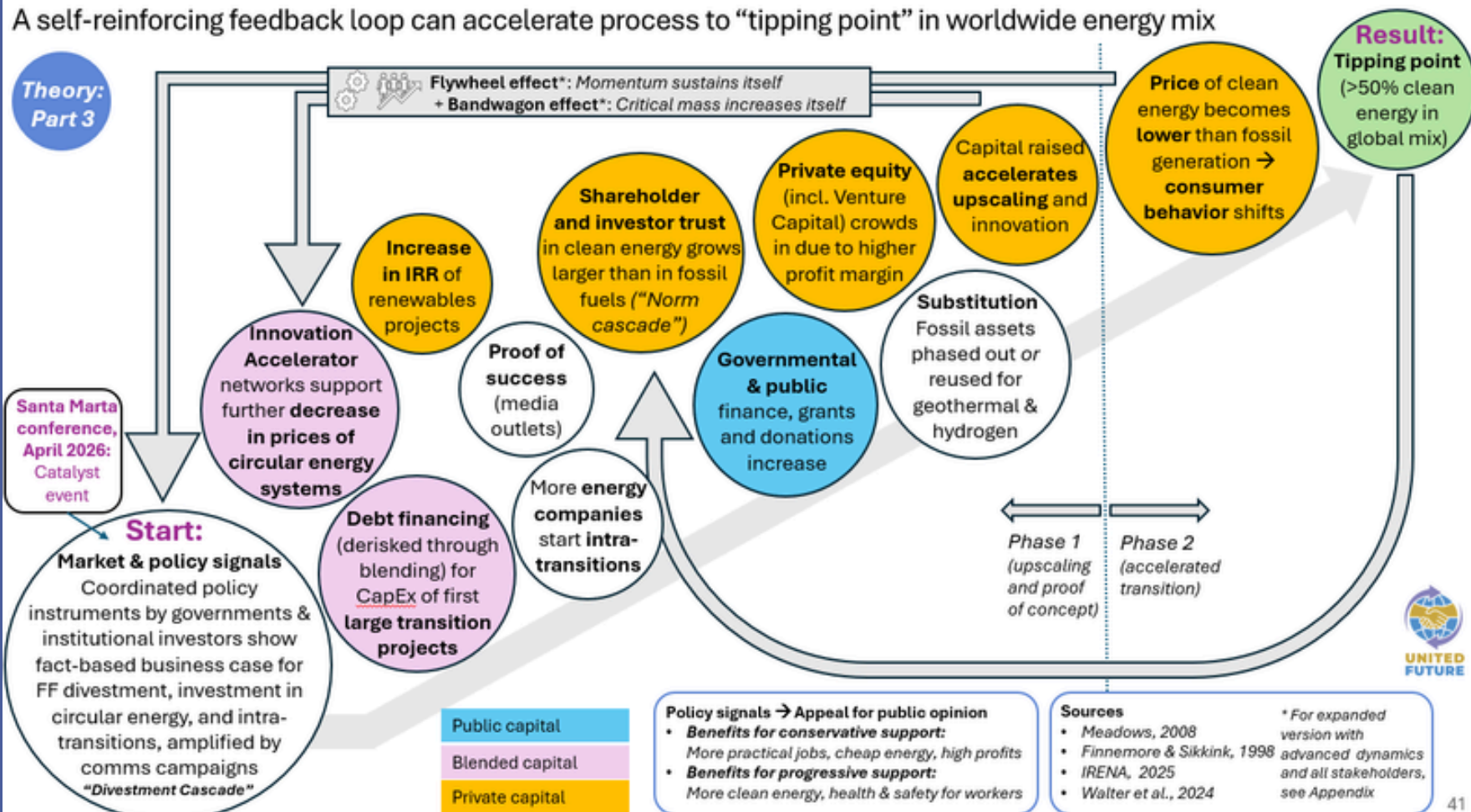
Ten examples of technology solutions that an Innovation Accelerator can include to upscale circular new energy systems (most are already operational across the globe*)



23

A self-reinforcing feedback loop can accelerate process to "tipping point" in worldwide energy mix

Theory: Part 3



41