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COP31 Talks Electrification. Fossil Fuels Remain the Problem.

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At the UN climate summit in Turkey, the drive towards electrification should not be the easy way out of securing binding commitments to phase out fossil fuels.

The latest UN climate summit, COP31, is underway in Antalya, Turkey, having started on 9 November. One of its key objectives is to boost electrification across the global economy-replacing petrol and diesel vehicles, gas boilers and some industrial processes that burn fossil fuels, with electric alternatives.

The summit's host, Turkey, has set a target of 35% of energy demand being met by electricity by 2035, up from around 20% today. Announcing the "35-by-35" pledge, COP31 president Murat Kurum described it as "one of the defining features" of Turkey's presidency, highlighting the risks of continued dependence on imported fossil fuels.

Without doubt, electrification is essential to curtailing greenhouse gas emissions, and is already gathering pace. The International Energy Agency (IEA) has declared we are living in the "age of electricity", and if stated policy pledges hold, global electrification rates will hit 31% by 2050. The COP31's focus on electrification hopes to build upon and accelerate this existing trend.

But electrification alone will not deliver a clean energy transition. Two major challenges remain: the continued expansion of fossil fuel production, and growing geopolitical competition over clean technologies where the latter is increasingly shaping governments' climate and energy policies, as they struggle to compete with dominant "electrostates" such as China.

Silence on Supply

The Australian climate minister and COP31's president of negotiations has described electrification and fossil fuel reduction as "different sides of the same coin". But they are not interchangeable. Electrification can reduce some demand for fossil fuels, but it will not stop governments approving new projects and expanding supply.

> At COP31, fossil fuels are entirely absent from the formal agenda. Is a focus on electrification a way to avoid the perennially thorny issue of fossil fuels?

By 2030, governments are planning to produce more than double the amount of fossil fuels than would be consistent with limiting warning to 1.5°C. More concerning is that this assessment was made before the conflict and disruption in West Asia, which has caused the US, Brazil, Guyana, Argentina, Canada and other fossil fuel producers to increase output in the name of energy security. The UK, meanwhile, has approved the Jackdaw gasfield in a purported bid to protect jobs and keep homes warm.

The 35-by-35 target is also silent on where that additional electricity will come from. After all, a country could in theory increase its rate of electrification by burning more fossil fuels (imagine a country where every car was electric, but all that electricity came from coal).

A Genuine Energy Transition

What is needed is the two-pronged approach of electrifying economies while simultaneously phasing out fossil fuels and reducing their supply. This will ensure capital is reallocated to renewable energy for electrification. Governments can do this nationally or through international initiatives such as the Beyond Oil and Gas Alliance, the Clean Energy Transition Partnership and the Cop-adjacent conference on Transitioning Away from Fossil Fuels.

Skirting the fossil fuel issue is nothing new at these summits. It took 26 years for a formal resolution or agreement to explicitly name fossil fuels, in Glasgow in 2021. And even then it only passed with calls to "phasedown" unabated coal power and phase-out "inefficient" fossil fuel subsidies.

At COP31, fossil fuels are entirely absent from the formal agenda. Brazil has published an extensive voluntary "roadmap" to guide governments' phase-out efforts, but this sits outside the formal negotiations and lacks timelines.

This begs the question: is a focus on electrification a way to avoid the perennially thorny issue of fossil fuels?

Just Electrify Everything

Even growing demand for electricity does not guarantee a clean energy transition. The data centre boom in the US and beyond, for instance, is driving the use of gas and coal to generate electricity. The International Gas Union, a lobby group for natural gas producers, is explicitly positioning gas as a way to meet growing demand from data centres and AI.

> While the drive towards electrification at Cop31 is to be welcomed, it cannot be a substitute for the harder political task of securing binding commitments to phase out fossil fuels.

Increasing electrification looks relatively straightforward: just encourage more renewable energy production and electric vehicles. Yet, for most of the world, this would mean overcoming security and trade tensions with China, whose dominance in clean technologies, manufacturing and rare earth processing makes it a lynchpin electrostate in a world hoping to electrify everything.

China's dominance is near total. For the component materials of solar panels, in 2024 China controlled 93% of global polysilicon processing, 97% of wafer manufacturing-making the thin slices of silicon that form the basis of solar panels-92% of solar cell manufacturing and 86% of solar module production. It also produced more than 80% of electric vehicle batteries in 2025. According to the IEA, China is dominant across 19 of 20 energy-related strategic minerals, averaging over 70% of processing control. Achieving global electrification targets will therefore require continued access to Chinese technologies, products and raw materials.

This runs counter to almost two decades of western policy aimed at protecting domestic industries from Chinese competition and restricting China's technological development, most notably with semiconductors. While these efforts have largely failed to contain Chinese innovation, an overreliance on Chinese clean technologies is increasingly seen as a "serious risk" to Europe's economic and national security. European governments have responded with tariffs and restrictions on Chinese imports and investments, while seeking to build up their own manufacturing capacity.

Governments face a difficult dilemma. Opening their economies further to Chinese technologies could mean unpicking trade protections developed over years and create new dependencies, while refusing to cooperate with China risks slowing electrification and may even drive some governments to abandon climate and energy policies altogether because they cannot compete.

While the drive towards electrification at COP31 is to be welcomed, it cannot be a substitute for the harder political task of securing binding commitments to phase out fossil fuels, fast and fairly.

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