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Anchoring European energy partnerships in a changing geopolitical context

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The energy sector is shaped by shifting dynamics, often driven by geopolitical shocks, which can lead to disruptions and realignments in energy flows. Energy and raw materials are fuelling tensions between nations through export restrictions, acts of sabotage or the destruction of energy infrastructure, and industrial espionage. Energy resources and technologies are now more coveted than ever given their critical role in meeting countries' energy needs and controlling strategic supply chains – such as those for gas, oil, minerals and electrical technologies. Against this backdrop, this paper explores how Europe, France and Germany should navigate their energy partnerships in this complex context.

Europe caught between "petro-states and electro-states"

Based on their domestic energy resources, countries can be broadly categorised into two archetypes. On one side, there are countries with abundant fossil fuel reserves and the extraction capacity to achieve relative self-sufficiency and act as global suppliers – such as the United States, Russia and the Gulf states. On the other, countries with limited domestic fossil fuel resources are dependent on imported hydrocarbons, but have developed their electricity generation through technologies such as solar, wind and nuclear power. China leads this approach, while Europe, through its decarbonisation policies, is increasingly following suit.

However, Europe's energy transition – from a model dependent on fossil fuel imports to one centred on local electricity production – leaves the continent in a delicate position, exposed to both fossil fuel dependencies and technological reliance on electrical equipment. In this context, its push to regain energy and industrial sovereignty by relocating critical activities is fundamentally reshaping the priorities and interests at stake in its partnerships with non-European countries.

What types of partnerships, and with whom?

Based on this premise, Europe's partnerships fall into three broad categories: those focused on **security of supply**, those centred on **technology and innovation** exchanges, and those driven by **development policy**. A single partnership may span multiple dimensions, as these categories are not mutually exclusive. While such partnerships may cover all energy sources and minerals, their technical and operational aspects vary significantly. Energy, particularly hydrocarbons such as gas and oil, remains a commodity requiring continuous supply management, with a strong emphasis on short-term planning. In contrast, minerals are extracted, stored and transported at specific times over a longer horizon.

Partnerships for **security of supply** address energy and mineral needs, imbuing them with a strategic dimension. For Europe, the importance of these resources means that partnerships cannot rely solely on standard trade agreements. Instead, they demand deeper relations with supplier countries, potentially evolving into alliances or, at a minimum, a strategic alignment of interests. The growing energy cooperation between Canada and the European Union (EU) exemplifies this approach. Such partnerships should also be interpreted as indicators of Europe's critical dependencies,

revealing vulnerabilities when geopolitical conditions turn unfavourable to its resource supply.

Development partnerships strengthen the diplomatic efforts of European countries with third nations. Europe has been a global leader in international climate negotiations by promoting decarbonisation as a core objective. In this context, partnerships must adopt a "win-win" model in the short to medium term to legitimise long-term relations with third countries. It is worth noting that this format of development partnership increasingly pits Europe against other global powers, such as China, Russia and the Gulf states. In Africa and Latin America, this competition also presents an opportunity for developing countries to diversify their trade and partnership networks.

For Europe, **technology and innovation partnerships** reflect a dual dynamic: global competition for competitiveness, where Europe is currently losing ground, and a race to preserve its sovereignty – i.e. its ability to make independent decisions and take action – in energy and related technologies (such as digital solutions, networks and electric vehicles). These partnerships are grounded in an industrial logic, driven by shared interests in specific innovation and technology segments. Unlike past experiences, ensuring robust security in the transfer of know-how and technology is essential now to maintain European strategic autonomy and safeguard expertise. Here, partnerships with like-minded partners, such as Taiwan, South Korea and Japan, should be encouraged. Meanwhile, cooperation with China must only continue under clear conditions that address the industry and research security challenges faced by European private actors regarding strategic technologies and derivatives.

What lessons learned from existing energy partnerships?

In recent decades, Europe has concluded numerous energy partnerships with countries around the world. These include memoranda of understanding on green hydrogen and critical minerals – notably with Canada, South Africa, Brazil and Morocco – as well as trade agreements on natural gas and oil – such as those with the United States, Egypt and Qatar. Beyond the diversity of these agreements, Europe engages with these countries through multiple approaches – ranging from EU-led negotiations to bilateral initiatives undertaken by individual member states, in particular Germany and France. This fragmentation may raise questions about missed synergies and inefficiencies. While coordination occurs on an ad hoc basis, it frequently faces challenges, such as a lack of shared data on specific national needs and partnership strategies, as well as the sometimes competing interests of European countries and companies in their dealings with third nations. These trends reflect both the competitive positioning of European companies in the global energy market and their procurement strategies, which play an essential role in determining their competitiveness.

The energy crisis and Europe's declining competitiveness have called into question its attractiveness as a partner. The prospect of accessing the world's largest market – despite its shrinking consumption – no longer carries the same weight as other markets have become more dynamic. This waning appeal is compounded by Europe's inconsistent partnership strategy: trade frameworks often fail to materialise into sustained exchanges due to insufficient investment following the signing of the agreement. This is highlighted in the minerals sector, where opening mines or refining facilities requires substantial upfront capital investment. For example, since the signing of the Canada-EU Strategic Partnership on Raw Materials in 2021, the volume of critical minerals imported from Canada has barely changed. The same applies to hydrogen. This gap between ambition and action undermines the reputation of the EU and its member states as reliable partners.

The evolving global geopolitical landscape has sharpened the focus on sovereignty, which above all demands the ability to repatriate outsourced activities. In this context, Europe's partnerships reveal paradoxical realities. Despite Europe's inability to relocate production activities due to social or environmental acceptability constraints, these same activities often operate under less stringent standards in the regions where they have been outsourced. This ethical paradox poses a credibility challenge for Europe. If sovereignty over raw

materials or technologies becomes too pressing, Europe must demonstrate its capacity to bring mining or industrial operations back to its territory – while still upholding its high environmental standards. Similarly, Europe can – and should continue to – advocate internationally and within multilateral institutions for greater regulatory transparency in these sectors worldwide. This effort should include monitoring and binding obligations regarding compliance with environmental and ethical standards.

What ways forward for France, Germany and Europe?

Since Europe has already formed partnerships with numerous countries, the primary challenge now lies in leveraging and implementing these agreements effectively. This requires self-reflection on Europe's resources, competitive advantages and vulnerabilities. It starts with the development of a more nuanced understanding of European countries' actual energy and mineral needs, their domestic resource bases and the technical expertise available domestically. As a concrete example, France and Germany support the development of a Mineral Intelligence Platform within the future EU Critical Raw Materials Centre to jointly advocate for a market structuring critical raw materials and reshape existing EU financial instruments targeting projects across the sectoral value chain.

Europe must make strategic decisions about which resources to exploit for critical purposes, which to protect (e.g. refusing to mine for socio-environmental reasons) and, above all, how to promote recycling industries and the circular economy to structurally reduce demand for minerals. A roadmap could help to identify and focus on key drivers of Europe's attractiveness. European expertise and facilities must be leveraged (and safeguarded) through technology partnerships. Ultimately, Europe's appeal to the innovation sector will depend less on its ability to compete with China in areas such as lithium and solar and more on its existing strengths such as wind, nuclear, geothermic energy, energy networks, recycling. the circular economy and technological substitutes.

At the bilateral level, French and German trade practices offer two pathways. France aims to reduce dependencies while also deepening strategic relationships with third countries, which in some cases may extend to defence agreements, such as those with the United Arab Emirates and Qatar. Germany, meanwhile, focuses on stimulating trade to foster industrial cooperation. Following the 2026 G7 Summit in Evian, both countries are set to organise a joint roundtable with the French and German private sectors on permanent magnets made from rare earths. The EU, within the scope of its mandate, must evolve its partnerships to strike a balance between addressing security concerns – both its own and those of its partners – and boosting trade and industrial exchanges to strengthen competitiveness by consolidating the European industrial base. However, these approaches can only be credible if the EU demonstrates its ability to tackle its own internal challenges related to security and competitiveness (e.g. reducing red tape, advancing electrification through a favourable pricing policy, providing reliable support for innovation and scaling up, and continuing to integrate the single market).

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