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With climate realism ascendant, What Now?

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The “Climate Change” Narrative is Changing

- **The "consensus" of the past 40 years**
  - Rapid decarbonization was both necessary and achievable
  - Mitigation framed as a matter of political will; no structural barriers
- **Within the past year**
  - Realism/pragmatism about economic, political, and social constraints
  - Recognition of other energy dimensions (reliability, cost)
  - Mitigation slipping from center of climate policy and political dialog
- **How to accelerate this trend?** (Or at least prevent backsliding)?
  - Catalog signs/symptoms of the shift
  - Understand root causes
  - Actions to influence future climate policy?

Signs and symptoms of a strategic retreat

- **Aggressive mitigation measures are being delayed or scaled back**
  - Europe has softened its combustion-engine phaseout ; U.S. has moderated proposed vehicle standards
  - Only about four percent of roughly 1,500 mitigation policies across dozens of countries have produced any measurable effect on emissions.
- **Energy prices /regulatory burdens are driving manufacturing from Europe**
  - Policies that destroy economies without delivering visible benefits are unsustainable
- **Climate finance has faltered**
  - Trillions promised but not delivered; institutional alliances have dissolved
  - Global South increasingly views climate finance as about money rather than about mitigation

Signs and symptoms (II)

- **Global emissions continue to rise with growing dependence of fossil fuels**
  - Coal and oil consumption are at record highs, gas nearly so
- **Grid performance in the U.S. and EU is deteriorating**
  - Rising electricity prices and more frequent reliability events underscore the need for firm generation
- **The electric-vehicle market has stalled in the West**
  - Production plans are being revised at enormous cost,
  - Consumer resistance — rooted in price, charging constraints, and range anxiety — has proven far more durable than expected
- **China's trajectory further complicates the picture**
  - Deploying renewables at unprecedented scale while also expanding coal capacity.
  - Priorities of industrial competitiveness, energy security, and geopolitical leverage are misaligned with Western mitigation timelines and, in practice, undermine them
- **Shifting cultural climate**
  - Broadcast media no longer attribute every extreme weather event to climate change
  - Institutions long aligned with alarm-forward messaging (e.g., Council on Foreign Relations, NYTimes, Guardian) now carry more tempered analyses
  - High-profile individuals previously touting fantasy have become realistic

A temporary pause or a structural inflection point?

The two climate realisms – Energy & Science

- **Reframe the two dimensions of the narrative**
  - Energy realism: a recognition of what it really takes to reduce emissions at scale
  - Science realism: an accurate understanding of climate hazards and risk
- **Energy realism is setting in first**
  - The gap between aspiration and outcome has become impossible to ignore
  - The costs and disruptions of rapid energy transitions are immediate and politically salient
  - Households and firms feel them directly, and the resulting skepticism spreads quickly and organically
- **Science realism is spreading more slowly**
  - More abstract, harder to communicate
  - “Climate Change” has an emotional dimension
  - Embedded in probabilistic projections that carry uncertainty
  - But realistic assessments of climate risk should calibrate policy ambition

Underpinnings of Energy Realism

- **Rising demand driven by development, electrification, and growth of data centers**
- **The classic energy trilemma (Reliable, Affordable, “Clean”)**
  - Prioritizing “clean” inevitably compromises reliability and affordability
- **Fossil fuels still supply more than 80 percent of global energy**
  - Replacing them requires not only new technologies but new infrastructure, supply chains, and political coalitions
  - Wind/solar/batteries won’t do for a developed economy
- **Rapid decarbonization is expensive**
  - Wealthy countries struggle with the required investment; emerging economies face even more
- **Households resist higher costs, and developing countries resist slower growth**
  - Rational responses to incentives, not moral failures
- **Consumer behavior has proven remarkably sticky**
  - Preferences for large vehicles, cheap travel, and reliable power remain strong
  - Repeatedly underestimated in climate policies

Underpinnings of Science Realism

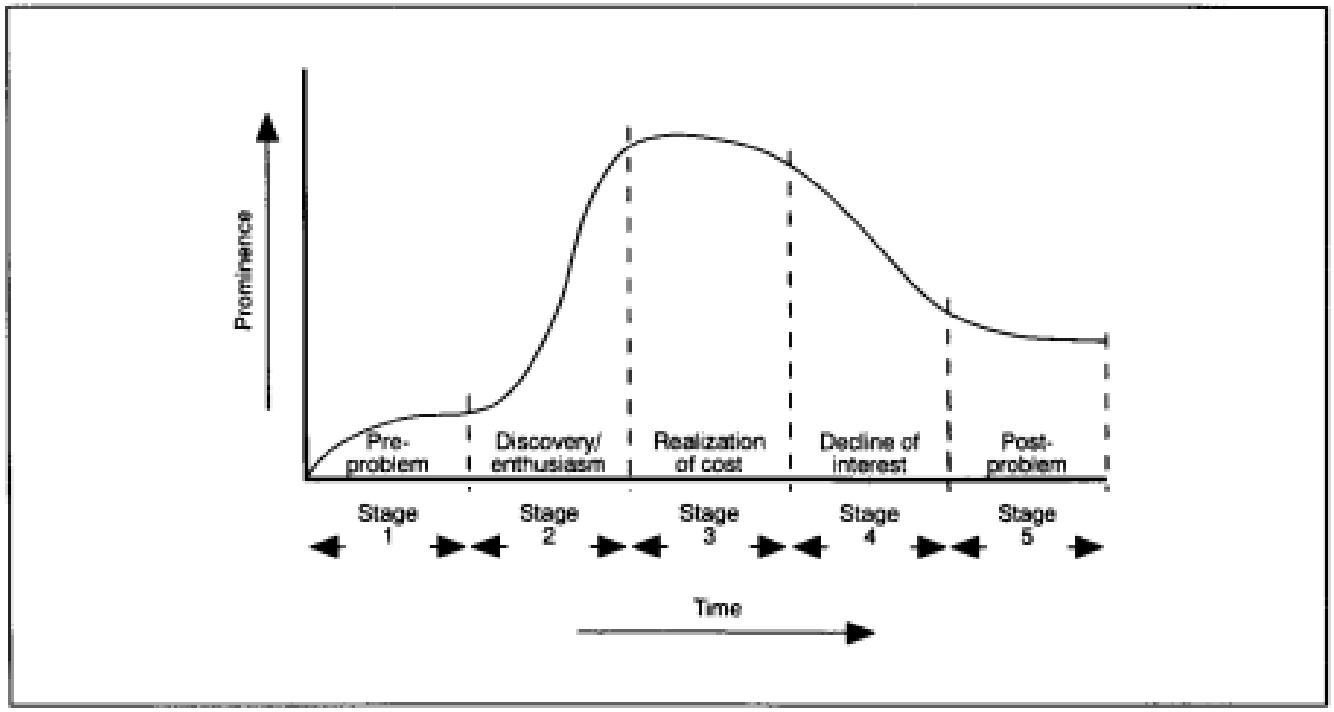
- **The true climate science has always been available in the data and literature**
  - Yet public perception shaped assessment summaries that emphasize worst-case interpretations
- **The present climate is hardly "broken"**
  - No long-term trends evident in most categories of extreme weather
- **Humanity's adaptive capacity is extraordinary**
- **Extreme scenarios have been progressively revised downward**
  - Projected emissions moderated and climate models become less sensitive
- **Most assessments project modest economic impacts of plausible warming**
- **Future risk isn't zero, but catastrophic narratives driving urgency are fading**

Maturing science realism will base climate strategy on evidence, not fear

The issue attention cycle

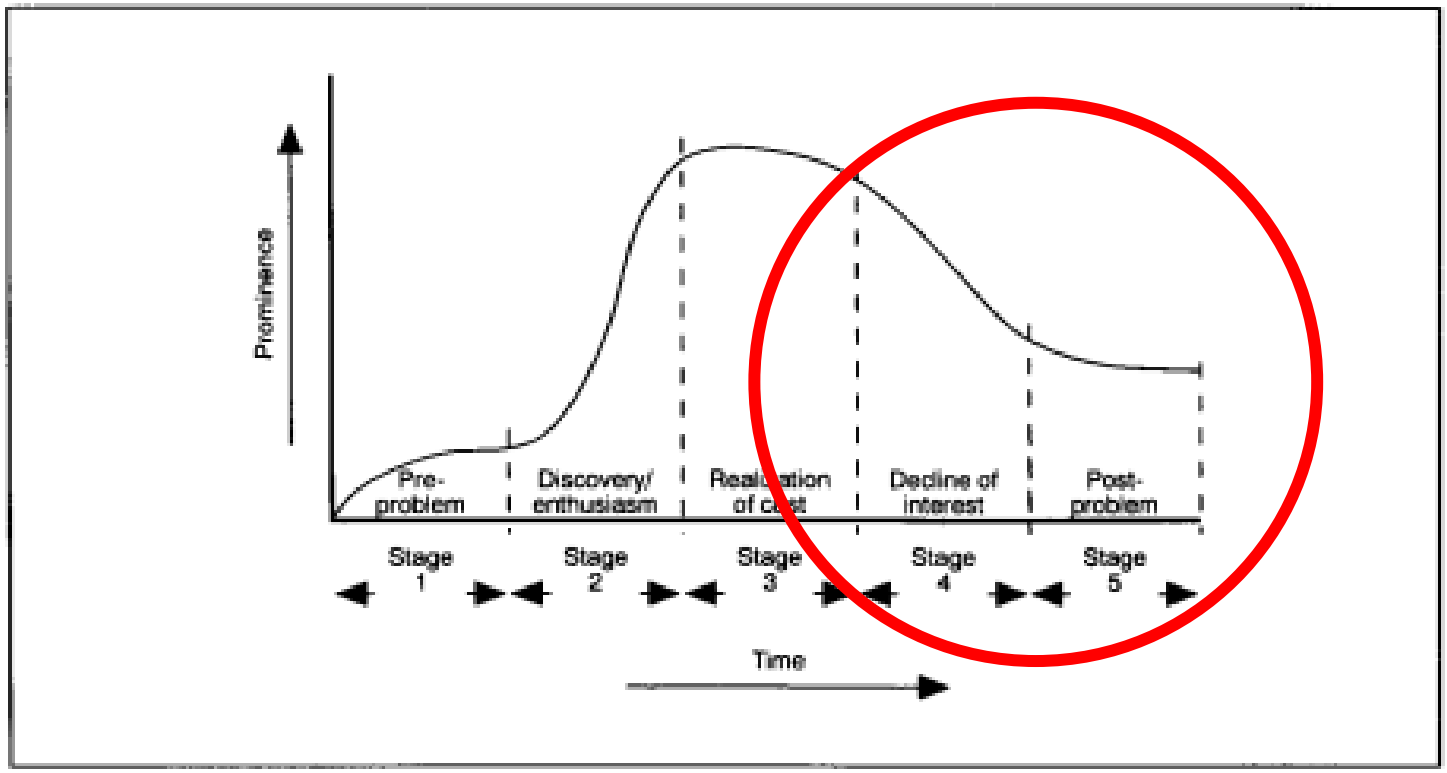
Anthony Downs
(1930-2021)

[Up and Down with Ecology (1972)]



1. **The pre-problem stage** where "… some highly undesirable social condition exists but has not yet captured much public attention, even though some experts or interest groups may already be alarmed by it."
2. **Alarmed discovery and euphoric enthusiasm** during which "the public suddenly becomes both aware of and alarmed about the evils of a particular problem. This alarmed discovery is invariably accompanied by euphoric enthusiasm about society's ability to 'solve this problem' or 'do something effective' within a relatively short time."
3. **Realizing the cost of significant progress** with "a gradually spreading realization that the cost of 'solving' the problem is very high indeed. Really doing so would not only take a great deal of money but would also require major sacrifices by large groups of the population. "

Post-peak phases of Downs' cycle



4. **Gradual decline of intense public interest** "As more and more people realize how difficult, and how costly to themselves, a solution to the problem would be … public desire to keep attention focused on the issue wanes. And by this time, some other issue is usually entering Stage Two; so it exerts a more novel and thus more powerful claim upon public attention."

5. **The post-problem stage** where the problem "moves into a prolonged limbo … new institutions, programs, and policies may have been created to help solve it …[they] always persist even after public attention has shifted elsewhere. … [the problem] may sporadically recapture public interest; or important aspects of it may become attached to some other problem that subsequently dominates center stage."

Unwinding the Impacts of the Mitigation-First Era

- **“Climate fantasy” has produced vast economic and social distortions with no palpable effect on the climate**
  - Trillions in misallocated capital
  - Regulatory turbulence, industrial dislocation
  - New dependencies on geopolitical rivals for critical minerals and manufactured goods
- **Significant psychological imprint**
  - Youth were told that catastrophe was imminent and that salvation depended on personal sacrifice
  - Failure of the promised “energy transition” induces discouragement, particularly in the West
- **Substantial scientific and institutional costs**
  - The boundary between science advice and advocacy blurred
  - Credentialed dissenting voices were marginalized
  - Careers derailed, reputations damaged, and research agendas distorted by political urgency
  - Consensus, urgency, and narrative simplicity were rewarded over uncertainty, complexity, and debate
  - Diminished credibility scientific and media organizations

What lessons should we draw from the decades of “climate fantasy”?

Need for Improved Technical Input

- **Climate science and energy are complex and nuanced, and they must be portrayed accurately to non-experts**
  - Technical voices — engineers, modelers, system planners, and energy economists — understood the fundamentals most clearly yet were often sidelined.
  - They must be restored to the center of climate policy.
- **Research funding should shift toward areas with durable value**
  - High-quality climate monitoring and observational systems
  - Adaptation strategies that deliver immediate, local benefits
  - Low-emissions technologies that can scale without subsidies or mandates
  - Innovation, not forced adoption, is the more reliable engine of long-term progress
- **The scientific community needs some self-examination — not retribution, but integrity**
  - The failure of a mitigation-first strategy was foreseeable (and foreseen by many) decades ago
- **A "truth and reconciliation" exercise asking difficult but necessary questions — not about blame, but about rebuilding trust and clarifying norms**
  - Why were legitimate uncertainties minimized?
  - Why were dissenting scientists dismissed or stigmatized? Bystander effect?
  - How did advocacy become entangled with research? What institutional incentives discouraged candor?

A more realistic future

- **“Climate action” will not end, but it will mature**
- **The world is moving toward a strategy informed by a more accurate perception of climate risk and grounded in economic realism, technological pragmatism, and political feasibility**
- **Mitigation will perhaps continue, but as a long-term innovation challenge rather than a short-term regulatory crusade**
- **Adaptation will rise in prominence**
- **Climate policy will increasingly reflect the world as it is — complex, energy-hungry, and constrained — rather than the world imagined by early-2000s climate activism**

Some questions for discussion

- **Is “realism” here to stay, or could “fantasy” become resurgent?**
  - Political, economic, reputational investments are not so easily abandoned
- **Could regional/national “realism gaps” persist?**
- **Growing societal outrage at the deceptions?**
  - Inverse “Exxon knew” lawsuits?
  - “[Kerry, Gates, Carney, Guardian, BBC, ..] knew …”
- **Will there ever be self-reflection and admission of error?**
  - Scientists? Scientific Institutions? Media? Business? Politicians? Government?

Comments? Questions?

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