

In global tensions, energy transition highlighted as enhancing security

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With the US-Israel-Iran war entering its fifth week and the Strait of Hormuz closed for nearly as long, global energy security has once again drawn heightened attention, with the energy transition increasingly raised as a solution.

In academic terms, energy transition refers to the profound shift from fossil fuels such as coal, oil, and gas toward cleaner, low-carbon sources like renewables. While the concept has long existed, new dimensions have been added to its necessity and urgency.

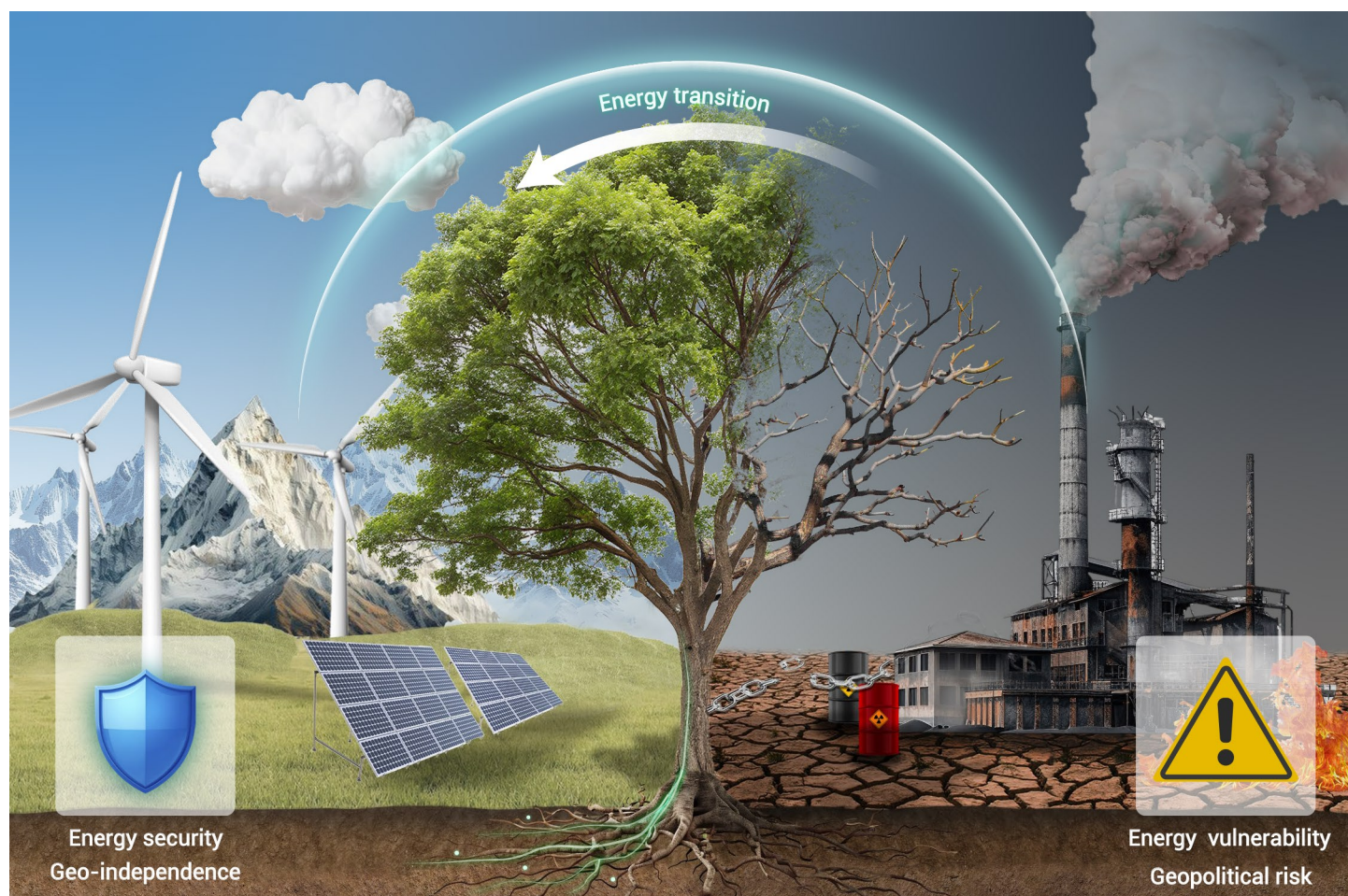
"Four or five years ago, it was a climate-driven conversation; I think it's now more of a security-driven conversation," said Rik Snee, senior vice president at Spain-headquartered integrated energy and chemicals company MOEVE, at a panel on March 25, adding that "in the end, the target is the same."¹

On the same day, European Commissioner for Climate Action Wopke Hoekstra hosted a high-level policy dialogue on the future of Europe's cement industry with industry representatives and key stakeholders.² After exploring how to position Europe's cement producers at the forefront of low-carbon

technology, participants stressed the need to develop lead markets for low-carbon and circular products to enable the transition, in which energy security is a key consideration.

As early as four years ago, the International Energy Agency noted in its *World Energy Outlook 2022* the link between energy transitions and energy security,³ stating that "Energy transitions offer the chance to build a safer and more sustainable energy system that reduces exposure to fuel price volatility and brings down energy bills."

"Reliable electricity is central to transitions as its share in final consumption rises from 20% today to 40% in the Announced Pledges Scenario (APS) in 2050," the report also noted—a scenario that has, to some extent, materialized in March 2026. As natural gas remains a primary fuel for power generation in several European countries, the closure of the Strait of Hormuz has prevented Qatar—which accounts for about 20% of global LNG supply—from exporting its output. This has driven up gas prices in Europe, and in countries such as Italy that rely heavily on gas-fired power, electricity prices and,



consequently, production costs have already been rising.

"At an age of global turbulences, energy transition is no longer about environmental protection only," Qin Yan, a principal analyst at ClearBlue Markets in Norway, told *The Innovation*: "It's also about energy security, and we expect nations to accelerate their steps in transitioning toward a greener energy structure so as to avoid being affected by international politics in the

future."

A comparative analysis of trends and trade-offs across eight major economies, conducted by a team led by Zhang Shan from the School of Applied Economics at Renmin University of China, reached similar conclusions.⁴ Analyzing energy security trends from 1990 to 2020 across the United States, Japan, China, India, the United Kingdom, Germany, France, and Brazil

using locally estimated scatterplot smoothing (LOESS) approaches, the study found that clean energy transitions are projected to strengthen energy security in most countries and mitigate vulnerability to external disruptions.

"The weaponisation of energy supply during geopolitical conflicts, volatility in global fuel markets, and growing competition over critical minerals and energy technologies have highlighted the vulnerabilities embedded in modern energy systems," wrote Peter Godfrey,⁵ Asia-Pacific managing director of the UK-headquartered Energy Institute (EI), based in Singapore, in an article titled "Why national security is reshaping the energy transition?"

"The global energy transition was once defined by energy security, affordability, and environmental sustainability. But a new era of geopolitical conflict has reshaped the energy trilemma, with national security the overriding priority," he wrote.

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DECLARATION OF INTERESTS

The author declares no competing interests.