



A Plan for Climate and the Environment, Seen from September 2026

Version 1.0 · Current as of September 2026 · specieslevel.com/plans/climate-and-environment.html

This plan is an initial draft prepared with AI models. It is open for review by subject-matter experts and will be revised as they join the work and as world and national events change.

Introduction

The best plan for climate change and environmental damage is to make the clean option the cheap, default option everywhere, rather than relying on sacrifice. Solar power, wind power, batteries and electric vehicles have already started to win on cost. The task now is to speed that shift up, cover the sectors where it hasn't happened yet, and protect the natural systems that human life depends on.

This essay has three parts. Part I sets out a ten-pillar plan, extends it to the wider environment beyond carbon, and discusses sequencing, political durability and the questions on which reasonable people disagree. Part II tests the plan against the world as it stands in September 2026. That month features a UN warning that 1.5°C of warming will likely be crossed within a few years, the largest oil supply shock in history, a sharp reversal of U.S. federal climate policy, a surge in electricity demand from AI data centers, and a UN climate summit (COP31) approaching in November. Part III draws those threads together into a revised set of priorities.

The 2026 events do not overturn the plan. They do change its emphasis. Some pillars have gained urgency, some have lost ground, and a few priorities need to move to the front.

Part I: The plan

The plan rests on ten pillars. Together they cover electricity, the rest of the energy system, heavy industry, fast-acting gases, land, economic signals, global finance, technology, adaptation and carbon removal.

1. Build clean electricity much faster

Clean electricity is the foundation, because most other sectors decarbonize by switching to it. The world should expand solar, wind and storage massively. It should also keep existing nuclear plants running, extend their lives, and support geothermal and next-

generation nuclear. These provide steady, around-the-clock power that complements variable renewables.

The real bottleneck is no longer technology cost but permitting and transmission. Queues to connect new projects to the grid, and approvals for power lines that can take a decade, now slow deployment more than equipment prices do. Streamlining environmental reviews and building interregional transmission lines are therefore among the highest-value climate policies available. Grids also need modernizing, with demand response and flexible pricing, so that cheap variable power is used when it is abundant rather than wasted.

2. Electrify almost everything

Once electricity is clean, the next step is to run as much of the economy on it as possible. In transport, that means electric cars, charging networks, and electric buses and trucks. It also means better public transit and zoning that allows walkable neighborhoods, which reduce car dependence altogether. In buildings, it means heat pumps, efficiency retrofits and clean building codes for new construction. In industry, electric heat can replace fossil fuels for low- and medium-temperature processes.

3. Tackle the hard sectors directly

Steel, cement, chemicals, aviation and shipping produce roughly a third of emissions and have no easy fix. Several tools can help. Governments can use their purchasing power through “buy clean” rules for public construction, which create guaranteed markets for low-carbon steel and cement. Clean hydrogen should be reserved for uses where it is truly needed, such as steelmaking, fertilizer and shipping fuels, rather than where direct electrification works better. Carbon capture belongs where no alternative exists, such as the process emissions released when limestone is turned into cement. Finally, governments should fund first-of-a-kind commercial plants. The gap between a working lab prototype and full commercial scale is where most climate technology stalls.

4. Cut methane now

Methane is the fastest lever on near-term warming. It is far more potent than carbon dioxide but breaks down within about a decade, so cutting it slows warming quickly. The oil and gas industry should find and fix leaks and end routine flaring, and much of this pays for itself because captured gas can be sold. Landfill gas should be captured and organic waste diverted from landfills. Livestock and rice emissions can be reduced through feed additives, better manure management and changes to how rice paddies are flooded.

5. Transform food and land

Stopping deforestation, especially of tropical forests, is essential. The most promising approach pays countries and communities for verified results and enforces supply-chain rules on commodities such as beef, soy and palm oil. Raising farm productivity lets more food come from less land. Supporting alternative proteins and reducing food waste, which amounts to roughly a third of all food produced, cuts pressure on land further. Restoring degraded land, wetlands and mangroves stores carbon and also buffers communities against floods and storms.

6. Get the economic signals right

Markets need to reflect the damage emissions cause. The central tool is a carbon price. Returning the revenue to households as dividends makes it fairer and more politically durable. Border carbon adjustments stop emissions from simply moving overseas to countries without a carbon price. Fossil fuel subsidies should be phased out, with the savings redirected to protecting low-income households. Mandatory disclosure of climate-related financial risk helps investors price that risk into their decisions.

7. Finance the developing world

Most future growth in emissions will come from emerging economies, and there the main barrier is the cost of capital, not technology. A solar farm in Nigeria typically pays far more to borrow than an identical one in Germany. The multilateral development banks should be reformed to lend more and accept more risk. Guarantees and tools that protect against currency risk can bring borrowing costs down. “Just transition” agreements can help coal-dependent countries move away from coal while protecting workers and public finances.

8. Invest in innovation

Public research funding should rise substantially for long-duration energy storage, advanced nuclear, clean fuels, better batteries, low-carbon materials and carbon removal. Prizes and advance purchase commitments, in which buyers promise to purchase a product once it meets specified criteria, can create markets for technologies that do not exist yet.

9. Adapt, because some warming is already locked in

Even with rapid cuts, the world will keep warming for some time. Adaptation measures include early-warning systems for extreme weather, heat action plans and public cooling centers. They also include stronger building codes and flood defenses, with nature-based options such as wetlands and mangroves preferred where they work. Drought-resistant crops and better water management protect food supplies. Insurance should price risk

honestly, and communities in the most exposed places should get support for managed relocation.

10. Add carbon removal later

Durable carbon removal methods should be developed now with rigorous verification. They include direct air capture, enhanced rock weathering and biochar. They will likely be needed later to deal with residual emissions and with any overshoot of temperature targets. They are a supplement to cutting emissions, never a substitute for it.

Beyond carbon: the wider environment

Climate is not the only way humans damage the environment, and the plan should cover the others too.

- **Biodiversity:** protect about 30% of the world's land and ocean by 2030. Prioritize the areas richest in biodiversity and respect Indigenous land rights.
- **Oceans:** end subsidies that drive overfishing, enforce catch limits and expand marine protected areas.
- **Pollution:** conclude a strong global plastics treaty that covers plastic production, not only recycling. Cut the nitrogen and phosphorus runoff that creates dead zones in rivers and seas. Clean up air pollution, which kills millions of people each year and often shares its sources with carbon emissions.
- **Circular economy:** pass right-to-repair laws, make producers responsible for their products at the end of their life, and design products for reuse.

Sequencing

The order of actions matters. This decade should focus on the measures that are cheap, proven and fast: methane cuts, ending deforestation, the clean power build-out, permitting reform, electrifying new cars and buildings, and fixing finance for developing countries. The 2030s should bring clean heavy industry at scale, electrification of most existing vehicles and buildings, and clean grids in most rich countries. In the 2040s and 2050s the world should reach net zero and then use carbon removal to deal with what remains.

What makes it stick politically

A plan that is reversed after the next election achieves little. Fairness is central. That means support for workers whose jobs change, investment in regions that depend on fossil fuels, and protection for low-income households against rising costs. Visible local benefits such as jobs, cleaner air and lower energy bills build lasting support. Policies that survive changes of government matter more than ambitious policies that are quickly undone.

Where reasonable people disagree

Several questions remain genuinely contested:

- How much to rely on nuclear power.
- Whether carbon pricing or subsidies and regulations should be the main tool.
- How much to rely on carbon capture and carbon removal.
- Whether growth-focused approaches are enough. Some ecological economists argue that rich countries need to consume less, an approach known as “degrowth.” Most mainstream analysts believe clean growth is feasible.

This plan takes a pragmatic stance: use every tool available and go after the cheapest emission cuts first. The debates are real, however, and thoughtful people land in different places on them.

For individuals, the highest-impact actions tend to be voting and advocating for these policies, and switching to electric options for home heating and cars when those need replacing anyway.

Part II: The plan in the world of September 2026

September 2026 tests every pillar of the plan at once. The seven developments below each bear on specific parts of it.

Overshoot is now the official expectation

The scientific framing shifted this year. A report from the UN Environment Programme (UNEP), released on 2 September, found that global temperature rise is set to cross 1.5°C, likely within the next few years. It also found that temperatures can still be brought back down later and the Paris Agreement goals achieved. The UN Secretary-General’s climate summit on 23 September went further, describing a new phase of the climate crisis in which overshoot is inevitable even as the energy transition accelerates.

Near-term weather will make this feel more real. The World Meteorological Organization expects El Niño conditions to strengthen through the autumn, peaking in November and December. A strong El Niño usually pushes global temperatures to new records the following year. The 2026 European heatwaves have been the deadliest weather event of the year, with more than 36,000 deaths recorded.

One counterpoint has circulated widely. For the first time since satellite records began in 1966, no Atlantic hurricane had formed by 12 September. This fits a known pattern, because El Niño tends to suppress Atlantic hurricanes. A single season is noise around the long-term trend, whichever direction it points.

What this means for the plan. Methane cuts (pillar 4) and adaptation (pillar 9) should move up. Methane is the fastest way to lower peak warming, and adaptation is no longer a hedge but a necessity. Carbon removal (pillar 10) also deserves more serious attention now, because “overshoot and return” means that carbon must eventually be pulled back out of the atmosphere.

The oil shock recasts clean energy as energy security

The biggest event of the year is not a climate event at all. In late February 2026, military conflict between the United States, Israel and Iran escalated. It led to the effective closure of the Strait of Hormuz, through which roughly a fifth of the world’s oil and liquefied natural gas normally passes. The International Energy Agency (IEA) called it the largest supply disruption in the history of the global oil market. Brent crude rose 65% in March alone, from roughly \$76 to \$126 per barrel. By late June, early diplomatic signals and a partial reopening of the strait had brought Brent down to around \$80, but disruption continued through the late summer.

This shock cuts both ways for the plan. On one side, it is the strongest argument yet for electrification (pillar 2). A country that runs on domestic solar, wind and electric vehicles cannot be blockaded. China is exporting that model: in June, new energy vehicles made up more than half of China’s monthly vehicle exports for the first time, as those exports rose 160% from a year earlier. The IEA reports that the crisis is reshaping global energy investment and accelerating diversification away from Middle Eastern supply routes.

On the other side, energy security panics also favor coal and domestic fossil fuels. China added 50.3 GW of coal and gas power capacity in the first seven months of 2026, the most for that period in 15 years. High fuel prices also make carbon pricing politically harder, as Europe’s experience shows below.

What this means for the plan. The case for clean energy should lead with security and affordability, not only with climate. That case has never been easier to make.

The United States steps back at the federal level

The U.S. federal government has reversed course on nearly every lever in the plan.

The first reversal is on tax credits. The One Big Beautiful Bill Act, signed in July 2025, ended federal tax credits for solar and wind projects that began construction after 4 July 2026, unless they are in service by 31 December 2027. That construction deadline has now passed. Household incentives are gone too: the Residential Clean Energy Credit for rooftop solar, home batteries and similar projects expired at the end of 2025. Significant incentives do remain for clean fuels, geothermal, hydropower, nuclear, fuel cells and energy storage.

The second reversal is on regulation. In February 2026, the Environmental Protection Agency (EPA) finalized its rescission of the 2009 Endangerment Finding, the determination that greenhouse gases endanger public health and welfare. That finding had been the legal foundation for federal greenhouse gas rules. The EPA argued that the Clean Air Act does not give it authority to set standards based on global climate concerns, and that costs had been ignored in 2009. Its reasoning would also remove its authority over emissions from power plants and industry. Seventeen health and environmental groups, together with 18 youth climate activists, have challenged the repeal in federal appeals court. The administration presents the repeal as removing costly regulation that Congress never authorized. Critics see it as abandoning settled science. The case will likely reach the Supreme Court.

What this means for the plan. In the United States, climate action shifts to states, utilities and markets. The repeal does not limit states' ability to regulate greenhouse gases in many cases. The federal support that remains happens to match the "clean firm power" part of pillar 1: nuclear, geothermal and storage. Those technologies have broader bipartisan appeal. The episode also illustrates the plan's point about durability. Subsidies and regulations that one party owns can be reversed within a few years.

AI data centers: new demand is running on gas

This is the most important new variable for pillar 1. Bank of America projects that data centers alone could add roughly 125 GW of U.S. electricity demand, pushing total demand growth to 4.1% a year from 2026 through 2030. After a decade of nearly flat electricity use, that is a dramatic change. The grid cannot connect these facilities fast enough, so developers have announced about 101 GW of natural gas generation built on-site at data centers, bypassing grid connection queues.

The emissions consequences could be large. Bloomberg data reported by Fortune suggest that 99 proposed gas plants for AI data centers could raise U.S. power-sector emissions by up to a third. The projects include some backed by leading AI labs, among them OpenAI and Anthropic. Anthropic makes Claude, the AI that drafted this essay, so it is not a neutral party on this point. Public backlash is growing as well. Texas Governor Greg Abbott recently paused approvals for new data centers.

What this means for the plan. This is the permitting and transmission bottleneck from pillar 1, made visible. Developers choose on-site gas because clean power cannot be connected in time. The fixes follow directly:

- Speed up grid connection for clean power paired with storage.
- Require or reward data centers that can reduce their power use at peak times.
- Use technology companies' purchasing power to fund clean firm power such as geothermal and nuclear.

- Make data centers pay for the grid upgrades they require, so household electricity bills do not absorb the cost.

China: a world-leading build-out with weaker targets

China remains the decisive country for global emissions, and its record this year is genuinely mixed.

The good news is scale. In the first six months of 2026, China added more wind capacity than it had in any full calendar year before 2025. Clean sources now make up more than half of its electricity generating capacity. In August, indicators pointed to a broad decline in its emissions across both the power and industrial sectors.

The bad news is ambition. China's new five-year plan for 2026 to 2030 sets a target of cutting carbon intensity (emissions per unit of GDP) by 17%. That is weaker than the previous plan and still allows total emissions to rise, and the plan sets no explicit cap on total emissions. New coal plants continue to be built.

The most instructive detail is about the grid. China's emissions grew 2% in the first quarter of 2026 because more wind and solar power was wasted: the grid could not absorb all of the clean power already installed.

What this means for the plan. Grid flexibility, storage and transmission are the binding constraint even where solar panels are cheap and abundant.

Europe holds its targets but softens carbon pricing

In March 2026, the European Union adopted a legally binding target to cut net greenhouse gas emissions 90% below 1990 levels by 2040. The target came with added flexibility, however. From 2036, international carbon credits may count for up to 5% of 1990 emissions. The new carbon market for fuels used in road transport and buildings, known as ETS2, was delayed by one year to 2028.

What this means for the plan. Europe's experience supports the plan's point that carbon pricing on household fuels is politically fragile. Returning the revenue visibly to households, as the EU's Social Climate Fund partly attempts, is essential rather than optional.

Plastics and multilateralism under strain

The plastics treaty, a key part of the plan's pollution agenda, remains stuck. Countries failed to agree at what were meant to be the final negotiating rounds, in December 2024 and again in August 2025. Informal meetings have continued through 2026, and the next formal session is expected at the end of 2026 or early 2027. The central divide is unchanged. A high-ambition coalition of European, African and small island states wants

to cap plastic production at its source. A group led by oil-producing states such as Saudi Arabia and Russia wants the treaty to focus on waste management.

COP31: an implementation summit

COP31, the 31st UN climate conference, will be held in Antalya, Türkiye, from 9 to 20 November 2026. A preparatory Pre-COP meeting hosted by Fiji, Tuvalu and Australia runs from 5 to 8 October. Under an unusual arrangement, Türkiye holds the presidency and Australia chairs the negotiations. Türkiye's action agenda includes zero waste, oceans, food security, climate-resilient cities, green industrialization, and clean energy and electrification. Those themes map closely onto several pillars of the plan.

The live fight is over money, especially for adaptation. UN Secretary-General António Guterres has called on developed countries to triple adaptation finance and make sure it reaches the people most at risk. With U.S. federal participation minimal, the most consequential open question for Antalya is probably whether other countries and the development banks can fill the gap (pillar 7).

Part III: Revised priorities and conclusion

The events of 2026 point to five adjustments to the plan.

1. **Lead with energy security.** The Hormuz shock makes domestic clean power and electrification the security choice. Framing the transition this way widens the coalition that supports it well beyond people motivated mainly by climate.
2. **Make grids the top priority.** Wasted wind and solar power in China, clogged connection queues in the United States, and gas plants built next to data centers all trace back to the same bottleneck. Transmission, storage and flexible demand deserve first claim on political attention.
3. **Plan for overshoot.** With 1.5°C likely to be crossed within a few years, methane cuts and adaptation finance should be pushed harder now. Carbon removal research should be funded now so it is ready to help bring temperatures back down later.
4. **Work where the momentum is.** While the U.S. federal government is out, progress depends on U.S. states, the European Union, China's build-out and large corporate buyers of power.
5. **Design for policy survival.** 2026 showed how quickly incentives can be reversed. Rebates that households can see, local jobs and real cost savings are what make climate policies hard to repeal.

The core logic of the plan survives the year intact. Clean energy keeps getting cheaper, electrification keeps spreading, and the tools for methane, land, finance and adaptation are well understood. What 2026 changes is the order and the framing. The world is now

planning for overshoot rather than avoiding it, the argument for clean energy is increasingly about security and cost, and the binding constraint has moved from the price of panels to the capacity of grids and institutions to connect, finance and sustain them.

This essay reflects reporting available as of late September 2026. Several threads could shift within weeks, including the situation in the Strait of Hormuz, the legal challenge to the Endangerment Finding repeal, and the outcome of COP31.

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