

Climate Action Tracker

**Wind and Solar benchmarks for a 1.5°C world**

**SOUTH KOREA**

February 2026



# Executive Summary

## Context

South Korea’s power system remains heavily reliant on fossil fuels, which accounted for approximately 61% of electricity generation in 2023. Coal and Liquefied Natural Gas (LNG) are the dominant pillars, [contributing 34% and 26%](#) respectively. As the world’s [fifth-largest](#) LNG importer and a major coal consumer, South Korea is highly vulnerable to global price volatility and supply chain disruptions. This dependence is exacerbated by the country’s "energy island" status, as it lacks land-based power interconnections with neighbouring nations.

Renewable energy (RE) has grown slowly, reaching almost 8% share of the electricity generation mix in 2023, with solar PV serving as the primary driver at 5%. The government’s [11th Basic Plan for Electricity Supply and Demand](#) (finalised Feb 2025) establishes a target of 21.7% renewable electricity by 2030, but significantly pivots toward "Carbon-Free Energy" sources (CFE), aiming for [70.7%](#) of power to come from CFE sources (including nuclear and clean hydrogen/ammonia in addition to renewables) by 2038.

In this report, we look at national studies and global energy system models to assess how much South Korea’s wind and solar capacity needs to grow to align with the global goal to triple renewables by 2030 and the Paris Agreement’s 1.5°C warming limit.

## Key findings

- ▶ South Korea’s solar generation needs to grow eightfold by 2030 and wind tenfold to align with 1.5°C. This equates to 280 TWh of wind and solar generation in 2030, up from 46 TWh in 2023.
- ▶ Around 165 GW of new wind and solar would be needed by 2030 (148 GW solar, 17 GW wind). This would require average annual capacity additions of 20 GW/yr of solar and 2 GW/yr of wind from 2023-2030.
- ▶ South Korea’s current rollout of wind and solar is not progressing fast enough to achieve this. Under current policies and market conditions, roughly a third of solar (27%) and around 33% of wind needed to align with 1.5°C will be installed by 2030.





## Context

At COP28, governments agreed to triple global renewable capacity by 2030 globally to stay in line with 1.5°C. This report highlights the potential implications of this COP28 decision at the national level, focusing on [South Korea](#).

Wind and solar deployment is accelerating around the world. However, expected wind and solar capacity deployment under current policies falls short of what is needed for 1.5°C, and is concentrated mainly in a few regions.

Research is needed to understand the pace of wind and solar deployment that aligns with the highest plausible ambition and is compatible with 1.5°C

This project aims at answering the following questions:

- ▶ **How much wind and solar generation is needed (TWh) at the national level?**
- ▶ **How much wind and solar needs to be built (GW of capacity)?**
- ▶ **When does it need to be built by, and how quickly?**

## Policy context

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South Korea's [2030 Nationally Determined Contribution](#) (NDC) is to cut greenhouse gas (GHG) emissions by **40%** below 2018 levels by 2030. Its [2035 NDC](#) targets a reduction of **53% to 61%** below 2018 levels by 2035, with the ultimate goal of reaching net-zero GHGs by 2050.

South Korea also aims to reach at least 21.7% of renewables in electricity generation by 2030, up from approximately 8% in 2023. The country finalised its [11th Basic Plan for Long-term Electricity](#) in 2025, establishing national decarbonisation goals driven in part by the buildout of renewable energy generation. The document aims for a quadrupling of the share of renewable energy generation by 2038, equivalent to 33% of total generation.

Additionally, South Korea aims for a complete coal phase-out by 2040. During the 30th UN Climate Summit (COP30) in 2025, the government officially joined the [Powering Past Coal Alliance](#), committing to remove 40 of its existing 61 coal power plants by 2040 and stop building new facilities. The remaining 21 facilities are under review for phase-out and replacement by alternative generation sources.

Under current policies and market conditions, the [IEA estimates](#) that solar capacity in South Korea will reach 50 GW in 2030, up from 32 GW in 2023. Meanwhile, wind capacity is projected to reach 6 GW in 2030, up from 2 GW in 2023.

## National enabling factors

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Key enabling factors for ambitious wind and solar rollout include:

- ▶ **Institutional capacity.** A rapid build-out of wind and solar will require the governance and institutional capacity to develop, implement and enforce policy frameworks.
- ▶ **Just transition.** A just transition will be needed to take along all stakeholders, particularly those employed by the fossil economy.
- ▶ **Grid development.** Substantial increases in both transmission and distribution grid infrastructure will be necessary to integrate large-scale new wind and solar generation into the power system.
- ▶ **Fossil fuel phase-out.** Existing fossil fuel infrastructure often will need to be retired earlier than its economic lifetime. Policies need to be developed to achieve the early phase out of fossil fuel plants.
- ▶ **System flexibility.** Energy storage (diurnal and seasonal), flexible generation technologies such as hydro and geothermal, and increased demand side flexibility will all be crucial.
- ▶ **Market design.** Reform of market designs and regulation adapted to renewable energy-based systems that incentivise and mobilise investments to install renewable energy at the scale needed (e.g., minimise cost of capital, ensure revenue certainty, etc).

## Stages of power sector decarbonisation

■ Current WnS generation 
 ■ Fossil fuel generation 
 ■ WnS generation to cover the phase out of FF 
 ■ WnS generation to meet demand growth 
 ■ Non-WnS clean generation

The stages of the electricity system transition in South Korea

WnS = Wind and Solar

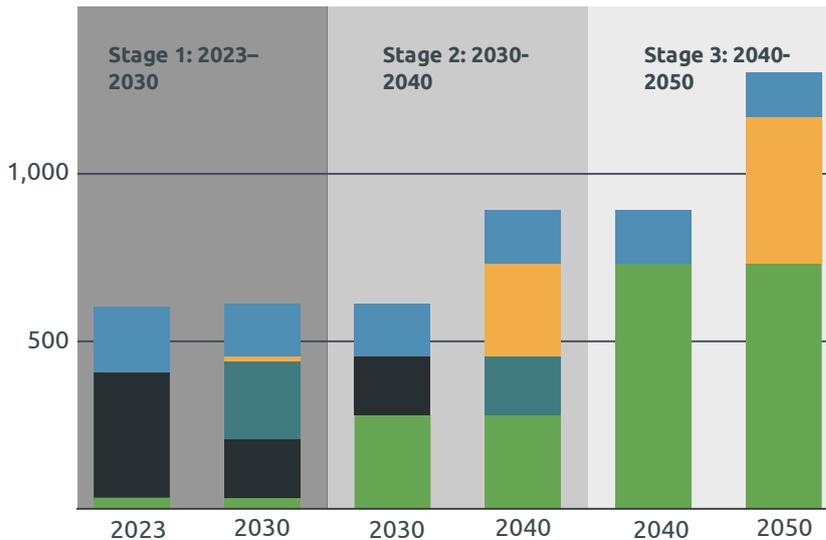


Figure 1 – Electricity generation in each stage in TWh

In a 1.5°C pathway, countries must add solar, wind, and other clean technologies to meet rising power demand while replacing phased-out fossil fuels. The evolution of the power capacity mix over successive decades varies across countries.

From now until 2030, South Korea would need to add 1 GW of wind and 7 GW of solar capacity to meet growing demand alone. Another 16 GW of wind and 140 GW of solar will be needed to displace the share of fossil fuels in the electricity generation mix.

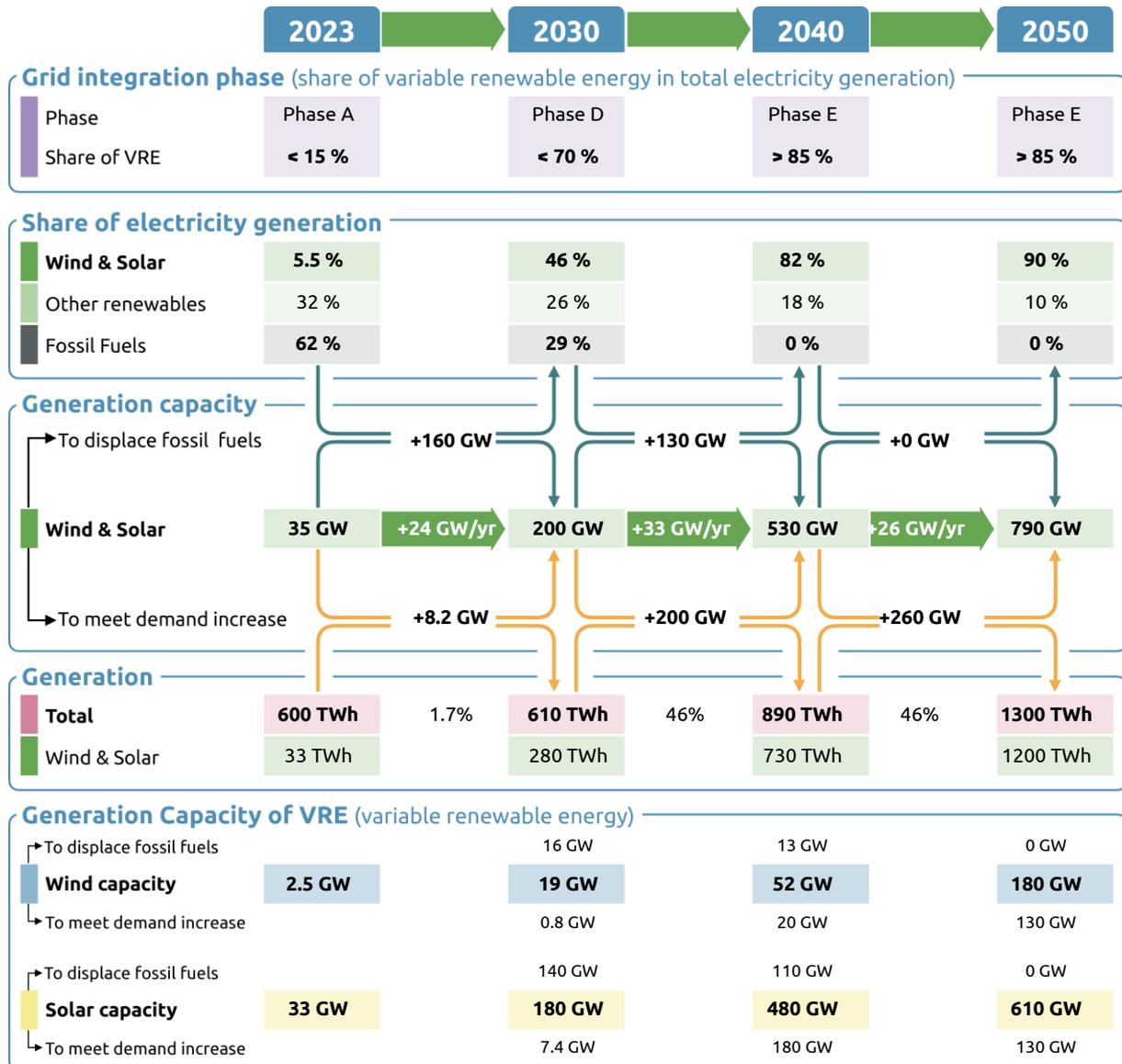
Power sector transformation and the increasing participation of variable renewable energy (VRE) – mainly wind and solar – in a country’s power mix gives rise to a set of technical challenges linked to the integration of VRE sources. Six phases can be distinguished here, from phase 0 (pre-development with negligible amount of VRE shares) to phase E (with over 80% VRE shares). More information about these phases can be found in Annex A.

Meeting the benchmarks for 2030 will put South Korea in Phase D, with wind and solar making up 46% of the generation mix. Periods in which VRE availability exceeds demand occur more frequently than in earlier phases.

Ensuring system stability while continuing to increase renewable penetration requires additional measures, such as expanded demand response, stronger interconnections and large-scale energy storage. Market design and regulatory frameworks become increasingly important to enable these solutions. Although particularly critical in this phase, many of these measures should begin in earlier phases (B and C) to provide long-term investment signals and facilitate a smoother system transformation.

Figure 1 and Table 1 both show the stages of the transition to a decarbonised power sector in terms of the volumes of existing wind and solar and what is needed to displace fossil fuels and meet demand increases. Figure 1 shows the stages in terms of electricity generation, and Table 1 shows it in terms of generation, capacity and share of the electricity mix.

Table 1: Stages of the electricity system transition detailing how much generation capacity of wind and solar will be needed to displace fossil fuels in the system and meet growing electricity demand



Note: Numbers are rounded to two significant figures, which may contribute to minor differences in totals. The calculations assume that wind, solar, and other renewables contribute equally and proportionally to displacing fossil fuels and meeting demand growth.

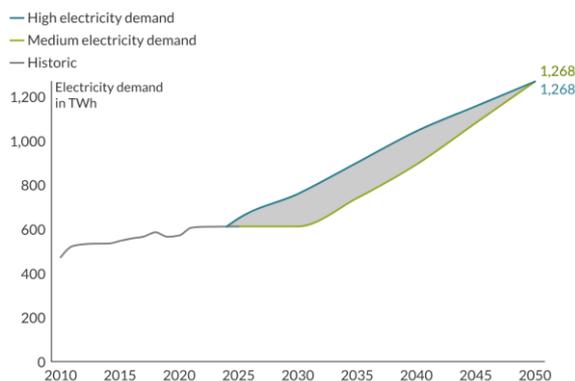
## Future electricity demand

For South Korea, our power system modelling shows limited sensitivity to wind and solar costs. In particular, there is a very low-cost resource potential for solar PV which is cost-effective to access across a wide range of plausible solar PV costs. Therefore, we do not see the same spread of wind/solar deployment across cost ranges.

However, this does not mean that only one wind/solar rollout is possible or desirable in South Korea. To explore a range of possible wind and solar rollouts, we look at different electricity demand levels and different paces of fossil fuel phase-out to capture a range of possible wind/solar rollouts.

Electricity demand for the 'High demand' scenario is taken from the [Agora Energiewende study \(K-Map 2.0\)](#). Total electricity generation in 2030 is projected at 759 TWh. Relative to the 2023 level, demand grows 1.7x by 2040 (1,043 TWh) and reaches 2.1x growth by 2050 (1,268 TWh). This projection assumes a front-loaded increase in demand driven by the accelerated electrification of the industrial and transport sectors, as well as significant power inputs required for domestic green hydrogen production.

Electricity demand for the 'Medium demand' scenario is extracted from the [study](#) published in *Energies*. In this scenario, total electricity generation in 2030 is projected at 612 TWh (aligned with South Korea's NDC Enhancement Plan).



Electricity generation grows between 77%-89% in South Korea by 2050

The solid line shows the electricity generation projection used to develop the benchmarks

Figure 2 – Total electricity generation in TWh

## Pace of fossil fuel phase-out needed

The rate of fossil phase-out is set by the overlap between country-level studies, downscaled 1.5°C-compatible global pathways and the global milestones of the [IEA's Net Zero roadmap](#), in which South Korea achieves a clean power system by 2040.

To align with 1.5°C, fossil fuels must exit the South Korea power sector before 2040. Fossil fuel generation falls by 32 to 53% between 2023 and 2030.

Electricity generation from fossil fuels in South Korea is currently declining. Coal-fired generation peaked in 2018 and fossil gas in 2021. A continued and faster paced decline of both fuels is required to reach a full phase-out by 2040.

## To align with 1.5°C, fossil fuels must exit the power sector in South Korea by 2040, even as electricity demand grows rapidly

South Korea would need to achieve clean electricity by 2040

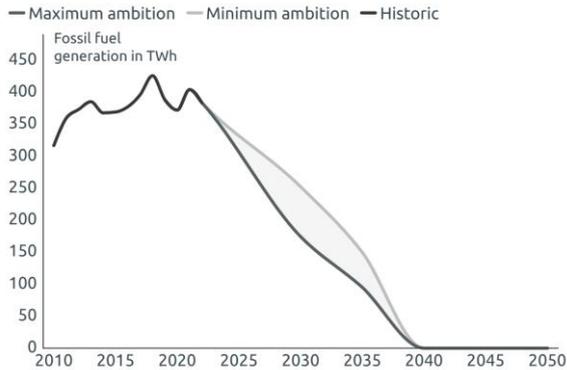


Figure 3 – Fossil fuel generation in TWh

Coal use peaks in 2018 and gas peaks in 2021 in South Korea

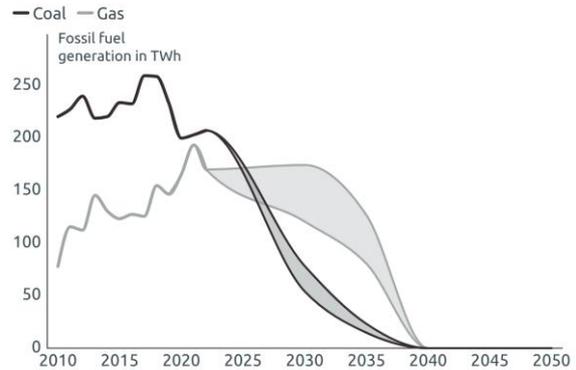


Figure 4 – Fossil fuel generation by fuel type in TWh

## The role of other clean electricity generation

While wind and solar will be the workhorse of the energy transition, other clean electricity generation may play a role. We estimate the role of non-wind and solar clean electricity generation\* (largely hydro, biomass, nuclear and geothermal) from country-level studies.

In our modelling, we assume that generation from clean technologies other than wind and solar in South Korea would reach 158 TWh by 2030 and 134 TWh by 2050.

This generation is provided largely from nuclear and complemented by hydro.

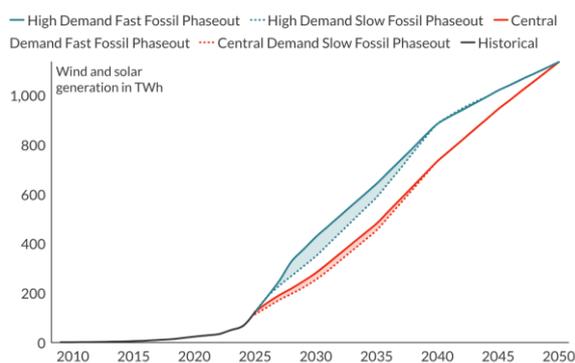
## Total wind and solar generation needed to align with 1.5°C

The wind and solar rollout is then calculated by combining projected electricity demand growth, the fossil phase-out necessary to align with 1.5°C, and the assumed generation from other clean technologies.

To align with 1.5°C, **wind and solar generation in South Korea would need to reach between 254 and 427 TWh by 2030**. Generation in 2023 was 46 TWh. This is therefore a 5.5 to 9.3-fold growth in wind and solar.

Wind and solar provides 37–57% of overall electricity generation in 2030, and 89% of overall generation in 2050. A grid powered almost entirely by wind and solar would require substantial rollout of batteries and energy storage, support from dispatchable generation such as hydro and geothermal, flexible demand and grid extension to ensure reliability of the system.

\* We do not consider CCS in the power sector, as we do not consider CCS a [viable source of large-scale emissions reductions in the power sector](#).



Electricity generation from wind and solar grows 23 times in South Korea by 2050

Figure 5 – Wind and solar electricity generation in TWh

## To align with 1.5°C, wind and solar generation would need to grow rapidly in South Korea

In a low demand scenario for electricity, wind and solar need to comprise over 37% of total generation by 2030

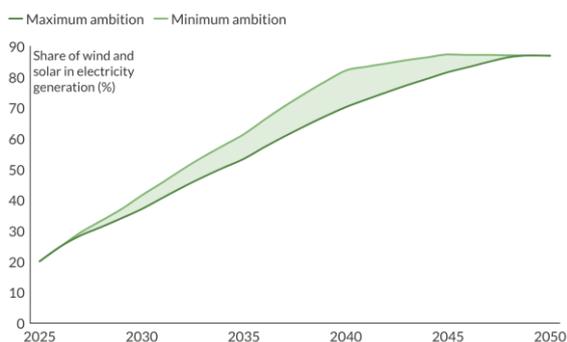


Figure 6 – Wind and solar electricity generation share (%) in a low-demand scenario

In a high demand scenario for electricity, wind and solar need to comprise 56% of total generation by 2030

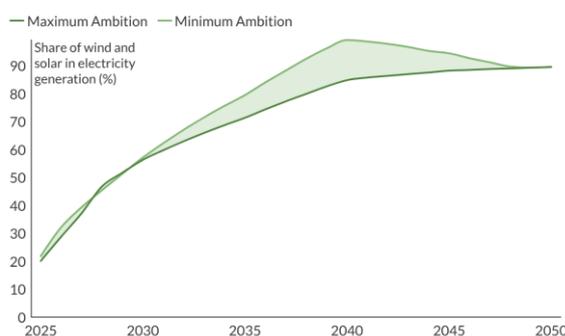


Figure 7 – Wind and solar electricity generation share (%) in a high-demand scenario

## Possible splits between wind and solar

The relative share of wind and solar deployment will vary depending on how various factors develop in the future. We explore one key uncertainty, the relative cost of solar and wind electricity generation (see [methods](#)). When accounting for this uncertainty, we see a range of possible future generation mixes between wind and solar.

We highlight the median of the range as our **central benchmark**, but do not suggest that this is the only possible breakdown into wind vs. solar. The model includes a simplified representation of the power grid and does not fully capture transmission constraints, spatial effects, curtailment, or detailed integration costs. These factors could influence the relative balance between wind and solar in practice.

In the central scenario, **South Korea would need to reach nearly 200 GW of combined wind and solar total installed capacity by 2030 to align with the 1.5°C temperature limit** (comprising 179 GW of solar and 19 GW of wind). By 2050, total wind and solar capacity would need to reach nearly **800 GW**. Both wind and solar become major pillars of the electricity mix by 2050, though solar remains the primary contributor (providing 725 TWh compared to wind's

409 TWh). Solar ramps up more rapidly in the near-term, providing over **six times** the electricity generation of wind by 2035.

Importantly, these are cost-optimised modelled pathways that give a useful indication of the pace and scale of wind and solar deployment needed for 1.5°C, but they cannot fully capture real-world context, where industry development, supply chains, workforce, and infrastructure will require stable and sustained development.

### South Korea needs to reach almost 200 GW of wind and solar installed capacity by 2030 to align with 1.5°C

Solar capacity in South Korea would reach 179 GW by 2030 in a 1.5°C-aligned scenario

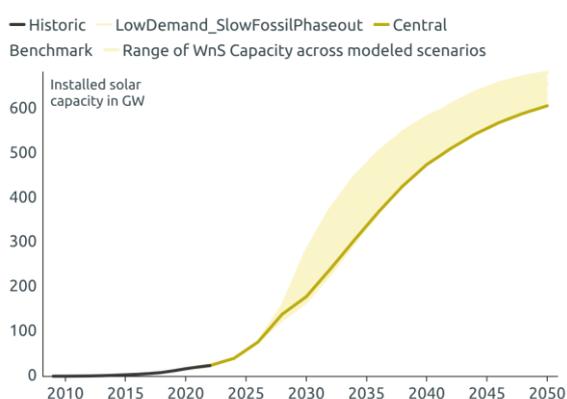


Figure 8 – 1.5°C compatible capacity benchmarks for solar in GW

Wind capacity in South Korea would reach 19 GW by 2030 in a 1.5°C-aligned scenario

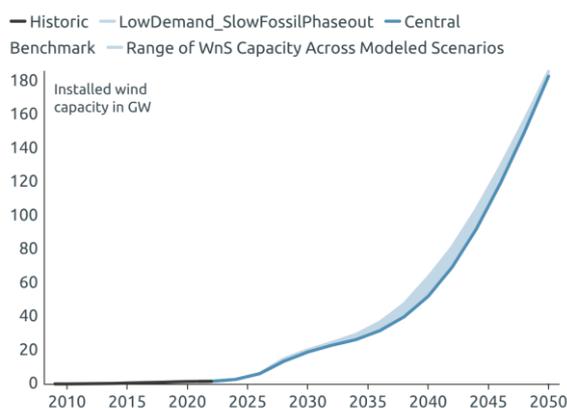


Figure 9 – 1.5°C compatible capacity benchmarks for wind in GW

The following table shows the wind and solar deployment needed to align with the central 1.5°C compatible benchmark produced. 2023 is historical data. All benchmark data from 2030 onwards is reported to two significant figures.

Table 2: Wind and solar electricity generation and capacity (2023–2050)

Scenario	Variable	Unit	2023	2030	2035	2040	2050
<b>Central 1.5°C benchmark</b>	Solar generation	TWh	41	240	440	610	730
<b>Central 1.5°C benchmark</b>	Wind generation	TWh	5	45	70	130	410
<b>Central 1.5°C benchmark</b>	Solar capacity	GW	32	180	340	480	610
<b>Central 1.5°C benchmark</b>	Wind capacity	GW	2	19	29	52	180

Table 3: Benchmarks translated into CAT format

Variable	Ambition	Unit	2030	2035	2040	2045	2050
Share of coal	Minimum	%	10	1	0	0	0
	Maximum	%	7	1	0	0	0
Share of gas	Minimum	%	23	15	0	0	0
	Maximum	%	16	10	0	0	0
Share of renewables	Minimum	%	49	70	89	91	94
	Maximum	%	59	76	89	91	94
Share of wind and solar	Minimum	%	41	61	82	87	90
	Maximum	%	46	65	82	87	90

## Comparison to current rollout and country target

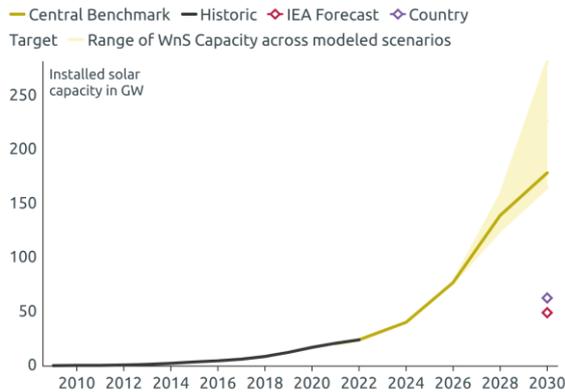
Under [current policies and market conditions](#), deployment of wind and solar PV in South Korea is not aligned with a 1.5°C pathway. There is a significant capacity gap in 2030 between the current rollout and the 1.5°C-compatible benchmarks: **130 GW** of solar PV and **13 GW** of wind are missing. Forecasted solar and wind capacity in 2030 must increase by **3.6 times** and **3.1 times**, respectively.

The government's 11th Basic Plan for Long-term Electricity sets a target of 21.7% renewables by 2030. Furthermore, this document sets a national capacity target of 63 GW of solar and 18 GW of wind by 2030, but current policy projections fall short of meeting this domestic milestone. Under existing policies for building out WnS capacity, South Korea is expected to achieve 79% of solar and 33% of wind capacity targets by the end of the decade.

Further action will be needed to drive wind deployment in **South Korea** at the pace required to bridge this gap and meet the 1.5°C benchmark of nearly 200 GW of combined variable renewable capacity by 2030.

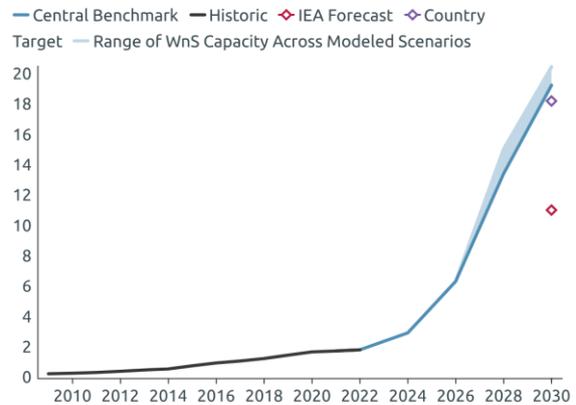
## South Korea's wind and solar rollout needs to accelerate to align with 1.5°C

In South Korea, the current solar energy rollout is well behind 1.5°C-aligned levels



**Figure 10** – Installed solar capacity in 2030 compared to targets and current policy projections in GW

In South Korea, the current wind energy rollout of wind is well behind 1.5°C-aligned levels

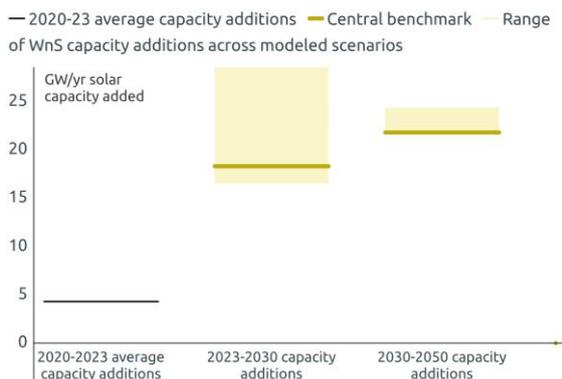


**Figure 11** – Installed wind capacity in 2030 compared to targets and current policy projections in GW

*Note: The target data was last pulled from [Ember](#) in January 2025. The current policies data was last pulled from the [IEA](#) in February 2026.*

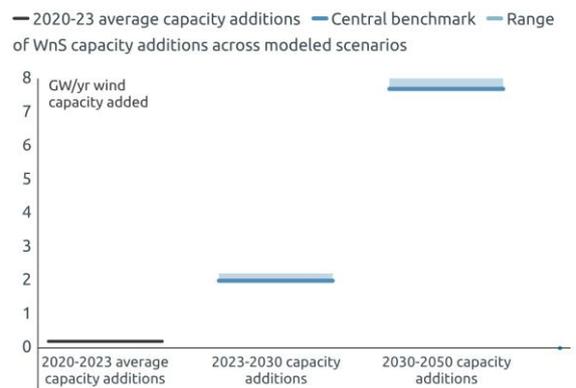
## Wind and solar capacity additions in South Korea need to accelerate to align with 1.5°C

South Korea would need to add on average 20 GW/yr of solar capacity until 2030, and 22 GW/yr over 2030–2050, compared to 4.3 GW/yr from 2020–2023



**Figure 12** – Solar capacity additions per year in GW/y

South Korea would need to add on average 2 GW/yr of wind capacity until 2030, and 8 GW/yr over 2030–2050, compared to 0.2 GW/yr from 2020–2023



**Figure 13** – Wind capacity additions per year in GW/y

## Comparison with other studies

We compare the wind and solar generation seen in our analysis to that in the literature review of country-level studies. In the Figures below (Fig 14 and Fig 15) we highlight the potential generation for both solar and wind for the Central scenario (in bold) as well as the other scenarios evaluated (in lighter shade) with projections from other key literature (in black dots). This includes studies from [NEXT group](#), [Agora](#), [Institute of Sustainable futures](#) and other academic publications.

We note that in comparison to other literature, our benchmarks push for more ambition for solar whereas for wind the comparison is more balanced (particularly in the 2050 period). These differences are primarily a result of different modelling approaches and ambition levels a full detail of which, is too expansive to be covered in this brief.

### Our benchmarks are broadly aligned with the literature

Electricity generation from solar: comparison with literature in South Korea

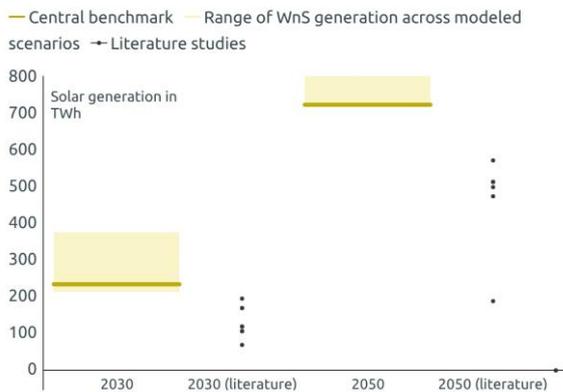


Figure 14 – Solar electricity generation in TWh

Electricity generation from wind: comparison with literature in South Korea

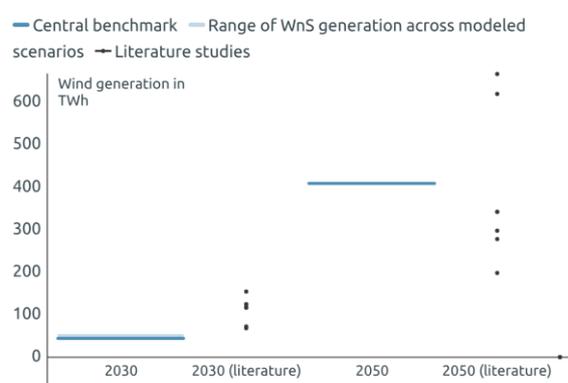


Figure 15 – Wind electricity generation in TWh

### In South Korea, our benchmarks generally suggest that solar will provide more generation than wind

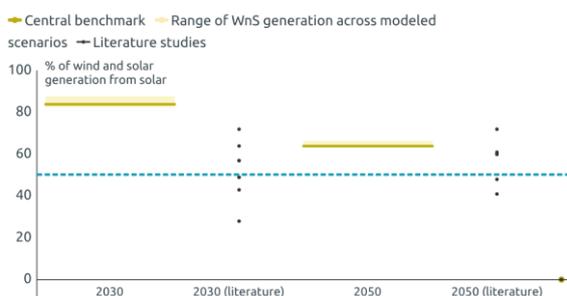


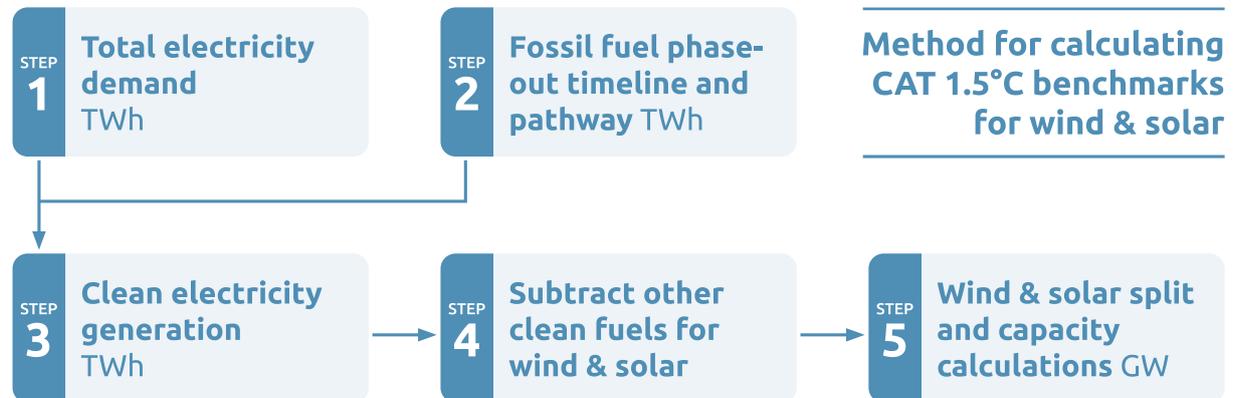
Figure 16 – Generation split between wind and solar (%)

Share of wind and solar generation that comes from solar: comparison with literature in South Korea

The area above the blue dashed line represents a power system in which solar provides more electricity generation than wind



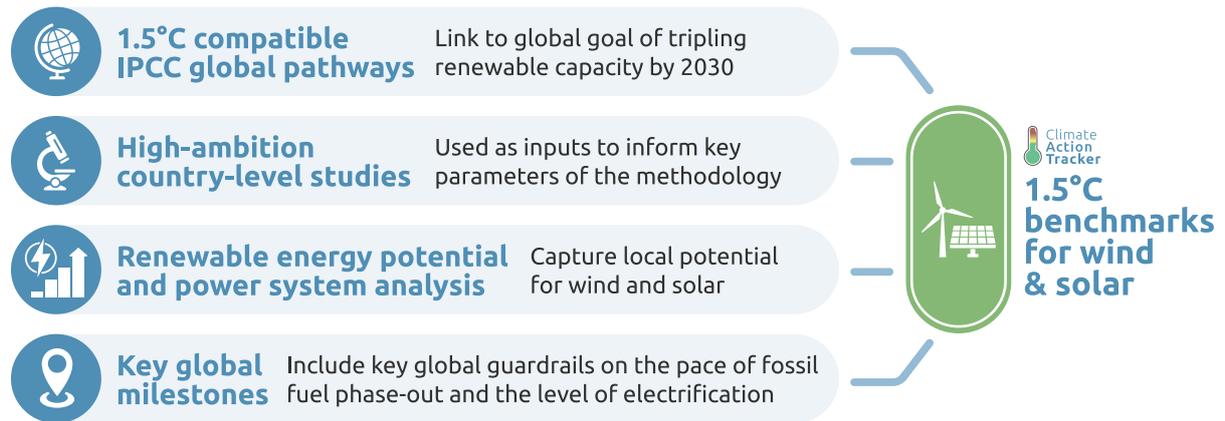
## Summary of our method



Our method takes a series of steps to calculate the wind and solar generation needed for 1.5°C, and the resulting capacity deployment. The key methodological steps are highlighted below.

1. We project future electricity demand in the country.
2. We calculate the pace of fossil fuel phase-out needed to align with 1.5°C.
3. Bringing these trajectories together defines the level of clean electricity generation required to meet electricity demand growth while phasing out fossil fuels in the power sector.
4. We project non-wind and solar clean electricity generation based on country-level literature. This allows us to identify the wind and solar generation necessary to align with 1.5°C.
5. Having produced this wind and solar generation trajectory, we feed it into a simplified electricity system model (PyPSA), which calculates for a given set of cost assumptions around wind and solar, a split into wind versus solar and the associated capacity requirements.

## Overlap of different elements



Our method focuses on the overlap between different elements. By looking at the range of fossil fuel phase-out which is outlined in both high ambition country-level studies and downscaled 1.5°C compatible global pathways, and is informed by key global milestones, we identify benchmarks which are both consistent with a global least cost pathway to limiting warming to 1.5°C but are also aligned with national-level modelling.

Combining multiple different analytical elements can help identify the most robust path to achieving a zero-carbon energy system.

For more details see the [Methods Annex](#).

## List of scenarios selected

Table 4: Country level studies for South Korea

Study	Publication	Scenario selected
<a href="#">LBNL, NEXT Group (2025)</a>	A clean energy Korea by 2035: Transitioning to 80% carbon-free electricity generation	
<a href="#">Agora, NEXT Group (2024)</a>	2050 Climate neutrality roadmap for Korea	K-map scenario 2.0
<a href="#">Min and Kim (2024)</a>	A Practical Framework for Developing Net-Zero Electricity Mix	A Case Study of South Korea
<a href="#">Behrendt et al. (2025)</a>	Evaluating a High Ambition Pathway for Decarbonization in the Republic of Korea	High Ambition pathway
<a href="#">Hong et al. (2019)</a>	Long-term energy strategy scenarios for South Korea: Transition to a sustainable energy system	VTS - Visionary Transition Scenario
<a href="#">Park et al. (2013)</a>	An analysis of long-term scenarios for the transition to renewable energy in the Korean electricity sector	Sustainable Society (SS)
<a href="#">Moon et al. (2024)</a>	Implementation cost of net zero electricity system: Analysis based on Korean national target	
<a href="#">Park et al. (2019)</a>	Assessment of future renewable energy scenarios in South Korea based on costs, emissions and weather-driven hourly simulation	Suggested Scenario (SU)
<a href="#">Institute for Sustainable Futures (2023)</a>	Net-zero 1.5 °C sectorial pathways for G20 countries: energy and emissions data to inform science-based decarbonization targets	



### Phases of grid integration

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The grid integration phase is adapted from a [de Vivero et al. report](#) detailing a qualitative assessment framework for power system transformation and an [IEA report](#) on integrating solar and wind. We use the share of VRE sources in electricity generation to classify countries into a phase. More information about the characteristics and key challenges of each phase can be found in the report.

**Phase 0** (less than 5% annual VRE share): we assign this phase when wind and solar make up 0-5% of a country's electricity generation mix. Installed VRE capacity is limited, and the impact on power system operation is negligible. Integration does not require significant operational or structural changes.

**Phase A** (between 5% and 15% annual VRE share): we assign this phase when wind and solar make up 5-15% of a country's electricity generation mix. Conventional power system operation remains largely sufficient for day-to-day system management. However, system planning must anticipate higher future VRE shares. This includes improving forecasting tools, integrating forecasting into dispatch decisions and moving toward shorter scheduling intervals and more real-time system operation.

**Phase B** (between 15% and 25% of annual VRE share): we assign this phase when wind and solar make up 15-25% of a country's electricity generation mix. The contribution of VRE varies significantly over time, with periods of very low output and periods of high penetration. This variability increases the need for operational flexibility. Enhanced coordination between system operators, network operators, and distribution system operators becomes critical to maintain system efficiency and security.

**Phase C** (between 25% and 40% of annual VRE share): we assign this phase when wind and solar make up 25-45% of a country's electricity generation mix. Periods in which VRE dominates system behaviour become increasingly frequent. A key operational challenge is maintaining system stability during sudden disruptions in supply or demand. Curtailment of VRE may become necessary to preserve system security. Without structural adjustments, integration constraints of VRE into the system may slow further increases in renewable energy shares despite additional installed capacity.

**Phase D** (between 40% and 70% of annual VRE share): we assign this phase when wind and solar make up 45-80% of a country's electricity generation mix. Periods in which VRE availability exceeds demand occur more frequently than in earlier phases. Ensuring system stability while continuing to increase renewable penetration requires additional measures, such as expanded demand response, stronger interconnections and large-scale energy storage. Market design and regulatory frameworks become increasingly important to enable these solutions. Although particularly critical in this phase, many of these measures should begin in earlier phases (B and C) to provide long-term investment signals and facilitate a smoother system transformation.

**Phase E** (more than 70% share of annual VRE share): we assign this phase when wind and solar make up 80-100% of a country's electricity generation mix. The power system reaches very high VRE penetration. The primary challenge becomes ensuring adequacy during extended periods of low wind and solar availability. Addressing this requires long-duration energy storage, sector coupling allowing for export and import of power between economic sectors in the same country and extensive electricity trade both within regions and between countries.

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## The Consortium



The Climate Action Tracker (CAT) is an independent scientific analysis produced by three research organisations tracking climate action since 2009. We track progress towards the globally agreed aim of holding warming well below 2°C, and pursuing efforts to limit warming to 1.5°C.

[climateactiontracker.org](https://climateactiontracker.org)



Climate Analytics is a non-profit institute leading research on climate science and policy in relation to the 1.5°C limit in the Paris Agreement. It has offices in Germany, the United States, Togo, Australia, Nepal and Trinidad and Tobago.

[climateanalytics.org](https://climateanalytics.org)



NewClimate Institute is an independent non-profit organisation that develops solutions to tackle climate change and drives their implementation worldwide. Through research, policy advice and knowledge sharing, we aim to raise the ambition for climate action and support sustainable development.

[newclimate.org](https://newclimate.org)