

A SUSTAINABLE & INTERCONNECTED MEDITERRANEAN REGION



**DRIVING THE ENERGY TRANSITION
INTO MEDITERRANEAN COUNTRIES
FOR A SUSTAINABLE AND
PROSPEROUS FUTURE**



The Energy Union strategy adopted by the Commission implies a strong regional dimension to achieve its objectives. Such a flexible cooperation between EU Member States should follow a variable geometry approach and be organised around “natural” regions such as Northern Seas, the Baltic Sea, South-Eastern Europe, Central-Western Europe and the Mediterranean region. A coalition of MEPs already published manifestos presenting ideas to foster such a regional cooperation in the Northern Seas (January 2016) and in South-Eastern Europe (June 2016)¹. The current documents tries to do the same for the Euromed region.

1 A region facing climate threats, power cuts and geopolitical instabilities

Granted with **natural resources** (wind but above all sun), the Mediterranean region has a tremendous potential for the development of an energy transition. Efforts should must be undertaken to achieve this goal in a regional perspective, as the Union for the Mediterranean (UfM) recalls in its Ministerial declaration in Rome co-signed by the UfM and the EU on December 1st, 2016, acknowledging “the added value that a regional and holistic approach can deliver in addressing the energy challenges facing the Euro-Mediterranean Region”².

In order to do this, EU Mediterranean Members States and Southern Mediterranean³ have common strengths but also **common weaknesses**. They are particularly vulnerable for different reasons:

- **Desertification**, widely present in this region, threatens its environmental safety⁴. While the European Mediterranean countries are covered by zones concerned with desertification up to 33,8%, Eastern and Southern Mediterranean countries count 61,3% of their territory with desertification issues⁵. Climate change will worsen this tendency. It will affect availability of water and risks to enhance the conflict for access to water between growing urban populations, water intensive agricultural and cooling water needs of conventional power plants. Heat waves and other extreme events (heavy concentrated rainfalls) are also mentioned by climate scientist as highly likely and need to be anticipated by climate adaptation policies.

- The region suffers from a sharp **increase in demand of electricity**: Southern Mediterranean countries account for 7% of the world population and they consume about 8% of the world’s primary energy demand. The Mediterranean energy observatory (OME) has forecast annual increases in consumption of up to 6% per year by 2025 in SEMCs. Demand for electricity is constantly rising under the pressure of demographics, industrialization but also the purchase of millions of inefficient consumer goods (white goods, air condition, and electronics). This unsustainable high growth rate in energy demand is also at the basis of the electricity security of supply problems which notably Egypt has to cope with. And growing urban sprawl will not only make high quality public services like access to housing, water, energy, transport difficult but also impact the air pollution and related health problems.
- **Oil and gas resources of the regions are highly concentrated** into three countries: Algeria, Libya and Egypt, raising a problem of energy **dependency**. The region faces **a scarcity of fossil fuels reserves**. Algeria, where domestic gas consumption is growing strongly, cannot expand its exports anymore, what has a huge budgetary and social impact. Libya only shows a 50 years reserves’ potential and needs, beyond its short term to think about the longer-term income perspectives. Within these conditions, the Mediterranean region could import more than 40% of their needs in oil and 30% in gas by 2030. A consequence of the Paris climate agreement it that the Mediterranean region should avoid to import and burn coal, as such a strategy would dramatically increase its greenhouse gas emissions. In addition to the negative environmental impacts of fossil fuels, the need for fast deployment of renewables sources is therefore obvious for energy security reasons and could provide new economic opportunities.
- **Differences between the Southern part and the Northern part of the Mediterranean** exist as well as between the Western Southern part and the Eastern Southern part in terms of **interconnections** and renewable energy development. For the whole region to be sustainable and safe from scarcity, interconnections are necessary in the region itself but within Europe too.

These combined phenomenon would have **several damaging effects**:

- If the final energy consumption double and electricity consumption triples⁶ by 2040 in the Southern Mediterranean countries as the Mediterranean energy observatory (OME) “business as usual scenario” shows⁷, **carbon dioxide emissions** would increase by 45% for the whole region and more than double in the South Mediterranean. This pathway is obviously not compatible with the commitment of the Paris Agreement to maintain global warming well below 2°C, and pursue efforts to limit it to 1,5°C.
- **Political tensions** could also emerge from this situation. Domestic and intra-regional migrations would indeed increase as climate change happens, hence potentially creating internal tensions in the region. The last year has shown the potential disruptive effect on the whole Europe of the failure to bring an answer to the millions of people without perspectives for a decent life living on the Southern bank of the Mediterranean region and even beyond in sub-Saharan countries. Energy policy is probably one of the most important policies tackling the basic causes of the massive displacement of populations.

The increased and fast deployment of energy efficiency, renewable energy sources and interconnectivity is not any longer a wishful thinking but a societal and political must for conflict prevention.

¹ See respectively “Northern Seas as the Power House of North-Western Europe” and “South-Eastern Europe: more than just a gas corridor, a lighthouse for Europe”.

² UfM Ministerial Declaration on Energy, Rome on 1 December 2016.

³ Includes 8 EU Mediterranean Member States (Spain, France, Italy, Slovenia, Croatia, Greece, Cyprus and Malta) and 15 Southern Mediterranean, African and Middle Eastern countries (Albania, Algeria, Bosnia and Herzegovina, Egypt, Israel, Jordan, Lebanon, Mauritania, Monaco, Montenegro, Morocco, Palestine, Syria (suspended), Tunisia and Turkey).

⁴ Includes access to water and agriculture.

⁵ [La desertification dans l’espace mediterraneen, Centre international de Hautes Etudes Agronomiques Mediterraneennes](#)

⁶ Notably because of the increase use of air conditioning and new electrical appliances.

⁷ [ADEME, Mediterranean Energy Transition : 2040 Scenario, 2016: „Business As Usual Scenario” of OME which is based on current trend and the assumption](#) no significant change in people’s attitudes and priorities, or no major changes in technology, economics, or policies, would be taken.



2 Euro-Mediterranean region: the “Eldorado” of wind and sun

The region has tremendous assets that makes it able to tackle the challenge of energy transition. The first of them all is the existence of **good natural and geographical conditions** for the development of renewables energies: sun is highly present and the wind blows as one of the fastest in the world.

EU Northern Mediterranean countries have also started to benefit from the **assets of the region**. Portugal, with its combination of consequent wind and hydro deployment, has seen days where its whole electricity system was running on 100% renewable energy mix. Spain was an early renewable champion before stagnating, Italy and Greece are progressively catching up. Spain for instance, with an installed wind capacity of 23,031 MW (including 11 MW of wind and hydro capacity), providing 19% of the country's total electricity, is a champion for wind. Greece, with a total solar installed capacity of 2,6 MW⁸, was ranked 5th worldwide with regard to per capita installed photovoltaic capacity⁹.

Morocco has probably made the most impressive changes in the last years. During the COP 21, Morocco announced an objective of 52% of renewable share in its energy mix by 2030 (today the rate is 26%). In 2009, the country started building the **largest solar station** (Noor I) in the world (with a capacity of 580 MW) and at the end of 2014 it inaugurated the largest **wind farm** of Africa in *Tarfaya* with a capacity of 300 MW. Moreover, launched in 1996, the Global Rural Electrification Program (PERG) has enabled the electrification of 95% of the Moroccan territory. These projects show the potential of the region and the growing awareness towards climate change. Despite subsidies for fossil fuels remaining in place in Morocco, Egypt and Jordan, green power is competitive in these countries - 30 to 50 €/MWh in average.

Some other countries have also taken the best of it, such as Jordan which completed a **wind farm project** (*Tafila Wind Farm*) with a capacity of 117 MW. Morocco is also in the forefront of renewable energies (29th most attractive country for renewables in the world¹⁰).

The region has also some of the **world's forerunners in solar warm water heating**. Cyprus, Tunisia, Israel and Greece rank in the world top ten of deployment and have relevant domestic manufacturing capacities in this field. Tunisia has for decades paid a high political attention to **energy efficiency**. Already in the 1980 it set up a dedicated energy agency which designed energy efficiency initiatives for all sectors: appliances, housing, industry, transport. This policy was backed at the highest political level with the intention to build up an energy efficient economy.

These projects show **the potential of the region and the growing awareness towards climate change**. Despite subsidies for fossil fuels remaining in place, green power is competitive, which is a positive point for its future development. The combination of falling costs for solar and wind, the low interest rates, low oil price and the willingness at EU level to have a more holistic approach to combat the basic causes of population displacements make the actual moment a real **window of opportunity**.

⁸ World Energy Council figure.

⁹ Promoting Sustainable Practices through Energy Engineering and Asset Management, 2015.

¹⁰ According to the new barometer edition on renewable energies «Renewable Energy Country Attractiveness Index» established by Ernst&Young in 2014.

3 Solutions for a sustainable and interconnected future in the region

A Energy efficiency first

The European Commission declared¹¹: “Energy efficiency has a fundamental role to play in the transition toward a more competitive, secure and sustainable energy system”. It means the Commission has understood at highest political level that energy efficiency is our first fuel and triggers multiple benefits for climate, air pollution, jobs, economic competitiveness, energy poverty and reduced dependency on oil and gas. For the Southern Mediterranean countries, with their growing young population, energy efficiency is even more a necessity and a priority.

- **Efficient mass consumer products by Eco design and labelling**

Amongst the various policy elements to be deployed, **eco-design and energy labelling** are fundamental. It is particularly true when it comes to regulating the performance of cooling devices, an important sector in the Mediterranean region. At this stage, only Tunisia can claim big progress in this field but existing measures in the European Union on eco-design and labelling enables energy savings equivalent to the primary annual energy consumption of Italy by 2020¹²! Like in Tunisia, this pathway must be followed in the Southern Mediterranean region.

Having a **well-financed institutional capacity building initiative** bringing the benefits and experience of more than two decades of successful eco-design and labelling policies from EU to the non-EU Member States is probably the most important and urgent single policy to implement.

- **Affordable new near zero energy buildings and urban areas for hot climates**

Whereas in the EU the challenge is to renovate the existing building stock, Southern Mediterranean countries' challenge concerns the construction of affordable housing that growing young population need. Millions of new dwellings are necessary. If they are badly designed, they will be equipped with inefficient air conditioning systems and electricity demand increase will even more steeply. This is why the creation of a **well-financed and well-organised platform of supply chain around buildings** (architects, urbanists, insulation material providers, local craftsmen, financial institutions, real estate promoters etc.) is essential. This should be combined with a broader “green city” approach including **performant urban transport, bike lanes and reduce the usage of polluting mopeds and diesel cars** - often second hand coming from the EU.

As **tourism** is for most of the Euromed countries an important economic sector, **tourism buildings** (hotels, restaurants and other large commercial outlets) have a huge potential for reducing energy bills and the introduction and wider use of energy-saving measures. Malta has a positive experience and policy¹³ regarding these efforts, as it has undertaken the implementation of Energy Saving Systems¹⁴ under a scheme of a public-private partnership. Spain is also planning a major initiative in that respect.

Energy efficiency must also be thought in industrial processes and SMEs, as well as in transport notably cars, vans and lorries as they represent major drivers for change.

For all these changes, a **strong expertise** is needed. As an experienced country in this policy area, Tunisia introduced an idea of setting up a regional energy efficiency centre. This idea should be seriously considered.

¹¹ Communication from the European Commission to the European Parliament and the Council, 23.7.2014.

¹² European Commission, ecodesign and ecolabelling.

¹³ Energy Efficiency project launched aiming at placing Malta Hotels at the forefront within the Mediterranean Region, Malta Winds, 2017.

¹⁴ Such as Intelligent Lighting Control Systems, Energy Saving Control Systems for Air Conditioning, Refrigeration, Chillers and Boilers, Energy Management Systems or even Automatic Power Factor Correction Systems.



B Renewable energy sources

It is necessary to **change the energy trajectory of Mediterranean countries by favouring the deployment of renewable energy**. Beyond environmental benefits, **decentralised infrastructure** are needed in order to reduce the energy bill while the energy security in the region¹⁵ is strengthened.

These changes, require **significant investment in the electricity** sector to meet the resulting increase in electricity demand. Renewable energies are now cheap energy sources¹⁶ and should be used in this countries.

For these changes to be settled, capital costs is key:

Financing

- ➔ Large-scale projects could be funded by a combination of private and public funds to stimulate economic activity in the sector of renewable energies. Use should be made of the new Juncker initiative to establish an EU External Investment Plan.
- ➔ The European Union and the Union for Mediterranean should deeply coordinate their financing programs, their technical, regulatory and administrative assistance, in order to assist all countries and to gain rationality.
- ➔ Public support is needed in order to create derisking for investors to boost renewable technologies. As capital access is often an obstacle to reach projects, conditions must be settled to overcome it.
- ➔ The successful policies of the European Union and of the World Bank in Morocco concerning capital cost should be spread quickly to other Southern Mediterranean countries.
- ➔ The European Investment Bank should reinforce its actions for the development of renewables in the Mediterranean region. The European Investment Bank could also increase its ceiling for the loans targeted to the Mediterranean countries which undertake renewable projects.

An ambitious policy of **technological transfers** would help the Mediterranean region to be reach the possibility to build its own energy equipment in solar and wind. The introduction of a small share of local content requirement elements in public tenders of Southern Mediterranean countries could be an interesting option. The development of local industrial capacities, local technologies and knowledge must be ensured to avoid the aggravation of the inequalities between the Northern and the Southern part of the Mediterranean region. If big projects are of course necessary, **self-consumption** is also an important perspective for the future of energy in the region.

Inside Mediterranean countries, **flexibility** should be encouraged. Thereby, **demand-side response**¹⁷ for consumers is a good way to grant flexibility, as well as **energy storage** (notably batteries or other forms of storage). It enables energy efficiency and optimisation as this energy can then be used at a time when it is needed.

For the deployment of renewable energy sources, robust institutional capacities are essential, as well as robust policy design to give investors confidence to invest. Well-functioning wholesale markets can help to coordinate between countries and integrate RES better.

Beside, **reduce fossil subsidies** will further reinforce the competitiveness of RES. Introducing a carbon price (without going through the complexity and volatility of EU ETS) will generate revenues for the governments to tackle energy poverty while making the richer parts of society pay for its pollution.



¹⁵ MEDENER, the association of national agencies for energy efficiency and renewable energy, and OME, the Observatory for Mediterranean Energy, have defined and developed a voluntarist energy scenario, *the Mediterranean Energy Transition Scenario to 2040*; based on the prospective methodologies of ADEME (Agence de Maitrise de l'Environnement) and OME. The Energy Transition Scenario assumes the implementation of those measures that are currently the most technically, economically, and politically mature for large-scale rollout of energy efficiency and renewable energies. Compared to the business-as-usual scenario, the transition scenario would lead to a sizeable reduction in primary energy demand (-30%) and finale energy consumption (-23%), a substantial increase of the share of renewables in the energy mix, mainly solar and wind (27% in 2040), and a decrease in GHG emissions of 38%.

¹⁶ [In 2016, it was the case in 30 countries as shown by the World Economic Forum.](#)

¹⁷ The fact that consumers (the 'demand-side') can sign up to special tariffs and schemes which reward them for changing how and when they use electricity (known as 'demand-side response'). Smart meters and other technologies will make this easier than ever for domestic consumers.



4 Interconnectivity for common benefits

Major investments in renewables technologies must be made: as long as it is possible, deployment of internal capacity must be prioritized over costly interconnection. However, **building the infrastructures** that can make them communicate is essential. For the whole region to be sustainable and safe from scarcity, **interconnections** should be created in the region itself but within Europe too. Southern Mediterranean countries must not only improve their electricity generation but also their **transmission capacity**. The grid reinforcement in the countries is a priority. Portugal and Spain have world class grid operators in integrating RES. Their expertise should be spread to other countries.

This infrastructure should be combined with digital technologies. We should not create a digital gap between the two shores of the Mediterranean. Therefore renewable energy sources and energy efficiency policies goes along with the roll-out of broadband and 5G. Help to Southern Mediterranean countries should be provided to leapfrog as some of them did on telephone - over to mobile directly. To this regard, the initiative of Jean Louis Borloo for the electrification of Africa is a strong and positive initiative to empower young Africans generations.

A Tunisia - Italy cable, would be useful to sell electricity from North to South as Tunisia is struggling to get enough energy resources **in order to meet customer demand and reliability standards**. It can increase energy security and positively affect Malta as it will ease internal Italian north-south flows. This cable, still under evaluation¹⁸, should **go together with** green energy domestic efforts in Tunisia.

Electricity grids, must be developed in the same manner as electricity is the energy of the future. An interconnection exists between Morocco and Spain but the *Mediterranean electricity ring*¹⁹ has to be finished²⁰.

The cable reinforcement in the region must benefit green electricity rather than coal, preventing European market players to “outsource” their polluting coal-based electricity production to Northern Africa, hereby avoiding the EU ETS.

This is why a **collaborative approach** is needed. For instance, regarding the Spain-Morocco cable, Spain exports today to Morocco and helps stabilise Moroccan grid. But tomorrow this flow could be reversed, for example when there is more wind blowing in Morocco and smaller local demand. Same goes between Tunisia and Italy when the cable is completed.

The construction of the infrastructure required must **follow a common development goal of sustainability for the entire region**. Otherwise infrastructure will continue to grow in an unstructured manner in the region. To these regards, the project of an **Urban Agency for the Mediterranean**²¹ or the **Agency for sustainable Mediterranean cities and territories**²² which goal is to establish a mechanism of exchange of experience, expertise, cooperation and training, allowing to promote integrated and exemplary initiatives of urban and territorial development in the countries of the Union for the Mediterranean, are positive initiatives. If their area of action are clarified in the future, placing them under the framework of the UfM would be necessary to assure a global coherence. Government officials, energy agencies staff, architects, building material providers, trade unions, investors, bankers, grid operators, NGOs and academics should work together to follow a common path.

Education and environmental awareness on the two shores of the Mediterranean should be developed in order to increase social endorsement of the need to fight climate change and increase support to technologies and renewables energies. New **educational programs** could be established in order to produce a new generation of specialists, entrepreneurs and political decision-makers. Local jobs and growth could be fostered along the way of environmental benefits.



¹⁸ [The concept of a submarine transmission link between Tunisia and Italy was conceived several years ago. This link, which initially will have a capacity of 600 MW, would allow Tunisia to diversify its sources of energy imports, as well as it would represent a way to export green power from Tunisia to Italy.](#)

¹⁹ [The Mediterranean Electric Ring \(MedRing\) seeks to interconnect the Euro-Med electric power transmission grids of 22 countries around the Mediterranean basin. It involves linking electric power grids from Spain to Morocco, through the whole of North Africa, and onwards towards the Levant and Turkey. From Turkey, the ring would then link back into the European grid via Greece.](#)

²⁰ [Studies from the Comité maghrébin de l'électricité \(Comelec\) show that the building of such pipelines could create massive price reductions.](#)

²¹ [Creation of the urban Agency for the Mediterranean, Paris, October 15th 2010.](#)

Identify, develop, monitor and evaluate sustainable innovative urban projects.

The Urban agency for the Mediterranean (UafM), has the following tasks:

- allow the development of model projects for sustainable urban development, and contribute to the definition of projects ;
- set up technical assistance for project preparation, against remuneration ;
- mobilize financial and technical expertise to develop sustainable urban development projects, also from a financial point of view ;
- networking all the experts, agencies and institutions dealing with urban issues, regional planning, the built environment and urban heritage of the countries of the Union for the Mediterranean ;
- implement a management of jobs and skills ;
- Train middle managers to sustainable built (new and rehabilitation) and on Mediterranean sustainable urbanism.

²² [Agency for Sustainable Mediterranean Cities and Territories website.](#)



5 A sound governance to streamline initiatives

In order to avoid these projects to be beneficial only to certain countries (mainly Northern ones), a **multi-level governance** must be set in order to guarantee the participation of all stakeholders: cities, regions, communities, local government etc. Countries should verify the effectiveness of this principle in the ground by promoting **decentralised cooperation**. Ad hoc consultation platforms could therefore be created, grouping central governments, regional and territorial authorities, universities and so on in order to promote the involvement of all stakeholders.

Besides, **citizen dialogue and democratic involvement** should be encouraged and promoted through their implication on projects and their decision. Young people can act as driving force for sustainable development. That is why the creation of the Mediterranean Youth Climate Network with the support of the UfM as a place to share ideas and implement tangible action, putting the Mediterranean region at the forefront of positive actors for sustainable development is a great achievement²³.

Regional cooperation²⁴ must be a priority as it has shown its effectiveness in energy efficiency fields. The High Representative of the union for foreign affairs and security policy Federica Mogherini and Fathallah Sijilmassi, Secretary General of the UfM jointly recalled in a Declaration in November 18th 2015 the **strategic objective** regional cooperation represents for the European Union: "As the serious challenges in the Mediterranean are all of regional dimension, regional cooperation is more important than ever"²⁵.

Moreover, **dialogue and cooperation of these institutions** must be reinforced in order to avoid duplication and unnecessary red tape. Existing structures such as the **Union for Mediterranean (UfM)**²⁶ supported by the European Commission, which seeks to foster cooperation and dialogue in the region through the creation of platforms (for electricity, gas and renewables²⁷) or the **Parliamentary Assembly of the Mediterranean (PAM)**, a regional organization forum where the Parliaments of the region come together and operate to reach common objectives, are organization which should dialogue and better coordinate their action. To this regard, the **Smart Island Initiative** also goes in a right direction as it uses smart solutions to improve life on islands and to support the region's transition to a sustainable energy system.

Sectorial organisations such as **MedReg**, the Association of Mediterranean Energy Regulators or **MEDTSO**, the association of Mediterranean electricity TSOs, are positive examples of initiatives aimed at creating multilateral platforms of cooperation in the region and promoting a favourable framework for investments in the energy sector.

²³ As recalled by its young representative for the Mediterranean Youth Climate Network, [Imene Bouchair](#).

²⁴ [In Barcelona, 23 January 2017, Under the EU and Jordan UfM Co-presidency, the UfM Member States gave a strong political commitment today to strengthen regional cooperation in the Mediterranean.](#)

[A high level Meeting also took place in Algeria on April 11th 2017 to reinforce regional cooperation.](#)

²⁵ [Declaration on enhanced regional cooperation, Barcelona, November 18th 2015.](#)

²⁶ An intergovernmental organization bringing together the **28 European Union Member States and 15 Southern Mediterranean, African and Middle Eastern countries** (Albania, Algeria, Bosnia and Herzegovina, Egypt, Israel, Jordan, Lebanon, Mauritania, Monaco, Montenegro, Morocco, Palestine, Syria (suspended), Tunisia and Turkey).

²⁷ The European Commission is trying to promote market reform, mostly under the framework of the UfM chaired by two presidencies from North and South. Three thematic platforms exist:

1) Gas: all countries except Egypt and Algeria are importing their energy. There is a big economic problem here (for instance in Jordan, a huge GDP amount is at stake) and a big reliance on diesel and oil. Hence, converting to gas would be a positive step forward in terms of environment and energy security.

2) Regional electricity market (REM) platform: as most companies are vertically integrated, they do not operate based on cost efficient development. The European Investment Bank is involved via blending but not much coming up since private investment is lacking because of the very little regulatory certainty.

3) Renewable Energy System and Energy Efficiency to promote green investment and build local industry for solar, wind, and electronics. There is a need here to develop building codes, roll out of smart meters and phasing out to make it real.

6 Key recommendations

- Elaborate a **roadmap for the deployment of renewable energy sources** (solar and wind) in the Mediterranean region.
- Settle **concrete measures fostering energy efficiency** in the region: energy labelling, eco-design via the implementation of minimum energy performance standards on products etc.
- **Develop a master plan for interconnections** within the Southern Mediterranean region itself and with Europe too. Mediterranean countries should improve their electricity cross-border **transmission** capacity alongside the development of generation capacity
- Prepare a framework allowing for **technological transfers** for the benefit of Southern Mediterranean region who should be able to manufacture part of its own energy equipment in solar and wind.
- **Develop education and environmental awareness** programmes on the two shores of the Mediterranean in order to spread the awareness about climate change and knowledge on technologies and renewables energies.
- Establish a **multi-level governance** in order to avoid these projects to be beneficial only to certain countries (mainly Northern ones), and to guarantee the active and effective participation of all stakeholders to the energy transition.
- Ensure **access to capital** for financing renewable energy and interconnection projects throughout a **combination of private and public funds** following a de-risking strategy where public guarantees are mobilised to lower the cost of capital (logic of the Juncker Plan). The intervention of the European Investment Bank could be necessary.



²⁸ The EU could propose cooperation with Southern Mediterranean countries indicating via an A to G scale which products and appliances are consuming less energy.

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This Manifesto is endorsed by above-mentioned MEPs on an individual basis and does not necessarily reflect the views of all political groups.