The *EU Grids Package* and Beyond

PLANNING FOR AN INDEPENDENT, RESILIENT AND ELECTRIFIED EUROPEAN ENERGY FUTURE

Chiara Celesia, Rheanna Johnston, Artur Patuleia

As Europe once more finds itself rocked by an energy crisis, it has become a strategic imperative to accelerate the delivery of electricity grids that can support a shift away from volatile fossil fuels towards secure, homegrown renewable energy. To facilitate this transition, Europe needs a more coordinated, resilient and forward-looking approach to planning and delivering grids that will meet the needs of an evolving energy system. The EU and Member States have a critical opportunity in 2026 to lead with ambition on the grids agenda, most notably through the European Grids Package. Now is the moment to set a coherent framework and a shared vision that can unlock delivery of a future-proof, secure and competitive energy system.

Europe's continued exposure to the volatility and vulnerability of global fossil fuel markets underscores the importance of investing in a clean energy future. Electrification will be the backbone of a cost-effective, clean and resilient energy system. Strengthening Europe's grid infrastructure will therefore be critical to deliver on this transformation.

To ensure that Europe develops the necessary electricity grids in a timely and affordable manner will require decisive action by, and coordination between, both EU and Member State policymakers. Action by Member States, as well as current EU legislation offers opportunities to address these challenges, most notably the European Grids Package.[1] This briefing sets out three areas for action where the EU and Member States must deliver ambition in 2026 to quickly deliver a resilient and competitive electrification of Europe's economy.

[1] European Commission, December 2025, **European Grids Package (COM/2025/1005)**

Three priorities for the EU and Member States to deliver on the grids agenda

Set a common vision for Europe's grids

Strengthen coordination and planning by setting out a vision with a clear direction to guide planning and investment decisions, ensuring the right infrastructure is built in the right places. A European Grids Package centred around a transparent, accessible and forward-looking Central Scenario[2] would be a key step forward.

Strengthen national and regional planning frameworks to speed delivery

Ground planning in independent advice that reflects the challenges of a changing energy system and is supported by robust regulatory oversight. A move towards national-level independent system operators and planners (ISOPs) would support better, more cost-effective decision-making. Clear, climate-aligned regulatory mandates and streamlined regional governance would further accelerate delivery.

Put energy system resilience at the core of Europe's security

Embed a security-by-design approach and strengthen EU-wide coordination on security standards to meet the needs of a highly electrified, renewables-based and digital energy system. This includes alignment on operational standards, grid rules and key grid components as well as recognising the role of interconnectors as critical components of system resilience.

European energy planning: Current challenges and opportunities

Delivery of the electricity grids needed for Europe's clean transition remains constrained by fragmented governance, inconsistent planning assumptions, weak coordination across borders and insufficient investment visibility. The absence of a coherent vision of what the future system should look like across Europe limits the ability to unlock the full benefits of integration, including lower system costs, greater energy security and more affordable energy prices for households and industry.

The current system was designed to respond incrementally to predictable changes. However, this approach is no longer fit for purpose in the context of rapid electrification uptake, large-scale renewables deployment and new and evolving security risks.

Current EU legislation offers opportunities to address these challenges, most notably the European Grids Package. The legislative proposal published in December 2025 set out

[2] Art. 11 of the **TEN-E proposal for a regulation on guidelines for trans-European energy infrastructure**

revisions to the permitting framework (the Renewable Energy Directive and Electricity Market Directive) as well as to the TEN-E regulation (Trans-European Networks for Energy), which governs the planning of cross-border infrastructure. The Grid Package also includes new guidance on strategically addressing grid connection queues to support Member State implementation.

The legislative process for the Grids Package, which is currently ongoing, is supplemented by anticipated European Commission proposals on electrification and energy security in 2026. Together, this legislative agenda presents a critical moment for the EU to lead with ambition. Getting the framework and its implementation right, will determine whether grids remain a bottleneck, or become the enabler of the EU's energy transition.

Priority 1 - Setting a common vision for Europe's grids: The European Grids Package

This section sets out the benefits of the new TEN-E proposal for a European Central Scenario in the Grids Package. It is followed by an assessment of the core principles to guide the Package negotiations and ensure it delivers on the benefits of better governance, transparency and independence, alignment across EU policy, accounting for demand pathways and making the most of existing grids. Specific recommendations on how these principles can be operationalised are set out in the Annex to this briefing (summarised in Table 1).

Figure 1: The core benefits and strategic potential of a well-implemented Central Scenario within the European Grids Package, highlighting its impact on decarbonisation, competitiveness, and system resilience.

Table 1: Summary of recommendations on strengthening ambition of the European Grids Package Proposal; more detail is provided in the Annex

Principles	Recommendation
Implementing the Central Scenario	Adopt open-source modelling and approaches to ensure transparency and build stakeholder trust
	Define explicit objectives aligned with targets including 2050 climate neutrality, system resilience and affordability
	Integrate non-wire and clean flexibility solutions, as core elements of planning
Strengthening transparency and independence	Establish the EU Energy Data Hub to streamline and regulate data sharing across Member States and policy frameworks
	Formalise and expand the scope of stakeholder involvement
	Separate the ENTSOs[3] dual role to decouple legally mandated functions from their interest representation role
Targets and methodologies	Embed and operationalise the interconnection and cross-border capacity targets
	Align methodologies with electrification pathways, ensuring consistent KPIs for efficiency and industrial development

[3] European Network of Transmission System Operators for Electricity (ENTSO-E), the European Network of Transmission System Operators for Gas (ENTSOG) and the European Network of Network Operators for Hydrogen (ENNOH)

Unlocking the value of EU-level coordination

The European Grids Package proposal, published by the European Commission in December 2025, recognises the limits of fragmented decision-making and introduces a new European Central Scenario[4] to set out a common vision across energy vectors and to address cross-border infrastructure gaps via a new *Needs matching process*.[5] This proposal in the Grids Package seeks a shift away from the currently disjointed and project-oriented approach to building the EU's cross-border infrastructure, and instead presents an opportunity for a more forward-looking coordination at EU level. A common European vision, set out independently and transparently, can unlock the benefits of the energy transition[6] – enabling optimisation of Europe's renewable resources, reducing system costs by over €560 billion between 2030 and 2050,[7] supporting anticipatory investment decisions and contributing to timely infrastructure delivery.

To deliver this impact, the Grid Package's TEN-E proposal must set out a process for cross-border energy infrastructure planning that:

- Is aligned with targets and assumptions across different national and European assessments and planning frameworks and reflects Member State realities.
- Acts as a strategic framework to identify cross-border infrastructure needs for EU policy delivery.
- Is informed by stakeholders across sectors and based on transparent assumptions that build buy-in and enable timely delivery.

The following principles should guide the negotiations of the European Grids Package over the coming months.

Transparency and independence for more robust decision-making

The Grids Package Central Scenario envisions a shift of the scenario-building process from transmission system operators (TSOs) to the European Commission. This shift empowers a public institution, rather than asset owners, to set a common vision for European energy infrastructure. This better enables a prioritisation of public benefit and can be underpinned by a democratic process.

[4] Art. 11 of the proposal for a regulation of the European Parliament and of the Council on guidelines for trans-European energy infrastructure, amending Regulations (EU) 2019/942, (EU) 2019/943 and (EU) 2024/1789 and repealing Regulation (EU) 2022/869 (TEN-E proposal)

[5] Art. 13 of the TEN-E proposal

[6] See E3G, 2025, **Capturing the benefits of the EU's electrification | Better governance for delivering the grids agenda**

[7] Agora Energiewende, Forum Energii, IDDRI, EPG and ECCO, 2025, **Designing energy infrastructure for a climate-neutral Europe. Solutions for cost-effective system development.**

The governance of the scenario-building process must strike a careful balance: while Member States retain ownership of their energy pathways, independent technical expertise and EU-level coordination are essential to ensure robust analysis, to support national decision-making and identify the benefits of stronger coordination across borders.

Credibility and trust and therefore buy-in for the scenario – from decision makers, as well as involved and represented stakeholders – will depend on a high level of transparency. Transparent processes are essential to build trust, strengthen accountability, improve the quality of decision making and provide greater certainty for investors, policymakers and system operators.[8]

Proven approaches to deliver increased transparency include open-source modelling.[9] A third of European TSOs (31%) have already adopted open-source models to underpin their planning at national level;[10] increasing evidence from open modelling projects are emerging at European level.[11] A recent example of collaboration and innovation in the operation of Europe's electricity grid includes the ToOp open-source project by the German TSO 50Hertz and the Elia Group.[12] Together, these initiatives demonstrate growing momentum for greater openness and cooperation in Europe's grid-planning and operations, showing that the benefits of adopting more transparent approaches are within reach.

At the same time, security concerns are a reality in today's energy system, and the governance of the planning process must define the trade-offs between transparency, commercial sensitivity and infrastructure protection. While data on system needs and planning assumptions can create significant public value and improve coordination, sensitive operational information or detailed specifications should remain protected.

A robust common framework for data governance – the rules for how data is managed, secured and its quality assured – can support a transparent yet secure planning process; it will ensure that data remains consistent, aligned and up to date, while providing the necessary level of data aggregation and safeguards.

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[8] Brown, 2026, **Open grid data has a huge public benefit**

[9] Abdel-Khalek et al., 2025, **Free the models: How open energy system modelling unlocks the energy transition**

[10] Beyond Fossil Fuels (BFF), Ember, E3G & the Institute for Energy Economics and Financial Analysis (IEEFA), 2025, **How Europe's grid operators are preparing for the energy transition**

[11] See Open-source energy system model for the ENTSO-E Ten-Year Network Development Plan (TYNDP) built by Open Energy Transition, **https://open-tyndp.openenergytransition.org/**, using PyPSA-Eur and benchmarked against TYNDP 2024 reference data;
and Agora Energiewende, November 2025, **Designing energy infrastructure for a climate-neutral Europe**

[12] Elia Group ToOp (Topology Optimizer), **https://eliagroup.github.io/ToOp**, v.0.6.0

Grid planning aligned with EU targets and trajectories

Delivering an efficient and future-proof European grid requires stronger alignment between grid-planning processes and the broader EU energy policy framework.

The current lack of harmonisation across EU planning and modelling exercises, including major differences in core assumptions such as projected 2030 electricity demand, undermines the credibility and consistency of planning processes.[13] As a result, there remains uncertainty around future system needs, which discourages investment required for the energy transition.

Instead, a European approach to grid planning should:

- Align methodologies, assumptions, targets and indicators across EU energy policy and national planning processes.
- Ensure that infrastructure planning reflects common electrification pathways, industrial development and system-wide efficiency objectives.

Over time, this should evolve towards more integrated planning not only across electricity, gas and hydrogen systems, but also throughout the wider European energy framework, enabling a truly coherent system perspective.

Matching demand and making the most of existing grids

Electrification is expected to continue accelerating across Europe's energy-hungry industrial sectors and presents a key lever for enabling a cost-effective pathway to industrial decarbonisation and long-term competitiveness. Its success will depend not only on the availability of clean power, but also on timely and reliable access to grid capacity.[14]

In this context, grid planning will need to better reflect the growing role of demand in shaping future infrastructure needs. A more forward-looking approach to demand forecasting and spatial planning is increasingly important, ensuring that infrastructure development reflects evolving industrial demand patterns, regional development priorities and the wider electrification trajectory across Europe.

Such an approach can also strengthen investment signals and improve overall system resilience. Greater visibility over future demand trends, available capacity and regional bottlenecks would support more informed investment decisions across both industry and infrastructure sectors, helping reduce uncertainty and enabling a more coordinated and cost-effective pathway for electrification and grid development across Europe.

At the same time, a future-fit planning framework should move beyond a purely infrastructure-led approach and must be complemented by making the most of existing

[13] Bruegel, February 2026, **Better coordination for a more efficient European energy system**

[14] See E3G, March 2026, **Industrial electrification in the EU – Blocked by the grid?**

infrastructure. The transition to a highly electrified and renewables-based system increases the strategic importance of clean flexibility and other non-wire solutions as core components of system planning and operation.

The Grids Package must recognise and maximise the value of demand-side flexibility and other innovative solutions for improving system efficiency and reducing costs. Deploying storage, demand response, onsite renewables, microgrids and flexible industrial loads can help optimise the use of existing infrastructure and reduce congestion pressures, meet rising consumer demand and support renewable energy integration. Scaling up such resources could potentially save European consumers €300 billion per year on lower energy bills.[15]

These solutions should be systematically incorporated into the Central Scenario, ensuring that non-wire and clean flexibility solutions are embedded into infrastructure planning.

Priority 2 - National and regional planning as enablers of a better EU-level framework

Strengthening coordination between EU-level tools, such as the Central Scenario, and wider national planning processes, notably the National Energy and Climate Plans (NECPs), is essential to ensure that grid development follows consistent trajectories and shared assumptions. It is on strong national and regional foundations that an effective European approach to grid planning will be built.

Stronger national planning to capture the benefits of electrification

Well-designed national planning and governance, with clear mandates and robust oversight, can provide reliable inputs that not only strengthen the overall European picture, but also deliver clear benefits for the competitiveness and affordability of national energy systems.[16] Planning at Member State level grounded in independent and integrated approaches, can ensure that system planning is driven by long-term system needs and that cost-effective, timely decisions regarding supply, demand and infrastructure are taken.

Establishing National Independent System Operators and Planners (ISOPs)

Separating the operation and planning of energy systems from the asset ownership can ensure that system planning and operation are guided by public-interest-driven objectives, such as long-term system needs and resilience, cost-effectiveness and climate targets.

ISOPs integrate expertise across a nation's entire energy system (electricity, gas, hydrogen and other networks) under an independent advisory body. Such a model can ensure

[15] Brattle and Acousmatic for Beyond Fossil Fuels, February 2026, **Clean Flexibility: Opportunities in Europe**

[16] See E3G, 2025, **Capturing the benefits of EU's electrification**

greater coordination on expected demand evolution across energy vectors and better reflect the interdependencies of the energy transition, with potential savings of €32 billion per year in system costs across Europe.[17]

Given their independence, ISOPs are able to provide trusted and free-of-bias expert advice to national policymakers and deliver reliable inputs into EU-level planning processes.[18]

Strengthening and harmonising regulatory mandates

National energy regulators should be empowered through clear, forward-looking mandates that are climate-aligned and harmonised across the EU. This can ensure system planning is overseen effectively and aligned with affordability objectives and climate commitments, including coherence with the targets and assumptions of parallel planning processes, such as NECPs.

Strengthened regulatory frameworks should enable consistent scrutiny of planning assumptions, methodologies and investment choices. Importantly, they need to enable the systematic integration of clean flexibility and non-wire solutions into planning processes. This will help ensure that planning is cost-effective overall, future-proof and in the public interest.

Harmonised mandates and increased coordination would promote greater consistency and comparability of national inputs into EU-level processes and reduce regulatory fragmentation.[19] As a result, confidence in both national and EU-level energy planning will increase, in turn enabling anticipatory-style investments through increased investors' confidence.

Regional planning and coordination: a lever to strengthen the national and European energy system

The regional dimension is critical to bridging national priorities with the shared European vision: it can help translate objectives and planning into outcomes. Examples such as the North Seas Energy Cooperation (NSEC) and Offshore TSO Cooperation (OTC) demonstrate how strong high-level political backing and shared objectives can enable innovative and coordinated solutions on the ground.[20]

The European Commission, Member States and existing regional bodies have a role to play in improving and harmonising activities. By coordinating timelines, investments and cross-border energy projects, regional fora can support supply chain readiness: if they can

[17] Fraunhofer IEG / Fraunhofer ISI / d-fine, November 2025, **Integrated Infrastructure Planning and 2050 Climate Neutrality: Deriving Future-Proof European Energy Infrastructures**

[18] For more on ISOPs see E3G, 2025, **Capturing the benefits of EU's electrification**

[19] BFF, Ember, E3G & IEEFA, 2025, **How Europe's grid operators are preparing for the energy transition**

[20] See E3G, 2025, **Empowering Europe: Delivering the security and economic benefits of North Seas wind**

provide long-term visibility on shared infrastructure needs, this will play a key role in accelerating implementation on the ground, helping industry scale up and deliver at pace.

Together, strong national frameworks and more structured regional cooperation can underpin – rather than conflict with – a more integrated, efficient and actionable European grid planning system.

Streamlining the regional dimension across EU energy policy

The European Commission, supported by Member States, should harmonise regional structures. The current landscape of regional coordination is fragmented. Inconsistent country groupings and participation across frameworks limits their ability to serve mutually reinforcing purposes and shared objectives. Notwithstanding their different purposes and thematic focuses – coherent, harmonised scope and participation across regional structures[21] would strengthen trust and information-sharing among Member States; this would improve alignment and ensure that different regional processes can effectively reinforce one another.

In addition, the Energy Union Task Force should serve as a key body to facilitate shared learning. Best practices from existing regional initiatives should be more effectively identified and shared. For example, lessons from North Seas cooperation could inform developments in the Baltic Region, while governance approaches from offshore coordination models could be replicated across EU planning.

Priority 3 - Putting energy system resilience at the core of Europe's security

The lessons from the 2025 Iberian blackout highlight that the transition to a highly electrified, renewables-based and digital power system requires a parallel evolution of grid planning, operational standards and infrastructure capabilities. After the blackout Spain's renewable energy deployment reached record highs,[22] proving key to shielding the country's wholesale electricity prices against the impacts of the latest energy crisis.[23] Spain and Portugal's efforts to strengthen resilience and accelerate renewable deployment laid the foundation for a virtuous cycle of enhanced energy security and lower electricity costs.

As Europe faces continued exposure to fossil fuel volatility and growing climate, cyber and geopolitical risks, the resilience of electricity grids has become an increasingly vital pillar of Europe's energy security. This must be reflected in the policy, regulatory and investment

[21] Including Regional groups, High Level groups, regional groupings in TYNDP, Regional Coordination Centres, ad hoc groupings, Electricity and Gas Coordination Groups, and others.

[22] Red Eléctrica, **Renewable installed capacity by technology/fuel source (MW)**

[23] Ember, **Latest energy shock reminds Europe of its risky gas reliance**

decisions that underpin EU energy planning. To embed a secure and resilient approach into European grid planning:

- **The Commission should revise the EU's Energy Security Framework based on an approach to system resilience aligned with a transition to an increasingly decarbonised, decentralised and digitalised energy system.** This revision should mark an evolution from a focus on security of supply to one that enhances security by delivering a future energy system prepared to respond to technical, physical, cyber and geopolitical risks. A resilient system requires the systematic integration of security requirements into the design and modernisation of networks, in line with a "security by design" approach, ensuring consistency with the evolving security context and informed by relevant risk assessments. Doing so will also enable the operation of increasingly decarbonised power systems and economy-wide electrification, reducing the EU's dependence on volatile fossil fuel imports.

- The EU Agency for the Cooperation of Energy Regulators (**ACER**), **ENTSO-E and the European Commission should set EU grid rules to ensure that planning processes systemically integrate updated security and resilience requirements** to improve operational readiness. This will be particularly critical as power systems become increasingly digital, renewables-based and decentralised. Rules should recognise the potential of interconnectors and decentralised sources - both generation and storage - for system stability and restoration. Additionally, they should redefine the role of interconnectors. Rather than viewed only as market assets, interconnectors should be recognised as critical security and system operation tools that can enhance energy system preparedness and reduce exposure to volatile fossil fuel imports. These new EU rules should also facilitate enhanced coordination between TSOs and distribution system operators (DSOs), including better observability by TSOs of the networks connected to the transmission level.

- **Member States should prioritise the national implementation of EU energy system rules**. The 2025 Iberian blackout has forcefully demonstrated the consequences of a lack of agility among Member States in aligning operational standards with EU regulations; this is true especially for the implementation of system stability and voltage-control capabilities. Member States should be encouraged by EU institutions to fully implement and align with EU rules and standards, to improve the resilience and reactive capabilities of energy systems across the Union.

- **Member States should strengthen EU-wide and regional coordination on system resilience and restoration.** As climate, cyber and geopolitical risks increasingly transcend national borders, Member States should coordinate security requirements for grid design, procurement and engineering to support a common "security-by-design" approach across Europe. Regional cooperation between TSOs, regulators and relevant industrial and security stakeholders should also be strengthened to improve

preparedness, emergency response, system restoration and repair capabilities following large-scale disruptions. Recent events, from Baltic Sea cable sabotage to storm-related disruptions in Portugal, demonstrate the importance of coordinated cross-border resilience planning and response mechanisms.

Annex: Detailed recommendations for strengthening the ambition of the European Grids Package TEN-E proposal

This annex sets out actionable recommendations to operationalise the core principles set out in Section 1 of this briefing, ensuring the European Grids Package unlocks the full value of EU-level coordination.

During negotiations of the European Grids Package, co-legislators should use these recommendations to embed higher ambition into the final text. Subsequent implementation should be driven by the European Commission and the Joint Research Centre (JRC).

Co-legislators should ensure the Central Scenario is developed as follows:

- **Modelling should rely on open-source modelling** and publicly available assumptions to ensure transparency. Open-source approaches are a proven tool to build trust and buy-in as well as strengthening collaboration and analytical insights. This can support aligning expectations and more strategic investment decisions.[24] For details on how this may be achieved, see the recommendation for a new EU Energy Data Hub below.
- **Clear objectives for the Central Scenario should be defined**, so that it is explicitly designed to support other key European objectives. This includes the EU's 2050 climate neutrality target, strengthening energy security and system resilience, and delivering affordability and competitiveness as core system principles (reflecting the approach adopted for NESO, the UK's ISOP, in the 2023 Energy Act).[25]
- **Fully incorporate innovative-wire and non-wire system services, as well as non-fossil flexible solutions** in the Central Scenario.

Further elements to strengthen European coordination and transparency in the TEN-E Proposal include:

- Setting up a new EU Energy Data Hub (the Hub).[26]
    - The Hub's objective would be to collect, standardise and share data and assumptions across different EU policy and planning frameworks as well as those of Member States. It would work across actors (including Commission, national ministries, ENTSOs and national TSOs) to coordinate and harmonise data collection processes. The Hub would serve as a single data repository, streamlining both data collection as

[24] Abdel-Khalek et al., 2025, **Free the models: How open energy system modelling unlocks the energy transition**

[25] UK Government, 2023, **Energy Act**

[26] Bruegel, February 2026, **Better coordination for a more efficient European energy system**

well as data access for decision-makers, academics, industry and civil society stakeholders. It could support development of the Central Scenario, as well as broader reporting across the EU energy policy framework, streamlining and reducing duplication of reporting processes while ensuring consistent and up-to-date information.

- The Hub would require clear governance and data-sharing requirements, with appropriate aggregation safeguards to balance openness with infrastructure security and commercial sensitivity. Common data standards and reporting requirements should ensure that inputs are consistent, reliable, up-to-date and fit for purpose across Member States.

- The TEN-E Regulation revision should be set up with stakeholder involvement clearly outlined and embedded in the process:

  - The role and participation of the existing Stakeholder Reference Group should be defined given that it plays an important role both in the scenario-building and throughout the entire TYNDP process.

  - The High-level and Regional Groups should also be strengthened to bridge the gap between national and EU-level processes and priorities, ensuring the necessary alignment and coordination (see Section 2).

  - The list of consulted stakeholders should be further expanded to also include EU DSO Entity, ESABCC, relevant associations, aggregators and demand-side industry; likewise, involving consumer organisations and civil society would strengthen the robustness of and wider buy-in to the scenario.

- **The TEN-E Regulation should explicitly embed and operationalise the interconnection and cross-border capacity targets** set by the 2014 European Council.[27] Enhanced cross-border electricity trade enabled by increased interconnectivity already delivered €34 billion in benefits in 2021. Yet almost 40% of Member States, including the EU's five largest economies, remain below minimum target thresholds for interconnections.[28] Explicitly embedding interconnection targets in planning can support delivery.

- **The methodologies and indicators in the Central Scenario, TYNDP and NECPs should reflect electrification pathways, industrial development and system-wide efficiency**. This requires aligning renewable energy and energy efficiency targets, as well as electrification targets (or KPIs) set by the EU energy architecture. A consistent application of targets and setting a coherent long-term direction for the European

[27] European Council, 2014, **EUCO 169/14, Conclusions**

[28] European Commission, 2026, **Electricity Interconnection Targets**

energy system will provide a coherent and predictable framework across the Energy Union, in turn strengthening long-term investment signals.

- **Strengthen independent expertise at EU level** by separating the ENTSOs' interest representation role from their mandated planning and technical functions. This would support mitigating potential conflicts of interest by separating commercial interest from vital planning and advisory functions, reinforcing trust, neutrality and transparency in system planning.

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