



Water

Challenges at Home, Opportunities Abroad

Water as a Multifaceted Priority for the EU

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Water is a matter of great importance for the European Union, as the new EU Commission has recognised. In order to address challenges such as ensuring the quality of water bodies and the sustainable management of water as a key resource, it will be necessary not only to pursue conservation, but also to balance a wide range of interests – and European Christian Democrats and Conservatives will have a prominent role to play in this connection. Meanwhile, in external EU relations, increased engagement in the field of water and maritime security could yield a geopolitical dividend.

The newly installed EU Commission commenced its work under President Ursula von der Leyen on 1 December 2024, with its political guidelines being dominated by the major themes of security, competitiveness, the implementation of the Green Deal, defence and Ukraine. However, there is a clear indication that water is likewise a cross-cutting theme of enormous relevance. Managing scarce water resources will be a crucial challenge for the EU in the years ahead, with this topic simultaneously presenting an opportunity for the EU to boost its status in the area of foreign policy.

Growing Pressure on Water Resources – Even in the EU

Access to clean drinking water and sanitation is a human right, as explicitly recognised by the United Nations General Assembly in 2010 through Resolution 64/292. The resolution calls on states and international organisations to promote capacity-building and technology transfer in order to support developing countries both in providing water for their populations and in establishing a resilient water infrastructure. The EU has already set out a range of ambitious goals in connection with the UN sustainability agenda, including improving access to drinking water and sanitation for 70 million people by 2050.¹

Global water demand is steadily increasing,² with half of the world's population experiencing water

scarcity for at least part of the year. In many regions, water is a scarce resource: Indeed, a total of 2.2 billion people lack access to clean drinking water.³ Compared with the severe water stress⁴ in other parts of the world, the situation in the EU is less critical because nearly 100 per cent of the population has access to clean drinking water, with water management being relatively robust. Nonetheless, some of the worrying global trends are also becoming increasingly evident in the EU, such as the loss of biodiversity in aquatic ecosystems.

Some EU countries and regions are already experiencing seasonal water shortages. According to the latest report issued by the European Environment Agency (EEA), around 20 per cent of EU territory and 30 per cent of its population are now affected by “water stress” – at least on a seasonal basis.⁵ Water pollution caused by chemicals, coal-based energy production and highly persistent per- and polyfluoroalkyl substances (PFAS) – which pose serious health risks – represent another major challenge for the EU. Nevertheless, 77 per cent of the EU's groundwater reserves remain in good chemical condition, with pollution primarily being caused by nitrates and pesticides. The greatest pollution pressure on both surface water and groundwater stems from agricultural use. All in all, the EEA report warns of increasing pressure on the water sector, with this pressure being driven in part by climate change. Moreover, projections indicate that the gap between water supply and demand

will continue to widen.⁶ Alarmingly, the report finds that the EU is not well prepared to tackle these challenges. The paper identifies three key problems: protecting and restoring aquatic ecosystems, achieving zero pollution, and adapting to water scarcity, droughts and potential flooding.

Effective cooperation between commissioners will be crucial.

Water scarcity and water stress are also becoming an increasing economic burden in the EU. The 2022 drought caused damage amounting to 40 billion euros, while the 2021 floods resulted in losses of 44 billion euros and severely affected not only Germany, but also Belgium and the Netherlands. The European Commission estimates that without efforts in the area of climate action or adaptation, these costs could increase sixfold by the end of the century.⁷ Droughts impact not only agriculture, but also waterborne transport: For example, low water levels on the Rhine in 2018 caused nearly five billion euros worth of damage. Flood-damaged infrastructure is also an escalating concern.⁸

Broad Consensus on Water as a Priority for the New European Commission

Against the backdrop of the increasingly deteriorating situation, European Commission President Ursula von der Leyen has not only highlighted the importance of water in her political guidelines, but also assigned it a key role in the portfolios of several commissioners:

- The new EU Commissioner for Fisheries and Oceans – Costas Kadić (independent) from Cyprus – has been tasked with launching a research and innovation strategy for oceans by 2030 in order to meet the goal set in 2021 of regenerating oceans and water.⁹
- Agriculture Commissioner Christophe Hansen (European People's Party, EPP) will also

address water-related issues in his portfolio because agriculture is the largest water consumer in the EU, accounting for 59 per cent of total use.¹⁰ The Luxembourgish politician served as rapporteur for the EU Drinking Water Directive during his time as an MEP.

- The main responsibility for water-related policies will lie with Swedish EU Commissioner Jessika Roswall (EPP).¹¹ She will be in charge of the European water resilience initiative, which aims to strengthen the water supply across the EU. This comprehensive strategy will address water efficiency, scarcity and pollution as well as water as a risk factor. At the same time, it seeks to enhance the competitiveness of Europe's water sector – including water supply and wastewater management – as well as digital water management and cross-border water infrastructure. Roswall is additionally tasked with strengthening the EU's global leadership on water, not least through the launch of Global Gateway projects in partner countries. What is more, the EU will continue to play an active role in the G7 Water Coalition, which aims to tackle the global water crisis by identifying common goals and strategies.

Given that water policy spans multiple portfolios, effective cooperation between commissioners will be crucial.

Essentially, there is a comparatively broad consensus within the EU and among member states on the importance of water and the urgency of addressing the issue at the European level. Originally proposed in 2000, the Water Framework Directive received strong support in the European Parliament at the time. Similarly, the European Commission's proposal to protect groundwater from pollution and to establish quality standards for water policy was widely endorsed by the four traditionally pro-European parliamentary groups: namely the EPP, S&D, Liberals and Greens. Additionally, the European Parliament has established an informal Water Group, which is chaired by German MEP Hildegard Bentele (CDU).¹² At the end of the previous EU legislative period, nearly

40 members of the European Parliament from various political groups – led by Danish MEP Pernille Weiss (EPP) – signed a letter calling for an “EU Blue Deal”, which is a comprehensive, cross-sectoral water strategy designed to complement the Green Deal. There is also strong consensus among member states that water should be made a priority for the EU in the coming years, as underscored by a letter signed by 21 EU member states that was sent to the European Commission on 17 July 2024.¹³

A directive identifies water as a key component of Europe’s heritage that must be preserved.

Fresh Momentum on a Long-standing Issue

The EU’s key instrument for ensuring water quality is the Water Framework Directive. Its

overarching objectives include protecting and improving the condition of aquatic ecosystems and groundwater, such as land ecosystems that depend directly on water, that promote the sustainable use of water resources, that reduce groundwater pollution and that address the impacts of floods and droughts. The main 15-year goal of the directive was to achieve good ecological and chemical status for surface waters as well as good ecological potential and chemical status for heavily modified or artificial water bodies. This deadline was later extended to 2020 and then to 2027. The directive identifies water as a key component of Europe’s heritage that must be preserved.¹⁴

Other instruments dedicated to the protection of water include the Nature Restoration Law, which was adopted in 2024, as well as the Biodiversity Strategy for 2030 and the Zero Pollution Action Plan. Additional measures include the Groundwater Directive and the Floods Directive. One significant step was the Drinking Water Directive



Focussing on water as a priority: EU Commission President Ursula von der Leyen speaks with Jessika Roswall (right), EU Commissioner for Environment, Water Resilience and a Competitive Circular Economy. Photo: © Wiktor Dabkowski, Zuma Press, Imago.

of 2019, which updated quality standards for drinking water; introduced stricter thresholds for certain pollutants, such as lead and bacteria; and set minimum hygiene requirements for materials that come in contact with water, such as those used for making pipes and taps.

When it comes to water, the EU is not dependent on geopolitically unreliable partners.

In 2025, ideally before the summer, the Commission plans to present the long-delayed Water Resilience Strategy, which aims to provide fresh momentum and to serve as a comprehensive cross-sectoral approach. All in all, the strategy is to focus on the following priorities¹⁵:

- maintaining high water quality both in the EU and globally,
- restoring the disrupted water cycle,
- strengthening the competitiveness of the water sector,
- creating an ambitious vision for a “water-resilient” society and
- fostering innovation.

The EU’s Strengths and Weaknesses in the Water Sector

In several respects, the EU continues to demonstrate notable strengths in water management. The water sector plays a significant role in the EU economy, contributing substantially to economic output. Commissioned by the European Council and authored by former Italian Prime Minister Enrico Letta, the Letta Report cites 107 billion euros in value creation and 1.7 million jobs across approximately 80,000 companies. What is more, no other region in the world has such a dense network of cooperation initiatives and a similarly robust legal framework as the EU. Cross-border water use is facilitated, and conflicts over this increasingly scarce resource are less acute than in many other parts of the world.

The EU is even a global leader in innovation in the area of water management, at least in terms of patents: According to figures published by the European Patent Office, between 1992 and 2021, around 32 per cent of water management patents originated from EU member states (when taking all member states of the European Patent Organisation – which also includes the UK – into account, the share rises to 40 per cent), with Germany alone accounting for 12 per cent. This puts the EU well ahead of the United States, Japan and China over the period in question.¹⁶ Unlike in the case of critical raw materials, the EU has its own water resources and is not dependent on geopolitically unreliable partners. The EU also has a dense network of navigable waterways that spans 25 member states and connects 13 of them – an even more extensive network than that of the United States.¹⁷

However, the EU also faces challenges. Despite being a global leader in water management innovation, gaps in innovation have widened in recent years. In order to address this gap, the EU’s Horizon Europe research framework programme has allocated 1.3 billion euros to research and innovation projects in the water sector. Experts and industry representatives have also criticised the slow implementation of innovations, which has been partly due to the regulatory environment: Compared with other regions or countries, it takes far too long for innovations to reach the market in the EU.

While networking in the EU may be more advanced than in other regions, the internal water market still requires significant development, with key areas being the standardisation of regulations, better cooperation between inland waterway ports across different EU countries and the harmonisation of labour standards in the water sector.¹⁸ There is still room for improvement when it comes to using waterways for transport, and a better water infrastructure network could also act as a driver of growth and help to relieve congested roads. In 2020, only six per cent of freight transport in the EU took place via waterways, with this figure representing a slight decline since 2015. The biggest shortcoming is

that as impressive as the EU's regulatory framework may be, the implementation of many directives remains inadequate. The EU is also falling well behind on the targets set by the Water Framework Directive: Indeed, only around 37 per cent of EU water bodies are classified as being in good or very good ecological condition. These figures have remained largely stagnant since 2010 and are still far from those that would meet the directive's requirements. In February 2025, the European Commission therefore announced that it would intensify the constructive dialogue with the member states in this regard, but would also maintain the infringement proceedings against defaulting member states.

Highly Diverse Expectations

There is broad consensus on water as a priority issue, on the overall resilience goals already envisaged by the Commission and on the importance of raising awareness about water-related issues, but there is less agreement with regard to the choice of measures. Many experts in Brussels believe that the water sector is lacking not primarily legislation, but rather the effective implementation of legislation. Accordingly, some members of parliament are sceptical about the need for entirely new legislation. However, there are strong calls for a revision of the Water Framework Directive. For instance, the Draghi Report – published in 2024 – also advocates targeted adjustment,¹⁹ citing the significant gap between the quality of EU water bodies and the targets set in the directive.

There are several reasons for this discrepancy. One is simply that water bodies take considerable time to recover. Another reason – according to the EU Environment Agency – is the slow implementation of the Water Framework Directive, which has been partly due to insufficient funding and to the inadequate integration of water-related aspects into other policy areas. Other voices – particularly in industry – are calling for a comprehensive revision of the directive in order to better align environmental and sustainability goals with the use of water in connection with economic activity. Representatives

of civil society, politics and industry are advocating greater water efficiency and are raising awareness both in society and in the economy about the notion that water is a finite resource. However, particularly in industry, there are also concerns that a water resilience initiative could result in lower priority being attached to industrial water use.

Several key elements continually resurface in the discussion. One such element is the strengthening of economic incentives through water pricing, also in the private sector, and another involves making greater use of lower-quality water for certain activities. High-quality drinking water is still being (over)used across the EU for purposes for which lower-quality water would suffice.

Water scarcity contributes to the destabilisation of EU neighbouring countries.

Another pressing issue – quite literally a work in progress – is the renewal and expansion of water infrastructure in the EU as well as the better adaptation of waterborne transport to times with low water levels, which are expected to occur more frequently in the future. The need for investment – particularly in the area of infrastructure – is substantial, which is why experts and the European Parliament²⁰ are pushing for such investment to be a key priority in the next EU Multiannual Financial Framework (MFF) for 2028 to 2035, for which negotiations are set to get underway in Brussels in mid-2025. The European economy is hoping not only for large-scale investments, but also for faster EU approval procedures similar to those in the renewable energy sector and for a reduction in bureaucratic hurdles in order to accelerate market access for innovations.

Demands often go in different – and not always compatible – directions. Public discussion frequently brings up the notion that sustainability and competitiveness in the water sector are not

contradictory. However, many issues should be expected to require difficult trade-offs, especially where not only consistent implementation, but also a significant tightening of regulations is called for. The EU-wide debate on banning PFAS is a prime example: While these substances contribute significantly to water pollution, they are indispensable for key technologies that are needed in the energy transition.

Water as a Key Aspect of EU External Relations

There is likely to be less controversy over the importance of water in the EU's external relations. In this area, the EU is able not only to help improve water management worldwide, but also to contribute to its own security. Indeed, a clear focus on water in EU foreign policy could even yield geopolitical benefits in the long run.

Water scarcity and unreliable access to water are key factors that can destabilise countries both in the EU's immediate neighbourhood and further afield, which in turn can lead to increasing migration pressure on the EU. Climate change has strengthened jihadist groups in several African regions, with the case of Somalia illustrating how terrorist groups such as Al-Shabaab deliberately exploit climate-induced resource scarcity in order to expand their influence and control at both local

and regional levels. These groups restrict access to humanitarian aid and strategically manipulate resource distribution in a manner that gains them local support.

Water management issues can serve as a platform for dialogue with difficult partners.

Experts emphasise that international players such as the EU can contribute to the resilience of fragile regions or states – and thus to the security of the EU as a whole – even by means of soft measures, such as supporting capacity-building at the local level, whether in the area of improved water management or better early warning systems. In addition, EU member states with significant expertise in water management – such as Denmark or Germany – can enter into bilateral partnerships in order to provide targeted climate adaptation funding. Other key priorities include strengthening regional cooperation – as seen in Central Asia – and continuing the intensified efforts in water diplomacy that have been undertaken in recent years. Water cooperation could also enable the EU to play a greater role in the Middle East, particularly in plans for the creation of a renewable

Experienced player in the field of maritime security: The EU's anti-piracy mission Atalanta was launched back in 2008. The picture shows a routine check by Swedish forces in May 2009. Photo: © Johan Lundahl, TT, Imago.



energy corridor between the EU and this region. A crucial factor for many countries in the region in developing this corridor is the fight against water scarcity. The EU could contribute by supporting better water management in some of the countries concerned through programmes such as Horizon Europe, thereby drawing on experience from Southern Europe.²¹

Under the Global Gateway Initiative, the EU can play a key role in development by strengthening water infrastructure in partner countries and by providing guidance on creating legal frameworks for water management. Several Global Gateway projects in Africa and Latin America already focus on water, though their financial scope remains relatively modest. These projects range from desalination projects – such as in Djibouti – to water purification measures and flood prevention initiatives.²²

Given the EU's strong expertise in water management, it has the potential to be at least as competitive in this field as other global powers, such as China and the US. Global Gateway also strongly emphasises private sector involvement. In light of Europe's well-developed water industry, a greater focus on water within the initiative could yield both political and economic benefits for the EU. At the same time, the EU will need to carefully assess its priorities in order to avoid overburdening itself. This challenge is illustrated by one of Global Gateway's flagship water initiatives: namely the Team Europe Initiative on Water, Energy and Climate Change in Central Asia, which has a budget of 700 million euros. The initiative's broad scope spans improving regional cooperation for sustainable development, supporting the controversial Rogun Dam megaproject and boosting investment in a regional energy transition. Given the EU's limited diplomatic and financial resources, it is doubtful whether it can fully meet all these objectives.

Water partnerships with third countries can be another useful instrument. The EU launched such a partnership with India in 2016, although this partnership has thus far focused mainly on

research projects. Water management issues can also serve as a platform for dialogue with difficult partners where common ground in other areas is shrinking. For instance, the EU has had a water cooperation agreement with China since 2006 that began with a river basin management project, while the EU-China Water Cooperation Platform was established in 2012 and was followed in 2017 by an EU-China dialogue on water diplomacy and by the EU-funded China-EU Water Platform, which includes an annual ministerial meeting.²³ Some observers also view water partnerships as confidence-building measures and potential gateways for cooperation with states where “normal” diplomatic relations are currently not possible or not desired. There are some in Brussels who view dialogue on water as a preliminary diplomatic channel for engagement between the EU and Afghanistan, for instance. The Taliban-led National Environmental Protection Agency has acknowledged the severe impacts of climate change on Afghanistan and has called for international assistance.

The nature of water policy aligns well with the core principles of conservatives and Christian Democrats.

At the multilateral level, the EU is still expected to take a leading role in the water sector, whether within the G7 or in various UN bodies. A sound awareness of the fact that water stress affects numerous countries in very different ways across continents is an important factor in terms of the EU's international credibility.

The European Union is also a key player in the field of maritime security and is expected to remain so in the new legislative period. In October 2023, the EU updated its maritime security strategy, which had originally been adopted in 2014.²⁴ This strategy sets out six main objectives: strengthening maritime operations, including annual exercises; increasing cooperation with

like-minded and strategic partners, particularly NATO; taking a leading role in maritime situational awareness; addressing risks and threats, such as the protection of critical infrastructure; enhancing capabilities; and improving training and education.

In practical terms, the EU is currently conducting several maritime military missions, including Operation Aspides, which was launched in February 2024 in order to safeguard the freedom of navigation in both the Red Sea and the Gulf of Aden. Operation Aspides has fewer operational powers than the equivalent US-led mission, however. It is closely coordinated with Operation Atalanta, the EU's anti-piracy mission, which has been in place since 2008 and involves around 600 personnel. Furthermore, the EU runs Operation Irini in the Mediterranean Sea in order to enforce the UN arms embargo on Libya. Given both security and trade interests, continued and potentially stronger EU engagement in maritime security is likely to be necessary in the future.

A Key Issue for European Christian Democrats

Ultimately, the European Christian Democrats and Conservatives of the European People's Party will bear a particular responsibility for water policy in the coming years for several reasons. Firstly, representatives of the EPP family hold key positions in the EU, including Commissioner Roswall, Agriculture Commissioner Hansen and Hildegard Bentele, who is the chair of the Water Group in the European Parliament. Secondly, the nature of this policy area aligns well with the core principles of conservatives and Christian Democrats. Conservation lies at the heart of conservatism, while political Christian Democracy is fundamentally about finding balance and making difficult tradeoffs between different goals.²⁵ In order to effectively achieve the goal of preserving water as a valuable resource in the long term, such a balance will be needed – not only between different objectives, but also between a wide range of policy instruments. Water protection and management require a broad understanding of

sustainability – one that goes beyond obvious ecological concerns to also include social, economic and financial aspects, thereby ensuring a fair balance between the interests of present and future generations.

Some examples include the importance of raising awareness about the careful use of scarce water resources as well as the need to ensure affordable access to water for everyone. A fresh initiative with the goal of improving water efficiency is valuable; however, it is just as crucial to ensure that all sectors and consumer groups face fair but not excessive burdens.

From a regulatory perspective, balancing objectives is not enough. Indeed, there must also be careful consideration of the instruments used. Do new regulations need to be introduced, or would revising existing ones and providing better support, incentives and pressure for their implementation be more effective? Equally, it will also be necessary to strike the right balance between urgently required infrastructure investments and more cost-effective measures for enhancing competitiveness and innovation. This includes facilitating faster market access, reducing bureaucracy, and supporting research, innovation and the water sector.

If the EU succeeds in striking this balance in the coming years, this will not only strengthen water resilience, but also contribute significantly to the EU's own competitiveness and to the security of its citizens.

– translated from German –

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