



Draft 2023/24 National Energy and Climate Plans: Greater ambition needed for cycling for a climate- neutral Europe



ECF gratefully acknowledges financial support from the LIFE Programme of the European Union



ECF gratefully acknowledges financial support from the cycling industry via Cycling Industries Europe

www.ecf.com

Publishing credits

Author

Fabian Küster, Director of Advocacy and EU Affairs, f.kuester@ecf.com

Editors

Anna-Karina Reibold, Communications and Media Relations Manager

Robyn Fleming, Communications Coordinator

Design

Omer Malak, Brand and Marketing Officer

© European Cyclists' Federation, May 2024

This report is also available online at www.ecf.com

Table of contents

Table of contents.....	2
Disclaimer	3
1. Executive summary	4
2. Overall EU climate and energy policy context.....	5
2.1 Context	5
2.2 Trends in GHG emissions	6
2.3 Calculating potential GHG savings from cycling	7
3. Assessing the role of cycling in the NECPs	7
3.1 Methodology: The 13 ECF indicators	7
3.2 Total score and EU countries' ranking	9
3.3 Highlights per indicator.....	10
3.4 How draft NECPs score against the 13 ECF Cycling Indicators	12
3.5 Cycling in NECPs: Climbers and Divers	13
4. Overall ECF assessment	16
5. Call to Action	16
References.....	17
Annex A: The role of cycling in the NECPs through 13 indicators per country	18

Disclaimer

ECF wants to stress that this report is strictly limited to evaluating how cycling is considered within the National Energy and Climate Plans (NECPs) and should not be understood as an assessment of how cycling policies are supported generally at national level by the Member States (and in fact any other level of governance). This paper also refrains from any judgement to what extent planned interventions announced in the draft NECPs are likely to be implemented in the years to come.

For a more general analysis of national cycling strategies please consult ECF's "The state of national cycling strategies in Europe (2023)" report that can be assessed here: https://ecf.com/system/files/The-State-of-National-Cycling-Strategies-2023_ECF.pdf

1. Executive summary

Across the board of the draft National Energy and Climate Plans, the potential for cycling in reducing GHG emissions in the transport sector is still not fully utilised. Against a total of 13 indicators, with a possible top score of 10 points, the average score of the 26 draft NECPs submitted by EU Member States to the European Commission in 223/24 was 4.63.

This is only an incremental increase against the final 2019 NECPs that achieved a score of 4.35/10.

However, big discrepancies exist between Member States. Whereas three countries submitted draft NECPs that scored 'excellent' for their cycling indicators (Belgium, France, Italy), a considerable number of countries paid very limited attention to cycling, including Bulgaria, Estonia, Finland, Latvia, Slovenia and Sweden. Latvia was the only country that failed to mention active mobility/ cycling even once. Belgium achieved the highest score (9).

While the overall result for cycling in the draft NECPs is a mixed bag, there is still time to add measures in the final NECPs that need to be submitted to the European Commission by the end of June 2024. Measures that could be included are the development and implementation of a national cycling strategy, dedicated budgets for cycling investments, and concrete actions to improve road safety.

For the EU to achieve climate neutrality by 2050, the transport sector needs to reduce GHG emissions by 90% compared to 1990. With no doubt, a large share of this emission reduction will have to come through the electrification of road and rail transport as well as cleaner fuels in aviation, inland waterways and maritime transport. Yet a considerable emission reduction gap will remain as long as a sizable part of road transport is not shifted to active mobility and public transport. Cycling can have a significant impact in reducing transport GHG emissions: for every average person who cycles one trip more a day and drives one trip less a day by car for 200 days a year, mobility-related lifecycle CO₂ emissions decrease by about 0.5 tonnes over a year.

To make a climate-neutral Europe by 2050 a reality, we need greater cycling ambition, as reflected by the first ever **“European Declaration on Cycling” (C/2024/2377)**. The Declaration, adopted by the European Council, Parliament and Commission on 3 April 2024, aims to serve as a “strategic compass for existing and future policies to “unleash the full potential of cycling in the European Union.”

The declaration states: *“Sustainable forms of transport are essential for achieving the EU’s climate, zero pollution and energy efficiency objectives. Among these, cycling is one of the most sustainable, healthy and efficient, with considerable potential to support the decarbonisation of urban transport and help achieve the EU-wide target of reducing net greenhouse gas emissions by at least 55 % by 2030 compared to 1990 and climate neutrality by 2050 in line with the European Climate Law .”*

ECF calls upon all Member States to include tangible cycling commitments and actions in their final NECP.

2. Overall EU climate and energy policy context

2.1 Context

Making Europe the first climate-neutral continent in the world mid-century is a legally binding commitment under the EU Climate Law. EU Member States have pledged to collectively reduce emissions by at least 55% by 2030, compared to 1990 levels. As a further step on the path towards climate neutrality, the Commission presented its assessment for a 2040 climate target for the EU in February 2024. It recommended to reduce net greenhouse gas emissions in the EU by 90% by 2040 compared to 1990 levels.

These targets go hand in hand with improving energy efficiency. A new binding EU-level target is established to improve energy efficiency by 11.7% by 2030. Member States will have to make annual savings of an average of 1.49% from 2024 to 2030.

The newly created **Social Climate Fund** will support EU citizens most affected or at risk of energy or mobility poverty. It will provide over €86 billion in total to support the most vulnerable citizens and small businesses with managing the green transition. Cycling is a potential beneficiary of forthcoming national social climate funds.

To meet the EU's energy and climate targets for 2030, EU countries need to establish a 10-year integrated National Energy and Climate Plan (NECP) for the period from 2021 to 2030. The national plans outline how the EU countries intend to address five areas: energy efficiency, renewables, greenhouse gas emissions reductions, interconnections, and research and innovation.

The NECPs were introduced by the [Regulation on the governance of the energy union and climate action](#) (EU)2018/1999, agreed as part of the [Clean energy for all Europeans package](#) which was adopted in 2019.

By 30 June 2023, Member States were due to submit their draft updated NECPs. Austria is the only country that has yet to submit its draft NECP to the European Commission.¹ Final NECPs will need to be submitted by 30 June 2024.

¹ Accessed: 3 May 2024. https://commission.europa.eu/energy-climate-change-environment/implementation-eu-countries/energy-and-climate-governance-and-reporting/national-energy-and-climate-plans_en

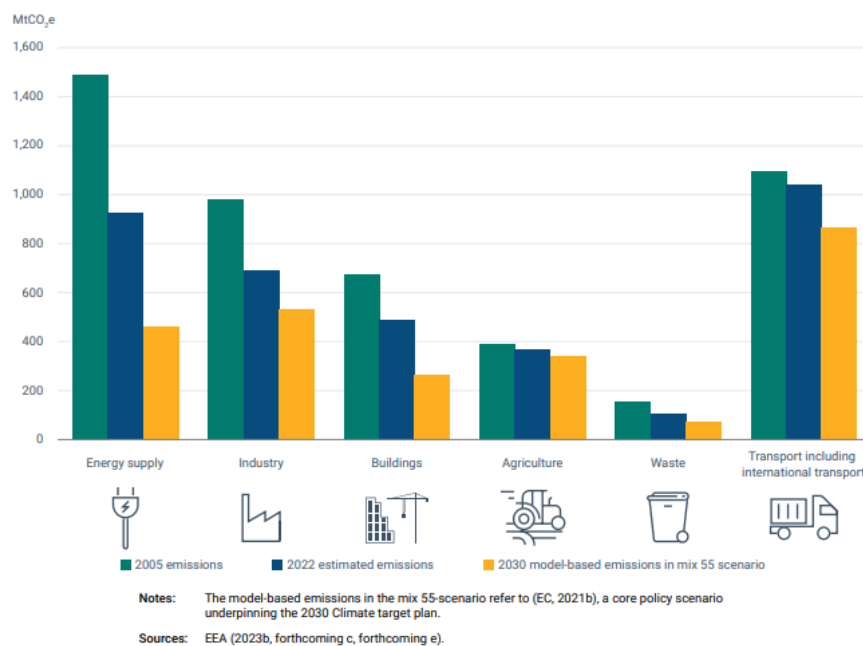
2.2 Trends in GHG emissions

Preliminary data published by the European Environmental Agency (EEA) for 2022 indicate that total net EU greenhouse gas emissions, including international aviation GHG emissions, had decreased by 31% compared to 1990.² In order to achieve the aforementioned targets, decarbonisation needs to pick up speed and happen at twice as fast a rate as over the last 30 years.

Overall progress can be largely attributed to decreasing emissions in the energy supply, industry, and buildings sectors, whereas emissions from transport and agriculture have seen only marginal changes since 2005. Excluding international aviation, transport now accounts for 23% of the EU’s total greenhouse gas emissions. More than 75% of the sector emissions are linked to emissions from road transport.

Graph 1: Sectorial progress towards 2030

European Environmental Agency: Sectorial progress towards 2030



² EEA Report 07/2023: Trends and projections in Europe in 2023.

2.3 Calculating potential GHG savings from cycling

Substituting motorised car trips by cycling reduces GHG emissions and improves energy efficiency.

A 2021 study collected travel activity data from 3,836 participants over seven European cities (Antwerp, Barcelona, London, Orebro, Rome, Vienna and Zurich). Researchers found that the more people cycled or walked, the fewer mobility-related lifecycle CO₂ emissions were generated. Specifically, they noted that cyclists had 84% lower daily travel lifecycle CO₂ emissions than participants who did not cycle. “An average person who ‘shifted travel modes’ from car to bike decreased life cycle CO₂ emissions by 3.2 kgCO₂/day”, the paper states.³

In a separate paper, the same researchers concluded that an average person cycling 1 trip/day more and driving 1 trip/day less for 200 days a year would decrease mobility-related lifecycle CO₂ emissions by about 0.5 tonnes over a year.⁴

This compares with the carbon footprint per year per person for all transport activity which was 2.33 tonnes of CO₂ in 2022.⁵

3. Assessing the role of cycling in the NECPs

3.1 Methodology: The 13 ECF indicators

To determine the role of cycling, we have assessed the 26 available draft NECPs 2021 – 2030 using a set of 13 indicators for a total of 10 points. The indicators have remained the same compared to previous ECF reports⁶, with the exception of indicator 5, ‘Defined national budget for cycling’. Here, we increased the minimum threshold to achieve 1 point from 4 Euro per annum per capita to 10 Euro to take inflation and new insights into necessary minimum central government investments into account.

The 13 indicators are the following:

³ Christian Brand et al: The climate change mitigation effects of daily active travel in cities, 2021.

⁴ Christian Brand et al: The climate change mitigation impacts of active travel: Evidence from a longitudinal panel study in seven European cities, 2021.

⁵ Transport & Environment, The State of European Transport, 2024.

<https://transport2024.transportenvironment.org/sot/index.html>

⁶ ECF, Cycling Underrepresented in EU Member States’ Final National Energy and Climate Plans

https://ecf.com/system/files/ECF%20analysis%20of%20cycling%20in%20final%20NECPs_FINAL_8%20October%202020.pdf

1. Reference to cycling, or at least to “soft, active mobility” (0.5 pt.)
2. General commitment to modal shift with increased cycle use (1 pt.)
3. Measurable target to grow cycling by 2030 (or another year) (1 pt.)
4. General commitment to invest in cycling (1pt.)
5. Defined national budget for cycling
 - 5.1. Less than EUR 10 per annum per capita (0.5 pt.)
 - 5.2. More than EUR 10 per annum per capita (1 pt.)
6. Reference to a Sustainable Urban Mobility Plan (SUMP) or Mobility management (1 pt.)
7. Reference to a National Cycling Strategy (1 pt.)
8. Reference to a (Active) Mobility Law (1 pt.)
9. Reference to building, developing cycling infrastructures (0.5 pt.)
10. Reference to enhancing inter-modality (0.5 pt.)
11. Reference to improving road safety for cyclists (0.5 pt.)
12. Reference to awareness-raising and promotion of cycling (0.5 pt.)
13. Reference to introducing fiscal incentives (0.5 pt.)

The sum of the score of the 13 indicators led us to cluster the NECPs into five categories:

- An excellent role for cycling (8 to 10 points)
- A good role (6 to 7.5 points)
- A moderate role (4 to 5.5 points)
- An unsatisfactory role (2 to 3.5 points)
- An insufficient – or non-existent – role (0 to 1.5 points).

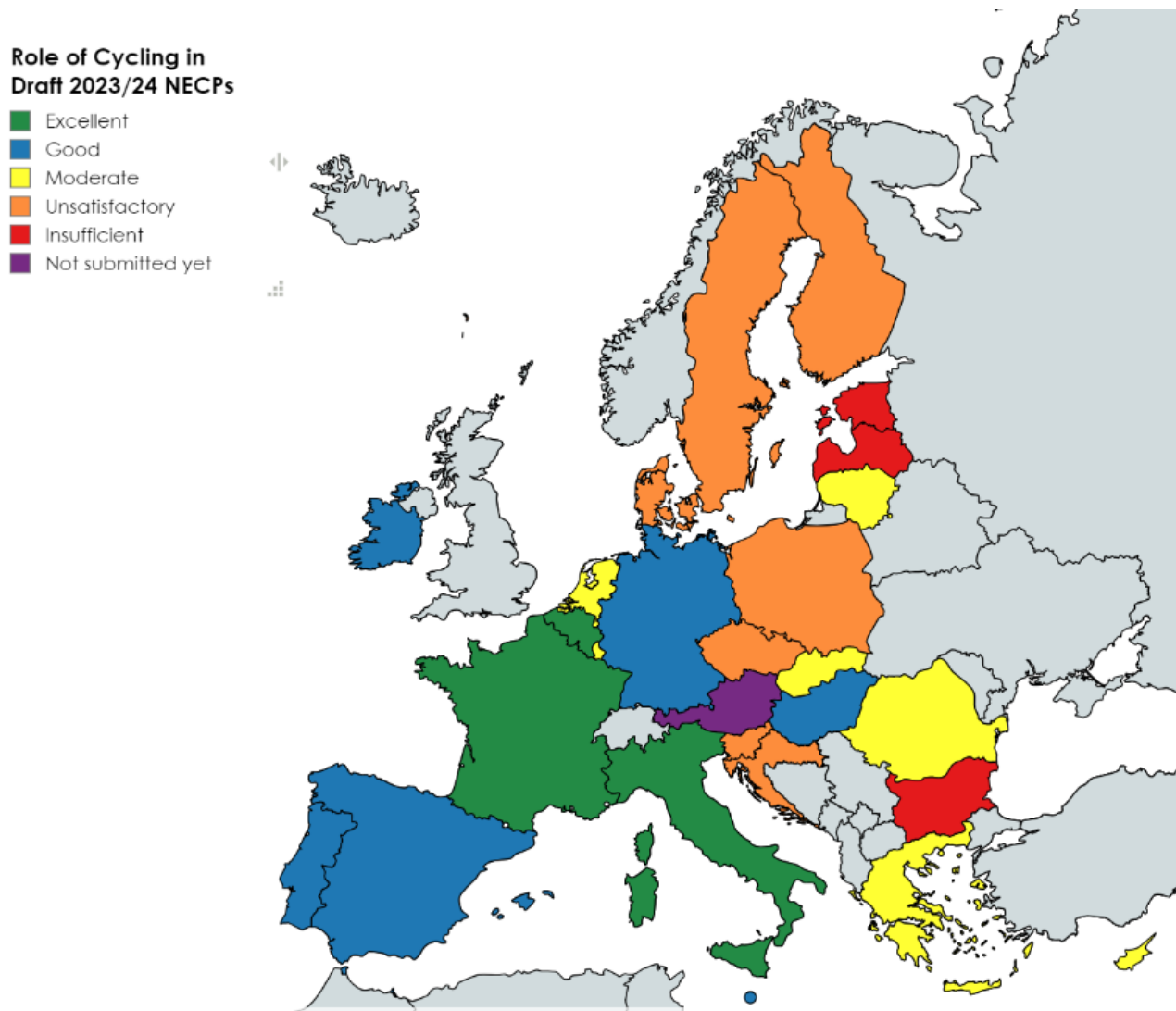
3.2 Total score and EU countries' ranking

Scoring the 26 NECPs varies between 0 points for Latvia and 9 points for Belgium.

The total score of the Member States' draft NECPs is **4.63/10**. This is only an incremental increase against the 2019 final NECP score of 4.35/10. The very first draft NECP from 2018 was rated at 2.7/10.

The map below presents ECF's assessment of how the individual countries scored.

Map 1: Role of Cycling in Draft 2023/24 NECPs



www.mapchart.net

Table 1: NECP Assessment Table

This table summarises how countries score against the 13 ECF indicators.

Assessment	EU Member States
EXCELLENT (8-10): Strong reference to cycling in the draft NECP. There are clear commitments to modal shift and manifold actions to achieve that shift.	Belgium (9), France (8.5), Italy (8)
GOOD (6-7.5): Cycling is clearly referenced in the draft NECP, thanks to numerous indications on the implementation of pro-cycling policies.	Germany (7), Hungary (6), Ireland (6), Malta (7.5), Portugal (6.5), Spain (7)
MODERATE (4-5.5): Cycling is clearly referenced in the draft NECP; the essential information regarding pro-cycling policies is provided.	Cyprus (5.5), Greece (5), Lithuania (5), Luxembourg (4), Netherlands (4.5), Romania (4.5), Slovakia (5.5)
UNSATISFACTORY (2-3.5): Cycling is referenced in the draft NECP, and some pro-cycling measures are mentioned. The margin for improvement is considerable.	Croatia (3.5), Czechia (3), Denmark (2.5), Finland (2), Poland (3), Slovenia (2), Sweden (2)
INSUFFICIENT (0-1.5): Very weak or complete absence of references to cycling in the draft NECP.	Bulgaria (1.5), Estonia (1.5), Latvia (0)
Not assessed due to non-submission of draft NECP	Austria

3.3 Highlights per indicator

This table highlights some good practice examples per indicator:

Table 2: Highlights per indicator

Indicator	Country	Measure
Modal shift goal	Estonia	“A balanced shift towards environmentally friendly modes of transport, i.e. the share of public transport, cycling and walking should be 55 % by 2035, including 60 % in urban areas.”
Measurable target to grow cycling by 2030 (or another year)	Flanders (Belgium)	“The target is to increase the share of cycling to 20 % of journeys by 2025. We want to increase the share of cycling to 30 % by 2040.”

Defined budget for cycling	Netherlands	“By contributing EUR 780 million to the creation of new housing sites by bike and on foot, the Netherlands makes a structural contribution to a national network of cycling routes.”
Reference to a Sustainable Urban Mobility Plan/ Mobility Management	Italy	“By Ministerial Decree No 444/21, the adoption of SUMP became a prerequisite since January 2023 for access to funding for both Mass Rapid Transit and Cycling.”
Reference to a National Cycling Strategy	Hungary	“The National Cycling Strategy sets out the objectives, direction and financial background for the development of cycling for the period 2023-2030.”
Reference to a (Active) Mobility Law	France	“The Mobility Orientation Law (LOM) created a set of measures to promote modal shift: <ul style="list-style-type: none"> • Strengthening collective and shared transport: a 40 % increase in transport investments between 2014-2018 and 2019-2023 to improve daily transport.”
Building, developing cycling infrastructures	Luxembourg	“The national cycle network is planned and built by the MMTP and will be extended from 650 km to 1,100 km.”
Reference to inter-modality	Germany	“In various programmes, the Federal Government provides comprehensive funding for investment and non-investment promotion and financing of cycling under the responsibility of the Länder and municipalities, including programmes to support bicycle parks at railway stations.”
Improving road safety for cyclists	Greece	“Active human-powered mobility: Promotion of provisions of the Road Cycling Code; The lowering of the speed threshold from 50 to 30 km/h will play a major role in sustainable mobility, to promote alternative forms of mobility (pedestrian, cycling, micro-mobility) in order to ensure safe traffic and the coexistence of all road users.

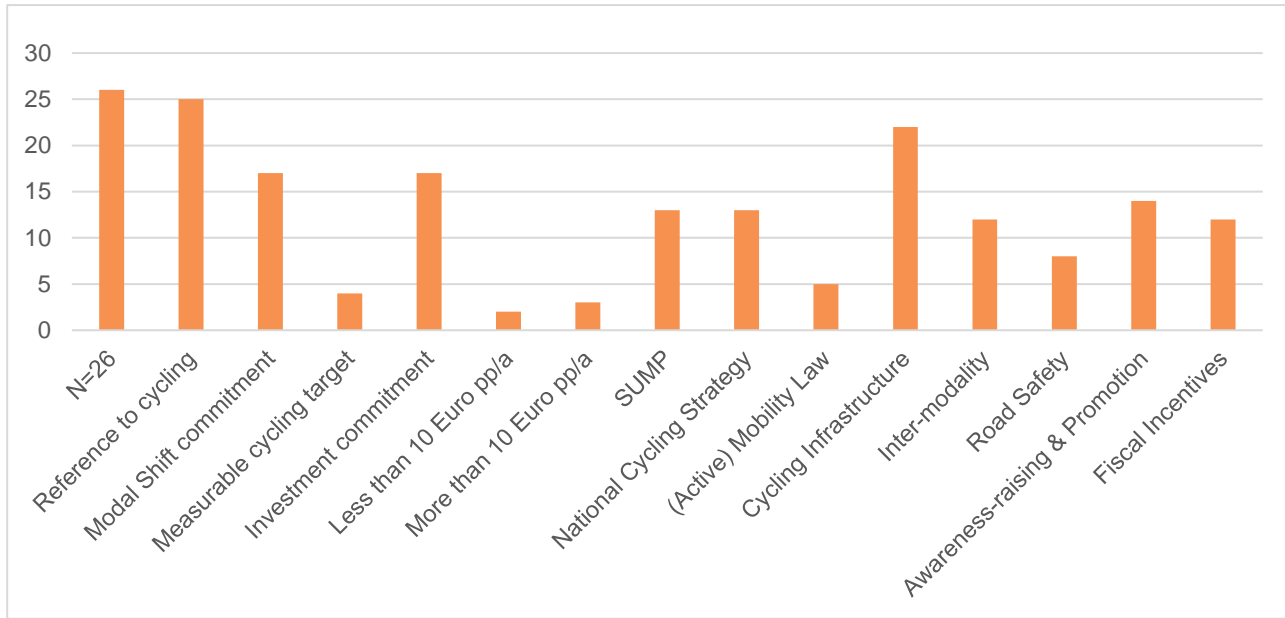
Awareness-raising and promotion of cycling	Portugal	“Promoting the adoption of behaviours favourable to active modes, in particular in relation to bicycle use, implies an integrated “marketing” and communication effort—including continuous and consistent awareness campaigns, impactful events and activities, as well as education that promotes active modes and road citizenship—oriented to encourage a profound change in attitudes.”
Introducing fiscal incentives to support cycling	Belgium	“With regard to the generalisation of the bicycle allowance, the use of cycling as a sustainable means of transport for journeys between home and work was made possible for all employees in the private sector following supplementary sectoral agreement No 164 of 24/01/2023.”

3.4 How draft NECPs score against the 13 ECF Cycling Indicators

This table shows how the 26 draft NECPs score against the 13 ECF Cycling Indicators. Key findings include:

- With the exception of Latvia, every draft NECPs referred to ‘cycling’ at least once;
- Building cycling infrastructure was included in 22 draft NECPs;
- About two-thirds of draft NECPs make a general commitment to modal shift (17) and investments in cycling (17). However, very few plans get very specific regarding a measurable cycling target (4) or dedicated budgets (5).
- About half of draft NECPs refer to ‘Awareness-raising and promotion’ (14), ‘SUMP’s’ (13) as well as a ‘National Cycling Strategy’ (13), promoting ‘Intermodality’ (12) and introducing ‘Fiscal incentives’ (12).
- Road safety measures are included in 8 plans; an (Active) Mobility Law by only 5.

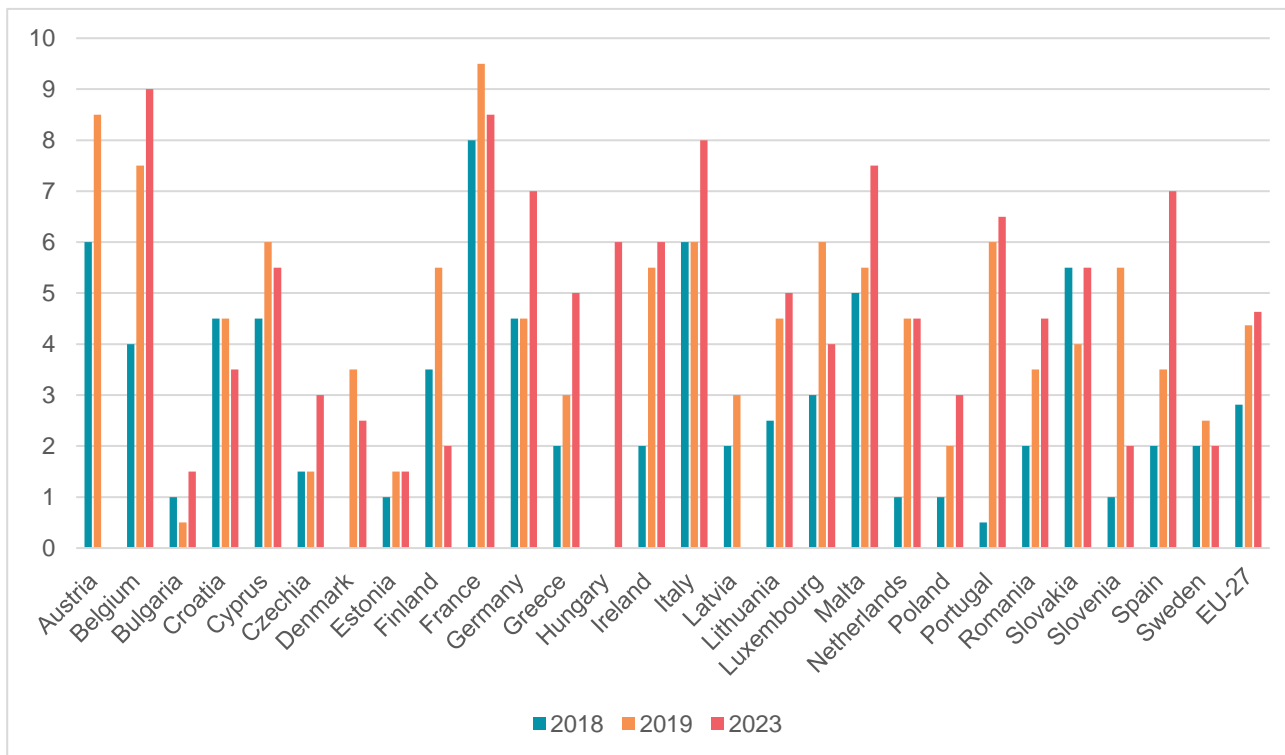
Graph 2: The 13 ECF Cycling Indicators



3.5 Cycling in NECPs: Climbers and Divers

This graph shows the evolution between the 1st generation of draft (2018) and final (2019) NECPs as well as the 2nd generation draft NECP (2023/24). Four countries have made considerable progress, and three countries backslide.

Graph 3: Cycling in NECPs: 2018 – 2019 - 2023



Climbers: These Member States improved their cycling score

- Belgium: 4 – 7.5 – 9. Belgium achieved the highest score among all EU-26, thanks to strong political leadership by Deputy Prime Minister and Transport Minister Georges Gilkinet, who also spear-headed the Belgian-led initiative of the European Bicycle Declaration from 2022.⁷ The first national cycling strategy, BECyclist, adopted in 2021, as well as ambitious cycling modal share targets and strong budget commitments through its regions, complement the picture. Flanders commits to invest 300 million Euro annually into cycling measures, and Wallonia 210 million Euro for the 2022-2024 programming period.
- Hungary: 0 – 0 – 6. Whereas Hungary neglected cycling measures entirely in its first generation NECP, it now refers strategically to its new national cycling strategy adopted in 2023. Hungary also commits to reducing the number of road fatalities of people cycling from 70 to 35 by 2030.
- Portugal: 0.5 – 6 – 6.5. The biggest jump happened between the 1st generation draft and final NECP five years ago, around the same time when Portugal adopted its first national strategy for active mobility. To improve further, Portugal should commit to dedicated investment budgets in support of cycling, in particular, to finance the 1,000km of new cycling infrastructure announced as part of the Programme Portugal Cyclable 2030.
- Spain: 2 – 3.5 – 7. The country has made significant progress in recent years in terms of sustainable urban mobility, and this is reflected by the higher attention paid to cycling measures in its new draft NECP. The 2021 national cycling strategy adopted has set things in motion when it comes to building infrastructure, providing bicycle parking spaces, and operating bike-sharing schemes.

Divers: These Member States decreased their cycling score

- Luxembourg: 3 – 6 – 4. The good news is that Luxembourg is still committed to expanding its national cycling network from 650km to 1,100km. Yet there is little additional mention of cycling in the new draft NECP. Luxembourg is advised to strongly include its cycling policies in its final NECP.
- Finland: 3.5 – 5 – 2. The generally low scores in the Nordic-Baltic region spilt over to Finland. While the first generation final NECP was awarded a ‘moderate’ score, Finland now scores an ‘unsatisfactory’. This may be due to a change in government in 2023 that is giving less political

⁷ <https://ecf.com/news-and-events/news/european-bicycle-declaration-six-european-countries-call-eu-cycling-strategy>

support to cycling than the previous one. Specifically, any reference to a national cycling strategy and concrete budget commitments have been removed.

- Slovenia: 1 – 5.5 – 2. Slovenia is a roller coaster. While it strongly improved between the first generation draft and final NECP, the 2nd generation NECP is taking us back to where it started. The process of developing a national cycling strategy should be completed and acknowledged by integrating it into the 2nd generation final NECP.

4. Overall ECF assessment

Across the EU, cycling in the 2023/24 draft NECPs has largely stagnated compared with the 2019 final NECPs. This is somewhat disappointing given that the EU just adopted the first-ever 'European Declaration on Cycling' in April 2024. It is expected that the final NECPs will better reflect that new political recognition and translate it into concrete Member State commitments.

Draft NECPs score strong when it comes to paying general support to cycling. 'Cycling' is mentioned in 25 out of 26 submitted draft NECPs, and commitments to develop cycling infrastructure are included in 22 out of 26. Paradoxically, concrete budget commitments to build that infrastructure are included in just 5 draft NECPs. That gap needs to be closed!

By integrating cycling into national climate and energy policies, cycling policies are put on a broader – and more stable political platform.

Cycling is a no-regret investment: It carries tremendous benefits for mobility, public health, tourism, employment, and the environment. But its benefits are not limited to those.

Being the most energy efficient of all transport modes, it should become a cornerstone of climate and energy policies as well. As a consequence, measures to decarbonise the transport sector such as purchase subsidies for electric cars, must always be extended to (electric) bicycles as a matter of fairness, and economic rationale.

5. Call to Action

The 2023/24 draft NECPs have been released, but there is still time to add measures for cycling in the final NECPs that Member States need to submit to the European Commission by June 2024.

ECF calls upon all Member States that still underperform, in particular those with scores lower than 6, to take immediate action, in particular with regard to:

- Measurable targets to grow cycling by a specific year;
- Developing and implementing a national cycling strategy;
- Actions related to road safety in order to reduce the number of cyclists killed and seriously injured;
- Dedicated and sustained budgets to build the kind of infrastructure to unlock the full potential of cycling.

To make a climate-neutral Europe by 2050 a reality, we need greater cycling ambition.

References

Christian Brand et al: The climate change mitigation effects of daily active travel in cities, 2021.

<https://www.sciencedirect.com/science/article/pii/S1361920921000687>

Christian Brand et al: The climate change mitigation impacts of active travel: Evidence from a longitudinal panel study in seven European cities, 2021.

<https://www.sciencedirect.com/science/article/abs/pii/S0959378021000030>

European Commission's website, National Energy and Climate Plans:

https://commission.europa.eu/energy-climate-change-environment/implementation-eu-countries/energy-and-climate-governance-and-reporting/national-energy-and-climate-plans_en

European Commission's website, European Green Deal:

https://ec.europa.eu/info/strategy/priorities-2019-2024/european-green-deal_en

European Declaration on Cycling (C/2024/2377)

https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=OJ%3AC_202402377

European Cyclists' Federation, Cycling Underrepresented in EU Member States' Final National Energy and Climate Plans, 2020.

<https://ecf.com/users/fabian-k%C3%BCster/trusted-content/cycling-underrepresented-eu-member-states%E2%80%99-final-national-energy-and-climate-plans>

European Cyclists' Federation, The State of National Cycling Strategies (2023).

<https://ecf.com/users/fabian-k%C3%BCster/trusted-content/state-national-cycling-strategies-europe-2023>

European Environmental Agency, EEA Report 07/2023: Trends and projections in Europe in 2023.

<https://www.eea.europa.eu/publications/trends-and-projections-in-europe-2023>

Transport & Environment, The State of European Transport, 2024.

<https://transport2024.transportenvironment.org/sot/index.html>

Annex A: The role of cycling in the NECPs through 13 indicators per country

Country	Reference to cycling (0.5 pt)	Commitment to modal shift with increased cycle use (1)	Measurable target to grow cycling (1)	Commitment to invest in cycling (1)	Annual budget <EUR 10 per capita (0.5)	Annual budget >EUR 10 per capita (1)	SUMP or Mobility Management Plan (1)	National Cycling Strategy (1)	(Active) Mobility Law (1)	Cycling infrastructure (0.5)	Inter-modality (0.5)	Road safety (0.5t)	Cycling promotion (0.5)	Fiscal incentives (0.5)	Total score
Austria															
Belgium	x	x	x	x		x	x	x		x	x	x	x	x	9
Bulgaria	x						x								1.5
Croatia	x						x			x	x		x	x	3.5
Cyprus	x	x	x	x			x			x			x		5.5
Czechia	x						x	x		x					3
Denmark	x			x						x			x		2.5
Estonia	x	x													1.5
Finland	x			x						x					2
France	x	x	x	x			x	x	x	x		x	x	x	8.5
Germany	x	x	x	x				x		x	x	x	x	x	7

Greece	x	x					x	x		x		x		x	5
Hungary	x	x		x				x		x	x	x	x	x	6
Ireland	x	x		x		x				x	x		x		6
Italy	x	x		x	x		x	x	x	x	x	x		x	8
Latvia															0
Lithuania	x	x					x			x	x	x	x	x	5
Luxembourg	x			x				x		x	x			x	4
Malta	x	x		x	x		x	x		x	x	x	x	x	7.5
Netherlands	x			x		x		x		x			x		4.5
Poland	x	x					x						x		3
Portugal	x	x		x			x	x		x	x		x	x	6.5
Romania	x	x		x					x	x				x	4.5
Slovakia	x	x		x				x	x	x	x				5.5
Slovenia	x	x								x					2
Spain	x	x		x			x	x	x	x	x		x		7
Sweden	x			x						x					2
	26	17	4	17	2	3	13	13	5	22	12	8	14	12	4.63

European Cyclists' Federation

Mundo Madou

Rue de la Charité 22

B-1210 Brussels

