

# Cycling Underrepresented in EU Member States' Final National Energy and Climate Plans

European Cyclists' Federation

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8 October 2020



ECF gratefully acknowledges the financial support from both the Life Programme of the European Commission and the cycling industry via Cycling Industries Europe. The information and views set out in this publication are those of the author(s) and do not necessarily reflect the official opinion of the European Union. Neither the European Union institutions and bodies nor any person acting on their behalf may be held responsible for the use which may be made of the information contained therein.



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## 2. Disclaimer

ECF wants to stress that our approach is strictly limited to assessing the place of cycling within the National Energy and Climate Plans (NECPs) and should neither be understood as an evaluation of the EU countries' national support to cycling nor as an overall appraisal of the status of cycling in Member States as a whole.

Although the Member States were required to submit their final NECPs by the end of 2019, several countries submitted their NECPs months late. Because the countries submitted at different stages, we note that the countries who submitted later have possibly an advantage over those who submitted earlier. Indeed, many post-Covid-19 lockdown measures for cycling were not taken into account for this assessment.



### 3. Executive summary

In the European Green Deal, released late 2019, the Commission announced its decarbonization objective: no net emissions of greenhouse gases by 2050. To achieve this objective, transport emissions must be reduced by 90% by 2050 compared to 1990. Because the National Energy and Climate Plans (NECPs) are among the EU's primary methods to meet its climate goals, these plans must include bold transport decarbonization measures. There is no conceivable way for the EU to achieve decarbonization without a major, further shift towards more cycling. In fact, a Global High Shift scenario with an emphasis on cycling and e-cycling could cut CO<sub>2</sub> emissions from urban transport by nearly 7% by 2030. To achieve zero-carbon emissions across Europe by 2050, it is therefore vital that European countries strongly support and fund cycling.

To determine the role of cycling, we assessed the 27 draft and final NECPs 2021 – 2030. We found that the attention given to cycling has improved since the (2018) draft NECPs: from a draft score of 2.7/10, the final NECPs scored 4.35/10. However, many Member States still did not add enough measures to support or fund cycling. This moderate score shows that Member States have begun to take the decarbonization potential of cycling seriously, but there is still a long way to go. Cycling must be considered a necessary tool to decarbonize road transport.

ECF analysis also shows a discrepancy in certain national policy frameworks (National cycling strategies, national climate laws) where considerable higher attention has been paid to cycling than in their NECP.

The final NECPs have been released, but there is still time to add measures for cycling. The targets set in these NECPs reflect current emission reduction policies that will only reduce GHG emissions by 40% 2030. But, in September 2020 the European Commission published a legislative proposal to increase the GHG emission reductions target for 2030 to minus 55% compared to 1990 levels. In the near future, Member States will need to rework their NECPs to fit this new emission reduction objective.

ECF calls upon all Member States to 1) fully integrate concrete cycling measures during the NECP implementation phase, in particular earmarked and sustained funding, and 2) include these additional cycling measures in the 2022 progress reports. To make a climate-neutral Europe by 2050 a reality, we need greater cycling ambition.



## 4. Introduction

The European Commission put forward an objective in late 2018: achieving a net-zero greenhouse gas (GHG) emission economy by 2050. In December 2019, the Commission announced the European Green Deal that claims: without a 90% reduction in transport emissions by 2050, climate neutrality would be impossible. ECF fully supports the need to decarbonize the European economy, and views growing bicycle use as a necessary part of the solution. Indeed, at the time of writing it is clear that more and more Member States are getting behind this objective. However, looking at past GHG emission trends in the EU, there is not much cause for optimism. The transport sector, in particular, has so far failed to contribute: in 2017, CO<sub>2</sub> emissions were 23.1 % higher than in 1990, and road transport accounted for 72% of total GHG emissions of the transport sector.

To achieve a net-zero GHG emission economy by 2050, the European Commission has introduced a new policy tool, the National Energy and Climate Plans (NECPs). Member States are required to define long-term strategies on how they plan to eliminate GHG emissions for each economic sector, including transport.

Cycling is by far the most energy-efficient of all transport modes, if the right support was provided, a significant contribution to decarbonize the transport sector could be made. For example, if greater investments for building safe and convenient cycle route networks were made, many short-and medium distance car and van trips, both passenger and freight, could be shifted to cycling.

As part of the 2015 Luxembourg and 2018 Graz Declaration, Member States acknowledged cycling to be on equal footing with motorized transport and called for modal shift policies. Against this background, ECF analysed all 27 NECPs to assess the attention paid to cycling measures in their carbon reduction strategies. Thirteen different indicators were identified for each country, ranking Member States from excellent to insufficient.



## 5. Overall Climate and Energy Context

### 5.1 The 2030 Climate and Energy Framework

This framework, as proposed by the European Commission in 2014, sets the triple 40 - 27 - 27 objectives:

- a binding EU target of at least 40% less greenhouse gas emissions by 2030, compared to 1990
- a target, binding at EU level, of at least 27% renewable energy consumption in 2030
- an indicative target at EU level of at least 27% improvement in energy efficiency in 2030

The National Energy and Climate Plans (NECPs) are among the EU's key instruments to meet its climate change goals. Simply put, the EU and Member States have agreed that all countries should, every 10 years, develop a 10-year plan setting out how they will meet their climate change commitments (2030 Climate and Energy Targets, and the Paris Agreement). It is clear to ECF that cycling should play a prominent role in Member State plans, given the negative track record of the transport sector since 1990.

The first national plans should cover the period from 2021 to 2030, including a perspective until 2050, to ensure long term consistency in policy objectives. The first drafts were due 31 December 2018 and the final NECPs were due by the same date a year later. Every two years after the final NECP was submitted, each country must submit a progress report.

### 5.2 European Green Deal and Climate Law

Although the EU has made considerable progress in reducing GHG emissions, its 2030 objectives are not in line with the Paris Agreement. This is the reason why the Von der Leyen Commission proposed the European Green Deal in December 2019, envisioning a net-zero carbon economy by 2050. To transform this political commitment into a legal obligation, a proposal for a European Climate Law was put forward in May 2020.

On its trajectory towards net-carbon GHG emissions by 2050, the Commission presented in September 2020 a plan to increase the EU's GHG emission reduction target for 2030 to minus 55% compared with 1990 levels by September 2020. The adoption of this law is planned for 2021. Then, the Commission's policy tools, including the NECPs will be reviewed and revisions will be proposed.

Also as part of the European Green Deal, and in order to '[accelerate] the shift to sustainable and smart mobility', the Commission has promised to adopt a strategy for sustainable and smart mobility in 2020. This new strategy will challenge emission sources and detail the changes necessary for Europe to quickly transition to sustainable mobility.



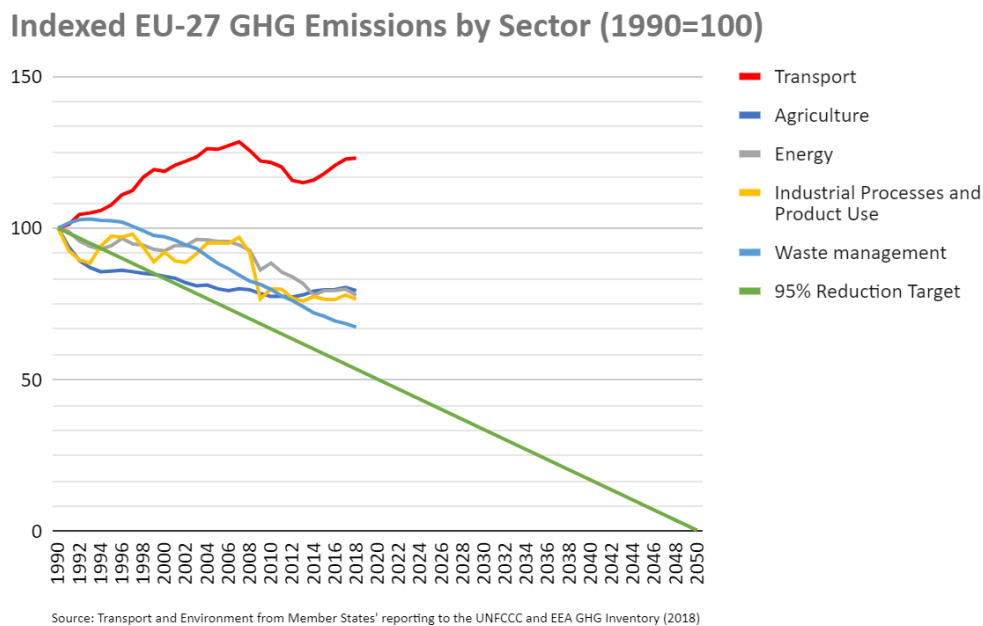
### 5.3 Trends in GHG emissions

#### Emissions per sector

The increase in human-caused greenhouse gas emissions are the most significant driver of climate change since the mid-20th century.<sup>1</sup> Scientists have concluded that an increase in temperature beyond 2°C (as compared to pre-industrial times) would cause critical damage to the earth's environment.<sup>2</sup> Decisive action to reduce GHG emissions is needed.

Some sectors need targeted emission reductions strategies more urgently more than others. Whereas overall GHG emission in the EU fell by 23 % in 2018 compared to 1990 levels, emissions in the transport sector saw a spike of 23.1 %.

Figure 1: Indexed EU-27 GHG Emissions by Sector 1990-2050



As clearly shown in Figure 1, transport is the only sector that continues to see an overall increase in GHG emissions. Indeed, the transport sector makes up a staggering quarter of the EU's GHG emissions. To achieve the 90% reduction of transport emissions objective in the EU Green Deal, significant changes will have to be made in the transport sector - and quickly.

<sup>1</sup><https://www.ipcc.ch/site/assets/uploads/2018/02/ar4-wg1-spm-1.pdf>

<sup>2</sup>[https://ec.europa.eu/clima/change/causes\\_en](https://ec.europa.eu/clima/change/causes_en)



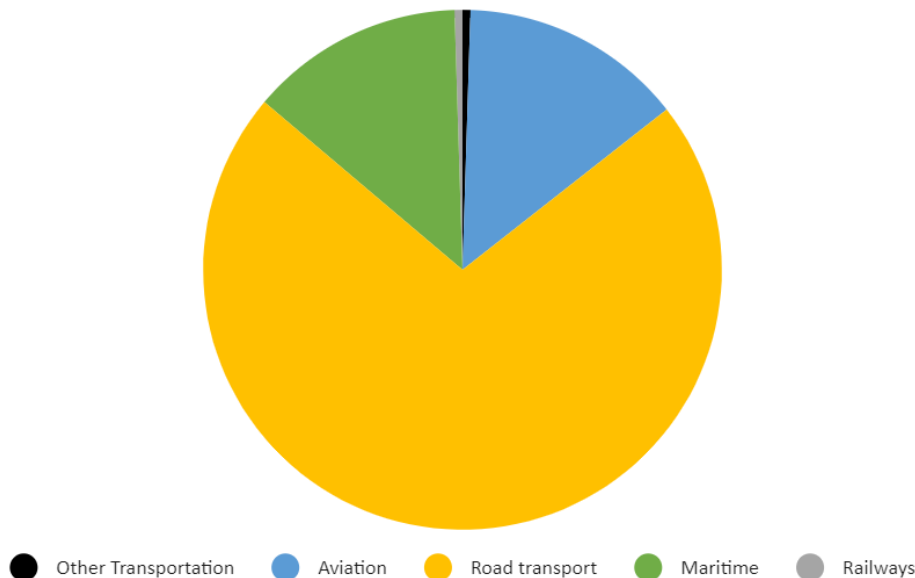
## Emissions per mode

Within the transport sector, road transport has the highest GHG emissions. In 2018, road transport emissions made up [71.7 %](#) of the total GHG transportation emissions. It follows that a modal shift from and within the road transport sector, then, has the highest potential to reduce GHG transport emissions.

Indeed, the CO<sub>2</sub>-savings potential could be much improved if cycling was better integrated into the overall transport system, most notably with public transport. Long-distance car trips account for a relatively small portion of overall trips in terms of numbers but represent a significant part of the road transport GHG emissions. Better intermodal solutions, such as substituting car trips by bike-train-bike trips, would significantly increase the CO<sub>2</sub>-savings potential for the transport system. For example, in the Netherlands, almost 50 % of train users use the bicycle to get to the railway station. This integration requires adequate bicycle parking facilities at such stations.

Figure 2: Share of EU-28 Transport GHG Emissions per Mode (2017)

### Share of EU-28 Transport GHG Emissions per Mode (2017)



## 5.4 Calculating potential GHG savings from cycling

Increasing cycling levels in Europe would reduce GHG emissions. For context, we have included four reports that calculate the amount of GHG cycling currently saves in Europe and could save in Germany and globally.

### ECF 2018 report

In ECF's 2018 report, *The benefits of cycling: unlocking their potential for Europe*, we used the WHO Health Economic Assessment Tool (HEAT) for Cycling. This tool has traditionally been used to calculate the socio-economic benefits of investments in cycling. The WHO's expanded tool now includes the GHG emissions savings potential through a shift to cycling.





With the WHO HEAT for cycling tool, we found that cycling saves emissions equaling more than 16 million tons of CO<sub>2</sub> equivalents per year in the EU. Although cycling is not yet widely acknowledged as a tool to decarbonize transport, it is evident that cycling is a powerful tool to reduce GHG emissions.

#### German Federal Environment Agency study

The German Federal Environment Agency released a study in 2013 that estimated: road transport CO<sub>2</sub> emissions could be reduced by 11.2 % if the road transport modal share of cycling grew from 11 % to 49 %. Using mobility data from more than 175,000 people, the researchers determined that if respondents considered a route "doable", bicycles trips could replace almost every third trip taken by car (5 km and under). Indeed, the study concluded that, with an integrated approach promoting active mobility and intermodality, potential emission reductions could increase to 27.4 %.

#### ITDP report

A 2015 report by the Institute for Transportation and Development Policies (ITDP) and the University UC Davis, revealed that a Global High Shift (GHS) scenario with an emphasis on cycling and e-cycling could cut CO<sub>2</sub> emissions from urban transport by nearly 7% by 2030. This successful reduction in emissions depends on vital investments and policies to support cycling. With continuous support, the reduced emissions in a high shift cycling scenario could rise as high as 11% by 2050.

Within Europe, the emission reduction potential could be even higher. The HSC scenario achieves an 11% combined cycling/electric cycling share of urban passenger travel distance *worldwide* by 2030 (compared to 6% without HSC). European countries had the highest % of modal share for cycling in 2015, and were projected to have the highest modal share for cycling by 2030 and 2050 respectively. If European countries support key cycling policies, the potential reduced emissions by 2030 could be higher than 11% within the EU!

#### 2020 climate change mitigation effects of active travel report

A new study, produced by more than 20 researchers from Stockholm to Oregon, collected travel activity data from 3,836 participants over seven European cities. In Antwerp, Barcelona, London, Orebro, Rome, Vienna, and Zurich they found that the more people cycled or walked, the fewer mobility-related lifecycle CO<sub>2</sub> emissions were generated. Specifically, they noted that 1) cyclists had 84% lower daily travel lifecycle CO<sub>2</sub> emissions than participants who did not cycle; 2) car travel generated 70% of daily mobility-related life cycle CO<sub>2</sub> emissions, compared with the 1% generated by cycling; 3) taking one less car trip and one more bike trip a day decreased life cycle CO<sub>2</sub> emissions from transport by 67%.

From these and other findings, the researchers concluded - contrary to popular arguments - that cycling is a substitute to motorized transport, not only extra travel in addition to motorized trips. Indeed, the researchers surmised that if 10% of the population shifted modes from car (from 3 to 2 trips a day) to bicycle, relevant emissions would likely decrease by approximately 10%.



## 6. Assessing the role of cycling in the NECPs

### 6.1 Methodology

To determine the role of cycling, we have assessed the 27 NECPs 2021 – 2030 using a set of 13 indicators for a total of 10 points. We paid attention to these four major elements:

1. References to cycling and modal shift goals (towards cycling) (1 - 3);
2. Commitments to make public investments in favour of cycling (4-6);
3. Clear references to national cycling strategies, (active) mobility laws, sustainable mobility management and Sustainable Urban Mobility Planning (7 - 9);
4. References to targeted pro-cycling measures (10 – 13).

The 13 indicators are the following:

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 4 per capita (0.5 pt.)
  - 5.2. More than EUR 4 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.)

This assessment has allowed us to cluster the NECPs into five categories, according to their score:

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



## 6.2 EU countries' ranking

This map presents ECF's assessment of the role cycling plays in the EU-27 final NECPs. The countries were rated: excellent, good, moderate, unsatisfactory, or insufficient and then colour-coded accordingly.

Figure 3: Final NECP Assessment Map 2020

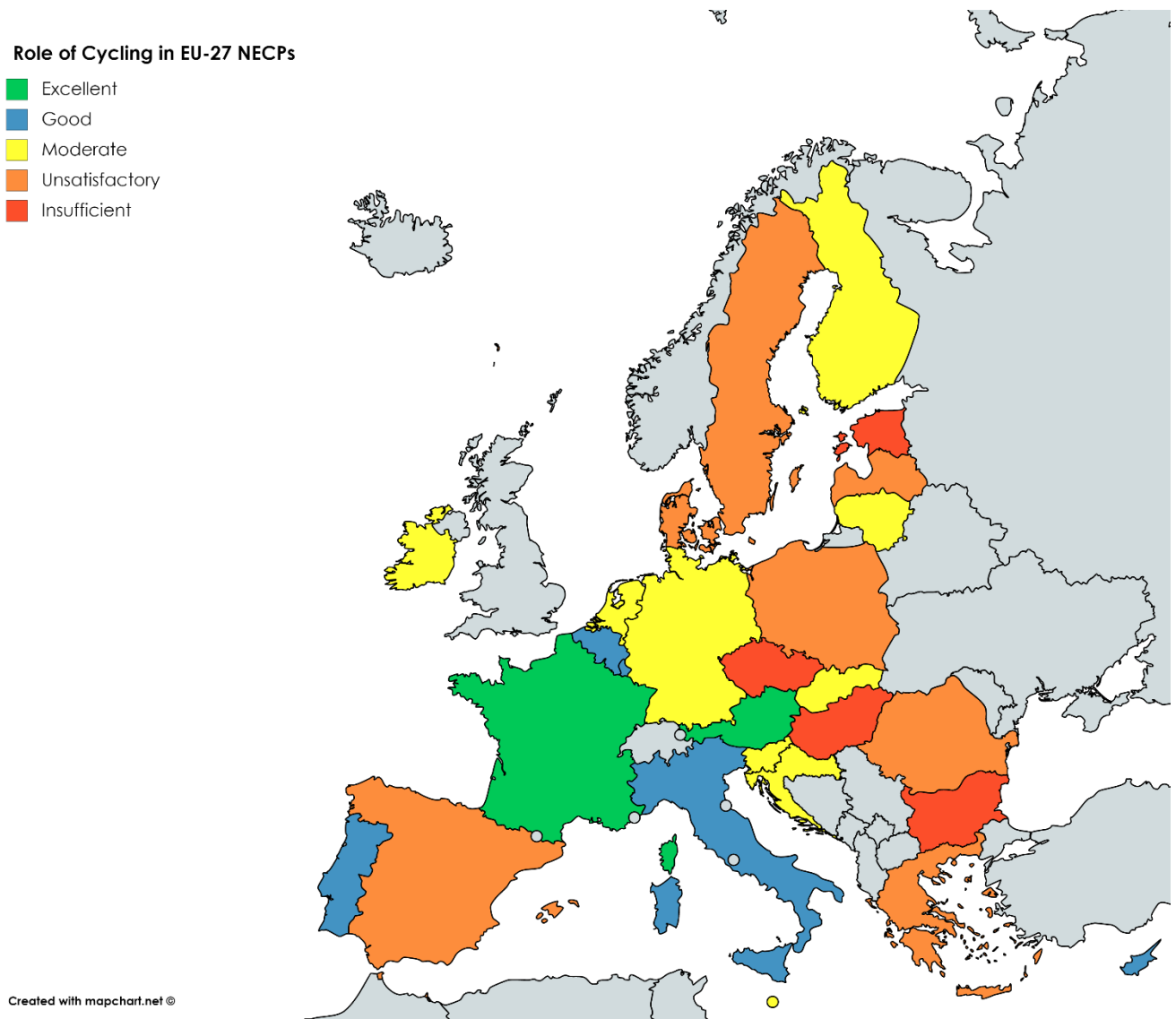


Figure 4: NECP Assessment Table

Assessment	EU Member States
EXCELLENT: Strong reference to cycling in the draft NECP. Including a clear budget, commitment to modal shift and reference to a cycling or active mobility law.	France (9.5), Austria (8.5)
GOOD: Cycling is clearly referenced in the draft NECP, thanks to numerous indications on the implementation of pro-cycling policies towards climate change mitigation.	Belgium (7.5), Cyprus (6), Italy (6), Portugal (6), Luxembourg (6)
MODERATE: Cycling is clearly referenced in the draft NECP; the essential information regarding pro-cycling policies is provided.	Croatia (4.5), Finland (5.5), Germany (4.5), Ireland (5.5), Lithuania (4.5), Malta (5.5), Netherlands (4), Slovakia (4), Slovenia (5.5)
UNSATISFACTORY: Cycling is referenced in the draft NECP, and some pro-cycling measures are mentioned – mainly on developing cycling infrastructure.	Denmark (3.5), Greece (3), Latvia (3), Poland (2), Romania (3.5), Spain (3.5), Sweden (2.5)
INSUFFICIENT: Very weak or complete absence of reference to cycling in the draft NECP.	Bulgaria (0.5), Czechia (1.5), Estonia (1.5), Hungary (0)



## 6.3 Highlights per indicator

This table indicates some good practice examples by highlight.

Figure 5: Highlights per Indicator

Indicator	Country	Measure
Modal shift goal	Cyprus	The modal share of cars in Cyprus is currently over 90%. Their final modal share target is 75% car, 13% public transport, and 12% walking/cycling.
Measurable target to grow cycling by 2030 (or another year)	Austria	The 24 measures in Austria's Federal Cycling Master Plan 2015-2025 will help increase the share of bicycle use from 7% to 13% by 2025.
Defined budget for cycling	Finland	From 2020–2022, through the National Programme for the Promotion of Walking and Cycling, Finland has committed EUR 41 million for active mobility planning and project promotion. Additionally, through the network development projects, 10 million EUR will be allocated for active mobility infrastructure.
Reference to a Sustainable Urban Mobility Plan/ Mobility Management	Malta	The process is currently underway to compile an extension to the first ever SUMP in Malta for the Valletta Region by the end of 2020.
Reference to a National Cycling Strategy	Slovenia	Slovenia will prepare a new national cycling strategy by the end of 2022.
Reference to a (Active) Mobility Law	France	The recently (2019) adopted Mobility Law ("Loi d'orientation des mobilités") will radically reform France's political vision for mobility. The text includes: a national cycling strategy by 2024 and a sustainable mobility subsidy of up to EUR 400/year for employers.
Building, developing cycling infrastructures	Romania	Romania's commitment to cycling focused on developing cycling infrastructure under a program to make tracks for cyclists, including: "bicycle tracks" and "special bicycle compartments in subway and trains" (103).
Reference to inter-modality	Austria	Austria's NECP committed to enhancing



		intermodality with a focus on active mobility through their funding programme: Intermodal Interfaces for Cycling, walking and digitalisation of the transport system (ISR). Additionally, Austria will continue to produce multimodal hubs and work on providing multimodal parking with a focus on public transport and cycling infrastructure connections and services, for e-mobility, bike and e-car sharing.
Improving road safety for cyclists	Belgium	In their final NECPs, Wallonia promised to finance and build secure infrastructure and cyclist-pedestrian priority zones by developing a regional active mobility plan. Indeed, Wallonia has committed to create 1000km of "secure" cyclable tracks by 2030, and 2000 by 2050. Flanders has also committed to equip their roads with the necessary infrastructure to make cyclists safer, with a focus on secure connections to urban hubs. Finally, Brussels promised to develop large traffic calming zones and install a 30 km/hr zone to systematically reduce motor vehicle speeds, reinforced by concrete measures such as signage.
Awareness-raising and promotion of cycling	Portugal	Portugal's NECP went into great detail about its commitment to a society that "values, supports and celebrates walking and cycling" (84). The measures included integrated marketing campaigns for the public and targeted education initiatives from pre-school on active mobility.
Introducing fiscal incentives to support cycling	Italy	Italy has committed to establishing a 'Mobility Voucher' for scrapping motor vehicles: €1,500 per passenger vehicle and €500 per motorcycle. This voucher can buy tickets for public transport or bicycles, including e-bicycles for the following three years. The final NECP also included the 'Experimental Mobility Voucher Programme' that allocates EUR 255 M from 2019-2024.



## 6.4 Improvement Highlights

92.5% of Member States (25/27) added at least 1 measure to support cycling to their Final NECPs. The overwhelming majority of Member states that added measures to support cycling shows consistent support for cycling across Europe on a National level.

The scores of 9 Member States doubled or more. Denmark, Estonia, Ireland, Latvia, Luxembourg, the Netherlands, Poland, Portugal, and Slovenia all radically increased the cycling indicators in their NECPs.

References to fiscal incentives that support cycling grew by 1400%. While only France included a fiscal incentive in their draft NECP, in the final NECPs 14 countries - Austria, Belgium, Cyprus, France, Germany, Italy, Ireland, Lithuania, Luxembourg, Malta, Netherlands, Poland, Portugal, and Slovenia - all included fiscal incentives for cycling.

One Member State scored a 9.5/10. France boosted its score in the final NECP by 1.5 points, gaining the highest overall score out of the Member States. Two new measures were added to its final NECP: 1) a measurable target to grow cycling by 2030 and 2) reference to a sustainable mobility plan. The Clean Mobility Development Strategy (SDMP) presents the vision and actions needed from 2019-2023 et 2024-2028 to develop sustainable mobility. This transition to sustainable mobility is quantified by a goal to triple the modal share of cycling from 2020-2024 - from 3% to 9%. Overall, the NECP makes a strong reference to the country's cycling policy, through its National cycling strategy ("Plan vélo et mobilités actives") for which €350 million will be allocated, and through the recently adopted Mobility Law ("Loi d'orientation des mobilités"). Numerous concrete measures are evoked to triple the modal share by 2030.

Inclusion of a defined budget for cycling more than doubled. In the draft NECP, only France, Italy, and Slovakia included defined budgets for cycling. In the final NECPs, seven countries - Austria, Denmark, Finland, France, Italy, Ireland, and Sweden - all included defined cycling budgets. Two regions in Belgium - Flanders and Wallonia - also included defined budgets for cycling.

Portugal's final score is more than 5x higher than in the draft NECP. Portugal increased its score by +5.5 points, showing the Member State's dedication to radically improving cycling conditions by 2030. Six new measures were added: 1) a modal shift goal, 2) references to a SUMP, 3) a National Cycling Strategy, 4) building cycling infrastructure, 5) awareness-raising/promotion of cycling, and 6) fiscal incentives. Portugal will fund its ambition to increase the modal share of bicycles at the state and city levels through the State Budget and Community Funds (PO SEUR, Regional PO). The added reference both to the National Strategy for Active Mobility 2020-2030 and the Portugal Cycling 2030 Program, deepens Portugal's commitment to cycling. The development of an action plan focused on pedestrians and cyclists is also mentioned, as well as plans to increase the length of cycle paths, increase incentives for active mobility, create a network of active mobility furniture, and develop integrated marketing and communication efforts.

Denmark added five new indicators. Five measures were added: 1) reference to cycling or active/soft mobility, 2) public investments and funding, 3) defined budget for cycling, 4) reference to a SUMP, 5) building cycling infrastructure. The final NECP prioritizes cycling to develop sustainable mobility:





allocating 50 million DKK in 2020 (~6.7 million EUR) to fund half the cost of municipal bicycling projects. With local contributions, Denmark will commit a total of 100 million DKK (~13.4 million EUR) to cycling. Additionally, the final NECP added references to a "green mobility plan" (29) and an infrastructure agreement to invest in cycling.

The number of references to a Sustainable Mobility Plan/ Mobility Management doubled. From seven references by Slovakia, Romania, Malta, Lithuania, Italy, Greece, Croatia, in the draft NECPs, 16 Member States - Spain, Slovakia, Romania, Portugal, Netherlands, Malta, Luxembourg, Lithuania, Italy, Greece, France, Denmark, Cyprus, Croatia, Belgium, and Austria - include references to a SUMP/Sustainable Mobility Management.

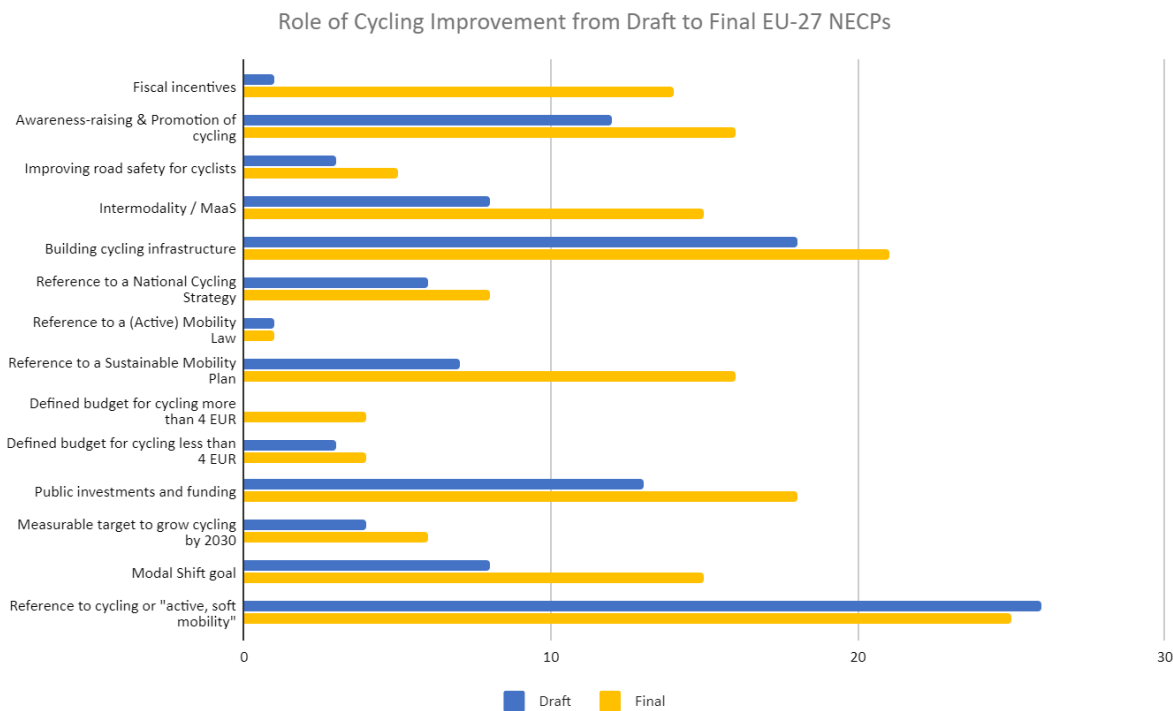
Slovenia quadrupled its score (1-4.5). Slovenia added five new measures to its final NECP: 1) modal shift goal, 2) reference to a National Cycling Strategy, 3) improve road safety for cyclists, 4) awareness-raising/promotion, and 5) a reference to fiscal incentives.

*For a country-by-country analysis from draft to final NECP please refer to Annex B.*

### 6.5 Improvements per indicator

This graph shows the improvements from draft to final NECP per indicator. For a table scoring the improvement of cycling's role in the NECP by indicator please refer to Annex C.

Figure 6: Improvements per Indicator





## 7. Overall ECF assessment

The 27 Member States' attention to cycling has improved since the drafts were released. Initially, the NECP drafts scored a 3/10, but because of the withdrawal of the United Kingdom from the European Union, the draft score is now 2.7/10. Now, the average score of the final NECPs is: 4.35/10. Nonetheless, cycling measures still only receive moderate attention in the final National Energy and Climate Plans. In the drafts, only three Member States scored excellent or good against the 13 cycling indicators, now seven Member States– France, Austria, Belgium, Italy, Cyprus, Portugal, and Luxembourg– score excellent or good. Indeed, an additional six countries now score a moderate result or higher, 17 countries in total. Disappointingly, from the 17 countries that scored either an unsatisfactory (8) or an insufficient result (9) in the draft, 11 countries still failed to reach even moderate results. Two countries did not even mention cycling once: Bulgaria and Hungary! Bulgaria is also one of the two countries (the other one being Slovakia) whose overall score deteriorated.

The average score of the 27/27 final NECPs is: 4.35/10

Most Member States have improved by at least one point and some countries, such as Portugal and Denmark, have radically increased their scores. Despite these positive changes, however, the result is clear: cycling has yet to be recognized as an important tool to decarbonize road transport. Despite being a zero-emission mode of transport, a significant portion of Member States still failed to incorporate pro-cycling measures into their final NECPs. To achieve zero-carbon emissions across Europe by 2050, European countries must support and fund cycling.

### Discrepancy between NECPs and national policy frameworks

ECF also would like to point out that in certain cases cycling is given higher attention in other national policy frameworks, including on climate action, than in the NECPs. Further analysis is needed to identify the reasons for this discrepancy.

Germany will invest 1.4 billion Euro into cycling from federal funds between 2020 – 2023, including 900 million new federal funding earmarked by its Energy and Climate Fund. Hence cycling is acknowledged by relevant German authorities as a tool to reduce GHG emissions within the transport sector, yet no such reference to national investments into cycling has been made in its NECPs. The NECP also does not refer to the National Cycling Strategy (Nationaler Radverkehrsplan) that Germany has had in place since 2002. Currently it is elaborating its 3<sup>rd</sup> edition.

The Netherlands, the European country with the highest cycling mode share by far, has boosted the attention paid to cycling in its final NECP compared to its draft. However, investments in cycling, such as announced through the National Climate Accord in 2019 (an additional 75 million Euro for bicycle parking at public transport hubs) were not mentioned in the NECP.

Hungary has a detailed National Cycling Programme in place and aligns its cycling policies very closely with the EU's Multi-Annual Financial Framework. The country was identified in the past by ECF as one of the best examples in unlocking EU funds for cycling projects. Yet the Hungarian NECP does not make any reference to cycling at all.



## 8. Call to Action

The final NECPs have been released, but there is still time to add measures for cycling. The targets set in these NECPs reflect current emission reduction policies that will only reduce GHG emissions to 40% at EU-level by 2030. But, in 2020 the European Commission plans to increase the GHG emission reductions target for 2030 to 50-55% compared to 1990 levels. In the near future, Member States will need to rework their NECPs to fit this new emission reduction objective.

ECF calls upon all Member States to 1) fully integrate concrete cycling measures during the NECP implementation phase and 2) include these additional cycling measures in the 2022 progress reports. To make a climate-neutral Europe by 2050 a reality, we need greater cycling ambition.



## 9. For more information

Climate change mitigation effects of active travel report (2020): <https://assets.researchsquare.com/files/rs-39219/v1/5f66111b-a279-43e1-9c83-cf3aa0393afe.pdf>

Declaration of Luxembourg (2015): <http://www.eu2015lu.eu/en/actualites/communiqués/2015/10/07-info-transports-declaration-velo/07-Info-Transport-Declaration-of-Luxembourg-on-Cycling-as-a-climate-friendly-Transport-Mode---2015-10-06.pdf>

European Commission's website, National Energy and Climate Plans:  
[https://ec.europa.eu/energy/topics/energy-strategy/national-energy-climate-plans\\_en](https://ec.europa.eu/energy/topics/energy-strategy/national-energy-climate-plans_en)

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## Annex A

Figure 8: The role of cycling in the NECPs through 13 indicators

	Reference to cycling or "active, soft mobility" (0.5)	Modal Shift goal (1)	Measurable target to grow cycling (1)	Public investments and funding (1)	Less than 4 EUR per capita (0.5)	More than 4 EUR per capita (1)	SUMP/ Mobility Management (1)	(Active) Mobility Law (1)	National Cycling Strategy (1)	Cycling infrastructure (0.5)	Intermodality / MaaS (0.5)	Improving road safety (0.5)	Promotion of cycling (0.5)	Fiscal incentive (0.5)	Score
Austria	x	x	x	x		x	x		x	x	x		x	x	8.5
Belgium	x	x	x	x		x	x			x	x	x	x	x	7.5
Bulgaria											x				0.5
Croatia	x			x			x			x	x	x	x		4.5
Cyprus	x	x	x	x			x			x			x	x	6
Czechia	x								x						1.5
Denmark	x			x	x		x			x					3.5
Estonia	x	x													1.5
Finland	x	x		x		x			x	x			x		5.5
France	x	x	x	x	x		x	x	x	x	x	x	x	x	9.5
Germany	x	x		x						x	x	x		x	4.5
Greece	x	x					x			x					3
Hungary															0
Ireland	x	x		x		x				x	x		x	x	5.5
Italy	x	x		x	x		x			x	x		x	x	6
Latvia	x	x								x	x		x		3
Lithuania	x			x			x			x	x		x	x	4.5
Luxembourg	x	x	x	x			x			x	x			x	6
Malta	x			x			x		x	x	x	x		x	5.5
Netherlands	x		x				x			x	x			x	4
Poland	x									x	x			x	2
Portugal	x	x		x			x		x	x			x	x	6
Romania	x			x			x			x			x		3.5
Slovakia	x			x			x		x				x		4
Slovenia	x	x		x					x	x		x	x	x	5.5
Spain	x	x					x				x		x		3.5
Sweden	x			x	x					x					2.5
≈ EU-27															4.35

## Annex B

Figure 9: Detailed analysis of changes from draft to final NECPs

Country	Measures Changed	Score
Austria	<p>Austria added three new measures to their final NECP: 1) a defined budget for cycling, 2) a reference to sustainable mobility management, and 3) a reference to Intermodality/MaaS.</p> <p>To achieve their decarbonization objectives, Austria will have to invest approximately EUR 2.2 billion between 2020-2030 to develop cycling. Austria's NECP also made gains by mentioning an intermodal funding programme: Intermodal Interfaces for Cycling, walking and digitalisation of the transport system. Austria will also continue to create 'multimodal hubs', connecting</p>	<p>+1.5</p> <p>The cycling strategy was already fully integrated into Austria's draft NECP, with clearly defined goals. Now, Austria's commitment to cycling is even stronger.</p>



	active mobility to other forms of transportation.	
Belgium	<p>We calculated Belgium's score by averaging the three regions; the new measures added, therefore, differ. We have chosen to represent five new examples of added measures to the final NECP: 1) public investments and funding, 2) defined budget for funding, 3) reference to a SUMP, 4) improving road safety, and 5) fiscal incentives.</p> <p>Both Wallonia and Flanders have committed to investing in cycling. Wallonia promised 20 euros/resident/ year. Flanders promised a minimum investment of EUR 150 million in 2019, followed by a goal of EUR 300 million for cycling infrastructure by 2023. All three regions also mentioned a SUMP. To support sustainable mobility on a federal level, Belgium added a fiscal incentive that allows yearly train subscriptions to be combined with other modes of transport for a certain amount of days/year. This fiscal incentive could include tax exemptions for bicycle allowance.</p>	<p>+4</p> <p>The cycling strategy is fully integrated to the NECP, with clearly defined goals. Some regions in Belgium, however, still lack clear financial commitments.</p>
Bulgaria	<p>Bulgaria added one new measure to their final NECP: a reference to intermodality/MAAS. But, they also removed two measures: a reference to cycling, or at least to "soft, active mobility" and awareness-raising/ promotion of cycling.</p> <p>To "promote sustainable urban mobility" (99), Bulgaria committed to developing intermodal transport and constructing intermodal terminals. The development of a "sustainable" and intermodal TEN-T network is also mentioned (291).</p>	<p>-0.5</p> <p>Bulgaria's focus remains on low-emission motor vehicles and public transport rather than active mobility. Cycling is not mentioned in the NECP and is not explicitly referenced in the intermodal additions.</p>
Croatia	No updates.	+0
Cyprus	Cyprus added two new measures to their final NECP: 1) a reference to a Sustainable Mobility Plan and 2) a fiscal incentive.	+1.5



	In the final NECP, Cyprus clarified: policy and measure details for a modal shift can be found in the SUMP. Additionally, the NECP mentions financial measures to "increase the use of bicycles and public transportation".	The cycling strategy is fully integrated to the NECP, with clearly defined goals. Financial measures are evoked, but the final NECP still contains no specific amount of spending for cycling.
Czechia	No updates.	+0
Denmark	<p>Denmark's commitment to cycling in the final NECP vastly improved from its draft. Five measures were added: 1) reference to cycling or active/soft mobility, 2) public investments and funding, 3) defined budget for cycling, 4) reference to a SUMP, 5) reference to building cycling infrastructure.</p> <p>The final NECP prioritizes cycling to develop sustainable mobility, allocating 50 million DKK in 2020 to fund half the cost of municipal bicycling projects. In total, Denmark will commit 100 million DKK to cycling. Additionally, the NECP references a "green mobility plan" (29) and an infrastructure agreement that will invest in cycling.</p>	<p>+4</p> <p>The support for cycling in Denmark's NECP has much improved, and the clear financial investment in cycling shows Denmark's commitment to active mobility. However, at 1.15 EUR per capita, there is still much room to improve Denmark's fiscal commitment to cycling.</p>
Estonia	<p>Estonia added one new measure to its final NECP: a modal shift goal. But, it also removed one measure: a reference to building cycling infrastructure.</p> <p>Estonia committed to reducing "the share of use of cars in cities by improving the opportunities for walking, cycling and use of public transport" (158). Increasing short-term bicycle rental is mentioned as essential to shift the modal share.</p>	<p>+0.5</p> <p>Although Estonia now has a modal shift goal, cycling is still only partly integrated in the NECP. There are still no financial or other measurable goals by 2030.</p>
Finland	Finland added two new measures to its final NECP: 1) modal shift goal, 2) a defined budget for cycling. But, Finland also removed one measure: a reference to intermodality/Maas.	<p>+2</p> <p>The cycling strategy is fully integrated to the NECP, with specific financial commitments. However, there is an absence of measurable cycling targets by 2030 and of active mobility strategies.</p>



	<p>Finland committed to reduce the use of private vehicles and create a greater modal share for sustainable mobility, including bicycles. To reach this goal, from 2020–2022, Finland will reserve EUR 41 million to plan and promote active mobility. Additionally, Finland will invest EUR 10 million in walking and cycling infrastructure.</p>	
France	<p>France added two new measures to its final NECP: 1) a measurable target to grow cycling by 2030 and 2) reference to a sustainable mobility plan.</p> <p>The final NECP mentions the Clean Mobility Development Strategy (SDMP) presents the vision and actions needed from 2019-2028 to develop sustainable mobility. This transition is quantified by a goal to triple the modal share of cycling from 2020-2024 - from 3% to 9%.</p>	<p>+2</p> <p>By adding two indicators, France's NECP is now the highest scoring out of all the Member States. The cycling strategy is fully integrated to the NECP, with specific financial commitments and measurable targets. Looking forward, ECF recommends focusing on increasing the amount of EUR/capita spent on cycling, otherwise the objective of tripling cycling by 2024 is likely to be missed.</p>
Germany	<p>Germany added three new measures to its final NECP: 1) Intermodality / Maas, 2) improving road safety for cyclists, and 3) fiscal incentives.</p> <p>Germany looks to digitization to improve their intermodality, seeing promise in app-based operating concepts for sharing cars and bicycles.</p> <p>Additionally, Germany mentions many improvements to cycling safety in their NECP including, higher fines for motor vehicles that endanger cyclists and the introduction of new traffic signs. Finally, Germany added several fiscal incentives including, the extension of a tax exemption to rent company bicycles or e-bicycles for employees.</p>	<p>+1.5</p> <p>Cycling is integrated to the final NECP, with many pro-cycling measures defined; however there is still no mention of a defined budget or measurable goals for cycling. And, the reference to the National Cycling Plan 2020 has been removed.</p>
Greece	<p>Greece added one new measure to its final NECP: a modal shift goal.</p>	<p>+1</p>





	<p>Greece aims to reduce the use of private vehicles and shift a greater modal share to sustainable mobility, including bicycles. To achieve this goal, Greece has committed to promoting cycling by improving bicycle infrastructure.</p>	<p>Cycling is partly integrated to the final NECP, with some concrete measures defined. There is, however, still no indication concerning spending for cycling, nor any measurable goal for 2030.</p>
Hungary	<p>Hungary did not include any new measures to support cycling in their final NECP.</p>	<p>+0</p> <p>Cycling is totally absent from the NECP. The closest mention is a general commitment to support sustainable urban mobility.</p>
Ireland	<p>Ireland added one new measure to its final NECP: 1) modal shift goal, 2) defined budget for cycling more than 4 EUR per capita, 3) awareness-raising &amp; promotion of cycling, 4) fiscal incentives (0.5), 5) reference to intermodality / MaaS.</p> <p>Ireland aims to improve cycling by investing over 110 million in capital funding in cycling and walking infrastructure in the Greater Dublin Area, Galway, Limerick, Cork and Waterford from 2018-2021. An additional 135 million investment in Sustainable Urban Transport projects will also support cycling. Finally, to encourage a modal shift towards sustainable transport, Ireland has committed 2.5 million each year per for behavioural change programmes "including Green Schools, Cycle Right and Smarter Travel Workplace and Campus programmes."</p>	<p>+3.5</p> <p>The support for cycling in Ireland's NECP has much improved, and the defined financial investment in cycling shows Ireland's commitment to active mobility. However, it misses a measurable cycling target to streamline Ireland's cycling growth.</p>
Italy	<p>Italy added one new measure to its final NECP: fiscal incentives.</p> <p>Italy committed to establishing a 'Mobility Voucher' for scrapping motor vehicles: €1,500 per passenger vehicle and €500 per motorcycle. This voucher can buy tickets for public transport or bicycles, including e-</p>	<p>+0.5</p> <p>The cycling strategy is fully integrated to the final NECP, with specific actions defined and spending on cycling specified. However, absence of specific goals by 2030 still remains.</p>





	bicycles for the following three years. The final NECP also included the 'Experimental Mobility Voucher Programme' that allocates EUR 255 M from 2019-2024.	
Latvia	<p>Latvia added three new measures to its final NECP: 1) a modal shift goal, 2) a reference to intermodality/Maas and 3) awareness raising/promotion of cycling.</p> <p>Latvia committed to reducing the use of private vehicles to shift a greater modal share to sustainable mobility, including "promoting the development of bicycle traffic" (129). Key to this modal shift is creating multimodal public transport points to encourage intermodality.</p>	<p>+2</p> <p>Latvia's final NECP has improved its support for cycling since the draft. There is, however, still no mention of an NCS, nor specific spending on cycling or clearly defined goals.</p>
Lithuania	<p>Lithuania added three new measures to its final NECP: 1) public investments and funding, 2) building cycling infrastructure and 3) fiscal incentives.</p> <p>Lithuania allocated EUR 2.2 billion from 2021-2027 to the implementation of sustainable mobility plans, including measures to promote cycling. Lithuania also committed to building cycling infrastructure and to create financial incentives to promote cycling.</p>	<p>+2</p> <p>Lithuania's final NECP is much improved from the draft. However, although Lithuania defined investments in sustainable mobility, the final NECP still did not include a defined budget for cycling.</p>
Luxembourg	<p>Luxembourg added four new measures to its final NECP: 1) measurable target to grow cycling, 2) reference to a SUMP, 3) reference to intermodality/Maas, and 4) fiscal incentives.</p> <p>Luxembourg hopes the modal share of cycling reaches 4% by 2030. Their sustainable mobility plan "MoDu 2.0" will help achieve this goal, as will the development of new incentives that favour Maas. Finally, the fiscal incentives "Clever fueren" will encourage the purchase of sustainable vehicles and bicycles.</p>	<p>+3</p> <p>Cycling is fully integrated to the final NECP, with many pro-cycling measures defined; however there is still no mention of a defined budget for cycling or a National Cycling Strategy.</p>
Malta	Malta added one new measure to its final NECP: fiscal Incentives.	<p>+0.5</p> <p>Cycling is integrated to the NECP via</p>



	<p>The final NECP included a grant to support cycling: residents will receive a full refund of the VAT after purchasing bicycles and pedelec bicycles.</p>	<p>the Transport Plan, with some pro-cycling measures defined; however there are no mention of goals by 2030. Additionally, the only public spending on cycling specified is the fiscal incentive added in the final NECP.</p>
Netherlands	<p>The Netherlands final NECP has improved drastically since the draft. Three new measures have been added: 1) reference to a SUMP, 2) building cycling infrastructure and 3) fiscal incentives.</p> <p>The Netherlands' NECP referenced collaborations between central and regional governments to develop sustainable mobility plans. Further incentives for cyclists in the NECP are the Netherlands' commitment to developing cycling infrastructure and various fiscal incentives such as increasing bicycle parking facilities at train stations through co-financing.</p>	<p>+2</p> <p>Cycling is far more integrated to the final NECP than the draft, with some pro-cycling measures and goals defined.</p> <p>There is, however, still no defined public investments to support cycling other than fiscal incentives.</p>
Poland	<p>Poland added two new measures to its final NECP: 1) a reference to intermodal/Maas and 2) awareness-raising/promotion of cycling.</p> <p>Poland committed to promote active mobility, to build intermodal nodes and to develop a sustainable transport network. Cycling and active mobility, however, are not explicitly mentioned in relation to developing an intermodal network.</p>	<p>+1</p> <p>Cycling is referenced in the draft NECP, and some pro-cycling measures are mentioned. There is, however, no mention of targets and spending.</p>
Portugal	<p>Portugal is the most improved member state from draft to final NECP. Six new measures were added: 1) a modal shift goal, 2) references to a SUMP, 3) references to a National Cycling Strategy, 4) building cycling infrastructure, 5) awareness-raising/promotion of cycling, 6) fiscal incentives.</p> <p>Portugal will fund its ambition to increase the modal share of bicycles at the state and city levels through the State Budget and</p>	<p>+5.5</p> <p>Portugal has done a fantastic job of integrating the cycling strategy into the final NECP, with specific actions defined. Spending on cycling and an absence of specific targets by 2030 still remains.</p>



	Community Funds (PO SEUR, Regional PO). The added reference both to the National Strategy for Active Mobility 2020-2030 and the Portugal Cycling 2030 Program, deepens Portugal's commitment to cycling. The development of an action plan focused on pedestrians and cyclists is also mentioned, as well as plans to increase the length of cycle paths, increase incentives for active mobility, create a network of active mobility furniture, and develop integrated marketing and communication efforts.	
Romania	Romania added two new measures to its final NECP: 1) public investments and funding, 2) awareness-raising/ promotion. Romania committed to investments in infrastructure for bicycles and pedestrians and to promoting alternative methods of mobility, including cycling.	+1.5  Cycling is partly integrated into the final NECP via the SUMP. There are, however, no mention of goals by 2030 or spending on cycling specified.
Slovakia	Slovakia added no new measures to their final NECP. But, they removed two measures: 1) reference to cycling infrastructure, and 2) a defined budget for cycling.	-1.5  Cycling is integrated to the NECP via the National Cycling Strategy. There is no mention of goals by 2030, no spending on cycling specified.
Slovenia	Slovenia added six new measures to its final NECP: 1) modal shift goal, 2) public funding/investments, 3) reference to a National Cycling Strategy, 4) improve road safety for cyclists, 5) awareness-raising/ promotion and 6) fiscal incentives.  Slovenia committed to reducing the modal share of cars and increasing sustainable mobility, including cycling; preparing a National Cycling Strategy (in 2022); promoting active mobility; creating better safety conditions for walking and cycling; and developing fiscal incentives for non-motorized transport.	+4.5  Cycling is partly integrated to the NECP, with mentions of specific measures. There is, however, no mention of public spending or a defined budget for cycling.
Spain	Spain added two new measures to its final NECP: 1) reference to a SUMP, 2) reference to intermodality/Maas. To improve air quality and drive the modal shift, Spain will promote Sustainable Urban Mobility Plan	+1.5



	measures and utilize Maas.	Cycling is partly integrated to the final NECP, with concrete pro-cycling measures mentioned. There is, however, no mention of goals by 2030, nor spending on cycling specified.
Sweden	<p>Sweden added one new measure to its final NECP: a defined budget for cycling.</p> <p>Cycling funding is integrated both into the Climate initiative and the Urban Environment Agreement. In the former the SEK 1.5 billion (~143 million EUR) available can help fund " cycle paths and cycling infrastructure" (44). In the latter the grant of SEK 1 billion (~96 million EUR) a year for 2018–2029 co-funds municipalities and county councils with up to 50% Government funding for infrastructure for public transport and cycling.</p>	<p>+1</p> <p>Cycling is partly integrated to the NECP, with some defined measures. Increased specificity for cycling budget and measurable targets would solidify support for cycling in Sweden.</p>

## Annex C

Figure 10: Improvement in cycling indicators from draft to final NECPs

Indicator	Draft	Final
Reference to cycling or "active, soft mobility"	26	25
Modal shift goal	8	15
Measurable target to grow cycling by 2030 (or another year)	4	6
Public investments and funding	13	18
Defined budget for cycling:		
Less than 4 EUR annually per capita	3	4
More than 4 EUR annually per capita	0	4
Reference to a SUMP/ Mobility Management	7	16
Reference to a (Active) Mobility Law	1	1
Reference to a National Cycling Strategy	6	8



Building, developing cycling infrastructures	18	21
Enhancing inter-modality	8	15
Improving road safety for cyclists	3	5
Awareness-raising and promotion of cycling	12	16
Fiscal incentives to support cycling	1	14

