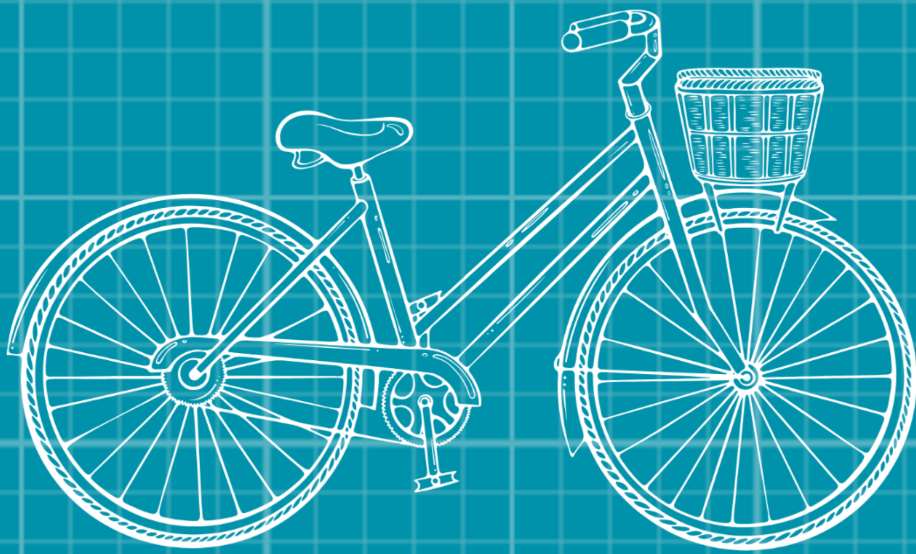
EUROPEAN CYCLISTS' FEDERATION



A Glass Half-Full

Growing significance for cycling policies in final **National Energy and Climate Plans**

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Disclaimer

ECF stresses that this report is 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 on the extent to which planned interventions announced in draft NECPs are likely to be implemented in future years.

For a more general analysis of national cycling strategies please consult ECF's "The state of national cycling strategies in Europe (2024)" report that can be assessed here: [The-State-of-National-Cycling-Strategies-in-Europe-2024_ECF_final 241212.pdf]

1. Introduction

The purpose of this paper is to analyse the extent to which cycling has been incorporated by the 27 EU Member States in their final National Energy and Climate Plans (NECPs). These plans are strategic 2030 reform blueprints designed to ensure that all Member States individually achieve their Greenhouse Gas (GHG) emission reduction targets enabling the EU collectively to reach a 55% reduction by 2030 compared to 1990 levels.

The original deadline for Member States to submit their NECPs to the Commission was 30 June 2024. Many countries missed this deadline – Belgium and Poland are yet to submit their final NECPs, for example. In its assessment of the final NECPs, the European Commission concluded that even with full implementation of all EU and national policies, a two percentage point gap would remain in the emission reduction target for the sectors covered under the Effort Sharing Regulation (38% instead of 40%). On transport, it concluded:

"For the transport sector, crucial elements include electrification and infrastructure deployment, demand management, an increase in the use of public and shared transport and active/non-motorised mobility."[1]

To make a climate-neutral Europe by 2050 a reality and bring transport closer to its 90% emissions reduction target by 2050, we need greater cycling ambition, as confirmed 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, 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."

Cycling is increasingly establishing a foothold in energy and climate related policies, most prominently being through the 2024 recast of the **Energy Performance of Buildings Directive,** which sets bicycle parking standards for various types of residential and non-residential buildings. Another example is the **Social Climate Fund,** which recommends cycling measures as a way of addressing transport poverty.

It is time to extend cycling policies to all relevant energy and climate policies.

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[1] European Commission: EU wide assessment of the final updated national energy and climate plans Delivering the Union's 2030 energy and climate objectives. COM (2025) 274 final [97168210-2a5c-4d1a-9ed8-6a063e011537_en]

2. Executive summary

The final National Energy and Climate Plans reveal that EU Member States are increasingly recognising cycling's role in reducing transport sector GHG emissions, though progress remains gradual. Using 13 indicators with a maximum score of 10 points each, the average score of the final NECPs submitted to the European Commission in 2024/25 reached 5.4 points – the first time the average score exceeded the 5.0 threshold.

This result represents a substantial increase from the 2023/24 draft NECPs, which achieved an average score of 4.6/10. The improvement is primarily from dramatically enhanced scores in the final NECPs of Austria (which did not submit a draft), Latvia, and Slovenia. Other countries showed smaller gains.

However, significant discrepancies persist between Member States. While four countries submitted final NECPs scoring 'excellent' for their cycling indicators (Austria, France, Slovenia and Italy), many others still give cycling minimal attention, including Denmark, Estonia, Finland and Sweden. The low scores of Scandinavian countries are particularly striking, with Sweden ranking lowest (0.5/10). France achieves the highest score (9/10).

The NECPs submitted to the European Commission are valid until 2030, but the Commission will conduct biennial evaluations to assess whether Member States are delivering their planned reforms. This creates ongoing opportunities to improve cycling measures. ECF will continue advocating for every European country to develop and implement meaningful national cycling strategies backed by investment plans on specific targets. Member States can draw on numerous EU funding sources, particularly cohesion funds and the future Social Climate Fund – opportunities that should not be overlooked.

While the EU has not established specific 2030 GHG emission targets for transport, the sector must contribute to overall reductions under the Effort Sharing Regulation. Despite ongoing vehicle fleet electrification, transport emissions have not decreased. The sector requires more innovation and aggressive modal shift policies. Cycling can play a crucial role in transport decarbonisation: when an average person cycles one additional trip daily instead of driving for 200 days a year, their mobility-related lifecycle CO2 emissions decrease by about 0.5 tonnes per year.

ECF therefore urges all Member States to prioritise cycling within their national climate mitigation and energy efficiency strategies.

3. Overall EU climate and energy policy context

3.1 Context

Making Europe the world's first climate-neutral continent by 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. Building on this pathway towards climate neutrality, the Commission presented its assessment for a 2040 climate target in February 2024, recommending a 90% reduction in net GHG emissions by 2040 compared to 1990 levels.

Under the **Effort-Sharing Regulation** (ESR), GHG emissions from covered sectors – including transport (excluding aviation and maritime), buildings and agriculture – must be reduced by 40% in 2030 compared to 2005 levels. While different emission reduction targets apply to Member States, these targets are cross-sector targets rather than sector-specific. In other words, any under-performance in the transport sector could, for example, balanced out by an over-performing buildings sector.

These targets are complemented with improving **energy efficiency** improvements. A recent binding EU-level target requires improving energy efficiency by 11.7% by 2030, with Member States required to achieve annual savings of averaging 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 resulting from carbon taxes on fossil fuels in the mobility and building sectors (the so-called ETS2). From 2026 to 2032, the fund will provide over €86 billion to help the most vulnerable citizens and small businesses with managing the green transition. Cycling has been identified as a potential beneficiary for investments including in cycling infrastructure, bike-sharing, leasing and purchase-premiums for (electric) bicycles.[2] EU-Member States are currently drafting their national social climate plans.

Cycling has also been incorporated into the **Energy Performance of Buildings Directive**. The 2024 recast now requires minimum norms for bicycle parking in residential and non-residential buildings. Member States must transpose the Directive into national law by May 2026.[3]

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[2] A new European source of funding for cycling: The EU Social Climate Fund: https://www.ecf.com/en/news/a-new-european-source-of-funding-for-cycling-the-eu-social-climate-fund/

[3] ECF Summary of Impact of the EPBD on European Bicycle Parking Requirements, 2024. https://www.ecf.com/media/resources/2024/ECF_EPBD_Summary_Document_May_2024_Final.pdf

3.2 National Energy and Climate Plans

To meet the EU's energy and climate targets, each Member State must establish a 10-year integrated National Energy and Climate Plan (NECP) covering 2021 to 2030. These plans outline how they intend to address five areas:

- decarbonisation
- energy efficiency
- energy security
- internal energy market
- research, innovation and competitiveness

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.

All Member States had to submit their first NECPs by 2019/20. However, new EU legislation setting stricter targets required countries to re-write and submit their draft plans by 30 June 2023, with final NECPs due by 30 June 2024. As of 30 September 2025, Belgium and Poland have not submitted their final plans.

3.3 Trends in GHG emissions in the transport sector

Data published by the European Environmental Agency (EEA) for 2022 indicate that total net EU GHG emissions, including international aviation, decreased by 31% compared to 1990 levels. Current GHG projections suggest that net emissions will reach a 49% decrease by 2030 compared to 1990 levels, falling short of the 55% reduction target.[4]

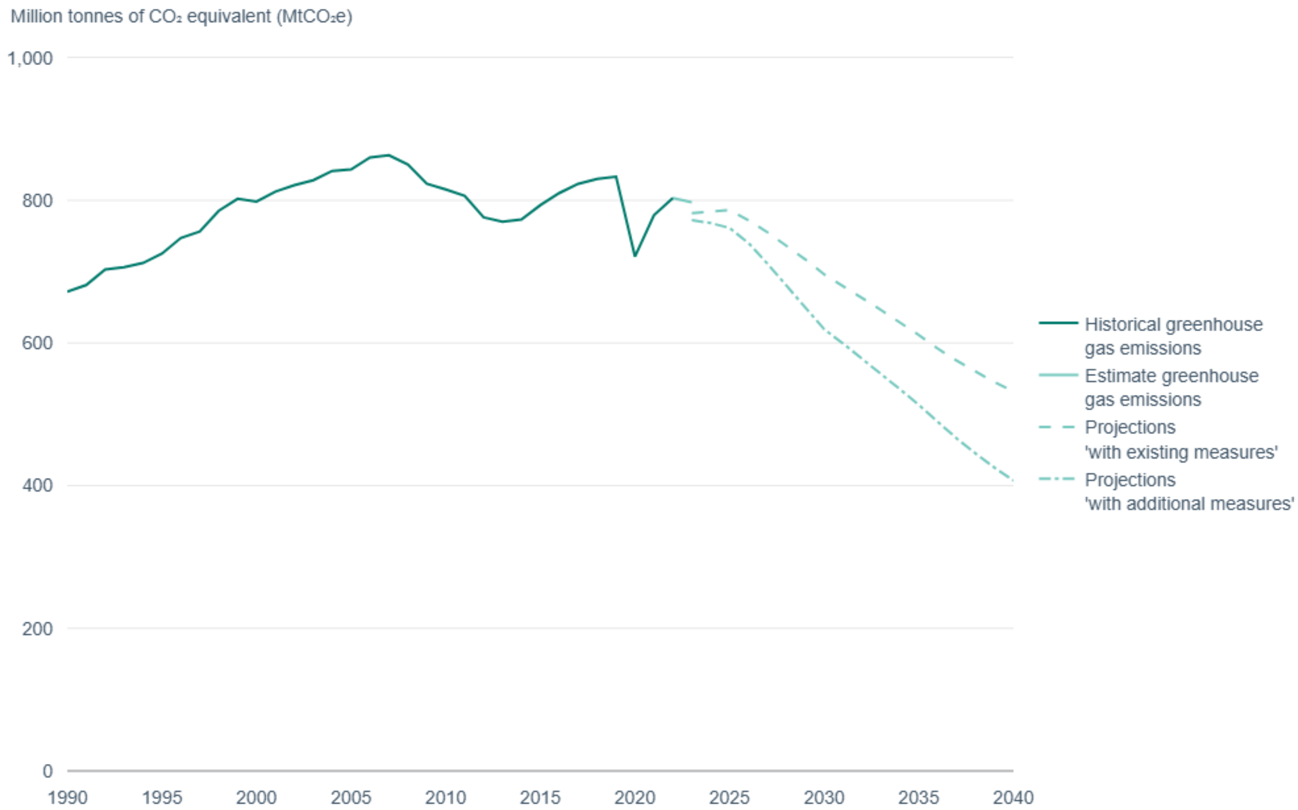
Overall progress stems largely from decreasing emissions in the energy supply, industry, and buildings sectors, while transport and agriculture emissions have seen only marginal changes since 2005. Excluding international aviation, transport now accounts for 23% of the EU's total GHG emissions, with approximately 75% of sectoral emissions coming from road transport.

[4] https://www.eea.europa.eu/en/analysis/indicators/total-greenhouse-gas-emission-trends

The EEA summarises the transport decarbonisation challenge as follows:

"The transport sector is one of the largest sources of greenhouse gas emissions in the European Union. The sector has shown little progress in the reduction of emissions in recent decades. Despite efforts to reduce emissions from transport, such as increasing the deployment of electric vehicles, emissions have not significantly decreased since 2005. Member States project that domestic transport emissions will only fall below their 1990 levels in 2032."[5]

Figure 1. Greenhouse gas emissions from transport in Europe



More impactful modal shift policies – encouraging a shift from individual motorised transportation to public transport and active mobility – must be part of the policy mix to reduce transport GHG emissions and improve energy efficiency.

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[5] https://www.eea.europa.eu/en/analysis/indicators/greenhouse-gas-emissions-from-transport

3.4 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 across seven European cities (Antwerp, Barcelona, London, Orebro, Rome, Vienna and Zurich). Researchers found that increased cycling or walking correlated with lower mobility-related lifecycle CO_2 emissions. Specifically, cyclists had 84% lower daily travel lifecycle CO_2 emissions than non-cyclists. The paper states that "an average person who 'shifted travel modes' from car to bike decreased life cycle CO2 emissions by 3.2 kgCO2/day."[6]

In a separate paper, the same researchers concluded that an average person cycling one additional trip daily more while driving one less trip for 200 days annually would decrease mobility-related lifecycle CO2 emissions by about 0.5 tonnes per year.[7]

This reduction is a significant portion of the annual transport carbon footprint which totalled 2.33 tonnes of CO_2 per person in 2022.[8] This shift would on average lead to a decrease of yearly transport emissions of more than 20%.

ECF compiled these two aforementioned reports as well as 17 other studies in a comprehensive literature review, examining cycling's potential to reduce emissions. 14 of these papers focus on Europe.[9]

To date, the only attempt to quantify the EU-wide CO_2 savings potential of cycling remains ECF's 2011 publication, Cycle More Often 2 Cool Down the Planet: Quantifying CO_2 Savings of Cycling.

A study limited to Germany has been published by ECF member ADFC. It envisions a "Cycling Nation Germany," where cycling achieves a 45% modal share for trips under 30 km, potentially saving up to 19 million tonnes of CO_2 annually. For context, the EU transport sector emits around 800 million tonnes of CO_2 each year.

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

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

[8] Transport & Environment, The State of European Transport, 2024.
https://transport2024.transportenvironment.org/sot/index.html

[9] ECF: Cycling's Potential to Reduce GHG Emissions - A Literature Review, 2024. ECF-paper-CO2 report 2024_short version.pdf

4. Assessing the role of cycling in the NECPs

4.1 Methodology: The 13 ECF indicators

To assess cycling's role within the NECPs, we used a set of 13 indicators totalling 10 points. These indicators remain unchanged from ECF's previous report to ensure comparability.

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 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 total score across the 13 indicators enabled us to categorise the NECPs into five groups:

- 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).

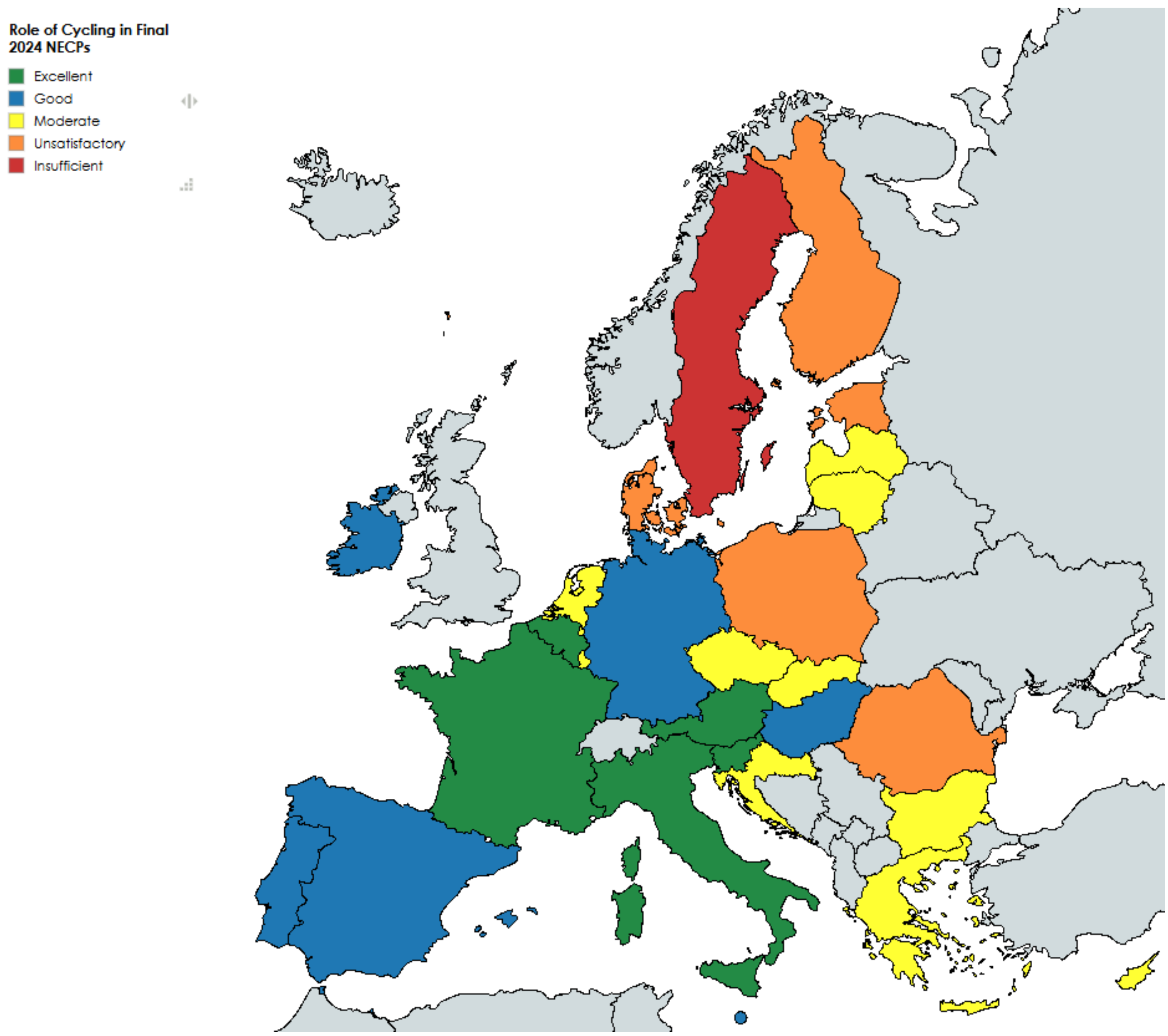
4.2 Total score and EU countries' ranking

ECF scores for the final NECPs range from 9.0 points for France and 0.5 points for Sweden.

The overall average score is **5.4/10**, representing a 0.8 point increase from the draft NECPs submitted one year earlier and marking the first time the average exceeded the 5/10 threshold. This improvement comes from several Member States making considerable advances in incorporating cycling measures, such as Slovenia (from 2 to 8/10) and Latvia (from 0 to 4.5/10). Austria's strong performance (8/10) also contributed to the higher overall result, having not submitted a draft NECP the previous year and hence not being counted then for the overall score.

The map below presents ECF's assessment of individual country scores.

Map 1: Role of Cycling in Final 2024 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 NECP. There are clear commitments to modal shift and manifold actions to achieve that shift.	Austria (8.5), *Belgium (9)*,* France (9.0), Italy (8), Slovenia (8)
GOOD (6-7.5): Cycling is clearly referenced in the NECP, thanks to numerous indications on the implementation of pro-cycling policies.	Cyprus (6.5), Germany (7), Hungary (6), Ireland (7), Malta (7.5), Portugal (6.5), Spain (7)
MODERATE (4-5.5): Cycling is clearly referenced in the NECP; the essential information regarding pro-cycling policies is provided.	Bulgaria (4.5), Croatia (4.5), Czechia (4.5), Greece (5), Latvia (4.5), Lithuania (5.5), Luxembourg (5), Netherlands (4.0), Slovakia (4.5)
UNSATISFACTORY (2-3.5): Cycling is referenced in the NECP, and some pro-cycling measures are mentioned. The margin for improvement is considerable.	Denmark (3), Estonia (3), Finland (2), *Poland (3)*,* Romania (3.5)
INSUFFICIENT (0-1.5): Very weak or complete absence of references to cycling in the NECP.	Sweden (0.5)
* Countries that have not submitted yet their final NECP. Scores from 2023 draft NECPs are taken.	

4.3 Highlights per indicator

This table highlights one exemplary good practice examples per indicator:

Table 2: Highlights per indicator

Indicator	Country	Measure
Modal shift goal	Cyprus	"The first pillar on "Distribution of Travel" aims to reduce travel by private vehicle, from currently 91 % to 82 % in 2030, to enhance sustainable means of transport, such as bus, bicycle and pedestrian traffic."
Measurable target to grow cycling	France	"A sharp increase in cycling traffic (from 5 [currently] to 19 billion km in 2030)."

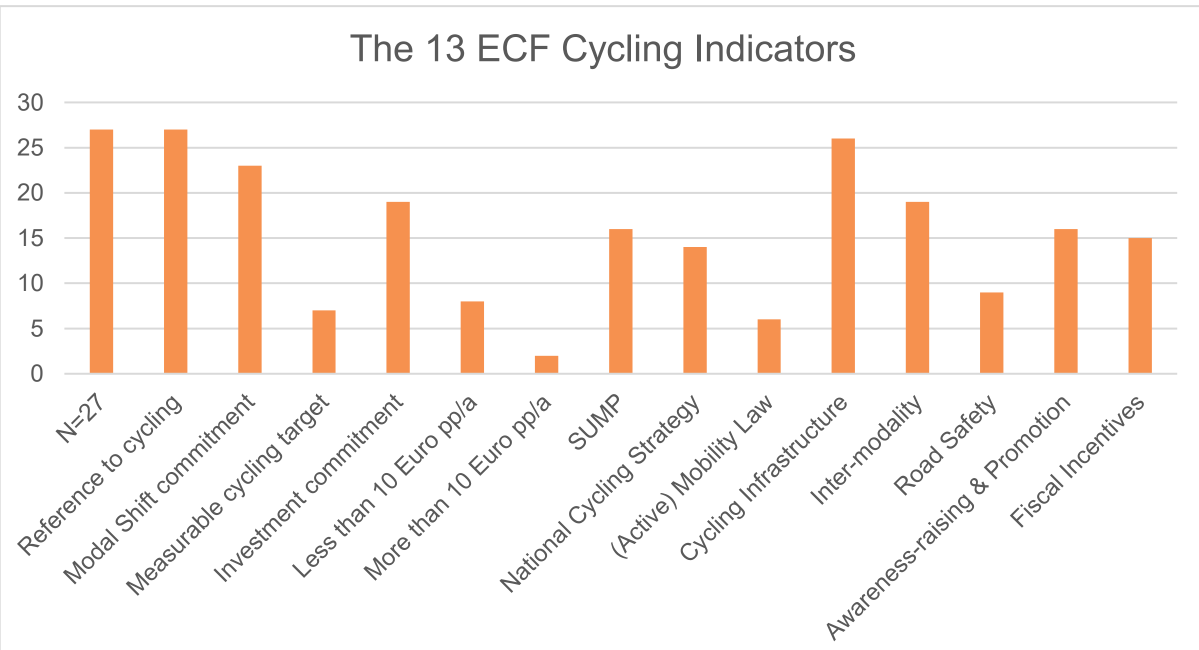
Defined budget for cycling	Slovakia	"As part of cycling development, nearly 500 km of cycling infrastructure is planned to be built for almost EUR 190 million by 2030."
Reference to a SUMP/ Mobility Management	Greece	"The overall design of sustainable transport systems by local self-government through the mandatory preparation of a SUMP by municipalities with a population of more than 30.000 inhabitants."
Reference to a National Cycling Strategy	Germany	"With the National Cycling Plan 3.0 - the cycling strategy for Germany up to 2030 - cycling has been strategically aligned with climate action goals."
Reference to a (Active) Mobility Law	Italy	"In accordance with Article 6 of Law No 2 of 11 January 2018 'Provisions for the development of cycling and the establishment of the national cycling network', municipalities with a population of more than 100,000 inhabitants (not part of metropolitan cities) and metropolitan cities shall draw up and adopt urban plans for cycling, known as 'bicibility plan'."
Building cycling infrastructures	Luxem-bourg	"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	Lithuania	"Promoting sustainable mobility: making public transport more attractive by reducing ticket prices/free, allowing faster mobility, convenient connections and benefiting from the sharing of electric vehicles, bicycle rental (2023-2030)."
Improving road safety for cyclists	Slovenia	"The introduction of areas of friendly transport in municipalities – parts of a city or settlement that do not pass transit traffic, local motor traffic is calmed and starting or targeted in the area, and the active mobility route network is dense and connected."
Awareness-raising and promotion of cycling	Hungary	- Promotional cycling campaigns (Bike to Work! campaign, Cycling across 7 borders, Cycle to Green!) - Cyclist Friendly Awards (Cyclist Friendly Municipality and Cyclist Friendly Workplace)
Introducing fiscal incentives to support cycling	Malta	"In order to further encourage active modes of transport, the existing schemes to incentivise the electrification of vehicles, introduced in 2022 using RRP funds, was also applicable for pedelecs and all Category L vehicles including e-bikes. In 2022, total grants for Category L vehicles amounted to €2,929,091 for a quantity of 1046 vehicles and a total grant value of €360,592.94 for 343 pedelecs."

4.4 How final NECPs score against the 13 ECF cycling indicators

This graph below shows how the final NECPs score against the 13 ECF cycling indicators. Key findings include:

- Every NECP referenced 'cycling' at least once.
- Encouragingly, 85% of NECPs commit to modal shift in general terms; however; only one in four sets a concrete cycling target.
- Reference to a national cycling strategy or a similar strategic framework was included in half of the NECPs, while SUMPs had a slight edge, being mentioned in 6 out of 10. Active/Urban Mobility Laws are still a minority at 1 in 5.
- Among the interventions to achieve a modal shift and increase cycle use, building cycling infrastructure proves most popular one and is included in all NECPs except Poland's. Promoting intermodality (7/10), cycle promotion/raising awareness (6/10) and fiscal incentives are also included in the majority of NECPs.
- Seven out of 10 NECPs make general commitments to invest in cycling, but only 4 out of 10 include specific investment figures. The lack of concrete investment figures in 60% of the NECPs is a clear weakness.
- References to improving road safety are included in only every third NECP.

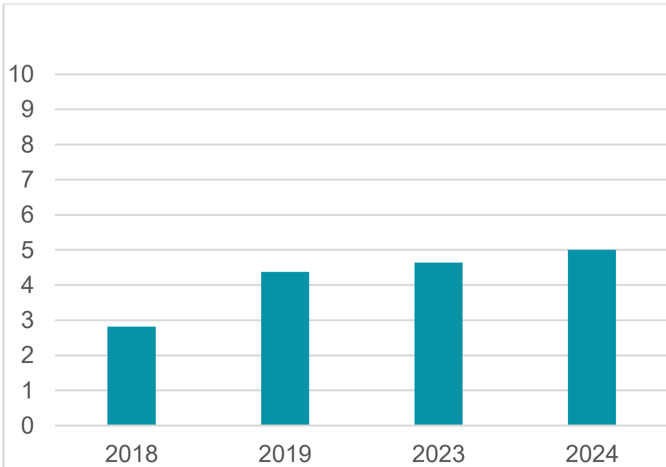
Graph 1: The 13 ECF cycling indicators



4.5 Trends in EU-27 and individual countries' performance

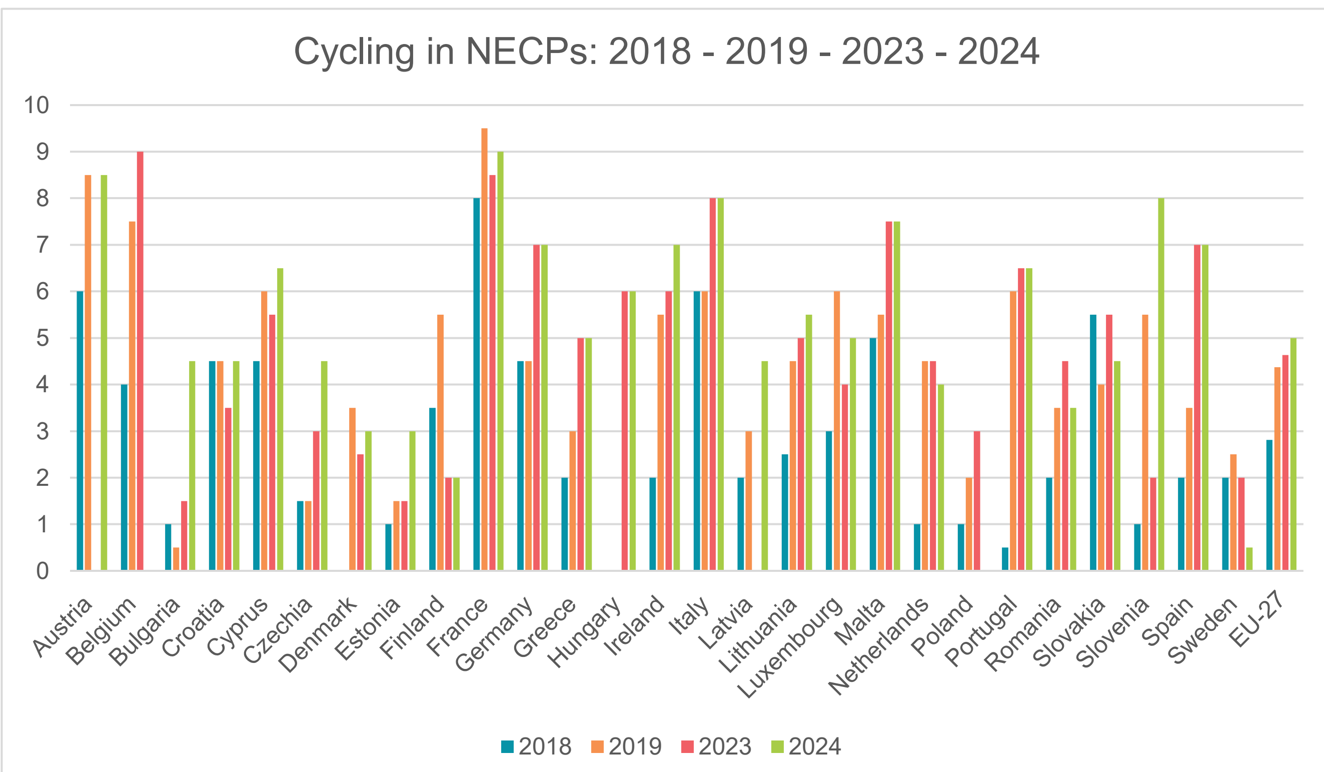
Cycling's role in the NECPs has made incremental progress over the years: starting at just 2.7/10 in 2018, it made a leap forward to achieve 4.4/10 in the 2019 final NECPs. There was only slight improvement to 4.6/10 in 2023, while the 2024 final NECPs achieve an average score of 5.4/10.

Graph 2: Cycling in NECPs during the previous four years in the EU-27



Graph 3 shows the evolution of references to cycling in the NECPs since 2018. Five countries have achieved considerable progress, while two countries have backslid.

Graph 3: Cycling in NECPs: 2018 – 2019 – 2023 – 2024



Climbers: These Member States improved the most between 2018 and 2024:

- Belgium: 4 – 7.5 – 9. Belgium has achieved an excellent score since its 2023 draft NECP. It follows the adoption of the first national cycling strategy, BECyclist, in 2021. Ambitious cycling modal share targets and strong budget commitments through its regions complete the picture. The final NECP has yet to be submitted.
- Hungary: 0 – 0 – 6 – 6. While Hungary entirely neglected cycling measures in its first-generation NECP, it now strategically refers to its new national cycling strategy adopted in 2023. For example, it commits to halving the number of cyclists fatalities by 2030 compared to 2022.
- Portugal: 0.5 – 6 – 6.5 – 6.5. The biggest improvement happened between the 2018 draft and 2019 final NECP, coinciding with Portugal's adoption of its first national strategy for active mobility. To regain momentum, it should commit to dedicated investment budgets to finance the 1,000km of new cycling infrastructure announced under the Programme Portugal Cyclable 2030.
- Slovenia: 1 – 5.5 – 2 – 8. Slovenia continues to be a roller coaster. While cycling is poorly incorporated in draft NECPs, it recovers its final versions. The process of developing a national cycling strategy should now be completed.
- Spain: 2 – 3.5 – 7 – 7. The country has made significant progress in recent years on sustainable urban mobility, reflected in the increased attention to cycling measures in its final NECP. The 2021 national cycling strategy has initiated progress in building infrastructure, providing bicycle parking spaces, and operating bike-sharing schemes.

Divers: These Member States deteriorated the most between 2018 and 2024:

- Finland: 3.5 – 5 – 2 – 2. The low scores in the Nordic-Baltic region have affected Finland. While the first generation final NECP received a 'moderate' score, Finland now scores 'unsatisfactory'. This decline may reflect the changed political landscape following the 2023 elections. All references to a national cycling strategy and concrete budget commitments have been removed.
- Sweden: 2 – 2.5 – 2 – 0.5. Sweden's score has declined from 'unsatisfactory' to 'insufficient,' making it the lowest scoring country in ECF's analysis. The sole reference to cycling in the 2024 NECP is the abandoning of a 2015 national programme for local and regional authorities called 'Climate Leap' which listed cycle paths as eligible investments.

5. Overall ECF assessment

In 2023 draft NECPs, ECF expressed its disappointment that – against the backdrop of the first-ever ‘European Declaration on Cycling’ adopted in April 2024 – cycling had only marginally improved compared to the 2018/19 first generation type of NECPs. One year on, we are pleased to see Member States catching up to the new realities. Cycling has gained visible recognition within Europe’s climate and energy strategies within the 2024 NECPs. The EU-wide average score across ECF’s 13 cycling indicators now stands at **5.4/10**, crossing the symbolic threshold of cycling becoming more than a marginal note in national climate planning.

There is progress, but it is uneven. Five Member States – Austria, Belgium, France, Italy, and Slovenia – demonstrate that cycling can be used as a core climate solution. Others, however, still neglect it almost entirely: Sweden, Finland, Denmark, Estonia, and Poland remain at the bottom. Europe will not meet its collective transport decarbonisation goals if only a handful of countries invest in active mobility.

Investment gaps persist. While 7 in 10 NECPs make a general commitment to investing in cycling, only 4 in 10 provide concrete budget figures for these investments. Without earmarked and sustained funding, new commitments risk remaining aspirational. The forthcoming **National and Regional Partnership Plans (NRPPs)** under the 2028–2034 EU budget will be decisive: cycling must be embedded to unlock cohesion funds and accelerate delivery.

The EU context creates momentum. The *European Declaration on Cycling*, the *Social Climate Fund* and the *Energy Performance of Buildings Directive* all provide a favourable framework. Cycling is explicitly recognised as a cost-efficient solution for reducing emissions, cutting energy use, and tackling transport poverty. National governments now have both the mandate and the means to act.

The road ahead. The NECPs are a step forward, but not yet sufficient to align with the EU’s ambition of creating a 90% reduction in transport emissions by 2050. To do this, Member States must:

- Set **clear modal shift targets** with cycling growth objectives and analyse its impact on transport GHG emissions;
- Develop and implement **robust national cycling strategies**;
- Guarantee **dedicated, long-term investment**;
- Build **cycling networks** and address **road safety** concerns;
- Use EU instruments – especially the Social Climate Fund – to make cycling accessible for all.

Conclusion. Cycling is no longer optional. It is Europe’s most energy-efficient mode of transport and a cornerstone of climate neutrality. The final NECPs show the glass is now half-full – only decisive investment and widespread uptake will ensure it does not remain half-empty.

6. Call to Action

By integrating cycling into national climate and energy policies, cycling policies gain a broader and more stable political platform.

As the most energy efficient transport mode, cycling should become a cornerstone of climate and energy policies. Consequently, measures to decarbonise the transport sector – such as purchase subsidies for electric cars – must be extended to (electric) bicycles as a matter of fairness and economic rationale.

Implementation of the final NECPs, submitted in 2024 and 2025 (due to delays), will be reviewed by the Commission every two years to evaluate whether Member States are on track to achieve their set targets.

ECF calls upon all Member States, particularly those with scores below 6, to take immediate action. Recommendations per Member State are provided in Annex B.

Cycling is a no-regret investment, delivering tremendous benefits for the energy and climate sector, as well as for mobility, public health, and tourism. To make a climate-neutral Europe by 2050 a reality, we need greater cycling ambition.

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

Country	Reference to cycling, or at least to "soft, active mobility" (0.5 pt)	General commitment to modal shift with increased cycle use (1 pt)	Measurable target to grow cycling by a specific year (1 pt)	General commitment to invest in cycling (1 pt)	Defined national budget <EUR 10 per capita/a (0.5 pt)	Defined ational budget >EUR 10 per capita/a (1 pt)	Reference to a SUMP or Mobility Management Plan (1 pt)	Reference to a National Cycling Strategy (1 pt)	Reference to a (Active) Mobility Law (1 pt)	Reference to building, developing cycling infrastructure (0.5 pt)	Reference to enhancing inter-modality (0.5 pt)	Reference to improving road safety for cyclists (0.5 pt)	Reference to cycling promotion (0.5 pt)	Reference to introducing fiscal incentives (0.5 pt)	Total 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	x	9
Bulgaria	x	x		x			x			x			x		4,5
Croatia	x	x					x			x	x		x	x	4,5
Cyprus	x	x	x	x	x		x			x	x		x		6,5
Czechia	x	x					x	x		x	x				4,5
Denmark	x			x	x					x			x		3
Estonia	x	x								x	x			x	3
Finland	x			x						x					2
France	x	x	x	x			x	x	x	x	x	x	x	x	9
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		x		7
Italy	x	x		x	x		x	x	x	x	x	x		x	8
Latvia	x	x		x	x					x	x			x	4,5
Lithuania	x	x	x				x			x	x	x		x	5,5
Luxembourg	x	x		x				x		x	x			x	5
Malta	x	x		x	x		x	x		x	x	x	x	x	7,5
Netherlands	x			x	x			x		x			x		4
Poland	x	x					x						x		3
Portugal	x	x		x			x	x		x	x		x	x	6,5
Romania	x	x							x	x				x	3,5
Slovakia	x	x		x	x				x	x	x				4,5

Slovenia	x	x	x	x			x	x		x	x	x	x	x	8
Spain	x	x		x			x	x	x	x	x		x		7
Sweden	x														0.5
	27	23	7	19	8	3	16	14	6	26	19	9	16	15	5,4

Annex B – Country analysis and recommendations

Country	Notable cycling references incorporated in NECPs	ECF analysis and recommendations
Austria	• “The Federal-Länder-Municipality Agreement to promote cycling at the 2022 Cycle Summit laid the basis for enhanced cooperation between the Federation, the Länder, cities and municipalities in order to increase the share of cycling on the modal split to 13 % by 2030.” • “Around 40 % of car journeys are shorter than 5 kilometers, i.e. at cycling distance. With the implementation of the government programme, federal funding for the development of infrastructure has been massively increased.”	Austria has a strong track record of supportive cycling policies at national level, reflected in their NECP which highlights various cycling measures. To achieve a 13% mode share by 2030, the NECP estimates that €7 billion investments are needed. While the plan highlights substantial increases in federal investments in recent years, it does not specify the extent to which federal funding will contribute to reaching this target. Score: 8.5/10 ECF recommendation: • Accelerate federal investments in cycling programmes beyond current levels.
Belgium	Belgium has not yet submitted its final NECP to the European Commission. We used the score from their draft NECP (9/10) to compute the average EU-27 score.	
Bulgaria	• “Reducing the relative share of private motor vehicle travel by improving and developing urban public transport and by developing non-motorised transport.” • Design and implementation of new infrastructure for cycling.	Bulgaria’s NECP includes references to cycling, but they are not specific, time-bound or resourced. Score: 4.5/10 ECF recommendations: • Commit to modal shift in the transport sector by setting specific and measurable cycling modal share targets for the year 2030 and beyond. • Develop and implement a comprehensive national cycling strategy. • Adopt ambitious investments plans for cycling infrastructure with dedicated and sustained annual budgets.
Croatia	• “Encourage the transition from private to public transport, car sharing and cycling.” • A minimum of 15 developed sustainable urban mobility plans • The introduction of public urban bicycle systems and the	Croatia is the first country in the Balkan-region to have developed a coherent national policy framework for cycling but fails to include any references to it in its NECPs. Various cycling measures are highlighted, but these could be more explicit. Score: 4.5/10

	construction of associated cycling infrastructure	ECF recommendations: • Set ambitious, yet realistic and specific, cycling targets for 2030 and beyond. • Incorporate references to the 2023 national cycling strategy, adopted in 2023, into the NECP and commit to its full implementation.
Cyprus	• "The current travel share is: 91 % private vehicle, 3 % public transport, 5 % on foot and 1 % micro-mobility, while the target share for 2030 is: 82 % private vehicle, 8 % public transport, 6 % on foot and 4 % micro-mobility. • Total investment for the implementation of sustainable mobility measures is estimated at €882 million; 450,000 for micro-mobility/ annually. • 17 actions to promote urban cycling and micro-mobility.	Cyprus ranks among the EU countries with highest car dependency, yet has committed to reducing car mode share from 91% at present to 82% by 2030, with 4% allocated to "micro-mobility," including cycling. They have budgeted €450,000 annually for micro-mobility, but this is insufficient to achieve their objectives. Score: 6.5/10 ECF recommendations: • Develop a comprehensive national cycling strategy. • Conduct an investment need analysis to determine funding requirements for achieving 4% micro-mobility mode share by 2030, and increase investments accordingly.
Czechia	• "The implementation of the National Strategy for the Development of Cycling Transport for 2013-2020 and the Urban and Active Mobility Concept 2021-2023 (MD) are intended to improve coordination of development and the conditions for using this environmentally friendly non-motorised mode of transport." • Construction of cycle paths • Standards for bicycle parking spaces	The main reference to cycling in Czechia's NECP is the Urban and Active Mobility Concept, which is quoted as lasting until 2023 only, though its real timeframe is 2030. Score: 4.5/10 ECF recommendations: • Incorporate ambitious, yet realistic and specific, cycling targets for 2030 and beyond in the NECP. • Strengthen the strategic capability of the Urban and Active Mobility Concept and provide it with sustained funding.
Denmark	• Improve cycling facilities along the state road network • Funds are set aside for the promotion of cycling infrastructure and an advisory centre for bicycle promotion	Despite Denmark's status as a cycling nation, references to active mobility in its NECP are surprisingly sparse. While they are currently developing a new national cycling strategy, they fail to mention it in their NECP. Score: 3/10 ECF recommendations: • Set ambitious, yet realistic and specific, cycling targets for 2030 and beyond.

		• Complete the national cycling strategy in a timely manner and allocate appropriate levels of investment for its implementation.
Estonia	• The share of public transport, cycling and walking should be 55 % by 2035, including 60 % in urban areas. The baseline in 2020 was 38%. • Development of cycling and footpath infrastructure. • A €9 million zero-emission vehicle subsidy fund also included bicycles.	Like Denmark, Estonia is currently developing a national cycling strategy but does not reference it in its NECP. It is a missed opportunity to reinforce the position of cycling in cross-sectoral policy frameworks. Score: 3/10 ECF recommendations: • Complete the national cycling strategy in a timely manner and allocate appropriate levels of investment for its implementation.
Finland	• “Other measures to improve the energy efficiency of the transport system include the investment programme for walking and cycling.”	Cycling is almost completely absent in Finland’s NECP. Score: 2/10 ECF recommendations: • Commit to modal shift in the transport sector by establishing specific and measurable cycling modal share targets for 2030 and beyond. • Renew the national Walking and Cycling Promotion Programme that expired in 2023. • Adopt ambitious investments plans for cycling infrastructure and programmes with dedicated and sustained annual budgets.
France	• A sharp increase in cycling (from 5 to 19 billion km) • An extended and reinforced active mobility fund under the 2023-2027 national cycling plan, amounting to €1.5 billion. • Agglomerations with more than 150,000 inhabitants, located on metropolitan territory, are required to have introduced a low-emission mobility zone by 31 December 2024. • Doubling the cycling network to 100,000 km by 2030. • Purchase premiums for new and second-hand (electric) (cargo) bikes.	France has submitted the strongest NECP when it comes to cycling growth ambitions. The shift to active mobility is supported by a strong regulatory framework on sustainable urban mobility. However, the dire state of its national public finances, and constant change in governments, has negatively impacted cycling investments: in 2024 national funding was cut entirely; for 2025, national funds may be reduced to as little as €50m. If funding does not rebound to the initially foreseen levels stated in its NECP, France is very unlikely to meet its growth targets. Score: 9.0/10 ECF recommendations: • Secure sufficient funds for cycling investments or risk losing the

		momentum for cycling development built in previous years.
Germany	• With the National Cycling Plan 3.0, cycling has been strategically aligned with climate action goals. • The aim is to have more, better, and safer cycling routes in cities and rural areas across Germany (e.g., doubling the number of kilometers cycled by 2030). • The Federal Government is providing extensive funds through various programmes for both investment and non-investment promotion and financing of cycling infrastructure, which falls under the responsibility of the Länder and municipalities. • Extension of the tax exemption for the provision of a company bicycle, or electric bicycle to the employee.	Germany's NECP makes strong references to cycling. Its tax exemption policies for providing company bicycles leased to employees is one of the most progressive ones in Europe. Still, Germany's NECP would improve if it included commitments to increase central government spending on cycling. Score: 7/10 ECF recommendations: • Carry out an investment gap analysis, like Austria's, to achieve the target of doubling kilometers cycled by 2030. • Increase central government spending on cycling accordingly.
Greece	• Develop a National Action Plan for the Promotion of Cycling. • Promote provisions of the Road Code promoting alternative forms of travel (pedestrian, cycling, micromobility) with a view to ensuring safe traffic. • Mandatory SUMPs by all municipalities with more than 30,000 inhabitants. • Introduction of a mandatory parking space for the purchase of a new car. • Tax relief for the acquisition of a bicycle/electric bicycle/e-van for corporate travel, and/or replacement of a conventional private car or MOTO with a bicycle.	Greece provides an accurate analysis of the multifaceted urban mobility challenges facing Greek cities. A new policy requiring residents to provide private parking spaces when purchasing new cars would be both logical and highly welcome. However, cycling remains weak and lacks strategic strength in the overall framework. A proposed VAT reduction on the sales of (electric) bicycles that was still included in the draft NECP has been removed. Score: 5/10 ECF recommendations: • Set ambitious, yet realistic and specific, cycling targets for 2030 and beyond. • Develop the National Cycling Strategy/Action Plan and proceed with its implementation without delay. • Provide sustained funding for implementation of the National Cycling Action Plan. List these investments clearly in table 40 of the NECP. • Include e-bikes and e-cargo bikes in all national electromobility strategies, for example, in corporate travel policies.
Hungary	• "The National Cycling Strategy defines the objectives, direction and financial background of cycling	Only one short paragraph on cycling is found in Hungary's 272-page NECP: a reference to the National Cycling Strategy. Fortunately, a few more specific targets

	developments for the period 2023-2030." • 35% of the population use bicycles as their main means of transport more than once a week. • Cycling fatalities will be reduced by 50% compared to 2022. • Supported targeted cycling infrastructure: Target (2029): 728.1 km • Promotional cycling campaigns (Bike to Work! campaign, Cycling across 7 borders, Cycle to Green!) • Cyclist Friendly Awards (Cyclist Friendly Municipality and Cyclist Friendly Workplace)	and interventions are outlined in Annex 1. ECF positively notes that the National Cycling Strategy is included in the National Climate Change Strategy. Score: 6/10 ECF recommendations: • Earmark sustained funding for implementing the National Cycling Strategy. While the 2023 NCS estimates the financial resources *required* for its implementation [HUF 248 billion; approximately EUR 625 million], it does not specify what the central government is actually ready to invest in cycling programmes until 2030.
Ireland	• "Encourage greater levels of walking, wheeling, and cycling over private car usage through accelerated delivery of e.g. Safe Routes to School programme, Sustainable Mobility Policy Pathfinder schemes, and National Cycle Network and Cycle Connects strategies." • "More positive behavioural change signals were recorded with respect to education-related journeys, with 88% more primary school children commuting by bicycle than in 2016, and the number of students aged 13 to 18 cycling to school up by 79%." • Cycling is integral part of the BusConnects programme which builds separate cycling infrastructure alongside bus corridors in Ireland's 5 major cities. • An expanded network of an additional 1,000 km in walking and cycling infrastructure.	Ireland has developed credible modal shift policies in the transport sector, as clearly outlined in its NECP and cross-referenced in the National Sustainable Mobility Policy (SMP) and its associated SMP Action Plan 2022-2025. Ireland is one of the few countries in Europe that has included active modal shift policies in its WAM (With Additional Measures) GHG emissions projections. Score: 7/10 ECF recommendations: • Clearly incorporate the cycling and active travel objectives in its SMP into the NECP. • Update the financial investment figures for cycling and active travel in the NECP to express one clear figure for its investment.
Italy	• "With Ministerial Decree 444/21, the adoption of SUMPs has become an essential requirement starting in January 2023 for access to funding for both Rapid Mass Transit and Cycling." • Mandatory development and adoption of bicycle plans for all municipalities with more than 100,000 population (Article 6 of Law No. 2 of January 11, 2018)	Italy's final NECP includes multiple references to cycling and highlights various central government decrees that promote municipal cycling plans and making access to national funding conditional on developing SUMPs. The plan also details various funding programmes with specific financial figures. Unfortunately, the 2022 national cycling plan is only mentioned in passing.

	• €200 million, out of €150 million from the NRRP, to build a total of 565 km in urban and metropolitan cycle paths by 2026	Score: 8/10 ECF recommendations: • Set ambitious, yet realistic and specific, cycling targets for 2030 and beyond. • Commit to fully implementing the 2022 national cycling plan. • Establish one aggregated cycling investment figure for all programmes and grants listed in the NECP. Secure new and additional funding for cycling projects beyond the NRRP. • Include bicycles and e-bikes in the Ecobonus programme.
Latvia	• Installing at least 3,000 slow-charging points, including for e-bikes, near apartment buildings, in parking lots • Subsidizing the purchase of at least 12,000 emission-free micromobility vehicles, including e-bikes • Constructing 300km of cycle infrastructure and 300 parking spaces • Creating 8 mobility points, including bicycle parking	Latvia is the only country whose 2023/24 draft NECP completely ignored cycling. Fortunately, their final NECP incorporates cycling, which ECF welcomes. The plan lists at least four transport programmes that incorporate cycling measures. However, while indicative investment sums are provided to implement these measures, state funding seems to be only partially secured. Score: 4.5/10 ECF recommendations: • Set ambitious, yet realistic and specific, cycling targets for 2030 and beyond. • Develop a comprehensive national cycling strategy. • Secure adequate funding sources to implement the planned cycling programmes.
Lithuania	• Reach a minimum of 60% of urban journeys by public transport, cycling and walking. • Construct or reconstruct at least 600km of new or existing bicycle and pedestrian paths. • Make public transport more attractive through bicycle rental. • Provide incentives for the purchase of e-bikes.	Lithuania's final NECP highlights only a few cycling measures. No reference is made to the 2024 national cycling strategy. We applaud that cycling measures are included in transport GHG emission reductions and energy savings projections. Score: 5.5/10 ECF recommendations: • Reference the national cycling strategy in the NECP and commit to its full implementation. • Specify investments in the transport sector, and earmark funds for cycling programmes.

<table>
<tr><td>Luxembourg</td><td>The national cycling network will be extended from 650 km to 1,100 km.
Extensions of municipal networks can be subsidised at a rate of 30% if they constitute a connection to the national grid.
All national cycle paths will be equipped with signage</td><td>Luxembourg’s final NECP lists only a few cycling measures, with a particular focus on developing the national cycling network.

Its bicycle/e-bike support programme has a strong social focus, restricting eligibility to people in households that receive cost-of-living allowances or the energy bonuses.

Score: 5/10

ECF recommendations:
Set ambitious, yet realistic and specific, cycling targets for 2030 and beyond.
Include specific investment figures in the NECP.</td></tr>
<tr><td>Malta</td><td>“The National Cycling Strategy, which includes a comprehensive National Cycling Action Plan, is in the final stages of development and aims to enhance the adoption of cycling as a sustainable mode of transport in Malta.”
“Complimenting the already integrated cycle lanes in major road infrastructure projects on the TEN-T Network and beyond, in October of 2022 the Government announced its commitment to invest a further €35 million by 2029 to create a network of clean urban transport infrastructure (covering 50- 60km) connecting various areas of the country in order to further promote a multimodal shift in mobility.”</td><td>Malta’s final NECP makes several references to cycling and active mobility. We welcome the integration of cycling into TEN-T projects and the commitment to invest €35 million into cycling by 2029.

Score: 7.5/10

ECF recommendations:
Set ambitious, yet realistic and specific, cycling targets for 2030 and beyond.
Complete the development of the National Cycling Strategy/Action Plan in a timely manner and implement it without delay.</td></tr>
<tr><td>Netherlands</td><td>Continue to promote cycling and walking in line with the Cycling Ambition 2022-2025 and the National Vision for the Future of Cycling 2040.
Invest €780 million into active mobility by making new housing sites accessible by walking and cycling.
Contribute to a nationwide network of cycle routes.</td><td>Netherlands’ NECP hardly reflects its status as Europe’s leading cycling country. Active mobility is dealt with in only one paragraph.

Score: 4.0/10

ECF recommendations:
Commit to increasing a modal shift to cycling and incorporate specific cycling targets in the NECP.
Significantly increase central government investments in cycling to sustain Netherlands’ reputation as Europe’s cycling nation.
Extend electric car purchase premiums to e-bikes.</td></tr>
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<tr><td>Poland</td><td colspan="2">Poland has not yet submitted its final NECP to the European Commission. We used Poland’s score from the draft NECP (3/10) to compute the overall EU-27 average score.</td></tr>
<tr><td>Portugal</td><td>“A continued commitment to public transport and active mobility, changing Portuguese mobility patterns and reversing historical trends, is one of the most important decarbonisation and energy efficiency measures to be pursued.”
Implement the National Strategy for Active Mobility 2020-2030
Build 1,000km of cycle lanes through the Programme Portugal Ciclable 2030</td><td>Cycling measures receive specific attention in Portugal’s final NECP with a key focus on implementing the 2020 National Strategy for Active Mobility. Government investment figures are missing in that plan.

Score: 6.5/10

ECF recommendations:
Set ambitious, yet realistic and specific, cycling targets for 2030 and beyond.
Support the implementation of the National Strategy for Active Mobility with dedicated and sustained annual budgets.</td></tr>
<tr><td>Romania</td><td>Continue the implementation of the campaigns and subsidies for buying new bicycles and renting bicycles
Continue the construction of new bicycles tracks.
Provisions on bicycle parking as set by the EPBD.</td><td>Romania’s NECP contains no ambition to change its status as one of the least developed cycling countries in the EU. The plan has only lukewarm commitments to cycling. References to targets, indicators and budgets are completely absent.

On the positive side, Romania’s NECP is includes very detailed references to EPBD requirements on Art. 14 “sustainable mobility,” including bicycle parking.

Score: 3.5/10

ECF recommendations:
Set ambitious, yet realistic and specific, cycling targets for 2030 and beyond.
Develop, adopt and implement a comprehensive national cycling strategy.
Adopt ambitious investments plans for cycling with dedicated and sustained annual budgets.</td></tr>
<tr><td>Slovakia</td><td>Build nearly 500km of cycling infrastructure by investing almost €190 million from the RRF (€85 million) and the ERDF (€100 million).</td><td>Slovakia’s final NECP includes few references to cycling, albeit very specific ones in terms of investments, as well as a cycling infrastructure output indicator.

Regrettably, the final NECP does not include a commitment found in its draft plan to update the national cycling and cycle touring strategy by the end of 2023/2024. It now lists its 2013 strategy as the one that continues to provide guidance for developing and implementing cycling</td></tr>
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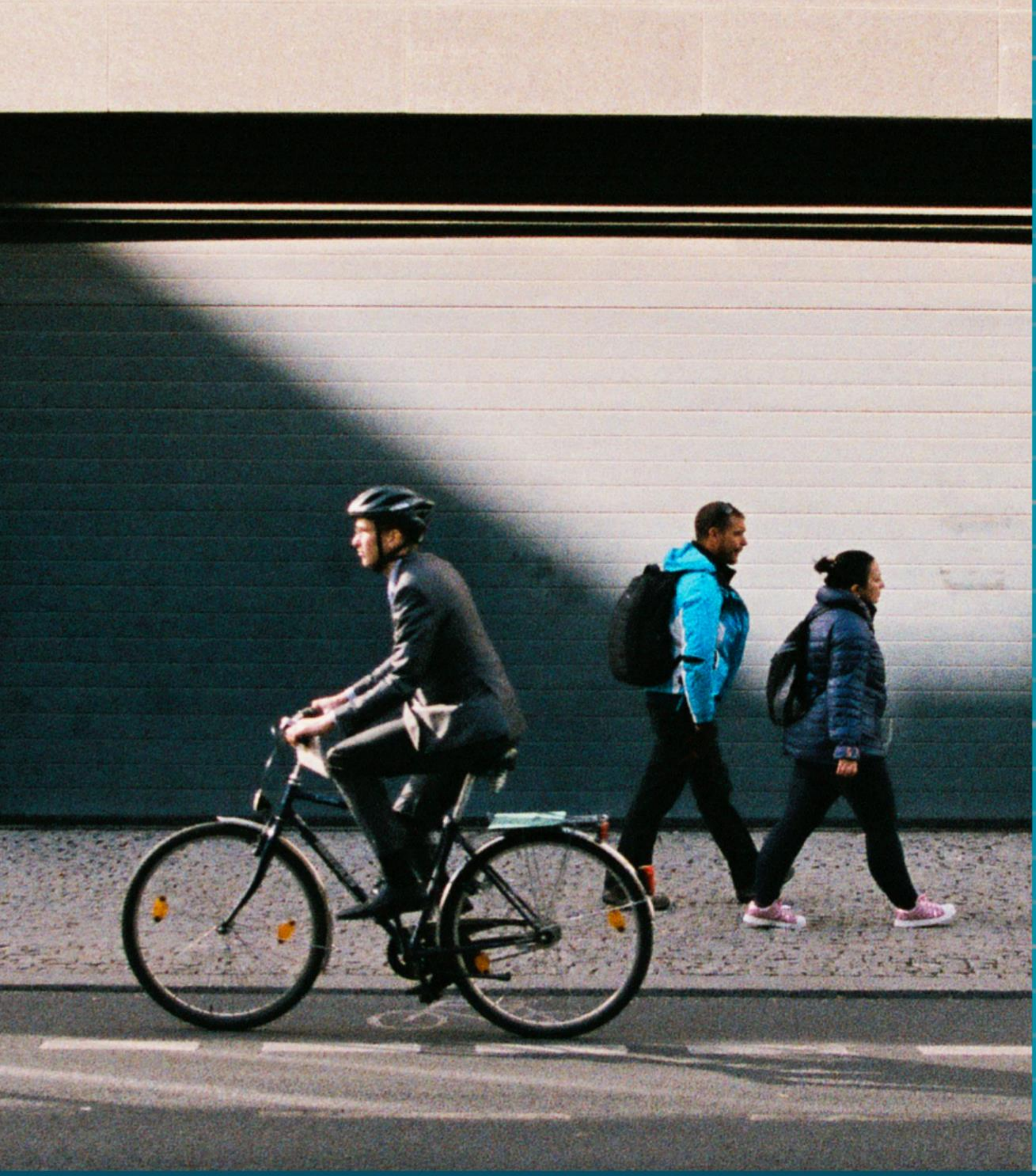
		policies. ECF considers the 2013 cycling strategy as outdated. Score: 4.5/10 ECF recommendations: • Set ambitious, yet realistic and specific, cycling targets for 2030 and beyond. • Update the 2013 National Strategy of Development of Cycling Transport and Cycle Touring.
Slovenia	• The share of total bicycle journeys rises from 5.3 % in 2021 to 8 %. The share of all bicycle journeys in urban municipalities increases to 12 %. • Adoption and intensive implementation of the Strategic Plan for the Development of Cycling by 2030. • Implementation of promotional campaigns for cycling and walking, certification of a cyclist-friendly employer and other measures set out in the 2030 Strategic Cycling Development Plan • Support schemes for the purchase of bicycles (normal, e-bikes, cargo bikes, adapted bicycles, etc.).	Slovenia's inconsistent approach to cycling's role in its draft and final NECP continues. While the draft NECP barely addressed cycling, active mobility is now fully included with concrete target, outputs and expected results, including in terms of GHG emission reductions. Slovenia's plan also includes promising wider mobility measures, such as introducing maximum parking standards for new constructions as part of municipal spatial plans. Score: 8/10 ECF recommendations: • Swiftly adopt the draft Strategic Plan for the Development of Cycling with an interim cycling modal share target for 2027. • Complement strategic plan with a 3-year action programme with measurable KPIs. • Ensure mandatory inclusion of bicycle parking facilities in all new and renovated buildings. • Adopt ambitious investments plans for cycling with dedicated and sustained annual budgets, including extending subsidies for electric cargo bikes.
Spain	• Strategic documents: The State Strategy for Bicycle was published on 8 June 2021, with a time horizon until 2025. […] The Bicycle Strategy is understood as one of the key actions under the Secure, Sustainable and Connected Mobility Strategy 2030, which is included under policy window 1, 'Mobility for all'. • The Law on Climate Change and Energy Transition, which stipulates in Article 14.3 the development of	Spain's final NECP benefits from strong legal support for sustainable urban mobility policies, with cycling as an integral component. This extends also to investments; however no dedicated cycling budgets are mentioned. Various action points on cycling infrastructure, promotion and road safety are briefly mentioned but lack sufficient detail. Score: 7/10 ECF recommendations:

	sustainable urban mobility plans for municipalities with more than 50.000 inhabitants.	• Renew the State Strategy for the Bicycle which expires in 2025. • Set ambitious, yet realistic and specific, cycling targets for 2030 and beyond. • Adopt ambitious investments plans for cycling with dedicated and sustained annual budgets.
Sweden	• Since 2015, all types of organisations can apply for support for local and regional climate investments under the so-called Climate Leap. The applications are in competition with each other based on the estimated greenhouse gas reduction per SEK invested. Examples of eligible investments include […] cycle paths and bicycle infrastructure.	Sweden's NECP does not anticipate any modal shift scenarios for reducing transport passenger GHG emissions. Urban mobility and active mobility are completely absent, with the exception of a reference to the expired Climate Leap programme. Score: 0.5/10 • Set ambitious, yet realistic and specific, cycling targets for 2030 and beyond. • Develop a comprehensive national cycling strategy. • Secure adequate funding sources to implement the planned cycling programmes.



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