Plan 4 Climate

CAN CLIMATE ACTION NETWORK Europe

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NECP tracker 2026 update



October 2026

Introduction: the NECP tracker and its 2026 update

The **NECP tracker**, firstly developed by the LIFE Unify project (2019-2022), expanded by the LIFE TogetherFor1.5 project (2022-2025), and now further improved as part of the LIFE Plan4Climate project (2025-2028), is an online tool that provides a visual representation of the ambition and implementation of NECPs, based on a selection of climate (greenhouse gas emissions), energy and social indicators.

The NECP tracker has a double function: on the one hand, it *assesses the* ***ambition*** *of the latest available NECPs* by comparing them with EU 2030 climate targets and energy benchmarks (and the older NECPs, dated 2019). On the other hand, it *monitors whether national governments are* ***implementing*** *their NECPs as planned* by comparing them with historical data (from EEA and Eurostat). It currently covers 17 EU Member States: Belgium, Bulgaria, Croatia, Cyprus, Czechia, Denmark, Estonia, France, Germany, Greece, Hungary, Ireland, Italy, Poland, Portugal, Slovenia and Spain.

This briefing, developed under the LIFE Plan4Climate project and based on the 2026 update of the tracker, focuses on the **implementation of NECPs**. The update features historical data up to 2024[1], which allows for a comparison directly against the updated NECPs' scenarios, based on existing and planned policies and measures[2] (rather than against the outdated 2019 plans). In other words, the tracker now shows, with greater precision, **whether Member States are catching up with the latest ambition levels they themselves expected to achieve**.

The 2026 update also introduces a new set of socio-economic indicators, **covering energy poverty and fossil fuel subsidies**. These are two of the clearest markers of whether Europe's climate and energy planning is actually rooted in social justice, to ensure that no one is left behind in the

[1] Except the ETS sectors indicator, for which 2025 values are already available.

[2] This assessment relies on scenarios with additional measures (WAM), and on scenarios with existing measures (WEM) where WAM is not available. The comparison is made against NECP's expected pathways (i.e. scenarios), rather than against the NECP targets. We have prioritised scenarios over targets because (1) they provide annual values, i.e. they are comparable with 2024 historical data, whereas NECP targets typically refer only to 2030; and (2) while not being binding political commitments, WAM and WEM scenarios reflect the real level of ambition of the plans, as they are derived from the policies and measures actually included in the NECPs.

transition. For energy poverty, the tracker monitors two of the most solid proxies, also used by Eurostat and the EU Energy Poverty Advisory Hub (EPAH): arrears on utility bills and the inability to keep homes adequately warm. For fossil fuels subsidies, it draws on OECD data as historical reference. By tracking these dimensions alongside GHG emissions and energy indicators, the NECP tracker can highlight gaps, inconsistencies between NECPs and other national or international monitoring frameworks, and show whether Member States are addressing the social dimension of decarbonisation as a strategic priority, rather than treating it as a bureaucratic afterthought to their NECPs.

This briefing illustrates the main findings coming out of this year's update of the NECP tracker, based on historical data for 2024. Each section also includes a set of recommendations for the upcoming post-2030 legislative process.

Key findings include:

1. In 2024, gross emissions in several Member States did not decline in line with expected national scenarios. Also, the constant evolution of LULUCF data underlines the need to keep gross emissions and removals as separate targets in the post-2030 framework.
2. In 2025, ETS emissions are falling faster than expected in most countries — confirming that the system is working and should not be weakened after 2030.
3. In 2024, GHG emissions in effort-sharing sectors were not falling fast enough — underlining the need to strengthen policy efforts for decarbonisation in these sectors and ensure they are adequately supported by the next EU Budget.
4. In 2024, renewables and energy savings were not advancing fast enough. The post-2030 framework must include binding, ambitious targets, and introduce stronger compliance mechanisms for both.
5. NECPs lack both targets and monitoring tools for fossil subsidies and social indicators, such as energy poverty. The revision of the Governance Regulation should address these gaps.

Key findings - *based on 2024 data*

1. In 2024, gross emissions in several Member States did not decline in line with expected national scenarios. Also, the constant evolution of LULUCF data underlines the need to keep gross emissions and removals as separate targets in the post-2030 framework.

In 2024, **gross GHG emissions** were declining compared with the previous year in most EU Member States covered by the NECP tracker, with Belgium, Cyprus, Greece and Slovenia as notable exceptions. This does not necessarily mean, however, that gross GHG emissions were declining at the rate foreseen in the national scenarios[3] each EU Member State provided in its respective NECP. In fact, several countries (7 out of 17) were underperforming compared with their NECP scenarios, with Croatia, Cyprus, Czechia and Spain showing the largest (and most concerning) relative gaps.

By contrast, **gross GHG emissions were in line with or better than NECP expectations in 10 out of 17 countries**, of which a few (Bulgaria, Estonia, Hungary and Italy) performed significantly better than anticipated. This does not necessarily mean that these countries are on track to achieve their 2030 gross GHG emissions targets: as previous analyses have shown, **several national targets were not backed up by credible policies and measures**, let alone sufficient to offer a fair contribution to meet the Paris Agreement objectives.

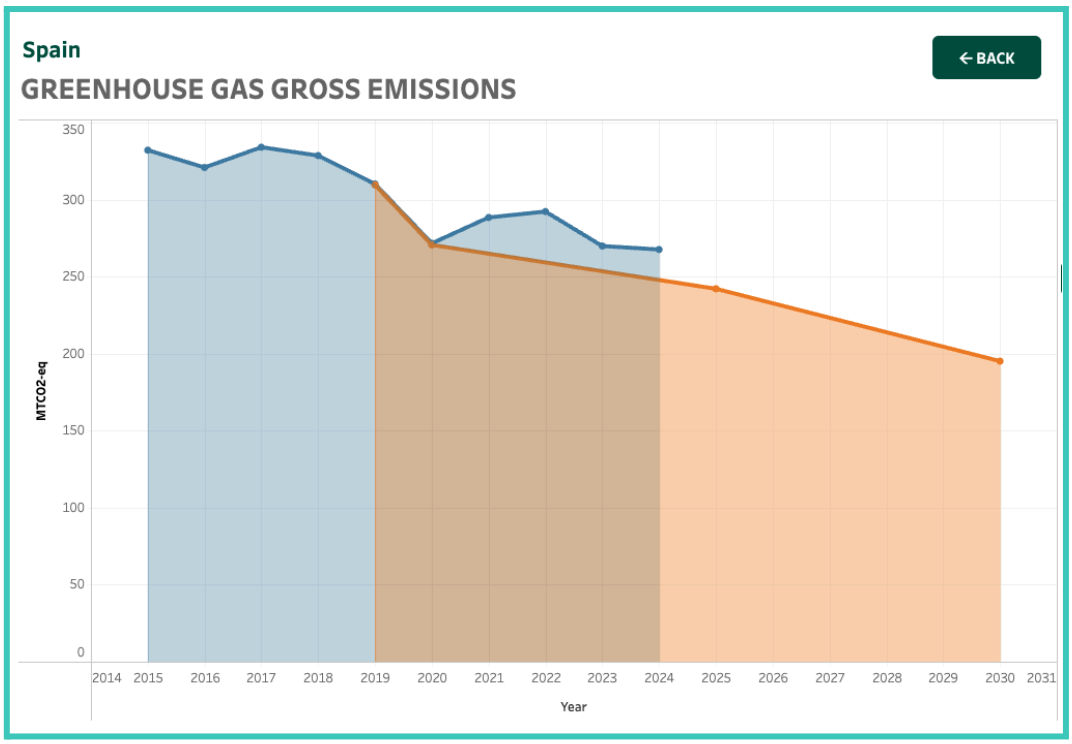
For net GHG emissions, the comparison between historical data and NECP scenarios is much less robust, because any improvement is driven by **natural carbon sinks (LULUCF)**, for which the accounting methodology has been rapidly and constantly evolving. In several cases, this leads to substantial **data discrepancies between LULUCF historical figures and the NECP scenario baseline years, with gaps**, reaching −93% in Germany, −91% in Slovenia, +87% in Cyprus, +61% in Ireland, −57% in Estonia and −52% in France. This makes it impossible to assess countries' performances over the respective NECP expectations. It is important to note that these are not marginal accounting issues: they reflect improvements in the LULUCF reporting system and dataset, subject

[3] As mentioned in the introduction, the comparison is against expected decarbonisation scenarios, which provide annual values, and not against the respective NECP target for 2030.

to repeated recalculations and substantial changes from one year to the next[4], as well as natural disasters that decrease carbon sinks potential, which hampers the possibility to develop credible net long-term scenarios.

This weakness is likely to become even more structural as extreme weather events, including wildfires, will increase sinks and emissions' variability from year to year. For this reason, the post-2030 framework should not rely on a single blended net figure: **gross emissions and removals (both from LULUCF and industrial removals) should be kept as separate targets**.

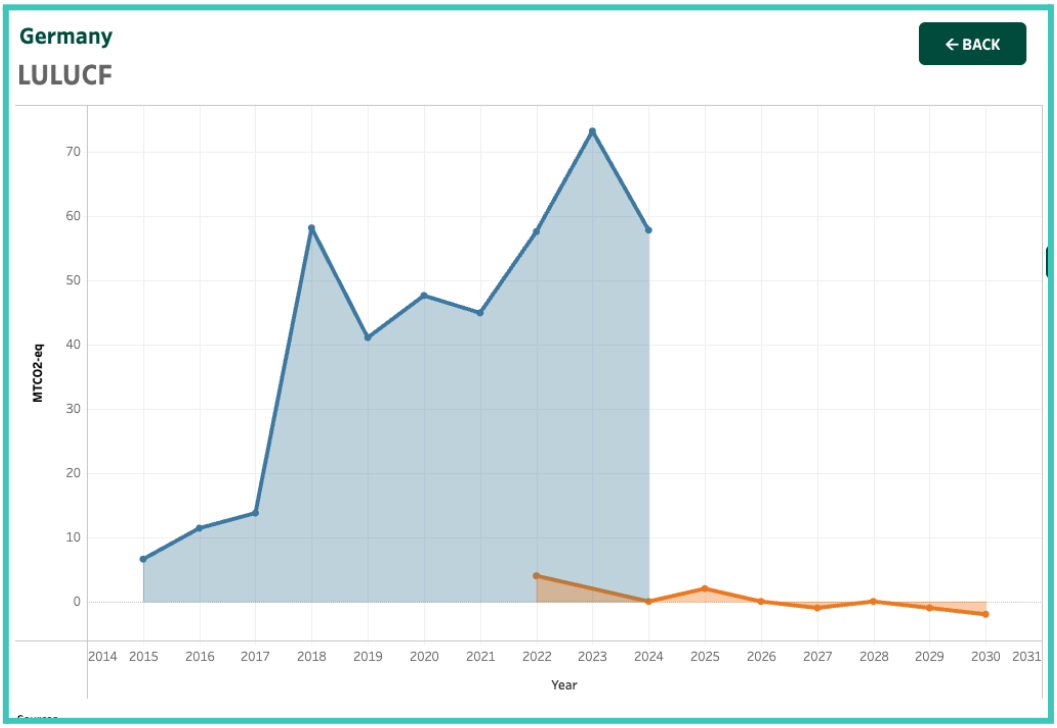
Figure 1: Spain is one of the EU countries where gross emissions (in blue) did not decline in line with expected NECP scenarios (in orange).



Explore more at the interactive NECPs Tracker at https://plan4climate.caneurope.org/

[4] The EEA and national inventories revise LULUCF historical estimates every year, often introducing substantial changes compared to previous calculations. This yearly recalculation makes the updated figures not directly comparable with the data that Member States used when developing their NECP scenarios.

Figure 2: Germany is one of the EU countries showing the starkest data discrepancies between historical emissions of the LULUCF sector (in blue) and the NECP scenario baseline years (in orange).



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2. In 2025, ETS emissions were falling faster than expected in most countries — confirming that the system is working and should not be weakened after 2030.

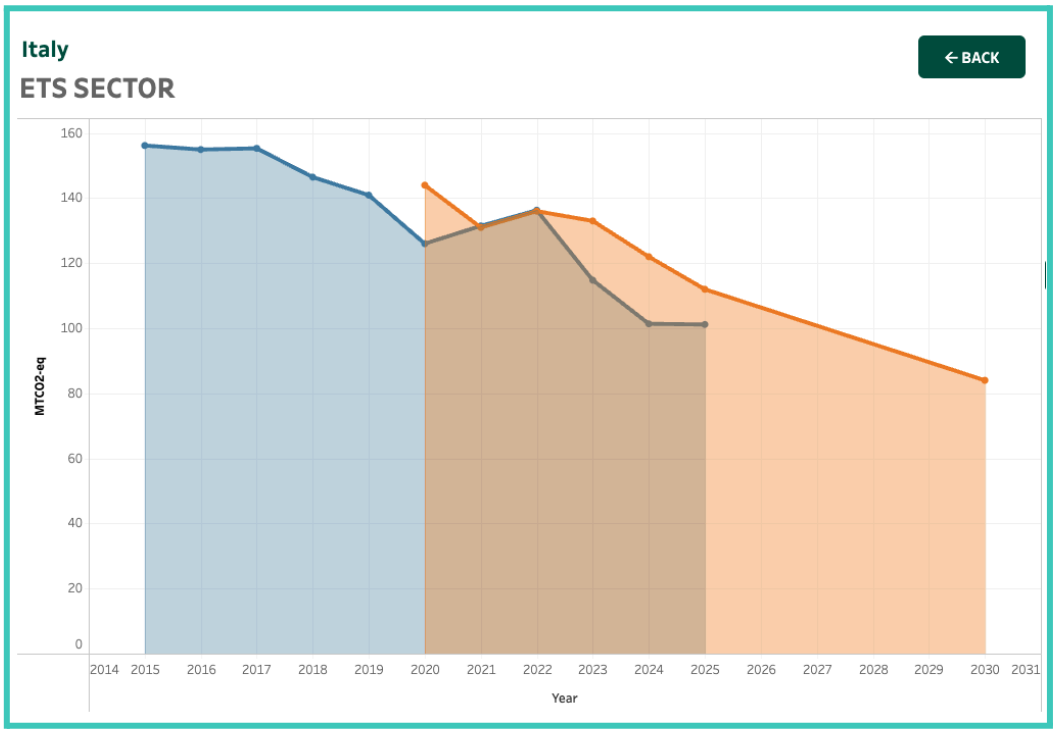
In their NECPs, Member States are not required to describe the policies and measures that will reduce GHG emissions in sectors covered by the EU ETS. They must, nevertheless, provide scenarios showing how ETS emissions are expected to evolve consistently with EU climate targets. This makes the comparison between historical data and WAM scenarios useful as a benchmark against Member States' own expectations, rather than as a direct assessment of NECP policy implementation in ETS sectors.

For ETS, 2025 data are already available[5] and they show that, with some exceptions, **ETS emissions are declining in most Member States covered by the NECP tracker** (13 out of 17, with the notable exceptions of Belgium, Croatia, Portugal and Spain) compared to the previous year. This result is largely delivered by the energy sector (notably by the power generation sector) rather than by energy-intensive industry[6].

[5] As mentioned in the introduction, the ETS indicator is the only one for which 2025 historical data is available.
[6] Emissions from energy-intensive industries are also more uneven, i.e. observed changes do not necessarily reflect structural decarbonisation.

The comparison of historical data with WAM scenarios points in the same direction. The exceptions are limited but relevant: Spain shows moderate gaps, suggesting that their ETS emissions are not falling as quickly as anticipated in their NECP scenarios, while Cyprus and Czechia are significantly above expected scenarios. On the other hand, of the 16 Member States for which comparable ETS data are available, 13 are already below their expected ETS scenario — eleven by a significant margin[7]. Overall, this means that ETS emissions are generally in line with or lower than what Member States expected when drafting their NECPs. **This indicates that the ETS system, as it is currently structured, is delivering according to expectations. The post-2030 review should therefore preserve its integrity and ambition**, rather than dilute the system through weaker design choices; the priority should be to reinforce a framework that is already delivering, not to reopen its core architecture.

Figure 3: Italy is one of the EU countries where emissions from the ETS sector are falling faster than expected by the NECP scenario. As currently structured, the EU ETS is reducing emissions in most countries.



Explore more at the interactive NECPs Tracker at https://plan4climate.caneurope.org/

[7] The energy sector shows a similar pattern, with emissions in most Member States falling well below the NECP expected scenario. For the industry sector, on the other hand, NECP Tracker data is less robust due to differing accounting methodologies: seven countries exhibit substantial base-year inconsistencies between WAM scenarios and historical data, limiting the comparability of results.

3. In 2024, GHG emissions in effort-sharing sectors were not falling fast enough, underlining the need to strengthen policy efforts for decarbonisation in these sectors and ensure they are adequately supported by the next EU Budget.

In their NECPs, Member States need to set out credible policies, measures and investment plans to cut GHG emissions in sectors covered by the Effort-Sharing Regulation (or ESR)[8]. These are the sectors where **emissions are falling the slowest** (if not even increasing) and where **most Member States are behind expected scenarios.** Across the 17 Member States covered by the tracker, **emissions in effort-sharing sectors fell by only 1.2% in 2024**, the weakest annual reduction since 2019. This headline figure also hides another worrying dynamic: **10 of the 17 Member States recorded an actual increase between 2023 and 2024** (only Greece, Poland, Denmark, Portugal, Germany, Italy and Ireland managed to cut their emissions).

When measured against the trajectories Member States themselves set out in their NECPs, the picture gets even worse: **only 3 of the 16 assessable[9] countries** (Hungary, Ireland and Poland) **are ahead of their NECP projections**. Notably, four of the five biggest emitters are behind their own NECP scenarios, with France (+12.1%) and Spain (+8.5%) showing the most significant delays.

At the sectoral level, **transport sends the strongest negative signal**: emissions rose again in 2024, and most countries (14 out of 17) are above their NECP scenarios, with particularly large gaps in Croatia, Portugal, Czechia, Spain and Bulgaria.

The picture is more mixed in the **buildings** sector, with emissions increasing in 9 out of 17 Member States. **Agriculture** remains largely stagnant, with emissions barely falling since 2005, while **waste** shows some long-run progress but still uneven performance across Member States. Except for transport, the comparison between sectoral trends and NECP projections is not too reliable, because several NECP scenario base years do not align well with historical inventory data; nonetheless, the broad picture is that these sectors are not yet delivering the structural reductions needed to close the effort-sharing gap.

[8] The sectors covered by the Effort-Sharing regulation include: transport, buildings, agriculture, waste and small industry.

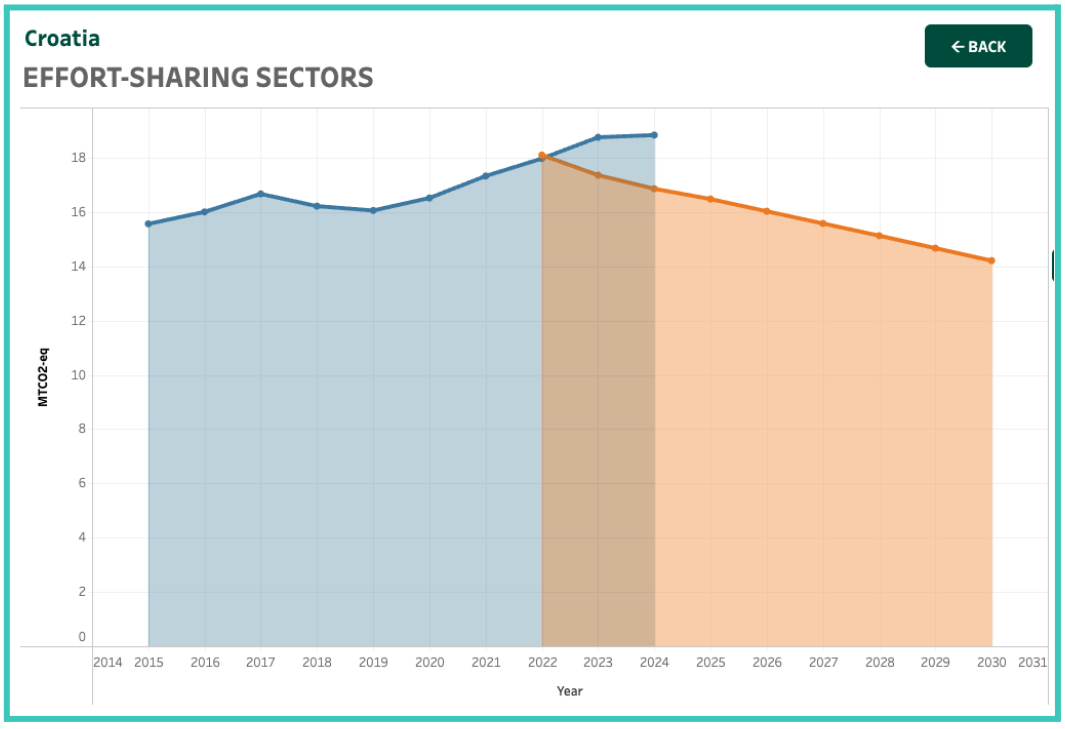
[9] Greece did not include neither a WAM nor WEM scenario. Its emissions, however, are decreasing, and should easily achieve the (extremely unambitious) 2030 ESR national target.

To accelerate mitigation efforts and achieve the EU's climate and energy targets, there is a need for more EU funds allocated to the transition. The 35% of the proposed 2028-2034 budget allocated for climate, the environment, and nature conservation (excluding NGEU repayments) is much less than what would be required to achieve the EU's 2040 target[10].

Consequently, the EU and its Member States should under no circumstances cut the proposed budget. Instead, more EU funds are needed towards the transformation, with more targeted support for low-income Member States. In order for these funds to unlock their full potential, the policy mix that supports decarbonisation of effort-sharing sectors should be protected. As our previous NECP analyses show, where national investments are unclear or insufficient, expected scenarios diverge quickly from reality.

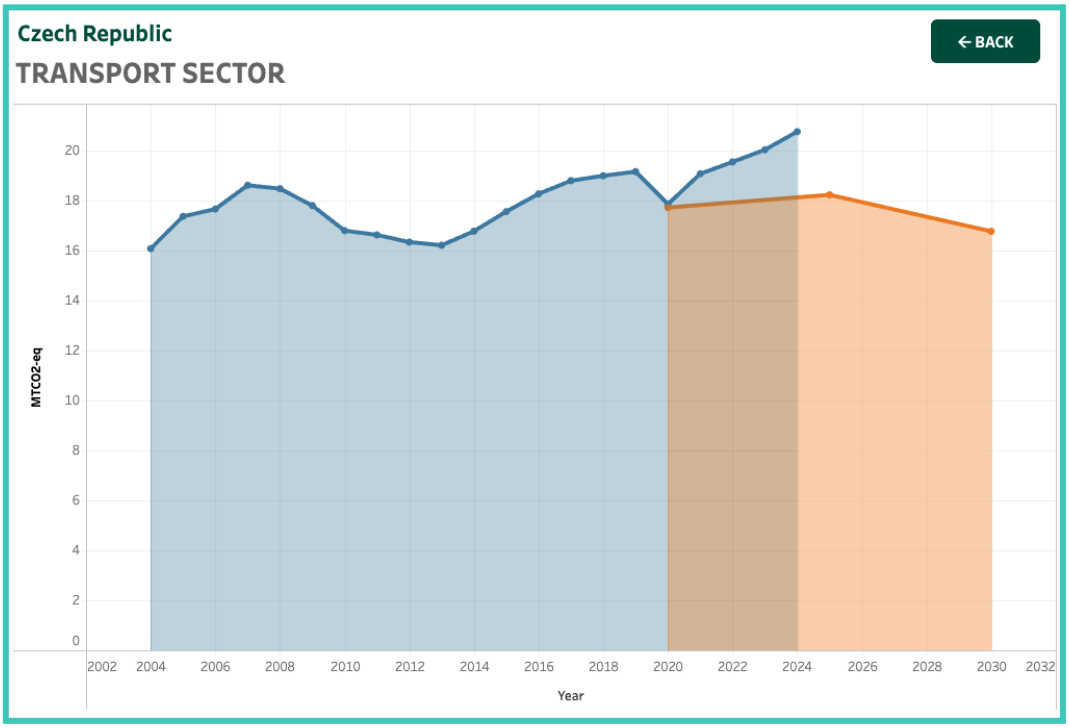
The next EU budget – including the reforms required via the NRPPs – is a critical opportunity to increase investments and direct them towards sectors lagging behind.

Figure 4: Croatia is one of the EU countries where emissions from effort-sharing sectors are not only well above the NECP scenario, but even on the rise. Effort-sharing sectors include: transport, buildings, agriculture, waste and small industry.



[10] In its Impact Assessment for the 2040 target, the European Commission estimates average energy system investment needs at 1,570 billion Euros (in 2025 prices) per year across the 2031-2040 period. According to conservative estimates, at least a quarter of that must come from public sources, of which a minimum of 30% from EU funds. That is at least €124 billion per year – or more than €868 billion over seven years. 35% of the proposed 2028-2034 budget (excluding NGEU repayments) is to be used for climate, the environment, and nature conservation; that corresponds to around €565 billion, leaving a gap of over 300 billion. This gap doesn't even include the investment needs for circular economy, just transition, biodiversity, and adaptation.

Figure 5: Czechia is one of the EU countries where transport emissions are on the rise, and far from being in line with the decarbonisation trajectory expected in the NECP scenario.



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4. In 2024, renewables and energy savings were not advancing fast enough. The post-2030 framework must include binding, ambitious targets, and stronger compliance mechanisms for both.

The renewables picture is one of the most one-sided results in the NECP tracker. In 2024, **the share of renewables in final energy consumption was still increasing in most Member States** covered by the tracker (11 out of 17), with slight decreases only in Belgium and Croatia and stability in four others[11]. **However, this growth is not fast enough** even to match the scenarios Member States themselves set out in their NECPs. In 2024, the renewables share was below the expected NECP scenario in 15 out of 17 countries, with only Bulgaria broadly in line and Estonia performing better than projected. These NECP scenarios are not binding in themselves, but they can provide an indication as to whether Member States are deploying renewables fast enough to provide their respective expected contributions to the overall EU 2030 renewables

[11] A similar trend is visible for the share of renewables in the electricity mix, where renewables continued to grow but remained below planned scenarios in most countries.

target. So far, the signal is not fully positive: renewables are expanding, but not at the pace Member States themselves expected in their own plans.

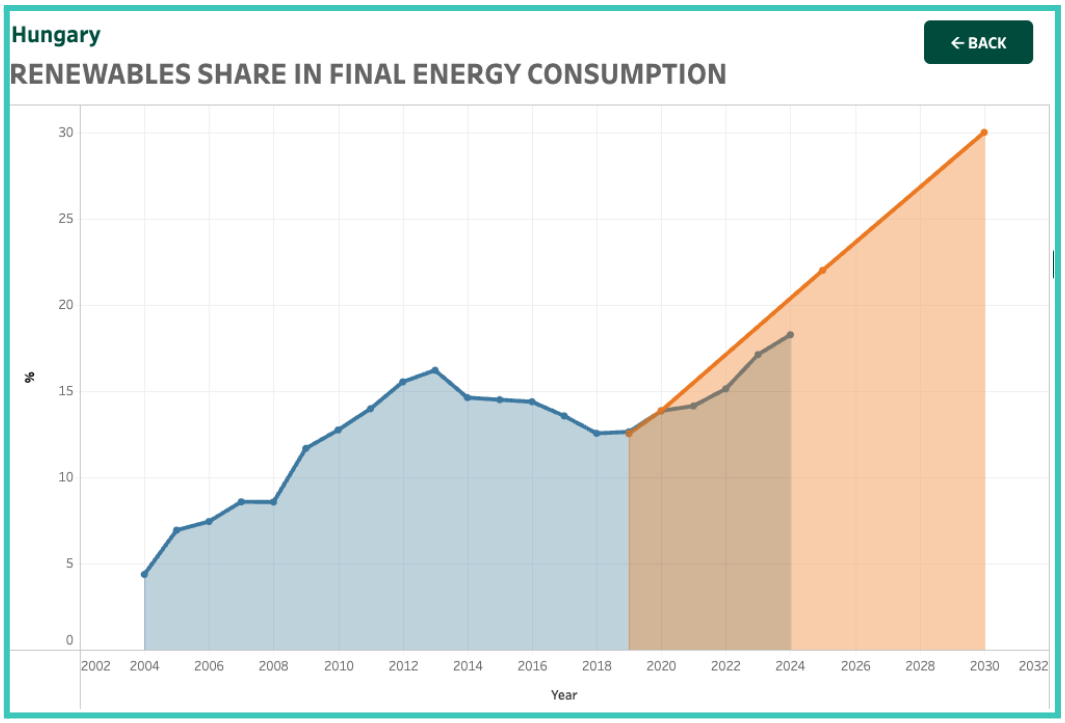
Energy consumption indicators look less alarming at first sight, but this mostly reflects the weakness of planned national scenarios rather than strong implementation. In 2024, around half of the countries in the NECP tracker are in line with their expected path for final energy consumption, with significant gaps concentrated "only" in Croatia, Cyprus, Estonia, Portugal and Spain; values for primary energy consumption confirm this trend (13 out of 17 Member States appear aligned with their respective NECP scenarios, although this comparison is slightly less reliable[12]). The historical trend, however, is much more concerning: **final energy consumption is stagnating or increasing in almost all countries** — 15 out of 17, with only Denmark and Germany reducing it compared with the previous year — while primary energy consumption also increased or stagnated in 10 out of 17. As a result, the same countries can look adequate against their own NECP scenarios while the implementation is still falling short of what is required to meet respective contributions to the overall EU 2030 energy efficiency target.

To reverse the trend, the post-2030 framework should preserve **binding targets for both renewables and energy-efficiency** – and introduce them at national level. This is needed to strengthen commitment, improve accountability and prevent weak national ambition and insufficient implementation. The revised Governance Regulation should also **strengthen compliance** by attaching clearer consequences to missed targets, weak NECPs and ignored Commission recommendations, including through reinforced corrective mechanisms and stronger financial incentives[13].



[12] For the usual reason: several NECP projections do not have the same baseline year values as historical data.
[13] More detailed information is available in CAN Europe's post-2030 energy and climate framework position papers. The list of priorities for the Governance Regulation is available here.

Figure 6: Hungary is one of the EU countries where the share of renewable energy over the final energy mix is progressively increasing, but below the rate expected in the NECP scenario.



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5. NECPs lack both targets and monitoring tools for fossil subsidies and social indicators, such as energy poverty. The revision of the Governance Regulation should address these gaps.

This NECP tracker update covers two new socio-economic indicators: **fossil fuel subsidies** and **energy poverty**. Although far from exhaustive, these indicators offer a useful proxy for the extent to which socio-economic and distributional considerations remain **insufficiently embedded in NECP planning, monitoring and implementation**, despite being explicitly referenced in the NECP template and Commission recommendations. The revision of the Governance Regulation should close both gaps by strengthening the requirements for credible targets and trajectories as well as support harmonised monitoring, to ensure promises turn into policy action.

On **fossil fuel subsidies**, the NECP tracker broadly confirms[14] the picture presented in the European Commission's latest energy subsidies report: in most countries covered by the tracker, fossil fuel subsidies declined in 2024[15] from the peak reached in 2022 due to Russia's invasion of Ukraine and the consequent fossil crisis, but most remain considerably above pre-spike levels.

Beyond the overall trend, the tracker reveals three structural shortcomings.

First, the EU lacks a **common methodology for defining fossil fuel subsidies**. This is evident in the few cases covered by the tracker (Portugal, Spain and Italy) for which historical figures could be retrieved from NECPs and national inventories. Despite being historical figures (i.e. not projections), they are not comparable with OECD data, reflecting substantial differences in definitions and scope.

Second, **reporting is both incomplete and inconsistent**. Among the NECPs featured in the tracker, national experts confirm that reporting on fossil fuel subsidies is either fully absent (7/13) or weak (6/13). When it exists, information available in national inventories (Belgium and Italy) or other reporting processes (Germany and Spain) can be outdated, partially or fully omitted from NECPs or presented in ways that hinder public scrutiny and EU-wide monitoring (Czechia and Estonia).

Third, and perhaps most importantly, **ambition is largely missing**. Clear national roadmaps for phasing out fossil fuel subsidies are almost absent from the NECPs, and concrete end dates are virtually non-existent. When phase-down is mentioned, it is not translated into credible milestones or backed by credible policies.

The revision of the Governance Regulation should establish a robust EU framework for phasing out fossil fuel subsidies.

First, it should identify a harmonised definition, covering both explicit and implicit subsidies. Second, it should require Member States to report regularly and transparently on each measure's value, duration and objectives through a dedicated section of the NECP template. Third, Member States should set binding phase-out deadlines, interim milestones and supporting policies. Finally, progress reports should track implementation, backed by effective Commission enforcement where reporting or delivery is insufficient.

[14] Based on OECD data, which do not cover Bulgaria or Cyprus as neither country is an OECD member.

[15] The only countries where subsidies fell to pre-spike levels were: Belgium, Denmark, Estonia and Greece. On the other hand, Croatia stands out as a negative exception where subsidies are not decreasing compared to 2022.

On **energy poverty**, the tracker identifies similar shortcomings, consistent with previous NGO assessments.

First, on **definitions and measurement**. Although the EU has established a common definition of energy poverty in the Social Climate Fund legislation and proxy indicators through the Energy Poverty Advisory Hub (EPAH), most Member States assessed (9 of 13) use none of the common EPAH indicators in their NECP monitoring or objectives, including the two selected for the tracker: arrears on utility bills and inability to keep homes adequately warm[16].

Second, national experts rated **energy poverty reporting** as weak in most cases (10 of 13). While several NECPs include dedicated chapters, they lack comprehensive monitoring frameworks with clear baselines, quantified indicators and measurable milestones (Croatia, Cyprus, Poland, Portugal and Slovenia), clear policies and measures (Italy), or consistent information (Belgium, Estonia and Spain).

Third, most NECPs **lack targets and trajectories** for reducing energy poverty (10 of 13). Even where these exist (Portugal, Slovenia and Spain), national experts question whether the supporting policies and measures are robust enough to deliver them.

The revision of the Governance Regulation should strengthen the EU framework for reducing energy poverty, and fundamentally shift how Member States address the just transition in the NECP process – moving from a compliance exercise to a strategic planning tool.

This requires, first, clear, common and comparable just transition objectives, including for energy poverty; second, adequate technical, administrative and financial resources for integrated planning; and third, stronger assessments of the distributional and socio-economic impacts of climate, energy and social measures, supported by gender-disaggregated data.



[16] These two EPAH indicators were selected to feature in the tracker as they were the most used by Member States in their NECPs. Nonetheless, only 4 countries mention them in their NECPs – and only 3 of them (Italy, Portugal, Slovenia) use them to set trajectories.

Figure 7: Portugal is one of the EU countries where the national accounting of fossil fuel subsidies (light blue) exists, but is incomplete, as shown by the stark discrepancies with OECD data (dark blue).

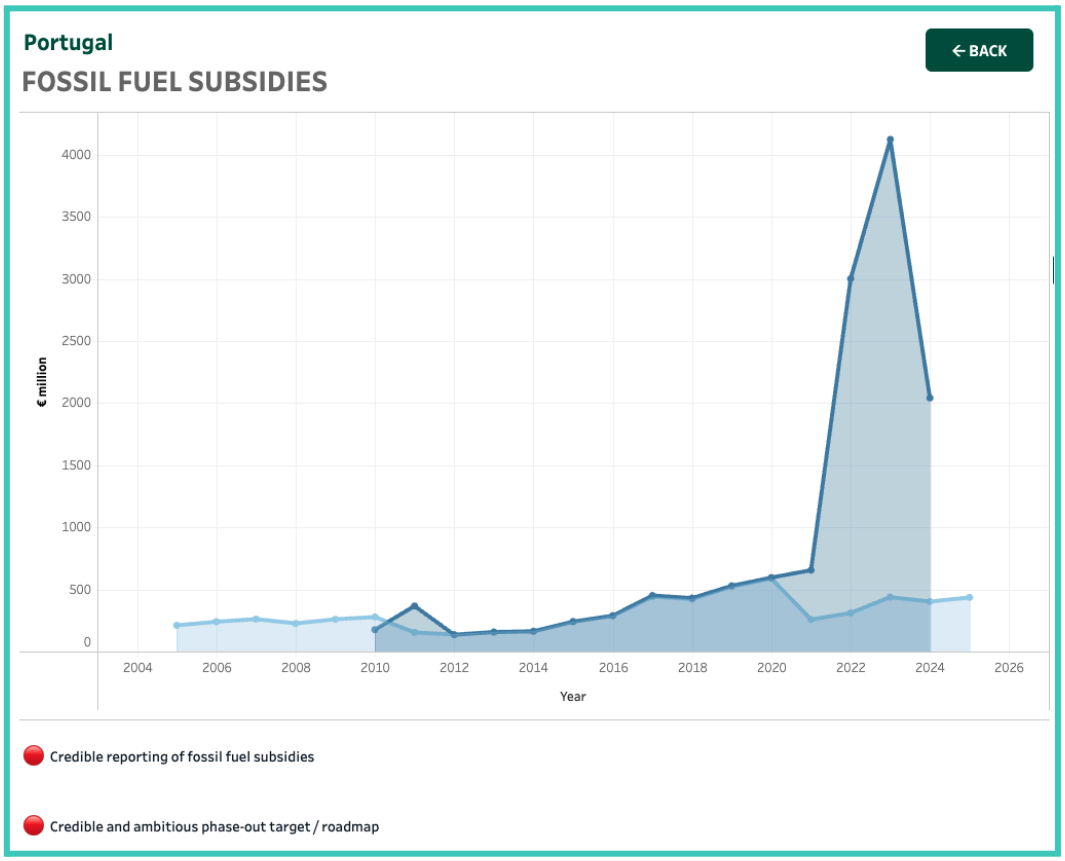


Figure 8: Bulgaria is one of the many EU countries that lack sufficient data, as well as credible reporting and ambitious targets, for energy poverty



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Annex – NECP tracker methodology and sources

This briefing, based on the 2026 NECP tracker update, focuses on the ongoing **implementation of NECPs**. Notably, the assessment compares the latest historical data available at EU level with the scenarios set by Member States in their NECPs.

- EU-level **historical data** is available up to 2024 – except ETS emissions, for which data are already available up to 2025. The data has been gathered from official sources such as the European Environmental Agency (EEA), Eurosat, the OECD and the EU Energy Poverty Advisory Hub (EPAH).
- **NECP data** has been gathered or derived from each country's final updated NECPs, all of which are available on the European Commission's website.

For climate and energy indicators, this briefing specifically refers to NECP scenarios based on additional measures (WAM scenarios), and scenarios based on existing measures (WEM scenarios) where WAM are not available.

We have prioritised the comparison against NECP's expected pathways (WAM/WEM scenarios), rather than against the NECP targets, for the following reasons:

- WAM/WEM scenarios provide annual values, i.e. they are comparable with 2024 historical data, whereas NECP targets typically refer only to 2030;
- While not being binding political commitments, WAM/WEM scenarios reflect the real level of ambition of the plans, as they are derived from the policies and measures actually included in the NECPs.

For social indicators, this briefing looks at NECP scenarios and objectives for energy poverty and fossil fuel subsidies. Due to large deficiencies of quantitative data, it also builds on qualitative traffic-light assessments conducted by national experts.

A comprehensive list of sources is available here below. More information regarding specific countries or indicators is available directly on the NECP tracker tool: explanations and sources are available below each graph.

Climate indicators

Historical data – For climate indicators, the European Environmental Agency (EEA) was used as the main data source. The specific datasets used are the following:

- For gross, net, LULUCF and sectoral emissions (1990-2024), last modified in May 2026: https://www.eea.europa.eu/data-and-maps/data/dataviewers/greenhouse-gases-viewer
- For emissions in ETS sectors (2005-2025), last modified in July 2026: https://www.eea.europa.eu/en/analysis/maps-and-charts/emissions-trading-viewer-1-dashboards
- For emissions in ESR sectors (2005-2024), last modified in March 2026: https://www.eea.europa.eu/en/datahub/datahubitem-view/e9ce7eb8-8439-4f2f-96f8-279a36c5fa7a

NECP data – With "NECP data", we refer to all scenarios and targets that Member States have set for themselves in the final updated NECPs. All final updated NECPs, submitted by Member States between 2024 and 2025, are available on the website of the European Commission: https://energy.ec.europa.eu/strategy/energy-union/national-energy-and-climate-plans_en.

For climate indicators, both (1) WEM and WAM scenarios, including at the sectoral level, and (2) 2030 targets for Effort-Sharing sectors and the LULUCF sector ("NECP targets"), were extracted or derived from the final updated NECPs. The latter are not considered in this briefing but are available in the NECP tracker.

Extracting data for WEM and WAM scenarios and NECP targets is not always straightforward. Inconsistencies may arise, for which an explanation is provided below each graph. NECP data available in the tracker is based on / checked against the following sources:

- Internal calculations of the Plan4Climate national experts based on the final updated NECPs;
- The European Commission's own calculations, available in the respective country-specific assessments (available on the same NECP website);
- The yearly NECP analysis conducted by the European Climate Neutrality Observatory (ECNO): https://climateobservatory.eu/sites/default/files/2026-05/AmbitionGap_Briefing_Update2026_1.pdf

EU targets – With "EU targets," we refer to all binding 2030 national targets set in EU law. For climate indicators, the two relevant targets concern the Effort-Sharing sectors

and the LULUCF sector. These targets are not mentioned in this briefing but are available in the NECP tracker.

- The targets for **Effort-Sharing sectors** were retrieved from the Effort-Sharing Regulation (Annex I) and calculated in absolute values using the 2005 historical data baseline used by the European Commission in the "*EU wide assessment of the draft updated National Energy and Climate Plans*" (Annex 1, Table 1);
- For **LULUCF net removal targets**, the value is calculated by adding the binding relative target (Annex IIa, column C of the LULUCF regulation) to a 2024 baseline, retrieved in the Environmental Energy Agency dataset. These values do not correspond to the official list of national 2030 net removal objectives of the LULUCF Regulation (2023/839), which are based on an older 2020 baseline and therefore are now obsolete.

Energy indicators

Historical data – For energy indicators, Eurostat was used as the main data source. The specific datasets used are the following:

- For renewables indicators (2004-2024, excluding provisional data for 2025), last modified in September 2026: https://ec.europa.eu/eurostat/databrowser/view/nrg_ind_ren__custom_22948094/default/table
- For energy efficiency indicators (2005-2024), last modified in April 2026: https://ec.europa.eu/eurostat/web/energy/database/additional-data#Energy%20balances

NECP data – With "NECP data", we refer to all scenarios and targets that Member States have set for themselves in the final updated NECPs. All final updated NECPs, submitted by Member States between 2024 and 2025, are available on the website of the European Commission: https://energy.ec.europa.eu/strategy/energy-union/national-energy-and-climate-plans_en.

For energy indicators, both (1) WEM and WAM scenarios, and (2) 2030 targets for Renewable energy, Final energy consumption and Primary energy consumption ("NECP targets"), were extracted or derived from the final updated NECPs. The latter are not considered in this briefing but are available in the NECP tracker.
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- The yearly NECP analysis conducted by the European Climate Neutrality Observatory (ECNO): https://climateobservatory.eu/sites/default/files/2026-05/AmbitionGap_Briefing_Update2026_1.pdf

EU benchmarks – With "EU benchmark," we refer to 2030 national benchmarks indicated in EU law. These benchmarks are not binding, but indicate each Member State's expected contribution required to achieve the EU-wide 2030 targets for renewables (share of renewable energy over final energy consumption) and energy efficiency (Final energy consumption and Primary energy consumption). These benchmarks are not mentioned in this briefing but are available in the NECP tracker.

- The **renewables** benchmarks were retrieved from Annex I to the Commissions Communication COM(2023) 796, EU wide assessment of the draft updated National Energy and Climate Plans, Table 2; they are based on the formula set out in Annex II of the Governance Regulation;
- For the **energy efficiency**, (1) the corrected contribution by the European Commission (for final energy consumption) and (2) the least ambitious result of the formula (for primary energy consumption) of the 2023 Energy Efficiency Directive recast (Annex I, Table 13: EU Reference Scenario 2020 & updated EU Reference Scenario 2020) were used as the EU minimum benchmarks.

Social indicators

Historical data – For social indicators, two different sources were used for historical data.

- For **energy poverty**, we have retrieved data for both "inability to keep home adequately warm" and "arrears on utility bills" from the EU Energy Poverty Advisory Hub (2004-2025):

https://energy-poverty.ec.europa.eu/epah-indicators?indicator-inability+tkphmdqt+warm-eurostat+households-total-none-country-all+indicators-2025

- For **fossil fuel subsidies**, we have retrieved data from the OECD Data Explorer dataset (2010-2024, including preliminary data for 2024), last modified in December 2025: https://data-explorer.oecd.org/vis?fs[0]=Topic,1%7CTrade%23TRD%23%7CTrade%20policy%23TRD_POL%23&fs[1]=Topic,3%7CTrade%23TRD%23%7CTrade%20policy%23TRD_POL%23%7CSubsidies%20and%20government%20support%Fossil%20fuel%20support

NECP data – With "NECP data", we refer to all scenarios and objectives Member States have set for themselves in the final updated NECPs. All final updated NECPs, submitted by Member States between 2024 and 2025, are available on the website of the European Commission: https://energy.ec.europa.eu/strategy/energy-union/national-energy-and-climate-plans_en.

When it comes to social indicators, we therefore refer to targets or objectives available in the NECPs concerning energy poverty and fossil fuel subsidies. While some commitments exist, they are in most cases difficult to assess, monitor and compare (i.e. different units of measurement are used by different countries). As a consequence, below its social indicators, the NECP tracker includes traffic-light qualitative assessments for both energy poverty and fossil fuel subsidies phaseout plans, conducted by national experts of the Plan4Climate consortium. The traffic-light assessment is based on the following qualitative questions:

- For fossil fuel subsidies:
    - Does the NECP include a credible reporting of fossil fuel subsidies? Does your country have an updated national inventory mentioned in the NECP?
    - Does the NECP Include a credible and ambitious target or roadmap for fossil fuels subsidies reduction/phase out?
- For energy poverty:
    - Does your country have credible *reporting* on energy poverty in the NECP?
    - Does your country have an ambitious and credible energy poverty target in the NECP?

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