

NATIONAL ENERGY & CLIMATE PLANS:



3 key elements for effective delivery

The National Energy & Climate Plans (NECPs) are the key instrument to drive the energy transition. On paper they look good for renewables: the EU Commission says the commitments add up to 33% renewable energy by 2030, just above the EU target. But countries will only deliver their commitments if their policies are right. 3 issues are key:

- **Auctions.** Giving visibility of how much renewable energy will be auctioned and when, and designing auctions right;
- **Electrification.** Driving the electrification of heating, transport and industry, crucial to increasing demand for renewables; and
- **Permitting.** Making it easier to get permits for new wind farms and to repower existing ones.

The NECPs are meant to set out clear measures in all 3 areas. The Plans that do this well will attract the most investments. This infographic shows our assessment of how well they do it. We first look at the EU as a whole. And then 12 individual countries.



EU

AUCTIONS

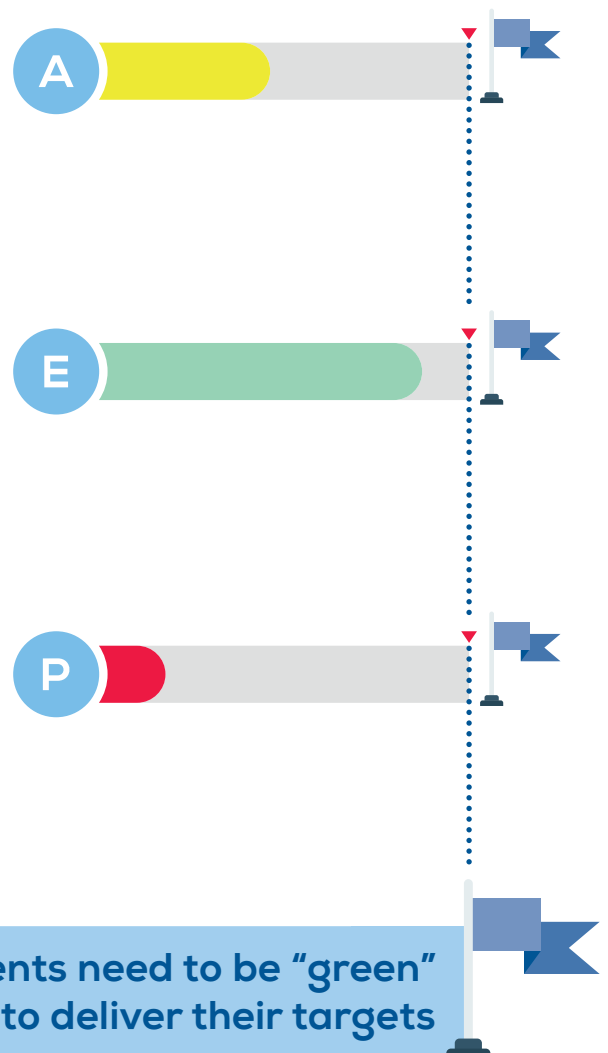
How clear and visible is the forward schedule of renewables auctions? Do the auction volumes deliver the 2030 commitments? Is the auction design right - does it offer stable revenues? 2-sided Contracts for Difference are the best model for this.

ELECTRIFICATION

How well do the Plans push the electrification of heating, transport and industry? Electricity is only 23% of the EU energy mix today. The rest is heavily fossil-fuel dominated. We have to electrify as much of it as possible. And this will help drive demand for renewables.

PERMITTING

Will the Plans help simplify the rules and processes for getting permits for wind farms? The current system is too complex and slow - and won't deliver 33% renewable energy by 2030. This is an issue both for new wind farms and the repowering of existing ones.



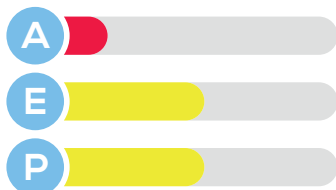
LEGEND

- Measures are good
- Measures are included with detail but insufficiently clear or ambitious to help achieving the 2030 targets
- Measures are absent or lacking in detail

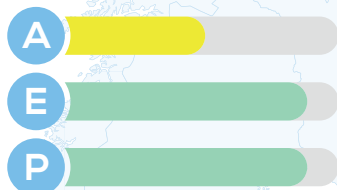
All 3 elements need to be "green" for the plans to deliver their targets

Below we look at 12 countries and the measures outlined in their NECPs for auctions, electrification and permitting. Remember, this is not about the commitments they've made on renewables volumes or any targets they've set. It's about whether the detailed policies in their Plans will deliver their targets and commitments.

BELGIUM



DENMARK



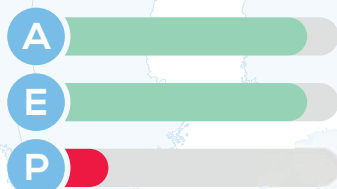
ESTONIA



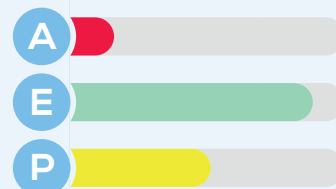
FRANCE



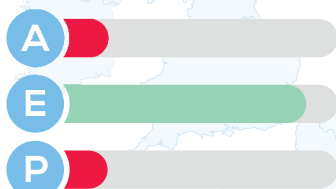
GERMANY



GREECE



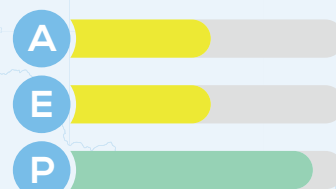
ITALY



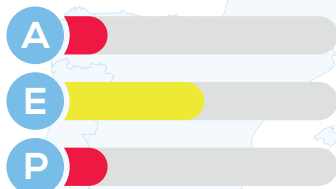
LITHUANIA



NETHERLANDS



POLAND






PORTUGAL



SPAIN



LEGEND

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NOTE:

Situation as of April 2021.