



The state of national cycling strategies in Europe (2022)

2nd edition



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Authors

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

Noa Muste, Policy Intern

Editors

Cian Delaney

Dalila Ferrari

Michael Brennan

Design

Omer Malak

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Executive summary

This report, the second of its kind, provides a comprehensive overview of the status of national cycling strategies in 44 European countries, at a time of growing political interest across the continent in cycling as a sustainable and healthy mode of transport.

With the adoption of the Pan-European Master Plan for Cycling Promotion in May 2021 under the umbrella of WHO/Europe and the UN Economic Commission for Europe, 54 countries in the pan-European region are now politically bound to develop and implement strategies to develop cycling at their national level by 2030. With data from 44 European countries, ECF's analysis shows that most countries have a long way to go if they are to reach this objective.

Developing a national cycling strategy is not a new policy instrument; the Netherlands “invented” it in 1990, followed by the UK in 1996, Germany in 2002 and the Czech Republic in 2004. Yet still, the majority of European countries have never developed a cycling strategy or similar policy document, not to mention implementing one. Of the 44 European countries covered by this report, 20 have at some point adopted a national cycling strategy (NCS). Cycling or similar strategies are currently in force in only 14 of these countries, while they have expired and therefore need updating in the other six, including in the cycling nation of Denmark. Italy is the only country that adopted a first NCS in 2022. Of the remaining 24 countries analysed in the report, eight are currently in the process of developing a national cycling strategy for the first time.

To reach the 2030 objective set by the Pan-European Master Plan for Cycling Promotion, many countries must urgently begin the process of developing or renewing their national cycling strategy. Most of the countries that have never had a cycling strategy – and are not currently in the process of developing one – are located in the Balkans, Eastern Europe and the Caucasus. In 2020, however, an important project has been set up with the incentive to increase cycling through national cycling plans in the Danube region called “Danube Cycle Plans”. Most of these strategies are set to be adopted in 2023.

While national cycling strategies can be instrumental in the development of cycling in a country, the scope and duration of such strategies differ widely. Some of the most popular measures pursued by countries include the promotion of intermodality, legal changes to highway codes and the development of a national cycle route network. The duration of most strategies either correspond to the term of the government or last about ten years to allow for a more long-term vision, with an outlier in the 25-year strategy of Northern Ireland.

The findings in this report will provide a benchmark against which ECF intends to continue publishing annual update reports to track progress on the development and implementation of national cycling strategies in Europe towards 2030.

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Introduction

In May 2021, the Pan-European Master Plan for Cycling Promotion was adopted at the Fifth High-level Meeting on Transport, Health and Environment. Part of the Vienna Declaration, it is the first officially adopted supranational document on cycling policy transcending the EU.

The master plan's main purpose is to politically acknowledge the growing importance of cycling in transport and give guidance at a national level on how to support cycling across respective countries through central government policies. Covering 54 countries, including all 27 EU member states, it was developed under the umbrella of the Transport, Health and Environment Pan-European Programme (THE PEP), which was coordinated by WHO/Europe and UNECE (United Nations Economic Commission for Europe) and co-chaired by Austria and France. The European Cyclists' Federation (ECF) actively contributed to the development of the cycling master plan since its inception in 2014.

The key objective (part I) of the master plan is very ambitious: "To significantly increase cycling in every country to contribute to the overall target of doubling cycling in the region as a whole" by 2030. To that end, the plan says that **all countries by 2030 will have to develop and implement a national cycling policy.**

Up until ECF's first report published in January 2022, no comprehensive analysis had been done of which countries in the UNECE region have a national cycling strategy, or a similar document, already in place. Analysing data from 44 of the 54 master plan countries, the main purpose of ECF's series of reports is to fill this gap.

The strategies identified in this report are categorised by the number of their iteration as well as their scope and duration, and more detailed country reviews describing the details of each national cycling strategy are provided where applicable. A new sub-chapter on central government investments was added for the first time. This 2nd edition also looks at the wider policy framework by highlighting the process of global/international and European policies, including Nationally Determined Contributions (NDC)¹, National Energy and Climate Plans² (NECP) and COVID-19 National Recovery and Resilience Plans (NRRP)³, with the exception of investments.

ECF intends to publish annual update reports to track progress on the development and implementation of national cycling strategies towards 2030.

¹ <https://unfccc.int/ndc-information/nationally-determined-contributions-ndcs>

² <https://ecf.com/news-and-events/news/cycling-underrepresented-eu-member-states%E2%80%99-final-national-energy-and-climate>

³ <https://ecf.com/news-and-events/news/final-analysis-cycling-becomes-mainstream-eu-member-states-covid-19-recovery>

1. What is a national cycling strategy?

A national cycling strategy is a multi-year plan that establishes a **global vision** aimed at coordinating **policies, objectives and actions for cycling**. It sets clear interventions, instruments and precise goals for the development of cycling at the national level. In short, a national cycling strategy ideally consolidates all policies taken at national level in support of cycling, thereby sending a political signal that **cycling matters** and that it should therefore be supported systematically by public authorities, businesses, academia and civil society organisations.

To be qualified as a national cycling strategy, these core criteria need to be fulfilled:

- Be a strategic policy document about the national government's vision on cycling (or active mobility) and be politically adopted (minister; or government; or parliament⁴).
- Include targets/objectives that describe what the strategy aims to achieve.
- Put forward a catalogue of concrete actions/activities/measures (within a given timeframe) to achieve said targets.

In order to be qualified as a “good” and impactful national cycling strategy, additional criteria need to be addressed:

- **Why:** Benefits of cycling
- **For whom:** Focus on different facets/target groups of cycling (urban/rural, transport, recreation, tourism; children, commuters, woman, elderly, etc.)
- **What:** SMART Targets/Objectives (Specific, Measurable, Achievable, Realistic and Timely)
 - Double the number of cycle trips by 2030; reduce cycle fatalities by 50% by 2030.
 - Output indicators: build x km of cycle paths by 2030.
- Undertake an in-depth analysis of resources needed to achieve targets.
- **How:** Actions/measures: Good mix of hardware, software and orgware
 - Hardware:
 - Infrastructure investments (e.g., in EuroVelo and national cycle route network, bicycle parking at railway stations)

⁴ Cycling strategies can be adopted at very different political levels: The “weakest” level being by one minister/ministry only. Typically, this would be the transport ministry, but it does not need to be. In order to ensure cross-departmental coordination and implementation, a preferred option is to have the entire government officially backing the strategy. Ideally, the strategy is also discussed in the national parliament where it finds endorsement and support. In some cases, a cycling/active mobility act has been adopted.

- Co-funding for local and regional authorities (e.g., for developing their own cycle route network)
- Software: Regulations (e.g., infrastructure quality standards, cycle-friendly highway codes, bicycle parking in building codes); education, training, awareness-raising
- Orgware:
 - Cross-departmental coordination; allocation of responsibilities; adequate human resources
 - Stakeholder participation throughout the process (development, implementation, monitoring and evaluation)
 - Capacity building (providing training and education for local and regional authorities)
- The measures should be clearly scheduled and budgeted
- Monitoring and evaluation.

More detailed information about the nature of national cycling strategies can be found in these documents.

- Vrtalová Martinek: Danube Cycle Plans. Guidelines on how to set up a national cycling plan, 2021.⁵
- UNECE/WHO: The Pan-European Master Plan for Cycle Promotion, 2021.⁶
- ECMT, National Policies to Promote Cycling. Organization for Economic Cooperation and Development (OECD), Paris, 2004.⁷

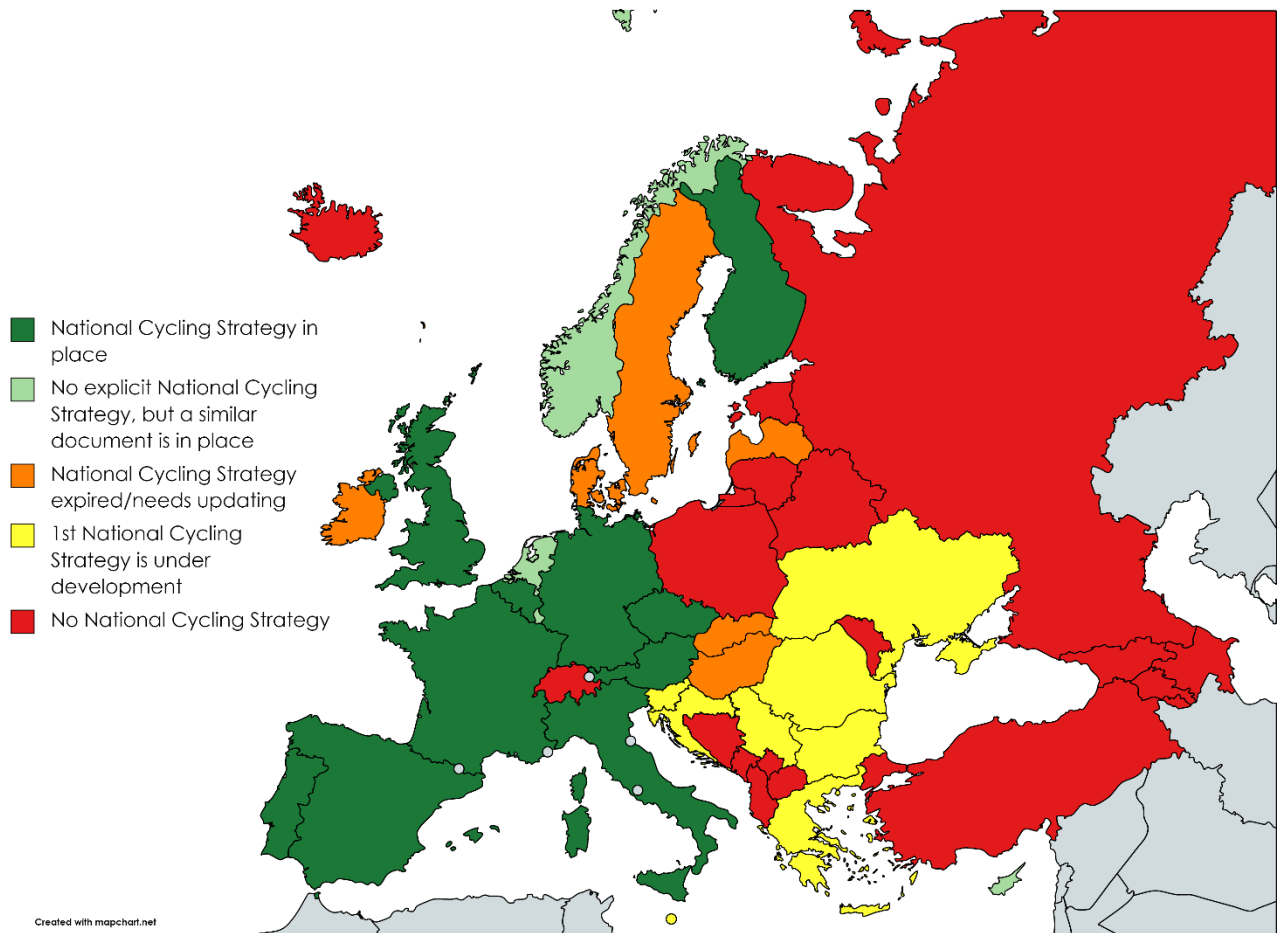
⁵ https://www.interreg-danube.eu/uploads/media/approved_project_public/0001/44/f8ecf58fffeb4f347bd9df73f96a208677bf4d73.pdf

⁶ https://thepep.unece.org/sites/default/files/2021-06/MASTERPLAN_2021-05-20-II_BF%203%20June_0.pdf

⁷ <http://www.internationaltransportforum.org/pub/pdf/04Cycling.pdf>

2. Overview of the state of national cycling strategies

2.1 The state in 2022



Compared to our first report published with data from 2021, these new developments are the main ones to highlight:

- Italy adopted its first ever national cycling strategy in 2022.
- England published “The second cycling and walking investment strategy” (CWIS2).
- France published its new “Cycling and Active Mobility Plan 2022-2027”.
- Luxembourg adopted its new “National mobility plan 2035”, with a dedicated section on cycling.
- The Czech Republic adopted its “Concept for Urban and Active Mobility 2021-2030”.
- In the Netherlands, the state secretary of infrastructure and water management issued an official letter to the parliament’s second chamber concerning cycling ambitions for the future in the Netherlands. This initiative does not constitute a proper national cycling strategy, but it still worth mentioning. A new budget line for cycling was also announced for the years 2022-2025.

- Finland was added to the list of countries having a national cycling strategy in place. This situation applied already in 2021 but was misstated in our 2021 report.
- Malta published a blueprint for a national cycling strategy in 2018 but has still not adopted an official strategy. It therefore changed from green colour to yellow.

A total of 20 European countries now have (or have had) a national cycling strategy or similar policy document in place. Of these, six have expired, many of which at the end of 2020, and now need updating. Hungary and Slovakia are advancing in that process and are set to be adopting their new national cycling strategy in 2023.

Eight countries that have not adopted a strategy yet are in the process of adopting their first one.

National Cycling Strategy (NCS)	Countries
NCS in place (10) [UK countries are counted only as one entity⁸]	Austria, Belgium, Czech Republic, Finland, France, Italy, Germany, Portugal, Spain, England (UK), <i>Scotland (UK)</i> , <i>Northern Ireland (UK)</i> , <i>Wales (UK)</i>
No explicit NCS, but a similar document is in place (4)	Cyprus, Luxembourg, Netherlands, Norway
NCS was in place, but has expired and needs updating (6)	Denmark, Hungary, Ireland, Latvia, Slovakia, Sweden
First NCS under development (8)	Bulgaria, Croatia, Greece, Malta, Romania, Serbia, Slovenia, Ukraine ⁹

⁸ The UK consists of four countries: England, Northern Ireland, Scotland and Wales. While the UK in 1996 issued a national cycling strategy which applied to the three countries constituting Great Britain (England, Scotland and Wales), following [devolution](#) and the significant broadening of autonomous governance throughout the UK in the late 1990s, countries are now in charge of their own mobility policies. Since the UK as a whole counts as one member state to the UNECE/WHO Europe, we also can only allocate one number to the UK. As England is by far the largest entity among the four countries (around 85 % of population), the number we allocate follows the English situation.

⁹ In our first edition published in January 2022 we had marked Ukraine as developing a National Cycling Strategy. With the Russian invasion of the country on 24 February 2022, we assume that this work has been put on hold.

No NCS (16)	Albania, Armenia, Azerbaijan, Belarus, Bosnia and Herzegovina, Estonia, Georgia, Iceland, Lithuania, Moldova, Montenegro, North Macedonia, Poland, Russia, Switzerland, Turkey
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The **United Kingdom** is a special case as it does not have one national strategy anymore, but the single countries (England, Wales, Scotland and Northern Ireland) do. **Belgium** only adopted its first federal strategy in 2021; until then, only its regions (Flanders, Brussels-Capital Region and Wallonia), which have far-reaching competences on cycling policies, had adopted one.

Switzerland introduced “cycling” into its constitution through a referendum in 2018, which gives the federal level competence on cycling. A federal act on cycle routes will mandate cantons to develop cycle route networks, however an encompassing national cycling strategy has yet to be developed.

Other countries have a substitute national cycling strategy. For instance, **Norway** does not have a cycling strategy as such, but has set some cycling targets in its “National Transport Plan 2014-2023”. The same applies to **Luxembourg** which adopted “National Mobility Plan 2035” in 2022. **Czech Republic** adopted a mobility plan called “Urban and Active Mobility Concept” in 2021 which also includes cycling. The **Netherlands**, despite being the first European country to have had a national cycling strategy in the 1990s, does not have a genuine national cycling strategy either, but various stakeholders have come together in the “Tour De Force” and developed a joint document. In July 2022, the State Secretary for the Ministry of Infrastructure and Water Management issued an official letter to the parliament’s second chamber concerning cycling ambitions for the future in the Netherlands. The plan is called “Nationaal Toekomstbeeld Fiets”, which translates as “National Vision Cycling”, and collaborates with the Tour de Force.

Others such as **Bulgaria, Croatia, Romania, Slovenia and Serbia** are partners of the Interreg Programme “Danube Cycle Plans”,¹⁰ a project that aims to facilitate the development of cycling policies at national and transnational levels based on a common transnational “Danube Cycling Strategy.” These countries are expected to adopt a first national cycling strategy in 2023.

In this report’s first edition, Ukraine was also marked as yellow. Due to the war, any developments are surely put on hold.

Estonia, Iceland, Lithuania, Poland, Switzerland, as well as most non-EU/EEA countries in Europe, still do not have their own national cycling strategies.

¹⁰ Details available at: <http://www.interreg-danube.eu/approved-projects/danube-cycle-plans>

2.2 Duration of the strategies

National cycling strategies can differ widely in terms of duration. Quite a few typically align it with a government's term (usually 4-5 years). Several countries opt for periods of about ten years, hereby setting a long-term vision and goals going beyond the immediate government term, with Northern Ireland being an outlier by opting for a 25-year period (2015-2040). However, we also identified national strategies without a clearly defined time horizon.

Up to 5 years	6 - 8 years	~ 10 years	>10 years	Not determined
Belgium Cyprus Finland Italy Latvia Netherlands Slovakia England (UK) Spain	France Hungary <i>Scotland (UK)</i>	Austria Czech Republic Germany Ireland Norway Portugal	Luxembourg <i>Northern Ireland (UK)</i>	Denmark Sweden <i>Wales (UK)</i>

2.3 Iterations of strategies

While England and Scotland are already on their fourth and fifth national cycling strategy, respectively, the majority of countries are still on their first iteration. This underlines that national frameworks for cycling policies are still rather new policy instruments as a whole.

First strategy	Second strategy	Third strategy	Fourth strategy	Fifth strategy
Belgium Croatia Cyprus Finland	Denmark Netherlands <i>Wales (UK)</i>	Austria Czech Republic France Germany	England (UK) Luxembourg	<i>Scotland (UK)</i>

Hungary		Sweden		
Ireland				
Italy				
Latvia				
Norway				
Portugal				
Slovakia				
Spain				
<i>Northern Ireland (UK)</i>				

2.4 Some characteristics of national cycling strategies

The **framework** set by national cycling strategies ideally refers to the coordination of cycling policies (across vertical and horizontal government authorities) towards some **specific targets** – the most common being, for instance, the increase in cycling’s modal share and/or kilometres travelled by bicycle, as well as road safety targets such as halving the number of road injuries among people cycling. The plans of Germany and Hungary are particularly impressive for the amount and clarity of targets set (see country review).

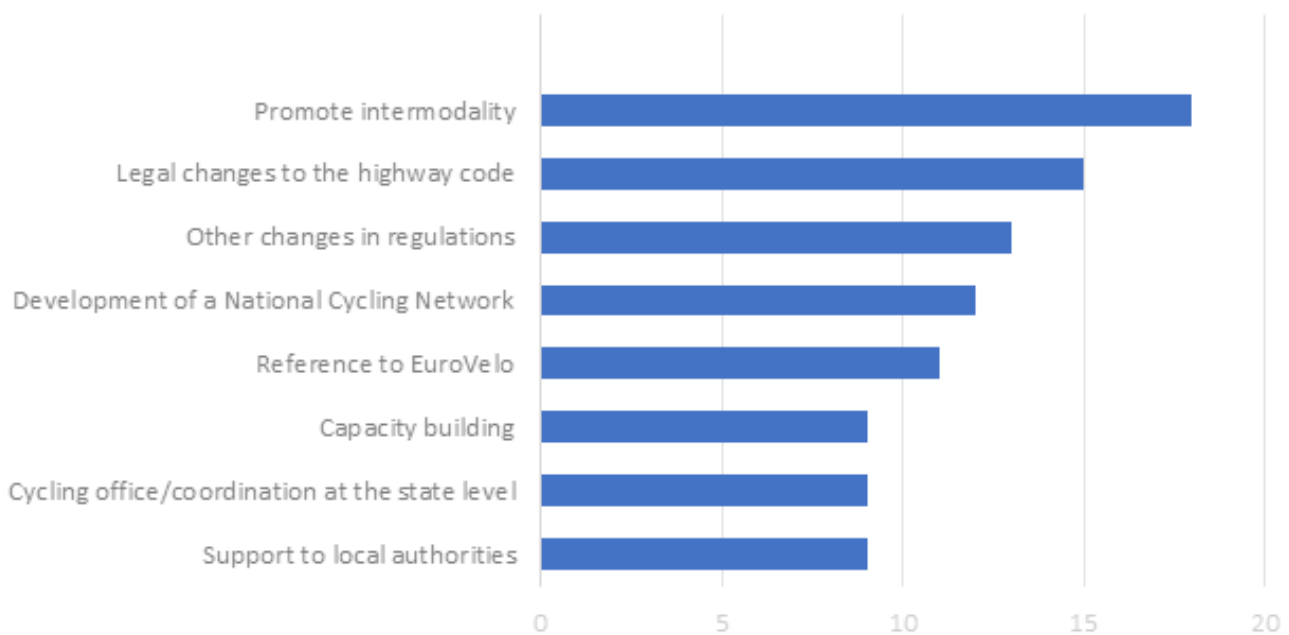
The main recurring content of cycling plans entail:

- The integration of cycling and public transport to promote **intermodality** (e.g., bicycle parking and more accessibility at stations, bicycle carriage on trains and buses).
- The development or expansion of a **national cycle route network**.
- The institution of a “**national cycling officer**” to be the face of the administration on cycling policies.
- The development of **capacity-building** initiatives for local and regional authorities (e.g., a “Bicycle Academy”).
- The funding of **pilot projects**, **research** and **awareness-raising** campaigns (e.g., promotion of national research programmes on cycling).
- The exchange and promotion of **good practices** (institution of annual awards and contests for municipalities, businesses or universities, e.g., “Bicycle Tourism Solution of the Year” in Denmark, the “The German Cycling Award” in Germany or the “Cycle Friendly Campus Award” in Scotland)

- A systematic approach at national level to finance the construction for cycling infrastructure and promotion, with the institution of regular and permanent state **investments**.
- In addition to a general framework for the development of cycling, national cycling strategies can propose for new **legislative** and **fiscal** initiatives to be adopted at the national level. This is particularly relevant for highway codes, taxation policies or fiscal incentives to commute by bicycle. As declared in the German plan, this will create legal certainty and ensure the necessary conditions for more cycling. In particular, it will make it easier for municipalities to set up bicycle lanes. In addition, some plans entail the revision of norms regulating the protection of nature and landscape, to allow the circulation of bicycles in natural areas (e.g., Spain, Hungary and Slovakia).

Other recurring elements that can be seen as common priorities in national cycling strategies in the EU are:

- Improvements in the **production and monitoring of data** on walking and cycling volumes, possibly open source. In fact, as specified in the Finnish plan, without systematic statistics, it is impossible to monitor the achievement of the goals and assess the impact of the measures set in the strategies. For instance, in Germany, “The Bicycle Monitor” regularly provides information on cycling-related topics in the form of a representative survey.
- The **education programmes** addressed in particular to children (cycle-to-school initiatives, inclusion of cycling as an extracurricular subject).
- **Anti-theft measures** (safe bicycle parking, bicycle registration/identification systems managed at the municipal level).



Recurring characteristics of national cycling strategies

Some less common but particularly interesting features are to be found in the French plan, which utilises **technology** and **data** to promote intermodality. With its “Mobility Orientation Law,”¹¹ France plans to make data describing cycle networks, bike sharing, rental and parking in stations and interchange centres available to service providers. These steps, in combination with the increased salience of data relating to other mobility services, aim to promote intermodality. France very likely is also the first European country that published a detailed bicycle industry strategy in 2022, highlighting the economic importance of the bicycle industry as a strategic industry sector, aiming at strengthening the domestic bicycle industry.¹²

With regards to changes in legislation in favour of cycling, an interesting initiative is included in the Portuguese plan. It aims at improving **legislation on working conditions**, guaranteeing better conditions for those travelling by bicycle to the workplace (e.g., mandatory changing rooms and locker rooms for medium and large-sized companies). The Slovak plan recognises the necessity to introduce obligations to design cycle tracks in the case of newly constructed and renovated roads, as well as the obligation for administrative authorities to withhold their approval on any investment project that does not deal with the issue of cycling transport.

¹¹ “La loi d'orientation des mobilités”, details available at: <https://www.ecologie.gouv.fr/loi-dorientation-des-mobilites>

¹² Guillaume Gauffier-Cha (French MP) : Filière économique du vélo. January 2022 <https://www.vie-publique.fr/sites/default/files/rapport/pdf/283777.pdf>

2.5 EuroVelo in National Cycling Strategies

11 EU member states clearly refer to EuroVelo, the European cycle route network, in their national cycling strategies and try to explore opportunities to help develop, promote and benefit from EuroVelo. These member states are Austria, Czech Republic, Denmark, Finland, Germany, Hungary, Italy, Latvia, Luxembourg, Slovakia and Spain. EuroVelo's inclusion in these national cycling plans demonstrate its importance and relevancy regarding the improvement of cycling conditions in Europe.

EuroVelo is the backbone for national and regional cycling networks and a powerful planning tool to demonstrate the need for coherent, prioritised and continuous cycling infrastructure in all type of areas (urban, peri-urban, rural). It also facilitates the cooperation on cross-border cycle routes.

EuroVelo also supports the development of cycling tourism, especially in rural areas. Cycling tourism has proven to be a great way to generate economic benefits, annually contributing over €44 billion to the European economy, as reported by the European Parliament in 2012¹³. Furthermore, the Parliament estimated that the EuroVelo network will create €7 billion of direct revenue every year when fully developed. Multiple countries are catching on to this and want to make use of the potential benefits.

- Germany announced in 2022 that all EuroVelo sections will be signposted as part of the work being implemented on the national cycle route, Radnetze. Germany views cycling tourism as an important factor in regional economic development especially in more rural and economically weaker regions. The strategy wants more Germans to cycle for leisure as well as foreign tourists which they want to achieve by upgrading and expanding the EuroVelo network within Germany.
- Spain is another country that is planning on upgrading and developing its EuroVelo routes, recognising that they are lagging behind other national and regional cycling routes in the country, such as the high-quality “Caminos Naturales” and “Vias Verdes”. One of the strategy's main interventions is dedicated to the design, planning and development of a general network of multilevel cycling routes. These would create and interlink local, regional, state and European (EuroVelo) routes.
- Hungary is planning on developing and maintaining 700 km of new cycling routes both on national and European level. EuroVelo routes sections, especially on EuroVelo 14 – Waters of Central Europe, are included in these plans. The top priorities regarding cycling route

¹³ https://ecf.com/sites/ecf.com/files/EP_study_on_EuroVelo_network.pdf

development, as stated by Hungary, are ensuring more safety, convenience and attractiveness.

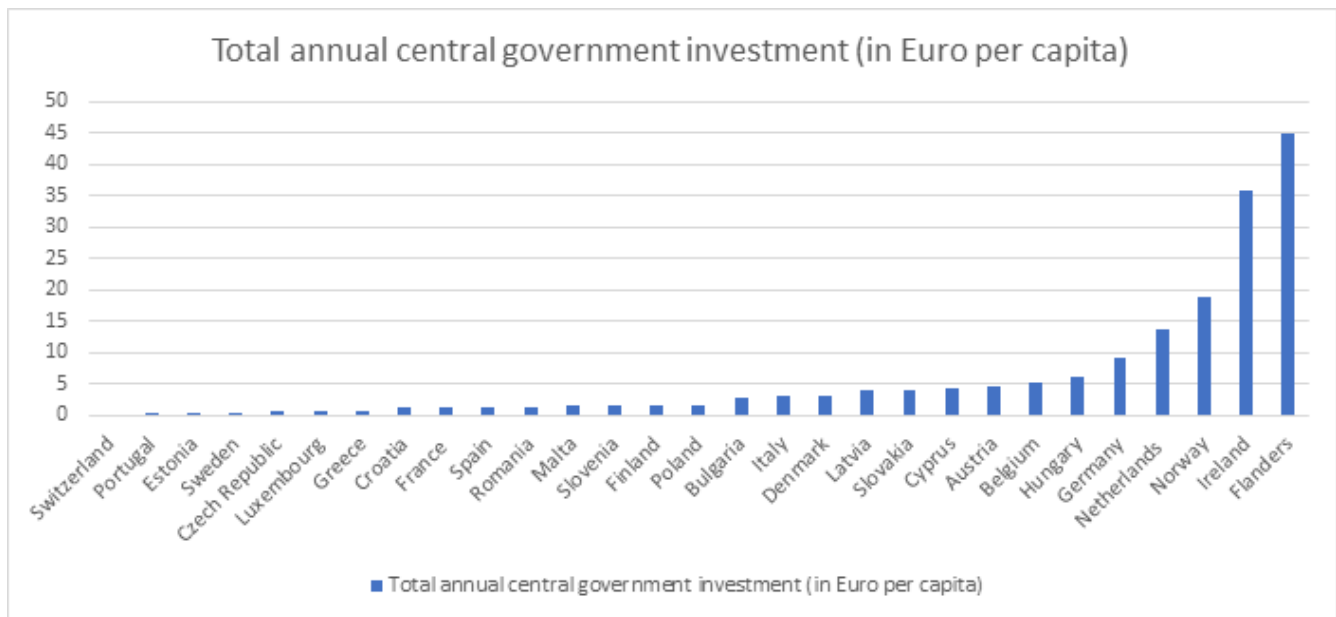
- Austria is applying digital tools in the promotion of EuroVelo routes and plans on integrating EuroVelo 13 – Iron Curtain Trail in its widely used online route planner, “Alpstein”.
- Italy sees EuroVelo as an important component in its national cycling network and is therefore planning to further develop sections of EuroVelo 7 – Sun Route (Verona-Florence), adding 392 km, and on EuroVelo 8 – Mediterranean Route (Venice-Turin), adding 732 km.
- Finland will introduce EuroVelo signposting on its three EuroVelo routes (EuroVelo 10 – Baltic Sea Route, EuroVelo 11 – East Europe Route and EuroVelo 13 – Iron Curtain Trail) which will amount to 5,000 km in total.
- In Latvia, cycling tourism has been an essential part of the national cycling strategy, with the ambitious goal to increase cycling tourism’s share of Latvia’s total tourism offer to 20%. Latvia is planning to develop attractive coastal routes on EuroVelo 10 – Baltic Sea Route to achieve this goal. In addition to this, the state said it will contribute to promoting EuroVelo routes and cycling tourism through its promotional and marketing tools.
- Luxembourg’s national mobility plan aspires to provide cyclists with access to all tourist regions by connecting the regions to long-distance cycling routes like EuroVelo. EuroVelo 5 – Via Romea (Francigena) is crossing Luxembourg.
- France’s national cycling strategy, updated in 2022, includes the objective of being the first worldwide destination for cycling tourism, though not explicitly referring to EuroVelo. The strategy mentions a few priorities to achieve this goal: overcoming infrastructure discontinuity, developing the national cycling friendly scheme “Accueil Vélo”, improving rest areas along cycle routes and implementing marketing and promotion activities. A special fund of €6 million is dedicated to that. EuroVelo’s infrastructure is already 93% in place in France (as of 2021) and the National Cycle Route Network includes EuroVelo routes as a backbone.

2.6 Central government investments

This compilation is a first attempt to present a systematic overview of central government investments. The figures include three main sources: central government budgets, as announced in national cycling strategies or annual budget plans, for example; EU funds from the 2014-2020 Multiannual Financial Framework period (primarily Structural and Cohesion Funds); and National Recovery and Resilience Plans. In order to allow for a first comparison between investment levels of different countries, we also state annual investments per capita. The figures we present are imperfect for many reasons, but we hope to improve them over time.

- The financial figures we present focus on capital investments, in particular cycling infrastructure projects. Central government revenue losses from fiscal and financial incentives, such as through tax-free bike-to-work allowances, tax-friendly company bike schemes and/or reduced VAT on sales, repair and rental of bicycles and bicycle parts, are not included.
- Fiscal spending between different levels of government (national, regional, local) may widely differ between countries, partly due to different set up of competences. Ireland, for example, is among the top investors from the national level, but there is little co-funding from the local level to top up these investments. In the Netherlands or France, by contrast, the majority of cycling investments is done by the local and regional level.
- Exact figures are often hard to come by as budgets differentiate between ring-fenced investments (i.e., a fixed investment sum for a specific cycle project) and non-ring-fenced investments (i.e., investments in cycling are optional under a wider mobility package, such as sustainable urban mobility). It may be difficult to disaggregate just how much of overall spend is actually spent on cycling infrastructure as part of those.
- There may exist considerable gaps between *planned* investments and *actual* investments. Traffic planners and engineers who can build cycling infrastructure are a rare resource in many countries.
- Budgets often undergo considerable annual changes from one fiscal year to another. Ideally, we would present an average of at least three to five years to even out lows as well as spikes.
- Investments announced in Operational Programmes are, strictly speaking, primarily EU investments, as the EU co-funding can be as high as 85%, in particular in EU member states that joined the EU from 2004 onwards. Hence, in these countries EU funds will provide the vast majority of investments in cycle projects. However, the national level still has a role to play when it comes to accepting cycling as a political priority (through integrating it into the Partnership Agreement and Operational Programmes, negotiated with the European Commission), and providing co-funding. For easier comparison, we include *planned* investments for the 2014-2020 period. Data about actual investments is not publicly available yet; and many Operational Programmes for the 2021-2027 period have yet to be concluded and publicised.

- As to the comparability between annual investments per capita: Purchasing Power Parity (PPP) differs between countries. One Euro in a high-income country normally buys you less than in a developing country.



The northern region of Belgium, Flanders, appears to be the top investor in cycling infrastructure. Flanders has exclusive competence over its entire road network and therefore can be somewhat compared to the role of the national level in other countries. Annually, the Flemish regional authorities invest about €300 million into cycling which translates into about €45 per capita. In addition, the sub-regional level (the five Flemish provinces) as well as the local level also undertake considerable investments. According to Fietsberaad Vlaanderen, towns and cities invest on average €15-20 per capita annually into cycling, three times more than five years ago.¹⁴ Flanders also absorbs the majority of the €411 million that are earmarked for cycling investments as part of Belgium’s National Recovery and Resilience Plan.

Runners-up to Flanders are Ireland, Norway, the Netherlands and Germany.

The detailed figures can be seen in Annex I: Central government investments.

¹⁴ <https://fietsberaad.be/nieuws/vlaamse-steden-en-gemeenten-investeren-steeds-meer-in-de-fiets/>

3. National cycling strategies in a wider European, international and global context

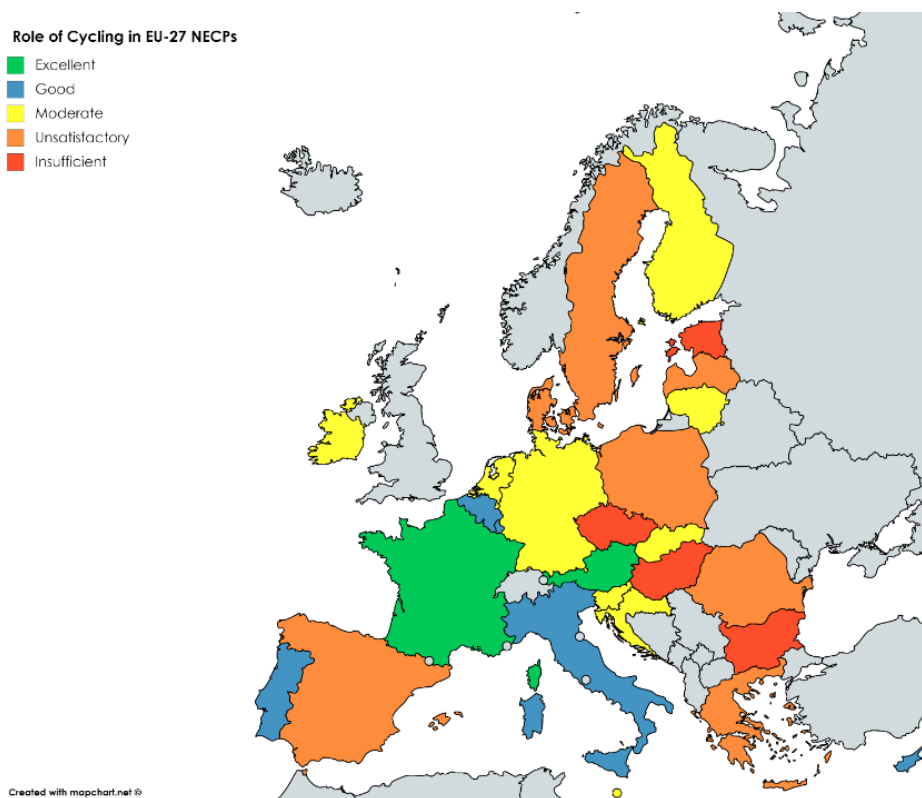
While national cycling strategies are primarily developed and implemented to meet domestic targets (e.g., more liveable towns and cities, a healthier population, safer roads, a prosperous bicycle manufacturing and cycle tourism industry, etc.), they also serve global purposes, most notably the reduction in Greenhouse Gas emissions (GHG), as well as energy consumption generated by the transport sector. According to the 2015 Paris Agreement, every country is expected to regularly submit **Nationally Determined Contributions** (NDC), which in their totality, and if implemented correctly, have to limit global warming to well below 2 or, preferably, 1.5 degrees Celsius compared to pre-industrial levels. So far, 48 countries have mentioned walking and cycling in their NDC.¹⁵

At European level, a similar policy instrument exists: **National Energy and Climate Plans** (NECPs). Driven by the overall target of reducing CO₂ emission by 40% by 2030, all EU-27 member states had to submit by 2019 detailed plans for the period 2021-2030 on how they intend to reduce emissions in sectors covered by the non-ETS sectors (Emission Trading System), such as land transport, buildings, agriculture and waste. The European Commission published in 2020 a detailed EU-wide assessment of the final NECPs.¹⁶ ECF carried out its own analysis of how cycling was taken into account by member states' NECPs.¹⁷ We concluded that, with some exceptions, so far cycling was not seen as a fully-fledged means to reduce GHG emissions in the transport sector.

¹⁵ PATH Partnership for Active Travel and Health: Make way for walking and cycling, 2022.
<https://pathforwalkingcycling.com/report/>

¹⁶ https://energy.ec.europa.eu/topics/energy-strategy/national-energy-and-climate-plans-necps_en

¹⁷ ECF: Cycling Underrepresented in EU Member States' Final National Energy and Climate Plans
<https://ecf.com/news-and-events/news/cycling-underrepresented-eu-member-states%E2%80%99-final-national-energy-and-climate>



With the EU Green Deal and the increased ambition to achieve higher GHG emission reduction targets of -55 % by 2030, member states will have to go back to the drawing board and submit updated draft NECPs to the European Commission by 30 June 2023. It should be a no-brainer that cycling as a zero-emission means of transportation has to play a more prominent role in future NECPs than it did up until now.

ECF recommendation: member states should fully take cycling measures into account in the next generation of National Energy and Climate Plans, due in 2023.

Other relevant EU policy instruments are the Recovery and Resilience Facility (RRF) and the EU Structural and Cohesion Funds. A total of €1.7 billion will be invested into cycling through the RRF; and, according to the latest figures publicised by the European Commission in 2022, as much as €2.3 billion went into cycling projects through the 2014-2020 Structural and Cohesion Funds. ECF expects even higher investments in the next generation of these funds (2021-2027). National and regional Operational Programmes are ideally embedded into national (and regional) cycling strategies to ensure and demonstrate coherence of investments over time.

Beyond the EU, important work has also been carried out with the development of the pan-European Master Plan for Cycling Promotion, adopted in 2021. According to the Master Plan, every member state of the pan-European region has to develop and implement a national cycling strategy by 2030.¹⁸

¹⁸ <https://ecf.com/what-we-do/cycling-all-policies/pan-european-master-plan-cycling-promotion>

4. Country reviews

Austria

The Austrian “Cycling Masterplan” sets as its broad objective an increase of the cycling modal share (from 7% in 2010 to 13% in 2025), which should be realised through new investments in quality cycling infrastructure and by raising awareness of cycling on a daily basis. The priorities of the plan are: push for investments at all levels for the promotion of cycling; more cycle-friendly conditions such as the consolidation of infrastructure; information and awareness-raising campaigns; optimisation of coordination with other modes of transport; and bikes as a healthy mode of transport. Austria is also a partner of the Danube Cycle Plans programme.

Name	Masterplan Radfahren / Cycling Masterplan¹⁹
Year(s)	2015-2025
Level of adoption	Published by the Austrian Ministry of Agriculture, Forestry, Environment and Water Management
No. of strategy iterations	Third (previous: “Cycling Master Plan 2011-2015” and “Cycling Master Plan 2006”)
Cycling share²⁰	7% (2010)
EUROBAROMETER495/2019²¹	8%

¹⁹ English version available at: https://www.klimaaktiv.at/mobilitaet/radfahren/masterplan_RF_2025.html

²⁰ This always refers to the cycling share mentioned in the plan, if applicable.

²¹ This refers to the percentage of people that indicated the bicycle as their main mode of transport in the Eurobarometer 495 survey of 2019. Data available at page 13 here: <https://op.europa.eu/en/publication-detail/-/publication/7db0dbb1-dd0c-11ea-adf7-01aa75ed71a1/language-en>

Measurable objectives	<p>CYCLING SHARE: 13% (2025)</p> <p>ROAD SAFETY (Austrian Road Safety Programme 2011-2020): 50% road deaths reduction; 40% serious injury reduction; 20% personal injury reduction</p>
Other main interventions	<p>LEGAL CHANGES TO HIGHWAY CODE</p> <p>Further development of the road traffic regulations and adaptation of guidelines and standards at the federal level:</p> <ul style="list-style-type: none"> - Anchoring the cycle path signposting - Reform of the special priority rule for cyclists - Setting One-way cycling streets in the local area as a standard, with the possibility of restriction - Improving the situation for cycling children. <p>PROMOTE INTERMODALITY</p> <ul style="list-style-type: none"> - Optimize the links with other means of transport. Make bicycle carriage on trains and buses more attractive <p>CAPACITY-BUILDING</p> <ul style="list-style-type: none"> - Advisory programs in cycling (carried out since 2006) for the promotion of cycling in the context of mobility management. The addressees being companies, fleet operators, cities, municipalities, regions, schools etc. <p>CYCLING OFFICE AT THE STATE LEVEL</p> <ul style="list-style-type: none"> - Intensification of the nationwide coordination of Bicycle Coordinators (RadkoordinatorInnen) at state and city level (in parallel with the coordination and expansion of the internet platform klimaaktivmobil.at/radfahren for the exchange of information between all actors) <p>OTHER</p> <ul style="list-style-type: none"> - Intensification of the Ministry's research programs

- focusing on cycling by connecting bicycle industry, its customers and the research institutions
- Further expansion of the bike rental system

Belgium

The first-ever Belgian cycling action plan on the federal level was adopted in 2021. Whereas most competences have been transferred to its three regions (Flanders, Wallonia, Brussels-Capital Region), this plan aims to build upon the emerging trends throughout the entire country, many of which were brought about by the COVID-19 pandemic. The overarching goal is to facilitate more bicycle trips. The government aims to achieve an ambitious modal shift and to reduce greenhouse gases by 55% by 2030. Increasing the number of cyclists is also a means of reducing congestion. The Federal Planning Bureau calculated that traffic congestion in Belgium costs its citizens \$2.3 billion per year.

A total of 52 measures categorised across three main axes have been introduced. Additionally, every measure is assigned to one of the twenty Ministers and Secretaries of State who will monitor their own measures, in cooperation with other colleagues and will be responsible for their annual evaluation. These three axes are: 1) Facilitating practical and convenient access to bicycles; 2) Improving infrastructure safety and comfort (emphasis on theft prevention); 3) Making the bike option obvious and normal, as well as an additional group of supporting measures.

Name	BE CYCLIST - Plan d'Action pour la Promotion du Vélo du gouvernement fédéral 2021-2024²² / Actieplan ter Promotie van de Fiets van de federale regering 2021-2024 / Action plan for the promotion of the Bicycle of the Federal Government 2021-2024
Year(s)	2021-2024

²² French version available:

https://mobilit.belgium.be/sites/default/files/documents/publications/2022/plan_daction_velo_becyclist_2021-24_fr.pdf

Level of adoption	Federal government – approved by the Council of Ministers and supported by the Prime Minister
No. of strategy iterations	First
Cycling share	-
EUROBAROMETER495/2019	12%
Measurable objectives	-
Other main interventions	<p>CHANGES IN LEGISLATION / REGULATIONS / GUIDELINES etc.</p> <ul style="list-style-type: none"> - Adapt the Highway Code - Update the “Bike Theft Manual” - Include the fight against bicycle theft in the new version of the comprehensive security framework note <p>PROMOTE INTERMODALITY</p> <ul style="list-style-type: none"> - Improve the bicycle and train combination by the SNCB (national rail company) - Facilitate the development of cycle routes along the rails <p>OTHER</p> <ul style="list-style-type: none"> - The plan has broad ambitions regarding the popularisation and broad utilisation of cycling within the wider civil sector. These symbolic measures aim to directly increase the modal share of bikes among civil servants in all branches of the public sector. However, the main goal is to send a strong message to all citizens.

Cyprus

Transport Minister Yiannis Karousos presented an "Action Plan for the Promotion of Bicycle Use 2021-2023" (Σχεδίου Δράσης Προώθησης της Χρήσης του Ποδηλάτου για την περίοδο 2021-2023)²³ and announced investments of approximately €4 million (€1.3 per capita per year), which was approved by the government in February 2021. It is not a stand-alone document, but part of the National Plan for Energy and Climate 2021-2023. According to the declarations, the plan is a package of 17 actions, among which are the improvement of cycling infrastructure with newer and wider cycle paths, the updating of markings and standards of bike lanes, free transport of bicycles in public transport vehicles, construction of covered and safe bicycle parking stations, as well as locker rooms for employees in government buildings.

Name	Σχεδίου Δράσης Προώθησης της Χρήσης του Ποδηλάτου για την περίοδο 2021-2023 / Action Plan for the Promotion of Bicycle Use 2021-2023
Year(s)	2021-2023
Level of adoption	Governmental
No. of strategy iterations	First
Cycling share	-
EUROBAROMETER495/2019	0%
Measurable objectives	-
Other main objectives	CHANGES IN LEGISLATION / REGULATIONS / GUIDELINES

²³ Greek version available at: [Action Plan for the Promotion of the Use of the Bicycle 2021 - 2023 | Yiannis Karousos](#)

	<ul style="list-style-type: none"> - Reduction of the speed limit to 30 km/h in neighbourhoods and in historic or special cores, as well as in city centres - Traffic regulations for cyclists, such as a suitable signalling system and traffic lights to ensure continuous flow - Update of markings and standards. <p>PROMOTE INTERMODALITY</p> <ul style="list-style-type: none"> - Free transport of bicycles by public transport vehicles. <p>CAPACITY-BUILDING</p> <ul style="list-style-type: none"> - Providing free training courses for learning the proper use of bicycles and the Road Traffic Code, as well as the cultivation of culture through educational programs, films, experiential workshops and general promotions related to cycling. <p>OTHER</p> <ul style="list-style-type: none"> - Incentive plan and subsidy for the purchase of a new bicycle and a subsidy for the repair and maintenance of a bicycle
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Czech Republic

The Concept for Urban and Active Mobility 2021-2030 takes a wider approach than dedicated cycling strategies of other countries by addressing the entire transport system, including walking, cycling, public transport and cars. Perhaps unique in Europe, it recommends certain modal split targets depending on the population of the town or city. The share of cycling is expected to be highest in smaller cities.

Name	Urban and Active Mobility Concept 2021-2030; Transport Policy of the Czech Republic period 2021 - 2027
Year(s)	2021-2030
Level of adoption	Approved by the Government
No. of strategy iterations	Third (previous: "Czech National Cycling Development Strategy 2013-2020")

Cycling share	-				
EUROBAROMETER495/2019	6%				
Measurable objectives	City category	Walking	Cycling	Public transport	Individual car use
	A (>500.000 population)	28%	2-7% (depending on time of the year)	50%	15-20%
	B (250.000- 500.000)	30%	5-10%	45%	20%
	C (75.000- 250.000)	30-35%	10-15%	35-40%	20-25%
	D (42.000- 75.000)	35%	10-20%	30%	20-25%
	E (25.000- 42.000)	35-40%	15-25%	15-20%	25-30%
	F (up to 25.000)	40-50%	20-30%	5-20%	20-25%
Other main interventions	<ul style="list-style-type: none"> - Complete the network of cycle paths - Address the issue of motor vehicles entering cycle paths - Extend bike-sharing - Develop standards for parking space for bicycles - Improve the conditions for regular commuting to work and schools - Ensure the development of ITS to increase the safety of cyclists in road traffic - Submit a legislative proposal regulating the operation of e-bikes 				

Denmark

Denmark published its second national bicycle strategy in July 2014. It identified the steadily declining numbers of cyclists in the country during the 2000s as the main challenge and proposed a three-pillar strategy. Each pillar contains a number of specific initiatives to support and increase the use of bicycles as a means of transport for the benefit of mobility, the environment and public health.

The first pillar – “everyday cycling” – set out to increase the overall modal numbers of cycling by improving infrastructure, encouraging work commutes by bicycle and facilitating connections with public transportation. The second pillar – “active holidays and recreation” – aimed at improving citizens’ health by building more recreational cycling routes and investing in cycling tourism.

Ultimately, the “new and safe cyclists” pillar focused on increasing the safety of children while cycling by launching educational campaigns and providing safer bike routes to schools.

Name	Denmark – on your bike! The national bicycle strategy²⁴
Year(s)	2014
Level of adoption	Government
No. of strategy iterations	Second (previous: “More bikes on the road of the country – 2007”)
Cycling share	16% (2010-2013)
EUROBAROMETER495/2019	12%
Measurable objectives	-
Other main interventions	<p>CHANGES IN LEGISLATION / REGULATIONS / GUIDELINES etc.</p> <ul style="list-style-type: none"> - The Danish Road Directorate can grant a dispensation to municipal road authorities to allow cyclists to turn right at a red light (after running a test) <p>PROMOTE INTERMODALITY</p> <ul style="list-style-type: none"> - Foster the relationship between cycling and public transport with the help of a new door-to-door strategy, with better and more secure bicycle parking at stations and transport hubs <p>OTHER</p> <ul style="list-style-type: none"> - Develop Cycle Superhighways

²⁴ English version available at: <https://www.trm.dk/en/publications/2014/a-new-national-bicycle-strategy-denmark-on-your-bike>

Finland

“Kävelyn ja pyöräilyn edistämishjelma” is Finland’s third national cycling strategy with the goal to increase cycling and walking trips by 30% by 2030 the latest. For the years 2018-2023, 31 different measures have been defined in the program to achieve this goal in the following areas: changing attitudes, infrastructure, community structure and legislation. The allocated investments, responsible parties, duration, and measures of success are also described in this plan.

Name	Kävelyn ja pyöräilyn edistämishjelma/Walking and cycling promotion program²⁵
Year(s)	2018-2023
Level of adoption	Ministry of Transport and Communications
No. of strategy iterations	First ²⁶
Cycling share	8%
Eurobarometer 495/2019	13%
Measurable objectives	A 30% increase in walking and cycling trips
Other main interventions	<p>CHANGES IN LEGISLATION / REGULATIONS / GUIDELINES ETC.</p> <ul style="list-style-type: none"> - The duty of foresight and caution for all road users will be raised to the level of the law in the new Road Traffic Act. - Minor road traffic violations will be dealt with under the administrative sanction system.

²⁵ Finnish version available at:

<https://www.traficom.fi/sites/default/files/media/file/K%C3%A4velyn%20ja%20py%C3%B6r%C3%A4ilyn%20edist%C3%A4mishjelma.pdf>

²⁶ Earlier cycling plans listed in the 2021 edition were not politically adopted and hence do not qualify as national cycling strategies under ECF terminology.

	<ul style="list-style-type: none"> - Two-way cycling could be allowed on some one-way streets. <p>PROMOTE INTERMODALITY</p> <ul style="list-style-type: none"> - City bike systems are integrated with public transport. <p>CAPACITY-BUILDING</p> <ul style="list-style-type: none"> - Ensuring that enough personnel and resources are available for the promotion of cycling on a national level. The transport agency will be responsible as well as provinces, and tourism or cycling associations. <p>SUPPORT TO LOCAL AUTHORITIES</p> <ul style="list-style-type: none"> - Financially supporting walking and cycling programmes and resources at local level. <p>DEVELOPMENT OF A NATIONAL CYCLING NETWORK</p> <ul style="list-style-type: none"> - The state-maintained national bike path network will be improved. This network consists of routes between cities and urban areas that serve long-distance bicycle traffic.
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France

The French plan is based on four axes that aim to respond to the identified obstacles and the expectations of the French public: 1) the development of quality cycling facilities and, more generally, the improvement of road safety, 2) security: the fight against bicycle theft, 3) incentives: the establishment of an appropriate incentive framework that fully recognises cycling as a relevant and virtuous mode of transport and 4) the development of a cycling culture.

During September 2022, Prime Minister Elisabeth Borne announced that the active mobility fund will be renewed and endowed with €250 million for the year 2023.²⁷

Name	Plan Vélo & Mobilités Actives / Cycling Plan & Active Mobilities²⁸
Year(s)	2022-2027
Level of adoption	Adopted by the Government
No. of strategy iterations	Third (previous: “Plan National Vélo 2012-2020”; Plan Vélo 2018-2024)
Cycling share	3% (2018)
EUROBAROMETER495/2019	3%
Measurable objectives	Triple the modal share of cycling to reach 9%by 2024 and 12% by 2030
Other main interventions	<p>CHANGES IN LEGISLATION / REGULATIONS / GUIDELINES ETC.</p> <ul style="list-style-type: none"> - Changes in the Highway Code in favour of active mobility (by the end of 2019): <ul style="list-style-type: none"> - Provision of reserved parking spaces on the road - Advanced stop lines at traffic lights - Contraflow cycling - Authorisation to wear glare-free lighting devices not currently authorised - Allow abreast cycling in zone 30/low traffic areas

²⁷ Press release: https://www.ecologie.gouv.fr/sites/default/files/22165_DP-Plan-velo-VF.pdf

²⁸ French version available at: https://www.ecologie.gouv.fr/sites/default/files/Dossier_de_presse_-_Plan_v%C3%A9lo_-_vendredi_14_septembre_2018.pdf

- Heavy goods vehicles are prescribed with specific equipment that detects and warns of the presence of vulnerable users
- Simplify the legal status of “voies vertes” (greenways) to facilitate the coexistence of road users. Strengthen the active mobility content in planning documents by prescribing the development of continuous and secure cycle/pedestrian lanes, as well as parking areas.

PROMOTE INTERMODALITY

- Pay particular attention to intermodality facilitators. Make data available on cycle networks, sharing and rental schemes, as well as other mobility services to promote intermodality.

SUPPORT TO LOCAL AUTHORITIES

- "Cycling and territories" is a call for projects which allows territories to anticipate the implementation of the National "active mobility" Fund. More generally, it supports territories, in particular medium-sized agglomerations, in the definition of their cycling policy.

OTHER

- "Savoir rouler à vélo" is a program that offers a supervised training of 10 hours to children in the age range of 6-11 years old. In total this concerns approximately 850,000 children. This program is led by the Ministry of Sports.

Germany

The National Cycling Plan is the Federal Government’s strategy for the promotion of cycling in Germany. It is, by far, one of the most complete plans, often taken as a model for other countries, with a very specific number of clearly defined targets. All of the actions and objectives were coordinated in dialogue with professional associations and representatives from federal states and local authorities. The guiding objectives of the strategy are: 1) Implementing seamless cycling infrastructure; 2) becoming a country of cycling commuters and cyclists; 3) placing cycling at the heart of modern mobility systems and becoming ubiquitous in urban and rural areas; 4) Vision Zero for cycling; 5) conducting urban cargo transport by bicycle and 6) Making cycling smart and connected.

Name	Nationaler Radverkehrsplan 3.0 / National Cycling Plan 3.0²⁹
Year(s)	2021-2030
Level of adoption	Federal Government
No. of strategy iterations	Third (previous: “National Cycling Plan 2020 – Joining forces to evolve cycling – 2013”, “National Cycling Plan 2002-2012 – Ride your bike!”)
Cycling share	11% (2017)
EUROBAROMETER495/2019	15%
Measurable objectives	<p>By 2030 compared with 2017:</p> <ul style="list-style-type: none"> - Distance travelled by bicycle to double (112 km/day to 224) - No. of trips to increase from 120 per year per person to 180 - Average length of trips to increase from 3.7 to 6 km <p>By 2030 compared with 2019:</p> <ul style="list-style-type: none"> - Share of Germans who plan on cycling to increase from 41% to 60% - 40% reduction in the number of cyclists fatalities - Raise the aggregated financial support for cycling in all levels of government (local, county, regional, federal) from €11 to €30 per capita - At least 50% of users to rate the quality of bicycle transport on public transport positively
Other main interventions	CHANGES IN LEGISLATION / REGULATIONS / GUIDELINES etc.

²⁹ English version available at: https://bmdv.bund.de/SharedDocs/DE/Anlage/StV/nationaler-radverkehrsplan-3-0-en.pdf?__blob=publicationFile

- Modernise the legal framework to support logistic concepts that integrate bicycles, thus encouraging the reallocation of public land to balance the interests of all road users
- Review the obligation to use cycle lanes for cargo bikes and the right to use cycle lanes outside urban areas for pedelecs
- Strengthen the legal framework for commercial bicycle use, with the clarification of the technical regulations for cargo bikes
- Simplify design options in the public space, providing information on how and where bicycle rental systems can use public space, where parking facilities for cargo bikes can be designated and how junk bikes are dealt with

DEVELOPMENT OF NATIONAL CYCLING NETWORK

- Nationwide cycling infrastructure roll-out with the expansion of cycling routes defined in the cycling networks of the federal states (German Cycling Network), signposted according to uniform standards

PROMOTE INTERMODALITY

- Support the expansion of Bike & Ride facilities at railway stations; improve the integration of cycling into intermodal services in municipalities; expand and harmonise bicycle transport offers by broadening the opportunities for bicycles on long-distance trains and make the stations barrier-free. Public bicycle rental systems will be linked to each other by fare systems and digitally to local and long-distance public transport

SUPPORT TO LOCAL AUTHORITIES

- Support programmes for municipalities and businesses with user-friendly and low-threshold funding opportunities. Enable ordinances to promote cycling in order to provide local governments with the flexibility they need to promote cycling

	<p>CAPACITY-BUILDING</p> <ul style="list-style-type: none"> - The Bicycle Academy organises seminars and training courses, especially for employees in local authorities <p>CYCLING OFFICE AT THE STATE LEVEL</p> <ul style="list-style-type: none"> - Create administrative structures, jobs and permanent contact persons that coordinate and implement the tasks of cycling promotion and incorporate these tasks into integrated concepts (at the levels of Federal government, Federal states and local authorities) <p>OTHER</p> <ul style="list-style-type: none"> - Integrate cycling requirements into regional planning, planning laws and building regulations - Introduce mandatory safety management. Adapt road infrastructure safety management procedures to meet the needs of cycling (e.g. record additional information relevant to cycling safety management in police accident reports) - Make funding permanent and consider establishing a foundation to promote cycling culture - Examine the option of applying a reduced VAT rate for bicycle purchases and bicycle-related services
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Hungary

The share of cyclists in Hungary is higher than the European average, ranking third in the European Commission's "Special Eurobarometer 495" survey. In addition to the fact that in small settlements in flat areas traditionally many people cycle, cycling in Hungary is increasing in popularity because of recent developments and measures that have benefited cycling. The length of cycle routes has been dynamically increasing in the country, while more and more services for cyclists are available. In 2006, Hungary drafted the "Cycling Plan of Hungary", which was never officially adopted. This was followed by the "National Cycling Concept and Network Plan" (2012-2013), which contained medium and long-term objectives for cycling infrastructure development. The National Cycling Programme of 2014-2020 is the first official national cycling strategy designed to increase the number of people who regularly cycle in order to foster economic development, establish new workplaces, improve the health of the general population and increase the liveability of cities. Similar to Germany, the Hungarian plan is

particularly impressive for their precise and challenging set of targets. It is also a Partner of the Danube Cycle Plans.

Name	National Cycling Programme Hungary 2014-2020³⁰
Year(s)	2014-2020
Level of adoption	Government
No. of strategy iterations	First
Cycling share	22% (2014)
EUROBAROMETER495/2019	14%
Measurable objectives	<ul style="list-style-type: none"> - 30% increase in the number of cycling commuters - Establishment of 21 cyclist-friendly settlements or districts - Establishment of 500 km of new regional cycling routes - Development of 700 km of new national cycling routes - 1200 km new designated routes - 15 new bike sharing schemes nationwide - 5 new recreational bike rental systems, 50 users/day/system - 250,000 new bike parking and storage spaces - 10 new bike parks (for BMX, cross-country, downhill, cyclo-cross etc.) - Number of car drivers reached by cycling campaigns: 1,000,000 - Reach 5 million Hungarian and 1 million foreign cycling tourists - 15% income increase in the bicycle industry - 10% increase in the number of bicycles sales.

³⁰ English version available at: <https://silo.tips/download/national-cycling-programme-hungary>

<p>Other main interventions</p>	<p>CHANGES IN LEGISLATION / REGULATIONS / GUIDELINES ETC.</p> <ul style="list-style-type: none"> - Review and harmonisation of road design standards in the Highway Code. - Introduce bicycle-friendly transport legislation and requirements in favour of cycling - Obligatory integration of cycling developments into spatial and land use planning - Specify conditions for cycling in forests, natural reserves, flood prevention banks, protected zones of water reservoirs. <p>PROMOTE INTERMODALITY</p> <ul style="list-style-type: none"> - Provide safe bicycle storage, parking and carriage of bikes on public transport vehicles, with connected marketing and awareness campaigns. Improve the accessibility of public transport hubs, especially platforms of railway and bus stations <p>CAPACITY-BUILDING</p> <ul style="list-style-type: none"> - Educate bicycle (traffic) trainers, tour guides, bicycle repair courses, professionals (instructors, police, architects and urban planners, transportation engineers, local authorities etc.) with the assistance of international experts and by organising study trips <p>CYCLING OFFICE AT THE STATE LEVEL</p> <ul style="list-style-type: none"> - Establish a cycling coordination body <p>OTHER</p> <ul style="list-style-type: none"> - Establish a model of state funding for the maintenance and operation of cycling facilities
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Ireland

In Ireland the popularity of cycling has steadily declined since 1986, with the share of bike commuting falling from 7%, to 4.2% in 1996 and to 2% in 2006. With “Ireland’s First National Cycle Policy Framework”, the government acted to build a new culture of cycling in Ireland by 2020 and set the very ambitious goal of reaching a 10% cycle modal share within just 11 years. The document recognises that no single action will prompt people to cycle. Therefore, the policy framework outlined a comprehensive package of interventions to make cycling not only easier, but also safer.

While no investments were announced as part of this cycling strategy, the new national government that took power in 2020 pledged to invest €360 million annually into active mobility, representing 20% of its capital investments in transport (10% cycling, 10% walking).

Name	Ireland’s First National Cycle Policy Framework³¹
Year(s)	2009-2020
Level of adoption	Government
No. of strategy iteration	First
Cycling share	2% (2006)
EUROBAROMETER495/2019	1%
Measurable objectives	Cycling share of 10% (2020) Additional 125,000 people commuting to work by bike
Other main interventions	CHANGES IN LEGISLATION/REGULATIONS/GUIDELINES ETC. - Revise road traffic legislation (Rules of the Road) in favour of more sustainable modes such as walking and cycling (e.g., contra-flow cycle lanes, exemptions to cyclists from certain banned turns and access restrictions, combined bus/cycle

³¹ English version available at: <https://www.hse.ie/eng/about/who/healthwellbeing/our-priority-programmes/healthpublications/national-cycle-policy-framework.pdf>

	<p>priority measures, advanced stop lines for cyclists at traffic signals etc.)</p> <ul style="list-style-type: none"> - Revoke the statutory instrument which requires cyclists to use cycle tracks where they are provided - Develop national guidelines on bicycle parking. <p>DEVELOPMENT OF NATIONAL CYCLING NETWORK</p> <ul style="list-style-type: none"> - Development of the National Cycle Network (NCN). <p>PROMOTE INTERMODALITY</p> <ul style="list-style-type: none"> - Special attention to integrating cycling and public transport (PT), providing cycling parking at all appropriate PT interchanges and stops, safe routes to stations, bicycle carriage on PT. <p>CAPACITY-BUILDING</p> <ul style="list-style-type: none"> - Facilitate in the creation of a network of cycling experts and training workshops/sessions for all design professionals. <p>OTHER</p> <ul style="list-style-type: none"> - Investigate the possibility of using the indirect tax system to reduce the cost of bicycle purchase - Institution of Local Authority Cycling Officers.
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Italy

Italy has adopted its first cycling strategy called General Plan of Cycling Mobility 2022-2024 including a €1.154 billion investment. The plan was approved by Minister of Infrastructure and Sustainable Mobility (MIMS) after recognising the need for more sustainable transport and cycling's potential. The plan is set for a duration of three years and includes different areas of focus to ensure change on urban level but also on a bigger scale such as regional and national.

The plan's general goals are to equip Italy with resilient transportation systems, clean transportation with zero net emissions, active and safe mobility, and social inclusion to make transport more accessible and finally better use of public space.

Name	Piano Generale della Mobilità Ciclistica urbana e extraurbana 2022-2024 / General Plan for Urban and Extra-urban Cycling Mobility 2022-2024³²
Year(s)	2022 - 2024
Level of adoption	Minister of Infrastructure and Sustainable Mobility
No. of strategy iterations	First
Cycling share	-
Eurobarometer 495/2019	4%
Measurable objectives	<ul style="list-style-type: none"> - 20% increase of the cycling modal share of provincial capitals/metropolitan cities. - Increase the density of cycling infrastructures in provincial capitals/metropolitan cities to the national average value of 32 km per 100 km³. - Creation of enclosed parking spaces for at least 30 bicycles and outdoor parking spaces for at least 30 bicycles, for every public building and facility.
Other main interventions	<p>CHANGES IN LEGISLATION/REGULATIONS/GUIDELINES ETC.</p> <ul style="list-style-type: none"> - Update the standards of urban planning and building codes legislation with specific reference to cycling and the introduction of services for urban cycling. These services include bike sharing, cycle parking and charging stations for e-bikes. - Interventions in signage along cycle paths and crossings leading to schools. - The affixing of directional arrows indicating the direction of travel of the lane, especially when there is only one lane. - Implement speed management interventions (30 km/h zones, etc.) <p>PROMOTE INTERMODALITY</p>

³² Italian version available at: <https://aliautonomie.it/wp-content/uploads/2022/08/PG-Mobilita-Ciclista-e-allegati.pdf>

	<ul style="list-style-type: none"> - Increasing the possibility to carry bicycles on public transport, especially trains - Designated bike rails along the flights of stairs of the access paths to the platforms - Bike sharing stations near public transport stops - Construction of covered and guarded shelter for bicycles at 50% of public transport stations.
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Latvia

The national cycling development plan of Latvia is not designed for cycling, “but for the economy and its promotion through cycling”. It encompasses production, trade, exports, transport, mobility, health, culture, safety, education, sport and many other areas where cycling is not the intended target, but rather a means to contribute to overall prosperity.

Name	Velosatiksmes attīstības plānu 2018-2020 / Bicycle Development Plan 2018-2020³³
Year(s)	2018-2020
Level of adoption	Plan was published by the Cabinet of Ministers. It was developed through the implementation of the Government Declaration for higher integration of cycling into the overall transport system in the Action Plan of 2016.
No. of strategy iterations	First
Cycling share	-
EUROBAROMETER495/2019	8%
Measurable objectives	For 2020, with a 2016 baseline:

³³ Latvian version available at: <http://veloriga.lv/box/files/smpl120618veloplans.1519.pdf>

	<ul style="list-style-type: none"> - Increase no. of cyclists riding at least once a week from 23% to 30% - Increase no. of cyclists riding at least 5 days a week from 6 to 10% - Increase the total length of bicycle paths from 624 to 700 km.
Other main interventions	<p>CHANGES IN LEGISLATION / REGULATIONS / GUIDELINES etc.</p> <ul style="list-style-type: none"> - Update the Latvian standard “Road design Regulations” for bicycle traffic by including additional cycling requirements. <p>PROMOTE INTERMODALITY</p> <ul style="list-style-type: none"> - Create multimodal transport hubs and bicycle parks. Upgrade railway stations and bus stations.

Luxembourg

In 2022, the Grand Duchy of Luxembourg has published an updated national mobility plan focused on sustainability, following the Soft Mobility National Active Plan (2008) and Mobilité Durable (2012 and 2018). Cycling represents a small part of both mobility plans.

Luxembourg plans on increasing the amount of cycling trips from 2% (2017) to 11% (2035) by systematically integrating cycling infrastructure in all road projects to facilitate short and medium-distance travel. It is important to note that the 2025 objectives from MoDu 2 are still valid in the new plan, meaning that the aim is still an increase from 5% to 10% for home-to-work commute and from 3% to 15% for home-to-school trips.

Luxembourg plans to achieve this by:

1. Adopting favourable regulations for cycling, such as a law to further secure the national cycling network and to introduce the notion of the “express cyclable track”
2. Amending the Highway Code, by implementing crossing sidewalks, non-compulsory cycle paths, cycling streets, prescribing a lateral distance of 1.5m while overtaking etc. This also includes traffic calming measures in neighbourhoods.
3. Setting up an attractive and safe national cycling network, both for daily trips and for cycle tourism (including rural) in which cyclists do not have to ride in mixed traffic.

4. Integrating bicycles in all infrastructure and transport offers. Luxembourg has several research-based plans for specific roads in various cities to make the infrastructure bike friendly.

Name	PNM 2035 National mobility plan³⁴
Year(s)	2022-2035
Level of adoption	Ministry of Mobility and Public Works
No. of strategy iterations	Fourth (previous: “Soft mobility national action plan 2008”, “Mobilité Durable 2012- 2018”, “MoDu 2.0, 2018-2025”).
Cycling share	2% (2017)
Eurobarometer 495/2019	2%
Measurable objectives	<p>Cycling share</p> <ul style="list-style-type: none"> - 11% (2035) <p>Commute</p> <ul style="list-style-type: none"> - 10% (home-to-work, currently at 5%, 2025) - 15% (home-to-school, currently 3%, 2025) <p>Modal share of car trips</p> <ul style="list-style-type: none"> - Decrease of 25% from 2017- 2035 (starting at 46%)
Other main interventions	<p>CHANGES IN LEGISLATION / REGULATIONS / GUIDELINES etc.</p> <ul style="list-style-type: none"> - Adopting law to further secure the national cycling network and to introduce the notion of the “express cyclable track” - Amending the highway code by implementing crossing sidewalks, non-compulsory cycle paths, cycling streets,

³⁴ French version available at: <https://transports.public.lu/fr/publications/strategie/pnm-2035-brochure/pnm-2035-brochure-en.html>

	<p>prescribing a lateral distance of 1.5m while overtaking etc. This also includes traffic calming measures in neighborhoods.</p> <p>PROMOTE INTERMODALITY</p> <ul style="list-style-type: none"> - Providing fast and direct routes to the heart of metropolitan cities from a radius of at least 15 km adapted to a speed of 25km/h. - Providing cycling access to all tourist regions and connecting them to international tourism routes. <p>OTHER</p> <ul style="list-style-type: none"> - Developing cycling highways in different cities.
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Netherlands

In the Netherlands, functional cycling is the most developed at European and global level, as testified by the 41% of people that indicated bicycle as their main mode of transport for daily travel, as reported by the last Eurobarometer (EB495, 2019).

The Netherlands was a forerunner in conceptualising and implementing a national cycling strategy. The “1990-1997 Dutch Bicycle Master Plan” was the first of its kind. However, the national government then took the decision to transfer all responsibilities to the local and regional level and there has been no national cycling strategy in the strict sense ever since.

However, with the Tour de Force³⁵ starting in 2015 in Utrecht, various governmental and non-governmental actors, businesses and academia came together with the intention to promote cycling in a joint effort. In 2017, they drafted a joint Bicycle Agenda 2017-2020 with several actions to overcome barriers and exploit opportunities in cities, rural areas and in combination with public transport.

Although not a strategy in the most formal sense, Tour de Force is conceptualised as a programme in which the central government has the role of a liaison or assistant that brings parties together,

³⁵ Dutch version: <https://www.fietsberaad.nl/getmedia/b46be2c8-d935-412d-9888-c79f6d4dc349/Ambitiedocument-Tour-de-Force-2e-etappe-Schaalsprong-Fiets.pdf.aspx>

commissions research, conducts experiments, amends regulations and, in some cases, co-funds urban projects. The interested parties are expected to formulate ambitions and commit to these at a later stage in the programme.³⁶

The eight broader goals stated in the Tour’s agenda are: 1) the Netherlands as the leading bicycle country, 2) more room for the bicycle in cities, 3) boosting the quality on busy and important regional cycling routes, 4) optimising the transition between modes, public transport-bike and car-bike, 5) targeted cycling promotion, 6) less cycling accidents, 7) less stolen bicycles and 8) increased knowledge.

In July 2022, the State Secretary of Infrastructure and Water Management issued an official letter to the parliament’s second chamber concerning cycling ambitions for the future in the Netherlands. The plan is called “Nationaal Toekomstbeeld Fiets”, which translates to “National Vision Cycling”, and is in collaboration with Tour de Force.

The letter addresses a few issues that form the foundation for the plan’s ambitions. Firstly, almost half of the distances travelled by car are shorter than 7.5 km, a distance which is also possible by bicycle for most people. Secondly, many households cannot afford bicycles especially for children in cities. Thirdly, there have been more serious accidents among cyclists the past few years which is forecasted to continue. Finally, the bicycle can also be a solution for making housing more accessible in cities where space (especially for cars) is scarce, as a bike takes up 28 times less space than a car.

The plan’s four main priorities are: 1) 100,000 more people to cycle to work by the end of this electoral mandate, 2) the benefits of cycling to be consistently maximised when planning new housing, 3) ensure as many people as possible who are currently unable to cycle are encouraged and enabled to do so, 4) ensure the Netherlands will remain the world’s number one cycling country.

Name	Nationaal toekomstbeeld Fiets / National Vision Cycling³⁷
Year(s)	2022-2025
Level of adoption	Central Government
No. of strategy iterations	Third
Cycle share	27%
EUROBAROMETER495/2019	41%

³⁶ Dutch version <https://www.fietsberaad.nl/getattachment/Kennisbank/Uitvoeringsprogramma-Tour-de-Force-2020-2021/Uitvoeringsprogramma-TdF-2020-2021-120dpi-spread.pdf.aspx?lang=nl-NL>

³⁷ Dutch version: <nationale-toekomstbeeld-fiets-en-fietsambitie-22-25.pdf> (overheid.nl)

Measurable objectives	Increase the number of kilometres travelled by bicycle by 20% over the next ten years (2027)
Other main interventions	<p>CHANGES IN LEGISLATION / REGULATIONS / GUIDELINES ETC.</p> <ul style="list-style-type: none"> - Ensure satisfactory representation of cycling in the Strategisch Plan Verkeersveiligheid 2030 (Road Safety Strategic Plan) <p>PROMOTE INTERMODALITY</p> <ul style="list-style-type: none"> - Improve the link between the bicycle network and public transport by renovating or constructing additional bicycle-parking facilities at railway stations - Encourage and expand parking facilities for bicycles and (shared) bicycles supply at public transport hubs - Provide knowledge and expertise to boost the availability of services at public transport hubs <p>OTHER</p> <ul style="list-style-type: none"> - Campaign ‘Kies de Fiets!’ (choose the bicycle) stimulates companies to give employees allowances of 21 cents per km. Seven ministries have started a pilot in which participants can lease a traditional bicycle, electric bicycle or speed pedelec for work and their private lives. - Actively sharing national knowledge and experience related to active mobility through public diplomacy. Making cycling an important topic in international bilateral and trade relations

Norway

Norway does not have a stand-alone document for the national cycling policy, but the government sets several targets and actions for cycling in its “National Transport Plan 2014-2023”³⁸. Its goal is to

³⁸ English version available at: <https://www.regjeringen.no/contentassets/e6e7684b5d54473dadeeb7c599ff68b8/en-gb/pdfs/stm201220130026000engpdfs.pdf>

strengthen public transport and facilitate cycling and walking, particularly in urban areas where environmental and capacity challenges are prominent.

Name	National Transport Plan 2014-2023
Year(s)	2014-2023
Level of adoption	Governmental
No. of strategy iterations	First
Cycling share	4% (2014)
EUROBAROMETER495/2019	-
Measurable objectives	<p>By 2023 (compared to 2014):</p> <ul style="list-style-type: none"> - Increase cycling share from 4% to 8% - Build a total of 750 km of walking and cycling paths along the national road network (240 km of which in cities and towns) - Halve the number of serious injuries and fatalities in road traffic
Other main interventions	-

Portugal

With an integrated and clear strategy in the field of active cycling mobility, the aim of the Portuguese “National Strategy for Active Cycling Mobility 2020-2030” is to make Portugal a “proudly active” country, where cycling is a safe and widely practiced activity, constituting an accessible and attractive mobility option, thus maximising benefits for public health, the economy, employment, the environment and citizens. It provides 51 measures to promote active cycling mobility in four cross-cutting areas: 1) framework and legislation, 2) research and development, 3) monitoring and evaluation and 4) financing. This is in addition to three specific axes of intervention: 1) infrastructure and intermodality, 2) capacity building and support and 3) culture and behaviours.

As of 1 January 2023, a reduced VAT-rate of 6% will apply to the sales of bicycles. Portugal is the first EU country to apply the reduced rate following the revision of the VAT Council Directive 2006/112/EC in 2021.

Name	Estratégia Nacional para a Mobilidade Ativa Ciclável 2020-2030 / National Strategy for Active Cycling Mobility 2020-2030³⁹
Year(s)	2020-2030
Level of adoption	Approved by the Government
No. of strategy iterations	First
Cycling share	1% (2014)
EUROBAROMETER495/2019	0%
Measurable objectives	<p>2025 GOALS</p> <ul style="list-style-type: none"> - Modal share of bicycle trips in cities of 4% - A total extension of 5,000 km in cycle paths - Reduction of road accidents for cyclists by 25% <p>2030 GOALS</p> <ul style="list-style-type: none"> - Modal share of bicycle trips in cities of 10% - A total extension of 10,000 km in cycle paths - Reduction of road accidents for cyclists by 50%
Other main interventions	<p>CHANGES IN LEGISLATION / REGULATIONS / GUIDELINES ETC.</p> <ul style="list-style-type: none"> - Improve the Highway Code by taking into account innovative solutions that favour cycling - The Traffic Signalling Regulation associated with the latest revision of the Highway Code will be published in accordance with the law and will include specific horizontal and vertical signage suitable for bicycles - Review of other regulations that may enhance active modes of transport (e.g., the current Level Crossing Regulation or the regulation on parking spaces) which should guarantee

³⁹ Portuguese version available at: <https://dre.pt/web/guest/home/-/dre/123666113/details/maximized?fbclid=IwAR33HEXkCHVsg-nzd1rlzcpF0ZD7ly5R56nea6uimCwa0TfoHiMmATkMBco>

	<p>minimum requirements for bicycles and determine upper limits for car parking</p> <p>DEVELOPMENT OF NATIONAL CYCLING NETWORK</p> <ul style="list-style-type: none"> - Development a national cycle network of more than 6,000 km by 2023 <p>PROMOTE INTERMODALITY</p> <ul style="list-style-type: none"> - Review the possibility of transporting bicycles outside heavy passenger transport vehicles - Make bicycle transport practical and accessible by rail, river and, in justified situations, by road, for inter-urban and urban travel, with adequate bicycle parking <p>OTHER</p> <ul style="list-style-type: none"> - Improve legislation on working conditions. Workers will be guaranteed good conditions to travel by bicycle to the workplace, in particular changing rooms and lockers, which are mandatory for medium and large companies in any sector of the economy. In industrial complexes or business parks, equipment and services should be made available, thus encouraging the use of shared bicycles within them.
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Slovakia

As declared in their national cycling strategy, with regards to cycling policies, Slovakia is at the beginning of the road, "where it is necessary to take concrete measures in order to bring cycling as transport and cycle touring to the foreground and to use their potential". The document briefly describes the current state of cycling in Slovakia and declares the ambition to ensure a well-balanced and sustainable development of mobility and to create conditions for increasing citizens' standard of living. The vision is the emancipation of cycling from other transport modes for it to become a regular part of urban and regional transportation systems. In addition, it aims to improve the general awareness of the advantages of cycling as a form of transportation to school, work or for recreation, to the benefit of the environment, the economy and public health. Slovakia is also a partner of Danube Cycle Plans.

Name	Národná stratégia rozvoja cyklistickej dopravy a cykloturistiky v Slovenskej republike / National Strategy of the Development of Cycling Transport and Cycle Touring in the Slovak Republic⁴⁰
Year(s)	2014-2016
Level of adoption	Approved by the government
No. of strategy iterations	First
Cycling share	-
EUROBAROMETER495/2019	6%
Measurable objectives	CYCLING SHARE: 10% by 2020
Other main interventions	<p>CHANGES IN LEGISLATION / REGULATIONS / GUIDELINES ETC.</p> <ul style="list-style-type: none"> - Improve legislation by drawing up a comprehensive and integrated technical standards or regulations which determine procedures for the planning and construction of cycling transport infrastructure in urban and rural zones - Amend acts relating to the road network and road traffic - Determine obligations to design cycle tracks in case of new construction or reconstruction of roads and footways - Determine obligations for administrative authorities to withhold approval on any investment project that does not deal with the issue of cycling transport - Amend regulation on the protection of nature and landscape, forests, land registry, settlement of land, construction of hydraulic works and river administration

⁴⁰ English version available at: <https://www.mindop.sk/ministerstvo-1/doprava-3/cyklisticka-doprava-a-cykloturistika/national-strategy-of-development-of-cycling-transport-and-cycle-touring-in-the-slovak-republic-english-version-7-6-mb-pdf>

	<p>CYCLING OFFICE AT THE STATE LEVEL</p> <ul style="list-style-type: none"> - Introduction of cycling coordinators at national and local levels, who are responsible for the coordination of cycling transport <p>OTHER</p> <ul style="list-style-type: none"> - Establishing a permanent financial mechanism for the implementation of the Cycling Strategy - Establishing an inter-ministerial working group for the development of cycling transport and cycle touring in Slovakia - Amending the existing STN 01 8028 (technical standards) regarding cyclo-touristic marking.
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Spain

Spain adopted its first ever national cycling strategy in 2021, thus taking a step forward in recognising the importance of cycling as a fundamental solution for urban mobility. The National Strategy sets clear activities and ambitions for the development of cycling in Spain. For the first time, it defines state investments exclusively dedicated to cycling. The Strategy has been presented under the motto “Efecto Bicicleta: cuando te sumas, todo rueda” (“Bicycle effect: when we come together, it all works out”), which underlines how the promotion and increase of active mobility is a mission for society as a whole. The five priorities of the Strategy can be summarised as follows: 1) Pursuing sustainable mobility through a modal shift to cycling; 2) promoting healthy living through active mobility; 3) exploiting the potential of cycle tourism; 4) promoting leisure and sports cycling; and 5) coordinating the action of the state in promoting cycling.

With regards to point 5, the Spanish government announced in December 2022 the installation of an inter-ministerial working group, bringing together 12 ministries.⁴¹

⁴¹ <https://www.mitma.gob.es/el-ministerio/sala-de-prensa/noticias/mar-13122022-1509>

Name	Estrategia estatal por la bicicleta / National Strategy for Cycling⁴²
Year(s)	2020-2025
Level of adoption	Approved by the Government
No. of strategy iterations	First
Cycling share	-
EUROBAROMETER495/2019	2%
Measurable objectives	-
Other main interventions	<p>CHANGES IN LEGISLATION / REGULATIONS / GUIDELINES ETC.</p> <ul style="list-style-type: none"> - Integrate and standardise planning laws for cycling infrastructure in motorised roads, with the aim of making cyclists safer and more visible - Propose mandatory parking regulations for bikes - Address the need for clear and homogenised regulation on cycling transit in urban areas. Focus on the cyclist as a vulnerable road user and establish specific criteria for their transit - The same goes for cycling infrastructure and the normative regulating the circulation of bicycle in natural areas <p>DEVELOPMENT OF A NATIONAL CYCLING NETWORK</p> <ul style="list-style-type: none"> - Planning of a large multilevel cycle routes network, which will need to be continuous and connected to urban centres <p>PROMOTE INTERMODALITY</p> <ul style="list-style-type: none"> - Work hand-in-hand with the Spanish Railways Foundation to improve bicycle-rail intermodality, thus creating safer access to stations and bicycle parking lots

⁴² Spanish version available at: <https://esmovilidad.mitma.es/estrategia-estatal-por-la-bicicleta>

	<p>SUPPORT TO LOCAL AUTHORITIES</p> <ul style="list-style-type: none"> - Provide guidance and support to local authorities to facilitate the shift in mentality required to achieve more cycling <p>CAPACITY-BUILDING</p> <ul style="list-style-type: none"> - Improve training of professionals, which would make it possible to have an effective network of specialists across different areas of cycle tourism <p>CYCLING OFFICE AT THE STATE LEVEL</p> <ul style="list-style-type: none"> - Creation of a Cycling Office at the Minister level (MITMA)
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Sweden

Sweden's national cycling strategy has the overall aim of promoting more and safer cycling. The strategy is an expression of the Government's ambitions in the field of cycling and a platform for future joint efforts. It aims to strengthen positive cycling trends and encourage more people to change their habits and start cycling. The strategy focuses on the following: 1) more bicycle-friendly municipalities, 2) greater knowledge about different groups of cyclists, 3) higher priority for bicycle traffic in community planning, more demonstration projects, 4) more functional and user-friendly cycling infrastructure, as well as adapted management and maintenance and 5) increased physical activity.

However, due to a change of government in October 2022, the status of the national cycling strategy which is up for revision is currently uncertain. A revised national transport budget, including state funding for cycling, is due in 2023.

Name	Cykel Strategi / A national cycling strategy for more and safer cycling⁴³
Year(s)	2017
Level of adoption	Government
No. of strategy iterations	Third (previous: "Safer cycling - a common strategy for the period 2014-2020 – Version 1.0", "National strategy for increased and safer cycling - 2000")
Cycling share	-
EUROBAROMETER495/2019	21%
Measurable objectives	-
Other main interventions	<p>CHANGES IN LEGISLATION / REGULATIONS / GUIDELINES ETC.</p> <ul style="list-style-type: none"> - Review existing regulations, including the amendment stipulating that cyclists over the age of 15 may ride on the road even though there is a cycle path - Adapt infrastructure design and maintenance to the needs of cyclists <p>CYCLING OFFICE AT THE STATE LEVEL</p> <ul style="list-style-type: none"> - Follow up on the developments in cycling within the National Cycling Council's framework (as part of the Swedish Transport Administration) <p>OTHER</p>

⁴³ English version available at:

https://www.government.se/4ac900/contentassets/edda7a998628453fa779717313ab5d9a/171117_slutlig-a-national-cycling-strategy-ppt.pdf

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| | <ul style="list-style-type: none">- Transport Analysis. Draw up a uniform method for the systematic measurement of bicycle traffic at local and regional levels. |
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Switzerland

In Switzerland there is no National Cycling Strategy as of yet. The modal share of cycling in Switzerland has been stable over the last few years at around 5%. Nevertheless, following a referendum⁴⁴ in 2018, a provision on cycling was introduced into the constitution, giving the federal level competences to act. The cycling law, passed by the Federal Council in May 2021 (Federal Act on Cycle Routes), forms a good basis for the improvement of general cycling conditions. It is a clear request from the Federal Council to the cantons and municipalities to make decisive progress in promoting cycling. The cantons and municipalities are therefore obliged to proceed with the planning and implementation of cycle path networks. The Federal Council proposes a planning period of 5 years and an implementation period of 20 years.⁴⁵

The Federal Roads Office, which is responsible for the implementation of the Cycle Routes Act, announced the launch of the Road Map Velo (RMV) in summer 2022. The goal of the RMV is to strengthen the cycling system and to double bicycle traffic by 2035, both in terms of mileage and number of trips. The RMV is a tool to coordinate and advance measures of public authorities and private stakeholders. The measures concern on the one hand the implementation of the Cycle Routes Act, and on the other hand the promotion of cycling.

United Kingdom

The National Cycling Strategy of 1996 was the UK's sole national strategy. Currently, each country (England, Northern Ireland, Scotland and Wales) is in charge of the implementation of their own cycling strategy. The most recent national data figures reported by Eurobarometer 495 (2019) on the share of people who chose cycling as the primary mode of travel amounted to 2% of the total population.

⁴⁴ https://www.swissinfo.ch/eng/september-23-ballot_swiss-to-vote-on-the-importance-of-cycling/44409042

⁴⁵ More information available at: <https://www.pro-velo.ch/de/ueber-uns/aktuelles/artikel/pro-velo-begruesst-das-veloweggesetz-als-wichtige-grundlage-fuer-die-foerderung-des-velofahrens>

England

Name	Gear Change: A bold vision for cycling and walking⁴⁶ as well as the second cycling and walking investment strategy (CWIS2)
Year(s)	2020-2025; 2022 - 2025
Level of adoption	The “Gear Change” vision was published by the Department of Transport and with a foreword of the former Prime Minister
No. of strategy iterations	Fourth (previous: “National Cycling Strategy”, 1996 (Applying for England, Scotland and Wales); “Cycling and walking investment strategy (CWIS 1) 2016-2021”)
Cycling share	2% (2018)
EUROBAROMETER495/2019	2%
Measurable objectives	50% of all short journeys in towns and cities, i.e., those under five miles, should be walked or cycled by 2030; and 55 % in 2035; Double cycling 'stages' from 0.8 billion in 2015 to 1.6 billion in 2025; Deliver a world-class cycling and walking network in England by 2040
Other main interventions	CHANGES IN LEGISLATION / REGULATIONS / GUIDELINES ETC. <ul style="list-style-type: none"> - Introduce a hierarchy of road users to ensure that those who can do the greatest harm have the greatest responsibility to reduce the danger or threat they may pose to others - Greater clarity on pedestrian and cyclist priority at junctions and introducing safe passing speeds and distances

⁴⁶ English version available at:

https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/904146/gear-change-a-bold-vision-for-cycling-and-walking.pdf

- Consider the role that the National Model Design Code and revisions to the Manual for Streets can play in delivering high quality, accessible, secure and safe cycle storage
- Introduce the offence of causing serious injury by careless or inconsiderate driving
- Increase the maximum sentence for causing death by dangerous or careless driving when under the influence of alcohol and drugs

DEVELOPMENT OF NATIONAL CYCLING NETWORK

- Improve and extend the National Cycle Network, especially where it is most useful for everyday journeys. Significantly increase funding, remove obstacles and increase the proportion of the Network that is traffic-free or protected from traffic

PROMOTE INTERMODALITY

- Make sure the railways cater to cyclists by investing substantial sums on safe cycling routes to stations, particularly in commuter towns. Increase cycle storage at stations, where it is currently limited
- Reverse the negative trend of reduced bicycle carriage on trains and buses

SUPPORT TO LOCAL AUTHORITIES

- Encourage and empower local authorities to take bold decisions
- Build up the capabilities of local authorities, including new officer posts and training
- Creation of “Mini-Holland” boroughs. Approve intensive and transformational spending on their roads and streetscapes to make them as cycle- and pedestrian-friendly as their Dutch equivalents. Select up to 12 willing local authority areas which are to benefit from intensive investment in “Mini-Holland” schemes.

	<p>CAPACITY-BUILDING</p> <ul style="list-style-type: none"> - Capacity building training for local authorities <p>CYCLING OFFICE AT THE STATE LEVEL</p> <ul style="list-style-type: none"> - Introduce a national cycling and walking commissioner which will lead “Active Travel England” – a new commissioning body and inspectorate <p>OTHER</p> <ul style="list-style-type: none"> - Establish a Cycling Technical Working Group responsible for developing a non-technical Annual Cycling Report. It will set out progresses and activities
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Wales

Wales established an Active Travel Act 2013 which created a real legal basis for active mobility in Wales - an exceptionally strong measure to boost cycling at the national level.

Name	An Active Travel Action Plan for Wales⁴⁷
Year(s)	2017
Level of adoption	Government
No. of strategy iterations	Third (previous: “National Cycling Strategy” 1996 (Applying for England, Scotland and Wales)’; “Active Travel Action Plan 2009-2013”)
Cycling share	-
Measurable objectives	Increase from the current 6% to 10% of people that would cycle at least once a week by 2026
Other main interventions	SUPPORT TO LOCAL AUTHORITIES

⁴⁷ English version available at: <https://gov.wales/sites/default/files/publications/2017-09/active-travel-action-plan.pdf>

	<ul style="list-style-type: none"> - Local authorities are encouraged to engage widely in fulfilling their mapping and planning duties under the Act, including with neighbouring authorities on cross boundary routes and networks <p>CYCLING OFFICE AT THE STATE LEVEL</p> <ul style="list-style-type: none"> - The Active Travel Board (with an independent Chair) will continue to oversee progress on the implementation of the Active Travel Act and this Action Plan at the national level. It will utilise its own expertise and networks to support the promotion of active travel, to champion active travel within their own organisations and to advise on the development and delivery of active travel interventions. <p>OTHER</p> <ul style="list-style-type: none"> - Keep subordinate active travel legislation under review, learning from early implementation of the Active Travel Act - The Active Travel (Wales) Act 2013 made it a legal requirement for local authorities in Wales to map and plan for suitable routes for active travel, and to build and improve their infrastructure for walking and cycling every year. The Act also requires both the Welsh Government and local authorities to promote walking and cycling as a mode of transport.
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Scotland

Name	Cycling Framework and Delivery Plan for Active Travel
Year(s)	2022-2030
Level of adoption	Government
No. of strategy iteration	Fifth: “National Cycling Plan”, 1996 (Applying for England, Scotland and Wales); Three iterations of the Cycling Action Plan for Scotland (CAPS – 2010, 2013 and 2017).

Measurable objectives	INVESTMENTS: Invest 10% of the transport budget on active travel from 2024/2025
Investments	-
Other main interventions	<p>DEVELOPMENT OF NATIONAL CYCLING NETWORK</p> <ul style="list-style-type: none"> - Implement dedicated, high-quality cycling infrastructure suitable for all - Embed cycling in the design and maintenance of our places and communities and prioritise user comfort and safety <p>PROMOTING INTERMODALITY</p> <ul style="list-style-type: none"> - Increase equity of access to cycles and cycling opportunities - Ensure modal integration across the transport network including adapted and non-standard cycles, e-cycles, cargo cycles and cycle-share <p>SUPPORT TO LOCAL AUTHORITIES</p> <ul style="list-style-type: none"> - Provide long-term funding and resourcing for the delivery of infrastructure and support behavioural change programmes, informed by local transport strategies - Promote and support innovation across the sector - Prioritise investment based on local transport strategies - Map existing and planned networks to identify gaps and improve consistency of quality and implementation <p>OTHER</p> <ul style="list-style-type: none"> - Expand monitoring networks and align monitoring at local and national levels - Embed learning into future investment decisions - Ensure that new infrastructure is supported by inclusive promotional programmes, cycling training and other complementary initiatives - Provide opportunities for all to learn to cycle from an early age and into adulthood

Northern Ireland

Name	A Bicycle Strategy for Northern Ireland⁴⁸
Year(s)	2015-2040
Level of adoption	Published by the Minister for Regional Development (DRD)
No. of strategy iterations	First
Cycling share	-
Measurable objectives	<p>By 2025:</p> <ul style="list-style-type: none"> - 20% of all journeys under one mile to be cycled (40% in 2040) - 10% of all journeys between one and two miles to be cycled (20% in 2040) - 5% of all journeys between two and five miles to be cycled (10% in 2040)
Other main interventions	<p>CHANGES IN LEGISLATION / REGULATIONS / GUIDELINES ETC.</p> <ul style="list-style-type: none"> - Improving awareness and communication of the Highway Code - Enforcement of ‘rules’ (identified by the use of the words ‘MUST/MUST NOT’ in the Highway Code) is a key issue for all road users - Identifying priorities and resource efficient mechanisms for proportionate enforcement of the ‘rules’ <p>DEVELOPMENT OF A NATIONAL CYCLING NETWORK</p> <ul style="list-style-type: none"> - Review existing National Cycle Network routes the goal of their further development via the introduction of more physical infrastructure in addition to existing signage

⁴⁸ English version available at: <https://www.infrastructure-ni.gov.uk/sites/default/files/publications/drd/a-bicycle-strategy-for-northern-ireland.pdf>

	<p>PROMOTE INTERMODALITY</p> <ul style="list-style-type: none">- Fully integrate the bicycle into the wider transport infrastructure, linking it with other modes of transport. Integrate cycling routes and infrastructure into transport hubs, bus and rail stations, as well as major bus stops and Park & Ride sites. Improve bicycle parking and carriage.
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ANNEX I: Central government investments

Country	Population (2021) ⁴⁹	1) Investments from central government budgets	Annual per capita	2) Projected Investments from EU funds (2014-2020) ⁵⁰	Annual per capita	3) National Recovery and Resilience Fund (2021 - 2027) ⁵¹	Annual per capita	Total annual investment per capita (1+2+3)
Austria	8.9 million	€40 million	€4.5	€2.6 million	€0.04	None	-	€4.5
Belgium	11.5 million	Unspecified ⁵²	-	€11.3 million	€0.1	€411 million ⁵³	€5.1	€5.2
Bulgaria	6.8 million	Unspecified	-	€130.2 million	€2.7	€1 million (ECF estimate)	€0.02	€2.7
Croatia	4.1 million			€30 million	€1	€6 million (ECF estimate)	€0.2	€1.2

⁴⁹ Total population of European countries: https://ec.europa.eu/eurostat/databrowser/view/demo_gjnd/default/table?lang=en

⁵⁰ These are projected investments as identified by ECF from 2014-2020 Operational Programmes <https://ecf.com/what-we-do/european-funding/eu-funds-observatory-cycling-2014-2020>. The actual spent figures will differ and likely be higher in many cases compared to the projected figures, but they are not available yet.

⁵¹ Investment figures are taken from national recovery and resilience funds. In several cases cycling investments were not ring-fenced by included in a larger mobility package. In those cases, we had to make estimates. <https://ecf.com/news-and-events/news/final-analysis-cycling-becomes-mainstream-eu-member-states-covid-19-recovery>

⁵² The three federal states – Brussels-Capital Region, Flanders and Wallonia – have exclusive competence of building and maintaining the road infrastructure, hence the federal level can only invest in cycling infrastructure in exceptional cases.

⁵³ Strictly speaking the vast majority of the investments are done by the regions, in particular Flanders.

Cyprus	0.9 million	€4 million (2021-2023)	€1.1	€7 million	€1.1	€14 million (ECF estimate)	€2.2	€4.4
Czech Republic	10.5 million	Unspecified	-	€25 million	€0.3	€25 million (ECF estimate)	€0.3	€0.6
Denmark	5.8 million	€57.3 million (unclear)	€1.4 ⁵⁴	-	-	€70 million	€1.7	€3.1
Estonia	1.3 million	Unspecified	-	-	-	€5 million	€0.5	€0.5
Finland	5.5 million	€92 million (2018-2020)	€1.4	€6 million	€0.2	None	-	€1.6
Flanders *	6.6 million	€300 million (2022)	€45					€45
France	67.7 million	€350 million (2018-2024) €250 million (2023)	€0.7 €3.7	€244.3 million	€0.5	None	-	€1.2
Germany	83.1 million	€186 million (2020) €385 million (2021) €758 million (2022) €550 million (2023) Ø €470 million	€2.2 €4.6 €9.00 €6.6 Ø €5.6	€131.3 million	€0.2	None	-	€9.2
Greece	10.6 million	Unspecified	-	€31.2 million	€0.4	€25 million (ECF estimate)	€0.3	€0.7

⁵⁴ The time frame of the investments announced in the 2014 Danish NCS was unspecified. For the purpose of this exercise, we assumed a 7-year timeframe 2014-2020.

Hungary	9.7 million	Unspecified	-	€297 (1+2)	€4.4	€120 million	€1.8	€6.2
Ireland	5 million	€180 million (Annually)	€36	€1 million	€0.03	None	-	€36
Italy	59.1 million			€88 million	€0.2	€1.154 billion (thereof €600 million from NRRF) ⁵⁵	€2.8	€3
Latvia	1.8 million	Unspecified	-	€15 million	€1.2	€34 million	€2.7	€3.9
Luxembourg	0.6 million	Unspecified	-	€2.5 million	€0.6	None	-	€0.6
Malta	0.5 million	Unspecified	-	€3.2 million	€0.9	€2 million (ECF estimate)	€0.6	€1.5
Netherlands	17.5 million	€950 million (2022-2025)	€13.6	€0.2 million	€0.001	None	-	€13.6
Norway	5.4 million	€1 billion (2014-2023)	€18.9	None	-	None	-	€18.9
Poland	37.7 million	Unspecified	-	€403.6 million	€1.5	€14 million (ECF estimate)	€0.05	€1.6
Portugal	10.3 million	€1 million (2022)	€0.1	€15.5 million	€0.2	None	-	€0.3
Romania	19.1 million	Unspecified	-	€71 million	€0.5	€120 million	€0.9	€1.4

⁵⁵ The Investment is for 2022-2024.

Slovakia	5.4 million	Unspecified	-	€28.65 million	€0.8	€105.1 million	€2.8	€4
Slovenia	2.1 million	Unspecified	-	€20 million	€1.4	€1 million (ECF estimate)	€0.07	€1.5
Spain	47.4 million	€5 million (2020)	€0.1	€247.3 million	€0.7	€135 million (ECF estimate)	€0.4	€1.2
Sweden	10 million	Unspecified	-	€8.2 million	€0.1	€25 million (ECF estimate)	€0.4	€0.5
Switzerland	8.4 million	Unspecified	-	-		None	-	-

ANNEX II: National cycling strategies: Table overview

COUNTRY	TARGETS SET									OTHER INTERVENTIONS						
	National Cycling Strategy	Year of adoption	Years span	No. of strategy iterations	Endorsed Par-Eu Master Plan	Bike as main mode 2019 (EB)	Cycling share	Road fatalities	No. of cycling trips	Legal changes to the highway code	Other changes in regulations	Promote intermodality	Capacity-building	Cycling office/coordination at the state level	Development of a National Cycling Network	Support to local authorities
Austria	Yes	2015	11	3	Yes	8%	13%	-50%		Yes		Yes	Yes	Yes		
Belgium	Yes	2021	4	1	Yes	12%				Yes	Yes	Yes				
Croatia	Under dev.	2022	5	1	Yes	6%										
Cyprus	Similar doc.	2021	2	1	Yes	0%					Yes	Yes	Yes			
Czechia	Yes	2021	10	3	Yes	6%%	Dep on size of city			Yes	Yes	Yes	Yes	Yes		Yes
Denmark	Expired	2014	N/D	2	Yes	12%				Yes		Yes				
Estonia	No					4%										
Finland	Yes	2018	12	3	8%	13%			+30 %	Yes	Yes	Yes	Yes	Yes	Yes	Yes
France	Yes	2022	6	3	Yes	3%	12%			Yes	Yes	Yes	Yes	Yes	Yes	Yes
Germany	Yes	2021	10	3	Yes	15%		-40%	+50 %	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Greece	Under dev.				Yes	2%										

Hungary	Expired	2014	7	1	Yes	14%			" +30 %	Yes	Yes	Yes	Yes	Yes		
Ireland	Expired	2009	12	1	Yes	1%	10%			Yes	Yes	Yes	Yes		Yes	
Italy	Yes	2022	3	1	Yes	4%				Yes	Yes	Yes	Yes		Yes	Yes
Latvia	Expired	2018	3	1	Yes	8%	10%*				Yes	Yes				
Lithuania	No				Yes	5%										
Luxembourg	Similar doc.	2022	13	4	Yes	2%	11%					Yes				
Malta	Under Dev.					2%										

	National Cycling Strategy	Year of adoption	Years span	No. of strategy iterations	Endorsed Pan-Eu Master Plan	Bike as main mode 2019 (EB)	Cycling share	Road fatalities	No. of cycling trips	Legal changes to the highway code	Other changes in regulations	Promote intermodality	Capacity-building	Cycling office/coordination at the state level	Development of a National Cycling Network	Support to local authorities
Netherlands	Similar doc.	2017	N/D		Yes	41%					Yes	Yes	Yes			Yes
Poland	No					7%										
Portugal	Yes	2019	11	1	Yes	0%	10%	-50%		Yes	Yes	Yes			Yes	
Romania	Under dev.				Yes	4%										
Slovakia	Expired	2014	3	1	Yes	6%	10%			Yes	Yes			Yes		
Slovenia	Under dev.				Yes	4%										
Spain	Yes	2021	6	1	Yes	2%				Yes	Yes	Yes	Yes	Yes	Yes	
Sweden	Expired	2017	N/D	3		21%				Yes	Yes			Yes		
Switzerland	No				Yes											
Norway	Similar doc.	2014	10		Yes	4%	8%	-50%							Yes	
Iceland	No				Yes											
England	Yes	2022	4	4	Yes	2%	50% (active)			Yes	Yes	Yes	Yes		Yes	Yes
Scotland	Yes	2022	8	5								Yes			Yes	Yes
Wales	Yes	2017	N/D	3			10% cycle at least once a week									Yes
N. Ireland	Yes	2015	26	1			10%*				Yes	Yes			Yes	

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Belgium

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Czech Republic

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Denmark

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Finland

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Ireland

<https://www.hse.ie/eng/about/who/healthwellbeing/our-priority-programmes/heal/healpublications/national-cycle-policy-framework.pdf>

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Latvia

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Luxembourg

<https://transports.public.lu/fr/publications/strategie/pnm-2035-brochure/pnm-2035-brochure-en.html>

Malta

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Netherlands

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Portugal

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European Cyclists' Federation

Mundo Madou
Rue de la Charité 22
B-1210 Brussels

