



EUROPEAN CYCLISTS' FEDERATION

# The state of national cycling strategies in Europe (2023)

3<sup>rd</sup> edition



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# Executive summary

National cycling strategies are a crucial, if not indispensable instrument in developing cycling across a country. Not only in some pockets such as in progressive metropolitan cities, but also in small and medium-sized towns as well as in rural areas where cycling may not be the logical choice of many. A national cycling strategy accepts this challenge, mobilising necessary resources and aligns stakeholders to foster change to get more people cycling more often.

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, 56 countries in the pan-European region are politically bound to develop and implement strategies to develop cycling at their national level by 2030. With the third edition of this report we expanded our coverage to all 54 Eurasian countries.

Developing a national cycling strategy is not a new policy instrument. The most cycling-friendly country in the world, the Netherlands, “invented” it in 1990, followed by the UK in 1996, Germany in 2002 and Czechia in 2004. With this 2023 edition, we are in a position to add four more countries to the list of countries with a current national cycling strategy: Belarus, Croatia, Hungary and Israel. Three more countries have adopted policies similar to a national cycling strategy: Ireland, Liechtenstein and Switzerland.

Out of the 54 European countries covered by this report:

- 14 countries now have a national cycling strategy in place.
- 7 countries have a strategy similar to a national cycling strategy in place.
- 4 countries used to have a national cycling strategy but it has expired and needs updating.
- In eight countries a first national cycling strategy is under development.
- In 21 countries none of the above applies; a national cycling strategy or similar document is neither in place nor is under development.

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 Western Balkans, the Caucasus and Central Asia.

Among the 21 strategies identified, interventions on infrastructure (21), road safety (17), intermodality (16) and traffic laws/highway codes (16) are among the most popular ones. At the other spectrum, bike theft has been addressed in only four strategies.

In terms of central government investments in cycling/active mobility, Ireland is the top investor with some €72 per capita annually, followed by Luxembourg (€52), the Belgian region of Flanders (€48), Scotland (€40) and Slovenia (€23). In 22 countries annual central government investments are below €10 per capita.

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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 56 countries<sup>1</sup>, 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, supported by a national cycling plan"**.

Up until ECF's first report of this series in 2021, no comprehensive analysis had been done over which countries in the UNECE region have a national cycling strategy, or a similar document, already in place. 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. The sub-chapter on central government investments was updated with figures where accessible. This 3<sup>rd</sup> edition also looks at relevant climate and energy policy frameworks by highlighting how cycling is incorporated into Nationally Determined Contributions (NDC)<sup>2</sup> as well as National Energy and Climate Plans (NECP).<sup>3</sup>

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

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<sup>1</sup> <https://unece.org/member-states-and-member-states-representatives>

<sup>2</sup> <https://unfccc.int/ndc-information/nationally-determined-contributions-ndcs>

<sup>3</sup> <https://ecf.com/news-and-events/news/cycling-underrepresented-eu-member-states%E2%80%99-final-national-energy-and-climate>

# 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 measurable 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 parliament<sup>4</sup>).
- 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 impact assessment of resources needed to achieve said 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);

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<sup>4</sup> 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.
  - Fiscal and financial instruments.
- 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 (and walking) strategies and/or about the presence of active mobility policies and strategies can be found in these documents:

- ECMT, National Policies to Promote Cycling. Organization for Economic Cooperation and Development (OECD), Paris, 2004.<sup>5</sup>
- PATH Partnership for Active Travel and Health: National Policies for Walking and Cycling in ITF Countries, 2023.<sup>6</sup>
- PATH Partnership for Active Travel and Health: National Policies for Walking and Cycling in all 197 UNFCCC countries, 2023.<sup>7</sup>
- Jaroslav Martinek and Jitka Vrtalová: Danube Cycle Plans. Guidelines on how to set up a national cycling plan, 2021.<sup>8</sup>
- UNECE/WHO: The Pan-European Master Plan for Cycle Promotion, 2021.<sup>9</sup>

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<sup>5</sup> <http://www.internationaltransportforum.org/pub/pdf/04Cycling.pdf>

<sup>6</sup> [https://ecf.com/system/files/PATH\\_Report\\_National\\_Policies\\_for\\_Walking\\_and\\_Cycling\\_in\\_IFT\\_Countries.pdf](https://ecf.com/system/files/PATH_Report_National_Policies_for_Walking_and_Cycling_in_IFT_Countries.pdf)

<sup>7</sup> <https://pathforwalkingcycling.com/wp-content/uploads/PATH-UNFCCC-policies-report-FINAL.pdf>

<sup>8</sup> [https://www.interreg-danube.eu/uploads/media/approved\\_project\\_public/0001/44/f8ecf58ffeb4f347bd9df73f96a208677bf4d73.pdf](https://www.interreg-danube.eu/uploads/media/approved_project_public/0001/44/f8ecf58ffeb4f347bd9df73f96a208677bf4d73.pdf)

<sup>9</sup> [https://thepep.unece.org/sites/default/files/2021-06/MASTERPLAN\\_2021-05-20-II\\_BF%203%20June\\_0.pdf](https://thepep.unece.org/sites/default/files/2021-06/MASTERPLAN_2021-05-20-II_BF%203%20June_0.pdf)



# 2. Overview of the state of national cycling strategies

## 2.1 The state in 2023

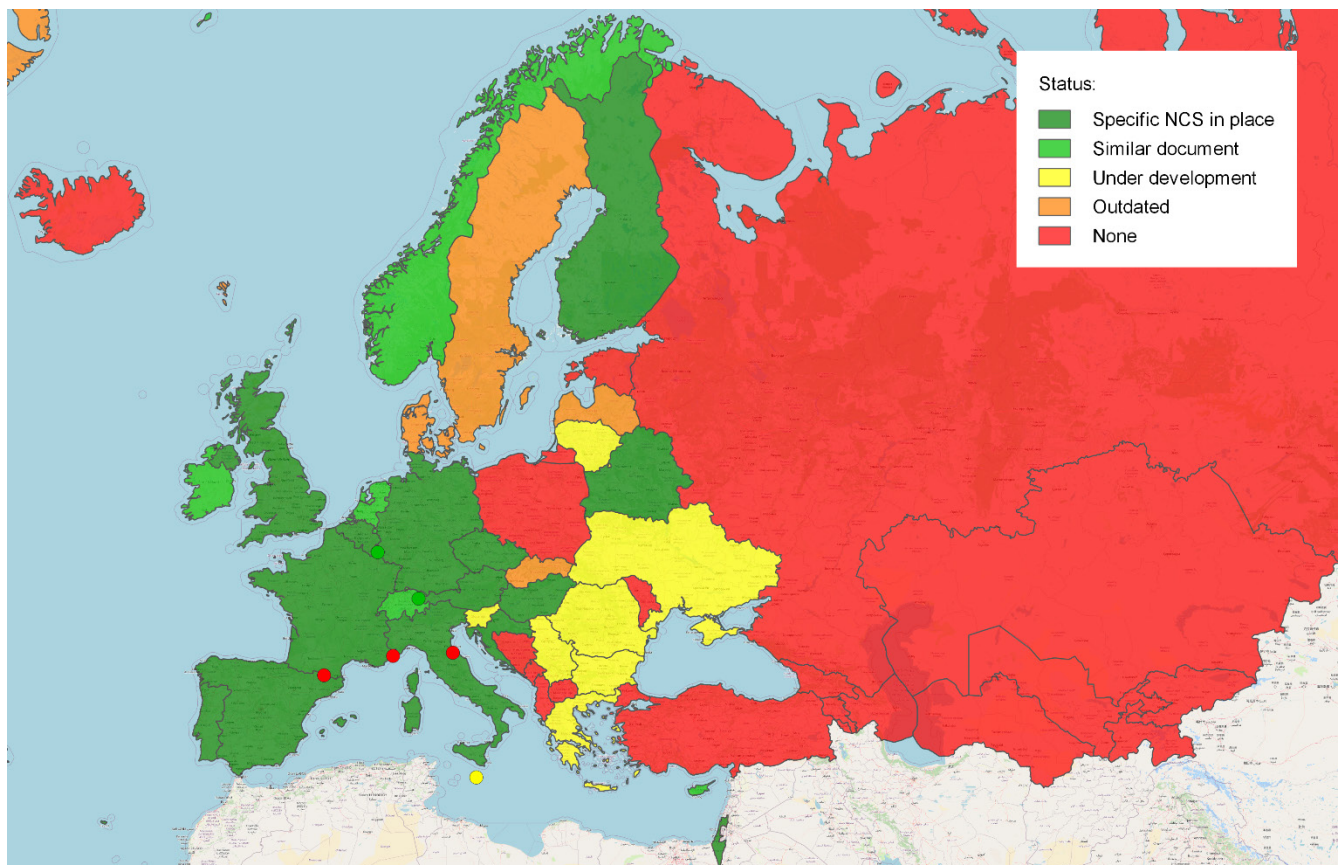


Figure 1: The status of national cycling strategies in Europe.

Compared to our last report published with data from 2022, these new developments are the main ones to highlight:

- Croatia adopted its first ever national cycling strategy;
- Hungary adopted a new national cycling strategy;
- Belarus was added to the list of countries having a national cycling strategy in place. This situation applied already in 2022 but was misstated in our 2022 report;
- Israel, falling for the first time inside the scope of our research, has approved a national cycling plan in 2022;
- Ireland's first cycling strategy was replaced with a broader sustainable mobility policy;
- In Switzerland a federal act on cycle routes to mandate cantons to develop cycle route networks entered into force in 2023;

- Microstates<sup>10</sup> were added to the analysis, including the transport strategy of Liechtenstein;
- Mode share data for the EU-27 is now based on the Commission Study on New Mobility Patterns in European Cities, which is more accurate than the previously used Eurobarometer data.

### State of play of national cycling strategies in the pan-European region:

- 14 countries now have a national cycling strategy in place.<sup>11</sup>
- Seven countries have a strategy similar to a national cycling strategy in place.
- Four countries used to have a national cycling strategy but it has expired and needs updating.
- In eight countries a first national cycling strategy is under development.
- In 21 countries none of the above applies; a national cycling strategy/similar document is neither in place nor is under development.

National Cycling Strategy (NCS)	Countries
<b>NCS in place (14)</b> [UK countries are counted only as one entity <sup>12</sup> ]	Austria, Belarus, Belgium, Croatia, Czechia, Finland, France, Germany, Hungary, Israel, Italy, Portugal, Spain, England (UK), <i>Scotland (UK)</i> , <i>Northern Ireland (UK)</i> , <i>Wales (UK)</i>
<b>No explicit NCS, but a similar document is in place (7)</b>	Cyprus, Ireland, Liechtenstein, Luxembourg, Netherlands, Norway, Switzerland.
<b>NCS was in place, but has expired and needs updating (4)</b>	Denmark, Latvia, Slovakia, Sweden
<b>First NCS under development (8)</b>	Bulgaria, Greece, Lithuania, Malta, Romania, Serbia, Slovenia, Ukraine <sup>13</sup>
<b>No NCS (21)</b>	Albania, Andorra, Armenia, Azerbaijan, Bosnia and Herzegovina, Estonia, Georgia, Iceland, Kazakhstan, Kyrgyzstan, Moldova, Monaco, Montenegro, North Macedonia, Poland, Russia, San Marino, Tajikistan, Türkiye, Turkmenistan, Uzbekistan

Table 1: The status of national cycling strategies in Europe.

<sup>10</sup> Andorra, Liechtenstein, Monaco and San Marino. Vatican City is not a member of the UNECE/WHO European Region.

<sup>11</sup> The UK is counted as one country. It would be 17 if Northern Ireland, Scotland and Wales were counted individually.

<sup>12</sup> The UK consists of four countries: England, Northern Ireland, 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 for 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 the population), the number we allocate follows the situation in England.

<sup>13</sup> In our first 2021 edition 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.

## Trajectory 2021 - 2022 - 2023

A positive trend can be identified when comparing 2021 – the year of the adoption of the pan-European Master Plan – with 2022 and 2023.

Status	2021	2022	2023	% in 2023
Specific NCS in place	7	10	14	24%
Similar document	3	4	7	13%
Outdated	9	6	4	7%
Under development	5	8	8	15%
None	30	26	21	41%
<b>Grand Total</b>	<b>54</b>	<b>54</b>	<b>54</b>	<b>100%</b>

Table 2: The trajectory of the status of National Cycling Strategies 2021 - 2022 - 2023.

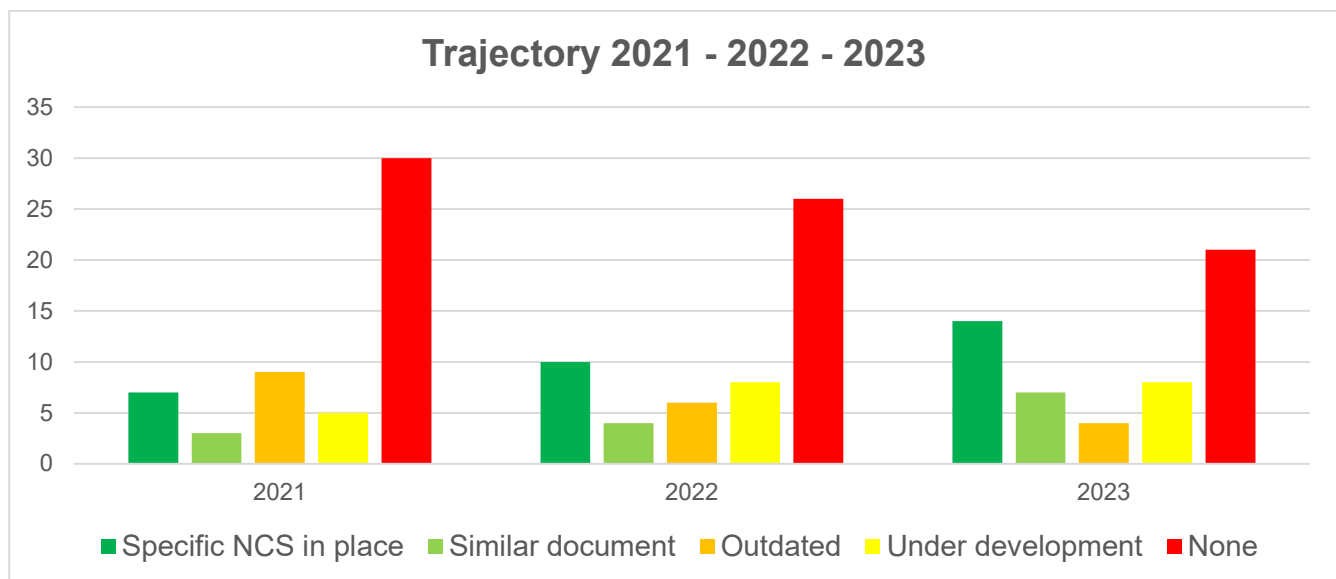


Figure 2: The trajectory of the status of National Cycling Strategies 2021 - 2022 - 2023.

## 2.2 Duration of the strategies

National cycling strategies can differ widely in terms of duration. Quite a few typically align with a government’s term (usually four to five years). Several countries opt for periods of about ten years and thus set a long-term vision and goals going beyond the immediate government term. Northern Ireland is an outlier by opting for a 25-year period (2015-2040), followed by Israel (2021-2041). The average duration is close to nine years.

Up to 5 years	6 - 8 years	~ 10 years	>10 years	Not determined
Belgium Croatia Cyprus Finland Ireland Italy Latvia* Netherlands Slovakia* England (UK) Spain	France Hungary Scotland	Austria Czechia Germany Liechtenstein Norway Portugal	Israel Luxembourg Northern Ireland	Belarus Denmark* Sweden* Switzerland Wales

Table 3: Durations of strategies. \*countries with outdated strategies

## 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
Belarus Belgium Croatia Cyprus Finland Israel Italy Latvia* Liechtenstein Portugal Slovakia* Spain Switzerland Northern Ireland	Denmark* Ireland Hungary Netherlands Norway Wales	Austria Czechia France Germany Sweden*	England (UK) Luxembourg	Scotland

Table 4: Iterations of strategies. \*countries with outdated strategies

## 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 main recurring content of cycling plans entail:

- **Infrastructure** is the one element covered in every cycling strategy identified.
- 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 improvement of **road safety** for cyclists, often together with improving **infrastructure**.
- The development or expansion of a **national cycle route network**.
- 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)

Other recurring elements that can be seen as common priorities in national cycling strategies in Europe 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.

- **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).
- The development of **cycle logistics** as an environmentally friendly alternative to transport of goods by car or van.
- **Industrial strategies**, highlighting the economic importance of the bicycle industry as a strategic industrial sector, aiming at strengthening the domestic bicycle industry.
- Investment in **cycle tourism** to boost the tourism sector or divert tourism away from overcrowded areas to lesser-known ones.

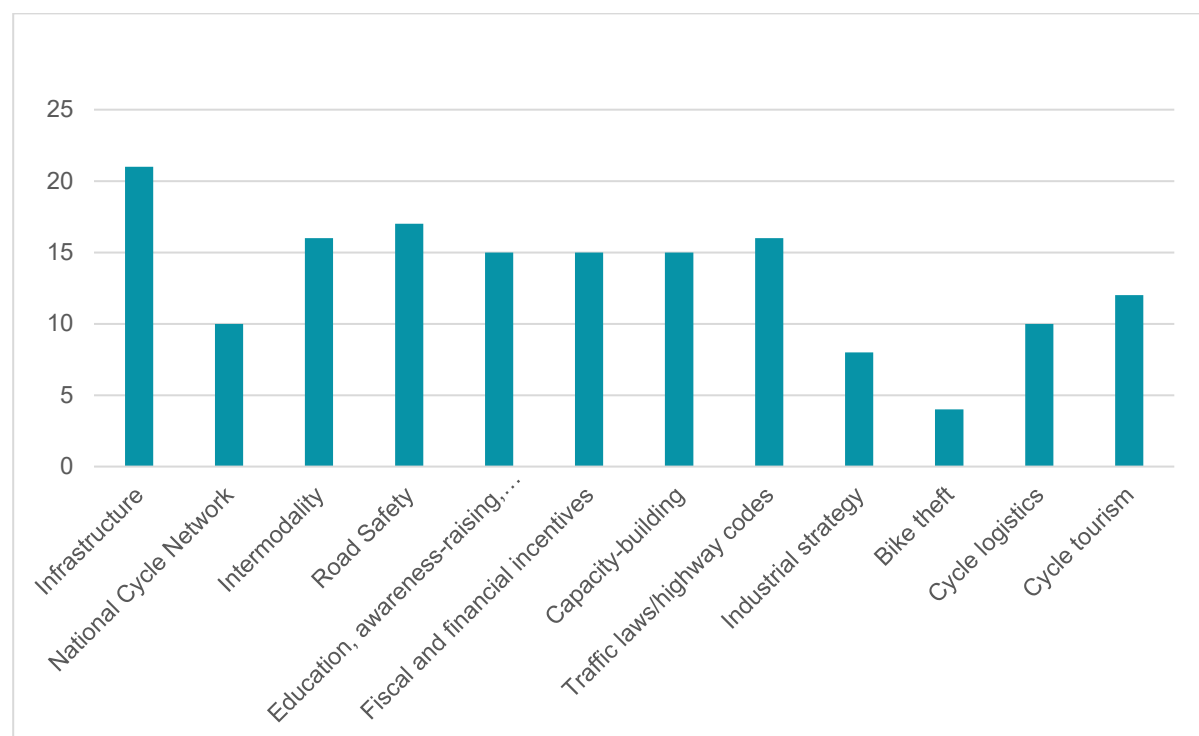


Figure 3: Prevalence of policy areas in specific strategies or similar documents (N=21)

## 2.5 EuroVelo in National Cycling Strategies

12 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, Croatia, Czechia, Finland, Germany, Hungary, Italy, Luxembourg and Spain. EuroVelo was also mentioned in the outdated strategies of Denmark, Latvia and Slovakia. EuroVelo's inclusion in these national cycling plans demonstrate its importance and relevancy regarding the improvement of cycling conditions in Europe and the role of national authorities in the development of both EuroVelo and national cycle route networks.

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 2012<sup>14</sup>. Furthermore, the Parliament estimated that the EuroVelo network will create €7 billion euros worth 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. In addition, Germany views cycling tourism as an important factor in regional economic development, particularly in more rural and economically weaker regions. The strategy is aiming for 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.
- In Hungary the four EuroVelo routes 6, 11, 13 and 14 are considered an important backbone of the national cycle network and will be further developed to a high standard.
- 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”.

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<sup>14</sup> [https://ecf.com/sites/ecf.com/files/EP\\_study\\_on\\_EuroVelo\\_network.pdf](https://ecf.com/sites/ecf.com/files/EP_study_on_EuroVelo_network.pdf)



- 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.

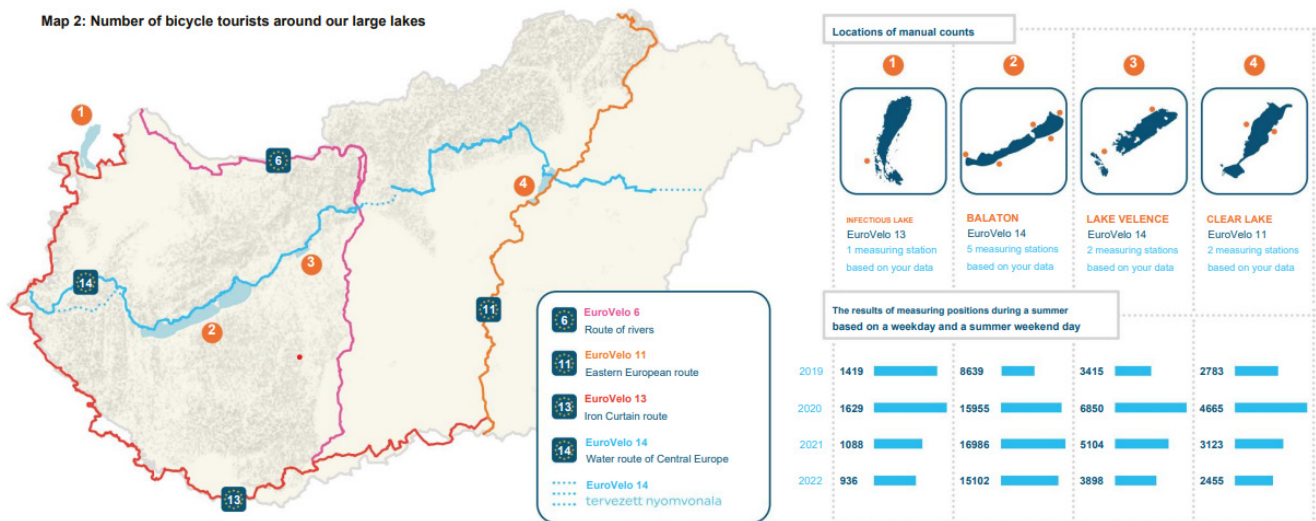


Figure 4: Visual presentation of EuroVelo routes in the Hungarian National Cycling Strategy 2030 (Google translated)



## 2.6 Central government investments

This compilation is building on the first attempt from our 2022 report to present a systematic overview of central government investments. The figures include three main sources:

- 1) Central government budgets, as announced in national cycling strategies or annual budget plans, for example;
- 2) EU funds from the 2014-2020 as well as 2021-2027 Multiannual Financial Framework periods;
- 3) and National Recovery and Resilience Plans under the EU Recovery and Resilience Facility.

### Key findings

Below figure compiles annual investment levels per capita to allow for better comparison.

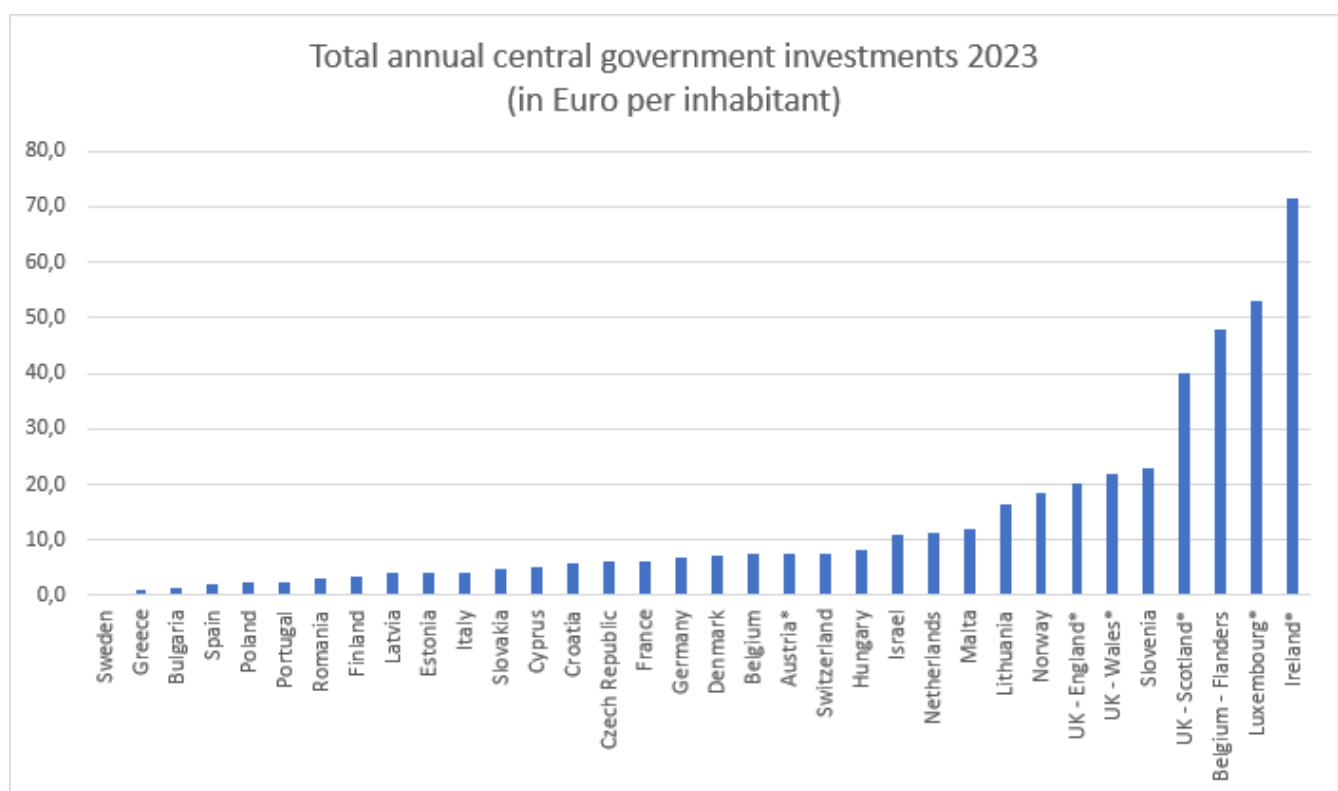


Figure 5: Total annual central government investments 2023 (in Euro per inhabitant)

**Ireland** is the top investor, allocating €360 million annually (€72 per capita) for active mobility projects. They are typically 100% funded grants implemented by local governments.

Runner-up is **Luxembourg** with some €26.6 million (€53 per capita) in investments for active mobility. Third in place comes the Belgian region of **Flanders** investing €319 million (€48 per capita) annually in cycle projects. Additional investments from local and regional governments, EU structural funds as well as a major chunk from Belgium's National Recovery and Resilience Plan bring total annual investments in cycling to about €80 euro per capita.

Fourth in place is **Scotland** with some €220 million per year (€40 per capita) for active travel. Looking ahead, the Scottish government has agreed that at least £320m (€373m) or 10% of the total transport budget will be allocated to active travel by the fiscal year 2024-25.

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

### **Additional remarks to figures presented**

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. In Ireland, for example, there is little to no co-funding from the local level to top up national 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 cycling projects) and non-ring-fenced investments (i.e., investments in cycling are optional under a wider active/sustainable mobility package. It is often impossible, it seems, to disaggregate just how much of overall spend is actually spent on cycling as part of those.
  - Several countries (e.g. England, Luxembourg, Ireland, Scotland, Switzerland and Wales) operate with active mobility (walking and cycling) budgets.
  - Austrian central government budgets include mobility management in addition to active mobility. In Norway, cycling investments are part of active mobility and public transport grants allocated to cities. In the Netherlands, €780 million had been reserved for the 2022-2025 period for projects related to housing projects but have yet to be translated into concrete project subsidies.
- There may exist considerable gaps between *planned/budgeted* investments and *actual* investments.
- Budgets often undergo considerable annual changes from one fiscal year to another. Where data is available, we present an average of three years (2022-2024) to even out lows as well as spikes.
- Investments from Operational Programmes are, strictly speaking, primarily EU investments, as the EU co-funding can be as high as 85% in Cohesion countries. 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 *spent* investments for the 2014-2020 period and *planned* investments for the 2021-2027 period, as published in ECF's 2023 analysis.<sup>15</sup>
- 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.

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<sup>15</sup> ECF: An analysis of cycling investments by EU Member States using EU Structural Funds, 2023. [https://ecf.com/system/files/ECF\\_Policy\\_Brief\\_EU\\_Structural\\_Funds\\_for\\_Cycling\\_Investments.pdf](https://ecf.com/system/files/ECF_Policy_Brief_EU_Structural_Funds_for_Cycling_Investments.pdf)

# 3. National cycling strategies in climate and energy policies

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 cycle tourism industry, etc.), they also serve global purposes, most notably the reduction in Greenhouse Gas emissions (GHG). 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. However, only 10 countries have so far included cycling in their NDC.<sup>16</sup>

At European level, a similar policy instrument exists: **National Energy and Climate Plans** (NECPs). Driven by the overall initial EU target of reducing CO<sub>2</sub> emissions 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-Emission Trading System (ETS) sectors, such as land transport, buildings, agriculture and waste. The European Commission published in 2020 a detailed EU-wide assessment of the final NECPs.<sup>17</sup> ECF carried out our own analysis of how cycling was taken into account by Member State NECPs.<sup>18</sup> 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.

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<sup>16</sup> Bangladesh, Bhutan, Chile, Columbia, Costa Rica, Ethiopia, Rwanda, Singapore, Uganda, Venezuela. PATH 2023 report. <https://pathforwalkingcycling.com/wp-content/uploads/PATH-UNFCCC-policies-report.pdf>

<sup>17</sup> [https://energy.ec.europa.eu/topics/energy-strategy/national-energy-and-climate-plans-necps\\_en](https://energy.ec.europa.eu/topics/energy-strategy/national-energy-and-climate-plans-necps_en)

<sup>18</sup> 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>

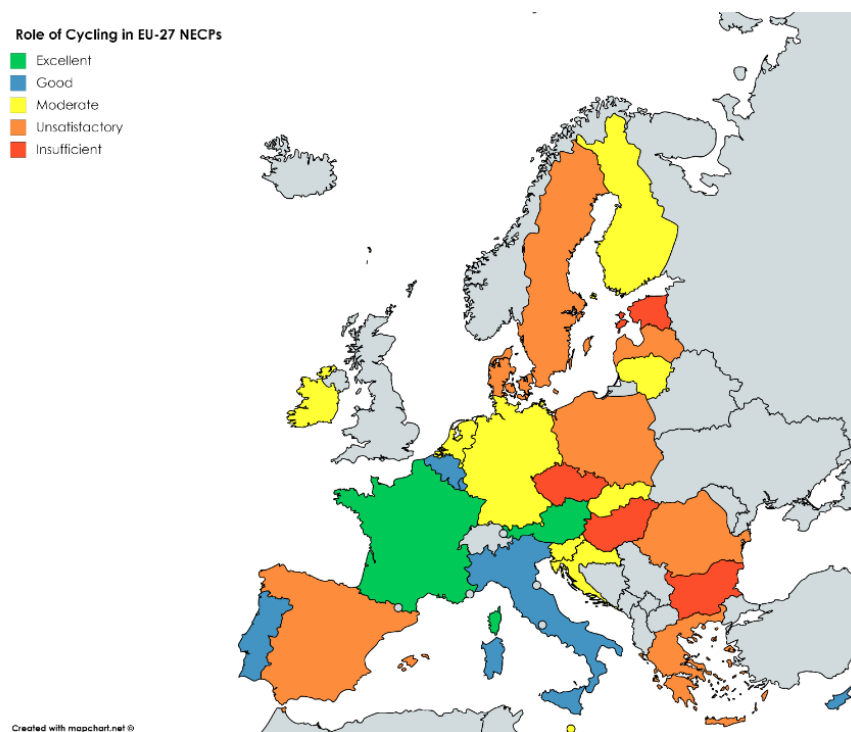


Figure 6: Role of Cycling in EU-27 National Energy and Climate Plans (2020)

With the EU Green Deal and the increased ambition to achieve higher GHG emission reduction targets of -55 % by 2030, Member States had to go back to the drawing board and submit updated draft NECPs to the European Commission by 30 June 2023. However, at the time of writing, five European countries have yet to submit their draft NECP to the European Commission.<sup>19</sup> ECF analysis will therefore only be incorporated in the 2024 edition of this report.

**ECF recommendation:** Member States should fully take cycling measures into account in the next generation of National Energy and Climate Plans, due in 2023/ 2024.

At national level, France is taking the lead to invest in cycling through energy-efficiency programmes. Some €275 million has been unlocked in the years 2018 – 2022, using energy efficiency certificates to finance programmes in bicycle parking, bicycle training and bike purchase subsidies, among other initiatives.<sup>20</sup>

<sup>19</sup> Belgium, Bulgaria, Ireland, Latvia, Poland. [https://commission.europa.eu/energy-climate-change-environment/implementation-eu-countries/energy-and-climate-governance-and-reporting/national-energy-and-climate-plans\\_en](https://commission.europa.eu/energy-climate-change-environment/implementation-eu-countries/energy-and-climate-governance-and-reporting/national-energy-and-climate-plans_en)

<sup>20</sup> <https://ecf.com/news-and-events/news/cycling-growing-steadily-france-energy-efficiency-programmes-provide-some>

# 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 was also a partner of the Danube Cycle Plans programme. Austria’s cycling strategy is nearing the end of its lifespan: Based on current data, it seems like the strategy will fail to reach its 13% mode share goal.

<b>Name</b>	<b>Masterplan Radfahren / Cycling Masterplan<sup>21</sup></b>
<b>Year(s)</b>	2015-2025
<b>Level of adoption</b>	Published by the Austrian Ministry of Agriculture, Forestry, Environment and Water Management
<b>No. of strategy iterations</b>	Third (previous: “Cycling Master Plan 2011-2015” and “Cycling Master Plan 2006”)
<b>Cycling share<sup>22</sup></b>	7% (2010)
<b>New Mobility Patterns Study<sup>23</sup></b>	7%
<b>Measurable objectives</b>	<b>Cycling share:</b> 13% (2025) <b>Road safety</b> (Austrian Road Safety Programme 2011-2020): 50% road deaths reduction; 40% serious injury reduction; 20% personal injury reduction
<b>Changes to traffic laws/highway code</b>	Further development of the road traffic regulations and adaptation of guidelines and standards at the federal level: <ul style="list-style-type: none"><li>- Anchoring the cycle path signposting</li><li>- Reform of the special priority rule for cyclists</li><li>- Setting one-way cycling streets in the local area as a standard, with the possibility of restriction</li><li>- Improving cycling for children.</li></ul>

<sup>21</sup> English version available at: [https://www.klimaaktiv.at/mobilitaet/radfahren/masterplan\\_RF\\_2025.html](https://www.klimaaktiv.at/mobilitaet/radfahren/masterplan_RF_2025.html)

<sup>22</sup> This always refers to the cycling share mentioned in the plan, if applicable.

<sup>23</sup> This refers to the percentage of trips under 300 km undertaken by bicycle in the Study on New Mobility Patterns. Data available at: [https://transport.ec.europa.eu/transport-themes/sustainable-transport/sustainable-transport-studies\\_en](https://transport.ec.europa.eu/transport-themes/sustainable-transport/sustainable-transport-studies_en)

<b>Promote intermodality</b>	Optimise the links with other means of transport. Make bicycle carriage on trains and buses more attractive
<b>Road safety</b>	<ul style="list-style-type: none"> <li>- Safety in numbers by increasing cycling share</li> <li>- Reduce fatalities and injuries</li> <li>- Improve cyclist visibility by updating the infrastructure manual</li> </ul>
<b>Fiscal and financial incentives</b>	<ul style="list-style-type: none"> <li>- Place the bicycle and the combination of bicycle and public transport on an equal footing with the car for long distance business trips</li> <li>- “Health premium” of at least 50 euro-cents per km to reward use of the bicycle</li> <li>- Remove distinction between partial and comprehensive commuter allowance</li> <li>- Tax incentives for bicycles</li> </ul>
<b>Capacity-building</b>	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
<b>Industrial strategy</b>	<ul style="list-style-type: none"> <li>- Intensification of the ministry’s research programmes focusing on cycling by connecting the bicycle industry, customers and research institutions.</li> <li>- Building a bicycle trade and industry network (Cycling Competence Austria).</li> </ul>
<b>Bike theft</b>	<ul style="list-style-type: none"> <li>- Minimum statutory criteria for bicycle parking, including that it is theft-proof</li> <li>- Research in the area of bicycle theft</li> <li>- Theft prevention of e-bikes</li> </ul>
<b>Cycle logistics</b>	Promotion of the transportation of passengers and goods by bicycle (cargo bicycles, trailers, e-bikes and trailers, e-cargo bikes)
<b>Cycle tourism</b>	Further develop Austria as a cycle tourism destination.

## Belarus

<b>Name</b>	Концепция развития велосипедного движения в Республике Беларусь <sup>24</sup> / National Concept for the Development of Cycling
<b>Year(s)</b>	2018
<b>Level of adoption</b>	Decision of the Permanent Commission on Road Safety under the Council of Ministers
<b>No. of strategy iterations</b>	First
<b>Cycling share</b>	-

<sup>24</sup> Belarussian version available at: <https://rovar.info/velokonczepczya/>

<b>New Mobility Patterns - Study</b>	
<b>Measurable objectives</b>	<ul style="list-style-type: none"> <li>- Reduction in both cyclists injured in traffic accidents and cyclist road fatalities by at least 25% by 2030 compared to 2018;</li> <li>- Increase the share of bicycle trips (primarily for utilitarian purposes) in cities with a population of &gt;50,000 to 8-10%, in cities with a population of &lt;50,000 to 15-20%, in agro-towns and rural settlements to over 40%</li> </ul>
<b>Changes to traffic laws/highway code</b>	Adjustment of technical regulatory legal acts with the aim of adapting existing highways between settlements for cycling needs, aimed primarily at improving the safety of cyclists on the roads in different seasons of the year, taking into account weather conditions
<b>Promote intermodality</b>	Enable transportation of bicycles on urban, suburban and intercity transportation
<b>Road safety</b>	<ul style="list-style-type: none"> <li>- Gather data about accidents involving cyclists and pedestrians</li> <li>- Consideration of cycling issues during special road safety audits of road infrastructure projects</li> </ul>
<b>Education, awareness-raising and promotion</b>	<ul style="list-style-type: none"> <li>- Educate both children and adults on safe cycling</li> <li>- Preventive work with cyclists who violate the rules of the road</li> <li>- Promotion, including in educational institutions and collectives of workers, on the safe behaviour of cyclists on the public network of streets and highways, with the active participation in this work of local executive and administrative bodies and the media</li> <li>- Events and promotional campaigns</li> </ul>
<b>Cycle tourism</b>	More active development of cycling tourism

## Belgium

The first-ever Belgian cycling action plan on the federal level was adopted in 2021. Most competences have been transferred to the three regions (Flanders, Wallonia, Brussels-Capital Region), therefore 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 plan consists of 52 measures categorised across three main axes. These three axes are: 1) Facilitating practical and convenient access to bicycles; 2) Improving infrastructure safety and comfort (with the emphasis on theft prevention); 3) Making the bicycle option obvious and normal, as well as an additional group of supporting measures. 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. 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.

<b>Name</b>	<b>BE CYCLIST - Plan d'Action pour la Promotion du Vélo du gouvernement fédéral 2021-2024<sup>25</sup> / 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</b>
<b>Year(s)</b>	2021-2024
<b>Level of adoption</b>	Federal government – approved by the Council of Ministers and supported by the Prime Minister
<b>No. of strategy iterations</b>	First
<b>Cycling share</b>	-
<b>New Mobility Patterns Study</b>	10%
<b>Measurable objectives</b>	
<b>Changes to traffic laws/highway code</b>	Adapt the Highway Code
<b>Promote intermodality</b>	<ul style="list-style-type: none"> <li>- Improve the bicycle and train combination in SNCB trains (national rail company)</li> <li>- Facilitate the development of cycle routes along the rails</li> </ul>
<b>Fiscal and financial incentives</b>	Kilometre based bicycle allowance for trips between home and work
<b>Bike theft</b>	<ul style="list-style-type: none"> <li>- Evaluate the creation of a bicycle registry</li> <li>- Combat the resale of stolen bicycles</li> <li>- Update the “Bike Theft Manual”</li> <li>- Include the fight against bicycle theft in the new version of the comprehensive security framework note</li> </ul>
<b>Cycle logistics</b>	Make parcel deliveries more sustainable using e.g. cargo bicycles

<sup>25</sup> French version available at:

[https://mobilit.belgium.be/sites/default/files/documents/publications/2022/plan\\_daction\\_velo\\_becyclist\\_2021-24\\_fr.pdf](https://mobilit.belgium.be/sites/default/files/documents/publications/2022/plan_daction_velo_becyclist_2021-24_fr.pdf)



# 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)<sup>26</sup> 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. 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.

<b>Name</b>	<b>Σχεδίου Δράσης Προώθησης της Χρήσης του Ποδηλάτου για την περίοδο 2021-2023 / Action Plan for the Promotion of Bicycle Use 2021-2023</b>
<b>Year(s)</b>	2021-2023
<b>Level of adoption</b>	Governmental
<b>No. of strategy iterations</b>	First
<b>Cycling share</b>	-
<b>New Mobility Patterns Study</b>	1%
<b>Measurable objectives</b>	-
<b>Changes to traffic laws/highway code</b>	<ul style="list-style-type: none"> <li>- Reduction of the speed limit to 30 km/h in neighbourhoods and in historic or special cores, as well as in city centres</li> <li>- Traffic regulations for cyclists, such as a suitable signalling system and traffic lights to ensure continuous flow</li> <li>- Update of markings and standards.</li> </ul>
<b>Promote intermodality</b>	Free transport of bicycles by public transport vehicles
<b>Fiscal and financial incentives</b>	Incentive plan and subsidy for the purchase of a new bicycle and a subsidy for the repair and maintenance of a bicycle
<b>Capacity-building</b>	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.

<sup>26</sup> Greek version available at: [Action Plan for the Promotion of the Use of the Bicycle 2021 - 2023 | Yiannis Karousos](#)

# Croatia

The first Croatian national cycling strategy was developed as part of the Danube Cycle Plans Project and officially adopted in July 2023, hereby becoming the first country in Southeastern Europe to do so. The strategy envisions the increase in the use of bicycles for daily commuting and travel as well as an improvement in the safety of cyclists. It covers the period from 2023 to 2027 and includes a total investment of €166.7 million.

<b>Name</b>	<b>Nacionalni Plan Razvoja Biciklističkog Prometa Za Razdoblje Od 2023. Do 2027. Godine/ National Plan Development of Cycling Traffic for the period from 2023-2027<sup>27</sup></b>
<b>Year(s)</b>	2023-2027
<b>Level of adoption</b>	Approved by Ministry of Sea, Traffic and Infrastructure
<b>No. of strategy iterations</b>	First
<b>Cycling share</b>	5%
<b>New Mobility Patterns Study</b>	7%
<b>(Measurable) objectives</b>	<ul style="list-style-type: none"> <li>- Increasing the use of bicycles for daily commuting and travel.</li> <li>- Reducing the number of killed cyclists by 50% by 2030</li> </ul>
<b>Infrastructure</b>	<ul style="list-style-type: none"> <li>- Building more than 850 km of additional bicycle roads alongside local, regional and state roads</li> <li>- Define national guidelines for the development of bicycle traffic on the regional and local level</li> <li>- Determine a list of key projects at the national level</li> </ul>
<b>Changes to traffic laws/highway code</b>	Amend/ improve the legal framework that affects the safety of cyclists
<b>Road safety</b>	Detect and reduce the number of dangerous locations and sections for cyclists
<b>Education</b>	Improve the knowledge and driving skills of all groups of cyclists in road traffic through national media campaigns

<sup>27</sup> <https://mmpi.gov.hr/infrastruktura/biciklisticka-infrastruktura/nacionalni-plan-razvoja-biciklistickog-prometa-za-razdoblje-od-2023-do-2027-godine/24099>

# Czechia

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 along with Belarus, 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.

<b>Name</b>	<b>Urban and Active Mobility Concept 2021-2030<sup>28</sup>; Transport Policy of the Czechia period 2021 - 2027</b>
<b>Year(s)</b>	2021-2030
<b>Level of adoption</b>	Approved by the Government
<b>No. of strategy iterations</b>	Third (previous: "Czech National Cycling Development Strategy 2013-2020")
<b>Cycling share</b>	-
<b>New Mobility Patterns Study</b>	5%
<b>Measurable objectives</b>	Cycling mode share goals according to city size and season: >500,000: 2-7% 250,000-500,000: 5-10% 75,000-250,000: 10-15% 42,000-75,000: 10-20% 25,000-42,000: 15-25% Up to 25,000: 20-30%
<b>Development of a national cycle network</b>	Follow up support of the network of superior cycle paths
<b>Intermodality</b>	Expand Bike&Ride system
<b>Road safety</b>	<ul style="list-style-type: none"> <li>- Address the issue of motor vehicles entering cycle paths</li> <li>- Ensure the development of ITS to increase the safety of cyclists in road traffic</li> </ul>
<b>Changes to traffic laws/highway code</b>	Submit a legislative proposal regulating the operation of e-bikes
<b>Cycle logistics</b>	Implementation of urban logistics context utilising e.g. e-cargo bikes

<sup>28</sup> Czech version available at: <https://www.akademimobility.cz/koncepce-560>

# Denmark

Denmark has adopted two cycling strategies in the past: The “More bikes on the road”-strategy in 2007, and the “Denmark – on your bike!” strategy in July 2014. Regrettably, there seem to be no ambitions to update the strategy.

The outdated Danish cycling strategy has therefore been removed from the report in order to accurately reflect the current state of cycling strategies and ambitions in each country. Further information on the expired strategy can still be found in our previous reports.

# Finland

“Kävelyn ja pyöräilyn edistämishjelma” is Finland’s first national cycling strategy with the goal to increase cycling and walking trips by 30% by 2030. 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.

<b>Name</b>	<b>Kävelyn ja pyöräilyn edistämishjelma / Walking and cycling promotion program<sup>29</sup></b>
<b>Year(s)</b>	2018-2023
<b>Level of adoption</b>	Ministry of Transport and Communications
<b>No. of strategy iterations</b>	First <sup>30</sup>
<b>Cycling share</b>	8%
<b>New Mobility Patterns Study</b>	10%
<b>Measurable objectives</b>	30% increase in walking and cycling
<b>Development of a national cycle network</b>	Improve the state-maintained national bike path network. This network consists of routes between cities and urban areas that serve long-distance bicycle traffic.
<b>Road safety</b>	Take road safety into account in planning the entire transport system.
<b>Promote intermodality</b>	City bike systems are integrated with public transport.

<sup>29</sup> 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>

<sup>30</sup> Earlier cycling plans listed in the 2021 edition were not politically adopted and hence do not qualify as national cycling strategies under ECF terminology.

<b>Fiscal and financial incentives</b>	Examine the tax system for opportunities to make active mobility more attractive than cars.
<b>Capacity-building</b>	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.
<b>Changes to traffic laws/highway code</b>	<ul style="list-style-type: none"> <li>- 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.</li> <li>- Minor road traffic violations will be dealt with under the administrative sanction system.</li> <li>- Two-way cycling could be allowed on some one-way streets.</li> </ul>
<b>Industrial strategy</b>	Examine the possibility of including bicycle mechanic training in basic training in the vehicle industry.
<b>Cycle tourism</b>	<p>Systematically develop bicycle tourism:</p> <ul style="list-style-type: none"> <li>- Mark EuroVelo and other routes for tourism purposes</li> <li>- Ensure sufficient funding for mountain bike trails</li> </ul>

## France

The French plan, announced by Prime Minister Elisabeth Borne in May 2023, is based around three ambitions: 1) Making cycling accessible to everyone from an early age and throughout their lives; 2) Make cycling and walking an attractive alternative to the car for local journeys and combined with public transport for long-distance journeys distances; 3) Make cycling a lever for the French economy by supporting French players in the sector. to give every French person access to clean mobility.

To achieve said ambitions, the French cycle route network is to double by 2030; existing bicycle purchase schemes will be extended in time and to second-hand bicycles; 850,000 children will be trained annually by the year 2027 to safely cycle to school.<sup>31</sup> Alongside promoting cycle use, France also has strong industrial ambitions with the objective of producing two million bicycles by 2030.

Chaired by the Prime Minister the announcement of the plan was followed by a first Interministerial meeting on cycling.

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<sup>31</sup> Press release: [https://www.ecologie.gouv.fr/sites/default/files/23100\\_DP-Plan-velo-2023.pdf](https://www.ecologie.gouv.fr/sites/default/files/23100_DP-Plan-velo-2023.pdf)

<b>Name</b>	<b>Plan Vélo &amp; Marche 2023-2027 / Cycling &amp; Walking Plan 2023-2027</b>
<b>Year(s)</b>	2023-2027
<b>Level of adoption</b>	Adopted by the government
<b>No. of strategy iterations</b>	Third (previous: "Plan National Vélo 2012-2020"; Plan Vélo 2018-2024)
<b>Cycling share</b>	3% (2018)
<b>New Mobility Patterns Study</b>	5%
<b>Measurable objectives</b>	Triple the modal share of cycling to reach 9% by 2024 and 12% by 2030
<b>Changes to traffic laws/highway code</b>	<p>Changes in the Highway Code in favour of active mobility by the end of 2019:</p> <ul style="list-style-type: none"> <li>- Provision of reserved parking spaces on the road</li> <li>- Advanced stop lines at traffic lights</li> <li>- Contraflow cycling</li> <li>- Authorisation to wear glare-free lighting devices not currently authorised</li> <li>- Allow two abreast cycling in zone 30 km/h and low traffic areas</li> <li>- Heavy goods vehicles to have installed specific equipment that detects and warns of the presence of vulnerable users</li> <li>- 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.</li> </ul>
<b>Promote intermodality</b>	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.
<b>Education, awareness-raising and promotion</b>	"Savoir rouler à vélo" is a programme that offers supervised training of ten hours to children in the age range of 6 to 11 years old. In total this concerns approximately 850,000 children.
<b>Fiscal and financial incentives</b>	Renew the bicycle purchase subsidy program
<b>Industrial strategy</b>	<ul style="list-style-type: none"> <li>- Create a real bicycle industry, from assembly to recycling, including repair and services</li> <li>- Support the General Assembly of bicycle stakeholders</li> <li>- Encourage research and innovation</li> <li>- Increase the number of bicycle assembled in France to one million per year</li> <li>- France vélo label to promote the French bicycle industry</li> </ul>

## Germany

The National Cycling Plan is the Federal Government’s strategy for the promotion of cycling in Germany. It is 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 are 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.

<b>Name</b>	<b>Nationaler Radverkehrsplan 3.0 / National Cycling Plan 3.0<sup>32</sup></b>
<b>Year(s)</b>	2021-2030
<b>Level of adoption</b>	Federal Government
<b>No. of strategy iterations</b>	Third (previous: “National Cycling Plan 2020 – Joining forces to evolve cycling – 2013”, “National Cycling Plan 2002-2012 – Ride your bike!”)
<b>Cycling share</b>	11% (2017)
<b>New Mobility Patterns Study</b>	11%
<b>Measurable objectives</b>	<p>By 2030 compared with 2017:</p> <ul style="list-style-type: none"> <li>- Distance travelled by bicycle to double (112 km/day to 224)</li> <li>- No. of trips to increase from 120 per year per person to 180</li> <li>- Average length of trips to increase from 3.7 to 6 km</li> </ul> <p>By 2030 compared with 2019:</p> <ul style="list-style-type: none"> <li>- Share of Germans who plan on cycling to increase from 41% to 60%</li> <li>- 40% reduction in the number of cyclists fatalities</li> <li>- Raise the aggregated financial support for cycling in all levels of government (local, county, regional, federal) from €11 to €30 per capita</li> <li>- At least 50% of users to rate the quality of bicycle transport on public transport positively</li> </ul>

<sup>32</sup> [https://bmdv.bund.de/SharedDocs/DE/Anlage/StV/nationaler-radverkehrsplan-3-0-en.pdf?\\_\\_blob=publicationFile](https://bmdv.bund.de/SharedDocs/DE/Anlage/StV/nationaler-radverkehrsplan-3-0-en.pdf?__blob=publicationFile)

<b>Development of a national cycling network</b>	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
<b>Changes to traffic laws/highway code</b>	<ul style="list-style-type: none"> <li>- 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</li> <li>- Review the obligation to use cycle lanes for cargo bikes and the right to use cycle lanes outside urban areas for pedelecs</li> <li>- Strengthen the legal framework for commercial bicycle use, with the clarification of the technical regulations for cargo bikes</li> <li>- 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</li> </ul>
<b>Promote intermodality</b>	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
<b>Road safety</b>	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)
<b>Capacity building</b>	The Bicycle Academy organises seminars and training courses, especially for employees in local authorities
<b>Fiscal and financial incentives</b>	Examine the option of applying a reduced VAT rate for bicycle purchases and bicycle-related services
<b>Industrial strategy</b>	Further grow the sector by attracting skilled workers to it
<b>Cycle logistics</b>	<ul style="list-style-type: none"> <li>- Provide attractive financing options and guarantees to help establish commercial fleet solutions</li> <li>- Advance the development of cycle logistics through research funding</li> <li>- Set an example in the public sector</li> <li>- Review rules for compulsory use of cycle lanes for cargo bikes</li> <li>- Expand cargo bike sharing</li> </ul>
<b>Cycle tourism</b>	Promote cycle tourism as an important part of regional economic development, especially in structurally weak regions and as a central element of sustainable urban tourism in cities.





# Hungary

Hungary is a “hidden champion” of cycling in Europe, with a cycling mode share of 16% in 2021. This makes Hungary the biggest cycling nation in the EU after the Netherlands. It’s new national cycling strategy, adopted on 31 October 2023, builds on that legacy and underpins its ambition to stay the most cycle-friendly country in Central and Eastern Europe. In 2030, cycling will be fast, safe and accessible, making it an attractive alternative for everyday transport and the most popular leisure activity. This should lead to an increase in the number of cyclists in urban areas and maintain the current high levels in rural areas. 35% of the population will use bicycles several times a week as their main means of transportation.

The strategy is built around four main pillars: everyday cycling; cycle tourism; road safety and horizontal measures, such as monitoring, research and investments. It includes a total of 29 measures, with indicators, activities, a list of organisations involved, estimated costs and the implementation schedule. The resources required for implementation are estimated at HUF 247.97 billion (€650 million).

<b>Name</b>	<b>Nemzeti Kerékpáros Stratégia 2030/ National Cycling Strategy 2030<sup>33</sup></b>
<b>Year(s)</b>	2023-2030
<b>Level of adoption</b>	The National Cycling Strategy was prepared at the request of the Minister of State for Active Hungary by the Active and Ecotourism Development Centre, a non-profit organisation, and adopted by the government.
<b>No. of strategy iterations</b>	Second (previous: “National Cycling Programme Hungary 2014-2020”)
<b>Cycling share</b>	-
<b>New Mobility Patterns Study</b>	16%
<b>Measurable objectives</b>	<ul style="list-style-type: none"> <li>- 35% of the population will use bicycles several times a week as their main means of transportation by 2030.</li> <li>- 50% decrease in the number of fatal accidents by 2030 compared to 2022.</li> </ul>
<b>Infrastructure</b>	<ul style="list-style-type: none"> <li>- Creating and improving infrastructure conditions for bicycle and pedestrian traffic in all major cities.</li> <li>- Building independent/protected cycle tracks as part of the main settlement network, where justified/necessary.</li> </ul>
<b>National cycle network</b>	Creating a total of 15,000km long attractive cycle network, including the EuroVelo routes.

<sup>33</sup> <https://aofk.hu/nemzeti-kerekparos-strategia-2030/>

<b>Changes to traffic laws/highway code</b>	Creating a regulatory environment for cycle highways and for cycle streets.
<b>Promote intermodality</b>	<ul style="list-style-type: none"> <li>- Providing 50,000 bicycle parking spaces at public transport hubs.</li> <li>- Improving conditions for bicycle carriage on public transport. Increasing rolling stock capacity to popular destinations, such as Lake Balaton.</li> </ul>
<b>Education, awareness-raising and promotion</b>	<ul style="list-style-type: none"> <li>- Advertising nationwide communication campaigns with positive messages about cycling. Targeted communication campaigns for rural settlements to maintain cycling for woman, children and seniors.</li> <li>- All 4<sup>th</sup> grade students to receive theoretical and practical education in traffic knowledge by 2025. By 2030, at least 30% of that age group receive practical bicycle traffic training.</li> </ul>
<b>Road safety</b>	Creating safe conditions on the entire bicycle network by further developing the traffic safety auditing system, creating action groups for traffic safety audits, reevaluating regulations on speed limits.
<b>Capacity building</b>	Creating a cycling knowledge centre. Setting up a “Cycling Professor” Programme hereby assisting universities to integrate cycling transportation into their curriculum.
<b>Fiscal and financial incentives</b>	Introducing fiscal incentives for employees as well as employers to stimulate cycling to work.
<b>Industrial strategy</b>	Creating a national bicycle cluster.
<b>Cycle tourism</b>	<ul style="list-style-type: none"> <li>- Developing as many EuroVelo routes as possible to a high standard.</li> <li>- Building an up-to-date, open database of cycling routes and services.</li> <li>- Supporting the creation of 3,000 bicycle-friendly service providers and ten bicycle centres nationwide.</li> <li>- Organising an annual large cycling tourism festival.</li> </ul>

# Ireland

Ireland's first cycling strategy was replaced with a broader sustainable mobility policy in 2022. While the strategic framework of the vision extends to 2030, the action plan covers the years up until 2025. The action plan contains a clear set of actions for each goal, including the parties responsible for implementation, timeframes and output goals.

<b>Name</b>	<b>National Sustainable Mobility Policy<sup>34</sup></b>
<b>Year(s)</b>	2022-2025/2030
<b>Level of adoption</b>	Department of Transport, the policy was developed through public consultation and extensive stakeholder and cross-government engagement
<b>No. of strategy iterations</b>	Second (previous: "Ireland's First National Cycle Policy Framework")
<b>Cycling share</b>	2% (2019)
<b>New Mobility Patterns Study</b>	4%
<b>Measurable objectives</b>	<ul style="list-style-type: none"> <li>- at least 500,000 additional daily active travel and public transport journeys</li> <li>- 10% reduction in kilometres driven by fossil fuelled cars by 2030</li> </ul>
<b>Development of a national cycling network</b>	Develop and publish a strategic national cycle network
<b>Changes to traffic laws/highway code</b>	Conduct a review of road traffic policy and legislation to prioritise the safety of walking and cycling.
<b>Promote intermodality</b>	<ul style="list-style-type: none"> <li>- Rollout a new multi-modal National Journey Planner</li> <li>- Expand shared bike services at transport hubs and interchanges</li> </ul>
<b>Road safety</b>	<ul style="list-style-type: none"> <li>- Deliver an average of 60 road safety improvement schemes and fund an average of four minor realignment schemes on national roads per year, to create forgiving roadsides, self-explaining roads, and a safe environment for vulnerable road users.</li> <li>- Expand speed management measures on roads at appropriate high-risk locations</li> <li>- Further develop camera-based enforcement, including at junctions and for management cycle lanes</li> </ul>

<sup>34</sup> Strategy and action plan available at: <https://www.gov.ie/en/publication/848df-national-sustainable-mobility-policy/>

<b>Capacity building</b>	Expand continuous professional training for key design skills and application of national standards.
<b>Fiscal and financial incentives</b>	Conduct a study to assess incentives to encourage greater use of active travel as a mode of transport, including an assessment of international best practice.

## Israel

Israel's first national cycling plan was adopted in 2022. With only 15-20% of the national cycling network realised, the plan aims to optimise cycling infrastructure development over the next two decades, aligning with the government's sustainable mobility strategy of 2041, targeting a 10% bicycle share. The plan focuses on three main areas:

**Budgetary:** It allocates ILS 7.75 billion (€2 billion) for 2021-2041.

**Organisational:** The plan establishes oversight and control projects, enhancing coordination mechanisms and monitoring tools for informed decision-making while streamlining planning among various implementing bodies to create a seamless cycling network.

**Planning:** The plan supports the creation of metropolitan cycling networks for prioritised implementation, introduces a national cycling potential model to guide development, and provides official planning manuals for planners and local authorities to elevate planning and control standards.

This comprehensive approach is crucial in achieving the government's cycling goals and sustainable mobility objectives by 2041.

<b>Name</b>	תכנית לאומית לתשתיות רכיבה / A National Action Plan for cycling infrastructure <sup>35</sup>
<b>Year(s)</b>	2021-2041
<b>Level of adoption</b>	Published by the Israeli Ministry of Transportation and Road Safety
<b>No. of strategy iterations</b>	First
<b>Cycling share</b>	1% (2017)
<b>New Mobility Patterns Study</b>	-
<b>Measurable objectives</b>	- Cycling share: 10%

<sup>35</sup> <https://www.gov.il/BlobFolder/policy/infrastructures-19-12/he/infrastructures.pdf>

- The installation of cycling infrastructure along 3,595 km of existing roadways (2,000 km within the initial decade)

### Infrastructure

- Formulating plans for four Metropolitan Cycling Networks designed for commuting and facilitating travel to educational institutions.
- Establishing an accessible GIS dataset for present and prospective cycling routes, with detailed specifications.
- Developing an advanced planning toolkit for cycling infrastructure, which includes a comprehensive nationwide cycling potential model.
- Publishing official guidelines for integrating new cycling infrastructure into existing streets, constructing and maintaining strategic cycle paths, and outlining the standard specifications and associated costs of cycling infrastructure.
- Designing a nationwide cycling monitoring action plan.
- Revising the provision of last/first-mile parking facilities for micro-mobility at transit stations.

## Italy

In 2022, Italy adopted its first cycling strategy called the General Plan of Cycling Mobility 2022-2024, including a €1.154 billion investment, including €600 million from the National Recovery and Resilience Plan (NRRP). The strategy was approved by then 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 the 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.

In 2023 the new government however proposed to cut funding by two thirds from the NRRP and leave only €200 million for cycling investments.<sup>36</sup>

<b>Name</b>	<b>Piano Generale della Mobilità Ciclistica urbana e extraurbana 2022-2024 / General Plan for Urban and Extra-urban Cycling Mobility 2022-2024<sup>37</sup></b>
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<sup>36</sup> <https://ecf.com/news-and-events/news/nextgenerationeu-and-cycling-recovery-investments-being-carried-out-across>

<sup>37</sup> <https://aliautonomie.it/wp-content/uploads/2022/08/PG-Mobilita-Ciclista-e-allegati.pdf>

<b>Year(s)</b>	2022 - 2024
<b>Level of adoption</b>	Minister of Infrastructure and Sustainable Mobility
<b>No. of strategy iterations</b>	First
<b>Cycling share</b>	-
<b>New Mobility Patterns Study</b>	6%
<b>Measurable objectives</b>	<ul style="list-style-type: none"> <li>- 20% increase of the cycling modal share of provincial capitals/metropolitan cities.</li> <li>- Increase the density of cycling infrastructures in provincial capitals/metropolitan cities to the national average value of 32 km per 100 km<sup>2</sup>.</li> <li>- 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.</li> </ul>
<b>Promote intermodality</b>	<ul style="list-style-type: none"> <li>- Increasing the possibility to carry bicycles on public transport, especially trains</li> <li>- Designated bike rails along the flights of stairs of the access paths to the platforms</li> <li>- Bike sharing stations near public transport stops</li> <li>- Construction of covered and guarded shelter for bicycles at 50% of public transport stations.</li> </ul>
<b>Changes to traffic laws/highway code</b>	<ul style="list-style-type: none"> <li>- 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.</li> <li>- Interventions in signage along cycle paths and crossings leading to schools.</li> <li>- The affixing of directional arrows indicating the direction of travel of the lane, especially when there is only one lane.</li> <li>- Implement speed management interventions (30 km/h zones, etc.)</li> </ul>
<b>Industrial strategy</b>	Make cycling a driver of green goods and services to achieve industrial reshoring
<b>Cycle logistics</b>	Incentivise bicycle logistics by evaluating and identifying barriers to their use
<b>Cycle tourism</b>	<ul style="list-style-type: none"> <li>- Create a network of interconnected long-distance cycle routes that connect regions and provinces</li> <li>- Promote intermodality between bicycles and public transport to facilitate tourism</li> </ul>

## Latvia

Latvia had previously adopted a “Bicycle Development Plan”, which was valid from 2018 to 2020. Regrettably, it has not been replaced since and there seem to be no ambitions to do so. The outdated Latvian cycling strategy has therefore been removed from the report in order to accurately reflect the current state of cycling strategies and ambitions in each country. Further information on this strategy can still be found in our previous reports.

## Liechtenstein

Liechtenstein does not have a dedicated cycling strategy, but rather a mobility concept that encompasses all modes of transport: Individual motorised mobility, public transport, active mobility and cargo transport. Liechtenstein especially struggles with its high rate of motorisation, the highest in Europe. The concept has four main focal points of intervention: 1) A push for public transport, 2) Increasing the efficiency of the transport system, 3) Increasing capacity, and 4) Increasing the safety of the transport system.

Name	Mobilitätskonzept 2030 / Mobility Concept 2030 <sup>38</sup>
Year(s)	2020-2030
Level of adoption	Government
No. of strategy iterations	First
Cycling share	3.2% (2015)
New Mobility Patterns Study	-
Measurable objectives	Cycling network of around 80 km
National cycle network	<ul style="list-style-type: none"> <li>- Close 7.5 km of known gaps</li> <li>- Reevaluate and standardise signage throughout the country</li> </ul>
Promoting intermodality	Improve links between the bicycle network and public transport by <ul style="list-style-type: none"> <li>- installing bicycle parking at stations</li> <li>- offering bike rental at stations</li> <li>- improving bicycle carriage on public transport</li> </ul>
Road safety	Improve the safety of cycle paths, considering also the specific needs of e-bikes

<sup>38</sup> German version available at: [https://www.mobilitaet2030.li/application/files/8915/8826/4959/Mobilitatskonzept\\_2030.pdf](https://www.mobilitaet2030.li/application/files/8915/8826/4959/Mobilitatskonzept_2030.pdf)



**Fiscal and financial incentives**

Mobility bonus for environmentally friendly transport choices in the form of tax deductions, discounts on public transport, discounts on insurance

**Cycle tourism**

Use the international cycle network to attract tourists

## Luxembourg

In 2022, the Grand Duchy of Luxembourg published an updated national mobility plan focused on sustainability, following the Soft Mobility National Active Plan (2008) and Mobilité Durable (MoDu: 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 2018 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.

<b>Name</b>	<b>PNM 2035: National mobility plan<sup>39</sup></b>
<b>Year(s)</b>	2022-2035
<b>Level of adoption</b>	Ministry of Mobility and Public Works
<b>No. of strategy iterations</b>	Fourth (previous: “Soft mobility national action plan 2008”, “Mobilité Durable 2012- 2018”, “MoDu 2.0, 2018-2025”).
<b>Cycling share</b>	2% (2017)

<sup>39</sup> English version available at: <https://transports.public.lu/fr/publications/strategie/pnm-2035-brochure/pnm-2035-brochure-en.html>

<b>New Mobility Patterns Study</b>	3%
<b>Measurable objectives</b>	<p><b>Cycling share:</b> 11% (2035)</p> <p><b>Cycle commute share by 2025:</b> 10% home-to-work (currently at 5%), 15% home-to-school (currently 3%)</p> <p><b>Modal share of car trips:</b> Decrease of 25% from 2017- 2035 (starting from 46%)</p>
<b>National cycle network</b>	Continue developing the network to a high standard
<b>Promoting intermodality</b>	Provide fast and direct routes to the heart of metropolitan cities from a radius of at least 15 km adapted to a speed of 25 km/h.
<b>Road safety</b>	Introduce a lateral passing distance of 1.5m when overtaking
<b>Fiscal and financial incentives</b>	Reevaluate subsidies for private car usage
<b>Changes to traffic laws/highway code</b>	<ul style="list-style-type: none"> <li>- Adopting law to further secure the national cycling network and to introduce the notion of the “express cyclable track”</li> <li>- Implement crossing sidewalks, non-compulsory cycle paths, cycling streets and traffic calming measures in neighbourhoods</li> </ul>
<b>Cycle tourism</b>	Providing cycling access to all tourist regions and connecting them to international tourism routes, like EuroVelo 5

## Netherlands

In the Netherlands, functional cycling is the most developed at European and global level, as testified by 28% of people that indicated bicycle as their main mode of transport for daily travel, as reported by the New Mobility Patterns Study.

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 France 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: the Tour de Force.<sup>40</sup> In 2017, this resulted in the joint Bicycle Agenda 2017-2020.

In July 2022, the then 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

<sup>40</sup> Dutch version: <https://www.fietsberaad.nl/getmedia/b46be2c8-d935-412d-9888-c79f6d4dc349/Ambitiedocument-Tour-de-Force-2e-etappe-Schaalsprong-Fiets.pdf.aspx>

plan is called “Nationaal Toekomstbeeld Fiets”, which translates to “National Vision Cycling”, and is in collaboration with Tour de Force.

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.

<b>Name</b>	<b>Nationaal toekomstbeeld Fiets / National Vision Cycling<sup>41</sup></b>
<b>Year(s)</b>	2022-2025
<b>Level of adoption</b>	Central Government
<b>No. of strategy iterations</b>	Third
<b>Cycling share</b>	27%
<b>New Mobility Patterns Study</b>	28%
<b>Measurable objectives</b>	Increase the number of kilometres travelled by bicycle by 20% (2027)
<b>Promoting intermodality</b>	<ul style="list-style-type: none"> <li>- Improve the link between the bicycle network and public transport by renovating or constructing additional bicycle-parking facilities at railway stations</li> <li>- Encourage and expand parking facilities for bicycles and (shared) bicycles supply at public transport hubs</li> <li>- Provide knowledge and expertise to boost the availability of services at public transport hubs</li> </ul>
<b>Road safety</b>	Ensure satisfactory representation of cycling in the “Strategisch Plan Verkeersveiligheid 2030” (Road Safety Strategic Plan)
<b>Fiscal and financial incentives</b>	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.
<b>Capacity building</b>	Actively sharing national knowledge and experience related to active mobility through public diplomacy. Making cycling an important topic in international bilateral and trade relations

<sup>41</sup> Dutch version: [nationaal-toekomstbeeld-fiets-en-fietsambitie-22-25.pdf \(overheid.nl\)](https://overheid.nl/nationaal-toekomstbeeld-fiets-en-fietsambitie-22-25.pdf)

## 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 2022-2033”. Its goal is to strengthen and invest in public transport as well as in cycling and walking, particularly in urban areas where environmental and capacity challenges are prominent. The plan aims for zero growth in car traffic in the major urban areas.

<b>Name</b>	<b>National Transport Plan 2022-2033<sup>42</sup></b>
<b>Year(s)</b>	2022-2033
<b>Level of adoption</b>	Ministry of Transport
<b>No. of strategy iterations</b>	Second (Previous: “National Transport Plan 2014-2023”)
<b>Cycling share</b>	-
<b>New Mobility Patterns Study</b>	-
<b>Measurable objectives</b>	<b>Cycling share:</b> 8% nationwide, 20% in urban areas <b>Road safety:</b> number of fatalities and serious injuries in road traffic reduced to a maximum of 350 by 2030, of which maximum 50 shall be fatalities, zero fatalities in road traffic in 2050
<b>Road safety</b>	Focus on measures targeting infrastructure, measures for pedestrians and cyclists in urban areas, targeted efforts in relation to high risk factors and vulnerable road users, measures to reduce accidents involving heavy goods vehicles, and support technological developments that promote safety

## 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.

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<sup>42</sup> English summary available at: <https://www.regjeringen.no/en/dokumenter/national-transport-plan-2022-2033/id2863430/?ch=1>

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% has applied to the sales of bicycles. Portugal was the first EU country to apply the reduced rate following the revision of the VAT Council Directive 2006/112/EC in 2021.

<b>Name</b>	<b>Estratégia Nacional para a Mobilidade Ativa Ciclável 2020-2030 / National Strategy for Active Cycling Mobility 2020-2030<sup>43</sup></b>
<b>Year(s)</b>	2020-2030
<b>Level of adoption</b>	Approved by the Government
<b>No. of strategy iterations</b>	First
<b>Cycling share</b>	1% (2014)
<b>New Mobility Patterns Study</b>	2%
<b>Measurable objectives</b>	<p><b>2025 goals:</b></p> <ul style="list-style-type: none"> <li>- Modal share of bicycle trips in cities of 4%</li> <li>- A total extension of 5,000 km in cycle paths</li> <li>- Reduction of road accidents for cyclists by 25%</li> </ul> <p><b>2030 goals:</b></p> <ul style="list-style-type: none"> <li>- Modal share of bicycle trips in cities of 10%</li> <li>- A total extension of 10,000 km in cycle paths</li> <li>- Reduction of road accidents for cyclists by 50%</li> </ul>
<b>National cycle network</b>	Development of a national cycle network of more than 6,000 km by 2023
<b>Promoting intermodality</b>	<ul style="list-style-type: none"> <li>- Review the possibility of transporting bicycles outside heavy passenger transport vehicles</li> <li>- 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</li> </ul>
<b>Fiscal and financial incentives</b>	<ul style="list-style-type: none"> <li>- Implement measures to support the acquisition of bicycles, in particular e-bikes</li> <li>- Increase benefits for public and private entities as regards upgrading workplaces for bicycle users</li> <li>- Possible adaptations will be improved to make workplaces comfortable for those who prefer to use a bicycle.</li> </ul>
<b>Changes to traffic laws/highway code</b>	<ul style="list-style-type: none"> <li>- Improve the Highway Code by taking into account innovative solutions that favour cycling</li> </ul>

<sup>43</sup> Portuguese version available at: <https://dre.pt/web/guest/home/-/dre/123666113/details/maximized?fbclid=IwAR33HEXkCHVsg-nzd1rlzcpF0ZD71y5R56nea6uimCwa0TfoHiMmATkMBco>

- 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 minimum requirements for bicycles and determine upper limits for car parking

**Industrial strategy** Further boost this important sector of the Portuguese economy by increasing domestic demand and by promoting the sharing of specialised knowledge.

**Cycle logistics**

- Investment in bicycle fleets for professional purposes will be encouraged and supported, as will the addition of bicycles to cars as a service vehicle
- Promote the implementation of standards for promoting cargo bicycles in logistics systems

**Cycle tourism** Foster cycle tourism as a more sustainable alternative

## Slovakia

Slovakia had one cycling strategy in the past, the “National Strategy of the Development of Cycling Transport and Cycle Touring in the Slovak Republic”, which was valid from 2014. However, this strategy is outdated and in need of updating. Slovakia was a partner of Danube Cycle Plans and is in the process of updating the national cycling strategy. However, in order to accurately reflect the current state of cycling strategies and ambitions in each country, the outdated Slovak cycling strategy has been removed from this report. Further information on the expired strategy can still be found in our previous reports.

## 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.

<b>Name</b>	<b>Estrategia estatal por la bicicleta / National Strategy for Cycling<sup>44</sup></b>
<b>Year(s)</b>	2020-2025
<b>Level of adoption</b>	Approved by the Government
<b>No. of strategy iterations</b>	First
<b>Cycling share</b>	-
<b>New Mobility Patterns Study</b>	3%
<b>Measurable objectives</b>	Modal shift for 2030 of 35% of the passenger-km that today are carried out in private combustion vehicles towards other non-emitting sources. Of this modal shift, it is expected that 20% will be directed to non-motorised mobility actions, bicycles, or other measures such as teleworking.
<b>National cycle network</b>	Planning of a large multilevel cycle routes network, which will need to be continuous and connected to urban centres
<b>Promoting intermodality</b>	Work hand-in-hand with the Spanish Railways Foundation to improve bicycle-rail intermodality, thus creating safer access to stations and bicycle parking lots
<b>Road safety</b>	Implement traffic calming measures in cities
<b>Fiscal and financial incentives</b>	Study of the feasibility of modifying tax regulations to include bicycle mobility to travel to work in relation to in-kind income.
<b>Capacity-building</b>	Improve training of professionals, which would make it possible to have an effective network of specialists across different areas of cycle tourism.
<b>Changes to traffic laws/highway code</b>	<ul style="list-style-type: none"> <li>- Integrate and standardise planning laws for cycling infrastructure on motorised roads, with the aim of making cyclists safer and more visible</li> <li>- Propose mandatory parking regulations for bikes</li> <li>- 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</li> <li>- The same goes for cycling infrastructure and the normative regulating the circulation of bicycle in natural areas</li> </ul>
<b>Industrial strategy</b>	<ul style="list-style-type: none"> <li>- Create a business and innovation cluster</li> </ul>

<sup>44</sup> Spanish version available at: <https://esmovilidad.mitma.es/estrategia-estatal-por-la-bicicleta>

- Strengthen research and development in the bicycle sector in Spain by bringing together government, businesses and academics
- Development of a seal of excellence and awards to honour excellent and innovative businesses

#### **Bicycle theft**

Extend the bicycle registry to combat the resale of stolen bicycles

#### **Cycle logistics**

- Support to local administrations in the definition of standards and the implementation of cyclogistics in the urban distribution of goods.
- Creation of a data portal that collects information on the sector in the reference European countries, the existing companies in Spain, the types of tricycles and includes success stories.
- Development of a guide for the inclusion in the Sustainable Urban Mobility Plans (SUMP) of standards for the facilitation of cyclogistics (zones, platforms, standards).
- Definition of the technical requirements for the approval of high capacity bicycles for the transport of goods.
- Organisation of specialised conferences and annual “Excellent Cycle Logistics” awards, in recognition of operators with the highest level of excellence and with the most innovative practices.

#### **Cycle tourism**

- Expand the cycle network, also as regards EuroVelo
- Create a Spanish cycletourism label for companies
- Create a network of cycletourism specialists

## **Sweden**

Sweden adopted three cycling strategies in the past: The “National strategy for increased and safer cycling” in 2000, the “Safer cycling - a common strategy for the period 2014-2020 – Version 1.0” strategy and “Cykel Strategi – A national cycling strategy for more and safer cycling” in 2017. Regrettably, following a change in government the document has been removed from official government websites and there seem to be no ambitions to update the strategy.

The outdated Swedish cycling strategy has therefore been removed from the report in order to accurately reflect the current state of cycling strategies and ambitions in each country. Further information on the last strategy can still be found in our previous reports.



# Switzerland

Following a referendum<sup>45</sup> in 2018 to insert a provision on cycling into the Swiss constitution, several measures in favour of the promotion of cycling have been taken at the national level. The most notable one is the Federal Act on Cycle Routes from May 2021 which entered into force in 2023. It obliges cantons and municipalities to proceed with the planning and implementation of cycle path networks. The Federal Council proposes a planning period of five years and an implementation period of 20 years.<sup>46</sup>

The federal level has issued implementation guidelines (infrastructure quality standards) that have the character of standards. Two new ones on "cycle path network planning" and "cycle lanes" will be published soon. Central government funding for non-motorised transport projects in the agglomerations has been provided via the agglomeration programmes for almost 20 years.

<b>Name</b>	<b>Veloweggesetz/ Loi fédérale sur les voies cyclables/Federal Act on Cycle Routes<sup>47</sup></b>
<b>Year(s)</b>	2021
<b>Level of adoption</b>	Approved by the Parliament
<b>No. of strategy iterations</b>	First
<b>Cycling share</b>	5%
<b>New Mobility Patterns Study</b>	-
<b>Infrastructure</b>	Federal Act on Cycle Routes with planning principles, planning obligations and specific implementation deadlines came into force at the beginning of 2023. To assist in the implementation process by cantons and municipalities, implementation guidelines (infrastructure quality standards) have been issued that have the character of standards. Two new ones on "cycle path network planning" and "cycle lanes" will be published soon. The federal level provides funding through agglomeration programmes.

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<sup>45</sup> [https://www.swissinfo.ch/eng/september-23-ballot\\_swiss-to-vote-on-the-importance-of-cycling/44409042](https://www.swissinfo.ch/eng/september-23-ballot_swiss-to-vote-on-the-importance-of-cycling/44409042)

<sup>46</sup> 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>

<sup>47</sup> <https://www.fedlex.admin.ch/eli/oc/2022/790/de>

# 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.

## England

<b>Name</b>	<b>Gear Change: A bold vision for cycling and walking<sup>48</sup> as well as the second cycling and walking investment strategy (CWIS2)</b>
<b>Year(s)</b>	2020-2025; 2022-2025
<b>Level of adoption</b>	The “Gear Change” vision was published by the Department of Transport and with a foreword of the former Prime Minister
<b>No. of strategy iterations</b>	Fourth (previous: “National Cycling Strategy”, 1996 (Applying for England, Scotland and Wales); “Cycling and walking investment strategy (CWIS 1) 2016-2021”)
<b>Cycling share</b>	2% (2018)
<b>New Mobility Patterns Study</b>	-
<b>Measurable objectives</b>	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
<b>National cycle network</b>	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
<b>Promoting intermodality</b>	<ul style="list-style-type: none"> <li>- 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</li> <li>- Reverse the negative trend of reduced bicycle carriage on trains and buses</li> </ul>
<b>Road safety</b>	<ul style="list-style-type: none"> <li>- Updates to the Highway Code that prioritise the safety of cyclists and pedestrians</li> <li>- Mandate higher safety standards on lorries</li> </ul>

<sup>48</sup> 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](https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/904146/gear-change-a-bold-vision-for-cycling-and-walking.pdf)

<b>Fiscal and financial incentives</b>	Establish a national electrically-assisted bike support programme
<b>Capacity-building</b>	Capacity building training for local authorities
<b>Changes to traffic laws/highway code</b>	<ul style="list-style-type: none"> <li>- 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</li> <li>- Greater clarity on pedestrian and cyclist priority at junctions and introducing safe passing speeds and distances</li> <li>- 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</li> <li>- Introduce the offence of causing serious injury by careless or inconsiderate driving</li> <li>- Increase the maximum sentence for causing death by dangerous or careless driving when under the influence of alcohol and drugs</li> </ul>
<b>Bicycle theft</b>	Increase efforts to combat bicycle theft by consolidating bicycle registers and encouraging the registry of bikes
<b>Cycle logistics</b>	Promote cycling for the carriage of freight, and work to reduce unnecessary motorised freight and servicing traffic

## 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.

<b>Name</b>	<b>An Active Travel Action Plan for Wales<sup>49</sup></b>
<b>Year(s)</b>	2017
<b>Level of adoption</b>	Government
<b>No. of strategy iterations</b>	Third (previous: “National Cycling Strategy” 1996 (Applying for England, Scotland and Wales)’; “Active Travel Action Plan 2009-2013”)
<b>Cycling share</b>	-
<b>New Mobility Patterns Study</b>	-
<b>Measurable objectives</b>	Increase from the current 6% to 10% of people that would cycle at least once a week by 2026
<b>Promoting intermodality</b>	Enhance provision for walkers and cyclists when investing in public transport infrastructure

<sup>49</sup> English version available at: <https://gov.wales/sites/default/files/publications/2017-09/active-travel-action-plan.pdf>

**Road safety** Consider how new transport powers can best improve road safety in Wales, in particular for pedestrians and cyclists

**Capacity-building**

- Offer training on the use of the Design Guidance and enable interactive learning on other aspects of active travel as required.
- Develop mechanisms to enable practitioners to share experience and provide feedback.
- Seek out opportunities to raise awareness of the Act and its aims and requirements among transport, health and education professionals, and local councillors.

**Changes to traffic laws/highway code**

- 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.

## Scotland

<b>Name</b>	<b>Cycling Framework for Active Travel - A plan for everyday cycling<sup>50</sup></b>
<b>Year(s)</b>	2022-2030
<b>Level of adoption</b>	Government
<b>No. of strategy iterations</b>	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).
<b>Cycling share</b>	4% (to work)
<b>New Mobility Patterns Study</b>	-
<b>Measurable objectives</b>	Invest 10% of the transport budget on active travel from 2024/2025
<b>National cycle network</b>	<ul style="list-style-type: none"> <li>- Implement dedicated, high-quality cycling infrastructure suitable for all</li> <li>- Embed cycling in the design and maintenance of our places and communities and prioritise user comfort and safety</li> </ul>
<b>Promoting intermodality</b>	- Increase equity of access to cycles and cycling opportunities

<sup>50</sup> English version available at: <https://www.transport.gov.scot/publication/cycling-framework-for-active-travel-a-plan-for-everyday-cycling/>

- Ensure modal integration across the transport network including adapted and non-standard cycles, e-cycles, cargo cycles and cycle-share

<b>Road safety</b>	Support the deliverables set out in Scotland’s Road Safety Framework 2030 under its Active and Sustainable Travel Strategic Actions, ensuring that road safety remains a key focus of active and sustainable travel in Scotland
<b>Capacity-building</b>	Provide local authorities with resources, including guidance and best practice examples, to enable effective local community engagement
<b>Industrial strategy</b>	Work with manufacturers, social enterprises and industry vocational partners to increase cycle and cycle parts production and recycling in Scotland with a focus on green skills and materials research and development
<b>Cycle logistics</b>	Engage the business sector to embed active travel in wider corporate culture including through the use of cargo cycles as the normal choice for local deliveries

## Northern Ireland

<b>Name</b>	<b>A Bicycle Strategy for Northern Ireland<sup>51</sup></b>
<b>Year(s)</b>	2015-2040
<b>Level of adoption</b>	Published by the Minister for Regional Development (DRD)
<b>No. of strategy iterations</b>	First
<b>Cycling share</b>	-
<b>New Mobility Patterns Study</b>	-
<b>Measurable objectives</b>	By 2025: <ul style="list-style-type: none"> <li>- 20% of all journeys under one mile to be cycled (40% in 2040)</li> <li>- 10% of all journeys between one and two miles to be cycled (20% in 2040)</li> <li>- 5% of all journeys between two and five miles to be cycled (10% in 2040)</li> </ul>
<b>National cycle network</b>	Review existing National Cycle Network routes the goal of their further development via the introduction of more physical infrastructure in addition to existing signage
<b>Promoting intermodality</b>	Fully integrate the bicycle into the wider transport infrastructure, linking it with other modes of transport. Integrate cycling routes and

<sup>51</sup> English version available at: <https://www.infrastructure-ni.gov.uk/sites/default/files/publications/drd/a-bicycle-strategy-for-northern-ireland.pdf>

infrastructure into transport hubs, bus and rail stations, as well as major bus stops and Park & Ride sites. Improve bicycle parking and carriage.

**Road safety**

- Traffic calming measures
- Design infrastructure with cyclist safety in mind
- Media campaigns delivering tailored safety messages to all road users

**Changes to traffic laws/highway code**

- 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'

**Cycle tourism**

Create a more cohesive network to make Northern Ireland a more popular cycle tourism destination

# ANNEX I: Central government investments

Country	(A) Population	Central government funds (in Euro)					EU structural funds (in Euro) <sup>52</sup>		(H) NRRF (in Euro) <sup>53</sup>	(I) Ø 2023 (F, G, H)	(J) Total per year 2023 (in Euro) (E+I)	Per capita 2023 (in Euro) (J/A)
		(B) 2022	(C) 2023	(D) 2024	(E) Ø 2023 (B, C, D)	Comment	(F) 2014- 2020	(G) 2021- 2027				
Austria	8.900.000	<b>40.000.000</b>	<b>67.000.000</b>	<b>95.000.000</b>	67.333.333	W, C, MM	3.857.221	0	0	275.516	67.608.849	7.6
Belgium	11.500.000		<b>15.135.000</b>	15.135.000	15.135.000		4.655.526	27.159.037	410.700.000	70.722.469	85.857.469	7.5
Belgium - Flanders	6.650.000		<b>318.803.554</b>	319.498.641	318.803.554					0	318.803.554	47.9
Bulgaria	6.800.000					Unknown	88.817.715	34.405.900	1.000.000*	8.968.353	8.968.353	1.3

<sup>52</sup> Figures based on EU Commission Cohesion Open Data Platform, See ECF publication : <https://ecf.com/users/fabian-kuester/trusted-content/analysis-cycling-investments-eu-member-states-using-eu-structural-funds>. For calculating the 2023 average, we used the sum of “decided” investments for the 2014-2020 EU financial period plus the “planned” investments for the 2021-2027 EU financial period, divided by 14.

<sup>53</sup> 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>

Croatia	4.100.000		<b>18.000.000</b>	18.000.000	18.000.000	2023-2027: €166m, incl. EU funds	0	70.100.000	6.000.000*	6.007.143	24.007.143	5.9
Cyprus	900.000	1.333.000	<b>1.333.000</b>		1.333.000	2021-2023: €4m	4.863.476	9.500.000	13.695.000*	3.308.463	4.641.463	5.2
Czechia	10.500.000	<b>22.900.000</b>			22.900.000		107.200.000	408.646.409	24.850.000*	40.987.839	63.887.839	6.1
Denmark	5.800.000	<b>43.000.000</b>	<b>20.000.000</b>	<b>27.000.000</b>	30.000.000		0	0	70.000.000	11.666.667	41.666.667	7.2
Estonia	1.300.000					Unknown	0	62.000.000	5.000.000	5.261.905	5.261.905	4.0
Finland	5.500.000	<b>21.350.000</b>	<b>17.850.000</b>	<b>17.350.000</b>	18.850.000		3.500.000	6.563.210	0	718.801	19.568.801	3.6
France	67.700.000		<b>400.000.000</b>	<b>400.000.000</b>	400.000.000		56.761.234	165.859.379	0	15.901.472	415.901.472	6.1
Germany	83.100.000	758.000.000	<b>560.000.000</b>		560.000.000		54.848.734	85.879.042	0	10.051.984	570.051.984	6.9
Greece	10.600.000					Unknown	5.069.995	86.087.112	25.000.000*	10.677.889	10.677.889	1.0
Hungary	9.700.000		<b>43.750.000</b>	43.750.000	43.750.000	2023-2030: HUF 248bn, incl. EU funds	207.646.217	299.762.195	0	36.243.458	79.993.458	8.2
Ireland	5.000.000	<b>353.000.000</b>	<b>360.000.000</b>	<b>360.000.000</b>	357.666.667	W, C	3.500.000	0	0	250.000	357.916.667	7.6
Israel	9.038.000	<b>99.100.000</b>	<b>99.100.000</b>	<b>99.100.000</b>	99.100.000	2021-2031: ILS 400m/y	n/a	n/a	n/a	n/a	99.100.000	11.0
Italy	59.100.000	<b>185.000.000</b>	<b>185.000.000</b>	<b>185.000.000</b>	185.000.000	2022-2024: €554m	33.718.727	376.110.667	200.000.000*	62.606.861	247.606.861	4.2
Latvia	1.800.000					Unknown	0	22.492.390	34.000.000*	7.273.266	7.273.266	4.0
Lithuania	2.830.000					Unknown	8.500.000	130.726.000	0	9.944.714	9.944.714	3.5



Luxembourg	600.000	<b>29.500.000</b>	<b>31.000.000</b>	<b>18.900.000</b>	26.466.667	W, C	0	0	0	0	26.466.667	44.1	
Malta	500.000	<b>5.000.000</b>	<b>5.000.000</b>	<b>5.000.000</b>	5.000.000		0	8.925.000	2.220.000*	1.007.500	6.007.500	12.0	
Netherlands	17.500.000	<b>232.000.000*</b>	<b>232.000.000*</b>	<b>232.000.000*</b>	232.000.000		0	0	0	0	232.000.000	13.3	
Norway	5.400.000	<b>100.000.000*</b>	<b>100.000.000*</b>	<b>100.000.000*</b>	100.000.000		n/a	n/a	n/a	n/a	100.000.000	18.5	
Poland	37.700.000					Unknown	379.252.981	777.574.418	14.000.000	84.963.862	84.963.862	2.3	
Portugal	10.300.000					Unknown	232.522.467	97.450.000		23.569.462	23.569.462	2.3	
Romania	19.100.000					Unknown	127.074.664	140.574.469	247.500.000	60.367.795	60.367.795	3.2	
Slovakia	5.400.000	<b>22.680</b>	<b>772.600</b>	<b>22.680</b>	272.653		47.299.966	100.000.000	85.000.000	24.688.093	24.960.746	4.6	
Slovenia	2.100.000	<b>47.300.000</b>	<b>29.600.000</b>	<b>41.100.000</b>	39.333.333		52.692.220	74.550.000		9.088.730	48.422.063	23.1	
Spain	47.400.000	7.250.000	<b>5.285.000</b>		5.285.000		83.332.950	69.276.837	500.000.000	94.234.032	99.519.032	2.1	
Sweden	10.000.000					Unknown	0	0	25.000.000*	4.166.667	4.166.667	0.4	
Switzerland	8.400.000	<b>67.700.000</b>	<b>47.300.000</b>	<b>77.600.000</b>	64.200.000	W, C	n/a	n/a	n/a	0	64.200.000	7.6	
UK - England (outside London)	47.700.000	<b>958.500.000*</b>	<b>958.500.000*</b>	<b>958.500.000*</b>	958.500.000	2021-2025: £3.290bn, thereof £804m ring-fenced (W and C)				n/a	0	958.500.000	20.1
UK - Scotland	5.500.000		<b>220.000.000</b>		220.000.000	W, C			n/a	0	220.000.000	40.0	
UK - Wales	3.100.000		<b>67.670.000</b>		67.670.000	W, C			n/a	0	67.670.000	21.8	

\* Estimate; W: Walking; C: Cycling; PT: Public Transport; MM: Mobility Management

# ANNEX II: National cycling strategies: Table overview

Country	Status	Iteration	Start year	End year	Duration	Infrastructure	National Cycle Network	Intermodality	Road Safety	Education, awareness-	Fiscal & financial incentives	Capacity building	Traffic law/highway codes	Industrial strategy	Bike theft	Cycle logistics	Cycle tourism
AL	None																
AD	None																
AM	None																
AT	Specific NCP in place	3	2015	2025	11	✓	✗	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
AZ	None																
BY	Specific NCP in place	1	2018			✓	✗	✗	✓	✓	✗	✗	✓	✗	✗	✗	✓
BE	Specific NCP in place	1	2021	2024	4	✓	✗	✓	✓	✓	✓	✓	✓	✗	✓	✓	✗
BA	None																
BG	Under development																
HR	Specific NCP in place	1	2023	2027	5	✓	✗	✗	✓	✓	✗	✗	✓	✗	✗	✓	✓
CY	Similar document	1	2021	2023	3	✓	✗	✓	✓	✗	✓	✓	✓	✗	✗	✗	✗
CZ	Specific NCP in place	3	2021	2030	10	✓	✓	✓	✓	✓	✗	✓	✓	✗	✗	✓	✗
DK	Outdated																
EE	None																
FI	Specific NCP in place	1	2018	2023	6	✓	✓	✓	✓	✓	✓	✓	✓	✓	✗	✗	✓
FR	Specific NCP in place	3	2022	2027	6	✓	✗	✓	✓	✓	✓	✓	✓	✓	✗	✗	✓
GE	None																
DE	Specific NCP in place	3	2021	2030	10	✓	✗	✓	✓	✓	✓	✓	✓	✓	✗	✓	✓
EL	Under development																
HU	Specific NCP in place	2	2023	2030	8	✓	✓	✓	✓	✓	✓	✓	✓	✓	✗	✓	✓

Country	Status	Iteration	Start year	End year	Duration	Infrastructure	National Cycle Network	Intermodality	Road Safety	Education, awareness-	Fiscal & financial incentives	Capacity building	Traffic law/highway codes	Industrial strategy	Bike theft	Cycle logistics	Cycle tourism
IS	Specific NCP in place	1	2021	2041	20	✓	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗
IE	Similar document	2	2022	2025	4	✓	✓	✓	✓	✓	✓	✓	✓	✗	✗	✗	✗
IL	None																
IT	Specific NCP in place	1	2022	2024	3	✓	✓	✓	no	✓	✓	✓	✓	✓	✗	✓	✓
KZ	None																
KG	None																
LV	Outdated	1	2018	2020	3												
LI	Similar document	1	2020	2030	11	✓	✓	✓	✓	✗	✓	✗	✗	✗	✗	✗	✓
LT	None																
LU	Similar document	4	2022	2035	14	✓	✓	✓	✓	✗	✓	✓	✓	✗	✗	✗	✓
MT	Under development																
MD	None																
MC	None																
ME	None																
NL	Similar document	2	2022	2025	4	✓	✗	✓	✓	✓	✓	✓	✗	✗	✗	✗	✗
NO	Similar document	2	2022	2033	12	✓	✗	✗	✓	✗	✗	✗	✗	✗	✗	✗	✗
PL	None																
PT	Specific NCP in place	1	2020	2030	11	✓	✓	✓	✗	✓	✓	✓	✓	✓	✗	✓	✓
MK	None																
RO	Under development																
RU	None																
SM	None																
RS	Under development																
SK	Outdated	1	2014	2016	3												
SI	Under development																
ES	Specific NCP in place	1	2020	2025	6	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
SE	Outdated	3	2017														
CH	Similar document	1	2023			✓	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗
TJ	None																
TR	None																

Country	Status	Iteration	Start year	End year	Duration	Infrastructure	National Cycle Network	Intermodality	Road Safety	Education, awareness-	Fiscal & financial incentives	Capacity building	Traffic law/highway codes	Industrial strategy	Bike theft	Cycle logistics	Cycle tourism
TM	None																
UK-ENG	Specific NCP in place	4	2020	2025	6	✓	✓	✓	✓	✓	✓	✓	✓	✗	✓	✓	✗
UK-NIR	Specific NCP in place	1	2015	2040	26	✓	✓	✓	✓	✓	✗	✗	✗	✗	✗	✗	✓
UK-SCT	Specific NCP in place	5	2022	2030	9	✓	✗	✓	✓	✓	✗	✓	✗	✓	✗	✓	✗
UK-CYM	Specific NCP in place	2	2017			✓	✗	✓	✓	✓	✗	✓	✓	✗	✗	✗	✗
UA	Under development																
UZ	None																
VA	None																

# ANNEX III: Mode shares in the EU-27<sup>54</sup>

Country	Cycling share	Active mobility share	Car share
EU-27	8%	35%	54%
Austria	7%	31%	57%
Belgium	10%	27%	61%
Bulgaria	4%	40%	39%
Croatia	7%	23%	61%
Cyprus	1%	9%	89%
Czechia	5%	39%	44%
Denmark	15%	41%	45%
Estonia	6%	22%	60%
Finland	10%	34%	55%
France	5%	27%	63%
Germany	11%	37%	53%
Greece	4%	37%	52%
Hungary	16%	36%	45%
Ireland	4%	27%	66%
Italy	6%	33%	58%
Latvia	7%	21%	65%
Lithuania	3%	35%	52%
Luxembourg	3%	17%	73%

<sup>54</sup> Calculations based on data from the European Commission, Study on New Mobility Patterns in European Cities (2022), available at: [https://transport.ec.europa.eu/transport-themes/sustainable-transport/sustainable-transport-studies\\_en](https://transport.ec.europa.eu/transport-themes/sustainable-transport/sustainable-transport-studies_en)

<b>Malta</b>	1%	21%	66%
<b>Netherlands</b>	28%	44%	45%
<b>Poland</b>	9%	31%	58%
<b>Portugal</b>	2%	25%	65%
<b>Romania</b>	6%	49%	38%
<b>Slovakia</b>	8%	41%	46%
<b>Slovenia</b>	8%	30%	61%
<b>Spain</b>	3%	43%	46%
<b>Sweden</b>	11%	30%	54%

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## National Cycling Strategies

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<b>Belarus</b>	<a href="https://rovar.info/velokonczepczyia/">https://rovar.info/velokonczepczyia/</a>
<b>Belgium</b>	<a href="https://gilkinet.belgium.be/fr/le-gouvernement-fédéral-lance-be-cyclist-le-1er-plan-daction-fédéral-pour-la-promotion-du-vélo">https://gilkinet.belgium.be/fr/le-gouvernement-fédéral-lance-be-cyclist-le-1er-plan-daction-fédéral-pour-la-promotion-du-vélo</a>
<b>Croatia</b>	<a href="https://mmpi.gov.hr/infrastruktura/biciklisticka-infrastruktura/nacionalni-plan-razvoja-biciklistickog-prometa-za-razdoblje-od-2023-do-2027-godine/24099">https://mmpi.gov.hr/infrastruktura/biciklisticka-infrastruktura/nacionalni-plan-razvoja-biciklistickog-prometa-za-razdoblje-od-2023-do-2027-godine/24099</a>
<b>Cyprus</b>	<a href="https://www.yianniskarousos.com/%cf%83%cf%87%ce%ad%ce%b4%ce%b9%ce%bf-%ce%b4%cf%81%ce%ac%cf%83%ce%b7%cf%82-%cf%84%ce%b7%cf%82-%cf%80%cf%81%ce%bf%cf%8e%ce%b8%ce%b7%cf%83%ce%b7%cf%82-%cf%87%cf%81%ce%ae%cf%83%ce%b7%cf%82-%cf%84%ce%bf/">https://www.yianniskarousos.com/%cf%83%cf%87%ce%ad%ce%b4%ce%b9%ce%bf-%ce%b4%cf%81%ce%ac%cf%83%ce%b7%cf%82-%cf%84%ce%b7%cf%82-%cf%80%cf%81%ce%bf%cf%8e%ce%b8%ce%b7%cf%83%ce%b7%cf%82-%cf%87%cf%81%ce%ae%cf%83%ce%b7%cf%82-%cf%84%ce%bf/</a>
<b>Czechia</b>	<a href="https://www.mdcz.cz/getattachment/Dokumenty/Strategie/Dopravni-politika-a-MFDI/Dopravni-politika-CR-pro-obdobi-2014-2020-s-vyhled/Dopravni_Politika_CR_ENG.pdf.aspx">https://www.mdcz.cz/getattachment/Dokumenty/Strategie/Dopravni-politika-a-MFDI/Dopravni-politika-CR-pro-obdobi-2014-2020-s-vyhled/Dopravni_Politika_CR_ENG.pdf.aspx</a>
<b>Finland</b>	<a href="https://www.traficom.fi/sites/default/files/media/file/K%C3%A4velyn%20ja%20py%C3%B6r%C3%A4ilyn%20edist%C3%A4misohjelma.pdf">https://www.traficom.fi/sites/default/files/media/file/K%C3%A4velyn%20ja%20py%C3%B6r%C3%A4ilyn%20edist%C3%A4misohjelma.pdf</a> <a href="https://bicycleinfrastructuremanuals.com/wp-content/uploads/2019/02/National-">https://bicycleinfrastructuremanuals.com/wp-content/uploads/2019/02/National-</a>

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France	<a href="https://www.ecologie.gouv.fr/sites/default/files/23100_DP-Plan-velo-2023.pdf">https://www.ecologie.gouv.fr/sites/default/files/23100_DP-Plan-velo-2023.pdf</a> <a href="https://www.vie-publique.fr/sites/default/files/rapport/pdf/283777.pdf">https://www.vie-publique.fr/sites/default/files/rapport/pdf/283777.pdf</a>
Germany	<a href="https://bmdv.bund.de/SharedDocs/DE/Anlage/StV/nationaler-radverkehrsplan-3-0-en.pdf?__blob=publicationFile">https://bmdv.bund.de/SharedDocs/DE/Anlage/StV/nationaler-radverkehrsplan-3-0-en.pdf?__blob=publicationFile</a>
Ireland	<a href="https://www.gov.ie/en/publication/848df-national-sustainable-mobility-policy/">https://www.gov.ie/en/publication/848df-national-sustainable-mobility-policy/</a>
Israel	<a href="https://www.gov.il/BlobFolder/policy/infrastructures-19-12/he/infrastructures.pdf">https://www.gov.il/BlobFolder/policy/infrastructures-19-12/he/infrastructures.pdf</a>
Italy	<a href="https://www.mit.gov.it/nfsmittgov/files/media/notizia/2022-08/PG%20Mobilit%C3%A0%20Ciclista%20e%20allegati.pdf">https://www.mit.gov.it/nfsmittgov/files/media/notizia/2022-08/PG%20Mobilit%C3%A0%20Ciclista%20e%20allegati.pdf</a>
Liechtenstein	<a href="https://www.mobilitaet2030.li/application/files/8915/8826/4959/Mobilitatskonzept_2030.pdf">https://www.mobilitaet2030.li/application/files/8915/8826/4959/Mobilitatskonzept_2030.pdf</a>
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Netherlands	<a href="https://www.government.nl/topics/bicycles/tour-de-force">https://www.government.nl/topics/bicycles/tour-de-force</a>
Norway	<a href="https://www.regjeringen.no/contentassets/e6e7684b5d54473dadeeb7c599ff68b8/en-gb/pdfs/stm201220130026000engpdfs.pdf">https://www.regjeringen.no/contentassets/e6e7684b5d54473dadeeb7c599ff68b8/en-gb/pdfs/stm201220130026000engpdfs.pdf</a>
Portugal	<a href="https://dre.pt/web/quest/home/-/dre/123666113/details/maximized?fbclid=IwAR33HEXkCHVsq-nzd1r1zcpF0ZD7ly5R56nea6uimCwa0TfoHiMmATkMBco">https://dre.pt/web/quest/home/-/dre/123666113/details/maximized?fbclid=IwAR33HEXkCHVsq-nzd1r1zcpF0ZD7ly5R56nea6uimCwa0TfoHiMmATkMBco</a>
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