* Annual Report 2018





A year of change and preparation for the next decade

Looking ahead to the next decade our general assembly adopted now the 'ECF Vision 2030', putting the contribution of cycling to the achievement of the Sustainable Development Goals in Europe at the center of our work. Our new mission statement: We work on better and more cycling for sustainable mobility in Europe for all. We realise that the change we want to see will not happen without good partnership of civil society organisations and the private sector.

The partnership with cycling organisations and allies from other continents led to our initiative in 2014 to create the network World Cycling Alliance. We are proud that the WCA turned into an independent legal entity now. Our collaboration with the cycling industry led in 2011 to the creation of the ECF Cycling Industry Club. Leading members of that club founded now the new association 'Cycling Industries Europe'. And we continued in 2018 our partnership with the European Commission and many partners in over 10 EU co-funded projects. We are grateful to our member organisations, the European Commission, the members of the Cycling Industry Club, the Velo-city host cities, the members of the 'Cities and Regions for Cyclists' and the EuroVelo coordination centers for their collaboration and financial support.

The year 2019 will be another year of changes. We will work in a new frame for our collaboration with the cycling industry, we will continue our partnership with a new European Commission, and we will take advantage of a new leadership as Bernhard Ensink is leaving ECF in 2019 after having served as ECF Secretary General for more than 12 years.



Christophe Najdovski President

Board members in 2018: Christophe Najdovski (President from 19 May), Lars Strömgren (Vice-President; Acting President 1 January – 19 May), Jens Peter Hansen (Treasurer), Raluca Fiser (Vice-President), William Nederpelt (Vice-President), Ksenia Semenova (Vice-President till 19 May), Damien Ó Tuama (Vice-President), Isabel Porras Novalbos (Vice-President), Alessandro Tursi (Vice-President from 19 May).

Annual General Meeting elects New President and adopts 'ECF Vision 2030'

72 * Participants

37 * Members Represented



* Countries Represented

Guided by the ECF Nomination Committee the representatives of ECF's full members elected Christophe Najdovski, Paris' Deputy Mayor of transportation and public space, as the new ECF President. The ECF community said farewell to Vice-President Ksenia Semenova (replaced by Alessandro Tursi) and former President Manfred Neun, who resigned at the end of 2017. According to the adopted review of the statutes the terms of board members is now three years with a maximum of two consecutive terms, unless otherwise decided by the General Meeting.

As a follow up to the ECF Vision 2020 the AGM adopted the ECF Vision 2030. This document will be the basis for a review of ECF's future strategies. According this short vision document ECF envisions a radical change of unsustainable mobility into sustainable mobility, a sustainable Europe, where walking and cycling (active mobility) are the basic mobility system in mobility policies. ECF wants that organizations and institutions from the civil society, business and public sector work harmoniously together on sustainable mobility for all. Based on the mission "We work on better and more cycling for sustainable mobility in Europe for all" ECF supports the achievement of the Sustainable Development Goals in Europe, focusing on the growth of cycle use in Europe, on the increase of investments in cycling and the improvement of regulations for more and better cycling in Europe.

According to the vision ECF is in 2030 a professional, evidence based, effective and respected international organization, the leading European international cycling advocacy and promotion organization, a positive partner for the EU and international, national, regional and local institutions and for organizations from the civil society, business and public sector, and one of the leading cycling advocacy organizations in the World Cycling Alliance (WCA).



ECF Advocacy scores big points with very positive impact on cycling in Europe

In 2018 ECF scored a series of advocacy successes that will have a very positive impact on cycling. As for our European advocacy, five successes will be highlighted in this report that will make cycling safer (I and II), facilitate bicycle carriage on trains (III) and cluding pedelec mandatory motor insurance (IV). In 2019, we will need to bring those success stories home when the negotiations will be concluded with the Member States. (V).

At the international and global level, ECF celebrated the 1st World Bicycle Day on June 3rd, a remarkable global statement that 'la petite reine' has a bright future ahead! In addition, a series of key policy documents were published in 2018 or are in the final making, most notably the Global Action Plan for Physical Activity and the pan-EU Master Plan for Cycling Promotion.

I Safer motorized vehicles

The revised General Safety Regulation (GSR) will make cars and lorries a lot safer for pedestrians and cyclists. All new cars will be equipped with intervening Intelligent Speed Assistance and Automated Emergency Braking, reducing collisions by 30% and fatal crashes by 20%. The GSR will also address another big safety hazard for people cycling: lorries. All new lorries will have a turning assist and a remodeled cabin design, hereby dramatically improving direct vision for the driver and hence reducing the blind spot. Currently about 25% of all fatal accidents among cyclists are caused by crashes with heavy vehicles, in urban agglomerations this can be as high as 50%.

Among the co-legislators from the EU institutions and Member States, there is strong support for these changes, however some details such as on the concrete lead-in times still need to be ironed out in 2019. We can expect most of these new technologies to enter the market by 2022, the new lorry cabin design will have to wait until the end of the decade.

II Safer and more accessible cycling infrastructure: Road Infrastructure Safety Management Directive means that cyclists explicitly have to taken into account when building new infrastructure

The safety of people cycling is also very much influenced by how Europe's roads are designed, built and maintained. Are they fit for purpose? In the past we have seen big infrastructure projects being built with EU money that ignored the interests of people cycling, such as cutting cycling corridors in half through the construction of motorways. Also the quality of cycling projects was not always state of the art. All this is about to change as the revised Road Infrastructure Safety Management Directive (RISM) will require relevant authorities to take the needs of pedestrians and cyclists explicitly into account when building new infrastructure. This general requirement is to be complemented with quality guidelines for cycling infrastructure projects. ECF will keep lobbying in 2019 on the final details and scope of this Directive.

III Space for bicycle carriage on trains: European Parliament wants space for at least 8 bicycles on new or refurbished trains

Another infrastructure element ECF has been dealing with was in the context of the revised Railway Passenger Rights Regulation. The current regulation leaves railway companies to decide what services are offered to customers with bicycles. Despite some success stories in recent years, it is remains complicated to find information about the availability of cycle carriage or reserved spaces, and there are still many cross-border and long distance trains that have no such services at all, putting a serious barrier to the development of bicycle tourism and to multi-modal solutions in daily mobility. After extensive lobbying of MEPs, ECF successfully convinced the European Parliament to support equipping every new or refurbished train with a designated space for at least 8 bicycles. A final decision is still pending as Member States will be formulating their position during 2019.

IV Excluding Pedelecs from obligatory insurance: European Parliament sides with ECF position not to include Pedelecs-25

The proposed revision of the Motor Insurance Directive (MID) suggested to classify Pedelecs-25 as motor vehicles. This is not in line with other EU or Member States' legislation that have treated Pedelecs-25 essentially in the same way as conventional bicycles. If the Commission proposal were to become law, about 12 million pedelec users in the EU would need to obtain a motor insurance: putting a barrier to further e-bikes development. ECF has been lobbying the European Parliament and Member States to not follow the Commission proposal, with the European Parliament already siding with the ECF position to only include typeapproved vehicles into the scope of the MID. Since pedelecs-25 do not require type-approval, they would be excluded from the MID. In 2019, ECF continues this campaign by lobbying Member States to agree with the European Parliament.

V Structured Dialogue ECF – European Commission on EU Cycling Strategy

The flawed MID proposal is a prime example why the Commission needs to have a more coherent approach in place with regards to cycling policies across its departments. As a concrete result of the ECF 2017 campaign for EU Cycling Strategy, we made an important step forward on governance, by agreeing with the European Commission to set up a Structured Dialogue to coordinate cycling policies across the various departments. That was one of the main purposes of the EU Cycling Strategy campaign. With the setting up a regular Structured Dialogue between ECF and DG MOVE, the Commission's Department for Transport and Mobility, the campaign could book one of its first concrete results. ECF expects a great deal of ambitious Commission proposals over the next few years!

And more

ECF has been working of course on many more issues: we published a detailed report comparing fiscal incentives for commuting to work, with an interactive online tool available on the ECF website. We created a report comparing offstreet bicycle and car parking regulations in 31 European countries (to be published in 2019). ECF was an active partner of the Partnership on Urban Mobility, that was set up by the EU as part of the Urban Agenda. ECF helped its members in making the case for more impactful national cycling strategies related to infringement procedures Member States are undergoing for not complying with EU air quality laws. And we provided information to our members on the National Energy and Climate Plans.

An important milestone coming up in 2019 is the development of a new ECF Advocacy Strategy 2030, setting the agenda for the 2020s.

ECF Partner in many projects

ECF is a partner in the following projects:

PACTE

Promotion of more physical activity in cities throughout Europe. The project develops tools and guidelines for cities to become more active.

ΜΟΤΙΥ

Redefinition of the measurement of "Value of Travel Time" shifting from the usual time=money equation to a more qualitative, behavioral approach that considers subjective information.

CHIPS

Development and promotion of Cycle Highways as an effective and cost efficient low carbon solution for commuting towards and from urban employment poles.

СССВ

Increase and acceleration of cycle logistics, addressing marketing, financial incentives, business development, technical requirements and new business models.

HEMA

Implementation of physical activity and mobility actions for companies.

CFEC

Design and implementation of a European certification framework for Cycle Friendly Employers in 14 European countries.

MORE

Development of design concepts to encourage street activity and reduce traffic dominance by considering the needs of all road users and exploring experimental options such as dynamic allocation of road space.







ECF as global player in promoting cycling for better global policies

Pan-European Master Plan for Cycling Promotion ready for adoption

As part of the WHO and UNECE-led Transport, Health, Environment Pan-European Programme (THE PEP), a partnership has been set up in 2014, with involvement of ECF, to develop a pan-European Master Plan for Cycling. ECF contributed intensively to a detailed guidance document for the 54 Member States on how to improve cycling policies at the national level. An advanced draft was published in December 2018, the final document will be adopted at a Ministerial High-Level conference in 2019.

Global Action Plan for Physical Activity acknowledges importance of cycling for health

This year also saw the launch of the WHO Global Action Plan on Physical Activity (GAPPA) 2018-2030, **'More active people for a healthier world'**, on which ECF played a critical role in underlining the cycling agenda.

ECF represents cycling at OECD's International Transport Forum and in the World Bank's initiative 'Sustainable Mobility for All'

Getting cycling at the forefront at the annual ITF conference of Transport Ministers, ECF was again one of the stakeholders participating in Leipzig and contributing with ideas for the programme. ECF is a member of the **Sum4All Consortium**, a World Bank Initiative on Sustainable Mobility. SuM4All is a multistakeholder partnership that speaks with one voice and acts collectively to help transform the transport sector.

Cycling in the UN New Urban Agenda

ECF continued its valuable collaboration with **UN-HABITAT** and had a prominent role in the 9th edition of the **World Urban Forum**, held in February 2018 in Kuala Lumpur, Malaysia. ECF was on the panel of the Special Session on Urban Mobility and Safe and Accessible Transport, addressing stakeholders on the importance of cycling for implementing the **New Urban Agenda**.

UN declares 3rd of June World Bicycle Day

June 3rd 2018 marked the very **first UN World Bicycle Day** with cycling communities coming together from all four corners of the globe to celebrate. The United Nation's declaration called on its member states to celebrate and promote cycling on every subsequent June 3rd, and to include it at all levels of government policy. The World Cycling Alliance (WCA) and ECF welcomed this resolution adopted by the UNGA, after having campaigned for a UN designated World Bicycle Day since 2016

Transport and Climate Change 2018 Global Status Report reflects cycling well

ECF contributed an active member of the Partnership of Sustainable Low Carbon Transport (SLoCaT) on the strategy group and as co-author of the chapter on Walking & Cycling in the **Transport and Climate Change 2018 Global Status Report**. The report was presented at COP24 in Katowice, Poland.

5,340,997

* Pageviews

1,748,613

* Number of sessions

Pages viewed per session

2.5 * Minutes. Average session duration

EuroVelo: growing cycling for leisure and tourism in Europe

Record numbers at the EuroVelo and Cycle Tourism Conference and visiting EuroVelo.com

In 2018, EuroVelo.com strengthened its position as the reference website for planning cycling holidays in Europe. Only last year, the EuroVelo web platform registered a record number of views (over 5.3 million, 26.5% more than the previous year) with RhineCycleRoute.eu (EuroVelo 15) being the most visited individual EuroVelo route website.

Last year also saw the launch of a new EuroVelo Instagram profile and the development of the new **EuroVelo Integrated IT solution including a new** database/GIS and web front for EuroVelo.com.

The biggest EuroVelo event of the year was the EuroVelo and Cycle Tourism Conference 2018. With a record number of participants (more than 150), speakers (40) and sessions (8). The edition was our biggest and most successful conference to date, gathering tourism and cycle tourism professionals from 30 different countries in Limburg, Belgium on 26-28 September 2018.

EuroVelo and cycling tourism were also featured prominently at Velo-city 2018. Each of the four days featured a session on EuroVelo and/or cycle tourism including a plenary session.

The network of National EuroVelo Coordination Centres and Coordinators (NECC/Cs) has now 22 members, including the three new members welcomed in 2018.

Two new projects and ongoing route developments

Two new projects kicked off in 2018, focusing on the development of EuroVelo 3 – Pilgrims Route and in the promotion of cycling tourism in natural areas (ECO-CICLE).





EuroVelo 3

Pilgrim's route COSME project: Pilgrims Route kicked off in April. The project aims to strengthen transnational cooperation in the development of EuroVelo 3 – Pilgrims Route. The French part of EuroVelo 3 was launched in June.



ECO-CICLE project

Aims to position the bicycle as the best sustainable transport option to access natural heritage sites. This project will explore the possibility of creating a connection between EuroVelo 1 – Atlantic Coast Route in Algarve and EuroVelo 8 – Mediterranean Route in Cadiz through the natural area of Doñana in Andalusia.

There are three major ongoing route development projects, focusing on implementing pilot actions (investments on infrastructure: signposting, counters, etc.), communication tools (websites, databases, etc.), strengthening the transnational cooperation along the routes and contributing to a more sustainable tourism in Europe:

AtlanticOnBike Project: EuroVelo 1 – Atlantic Coast Route

Medcycletour Project: EuroVelo 8 – Mediterranean Route

Biking South Baltic! Project: EuroVelo 10 – Baltic Sea Cycle Route

Additionally, further route developments took place across the network. For example, in France, over 30 public actors met in April to launch a steering committee for EuroVelo 4 – Central Europe Route that will focus on Normandy (where 85% of the itinerary is developed), Hauts-de-France (where the development level is at 45%) and the overall touristic identity of the route. In Ireland, the North West Greenway Network Project consists of three routes to be completed by 2022. Their development will result in a greenway network of approximately 126.5km in the North West. These routes will complement existing cycleways in the area, among which EuroVelo 1 – Atlantic Coast Route.

ECF Networks

Cities and Regions for Cyclists: A growing ECF **network** for exchanging best practices among local **and** regional cycling authorities.

In 2018, the **Cities and Regions for Cyclists** (CRC) network grew stronger than ever as we welcomed 5 new members committed to positioning cycling at the centre of urban planning and political thinking. Throughout the year, our 35 members exchanged best practices in a variety of events and workshops (co-)organised by ECF.

More than 200 people participated in the final conference of the FLOW H2020 project, which aimed to promote active transport in order to tackle urban congestion. The yearly CRC networking day prior to the opening of Velo-city 2018 was focused on urban challenges such as intermodality, bicycle parking, and partnerships for increasing the cycling modal share.

At the "Future Cycling" event organised in connection with the EU Cycling Strategy, a session was dedicated to cities and regions on why and how to invest in cycling using European funds. CRC members likewise had the opportunity to join our webinars providing training and advice on EU funding, the WHO Health Economic Assessment Tool (HEAT), and how to influence decision-making processes.

This year also marked the launch of the #VisionaryCities Series in which visionary local leaders share best practices and success stories aimed at making cycling in Europe better, safer, and more common.

ECF network of Scientists for Cycling: Making the bridge between research and practice The Scientists for Cycling network organised an inspiring workshop in the framework of the final conference of the FLOW and TRACE projects. Partnering with the Federal University of Rio de Janeiro (Brazil) the network invited researchers from all relevant academic disciplines to participate in the Scientists for Cycling sessions at the Velocity conference in Rio de Janeiro. More than 50 academics from Brazil, Latin America and all around the world participated in the presentations.

A joint symposium brought together researchers from the Scientists for Cycling network and from the UK-based Cycling & Society Research Group. Hosted by the Centre for Transport and Society at the University of the West of England in Bristol, the event featured 100 delegates and 44 presentations from a wide array of research fields.

The German Federal Environment Agency (Umweltbundesamt) published "Framing the Third Cycling Century" that was co-edited by ECF taking up and continuing the discussions from the International Cycling Conference 2017 in Mannheim, where ECF's network Scientists for Cycling was one of the coorganisers.

ECF Cycling Industry Club members founded new association: Cycling Industries Europe

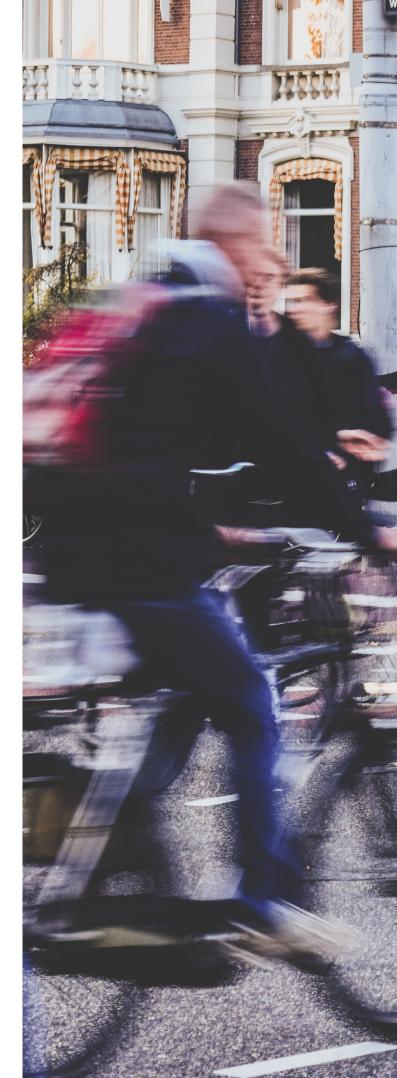
Leading cycling industry companies founded the new association 'Cycling Industries Europe' (CIE) out of ECF's Cycling Industry Club, which was originally created in 2011. At the event "Future Cycling" held in Brussels on 11 October, ECF and CIE signed a Memorandum of Understanding on their future collaboration, which includes the commitment of CIE to provide financial support for ECF. At the same event ECF and CIE also signed, with other stakeholders, a declaration to confirm their commitment to the goals of the EU Cycling Strategy.



ECF's World Cycling Alliance (WCA) network becomes an independent international association

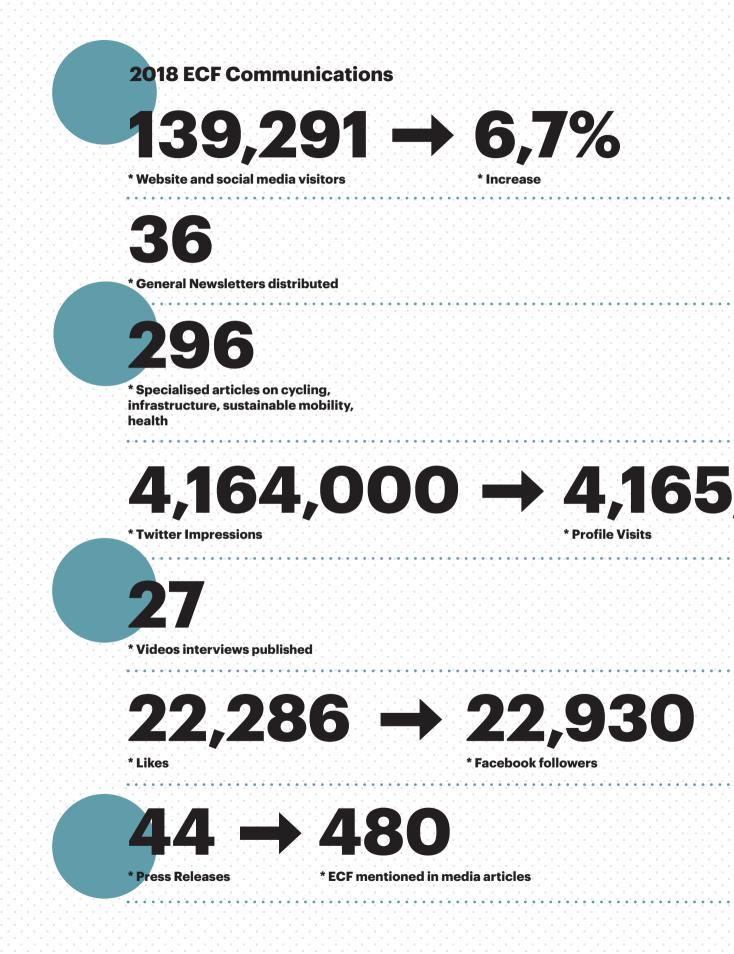
At the end of the year, ECF concluded a long process of formalising its WCA network. Initiated by ECF in 2014, and reaching fruition with the WCA officially declared as an independent, international nonprofit association by the Belgian government in December 2018.

The WCA is led by a board of 7 members from Africa, North America, South America, South Asia, East Asia, Europe and Oceania. The mission is to promote cycling as an important daily mode of transport as well as for leisure and tourism. The WCA firmly believes in the potential of cycling to help achieve the 2030 UN Sustainable Development Goals. The founding was officially agreed by the founding members at the network's Annual General Meeting in Rio de Janeiro on 11 June. The announcement to the global community was made during the 98th annual Transportation Research Board conference in January 2019 in Washington D.C. The launch announcement brought together members, partners and leaders from the health, mobility, planning, development and cycling industry sectors.





2018 Outreach





ECF Partnerships

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• EU Urban Agenda - Urban Mobility Partnership

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- Member of EU Tourism Manifesto Group
- Member of the Sum4All Consortium, a World Bank
 Initiative on Sustainable Mobility
- MoU with UNHABITAT. Prominent role in the 9th edition of the World Urban Forum, Feb 2018 in Kuala Lumpur, Malaysia
- WHO Global Action Plan on Physical Activity (GAPPA) 2018-2030, 'More active people for a healthier world'
- Partnership of Sustainable Low Carbon Transport (SLoCaT)
- Member of THE PEP Transport, Health and Environment Pan European Program
- ECF sits as a jury member for **the European Mobility Week Awards**
- Member of **CER's Community of European Railway and Infrastructure Companies, customer liaison group**
- MoU with UITP, International Association of
 Public Transport
- Supporter of the Covenant of Mayors

ECF has published 8 position papers in 2018 Supporter of the Covenant of Mayors European Commission, European Parliament and European Council

Overall until December 2018 ECF has published 15 specialised reports

Velo-city 2018 Rio 'Access to Life'

Velo-city 2018 Rio de Janeiro was the youngest edition of the conference ever, with 80% of delegates being under the age of 46. It was also the most gender balanced edition to date. This year's edition saw the highest level of local participation out of any Velo-city conference.

The main theme of the conference was Access to Life, with Lively Economy, Happiness & Quality of Life, Integrating Life & Transport, and Learn to Live as the subthemes. This was the first time a scientific track was integrated into the overall programme, coordinated by ECF's network Scientists for Cycling. This was the first time Cycle Tourism was featured on plenary level.

ECF had a role in about half of the sessions, either coordinating, moderating or speaking and organised two side events before Velo-city.

Velo-city 2018 reached a peak in social and other media in the month of the conference, including publications in O Globo, The Guardian, The Daily Telegraph and Huffington Post. Velo-city 2018 Rio de Janeiro welcomed a total of 1164 participants, making it the biggest non-European edition of Velo-city to date. 1164 participants 48 countries 80% of delegates under the age of 46 39% female delegates 125 Press passes 51 ECF Members and ECF Network 73 Sessions 34 Sessions with an ECF role 31 plenary speakers 48% female plenary speakers 156 speakers 41% female speakers 100,000 impressions in social media 575 articles published on Velo-city 306 articles published in June 2018



ECF Members: Changing Europe by national, regional and local cycling advocacy

83 ECF Members From 46 countries 64 Full members 19 associate members

2018 has been a very positive year for ECF members, with lots of impressive advocacy successes at national level, that are quickly changing the European cycling landscape.

ADFC (Germany): Through a massive public pressure campaign the federal 2019 budget for model cycling investment projects was increased by 20 million euros. The long-years lobby for a turning assist to detect cyclists at the front and side of lorries paid off (5 million Euro funding stream in 2019 for voluntary retrofitting). And a record of 170.000 people participated in ADFC's Fahrradklima-Test to monitor the cycling climate in German cities.

DCF (Denmark): The transport spokespersons from the entire political spectrum in the Danish parliament – from far left to far right - have been stating publically that Denmark needs a new big national bicycle fund that can assist municipalities all over the country in investing in safe, secure and segregated bicycle infrastructure.

Fietsersbond (Netherlands): Campaigning together with their local branches, the political parties' programmes for the local elections were successfully influenced by a survey filled by 45,000 people. Houten was awarded 'Cycling city of the year 2018'. **Fietsersbond (Belgium):** Prior to the local elections, all municipalities in Flanders received a good set of recommendations to make their communities attractive by adopting cycling policies.

Supporting local advocacy through the Leadership Programme: While the merit of these achievements rests entirely on our members' shoulders, we are glad to register that ECF has supported over the years 19 ECF members in building capacity in their national advocacy associations via ECF's Leadership Programme, financed by ECF's Cycling Industry Club. In 2018 6 ECF members enrolled in the threeyear long programme.

Three good examples of impact of the programme are:

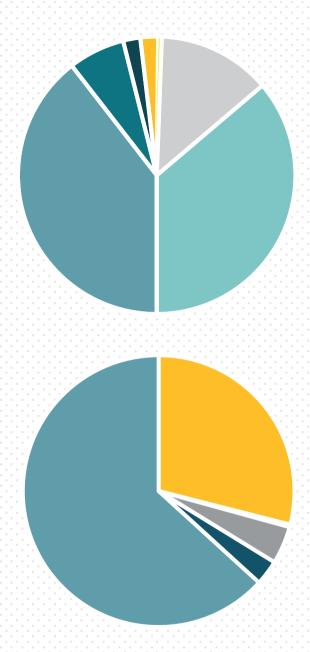
FIAB (Italy; followed the programme 2013 – 2015): The National government acknowledges now cycling as a legitimate means of transport, and passed new legislation calling for the promotion of cycling at all levels of government.

Minsk Cycling Community (Belarus; followed the programme 2017): Minsk Cycling Community convinced the Belarusian government to adopt an official concept of cycling development, and that Ukraine, under heavy pressure from the Kyiv Cyclists' Association, officially presented and adopted the Kyiv Cycling Concept, looking at doubling cycling in the capital.

FUB (France; followed the programme 2016-

2018): Thanks to the remarkable national campaign Parlons-Vélo ECF member FUB managed to have the French Prime Minister announce an ambitious new national cycling masterplan, including a dedicated national cycling fund.

Finance and Staff Organisation



ECF Accounts 2018 Income

- Membership fees | 13,2%
- Donations | 36,2%
- EU projects & operating grant | 39,5%
- Velo-city | 6,6%
- Subcontracting | 2,0%
- Other fees | 2,1%
- Other operating income | 0,4%

ECF Accounts 2018 Where the money went

- Personnel costs | 63,3%
- Services and other goods | 29,0%
- Depreciation | 0,3%
- Reserves | 4,5%
- Other | 3,0%

ECF is based in the European Quarter of Brussels. In 2018 the following staff members served ECF: Bernhard Ensink, Kevin Mayne, Adam Bodor, Wini Van Wonterghem, Marcio Deslandes, Fabian Küster, Ed Lancaster, Goran Lepen*, Holger Haubold, Ceri Woolsgrove, Randy Rzewnicki, Loes Holtmaat*, Carolien Ruebens*, Jesus Freire, Marco Ciarrocchi*, Zoe Kruchten*, Izabela Dumoulin, Ernst Fahrenkrug, Aleksander Buczyncski, Lilia Raicu, Florence Grégoire*, Niccolò Panozzo, Froso Christofides, Maria Gaton, Victor Turegano*.

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Aknowledgement EU

ECF members Members of ECF Cycling Industry Club Members of 'Cities and Regions for Cyclists' EuroVelo Coordination Centers Velo-city Host-cities

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European Commission

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