Benchmark and Market Study

Opportunities for Dutch cycling enterprises in Germany
How can the Netherlands assist in promoting cycling in Germany?

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Foreword

Dear reader,

this benchmark and market study is intended to give an overview of the opportunities of Dutch cycling projects and enterprises in Germany. It is primarily addressed to the participants of the Dutch Cycling Embassy who would like to start projects in Germany or wish to extend their existing collaboration with their German counterparts. The paper was developed during my internship at the Dutch Cycling Embassy from December 2015 to February 2016 and gave me the valuable opportunity to extend my knowledge about cycling in Germany and in the Netherlands.

The aim of the paper is to give you a first impression on the state of affairs of German cycling from a Dutch perspective as well as some hands-on advise on how to start your project in Germany. Therefore, the paper will not go too much into detail. If you are further interested the Appendix will provide you with references to more information on cycling in Germany.

The benchmark and market study has three parts that try to answer the following questions:

1) What is the situation of cycling in Germany in comparison to the Netherlands? The main part of this paper will give you an overview over the framework conditions that determine the quality of cycling in both countries.

2) How can the Dutch assist to improve cycling in Germany? This section explores the possible action fields of cycling enterprises in Germany by determining the potential and trends in cycling in the neighbour country. Moreover, this part will give you some very practical advise on how to approach German parties and a few best practice examples of projects that have been done by the Dutch Cycling Embassy in Germany in the past.

3) Where to go to and who to talk to? If you are interested to start a cycling project in Germany, the Appendix should give you an idea on where to start. It includes a list of relevant cycling conferences and trade fairs as well as important contacts from different fields within the cycling branch. You will also find references to further information on cycling in Germany in this final part.

In order to gather information for this paper, I mainly used the German National Cycling Plan 2020 published by the German Ministry of Transport in 2012. The NCP describes the strategy to be used to evolve the promotion of cycling in Germany during the time period from 2013 to 2020 and can be compared to the Dutch Masterplan Fiets to some extend (see chapter 1.3 for more information). For the information concerning the Netherlands, I mostly relied on the brochure „Cycling in the Netherlands“ about bicycle use and bicycle policy in the Netherlands, published by the Ministry of Transport and the Fietsberaad in 2009. Even though a lot has changed since 2009, this brochure still seems accurate today and provides a comprehensive account on cycling in the Netherlands.

Of course, I also received valuable information and insights on cycling in both the Netherlands and Germany from the team of the Dutch Cycling Embassy, its cycling experts and partners. I would like to thank everyone for their advise and support at this point.

Hendrike Hellmann
Delft, 26th of February 2016
1. Framework conditions: What is the situation of cycling in Germany in comparison to the Netherlands?

1.1 Some facts and figures

<table>
<thead>
<tr>
<th>The Netherlands</th>
<th>Germany</th>
</tr>
</thead>
<tbody>
<tr>
<td>16,8 million inhabitants</td>
<td>81 million inhabitants</td>
</tr>
<tr>
<td>18 million bicycles</td>
<td>72 million bicycles</td>
</tr>
</tbody>
</table>

On average...

<table>
<thead>
<tr>
<th>the Dutch</th>
<th>Germans</th>
</tr>
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<tbody>
<tr>
<td>• cycle 1100 km per year (of which 12% are made by e-bikes)</td>
<td>• cycle 380 km per year</td>
</tr>
<tr>
<td>• cycle 3 km per trip</td>
<td>• cycle 3,4 km per trip</td>
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Average bike price

<table>
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<tr>
<th>The Netherlands</th>
<th>Germany</th>
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</thead>
<tbody>
<tr>
<td>€844 (one of the highest average bike prices in Europe)</td>
<td>€528 (has been rising since e-bikes were introduced)</td>
</tr>
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</table>

Bike path network

<table>
<thead>
<tr>
<th>The Netherlands</th>
<th>Germany</th>
</tr>
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<tbody>
<tr>
<td>35.000 km (on 41.526 km²) (29% of the trails are located in North Brabant and Gelderland)</td>
<td>40.000 km (on 357.168 km²)</td>
</tr>
</tbody>
</table>

Commuter bike traffic

<table>
<thead>
<tr>
<th>The Netherlands</th>
<th>Germany</th>
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</thead>
<tbody>
<tr>
<td>25%</td>
<td>9%</td>
</tr>
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</table>

Relationship to the bike:

<table>
<thead>
<tr>
<th>The Netherlands</th>
<th>Germany</th>
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<tbody>
<tr>
<td>36% use the bike as their main means of transportation</td>
<td>12% use the bike as their main means of transportation (the bike is by far the most popular outdoor sports)</td>
</tr>
</tbody>
</table>

Source: ADFC Radwelt-Ausgabe 5.2015

1.2 Bicycle use in 2015

Germany

The popularity of cycling stagnates

What is the situation of cycling in Germany right now? Very recently, the Federal Ministry of Transport and the ADFC, the German Cycling Union, published the Fahrrad-Monitor 2015. The survey revealed that

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1 The data comes from different sources whose questions and methods do not necessarily match.
2 Available at: [http://www.bmvi.de/SharedDocs/DE/Anlage/VerkehrUndMobilitaet/Fahrrad/Fahrradmonitor-](http://www.bmvi.de/SharedDocs/DE/Anlage/VerkehrUndMobilitaet/Fahrrad/Fahrradmonitor-).
the popularity of the bicycle as means of transport actually stagnates among Germans. While the popularity of the car remains stable gaining an average grade of 1.8, the bike only obtained 2.4 while public transport dropped from 2.9 to 3.3.

One of the reasons for these results could be that almost every second German perceives the bike to be unsafe. While 52% of the interviewed persons stated that they felt “very” or “mostly safe”, 48% feel “rather not” or “not at all safe”. Safety is also a widespread reason to abandon the bike as a daily means of transport: 13% of the respondents claimed that they didn’t cycle to work or school because it’s too dangerous. Especially in cities, this is mostly due to too much car traffic.

It isn’t surprising therefore that roughly half of the interviewed persons demanded better cycle paths and more investment in already existing bike infrastructure. Germans do not feel that the government is really doing enough for cycling. Only 12% classified the Federal Government as cycling-friendly. Even though local authorities perform better in this category, roughly 80% of the respondents demanded that their local politicians should do more for cycling.

Even though bike infrastructure is perceived to be insufficient, many Germans are undeterred from using their bikes. Almost 40% use the bike several times during the week or every day, mostly for running errands or to go on excursions. Still, 38% of the interviewed persons use the bike “rarely to never”.

The Netherlands
Cycling is so popular that bike infrastructure is getting overloaded

Bike infrastructure also seems to be a problem in the Netherlands, but on an entirely different level. Even though the Dutch cycle lane system may well be exemplary to most other countries including Germany, a new report revealed that cycling has now become so popular that bike paths fill up to capacity.

The study undertaken by the SWOV Institute for Road Safety Research found that especially during rush hour cycling infrastructure is getting seriously overloaded so that crashes become more frequent. Cycling has continued to grow in the Netherlands over the past 10 years by +9% km, especially in the cities where the volume of cycling increased by 22%. Of course, this growth must be counted as a success, but it now becomes evident that infrastructure improvements in the Netherlands too are lagging behind.

While cyclists in Germany feel unsafe due to interfering car traffic, cyclists in the Netherlands have to be cautious of other cyclists. According to SWOV’s report many accidents happen thanks to poor road habits among riders. Bad behaviour like using the phone while riding or overtaking without a look behind is especially dangerous on bike lanes that are crowded with thousands of commuters. The report notes that 1000 cyclists end up in hospital every year after collisions with other cyclists.

It is worth mentioning however, that the number of serious accidents involving bicycles is still tiny in the Netherlands given the numbers using the system. In 2015, the Netherlands are the uncontested leader worldwide in terms of cycling modal share (27%) which is roughly more than double the cycling modal share of Germany.

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1.3 Cycling policy and its objectives

Germany

The National Cycling Plan 2020: Tackling climate change and health issues

Cycling policy has long been dismissed as a marginal issue in Germany. In the last decade however, the enormous problem solving potential of the bicycle has finally been recognized. Especially the adoption of the National Cycling Plan 2002-2012 (Nationaler Radverkehrsplan) in 2002 by the Federal Government is an evidence of this development. There are however large regional differences in terms of the effort to increase bicycle share, which is mostly due to the federal division of tasks: the Federal Government, the federal states and municipalities each have their different responsibilities and funding opportunities (see chapter 1.4).

Following the “National Cycling Plan 2002-2012” (NCP), the Federal Ministry of Transport published the recent “NCP 2020” which describes the strategy to be used to evolve the promotion of cycling in Germany during the time period from 2013 to 2020. Even though the NCP 2020 has been widely welcomed in Germany and praised as an excellent and comprehensive description of the status quo, it has not gone without critique. Both the social-democratic party SPD as well as the green party “Die Grünen” proposed motions to modify and enhance the NCP 2020. Unions in favour of cycling, like the VCD (Verkehrsclub Deutschland), criticised that the Federal Ministry of Transport fails to truly exploit its own scope of action, even though it gives good and important recommendations for the promotion of cycling to the federal states and municipalities. Moreover, mandatory ambitious goals and according financial and the provision of human resources are missing. All in all, critics claim that the implementation strategy still seems vague.

Objectives of the NCP 2020

The overall goal of the NCP 2020 is to reach a cycling modal share of 15% for Germany. But what is driving Germany to adopt a more cycling-friendly policy? By promoting cycling, the Federal Government hopes to be able to tackle various societal challenges: The issue of health plays a special role hereby. As in many other western countries, the lack of exercise is one of the key causes of lifestyle diseases such as obesity, high blood pressure and diabetes. Another key objective of the German cycling policy is to reduce climate change emissions as well as other environmental damages such as air pollution and traffic noise. In the light of demographic change, cycling is also meant to safeguard people's mobility and social inclusion especially in rural areas. Last but not least, the bicycle should contribute to urban development, for it is a sustainable means of traffic that requires less space in Germany's ever-growing urban centres.

The Netherlands

From the Masterplan Fiets till today

Unlike Germany and many other European countries, the Netherlands does not have a current national cycling strategy. Surprisingly, cycling is most developed in the Netherlands nevertheless (as measured by the Eurobarometer 2014 and by national modal split figures).

The last national document, the „Masterplan Fiets“ established by the Dutch Ministry of Transport, has been set out for the period of 1990-1997. The Masterplan is quiet remarkable in the sense that an integrated framework was chosen from the outset: Cycling and bicycle policy were expressly not conceived as objectives in themselves but rather as means to contribute to solving traffic and transport problems.
and/or restricting car use.\textsuperscript{11} As we can see today, integral bike policy works. Other countries like Germany are now – 20 years later – equally stressing the need for an integrated approach in their national bike strategies.

Another important feature of the Masterplan Fiets is its decentralised approach: Since its adoption, regions have been in charge of the development and promotion of cycling. The national government nonetheless supports the regions, in particular for investments in large projects such as cycle highways or bicycle parking in railway stations (see chapter 1.5).

**Objectives of Dutch bicycle policy: Ensuring safety and joy**
The main reasons to implement the Masterplan Fiets in the 1990s include the reduction of car traffic in order to improve safety and enabling mobility in limited space. Already back then, the potential of the bicycle as a healthy and environmental friendly means of transport had been acknowledged in the Netherlands.

Today, most Dutch municipalities have their own bike policies and underlying objectives that they want to accomplish with it.\textsuperscript{12} Just like in Germany, maintaining sustainability is a key objective as well as improving public health. The most important goal to be achieved by cycling policy however remains safety. The Dutch see bicycle use and improving traffic safety as inherently related: Statistics show that risks for cyclists are lower in regions with higher bicycle use (see fig. 1).\textsuperscript{13} In order to have people cycle on the other hand, cycling should be enjoyable, relaxing and safe.

By promoting the bicycle, Dutch municipalities are furthermore striving to provide a cheap and space efficient means of transport that simultaneously improves the liveability of residential areas. Increasing the accessibility of companies and facilities for cyclists and reducing the number of bicycle theft are also part of the objectives of regional bike strategies.\textsuperscript{14}

\begin{figure}[h]
\centering
\includegraphics[width=\textwidth]{figure1.png}
\caption{Relation between accidents and bicycle usage}
\end{figure}

\textsuperscript{11} Ministry of Transport, Public Works and Water Management: Bicycle Master Plan, 1999, p. 49.
\textsuperscript{12} Some Dutch municipalities implement an independent bicycle policy, while others integrate bicycle policy in the general traffic and transport policy.
\textsuperscript{13}Ministry of Transport, Public Works and Water Management: Cycling in the Netherlands, 2009, p. 19.
\textsuperscript{14}Cycling in the Netherlands 2009, p. 21, 26.
1.4 Organizational structure and stakeholders involved in cycling promotion in Germany

The German Federal Government has identified the promotion of cycling as a "Querschnittsaufgabe", a cross-sectional task that involves many different stakeholders (see fig. 2)\(^\text{15}\). The following offers a short overview about the different tasks and responsibilities of the Federal government, federal states and municipalities as well as non-governmental stakeholders in Germany.

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**Figure 2: Players involved in the promotion of cycling in Germany**

**Federal Government**

Just like the Netherlands, Germany follows a decentralised approach regarding the promotion of cycling. Within this decentralised framework the German Federal Government, which mostly acts through the Federal Ministry of Transport, has actually only little direct influence on cycling policy. It may influence local bike promotion schemes by setting priorities, providing funding, establishing a network between all relevant actors and by implementing public campaigns.

All in all, its supporting role can be compared to the Dutch national level where the state sets out frameworks, while decentralised authorities work out the policy in broad outline in their own plans. Moreover, the German as well as the Dutch state deal with legal issues surrounding traffic regulations. Unlike in Germany, the Dutch state also makes building decisions, for example regarding bicycle parking facilities. In Germany, this is in the hands of the federal states.

Important measures by the German state to promote cycling may be the establishment of

- a better legal framework (change of traffic regulations in 1997 and 2008 have already improved the situation of cyclists) and

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\(^{15}\) NCP 2020, p. 69.
setting up networks that facilitate the cooperation between different stakeholders, like the NCP-bike portal, working groups between the government and federal states as well as between different ministries).

Federal states
The 16 German federal states take a very direct influence on the promotion of cycling for they are closer to the municipalities. Their tasks include for example the distribution of funding, the establishment of new funding schemes, cooperating directly with municipalities or the promotion of inter-municipal cooperation. Therefore, their role equals that of the Dutch 12 provinces and 7 city areas, which ensure policy cohesion, allocate the annual subsidy funding and maintain the regional and inter-local bicycle network.

Between different federal states the significance attributed to cycling policy varies a lot: Some federal states like North Rhine-Westphalia have long been committed to the promotion of cycling and have therefore managed to increase the use of cycling. Also city-states with a high traffic congestion like Berlin, Bremen and Hamburg and federal states like Baden-Wuerttemberg and Brandenburg have been focusing more on the bicycle in recent years.\(^{16}\)

In order to promote cycling, German federal states have a variety of different measures at their hands:
- increasing funding;
- appointing of cycling coordinators;
- creating strategies to promote cycling;
- education policy – adding sustainable mobility to the curriculum;
- building law – determining the number of storage facilities for bikes;
- prevention and investigation of bike theft;
- encouraging public transport suppliers to improve the conditions for taking bicycles along.

Municipalities
In the Netherlands as well as in Germany, bicycle policy is primarily the responsibility of municipalities. Their main task is the design of the local bike infrastructure.

Again, there are considerable differences among over 11000 German municipalities when it comes to cycling. Some committed municipalities possess a modal share of cycling of 20% or even 40%. The leading group unites very different cities in terms of size: Berlin (12% bicycle share/3.4 million inhabitants), Cologne (16%/997,000), Bremen (22%/550,000), Münster (37%/270,000), Freiburg (26%/220,00) Potsdam (20%/150,000), Cottbus (22%/103,000) or Troisdorf (21%/77,000).

On the other hand, there are also – mostly smaller – municipalities that have until now put only little effort into cycling policy. One possible reason for this is that they are not forced to address the problem like regions with a high population density.

In order to better address the different starting positions of the municipalities, the National Cycling Plan 2020 introduces three stages of development: "starters", "climbers" and "champions" (see fig. 3)\(^{17}\). The bases for classification are, first, cycling’s share of the total traffic volume and, second, the existing level of (institutional) cycling promotion.


\(^{17}\) NCP 2020, p. 15.
Measures to promote cycling on a municipal level are:

- appointing of cycling officers;
- considering cycling in urban development planning as well as in structural changes and adjustments;
- a bicycle-friendly infrastructure;
- an equal or prioritized evacuation and cleaning of the bicycle network.

Other stakeholders
Like in the Netherlands, there are many other social institutions in Germany that (may) influence cycling policy, like for example companies, health insurance providers, schools and kindergartens, transport companies, retailers as well as the media.

1.5 Financing

Germany
A long way to go
As part of the National Cycling Plan, the German Federal Government allocates additional budgetary funds for the promotion of cycling. Under the first NCP in 2002, funds for the expansion of bicycle paths along federal highways were doubled to 90 million euros. Since 2004, an additional 4 million euros were provided for the expansion of tourist cycling routes along waterways while 3 million euros (since 2008) were made available annually for non-intensive measures, e.g. public campaigns.

In addition to the reserved federal funds, the Federal Government makes general funds for the improvement of traffic conditions in the municipalities available that can partly be increased by federal state funds. A Funding Guide on the NCP 2020 cycling portal provides municipalities and other stakeholders with information about existing funding options at all levels. Moreover, the Federal Government com-

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19 Available at: http://www.nationaler-radverkehrsplan.de/foerderfibel/ (18/2/2016).
missioned a brief study in 2012 to estimate the funding needs of local authorities. The figures are aimed to serve as a guideline for responsible stakeholders on the local level (see fig. 4 for details) and have been broken down by category (“starters”, “climbers” and “champions”). It was estimated accordingly that towns and cities, irrespective of their size, are likely to have the following funding needs per inhabitant and year:

- around 6 to 15 euros for the construction, maintenance and operation of the infrastructure, with 1 to 3 euros of this for routine maintenance alone;
- around 1 to 2.50 euros for parking facilities in the public realm; and
- around 0.50 to 2 euros for “soft” measures (communications, service, etc.).

The funding needs of the districts are, on the whole, lower. Here, the estimate is a total of between 1 and 6 euros per inhabitant and year.

<table>
<thead>
<tr>
<th></th>
<th>Infrastructure (renewal/reconstruction and structural maintenance)</th>
<th>Infrastructure (routine maintenance)</th>
<th>Sub-total (columns 1 + 2)</th>
<th>Parking facilities</th>
<th>Non-capital measures (incl. communications)</th>
<th>Other measures (cycle hire schemes, cycle parking stations)</th>
<th>Total (rounded)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Towns and cities</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Starters</td>
<td>5 - 12</td>
<td>1.10</td>
<td>6.10 - 13.10</td>
<td>1.10 - 2.50</td>
<td>0.50</td>
<td>0.50 - 2</td>
<td>8 - 18</td>
</tr>
<tr>
<td>Climbers</td>
<td>8 - 12</td>
<td>1.70</td>
<td>9.70 - 11.70</td>
<td>1.20 - 1.50</td>
<td>0.50</td>
<td>1 - 2</td>
<td>13 - 18</td>
</tr>
<tr>
<td>Champions</td>
<td>12</td>
<td>3</td>
<td>15</td>
<td>0.10 - 0.80</td>
<td>1</td>
<td>2</td>
<td>18 - 19</td>
</tr>
<tr>
<td><strong>Districts</strong></td>
<td></td>
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<tr>
<td>Starters</td>
<td>0.20 - 4.60</td>
<td>0.30</td>
<td>0.30 - 4.70</td>
<td>0.50 - 1.00</td>
<td>1</td>
<td></td>
<td>1 - 6</td>
</tr>
<tr>
<td>Climbers</td>
<td>0.30 - 4.10</td>
<td>0.10 - 0.40</td>
<td>0.40 - 4.50</td>
<td>0.50 - 1.50</td>
<td>1</td>
<td></td>
<td>1 - 6</td>
</tr>
<tr>
<td>Champions</td>
<td>2.40 - 3.00</td>
<td>0.50 - 0.70</td>
<td>2.90 - 3.70</td>
<td>1 - 1.50</td>
<td></td>
<td></td>
<td>4 - 5</td>
</tr>
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**Figure 4: Funding needs of towns, cities and districts in Germany**

In 2016, the promotion of cycling has been increased to more than 100 million euros, of which 98 million euros are made available for the construction and maintenance of cycling paths on federal highways. A fundamental problem remains however, that not all of these funds are actually retrieved by the municipalities. In Berlin for example, nearly a third of the funds expired in recent years. This might be due to the lack of personnel necessary for filing applications for funding.

The allocation of additional federal funds for cycling issues is an important step forward, since only 1,22 euros per capita were spent on cycling traffic in the past (in 2009, relative to the population) – a figure that clashes strongly with the estimated funding needs mentioned above. In comparison, the federal expenses for road construction amounted to 70 euros per capita in the same year.

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20 NCP 2020, p. 63.
21 NCP 2020, p. 62.
The Netherlands
The most generous in Europe

The Netherlands is the most generous country in Europe when it comes to the development of cycling. In 2010, Dutch authorities (national, regional and local) spent more than 24 euros per person in cycling projects and infrastructure.

Like in Germany, Dutch local authorities are responsible to implement measures to promote cycling. To fund the bicycle policy, most municipalities have specific budget allocations, but also use external funding sources. Bicycle projects can often ride on the back of larger infrastructural projects, construction projects, traffic safety projects or spatial developments. Municipalities can also call on subsidies, which are administered by provinces and city areas. For infrastructure in business parks, there are often individual arrangements, and EU funding is increasingly being used for bicycle projects. In some municipalities, bicycle parking is financed from parking incomes (car), while they may also be financed by private companies or through public-private ventures. In the municipalities with the most intensive bicycle policy, the issue is often one of substantial sums allocated on an annual basis to (infrastructural) bicycle policy.

1.6 Cycling culture

Germany
A car-dominated culture finally changing?

The car is deeply ingrained in the German culture. It is not only one of the most popular German products worldwide making the car industry one of the main pillars of Germany's economy. The car is also (still) a very important status symbol for many Germans.

To understand Germany's car culture, we need to go back in time: While the bicycle had been the predominant private means of transportation in the first half of the 20th century, the car soon took over. After World War II, the privately owned motorcar became more affordable for a wider population and was soon ever-present all over Europe. This development was especially strong in Germany, where lots of space was allocated to cars in the reconstructed cities. A veritable euphoria developed in the 1960s calling for "Autogerechte Städte", car-friendly cities, in which the whole living environment was supposed to be subordinated to car mobility.

Even when the insight took hold that motorized traffic was causing environmental and health problems as well as problems of congestion, the status of the car remained strong in Germany. This might be due to the fact that Germany's economy is very dependent on its car industry, which makes politicians reluctant to introduce policies that restrict car traffic.

However, there is a new trend emerging: The role of the car as a status symbol is declining, while a new "culture of cycling" develops. Changes are becoming apparent, for instance the declining rate of car access and use among young adults.

27 Cycling in the Netherlands 2009, p. 27.
The Netherlands

The bicycle: An everyday love affair

The Netherlands also saw the decline of cycling in the 1950s due to the rise of the car. What went differently than in other European countries?

The trend away from the bicycle and towards motorised transport only began to be slowed in the 1970s when Dutch people took to the streets to protest against the high number of child deaths on the roads: in some cases over 500 children were killed in car accidents in the Netherlands in a single year. This protest movement came to be known as the "Stop de Kindermoord", movement. The success of this movement – along with other factors, such as the oil shortages of 1973-74 – turned Dutch government policy around and the country began to restrict motor vehicles in its towns and cities and direct its focus on growth towards other forms of transport. Hereby, the bicycle was seen as being critical in making Dutch streets safer and towns and cities more people-friendly and liveable.

Nowadays, it is evident that Dutch cycling policy works: Cycling is so embedded in the Netherlands that virtually every child gets the first bicycle around the forth birthday and learns how to use it. Because the Dutch do not know a life without a bicycle, they consider cycling as something entirely ordinary. But what’s more important: The Dutch feel that, compared to other every-day means of transport, the bicycle is the most enjoyable (fig. 5).

![Figure 11: Emotions linked with various modes of transport. Source: Knowledge Institute Mobility, 2007](http://www.bbc.co.uk/programmes/p01lw88k)

**Figure 5: Emotions linked with various modes of transport in the Netherlands.**

1.7 Cycling infrastructure

Germany

Marked cycle paths increasingly popular

In recent years, many federal states have succeeded in providing substantial cycling facilities outside urban areas, comprising predominantly separated paths that can be shared by pedestrians and cyclists. There are now around 19,000 kilometres of cycle tracks running along federal highways alone. However, the level of provision differs greatly from one federal state to the next and is only high in a few exceptional cases, such as Schleswig-Holstein and Lower Saxony.

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30 http://www.bbc.co.uk/programmes/p01lw88k (18/2/2016).
31 Cycling in the Netherlands 2009, p. 21.
32 NCP 2020, p. 22.
Within urban areas, the situation is less clear-cut. While the Dutch try to separate cycle traffic from car traffic in these areas as much as possible, Germans tend to use solutions involving road markings more and more. Marked (advisory or mandatory) cycle lanes are considered to be a safe and – most of all – cost-efficient way to improve conditions for cyclists. Like in the Netherlands, local authorities also use solutions involving mixed traffic on the carriageway (e.g. in 30 km/h zones) and constructed cycle tracks. Particularly in smaller German municipalities however, there are still many shared footways/cycle tracks, which do not meet the different requirements of riders and pedestrians. In addition, there is still a great shortfall in the provision of parking facilities that causes problems especially in densely built neighbourhoods. Many federal states and regions have significantly expanded the directional signage for cyclists in recent years. While there are many signs for touristic bike paths however, there is often a lack in urban areas.

The Netherlands
Cycling according to the principles of “Duurzaam Veilig”
As already mentioned the main difference in terms of cycling infrastructure between the two countries is that the Netherlands tries to segregate bike traffic as much as possible from other traffic. A true innovation linked to this effort has been the classification of roads in accordance with the principles of “Duurzaam Veilig” or sustainably safe. According to this principle, roads with a speed limit of 50 km/h – which are mostly central “traffic arteries” – must have specific bike facilities. Other roads with a maximum speed of 30 km/h that often belong to residential areas do not require separated cycle lanes.

A well-established concept in the Netherlands is the fietsstraat (bike street), a road where bicycles are considered to be the primary and preferred form of transport and where cars and other motorised vehicles are only allowed “as guests”.

Another important difference between German and Dutch cycling infrastructure is, that the Netherlands has produced a universally valid Design Manual for bicycle facilities. It was first published in 1993 by CROW and describes all steps from the decision to promote cycling through to actual physical implementation. The manual was entirely revised in 2006 and also translated to English. The Design Manual introduces the five main requirements for bicycle friendly infrastructure:

• Safety
• Directness – short and rapid routes from origin to destination
• Cohesion – logical and cohesive routes
• Comfort – good surface, generous space and little hindrance from other traffic participants
• Attractiveness – an attractive and socially safe environment, without smell or noise inconvenience

These main requirements apply to the entire network of bicycle routes, but also to the facilities at road stretches and intersections.

In Germany on the other hand, a number of different technical reference frameworks for the planning, construction and operation of cycling infrastructure exist (“Guidelines for Integrated Network Design”, “Guidelines for the Design and Construction of Roads”, sections entitled “Alignment”, “Cross-Sections” and “Junctions”, “Guidelines for the Design and Construction of Urban Roads”, “Recommendations for Cycling Facilities” and the Advisory Leaflet on Directional Signage for Cyclists), none of which is solely or comprehensively dedicated to cycling infrastructure. In addition, these frameworks may only serve as a reference as long as they are not inconsistent with German traffic regulations.

33 NCP 2020, p. 22.
34 Available at: http://www.crow.nl/publicaties/design-manual-for-bicycle-traffic (18/2/2016).
35 NCP 2020, p. 24. German traffic regulations that are relevant to cycling infrastructure are the StVO and the VwV-StVO as well as – for the federal trunk road sphere – the Guidelines for the Legal Treatment of Roads passing through Built-
situation may be one of the reasons why German cycling infrastructure is not as developed and consistent as in the Netherlands.

2. How can the Dutch assist to improve cycling in Germany?

2.1 Give the bicycle more space!

The aim of this paper is, of course, to examine how to bring Dutch cycling expertise to Germany. However, it must be noted that both countries can actually learn from each other when it comes to cycling. Germany is for instance quiet strong in the field of technical innovations: may it be the development of multifunctional cycling highways along railways, like the "Nordbahntrasse" in Wuppertal, or new innovative bicycles, like the hydrogen pedelec designed by Linde. The touristic cycling network "Radnetz Deutschland" with its over 200 signed routes can also be taken as an example by the Dutch.

Needless to say that cycling is very advanced in Germany as compared to other European countries. In comparison to the Netherlands however, where modal shares as well as the popularity of cycling are extremely high, Germany still lacks behind (see fig. 6 and 7).

A comparison of modal shares of cycling in Europe
(Netherlands = 100 %)

![Comparison of modal shares of cycling in Europe](image)

Source: European Commission, 2011, own graph

Figure 6: A comparison of modal shares of cycling in Europe

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Up Areas and the Principles for the Construction and Funding of Cycle Tracks along Federal Highways where the Federal Government is responsible for construction and maintenance.

38 NCP 2020, p. 41.
39 NCP 2020, p. 7.
Figure 7: the evolution of the percentage of people who answered “cycling” to the question of the Eurobarometer: “On a typical day, which mode of transport do you most often?”

Germany can therefore learn from the Netherlands, when it comes to the question of how to get people on bicycles. In order to answer this question, the Netherlands came up with several solutions, the most important being: Give bicycles more space!

**Give bicycles more space!**

In Germany, there is still a clear hierarchy favouring cars over bicycles. In order to make cycling more attractive and safe, Germany could use some of the measures that the Netherlands developed to promote cycling, walking and traffic calming, such as:

- Reducing car access to city-centres and create car-free areas;
- Making parking in city-centres more expensive;
- Constructing cycle paths and reducing road space for cars;
- Reducing maximum speed on the majority of urban roads to 30 km/h or less;

As has been noted in chapter 1.6 however, policies that limit the use of the car are very unpopular in many parts of Germany. In order to show the positive effects of the above-mentioned measures, it would be necessary to establish pilot projects like car-free city centres in selected places. To date, no German city has banned cars from the inner city, because implementing pilot projects is – again – unpopular in German policy making. One can expect that German policymakers will therefore need a lot of good reasons and best practice examples (e.g. from the Netherlands!) in order to take a first step into the right direction. It will be a great challenge to make them understand how much there is to gain from the Dutch way of being more flexible in planning.

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In order to give bicycles more space, Germany should not only limit car traffic, but also improve its cycling infrastructure regulations. Cycle paths for instance, are generally much narrower in Germany than in the Netherlands and do not allow cyclists to overtake each other. Wider bike lanes are needed especially when pedelec and e-bike use increases.

2.2 Potential and trends in cycling in Germany

Potential to 2020
In accordance of the National Cycling Plan 2020, Germany’s Federal Government determined the potential of cycling in the whole Germany to reach 15% share of traffic by 2020. Hereby, the Netherlands with its high cycling share naturally served as an example. To reach the 15% target, a continuous effort needs to be made: Different starting positions in the federal states, regions and municipalities (“starters”, “climbers” and “champions”, see chapter 1.4) as well as a different topography, settlement pattern and social structure require a sophisticated approach to exploit the potential. German authorities hope that the impetus of the NCP may contribute to the goal, that Germany can call itself a cycle-friendly nation by 2050.

Current trends
E-bikes and pedelecs
On the German cycling market, electric mobility is currently developing at an especially dynamic pace. In recent years, sales figures of “pedelecs” (electrically assisted cycles) have risen by 30 to 50%. In 2007, only 70,000 such vehicles were sold, but by 2011 this figure had risen to 310,000. Recent forecasts and surveys indicate that this trend will continue undiminished.

Pedelecs enable new regions to be opened up for cycling and address new target groups, because the electrical assistance means that cyclists can reach higher average speeds, cover longer distances and ride up hills more easily.

Recently, a discussion has evolved around the question on how to best offer incentives to buy or use pedelecs. One way is to establish pedelecs as “Dienstfahrräder”, company bicycles. For company cars, it is the rule that employers bear most of the costs. This approach should also apply to company bicycles. A recent step in this direction has been to include bicycles in company car regulations, another has been the implementation of the project “E Bike Pendeln”, e-bike commuting, of the City of Berlin. As part of the project, which focuses on commuters going to work, pedelec use will be tested, studied and promoted in everyday urban traffic.

Cycle highways
Since 2010 increasing efforts are made in Germany to build “Radschnellwege”, fast cycling highways, or similarly designed, high-quality cycling routes. Among the most important projects is the “Radschnellweg Ruhr” (RS1) in North Rhine-Westphalia (100 km), which is intended to offer commuters an attractive link between the cities like Duisburg, Mülheim an der Ruhr, Essen, Gelsenkirchen, Bochum, Dortmund, and Hamm. Besides the RS1, more cycling highways are planned in North Rhine-Westphalia. For this, the

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43 NCP 2020, p. 77.
federal state government proclaimed a planning competition in 2013 and awarded five projects. Another positive step ahead is North Rhine-Westphalia's decision to treat cycling highways and federal roads for cars equally.

Realised and planned cycle highway in other federal states include Germany's first e-bike highway in Göttingen, the "eRadschnellweg Göttingen", 6 cycling highways in the metropolitan area of Munich and the first largely covered bike path in Berlin, called "Radbahn". Bicycle-sharing systems

As in many other European countries, public bicycle-sharing systems are also spreading in Germany. There is no uniform bike rental scheme like the Dutch OV Fiets – which is actually a unique concept Europe-wide –, but instead several vendors specialized in this service that operate in different cities. The two marked leader's are Call-a-Bike, operated by the Deutsche-Bahn subsidiary "DB Rent", and Nextbike, serving by now more than 30 German cities and 14 countries worldwide.

Cycling apps

Like anywhere else, apps are also trending in Germany. Regarding cycling they may be used for navigation, tracking, itinerary planning, finding a bike repair shop or a rental bike. Some popular cycling apps include "Komoot", a navigation app, "Strava", a GPS-tracking app, the "Bike Repair" and the "Call a Bike" app.

Mobility cards

Mobility cards like the Dutch OV-Chip Card make travelling with different means of transport easy and comfortable. In a large country such as Germany however, it is very difficult to introduce such a universally valid card.

The Deutsche Bahn is nevertheless in the process of expanding the “Bahncard”, their discount subscription programme, to a fully fledged “mobility card”, offering discounts on other transport related services, such as hotel reservations, car rental, car sharing, public transport, bicycle hire, and other services. Other transport providers have started similar projects mostly on a regional basis.

2.3 Dos and Don’ts: What is important to know when collaborating with German parties?

In theory, Germans like the Dutch way of finding solutions: They admire the Dutch for being more flexible and for their ability "to think outside of the box". In practice however, they will probably be reluctant to differ from the German "Gründlichkeit" when executing projects. Another German particularity is their high esteem of the technical aspect: While it is very important to the Dutch to “polderen”, to find a com-

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promise that suits everybody, Germans tend to base their decisions much more on technical arguments and on facts and figures. Engineers have therefore often a lot of influence. Below, you will find a list of Do’s and Don’ts to be kept in mind when collaborating with Germans. However, your German partners will know that you are not entirely familiar with German practices and will therefore be likely to give you a wider range of tolerance.

<table>
<thead>
<tr>
<th>Do’s</th>
<th>Don’ts</th>
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<tbody>
<tr>
<td>• Be prepared: Ensure strong substantive presentations that are groomed to perfection</td>
<td>• You won’t have a good turn with poor preparation</td>
</tr>
<tr>
<td>• Hierarchy: Find out how it works in an organisation</td>
<td>• First-name basis is fundamentally wrong</td>
</tr>
<tr>
<td>• Be on time</td>
<td>• Don’t go straight to business: Give it some time</td>
</tr>
<tr>
<td>• Mind the use of “Du” and “Sie”</td>
<td>• Don’t keep it superficial: Build up trust</td>
</tr>
<tr>
<td>• Work on relationships: Making contact via personal contacts is very important</td>
<td>• Present solutions to existing problems in a diplomatic way</td>
</tr>
<tr>
<td>• Be present and show your face</td>
<td>• Do not discuss private matters: Stay more formal than you usually would</td>
</tr>
</tbody>
</table>

2.4 Best practice: Past projects in Germany of the Dutch Cycling Embassy

Organisation of the Stand during the exposition and organisation of the Program during VELOBerlin 2015

In 2015, the Dutch Cycling Embassy was invited as exclusive partner for the fifth edition of VELOBerlin. For this important exposition, the Embassy organized the Holland Stand, which showed beautiful Dutch Design bicycles and bicycle storage facilities from Beixo, BoughBikes, Roetz-Bikes, Urban Arrow, Callock, Jan Kuipers Nunspeet and Fietsdiensten.nl.

In addition NHTV presented together with DAT Mobility 'Bike Print', an innovative tool to analyse bicycle movements. The city of Amsterdam and the engineers of Goudappel Coffeng and Team Red exchanged knowledge and experiences with the colleagues of the municipality of Berlin. Heijmans inspired the visitors with a presentation about Cycling Highways. And the Fietsplatform offered the visitors information in order to go cycling especially in Netherlands.

The Netherlands presented itself as the bicycle country par excellence. Around 14,500 visitors came to VELOBerlin, which attracted a lot of publicity from the media like RTL 2, Deutschlandradio, Tagesspiegel, RBB Abendschau, N24, Berliner Zeitung, and Deutsche Welle.

Image 1: The Holland Stand
Embassy Lab "Berlin, Fahrradstadt!?"

Prior to the VELOBerlin, the Dutch Embassy VELOBerlin Embassy organized a lab session. During the lab, Dutch cycling experts exchanged knowledge with experts from Berlin and tried to jointly answer the question whether Berlin is a “Fahrradstadt”, a bicycle city. The “Embassy lab” began with presentations on mobility issues and solutions by InnoZ.

Following the session, Mr Pieter Litjens (Deputy Mayor of Amsterdam), together with bike experts from Amsterdam, the Dutch Cycling Embassy and several other traffic experts, explored Berlin by bicycle (see image 2)\(^{59}\). They were accompanied and guided through the city by Mr Gaebler (State Secretary for Transport, Senate Administration for Urban Development and Environment in Berlin) and Mr Horn (top traffic official for the entire city of Berlin).

The exchange of ideas, plans and solutions for certain traffic situations benefited significantly from the presence of various experts from the rest of the city (Bezirke), interest groups such as the ADFC and knowledge institutions such as the Fahrradakademie. Among the topics discussed: parking policy, governance, safety measures and equipment of public space according to the “shared space” principle.

The session finished with recommendations by Mr Aluvihare (Public Space expert of Amsterdam) concerning policy cohesion and governance structure. Mr Gaebler and Mr Horn gratefully accepted the invitation for a return visit to Amsterdam to see the way the bicycle fits into the everyday Amsterdam traffic.

Visit of Baden Wuerttemberg’s Ministry of the Interior, for Building and Transport in May 2014\(^{60}\)

In May 2014, a delegation from Baden-Wuerttemberg led by Minister Joachim Hermann came to visit the Öresund region, Amsterdam, Rotterdam, the province of North Brabant and London during three days to collect best practice examples in the field of sustainable mobility. The Dutch Cycling Embassy helped to organize their stay in the Netherlands.

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On the second day, the delegation arrived in Amsterdam and participated in an information event about the promotion of electric mobility in the Netherlands. Likewise, the promotion of cycling and cycling infrastructure was an important topic with Dutch traffic experts. Also in Amsterdam the participants were given a guided cycling tour and could thus experience cycling in the Dutch capital first-hand.

On the third day, Minister Hermann visited the port of Rotterdam, the third largest port in the world and the largest deep-sea port in Europe. After a boat tour, the Minister met the port director Mr Allard Castelein in order to discuss about inland vessels as a means of transportation for goods and people.

During a visit to the Tesla plant in Tilburg, the delegation exchanged knowledge with the factory staff on new drive systems and their future.

In the words of Minister Hermann, the delegation received diverse and valuable inputs during their visit for the further development of new mobility concepts in Baden-Wuerttemberg: “It is impressive to see how far cities like for example, Amsterdam, Copenhagen and Malmö have developed cycling in order to relieve the inner cities from motorized traffic, noise and air pollution.”

3. Appendix: Where to go to and who to talk to?

3.1 Save the date: conferences and trade fairs

Networking, training, information
Fahrradakademie
The Fahrradakademie of the German Institute of Urban Studies (difü) offers a comprehensive training for players on the local level in the area of promoting cycling in Germany. Within its framework single and multi-day seminars are offered at various locations as well as field trips. High-level speakers with many years of practical experience provide solutions for the most important practical problems and thus help to increase the promotion of cycling to a new level.

Visit www.fahrradakademie.de for more information.

Fahrradkommunalkonferenz
Every year since 2007, the Fahrradakademie in collaboration with municipal umbrella organizations organizes a large Fahrradkommunalkonferenz, a municipal cycling conference. The results are documented online and made available.

Visit www.fahrradakademie.de/fahrradkonferenz/ for more information.

Nationaler Radverkehrskongress
During the Nationaler Radverkehrskongress, the National Cycling Congress, senior politicians and experts from government, industry, research and associations from Germany and neighboring countries come together to deal with the subject cycling during presentations and discussions. It is an event under the National Cycling Plan.

Visit https://www.nationaler-radverkehrskongress.de/ for more information.

Conference and trade fair schedule

<table>
<thead>
<tr>
<th>Date</th>
<th>Title</th>
<th>Location</th>
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<tbody>
<tr>
<td>25.02.2016</td>
<td>AGFS-Kongress 2016: Radschnellwege</td>
<td>Essen</td>
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<td></td>
<td>• <a href="http://www.agfs-nrw.de">www.agfs-nrw.de</a></td>
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<tr>
<td>25. - 28.02.2016</td>
<td>Fahrrad Essen</td>
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<td></td>
<td>• <a href="http://www.fahrrad-essen.de">www.fahrrad-essen.de</a></td>
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<tr>
<td>05. - 06.03.2016</td>
<td>rad16 - Die Fahrradmesse</td>
<td>Fürth</td>
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<td></td>
<td>• <a href="http://www.rad16.de">www.rad16.de</a></td>
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<tr>
<td>06.03.2016</td>
<td>4. Osnabrücker Fahrradmesse</td>
<td>Osnabrück</td>
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<tr>
<td>06.03.2016</td>
<td>18. ADFC-RadReisemesse</td>
<td>Bonn</td>
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<td>12. - 13.03.2016</td>
<td>RAD + OUTDOOR</td>
<td>Bremen</td>
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<td>• <a href="http://www.rad-outdoor.de">www.rad-outdoor.de</a></td>
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<tr>
<td>20. - 22.03.2016</td>
<td>Berliner Fahrradschau</td>
<td>Berlin</td>
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<td></td>
<td>• <a href="http://www.berlinerfahrradschau.de">www.berlinerfahrradschau.de</a></td>
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<tr>
<td>12.-13.04.2016</td>
<td>3rd European Conference on Sustainable Urban Mobility Plans</td>
<td>Bremen</td>
</tr>
<tr>
<td></td>
<td>• Subject: Planning the Efficient City</td>
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<tr>
<td></td>
<td>• <a href="http://www.eltis.org">www.eltis.org</a></td>
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<tr>
<td>15.-17.04.2016</td>
<td>E-Bike Festival Dortmund 2016</td>
<td>Dortmund</td>
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<td></td>
<td>• <a href="http://www.ebike-festival.org">www.ebike-festival.org</a></td>
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<tr>
<td>16. - 17.04.2016</td>
<td>VELOBerlin</td>
<td>Berlin</td>
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<td>• <a href="http://www.bonn.radreisemesse.de">www.bonn.radreisemesse.de</a></td>
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<td></td>
<td>• <a href="http://www.vivavelo.org">www.vivavelo.org</a></td>
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<tr>
<td>18. - 20.05.2016</td>
<td>International Transport Forum</td>
<td>Leipzig</td>
</tr>
<tr>
<td></td>
<td>• Subject: Green and Inclusive Transport</td>
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<td></td>
<td>• <a href="http://www.internationaltransportforum.org">www.internationaltransportforum.org</a></td>
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<tr>
<td>18.-19.06.2016</td>
<td>VELOFrankfurt 2016</td>
<td>Frankfurt a.M.</td>
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<td></td>
<td>• <a href="http://www.velofrankfurt.com">www.velofrankfurt.com</a></td>
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<tr>
<td>31.08.2016</td>
<td>EUROBIKE 2016</td>
<td>Friedrichshafen</td>
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<tr>
<td>04.09.2016</td>
<td>• <a href="http://www.eurobike-show.de">www.eurobike-show.de</a></td>
<td></td>
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<tr>
<td>28.07.2017</td>
<td>Tour de France Opening</td>
<td>Düsseldorf</td>
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<tr>
<td></td>
<td>• <a href="http://www.letour-duesseldorf.de">www.letour-duesseldorf.de</a></td>
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</tbody>
</table>
3.2 Contacts

Cycling associations (Verbände)
The Zweirad-Industrie-Verband (ZIV) is a national advocacy and service provider of the German and international cycling industry.
http://ziv-zweirad.de/

The VSF e.V. is a non-profit trade association in the bicycle industry. Its members include bicycle retailers, manufacturers, wholesalers, service providers and non-profit organizations.
https://www.vsf.de/

The AGFS (the Association for Pedestrian and Bicycle-friendly Cities, Townships and Districts in North Rhine Westphalia) is a municipal network that promotes "Nahmobilität" (local mobility). The municipal network includes today 71 cities, townships and districts members.
http://www.agfs-nrw.de/

Knowledge institutes
The Deutsche Institut für Urbanistik (Difu) is the largest urban research institute in Germany providing research results, training and information to cities, municipalities, local government and planning associations.
http://www.difu.de/

Cycling advocacy
The Allgemeiner Deutscher Fahrrad-Club ADFC (German Cyclist’s Association) is the advocate for cycling in Germany. It works with cities, state and federal governments to improve the conditions for everyday cycling as well as cycling for tourists.
http://www.adfc.de/

The Verkehrsclub Deutschland e. V. (VCD) is a traffic association that fights for more social- and environmentally-friendly mobility for all road users.
https://www.vcd.org/

Cycling tourism
Tourism associations on a national level:
http://www.nationaler-radverkehrsplan.de/links/#category147

Cycling tourism in Germany's federal states:
http://www.nationaler-radverkehrsplan.de/links/#category166

Dutch Embassy and consulates in Germany
Ambassade van het Koninkrijk der Nederlanden in Berlijn

- General: bln@minbuza.nl
- Dutch Cycling Embassy’s contact: Sanne Westra (Adviseur Milieu en Mobiliteit)
  Email: sanne.westra@minbuza.nl

Consulaat-generaal te Düsseldorf
- General: dus@minbuza.nl

Consulaat-Generaal te München
- General: mun@minbuza.nl
Dutch Cycling Embassy's contact:
Ulrike-Claudia Pulzer (Medewerker Cultuur en Communicatie)
Phone: +49 89 2060267-16

Netherlands Business Support Offices in Duitsland:
http://duitsland.nlambassade.org/organization/netherlands-business-support-offices

Nederlandse consulaten in Duitsland:
http://duitsland.nlambassade.org/organization/consulaten

Media
Since 2003, the pressedienst-fahrrad wants to draw more public attention to the bicycle and its use. It is supported by cycling institutions, organizations, companies and associations.
http://www.pd-f.de/

velobiz.de is an editorial portal of the bicycle sector in German-speaking countries, focusing mainly on people from the bicycle trade and industry.
http://www.velobiz.de/Portal/Default.aspx

RadMarkt is addressed to all who deal professionally with the bicycle, primarily to bicycle retailers.
http://www.radmarkt.de/

3.3 Further information

The German bicycle portal in English:
http://www.nationaler-radverkehrsplan.de/en/

German Bicycle Expertise in English language:
http://www.nationaler-radverkehrsplan.de/en/transferstelle/

National Funding programme "Klimaschutz im Radverkehr":
http://www.klimaschutz.de/radverkehr

Country page Germany of the RVO:
http://www.rvo.nl/onderwerpen/internationaal-ondernemen/landenoverzicht/duitsland

Do's and Don't's in Germany:

Economic Network Germany of the Dutch Embassy in Berlin:
http://duitsland.nlambassade.org/zaken-doen