The Urban Road Safety Index

The road safety perception in 25 European cities Edition 2023





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The Urban Road Safety Index

How do you feel in traffic?

Dear reader,

After a culmination of years of groundwork and individual measures by individual countries and member states, the European Union (EU) in 2021 finally adopted its 'Vision Zero' policy. The aim is for zero fatalities on roadways by 2050. To stimulate action right away, the EU also added an interim goal: by 2025, serious accidents should be reduced by half.

In 2021, according to EU figures, 22.000 people were killed in traffic in the EU. The goals the EU has set for itself and member states are therefore monumental. Many governments, local, national and international, have picked up the gauntlet. So have many research institutes and companies. To reach the goals the EU set, it is safe to state that everybody needs to do their part.

By mapping road infrastructure in great detail, Cyclomedia operates at the forefront of advances in road safety in Europe. While (inter)governmental statistics on road safety have been improving year by year, we've identified an area where significant contributions are still needed: reporting on road safety as experienced by road users themselves.

More specifically, we partnered with independent research agency Multiscope to focus on the perceptions of safety among inhabitants of some of Europe's major cities. The research, along with a background article on Vision Zero and expert interviews, is included in this whitepaper. Among the questions we delved into are: What factors contribute to how city dwellers feel about safety? How does the shift to electric vehicles impact their actual and perceived safety?

This is the second edition of our research into road safety in Europe. We hope it serves as both inspiration and motivation for you to take action. Achieving zero fatalities on European roads is the ultimate goal.

Best regards,

Serge Lupas CEO Cyclomedia

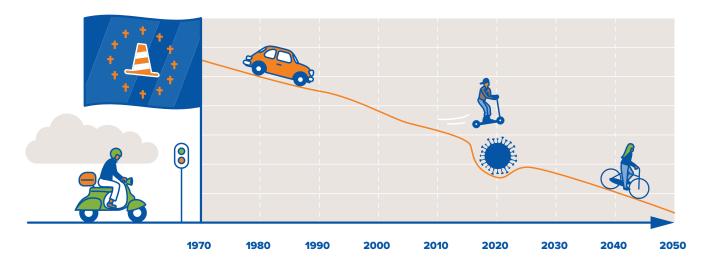


About Cyclomedia

Cyclomedia is the worldwide leader in digital visualization of outdoor spaces, delivering insights through the most accurate 360° street-level visualizations for over forty years. Using Al-driven analytics, we deliver insights to build a better world in the future. We develop, build, and operate the world's most advanced 'mobile mapping' systems that visualize highly populated urban areas in Europe and North America. The up-to-date and accurate data that we collect each year, is deployed by professional users, supporting governments and businesses in making cities greener, more accessible, smarter, and safer.

Aiming for zero

With the Vision Zero strategy, the European Union aims for zero traffic fatalities by 2050. Is this realistic? 'It's crucial that in addition to Europe, all member states also commit to European goals,' experts say.



What's the status of road safety in the European Union (EU)? Asking the question leads to a maze of statistics. With 27 diverse countries, there are many different situations, numbers, and ways to interpret them.

Dudley Curtis, spokesperson for the Brussels-based advocacy group European Transport Safety Council (ETSC), discusses the complexity at the micro-level: 'Take the Netherlands. It has seen a significant increase in bicycle accidents, but there are also more cyclists, especially older people who can continue cycling longer thanks to e-bikes.' The underlying question is complex: Is road safety declining, or are the elderly in the Netherlands generally healthier? There are many factors at play, and in various ways in the different EU member state.

Of course, there are lots of actual statistics. Several organizations, ranging from the European Commission (EC) to the ETSC, the intergovernmental International Traffic Safety Data and Analysis Group (IRTAD), and various national statistics bureaus, provide data. Mortality rates adjusted for population size are often used as a metric. However, for these data, the quality varies wildly. Sometimes for instance, only police records are available, whereas police records combined with hospital data are generally more comprehensive.

Positive trend

The data broadly show a positive trend. According to EC research, the mortality rate in EU countries has dropped by 17%, from 54 to 46 deaths per million inhabitants over the past decade. If we consider another period, from 2001 to 2016, the mortality rate even decreased by 53%. Diving in deeper, there are large disparities within Europe: Sweden (21 deaths per million inhabitants) and Denmark (26) perform much better than Romania (86) and Bulgaria (78).

Globally, Japan had 26 deaths per million in 2021, Australia had 43, the United States 129, and Colombia 142. If you consider the EU as a whole as a developed economy (which is debatable), then in terms of road safety, the political union is doing well.

No room for complacency

Still, there is no room for policymakers to rest on their laurels. As the EU's Road Safety Policy Framework 2021-30 states: 'More than 25,000 people still die on European roads every year, and more than 135,000 are seriously injured.' Additionally, the decline in the number of road fatalities has stagnated in recent years, except for the COVID-19 years of 2020 and 2021.

For some years now, the EU, calling the number of road casualties 'unacceptable' in its policy framework, has been taking the initiative to improve road safety. Policymakers have introduced the goal of Vision Zero: zero deaths and serious injuries on European roads by 2050. An interim goal is to halve the number of deaths and injuries by 2030 compared to 2018.

The term Vision Zero wasn't originally coined by the EU. The phrase was initially used for the so-called Safe System approach, introduced in the 1990s by the Netherlands and Sweden. In the Netherlands, it was called Sustainable Safety, while in Sweden it was named Vision Zero, explains Letty Aarts, the chief researcher at the Dutch Foundation for Scientific Research on Road Safety (FSRRS). 'The underlying idea has remained the same. The system should be designed to prevent traffic accidents as much as possible.'

Blaming the road user

This idea stands in stark contrast to the traditional notion of blaming the road user. 'When a road user crashes into a tree, one could say: "He wasn't paying attention." But you could also argue: "Had the tree not been there, the accident would not have been so severe"', Aarts elaborates. This second approach places responsibility on those managing the roads to eliminate as many risk factors as possible.

So what's happening in the context of EU goals? And is the European Union's goal realistic?

In its pursuit of a safer system, the EU focuses on four main intervention areas: infrastructure, vehicle safety, safe road use (speed, alcohol and drugs, distractions, use of protective equipment such as helmets), and quick and efficient emergency aid.

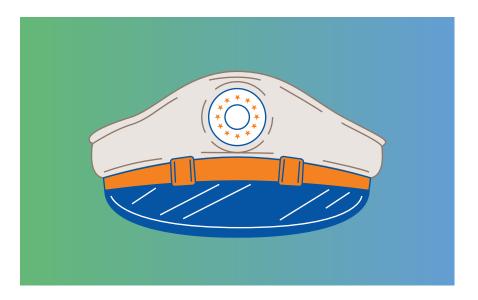
Most legislation in the area of road safety is national or even local. Large cities often decide their own road safety measures. But Europe also has its tools. The most significant are the guidelines set by the European Commission, which serve as laws imposed on member states.

Cross-border traffic enforcement

A good example is crossborder traffic enforcement, says advocate Curtis. 'If you're a Frenchman caught speeding in the Germany, the Dutch authorities have the means, thanks to EU laws, to force you to pay the fine.'

Curtis provides another example, specifically safety standards for infrastructure, particularly for the so-called E-roads, which have guidelines on signalling, road design, and speed limits. Driving licences are another area of regulation'

Perhaps most importantly, according to Curtis, the EU sets standards for vehicle safety. 'Every new car sold in one of the twenty-seven EU countries must meet minimum safety standards. For example, all new cars sold in the EU must have had an ABS anti-lock braking system since 2004 and an electronic stability program since 2011.'



In 2022, a whole new set of mandatory safety technologies was added, such as an autonomous emergency braking system, intelligent speed assistance, and lane assist. For inner-city traffic, mandatory parking sensors and a mandatory rear-view camera are important, among other things. Curtis says, 'These technologies are now in every new vehicle that comes to market. This is a classic example of EU policy. It's also a big success story and it has been the EU's standard approach for many years.'

Largely voluntary

Then there is the second—and politically more challenging aspect of EU policy: European integration. In addition to the guidelines, the EU is trying to put the Vision Zero concept on the map in all member states. 'Since member states are mostly in charge of their own traffic laws, the EU cannot do much more than incentivise,' says Aarts.

Yet the EU is also successful here. Aarts says: 'More and more countries are adopting the Safe System approach and are moving towards risk-based policies.' She points out that

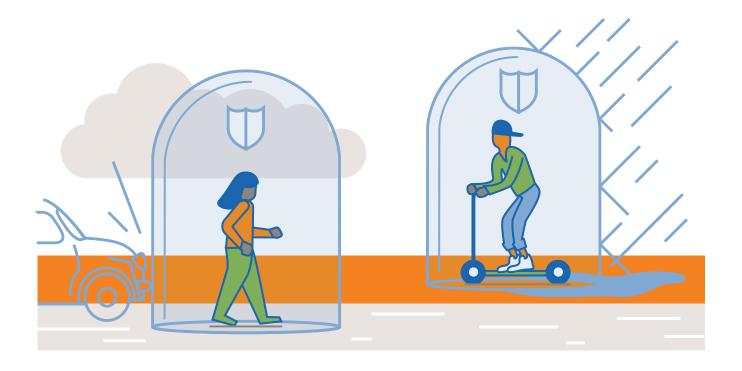


there is increasing international cooperation within the EU, with more and more countries participating. 'The aim is to better identify those risk factors so that countries can base their policies on them and make Vision Zero a reality.'

Researcher Aerts refers to organisations such as ETSC, with the EU Road Safety Exchange program. There are also market initiatives, such as Euro NCAP—a nonprofit organisation that tests car safety. And EuroRap, a non-profit that assesses the safety of European roads and collaborates with local authorities and national automobile clubs. 'In general,' Aerts states, 'you can say that Western Europe is leading the way in developing the Safe System approach. The Scandinavian countries, in particular, are far ahead.'

Positive

Is enough being done? It's clear that the EU can't do it alone. Ultimately, all the ideas, both from the EU and from many initiatives in the field of road safety, must lead to a lot of action. Initially, the first interim goal is to halve the number of traffic injuries and fatalities by 2030. Aerts points out that in the Netherlands, for example, MP Jaco Geurts submitted a motion in 2021



to work on this interim goal. The motion was passed by the House of Representatives, but the cabinet did not prioritize it. 'FSRRS has looked into whether that halving by 2030 is feasible, and it turned out to be very difficult,' says Aerts. 'So the question to politicians is: what are you going to do about it?'

In general, based on conversations with the two mentioned and a number of unmentioned interviewees, Europe is on the right track in the field of road safety. All countries—some more than others-are working to make improvements in areas such as enforcement, legislation, road networks, and speed limits. Lately, there has also been a lot of attention to vulnerable road users: pedestrians, cyclists, and new categories like electric scooter and monowheel riders.

Especially in cities, where vulnerable road users are overrepresented, caution is advised. In several countries the arrival of more and more vulnerable road users is being met with 30 km/h zones and vehicles with pedestrianfriendly fronts—mandatory across Europe since 2022 and technological systems that respond to pedestrians or cyclists.

The way forward

What is the way then forward for governments? 'It's crucial to set long-term goals,' says Curtis of advocacy group ETSC. 'How do you achieve a whole-of-government approach to meet the 2030 target? What are the criteria, who is responsible, how do you align the relevant authorities at a national level to achieve that goal?' Wealthy Western European countries should not take their lead over Eastern European countries, often with less developed infrastructure, for granted. Curtis adds: 'Take Poland, for example. There is support at the highest level. You need resources, you need time, and you need money. Safer traffic doesn't just 'happen'.' Road safety should be a top priority in the highest regions of politics.

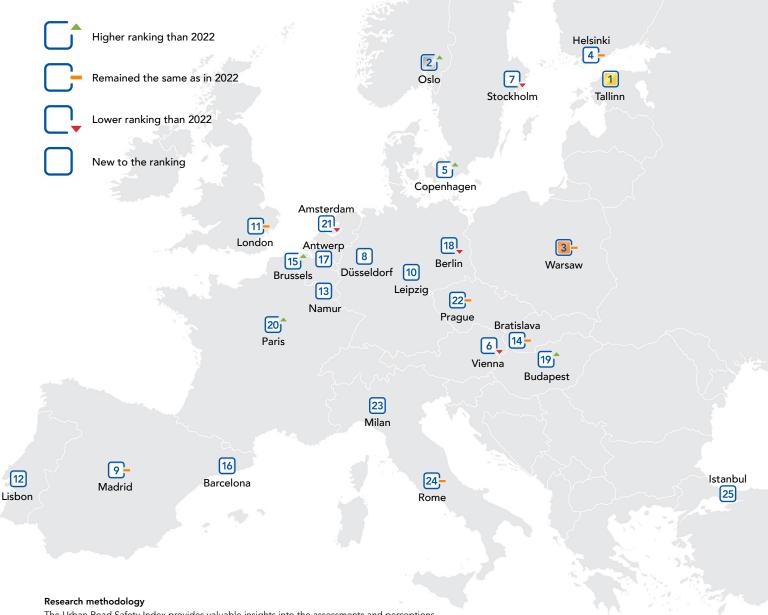
The Urban Road Safety Index

How safe do you feel in traffic in the city in which you live?

When it comes to how safe people feel while moving around in European cities, the majority of people tend to feel safe rather than unsafe. People in Tallinn and Oslo feel the safest of all. At the bottom of the Index, in Istanbul, Rome and Milan, the majority of people feel rather unsafe than safe while moving around in their cities.

Compared to last year's Urban Road Safety Index, Amsterdam, Vienna, Stockholm and Berlin scored less well. Newcomer Tallinn grabs this year's first place. Paris, Budapest, Oslo and Copenhagen do better compared to last year.





The Urban Road Safety Index provides valuable insights into the assessments and perceptions of road safety in European cities by its residents. Fieldwork of the research was conducted from June 30th to July 20th, 2023 by research agency Multiscope, with a participation of 7,515 respondents. The results pertain specifically to the surveyed cities and the designated fieldwork period, applying them to other situations may require careful consideration.

2 Road safety in Europe

How safe do you feel in traffic in the city where you live?

In European cities, the perception of road safety varies considerably. When it comes to electric bikes and scooters, most people are okay with them. However, in places like London, Paris, Brussels, Madrid, Amsterdam, and Barcelona, many want these vehicles banned. London has the highest agreement, with 60% of people supporting a ban.

Inhabitants opinions differ about how well their authorities do improve road safety. In Rome, a big 74% think they're not doing enough and is ending last on this list. Warsaw, Vienna and Oslo are performing very well on this matter.

Inhabitants of cities Istanbul and Rome are most afraid to use the roads in their city because of the danger of accidents. But in Vienna, very few people are fearful of city roads due to accidents.

I think my city should ban electric shared bicycles and (motor) scooters

The authorities of the city in which I live do enough to improve road safety in the city

I am afraid to use the roads in my city because of the danger of accidents

		Ban shared e-bikes and scooters in my city	Authorities do enough to improve road safety	Fearful of city roads due to accidents
	Amsterdam	5	17	17
\bullet	Antwerp	11	5	11
	Barcelona	6	9	5
	Berlin	7	24	22
۲	Bratislava	19	18	8
\bullet	Brussels	3	11	10
	Budapest	21	20	6
	Copenhagen	13	4	15
	Düsseldorf	22	19	23
Ð	Helsinki	14	7	24
C	Istanbul	18	13	1
	Leipzig	15	22	20
•	Lisbon	24	14	14
	London		10	12
	Madrid	4	6	9
0	Milan	23	23	4
\bullet	Namur	12	16	7
	Oslo	17	3	21
0	Paris	2	15	3
	Prague	8	8	13
0	Rome	10	25	2
	Stockholm	9	12	18
	Tallinn	25	21	19
	Vienna	16	2	25
$\overline{}$	Warsaw	20	1	16

3 Cycling in the city

Exploring urban cycling safety and preferences among European city residents

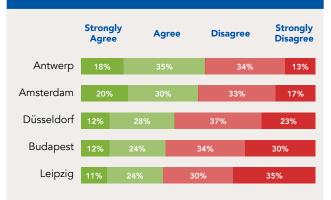
Helsinki (67% agreement) and Copenhagen (+30) have the safest cycle paths in the eyes of their residents. On the flip side, 76% in Rome see their cycle paths as unsafe.

When it comes to safety while cycling due to poor street lighting, Rome and Milan stand out with scores of +52 and +32 respectively. Vienna is much safer with only 25% feeling concerned. Copenhagen and Helsinki have low worries at 26%. A rule for cyclists to wear helmets doesn't stop most folks from biking in European cities. Just Antwerp (+6) plans to bike less, with 53% agreeing. Amsterdam is split, while other cities don't change their biking plans.

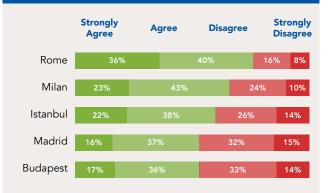
Across Europe, people usually feel safer in cars than on bikes. Lisbon, Rome, and London strongly agree at +68. Copenhagen and Amsterdam slightly agree at +16 and +12.



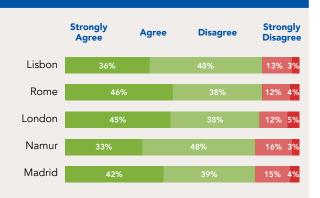
If a helmet requirement is introduced in the city for cyclists over 18, I expect I will use my bicycle less often



I sometimes feel unsafe cycling because there are not enough street lights in public places in my city



I feel safer in a car than on a bike in my city



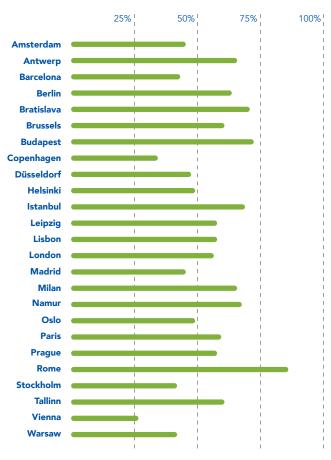
4 Road quality and traffic situations

Most dangerous traffic situations

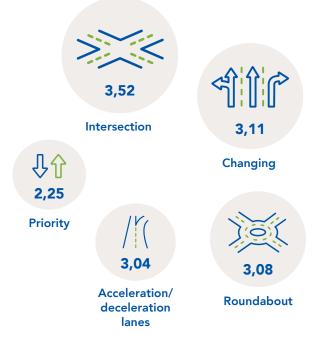
On average, intersections are considered relatively unsafe (3.52). Among different age groups, there is minimal variation, although males tend to perceive them as less safe (3.50) compared to females (3.58).

Changing lanes seems to be a bit safer (3.11) than intersections. Interestingly, the 35-54 age group scores lowest (2.87), while older individuals (55+) show higher concerns (3.09). Males are more confident (3.35) in changing lanes compared to females (3.05).

The 'scores' displayed are the weighted average positions residents placed the different traffic situations in. A maximum score of 5 would mean every resident found that traffic situation to be the most unsafe. A minimum score of 1 would mean every respondent found that traffic situation to be the least unsafe.



• I think the quality of the roads in my city creates dangerous traffic situations



"I think the quality of the roads in my city creates dangerous traffic situations."

In cities like Rome (85%), Budapest (73%), and Bratislava (70%), a significant portion of residents agree that the quality of their city's roads creates dangerous traffic situations. These cities show relatively higher levels of agreement compared to others.

Cities like Copenhagen (22%) and Stockholm (17%) have higher percentages of residents totally disagreeing compared to the average.

Some cities, such as Helsinki and Oslo, seem to have a more balanced opinion. While a notable portion of their residents disagree, there is a significant percentage in the "agree" category as well, reflecting a mix of views on road quality's impact on traffic safety.

'Cyclists were seen as a safety problem for far too long.'

In the safe and sustainable city of the future, a significant portion of trips will be made by bicycle, according to Professor of Transport Engineering John Parkin. However, British cities are only just starting to seriously consider how to establish a network of cycle lanes. "Civil engineers have prioritized long-distance traffic over local urban routes."

An interview with John Parkin Professor of Transport Engineering at University of the West of England

How do British cities, especially London, fare in terms of cycling infrastructure?

Cycling policies in the United Kingdom are far from unified, as it is a regional responsibility. For the national government, the climate crisis is not a priority, and consequently, cycling policy isn't either. In Wales however roads are seen as a tool to limit emissions and promote active forms of transport. In cities like London, Coventry, Manchester, and Birmingham, I see real change.' 'The major difference with a country like the Netherlands is that the Dutch know how to build cycling networks. In the UK, we are still not proficient in that area. The willingness is there, but the older ways of thinking are deeply ingrained among senior civil engineers.'

What is this old way of thinking?

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'Cyclists historically were seen as a safety problem. The solution was to remove them from the road and dump them onto the footpath. That is a subpar solution because a cyclist travels five times faster than a pedestrian. Furthermore, as a result of this approach, no route network was developed to facilitate cyclists in reaching their destinations. A coherent and comfortable cycling network inherently provides safety.'

'In the UK, there is a backlash against lowtraffic neighbourhoods because we have never fully realized the extent to which motor vehicles are dangerous.'

Is that why even in London, where the number of cyclists is relatively high, the availability of cycle lanes feels somewhat random?

'Yes. Where we have already build protected cycle lanes, they have often been placed between intersections. That's where building them is straightforward. But at the intersections it becomes more complicated. We Britons often neglected this because we found the problem too difficult. In the training sessions I conduct, I always emphasize the need to consider the entire urban network.' 'Start with the city centre, or the station, or the university, and build the web of cycle lanes from there. We have already done this for cars, buses, and railways, but not for cyclists. That is the missing link in British designs. Thankfully, it's improving now.'

Are you optimistic that a shift will come?

'Absolutely. There is a new generation of civil engineers with the right knowledge and skills. Now we need to become familiar with active forms of transportation. It starts at the local level, in major cities, where the shift has already begun. After that, progress can be swift.'of this approach, no route network was developed to facilitate cyclists in reaching their destinations. A coherent and comfortable cycling network inherently provides safety.'



5 City livability

Every city needs more greenery

According to residents of European cities, their city needs more greenery. Especially residents of Istanbul and Lisbon feel this way, with over 90% of residents agreeing.

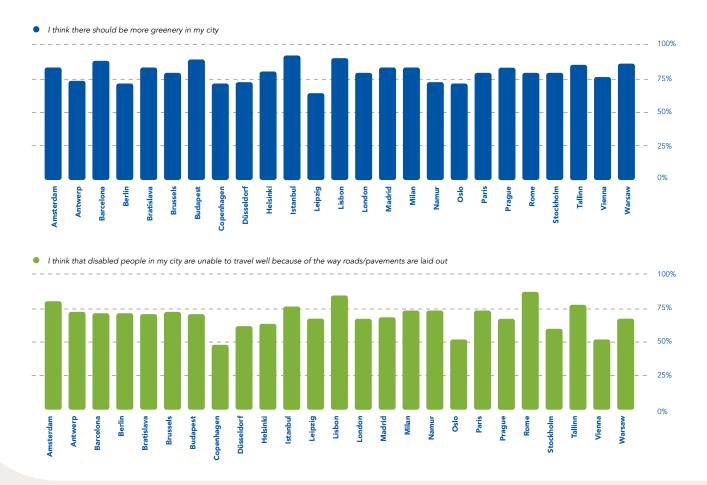
Although most residents of Copenhagen and Oslo also agree that their city needs more greenery, a relatively large percentage of residents (29%) feels like the city does not need more greenery.

Copenhagen as a positive exception



The majority of residents of almost all European cities agree that disabled people are unable to travel well in their cities because of the way roads and pavements are laid out.

Residents of Rome and Lisbon especially agree, with 87% and 85% agreeing with the statement respectively. Slightly more residents of Copenhagen feel that disabled people can travel well in their cities, though almost half (49%) of residents disagree.



Interview

'An e-scooter is not a toy.'

Emergency room doctor Dr. Silvia Barrero Martín, affiliated with the Doce de Octubre hospital in Madrid, led the largest Spanish study into the dangers of e-scooters. 'You can't blame everything on the vehicles.'

In just a few years, the e-scooter has become a very popular mode of transport in Spain. Over half a million are in circulation in the country. A significant seven percent of Spanish households own one. But with the e-scooters came the accidents. In 2021 and 2022, eighteen people died in e-scooter-related accidents in Spain. The number of injuries is in the many hundreds.

An interview with Dr. Silvia Barrero Martín Emergency room doctor, Doce de Octubre hospital in Madrid



You conducted large-scale research on the consequences of accidents involving e-scooters. Why was this necessary?

'In 2018, we saw a sharp increase in the number of people admitted after accidents with e-scooters. These ranged from a wide array of fractures to other injuries. Some of these were severe. I increasingly needed advice and help from specialized doctors in the traumatology department who deal with the most complicated traumas. That's when you know something's up.'

Many Spaniards believe e-scooters are the most dangerous vehicles on the road. Are they right?

'You can't solely blame a vehicle for accidents. The user of the vehicle, their age, and experience also play a role. Weather conditions matter. In a car with air conditioning, you can drive comfortably at 37 degrees Celsius, but on an e-scooter, such high temperatures can affect your reaction time.' 'It's also important to consider whether roads are designed for e-scooter usage. If e-scooters remain a part of our traffic, which seems likely, it's time to consider if road layouts need to change or if separate lanes for e-scooters might be beneficial.'

'E-scooters are so popular, banning them is almost impossible. But they can be used more safely.'

Would better integrating e-scooters into traffic solve the problem?

'More is needed. People not wearing helmets sustain more severe injuries. Wearing a helmet on an e-scooter is mandatory, but many young people ignore this, and there's little enforcement.'

'Additionally, it's a good idea to remind people regularly that they're using a mode of transport and are participating in traffic. An e-scooter is not a toy, even if it might look like one.'

If you were in charge for a day in Spain, what decision would you make regarding e-scooters?

'As a doctor, it's not my place to decide whether e-scooters should be allowed on public roads or not. What I can do is show the consequences of how people currently use e-scooters and the options available to reduce accidents.'

'Riders of e-scooters need to be made more aware of the risks in as many ways as possible. Enforcing helmet more strictly use would make a significant difference in the severity of accidents. I believe the e-scooter in Spain is so popular that banning it as a mode of transport isn't an option anymore. But they can be used more safely.'

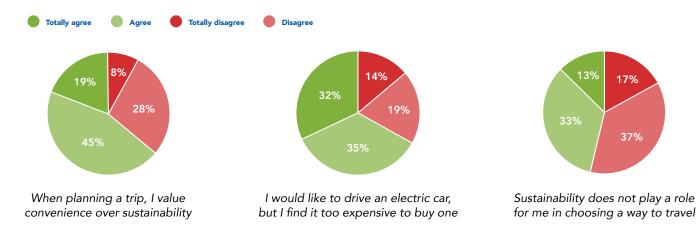
Convenience is valued over sustainability

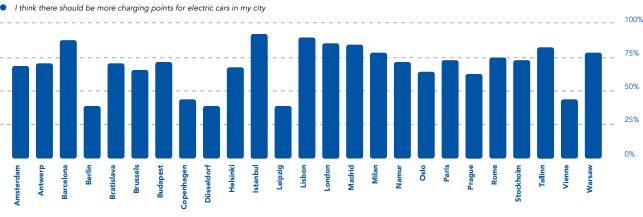
Many people care about convenience the most, but there are differences. In Tallinn, Istanbul, and London, most people (75%, 74%, and 73%) like convenience more than being sustainable. On the other hand, in Warsaw, Amsterdam, and Brussels, fewer people (57%, 58%, and 58%) feel the same way about convenience.

Istanbul strongly wants more places to charge electric cars (91%). But this feeling is not shared in Berlin, Leipzig, Düsseldorf, Vienna, and Copenhagen. Berlin, especially, doesn't want more charging points, with 75% against.

Lots of people want to drive electric cars, but they find them expensive. Istanbul has the most agreement (88%), while in Prague, half of the people agree and the other half disagree (50%).

People's ideas about how important being sustainable is when traveling vary. Brussels stands out because many people there don't think it's very important (59%). On the other hand, Rome and Milan have the least agreement, both at 37%.





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75%

25%

0%

'The car takes the top spot in the hierarchy.'

Blanka Klimešová (45) believes that there's too much space for cars in Prague. That's why she joined a foundation advocating for a different kind of transportation policy focused on pedestrians. 'In practice, people tend to exceed the established speed limits. 'Walking through Prague isn't very dangerous. There are sidewalks and crosswalks in most places.' The city is working to improve public spaces. But still, she says, 'there's a lot of room for improvement.' That's why Klimešová joined the Pěšky městem – Walking through the City foundation eight years ago. 'I consider it an important topic. There isn't any other NGO in the Czech Republic specifically for pedestrians.'

An interview with Blanka Klimešová Pěšky městem – Walking through the City foundation



How safe do you feel in Prague's streets?

'On a scale where 1 is unsafe and 4 is safe, I'd say somewhere between 2 and 3. The feeling of safety is subjective. It's different for pedestrians compared to, let's say, drivers. That's why our organization focuses on how comfortable people feel on the streets, how welcome they feel in traffic. Praque is clearly designed for cars. If there's a hierarchy of road users, cars are at the top.'comfortable cycling network inherently provides safety.'

How does this play out in practice?

'Prague is a highly motorized city. The city has 1.2 million inhabitants and about a million registered motor vehicles. By European standards, this ratio is high, twice as much for instance as in Vienna. Nobody dares to touch the car. For Czechs, the car symbolizes freedom, the right to choose how to participate in traffic.' 'There's little debate about the environmental impact or the influence all these cars have on quality of life and the public space. Many discussions with the local government revolve around parking. Parking spaces come at the expense of pedestrian areas. Pedestrians have to move onto the road and that makes them less safe.'

'The city is working to improve public spaces. But still, she says, 'there's a lot of room for improvement.'

What is Prague's administration doing to improve the situation?

'That depends on the location within the city. The local administration is decentralized, and individual districts have a lot of autonomy. Policies depend on who wins in the local elections. We need politicians who have the courage to reduce car traffic. Next year, a project will start to reduce traffic along the river (the Vltava river runs through the middle of the city) by making car drivers pay for road usage. We'll see if it works.'

What solutions does Pěšky městem propose?

'One of our projects is Safe Routes to School. Every year we choose three to five schools in Prague and assess traffic safety in the area. We conduct surveys and prepare a traffic study. We then make recommendations to improve safety and present these to the local government. The project has gained a lot of credibility with the authorities. They know our proposals are technically sound.'

'Our findings stem from the needs of the local community. Initially, we sit down with children, parents, and teachers. By doing so, we look at the problem from the inside, not from the outside.

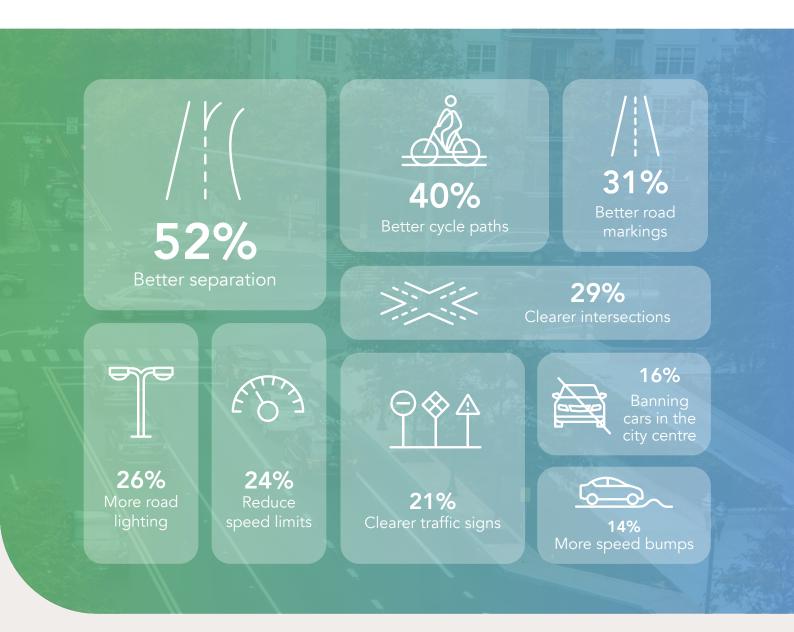
This has been our approach since 2002, and we've made about a hundred traffic situations safer.'

7 Improving urban road safety

What to do to improve urban road safety?

Cities and traffic are in constant motion. Enhancing road safety and promoting better understanding requires more than just rules like helmet-wearing or other traffic solutions. Local governments must change cities and roads to accommodate factors like increased traffic speed and electric vehicles. Our goal should not be mere avoidance but active resolution of traffic issues. To make streets feel safer, it is important to listen to people who use the roads: What do they like? What do they need? What do they not like? If we gather useful information, we can plan cities and roads that are easier to use and work better.

If we design traffic systems based on what users want and what is safe, we can create a safer place to be, aiming for Vision Zero in the next few decades.



Be in touch



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To find out more about the results and how Cyclomedia's visual data can help with improving road safety, contact us at info@cyclomedia.com or visit our webpage.

Local governments already working together with Cyclomedia on mobility challenges





Stadt Frankfurt am Main

