



# South of Scotland Cycling Partnership Strategy

SEPTEMBER 2022



# TABLE OF CONTENTS

South of Scotland Cycling Partnership Strategy

**INTRODUCTION**

03

**SECTION 4 - OUR OPPORTUNITY**

23

**SECTION 1 - THE VISION**

07

**SECTION 5 - WHERE ARE WE NOW  
MILESTONE PROJECTS**

28

**SECTION 2 - CASE STUDIES**

09

**SECTION 6 - GETTING IT DONE**

36

**SECTION 3 - CYCLING PARTNERSHIP  
PRIORITY THEMES**

19

**SECTION 7 - DETAILED DELIVERY PLAN  
APPENDIX**

40

Please click on any of the contents above to go to that page





# INTRODUCTION

This is the South of Scotland Cycling Partnership Strategy, forged through a TEAM South approach rooted in collaboration and cohesion to our shared vision **“By 2032 our South of Scotland communities are shaped around and include ALL of our people and cycling is the most popular choice for shorter everyday journeys and embedded into the daily fabric of the lives of our residents and experiences of our visitors”**. By successfully delivering the vision our region will be recognised as Scotland’s leading cycling destination and a world-class cycling destination of excellence.

Our strategy has been created to capture all of the opportunities currently available or in planning by the South of Scotland Cycling Partnership. The partnership is a coalition of professional partners, national agencies and local authorities who represent the views and opinions of 1000’s of South of Scotland residents, enterprises and visitors and cover a diverse range of interests. Each partner has reviewed their existing programme of activity and have put forward their views as part of the development process to get to this final strategy.

Cycling in Scotland is entering a watershed moment with the recent publication of a range of national strategies which all support and detail their ambition to affect wide-spread behavioural change of both our residents and visitors to prioritise sustainable transport methods over the car. The development of the cycling partnership strategy supports no fewer than 10 national policies, strategies & growth deals.



# INTRODUCTION (cont'd)



As the region's first pan-south strategy it is important to build on the existing efforts that have made our region a success but importantly it asks our partners, stakeholders, communities, and industry to commit to areas of strategic focus to create and secure new opportunities in the short, medium, and long term which protect our position, accelerate our capabilities, and deliver transformational change.

The strategy has a 10-year timeframe and encompasses all aspects of cycling in Dumfries & Galloway and the Scottish Borders. The delivery plan has three distinct timeframes which will ensure we optimise the immediate opportunities presented by Scotland being the first ever nation to host all 13 UCI disciplines of cycling world championships in 2023 with 11 full days of competition taking place here in the South of Scotland. Medium term we expect to see improvements in cycling infrastructure and successful implementation of a range of projects from our themes and priorities. Over the long term this plan enables us through our South of Scotland strategic cycling partnership to demonstrate the collective progress being made in delivering our aims and objectives including the pressing need to deliver against our regional net zero commitments and to make cycling more inclusive and not just a choice for those who can afford it or access it freely.

We believe by working together across cycling and partnership networks we can champion the unique power of the bike. We recognize that our position of being a host destination for the

# INTRODUCTION (cont'd)

2023 UCI Cycling World Championships, coupled with the raft of opportunities presented through national, regional, and local strategies, could reinforce South of Scotland's reputation as the perfect stage for events. The 2023 UCI Cycling World Championships will also be a catalyst for meaningful change and progress in our region – continuing to transform our reputation and make cycling part of the normal, everyday lives for all.

Our South of Scotland Cycling Partnership Strategy will be accompanied by a detailed delivery plan which identifies specific projects, schemes, initiatives, and interventions which are already activated or in planning. It also importantly highlights actions required which do not yet have an activation partner or budget and therefore will require additional work across the partnership to make it happen. This strategy will provide an anchor from which future decisions on investment can be supported and made.



## POLICY DRIVEN

RES: South of Scotland Regional Economic Strategy  
NSET: National Strategy for Economic Transformation  
UCI CWC 2023: Unlocking the Power of the Bike  
Climate Change Plan 2018-2032 Path to Net Zero  
National Transport Strategy 2: Improving Connections, Changing Lives  
Borderlands Growth Deal  
UK Government: Shared Prosperity  
Scottish Cycling: Developing a Nation of Cyclists  
Strategy for Scottish Mountain Biking, 2019-2025: Leading European Mountain Biking  
ESEC RD: E'Burgh & SE City Region Deal  
Transport Scotland: Active Travel Framework

WHY  
NOW?

## GLOBAL INCREASES

Sales  
Participation  
Societal Value

## ONCE IN A LIFETIME

Scotland: The Perfect Stage (National Strategy)  
2023 UCI Cycling World Championships  
Enduro World Series  
Scottish Enduro Series  
UCI Gravel World Series  
Galazo Gran Fondo World Series  
UCI E-Sports Series  
Olympic Extreme Sports - Bike Inclusions

# SECTION 1

## The Vision

By 2032 our South of Scotland communities are shaped around and include ALL of our people and cycling is the most popular choice for shorter everyday journeys and embedded into the daily fabric of the lives of our residents and experiences of our visitors.



**REP**  
South of Scotland  
Regional Economic Partnership



# STRATEGY OUTCOMES

## EVENT DESTINATION OF CHOICE

Host Destination of Choice by UK, EU & International Cycling Governing Bodies

## HAPPINESS & WELLBEING

Health & Wellbeing has improved across all tracked metrics including happiness, serious diseases & mental health

## ACCESS FOR ALL

Cycling is inclusive  
Access to bikes is available to all

## ACTIVE TRAVEL

10 Year Infrastructure Plan  
Transport Priority: People Over Cars  
Integrated Cycling & Transport Networks enhance accessibility  
Connected Communities using Active Travel Paths For Daily Commute



## SUSTAINABLE ECONOMY, ENVIRONMENT & COMMUNITIES

Cycling Industry Business Support Strategy  
Sustainable Net Zero Inward Investors  
Businesses set-up, scale-up and accelerate growth  
On-shoring of Bike Manufacturing to South of Scotland  
Tourism, Events & Investments Support Fragile Communities

## SPORTS DEVELOPMENT PATHWAYS FOR ALL

South of Scotland supplies next generation of world class cycling athletes across all disciplines & genders.

## BEST CYCLING HOLIDAY DESTINATION

Scotland's Leading Cycling Holiday Destination  
European Destination Cycling Destination of Excellence  
Global Recognition for Quality of Cycling Holiday Experiences  
Destination Promotion supports Scotland's Transition to Net Zero, Protection & Considerate Enjoyment of cultural & natural assets





# Case Study 1 - Cycling Without Age Peebles

Despite being part of a much larger global non-profit initiative, Cycling Without Age Peebles has been making invaluable connections within their local community with the aspiration of ensuring their older populations are seen, active and included.

Founded in 2012 in Copenhagen by Ole Kassow, Cycling Without Age is now represented in 52 countries and has provided more than 2.5 million rides for over 575,000 people.

Ole wanted to help elders get back on their bicycles, but he had to find a solution to their limited mobility. The answer was a trishaw and the offer of free bike rides to the local nursing home residents.

Cycling Without Age Peebles makes use of the generosity and kindness of those living within the Scottish Borders town, simply asking that volunteers – known as pilots - to sign up to take one or two elderly passengers, referred to as seniors, out on a bike ride when they can.

As well as assisting those who are elderly in getting active, the Cycling Without Age scheme provides those in Peebles with the all-important opportunity to socialise intergenerationally and enjoy their surrounding environment.



<p>5 SPORT, RECREATION &amp; WELL-BEING</p>  <p>SOS</p>	<p>A FAIRER &amp; MORE EQUAL SOCIETY</p>  <p>NSET</p>	<p>THRIVING &amp; DISTINCT COMMUNITIES</p>  <p>RES</p>	<p>3 GOOD HEALTH AND WELL-BEING</p>  <p>UN</p>
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Cycling Without Age Peebles is making a difference in local community. Credit – Cycling Without Age Peebles



# Case Study 1 - Cycling Without Age Peebles

With one trishaw, plus one on loan, and a wheelchair bike available, the team in Peebles look to get out two or three days a week with four to six seniors per session, thanks to their 10 volunteer pilots.

Seniors come from all walks of life and may be from local nursing homes, supported accommodation, the local hospital, or still living independently.

The team look to recruit additional pilots once a year so that they can continue to provide their services to as many people as possible.

Jo Cunliffe from Cycling Without Age Peebles said: "With the help of our incredible volunteer pilots, we like to take groups of people out together, if possible, to increase the opportunity for socialising.

"The passengers and their families are so keen and happy to see us back out after COVID-19. They love the fresh air and the opportunity for a chat and to have fun.

"Our goal is to get a paid coordinator position funded to enable us to take the project to the next level."



Lyle Williamson and Jo Cunliffe of Cycling Without Age Peebles

<b>5</b> SPORT, RECREATION & WELL-BEING  SOS	<b>A FAIRER &amp; MORE EQUAL SOCIETY</b>  NSET	<b>THRIVING &amp; DISTINCT COMMUNITIES</b>  RES	<b>3</b> GOOD HEALTH AND WELL-BEING  UN
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## Case Study 2 - G&G Cycle Centre

Based in Dumfries town centre, G&G Cycle Centre is the South of Scotland's oldest running independent bike shop, having been established in 1911.

As well as providing a valuable local resource to customers to ensure they get the most out of their bike, G&G has long displayed their commitment to operating within a circular economy model.

This commitment is best evidenced by their Grow with G&G trade-in scheme.

Under the offering, any children's bikes purchased from the shop can be traded back when a child outgrows it and moves on to the next size new bike from the shop.

The scheme helps to ensure a reduction in bikes which would otherwise sit in a garage or be scrapped, with staff servicing the bikes which are traded in and, where suitable, reselling as recycled.

Grow with G&G sees two-fold success as alongside giving new life to the bike itself, resale of the traded models allows them to provide further enjoyment to more children and families.

John McLintock of G&G Cycle Centre said: "Bikes offer a perfect example of the circular economy.

"Bikes are often used for decades, and when finished a lot of the parts are repairable or recycled.

"We have even seen new items made from old bike parts - artworks and other projects."



<b>4</b> SUSTAINABLE ECONOMY & COMMUNITIES SOS 	PRODUCTIVE BUSINESSES & REGIONS NSET 	REWARDING & FAIR WORK AND INNOVATIVE & ENTERPRISING RES 	<b>8</b> DECENT WORK AND ECONOMIC GROWTH UN 
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G&G Centre has been operating in Dumfries and Galloway for over 110 years. Credit - G&G Centre

# Case Study 3 - Hawick Flood Scheme - Active Travel Network

The Hawick Flood Protection Scheme is one of the largest and most significant flood defence projects ever carried out in Scotland.

It will deliver protection from a one in 75 flood event to over 900 residential and commercial properties at risk along the River Teviot and Slitrig Water, both of which have flooded and caused significant damage in recent years.

Alongside the creation of flood defences, an opportunity was identified to create an active travel network.

As part of these plans, traffic-free routes around key locations throughout the Scottish Borders town will be designed as a way of promoting active travel that can be accessed by everyone.

These routes will encourage people to swap their cars and walk, wheel or cycle for their everyday journeys around the town.

The active travel network will be over 6km in length and is being supported by over £12million worth of funding from Sustrans.



<b>6</b> INFRASTRUCTURE SOS 	<b>NEW MARKET OPPORTUNITIES</b> NSET 	<b>THRIVING &amp; DISTINCT COMMUNITIES</b> RES 	<b>9</b> INDUSTRY, INNOVATION AND INFRASTRUCTURE UN 
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Artist impression of the Hawick active travel network at Little Haugh. Credit - Hawick Flood Protection Scheme/SBC

## Case Study 3 - Hawick Flood Protection Scheme's active travel network (Cont'd)

The active travel network was progressed with the community through working groups led by the Flood Protection Scheme, helping to ensure it is designed with local people in mind.

Once completed, the infrastructure will have a positive impact on physical and mental wellbeing of the local community, as well as providing environmental benefits.

Conor Price, Project Director of Hawick Flood Protection Scheme said: "The COVID-19 pandemic brought about a significant upsurge in the amount of active travel across our towns and villages.

"We want to encourage this trend to continue to promote healthier lifestyles and make it easier and safer for people to walk, cycle and wheel for every day journeys.

"When completed as part of the Flood Protection Scheme, the active travel network will represent a major enhancement to the facilities and infrastructure of Hawick."



The installation of Victoria Footbridge as part of the Hawick active travel network will allow cyclists and pedestrians to share safely. Credit - Hawick Flood Protection Scheme/SBC

## Case Study 4 - Tweed Valley

The selection of Glentress Forest as a host for the 2023 UCI Cycling World Championships is a landmark moment for cycling in the South of Scotland.

It is the result of sustained investment in facilities and recreational infrastructure which has been instrumental in developing the Tweed Valley's status as one of Scotland's top cycling destinations, and attracting riders from all over the world.

Hosting the UCI World Championships in 2023 will provide the perfect opportunity for Forestry and Land Scotland to launch its new Glentress layout, which includes a new skills area, new trails and trail features.

These works, part of the Glentress Masterplan, will further enhance the recreation offer at the venue and its 45 miles of mountain bike

trails. Delivering multiple benefits for visitors, businesses and the local community, the Masterplan improvements will also build on the venue's international reputation for mountain biking and as an attractive location for event organisers.

John Dougan of Forestry and Land Scotland added: "The 2023 events will mark the beginning of a new exciting chapter for Glentress, hopefully hosting many more top flight events in the future."

Another important Tweed Valley investment has been the extension of the multi-use path from Innerleithen to Walkerburn, thanks to funding from Transport Scotland, Scottish Borders Council and Sustrans Scotland's Places for Everyone programme.



<b>3</b> EVENTS  SOS	NEW MARKET OPPORTUNITIES  NSET	THRIVING & DISTINCT COMMUNITIES  RES	<b>11</b> SUSTAINABLE CITIES AND COMMUNITIES UN 
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A mountain biker at Glentress. Credit - VisitScotland/Kenny Lam

## Case Study 4 - Tweed Valley (Cont'd)

Emma Guy, of the Enduro Sports Organisation based at Innerleithen, commented: “The multi-use path has sparked initiatives such as Walkerburn Community Development Trust’s e-bike community library.

“It has also increased visitors using the path to enjoy and stay in the area and contributed to the well-being of the local communities.

“The path has also been used to connect Enduro race stages, with athletes utilising the path to move between venues and for race organisers to easily engage local communities as host locations for events.”

One of the prime events to emerge in the Tweed Valley is TweedLove, a series of hugely popular cycling events celebrating all things bike, which are 100% organised by bike riders.

TweedLove Founder Neil Dalgleish believes the Tweed Valley has the potential to develop further as a world-class cycling destination.

Neil said: “We have amazing scenery, world class mountain bike trails, beautiful hill tracks and fantastic road cycling here – but it is still largely undiscovered by the cycling world.

“We need to be proud of these assets and really let the world know what we have to offer.”



Cyclists during Tweed Love. Credit - Visit Scotland and Ian Rutherford

# Case Study 5 - Galloway Cycling Holidays

After taking on an incredible cycle around the world over four years, couple Esther Tacke and Warren Sanders decided to settle in Galloway, bringing to the area all their experience and passion for cycling.

The couple set up Galloway Cycling Holidays in 2017 and since then their work has provided positive economic, environmental and social impact on the region for visitors and the local community.

Faced with the obstacles and impacts of COVID-19, they have diversified the original business structure to offer a cycling holiday experience, chasing their vision to make Galloway a prime destination for cycling and the outdoors.

The couple have become proud supporters of the Galloway and Southern Ayrshire Biosphere and were awarded the Certificate Mark in 2019 - recognition of high-quality standards in delivering environmental and sustainable development that benefits the biosphere.

As well as road-cycling, a new type of discipline named 'Gravel Cycling' - which covers various types of terrain - is becoming more popular. This type of cycling is open to all abilities and ages in the 300 square miles of Galloway forestry.

Esther and Warren also supported the creation of the new Raiders Gravel event, a four-day gravel adventure festival which takes riders deep into the wilderness of the Galloway Forest Park. The festival has a strong emphasis on sustainability and protecting, conserving and promoting the natural surroundings.

Esther added: "The South of Scotland has a massive potential to be a cycling destination, not just for mountain biking, but for leisure, gravel and road.

"We have a playground that is unique on the national and international market, and we can harness that if we invest into it - not just one aspect of cycling, but the whole spectrum of it."



<b>5</b> SPORT, RECREATION & WELL-BEING SOS	<b>NEW MARKET OPPORTUNITIES</b> NSET	<b>GREEN &amp; SUSTAINABLE ECONOMY</b> RES	<b>11</b> SUSTAINABLE CITIES AND COMMUNITIES UN
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Esther Tacke cycling in Dumfries and Galloway. Credit - Galloway Cycling Holidays



## Case Study 6 - Rocks and Wheels (RAW)

Rocks and Wheels (RAW) is a community project which aims to create an activity centre bringing Dalbeattie's former primary school back to life and bringing a host of associated benefits to the local area.

The project, managed by Dalbeattie Community Initiative (DCI), aims to offer an extensive list of activities for all the community, with cycling being one of the core activities.

The centre will provide an opportunity for people to improve their health and wellbeing by offering various activities focusing on personal wellbeing, reducing social isolation and strengthen the local spirit.

On the doorstep of the world renowned 7stanes mountain biking trail, the centre's facilities will include an outdoor pump track alongside:

- 60-bed hostel
- Indoor bouldering centre
- Lockers and changing facilities
- Drying rooms
- Storage and maintenance areas
- Indoor and outdoor café
- Designated office and management space
- Community/small business/training rooms
- Exhibition space and outdoor civic/event area with amphitheatre.



2 SUSTAINABLE



SOS

PRODUCTIVE BUSINESS  
& REGIONS



NSET

INNOVATIVE &  
ENTERPRISING AND  
CULTURE & CREATIVE  
EXCELLENCE



RES

11 SUSTAINABLE CITIES  
AND COMMUNITIES

UN



## Case Study 6 - Rocks and Wheels (RAW) (Cont'd)

Activities on offer will include road cycling, mountain biking, running, walking, orienteering, climbing, golf and sailing.

The centre will aim to cater for individuals, couples, families, small groups, uniform organisations and school parties.

The RAW project will aim to ensure the longevity of tourism in the area as well as future proof the development of sustainable and improved infrastructure in the town.

The vision is to establish a facility which will provide a different offering for Dumfries and Galloway.

Maria Rawlings of RAW added: "This centre will aim to contribute significantly to the economic, physical, and social health of Dalbeattie and the wider area.

"The project will make use the surrounding landscape, and both complement and enhance existing facilities with the objective of encouraging a healthy and active lifestyle for all ages, leading to improvement in the physical and mental health and wellbeing of all that use it."



The primary school in Dalbeattie which Rocks and Wheels will develop into an activity centre. Credit - RAW



# SECTION 3 - Cycling Partnership Themes & Priorities

## Infrastructure

10 Year Cycling Infrastructure Plan including E-Bike provision  
 CivTech Challenge – Technology Opportunity  
 Measure all investments against:  
 Cycling as Transport, Major Events, Sport, Industry, Tourism & Participation

## Sport, Recreation & Wellbeing

Next Gen Sporting hero's from South  
 Decrease of serious diseases diagnosed  
 Exercise by bike incorporated into daily lives  
 Happiness Indicators Increased  
 Competitor Diversity & Inclusion Increased

## Sustainable Economy & Communities

Cycling is inclusive and access to bikes is available to all.  
 Increase Diversity of Skills  
 Facilitate New Economic Opportunities  
 Investments for Tourism, Events & Support Fragile Communities  
 Quality of Life Improvements  
 Appreciation of Place

## Innovation and Technology

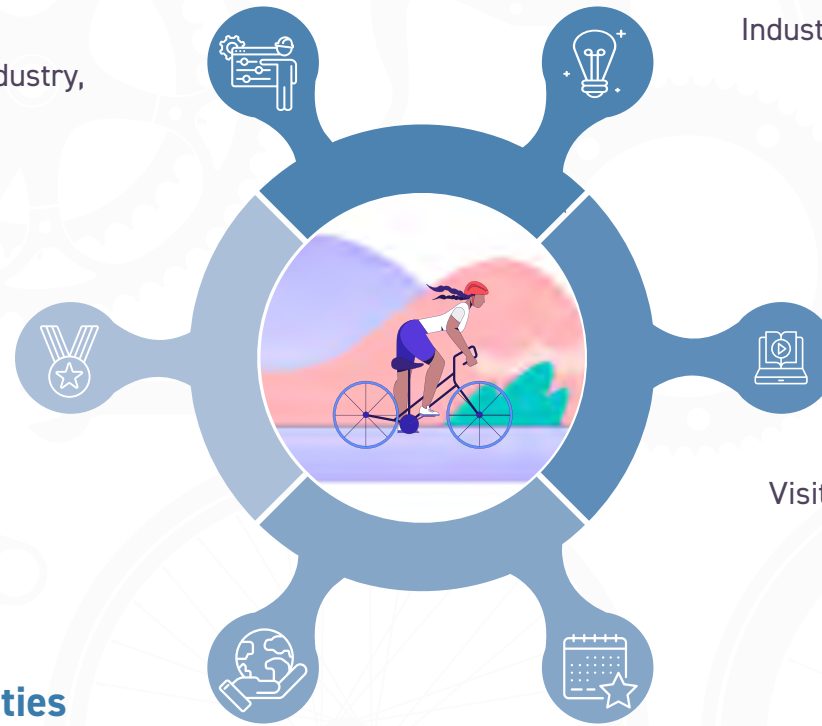
Mountain Biking Innovation Centre & Bike Park (National R&D Cycling Centre of Excellence)  
 Product Development Pipeline  
 Industry Investment – existing supply chain & inward Thriving Clusters  
 Stimulate Start-Ups & Scale-Ups

## Destination Development & Promotion

Bookable Product Development  
 Cycle Friendly Destination Accreditation  
 Consumer Brand Recall  
 Visitor Dispersal using bikes for unique adventures  
 High Performing ROI in Campaign Activity

## Events

Host destination of choice – UK, Ireland & Int'l community  
 Catalyst for Behavioral change through participation  
 Supply Chain Build  
 Community & Economic Impacts (Long Term Legacy)  
 Reputational & Happiness Impacts  
 All events staged in the region are fully inclusive



# Cycling Partnership Themes & Priorities – Detailed Overview

- **Innovation and Technology:** We will strengthen the region's role as a hub for cycling industry research, product development and stimulate growth in the existing business supply chain, propel business start-ups and attract new investment. We will offer innovation and business development support services to secure the performance of the cycling and outdoor adventure sector; developing a local supply chain and thriving industry clusters; stimulating business launches and scale-ups.



- **Destination Development & Promotion:** We will invest in the visitor economy infrastructure to support the growth ambitions of the region's tourism sector. Our campaign strategy will cement our reputation as one of Europe's leading mountain biking destinations and grow the profile of our road cycling, gravel and enduro credentials. We will be known as a brilliant cycling holiday destination where adventures are safe, accessible, memorable and offer a unique way to experience our natural playground, culture and communities.



# Cycling Partnership Themes & Priorities – Detailed Overview (Cont'd)

- **Events:** We will collectively identify and secure cycling events that will inspire people to ride bikes and act as a catalyst for change. Our region-wide events strategy will continue to build on our credible and established relationships within the professional cycling community but importantly will also offer assistance, support and framework information to grassroots community cycling event organizations to create a year-round program of events both on and off the bike that have a positive impact on participation, reputation, visitor dispersal and legacy impacts from staging major events.



- **Sustainable Economy & Communities:** By collectively prioritizing our transition to net zero we will harness the power of the bike to create new economic opportunities by unlocking the full potential of our natural resources to further improve our quality of life, attract and retain people with a diversity of skills, activate networks, provide a world-class level of service, develop new products & further develop our visitor offer. The successful implementation of the delivery plan will also enhance each rural communities appreciation of place.

# Cycling Partnership Themes & Priorities – Detailed Overview (Cont'd)

- **Sport, Recreation & Wellbeing:** We will use a strategic partnership approach between Local Authorities, Live Borders, Scottish Cycling and national agencies to deliver a range of critically important initiatives that supports efficient programme delivery, is inclusive and offers a well-defined rider pathway which allows progression from novice through to elite rider.

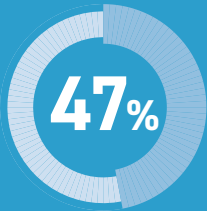
Improved Health & Wellbeing will be a key outcome from the implementation of the strategy. Cycling is an enjoyable and uncomplicated way to incorporate exercise into daily routines and the benefits can be wide reaching including offering protection from serious diseases.



- **Infrastructure:** We have watershed opportunities to create an infrastructure plan which supports 6 key ambitions to use the power of the bike as a catalyst for change. We will ensure that all investments can be evaluated against the following questions of “Does this investment support; Cycling as Transport, Major Cycling Events, Cycle Sport, Cycling Industry, Cycling Tourism, Cycling Participation”



# SECTION 4 – Our Opportunity



47% rise in people cycling during the pandemic



45% rise in bikes, parts and accessories in UK in 2020



2020



EU & UK towns, cities & regions accelerate infrastructure



EU & UK market worth €18.3 billion



22 million bikes & e-bikes sold in 2020



1000 bikes built in UK = 3 to 5 skilled jobs



1000 e-bikes built in UK = 6 to 9 skilled jobs



61% of travellers want to travel more sustainably

193,000 road Cycling Trips on Holiday



166,000 Mountain Biking Trips on Holiday



20.4 million cycle tourists in EU, spend £9 billion annually



24% of children travel to school by car



£90 million Target to secure 1% of EU total market could deliver £90m for local economy



£158 million Mountain Biking contributed £105m in 2015, set to grow to £158m in 2025

177,000

up to 177,000 of our residents want to include cycling more in their daily lives



## SECTION 4 – Our Opportunity (Cont'd)

Just over 200 years ago a humble blacksmith from Dumfriesshire, Kirkpatrick Macmillan, went into his workshop and created the “velocipede” which went on to become known as the bicycle and changed the world forever. His time-less Victorian-era design still to this day inspires the basic configuration of the bicycle as does its ability to unlock economic, environmental and community power at a time when the world is looking for answers on how we can live more sustainably and equitably with each other and our planet. South of Scotland is widely recognised as a region with jaw dropping scenery, world-class mountain biking, gravel and road routes which makes our claim to have some of the best riding in the UK & Europe entirely true. We are being presented with a series of “once in a generation” opportunities and we must seize them if we are to harness them to drive the next industrial “Green Revolution.

The global COVID-19 pandemic brought hardship to millions of global citizens, however, it also led to an unprecedented cycling surge as UK residents rediscovered the bicycle as a safe, convenient, and reliable means of transport. In the first year of Covid-19 restrictions being first introduced in Scotland, new data showed a 47% rise in people cycling from 23 March 2020 to 22 March 2021. Figures from the Bicycle Association show sales of bikes, bike parts, accessories and services increased by 45 per cent across the UK in 2020, with the trend set to continue. Promotion of cycling as a mobility solution, during the pandemic and beyond, either accelerated existing plans in cities, regions and countries across UK & Europe or new entrants introduced cycle-friendly measures for the first time. Communities that offer good and accessible walking and cycling links are seen as attractive and desirable places in which to live, work and visit. Where safe and accessible cycling links are available kids will ride bikes to school, residents and visitors will have easy & quick access to centres of commerce and the sense of place is built into the fabric of their daily experiences.





## SECTION 4 – Our Opportunity (Cont'd)

CONEBI the Confederation of the European Bicycle, E-Bike, Parts & Accessories Industries, has recently released its much-anticipated 2021 European Bicycle Industry and Market Profile Report. Latest data reveals that sales increased by 40% to a 20-year high of EUR 18.3 billion or 22 million units sold (bikes & e-bikes) across the EU twenty-seven and UK during 2020. A growing number of companies reinforcing their EU/UK investments by reshoring production to the EU/UK could drive an increase in skilled jobs. Latest figures confirm for each 1,000 bicycles re-shored/produced each year in Europe & UK, creates three to five skilled jobs. And, for each 1,000 E-Bikes that are re-shored/produced in the region each year, between six and nine skilled jobs are generated.

South of Scotland offers a vast range of cycling opportunities from long distance routes, day trips and miles of dedicated and well-maintained mountain biking trails, specialist centres, alongside wilder and historic common and drove routes for experienced riders. VisitScotland have used several sources to gather background information and identified that according to GBTS (GB Travel Survey 2019) - GB overnight visitors took 290,000 trips where adventure sports was part of a trip contributing £112 million to the economy. Road cycling as part of a holiday equated to 193k trips and mountain biking 166k trips.

Globally, adventure tourism is valued at \$445bn with the potential to grow to \$1,335bn by 2031. VisitScotland identifies it as a market with significant growth potential. According to Developing Mountain Biking in Scotland national strategy, mountain biking contributed £105m in 2015. With the right strategic investment and support this could rise to £158m by 2025.



## SECTION 4 – Our Opportunity (Cont'd)

According to data from EuroVelo and the European Parliament EU Cycling Economy (2016) study there are an estimated 2.3 billion cycle tourism trips in Europe every year with a value of more than €44 billion. 20.4 million cycle tourists stay one or more nights en route, and these 'overnight' tourists spend around €9 billion annually. If we could pick up even an additional 1% market share from our EU feeder markets for those overnight stays, we could potentially secure up to £90m of additional economic benefit for our region.

In the 2019 Infrastructure Commission for Scotland's Future Requirements, it was widely recognised by a range of national agencies, that what is good for local communities is highly likely to be good for visitors. It was stated that infrastructure investment benefits all people, whether settled in, or visiting a destination. It's essential to recognise that active travel can enhance the viability of rural areas and be a key attractor of talent and businesses which can drive economic opportunities and sustainable inclusive growth for fragile rural communities.

In March 2022, an evidence paper was published by Public Health and Sustainable Transport Partnership Group tested the theory that the reallocation of road space away from motor traffic to active travel infrastructure can contribute to improved health. The published paper found that reallocating space to provide active travel infrastructure can increase physical activities such as walking, wheeling and cycling and informal social connections" and "that road space reallocation can contribute to multiple positive outcomes, support the sustainable travel hierarchy, and help create better quality of place for local communities. However, other actions are needed to maximise these benefits, ensure impacts are equitable and support alternative modes of travel.



## Section 4 – Our Opportunity (Cont'd)

The paper also showed that 24% of children currently travel to school by car. Many of these journeys could be made by cycling and would establish healthy behaviours when children are young and would continue into later life. Importantly the paper also found that “Although businesses are often concerned about loss of customers through reduction in parking, research suggests the opposite: that reallocation of road space can increase trade through increased footfall from pedestrians and cyclists”.

In April 2021 Jump Research on behalf of Sustrans carried out consumer research which identified that only 33% of the population were not interested in cycling either within their daily lives or within their leisure time. If we were to apply this percentile finding to our region it would mean that approximately 177,000 residents in the South of Scotland would like to include cycling more in their lives.





# SECTION 5 – Where Are We Now?

## CATALYST OPPORTUNITIES SUPPORTED BY PARTNERS





## SECTION 5 – Where Are We Now? (Cont'd)

South of Scotland is Scotland's strongest performing region in unlocking the "power of the bike"

In pockets across the South of Scotland we have successfully harnessed the opportunities connected to the power of the bike and leveraged it to increase cycle tourism, increase community grass roots sports development by embedding bikes into our daily culture, and by hosting cycling events we have offered participation opportunities to our communities for the last 20 years, however, there is much more to be gained by our efforts hence the development of a South of Scotland Cycling Partnership Strategy being prioritised as a key action within the Regional Economic Strategy.

We have the advantage of extensive formal and informal stakeholder networks which provides connections to cycling in all its forms for the enjoyment and pleasure of both our residents and our visitors. The South of Scotland already has a significant USP in relation to road cycling, mountain biking and going forward gravel. We have been given a mandate through our Regional Economic Partnership to develop a South of Scotland Cycling Partnership Strategy and Delivery Plan which will capitalise on our strengths and develop our offering further to claim our place as "Scotland's Leading Cycling Destination" and cement our global reputation as a world-class "Cycling Destination of Excellence"

The 7stanes are world-class mountain biking centres that span South of Scotland. Our award-winning trails offer some of the best mountain biking in the Europe and attract riders from across the UK, EU and beyond. Dumfries & Galloway is home to 5 of the 7stanes. We must continue to support the growth and development of mountain biking; it can deliver a range of outcomes linked to skills, innovation & technology and can be leveraged to support investment in local communities. In the next 3 years Dumfries & Galloway will enjoy a refresh of 7stanes with anticipated £4m initial investment from the Borderlands Inclusive Growth Deal.



## SECTION 5 – Where Are We Now? (Cont'd)

Through community groups there are proposals to develop pump tracks in Moffat & Stranraer and a broader community asset transformation project in Dalbeattie. Dalbeattie Community Initiative is leading on the adaptation of the former primary school building to provide a state-of-the-art hub which will act as a base for road, gravel and mountain bikers as well as other adventure pursuit enthusiasts. The core facilities will include a pump track, climbing wall and boulder trail and affordable self-catering accommodation which can take up to 60 guests from a range of market segments. This project will be an important step in the regeneration of the town and will be a critically important example of how to unlock the power of the bike for our communities.

Along with these infrastructure proposals, Kirroughtree, located in Dumfries & Galloway, will for the first time in 2022 host the British Cycling MTB Cross Country (XC) Championships and other high profile gravel events, and regional series in all MTB disciplines. Dumfries & Galloway is known as a 'sleeping giant' in the world of mountain biking. It has great potential to support the UK Shared Prosperity and Levelling Up agenda and would benefit greatly from focused support to develop industry clusters, link to national and regional networks and expand its grassroots sports development footprint.

Tweed Valley plays a critical role in profiling our region. The destination is named as one of Scotland's premier destinations in the Scottish Mountain Bike Strategy 2019-2025, and is home to the internationally acclaimed Glentress & Innerleithan 7stanes trail centres. "The Valley" also boasts an award-winning trails association,



## SECTION 5 – Where Are We Now? (Cont'd)

Tweed Valley Trails Association, who help manage trails, particularly at the 'Golfie' forest in Innerleithen. Combined these trails and facilities attract over 400,000 visits each year from a range of users from first time cyclists through to elite athletes.

Innerleithen will soon boast Scotland's National Mountain Bike Innovation Centre & Bike Park Trail Lab and become the Head Quarters of Developing Mountain Biking in Scotland, part of Scottish Cycling. This investment will deliver on the ambition of Tweed Valley becoming the Mountain Bike Capital of Europe. The Mountain Bike (MTB) Project will deliver a 10-year capital and revenue investment totalling £89.8m. The project sets itself apart on the world stage by being not just the world's first Mountain Bike Innovation Centre, but the very first MTB industry facility to integrate with a purpose-built bike park and trail lab. The innovation centre will champion entrepreneurs, support thriving industry clusters and bolster the research and development community helping to unlock investment and build capacity. This investment is expected to be pivotal in our ability to foster relocation, attract talent, deliver the skills required for the next generation of innovators and deliver transformational inward investment.

Exciting new opportunities also exist for the visibility and profile of our region through the recent developments at ESO Sports. Based in Innerleithen, ESO Sports are specialists in major global mountain bike races and festivals. Formed in 2012, the organisation owns and operates the Enduro World Series (EWS), which now includes a network of over 80 events in 35 countries. EWS is sanctioned by the Union Cycliste Internationale (UCI) including EWS-E, the first UCI sanctioned international E-mountain bike enduro series. In 2021, ESO Sports acquired the Scottish Enduro Series (SES) to enhance grassroots development and mtb destination legacy across Scotland. From 2023, ESO Sports will lead mountain biking within the Warner Bros. Discovery group (who invested in the Tweed Valley company in 2021), delivering the organisation, media production and broadcast, promotion and commercialisation of the UCI Mountain Bike World Cups across the world.



## SECTION 5 – Where Are We Now? (Cont'd)



Supporting the demand for a skilled workforce to meet the growing needs of the local industry is the pioneering Borders Academy for Sporting Excellence (BASE) Mountain Biking course which is a performance-based, three-year full-time academic program based in Scottish Borders College Galashiels Campus and the Tweed Valley & is delivered by Dirt School.

The local business community, through support from a range of partners, have significantly developed their product and marketing towards attracting more mountain bike visitors and many are excelling at delivering high quality visitor experiences across the Tweed Valley & wider Scottish Borders. Partners across the cycling landscape both at a national and regional level also have long term commitments and ambitions cement the visibility and global reputation of the destination by international scale cycling events including Enduro World Series, Tweed Love, Tour of Britain, Tour Series, The Women's Tour and the forthcoming 2023 UCI World Cycling Championships.

As part of the Borderlands Deal Heads of Terms a £5million capital investment commitment has also been made to 7stanes Mountain Biking Trail Centres. Adventure sport and tourism continues to develop through UK competitor locations and in recent years we have seen 7stanes visitor numbers stagnate, although they have not declined significantly they also have not tracked the growth we would like. All 7stanes locations are noted as nationally important in the Strategy for Scottish Mountain Biking 2019 – 2025 and like other



## SECTION 5 – Where Are We Now? (Cont'd)

provision across Scotland, are facing increasing competition from across the rest of the UK and Europe following a raft of landmark investments. FLS (Forestry and Land Scotland) are leading on the development of a Full Outline Business Case to secure the funding which will create new & enhanced facilities to grow demand with a particular focus on locations in Dumfries & Galloway.

The Borderlands Growth deal also presents additional opportunities which could have a large-scale impact on cycling both a mode of transport and visitor distribution. Destination Tweed project will create a unique and truly world class visitor experience using the River Tweed as a catalyst to take an incredible journey from the source in Moffat to the sea in Berwick-Upon-Tweed. The project aims to build a clear identity whilst conserving, connecting, and promoting multiple attractions and communities to deliver transformational economic benefit and become known as one of the great long-distance trails in the UK which can be experienced by walking or cycling.

It is critically important to highlight the significant commitment made by Scottish Government to put active travel at the heart of their transport policy. A range of actions have been committed to at a national level and the Cycling Walking and Safer Routes budget which goes directly to local authorities has been increased from £24 million to £35 million for 2022/23 and they have committed to investing at least £320 million or 10% of the transport budget for active travel by 2024/25; it is worth noting that £10.6m has also been earmarked for the development of the National Cycle Network. One challenge with this funding is that it's been offered within a competitive framework as opposed to being based on a settlement allocation for the local authorities. Some partners feel that if this was approached differently this could be transformational for the region to forward plan infrastructure investment in active path networks in a strategic and targeted manner.

NB: baseline data review required. This will need to be gathered from all partners on the SOS Cycling Group to allow us to monitor progress against the plan.



## SECTION 5 – Where Are We Now? (Cont'd)

Scottish Borders Council, Live Borders & Dumfries & Galloway Council are responsible for delivering our critically important Active Schools, Sports Development, Health Development and Active Travel program. These programmes offer those first grassroots experiences of cycling and are delivered through a range of initiatives to ensure diversity and inclusion are at the heart of the aims and objectives. The delivery programmes include Bikeability Scotland, Play on Pedals, Disability Cycling, and move into Advanced Rider Development Centers. ClubSport Borders allows clubs and individuals to be supported with welfare courses, child protection accreditation and grants. Our cycling partnership also works collaboratively with Scottish Cycling to deliver the national strategy through regional actions giving local benefits. South of Scotland Cycling Partnership will actively engage with the steps outlined in the 2019-2025 strategy “Developing a Nation of Cyclists” to ensure regional actions are committed to and offer detailed ways in which we can support the four strategic themes of LEAD, GROW, SUPPORT & PARTNER.

Scotland’s reputation as the “Perfect Stage” for events is recognised across the world and South of Scotland has always been a key region upon which the national strategy has been played out. Our cycling events portfolio consists of a core of events which are unique to the south and are embedded in our culture. We have built strategic partnerships with important governing bodies and race designers such as UCI, Tour of Britain, Tour Series, Enduro World Series and more recently Galazo Cycling to ensure the destination continues to be a compelling as a host destination of choice for some of the biggest and



## SECTION 5 – Where Are We Now? (Cont'd)

globally visible events. We can see in real time the benefits playing host to major cycling events has on the rest of the community in Dumfries & Galloway and the Scottish Borders by the proliferation of regional events which have a UK demographic mix who travel to our territory to take part including but not limited to Tour' O the Borders, Tweedlove, Tour De Lauder, Dalbeattie Hard Rock Challenge, Muck n' Mac Fest, Galloway ReCycle Sportive, Glentress 7, the Galloway Hillbillies Duathlon. Ken Laidlaw Sportive and Ride for Dottie.

(\*please note this is not an exhaustive list and there will be more not identified here but promoted via British Cycling membership base)

A key opportunity linked to our status as a host destination for the 2023 UCI Cycling World Championships is the opportunity to create a permanent event venue which has all of the necessary services – water, power, digital capability, hardstanding environment for team buses and 5G connectivity. This would offer an affordable and world-class environment to from which to bid for and secure a pipeline of international grade events.

Sustaining and building on what has already been achieved in the South of Scotland is critically important to us. By taking a strategic partnership approach we will reach our ambition of being Scotland's leading cycling destination and recognised as a world-class cycling destination of excellence. Infrastructure investment is always a catalyst for change. We have seen this to be true across strategic infrastructure projects in Scotland and the wider UK.





## SECTION 6 – Getting it Done

The cycling ambitions of the region are rooted in six key themes with linked priorities. This approach has enabled the partnership to include existing commitments and future ambitions linking initiatives, projects, and programs in an organised manner. Focus, prioritisation and at times additional resource may be required to deliver all the actions outlined in the accompanying delivery plan.

From the outset, it is recognised that the South of Scotland has a significant USP in relation to cycling and the partnership is encouraged that many of the right things are already happening. The focus of the delivery plan will be to track actions that are being taken by individual organisations but more importantly to focus on where we can go further through collaboration to address the gaps which will hold us back from our overall ambition of being recognised as Scotland's Leading Cycling Destination and a world-class cycling destination of excellence.

The success of our delivery plan will rely on strong and clear championing of our regional opportunities and how they link to and support the national policy objectives.

We must be truly collaborative and relentlessly pursue opportunities to work together to serve our residents and visitors, tackle challenges head on where our organisations have it within their power to control the outcomes and build strategic evidence-based arguments where we do not.

The scale of the opportunity in front of us is timebound, we may never again have the chance to be a host destination for the 2023 UCI Cycling World Championships where the profile of cycling will be at a global high and can inspire the next generation of athletes, get thousands of our residents onto bikes using active travel networks and build the right infrastructure to secure our future as a host destination of choice for international events and visitors.

For each of the actions identified within the delivery plan, we identify the lead partners, but it should be noted that this is not intended to be a closed list – we recognise that others will come on board to assist delivery as actions gather momentum or need further enablement.

A timescale for completion of each action is also set out, either as:

Short term (before April 2023)

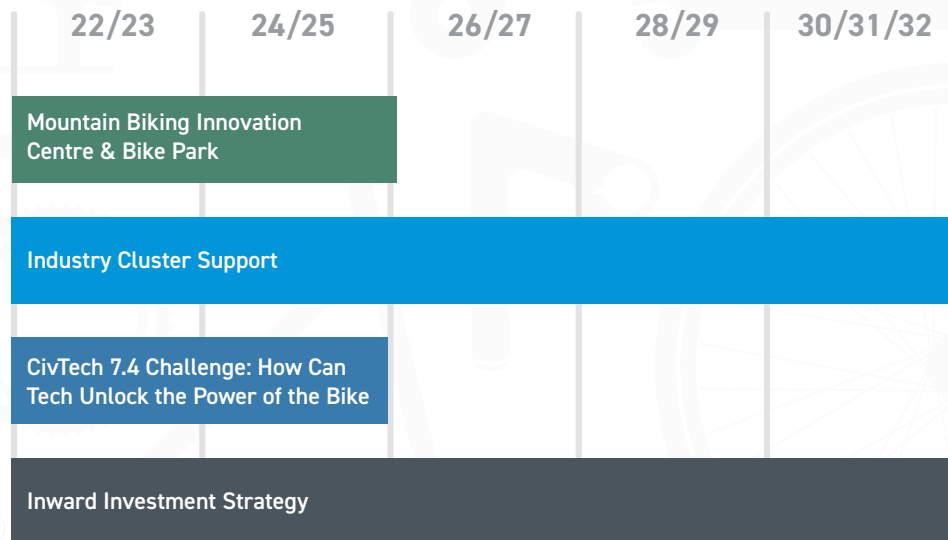
Medium term (before April 2026)

Long term (before April 2026+ up until March 2032)

# SECTION 6 – Getting it Done (Cont'd)

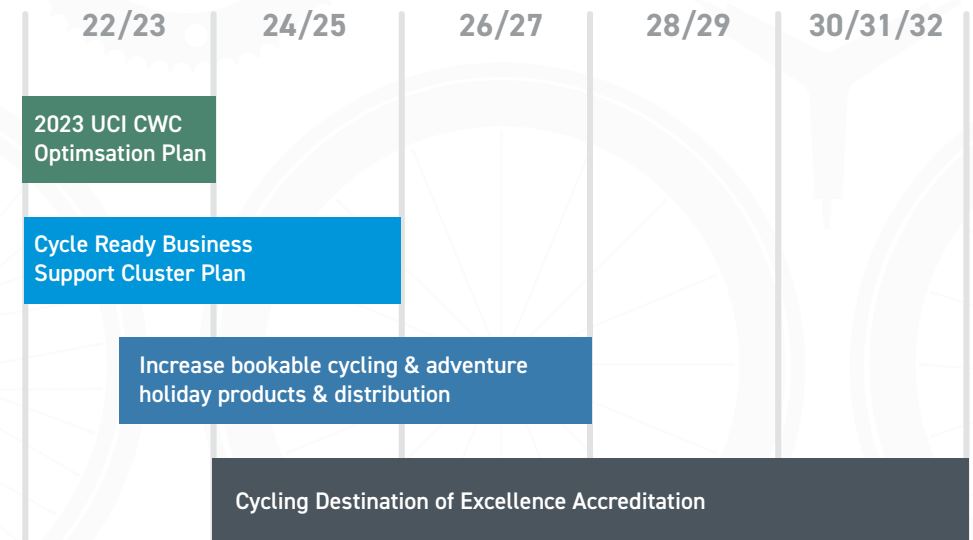
## Theme 1: Innovation & Technology:

We will strengthen the region's role as a hub for cycling industry research, product development and stimulate growth in the existing business supply chain, propel business start-ups and attract new investment. We will offer innovation and business development support services to secure the performance of the cycling and outdoor adventure sector; developing a local supply chain and thriving industry clusters; stimulating business launches and scale-ups.



## Theme 2: Destination Development & Promotion

Destination Development & Promotion: We will invest in the visitor economy infrastructure to support the growth ambitions of the region's tourism sector. Our campaign strategy will cement our reputation as one of Europe's leading mountain biking destinations and grow the profile of our road cycling, gravel and enduro credentials. We will be known as a brilliant cycling holiday destination where adventures are safe, accessible, memorable and offer a unique way to experience our natural playground, culture, and communities.



# SECTION 6 – Getting it Done (Cont'd)

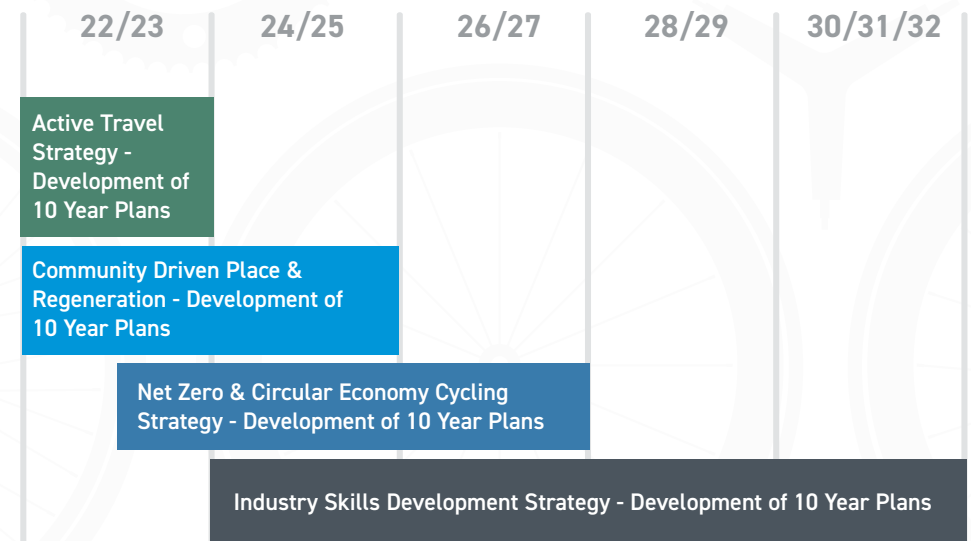
## Theme 3: Event Strategy

Events: We will collectively identify and secure cycling events that will inspire people to ride bikes and act as a catalyst for change. Our region-wide events strategy will continue to build on our credible and established relationships within the professional cycling community but importantly will also help, support, and deliver a framework of information to grassroots community cycling event organizations to create a year-round program of events both on and off the bike that have a positive impact on participation, reputation, visitor dispersal and legacy impacts from staging major events.



## Theme 4: Sustainable Economy & Communities

Green Sustainable Economy & Communities: By collectively prioritizing our transition to net zero we will harness the power of the bike to create new economic opportunities by unlocking the full potential of our natural resources to further improve our quality of life, attract and retain people with a diversity of skills, activate networks, provide a world-class level of service, develop new products & further develop our visitor offer.



# SECTION 6 – Getting it Done (Cont'd)

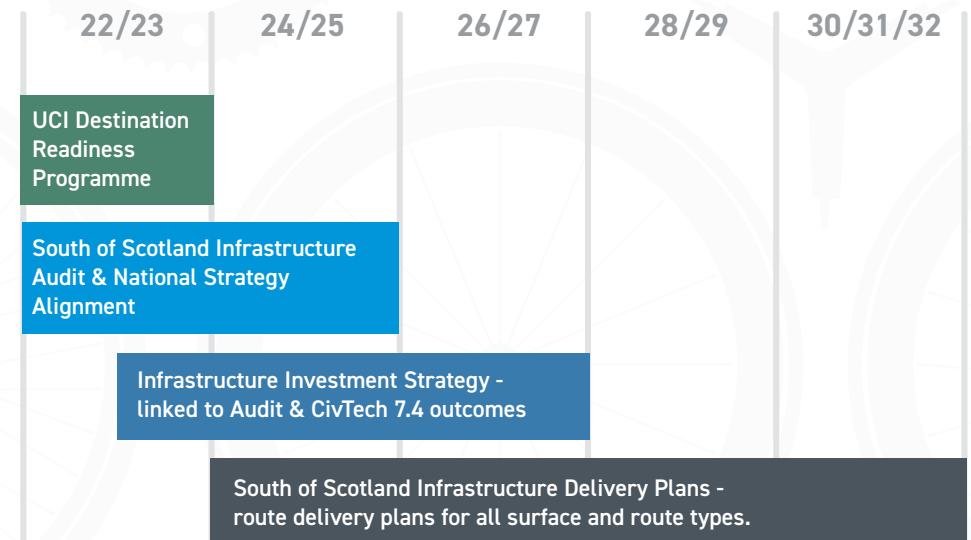
## Theme 5: Sport, Recreation & Wellbeing

We will use a strategic partnership approach between Local Authorities, Live Borders, Scottish Cycling and national agencies to deliver a range of critically important initiatives that is inclusive and offers a well-defined rider pathway which allows progression from novice through to elite rider. Improved Health & Wellbeing will be a key outcome from the implementation of the strategy. Cycling is an enjoyable and uncomplicated way to incorporate exercise into daily routines with the benefits being wide reaching including protection from serious diseases.



## Theme 6: Infrastructure

Infrastructure: We have watershed opportunities to create an infrastructure plan which supports 6 key ambitions to use the power of the bike as a catalyst for change. We will ensure that all investments can be evaluated against the following questions of “Does this investment support, Cycling as Transport, Major Cycling Events, Cycle Sport, Cycling Industry, Cycling Tourism, Cycling Participation”





## SECTION 7 - Partnership Delivery Plan





# PARTNERSHIP will Unlock the Power of the Bike



Forestry and  
Land Scotland  
Coilltearachd agus  
Fearann Alba





REP

**South of Scotland**  
Regional Economic Partnership