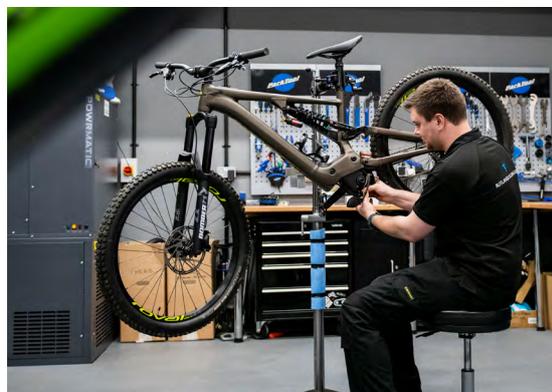




## A 25,000 Cycling Green Jobs dividend from hitting London's net zero 2030 target

- Hitting London's net zero 2030 target will involve a large increase in cycling
- This increase would generate a huge 25,000 new, green jobs in London's "Bicycle Economy"
- £4.8 billion each year in extra economic value would also be generated – £500 per Londoner
- This is a big jobs and economic dividend on investment in cycling that London will have to make anyway
- This is an unmissable opportunity to create new career opportunities for disadvantaged Londoners, help revitalise London's high streets and support a Just Transition

## 25,000 new, green jobs and almost £5 billion p.a. of extra economic value



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We are in a climate emergency. In response, the UK has set the most ambitious carbon reduction targets of any G7 country. The Mayor of London is galvanising London's response, through a goal of achieving a net zero capital by 2030 – doubling the size of both the city's green economy and the number of green jobs in London along the way.

A radical shift to cycling is essential to help us get there. Every day, over 3 million journeys are made in London that are short enough to be cycled – half under 3 km, and over two thirds without luggage or goods. That's about 25% of all car occupant mileage. Every car journey that is switched to a cycle, e-bike, cargo bike or adapted cycle (or indeed e-scooter), delivers an instant carbon saving – as well as cleaner air, less congested streets and better health for the rider. London has done well over the last decade to help more people to cycle. But we have as yet only scratched the surface of London's cycling potential.

For this radical shift to happen, there must be a transformative increase in protected space for cycling on London's roads – people won't cycle unless they feel safe enough to do so. That's the job of politicians. Their vision and boldness is key, and even more political determination will be needed between now and 2030. But the people who work in London's Bicycle Economy are the ones who will make those cycle journeys real. Their jobs are green jobs.

Every cycle sold by a vendor delivers a zero emissions alternative to the car. Every cycle kept on the road by a mechanic, helps to keep cars off the road. Every person helped to ride by a cycling instructor is given the chance to be – and experience the joy of being – a green revolutionary, each time they cycle.

From manufacturing to sales, maintenance to cycle parking, training to on-demand services, London's Bicycle Economy is already delivering carbon savings today, and can deliver even more in future. And on top of this, the expansion of London's Bicycle Economy in line with creating zero carbon roads by 2030 will deliver a major green jobs dividend, taking a big chunk out of the Mayor's green jobs target, as well as bringing a huge economic dividend for the whole city.

A massive 25,000 new, green jobs and £4.8 billion per annum in economic value, in fact.

## Helping disadvantaged Londoners, boosting London's high streets and contributing to a Just Transition

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As well as the jobs and economic dividend, this expansion also offers an unmissable opportunity to create new career and business opportunities for some of London's most impoverished and disadvantaged people, as well as for those rendered unemployed by Covid. Plus, with these jobs being distributed all over London, it will help rejuvenate London's ailing high streets, hit hard by the double whammy of first the financial crash and now the pandemic.

Further still, this opportunity supports a Just Transition for London. As carbon intensive jobs in our city decline, the Bicycle Economy provides a new employment pathway for those workers who are displaced. For example, the greater mechanical simplicity, modularity, and reliability of electric cars will likely reduce the need for local garages; an expanded Bicycle Economy will provide a new home for such skilled labour and new opportunities for small businesses.

London has the chance to build the biggest Bicycle Economy of any major European city, with all the new green jobs and economic benefits that go with it. By linking further investment in the cycling network to investment in skills, education and businesses development, it can win this jobs and economic dividend and stimulate entrepreneurship in a new mobility economy, leaving the old private car-based model behind. It's an opportunity London must grasp with both hands.

Let's now put some figures on this.

## What the data says

To begin with, the big ticket numbers: the UK government has set a target of a 68% reduction in carbon emissions by 2030 (compared to 1990) and the UK's sixth carbon budget under the Climate Change Act requires a 78% cut by 2035<sup>1</sup>. We've already achieved a 50% cut<sup>2</sup> but the tougher half is now ahead of us. Today's emissions will have to be slashed by a third over the next eight years if we are to stay on track – a faster rate of reduction than we have managed to date. The UK, and England in particular, will not stay on track unless London, the UK's biggest city by far, does so. This is the UK context within which the London's zero carbon 2030 target sits.

At 25%, transport is the biggest single source of London's carbon emissions – the only sector in which emissions have remained stubbornly high whilst emissions have fallen everywhere else<sup>3</sup>. This situation must be reversed if London is to hit the net zero by 2030.

However, even under the most optimistic assumption for the rate penetration of electric vehicles (EVs) in London's private car market over the next nine years, there will still be a large number of internal combustion engine (ICE) cars on the road come 2030, accounting for two thirds of all car mileage<sup>4</sup>. Plus, based on the average mix of European electricity, an EV in use today delivers a life cycle carbon cut of two thirds compared to an ICE car<sup>5</sup> – substantial, but not zero carbon until the grid is 100% green (which the UK government has said must happen by 2035<sup>6</sup>).

Moreover, with the Government banning the sale of such cars by 2030<sup>7</sup>, Londoners are in increasingly urgent need of zero carbon alternatives such as cycling, especially to avoid potentially unsafe and unsanitary over-crowding on public transport, even if the latter is expanded to help meet London's climate targets as it should rightly be.

**havebike...**  
WILL RIDE 

Havebike's Nick Brown saw a gap in the market for bike fleet support plus timely and convenient bike servicing and repairs to your door.

**Staff:** 12 in 2019, 43 in 2021, projected 200 in 2022

**Based in:** Kennington, Lambeth, serving London

Havebike is a multi-faceted, unexpectedly tech-enabled business, which enables staff to focus on the jobs they enjoy doing. Progressive management supports career paths and promotes staff retention and investment capital has facilitated growth.

Nick says one of the biggest challenges to fuelling growth is securing a new skills pipeline that doesn't mean he is just taking staff from other businesses.

The good news is that mass mode shift from ICE cars to cycling can deliver substantial, quick wins. Achieving that requires scaled up, sustained investment in safe cycling infrastructure, low traffic neighbourhoods, cycle parking, and other measures. Transport for London (TfL) and at least some of London's boroughs have made important progress in recent years to facilitate more cycling. This investment now has to be made at substantially increased scale everywhere in London.

Now let's look at the green jobs and economic dividend that arises from this required increase in cycling investment.

The Bicycle Association (BA) has commissioned the independent analysts Transport for Quality of Life (TQoL) to use the BA's access to unprecedented real world data to (a) examine the size of London's economy today, (b) assess how much cycling can be grown to hit London's zero carbon 2030 target (accounting for the increased trip distance that e-bikes enable) and (c) calculate the jobs and economic dividend that would result.

The results are eye catching.

Today, the Bicycle Economy in London employs around 8,000 people: cycling's contribution to hitting net zero London 2030 could deliver a further 25,000 jobs (based on a mode share increase from about 2% at present to 14% – equivalent to York and Cambridge levels and those of 80 large cities around the world). This would take a big slice out of the 317,000 new green jobs the Mayor intends to create by that date (mostly in the buildings retrofit sector). Better still, this is a green jobs dividend on investment that TfL will necessarily have to make *in any case*, if it is to keep London moving and play its part in hitting net zero.

**BROMPTON**

Brompton is a UK-based leading global manufacturer of folding bikes.

Staff: 750

Based in: Greenford, Ealing

Brompton's vision to transform the way people move in cities, with high quality bikes, all made in London and with 75% exported, is a key contributor to the London bicycle economy.

Operating in the high growth folding and electric bike market, with demand significantly outstripping supply, expansion would present greater green job opportunities.

Supply chain and logistics risks challenge to accelerate Brompton's production capacity and innovation to fulfil the scale of brand and local economic potential.

## Opportunities for everyone

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These jobs will not just be in narrow specialisms: they will comprise opportunities across a broad range of skillsets, including retail, logistics, assembly, marketing, training, infrastructure/construction, digital services and maintenance. Better still, there is a real opportunity for reshoring cycle manufacturing. Whilst some manufacturing of cycles and parts does already take place in London, with a considerable total turnover of £160 million (2020), the vast bulk of manufacturing is currently done overseas.

The GLA's Better Futures programme and Green Skills Academy have been established to create a world class cleantech sector in London and generate thousands of green jobs; in the same way, collaborative action between the GLA, industry and the further education sector can help deliver a pipeline of Bicycle Economy careers for a wide diversity of Londoners, as well as set up facilities to attract more manufacturing to the capital. Such facilities could include cycling innovation hubs/incubators and test centres to undertake the necessary standardised fatigue testing. Indeed, structured well, these new career opportunities can be targeted at London's most disadvantaged or most economically at risk people.



Spirit Cycle is a small, independent bike retailer who opened its doors two years ago in response to the Waltham Forest Mini-Holland project opportunity.

**Staff:** 2 in 2019, doubling to 4 in 2021

**Based in:** Waltham Forest

Cycle Spirit operates within a borough-supported, high-density, cycle hub, and has benefitted from the local investment-led boom in cycling, doubling in size.

The emphasis has been on being approachable and appealing to 'non-lycra' cyclists and in particular, supporting older customers, with for example trikes, and cargo bike servicing.

Continuing to build awareness of the new cycle infrastructure and connecting the network to other areas will continue to help optimise new cyclist uptake.

London's Bicycle Economy also generates around £1.4 billion p.a. in economic value at present (out of a UK total of £5 billion p.a.): increasing the level of cycling in London to a level consistent with achieving a net zero city by 2030 will deliver £4.8 billion per annum in health, environmental and productivity benefits to the capital. That's almost £500 per Londoner, per year – a big bonus on the widely accepted benchmark for investment in international standard safe cycling infrastructure of around £25-40 per head annually.

Note that this doesn't include the green jobs and economic potential from commercial cycling. Decarbonising London's logistics sector will require increased consolidation and use of electric cargo-bikes for last mile deliveries and courier services. In a megacity like London, a rise in commercial cycling could create thousands more jobs on top of the 25,000 calculated above for the consumer sector. And if Londoners choose the route of e-cycle hire well as cycle ownership, then the economic activity and jobs involved in these services will make the overall dividend higher still.

So, investing in making all of London safe enough for people of all ages and abilities to cycle for their everyday journeys (and creating more opportunities for more commercial journeys by electric cargo-bike) will not only achieve the primary goals of saving lives, increasing physical activity, cleaning up our air and reducing carbon emissions, it will also deliver a big boost to London's economy and create tens of thousands of green jobs.

## Everybody wins

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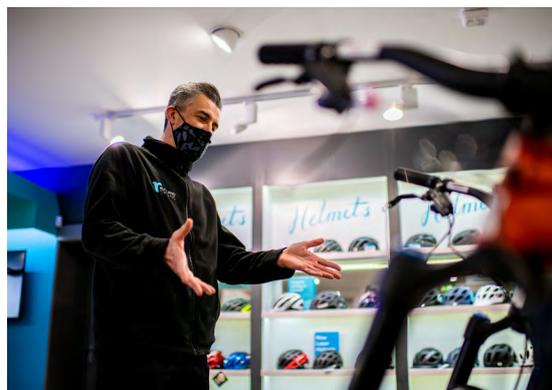
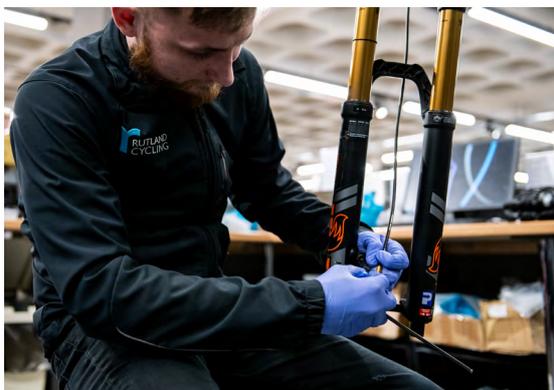
Survey after survey shows that a large proportion Londoners want to cycle, or cycle more (a 2021 TfL survey identifies "a near market for cycling of over 40% of Londoners"<sup>8</sup>), and would do so if our streets were made safe enough for cycling. Since the advent of Dutch style cycling infrastructure in London, triggered by London Cycling Campaign's **Love London, Go Dutch** campaign in 2012 (supported by the Bicycle Association), there has been an upsurge in cycling. This has accelerated during the pandemic, as people have flocked to the temporary cycling infrastructure that has been installed by TfL to provide key workers with a socially-distanced alternative to curtailed public transport, as well as to offer a safe option for exercise for everyone.

Cycling is beginning to diversify too. Data from TfL shows that in recent years more women and people from BAME backgrounds are cycling<sup>9</sup>; and the huge rise in weekend cycling seen during lockdown, as well as data gathered from Mini-Hollands and Low Traffic Neighbourhoods, strongly suggest that more and more families are cycling as well.

These are the people that a world leading Bicycle Economy in London by 2030 will serve. We talk quite rightly about safeguarding the environment, improving public health reducing congestion, boosting London's economy and creating green jobs; all of these public policy objectives must be at the top of the political agenda. But at a more fundamental, human level, we are talking about giving Londoners the chance to do something they want to do, often simply for the pleasure of it.

Everybody wins. No wonder cycling is often termed the miracle cure.

## Next Steps



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LCC and the Bicycle Association are now engaging with a broad range of London stakeholders and businesses about this job creation potential and how best to realise it. We will identify skills and training provision needs, business development and reshoring manufacturing opportunities and identify the partnerships needed to build a world leading city Bicycle Economy.

If you would like to be part of this important conversation about London's future, please contact Kirsty Ratti ([kirsty@bicycleassociation.org.uk](mailto:kirsty@bicycleassociation.org.uk))

## Endnotes

- 1 UK government, 20th April 2021 <https://www.gov.uk/government/news/uk-enshrines-new-target-in-law-to-slash-emissions-by-78-by-2035>
- 2 Carbon Brief, March 2021 <https://www.carbonbrief.org/analysis-uk-is-now-halfway-to-meeting-its-net-zero-emissions-target>
- 3 London Energy and Greenhouse Gas Inventory, GLA, 2018 data <https://data.london.gov.uk/dataset/leggi>
- 4 Transport for Quality of Life, The Economic Benefits of Local Cycling Investment, Greater London Case Study – Report for the Bicycle Association, 2021. <https://www.bicycleassociation.org.uk/advocacy/>
- 5 Financial Times <https://ig.ft.com/electric-car/>
- 6 UK government, Net Zero Strategy, October 2021 <https://www.gov.uk/government/publications/net-zero-strategy>
- 7 UK government, 18th November 2020 <https://www.gov.uk/government/news/government-takes-historic-step-towards-net-zero-with-end-of-sale-of-new-petrol-and-diesel-cars-by-2030>
- 8 Transport for London, Barriers to Cycling, April 2021
- 9 Transport for London, 19th October 2021: <https://tfl.gov.uk/info-for/media/press-releases/2021/october/the-people-cycling-in-london-are-more-diverse-than-ever>

The London Cycling Campaign (LCC) is one of the largest urban cycling campaigns in the world. LCC campaigns for action by London's political leaders to make London's roads safe enough for people of all ages and abilities to cycle for their everyday journeys, helping to create a greener, healthier, fairer and happier city. LCC's Climate Safe Streets campaign is calling for the decarbonisation of London's roads by 2030, with cycling at the heart of this transformation.

Website [lcc.org.uk](http://lcc.org.uk)  
Twitter [@london\\_cycling](https://twitter.com/london_cycling)  
Facebook [LondonCyclingCampaign](https://www.facebook.com/LondonCyclingCampaign)



The Bicycle Association is the national trade association for the UK cycle industry. The BA works to represent the best interests of the UK cycle industry to government, stakeholders and the general public. The mission of the BA is to grow cycling, particularly everyday transport cycling, and to grow the cycling market in the UK.

Website [bicycleassociation.org.uk](http://bicycleassociation.org.uk)  
Twitter [@BicycleAssoc](https://twitter.com/BicycleAssoc)

The BA's Market Data Services draws data from over 70% of the UK Cycling Market and is "powered" by Sports Marketing Surveys, the BA's data partner. The MDS database now comprises over 1 million cycling products with history back to January 2018 and is a powerful tool to help businesses understand UK cycling market trends and identify growth opportunities as well as to support the BA's advocacy program.