MISSION ON THE ECONOMIC SECTOR OF THE BICYCLE IN FRANCE
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ECONOMIC SECTOR OF THE BICYCLE

REPORT

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The idea of this mission was born out of exchanges with several bicycle stakeholders at the end of 2020. I proposed that they participate in a committee to monitor this mission. Thank you to them for agreeing to take part in the monitoring of this work, and thank you for the advice, comments, questions and energy shared. Thank you to Thierry Du Crest, interministerial coordinator for the development of bicycle use, Olivier Schneider, president of FUB, Jérôme Valentin, vice-president of USC, Patrick Guinard, president and Christine Laymard, director of APIC, Catherine Pilon, general secretary of the club of cycleable and walkable towns and territories, Camille Thomé, general delegate of Vélo & territoire, Elodie Trauchessec of ADEME, and the team at Boîtes à Vélo France. Thank you also to the teams of Business France and in particular to Olivier Pradet for our numerous exchanges and for sharing his expertise throughout this mission. Thank you to them for their permanent, benevolent and optimistic commitment to the development of cycling.

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To summarise

For several years now, we have been observing a change in the use of bicycles. For more and more French people, cycling is becoming a daily mode of transport. In 2018, the State presented a Bicycle Plan which can be seen as the beginning of a recognition of the bicycle as a mode of transport with a goal of increasing its modal share from 3% to 9% by 2024, then to 12% by 2030. Good for the environment, good for health and good for the finances of individuals and companies, this transport policy needs to be further strengthened, particularly at a time when we are experiencing successive energy price crises. We must look with interest at the economic prospects that the development of cycling for everyday journeys offers to our industrial and economic players.

The revolution in practices that we are observing today is leading to a need for quality equipment. Moreover, this need for equipment comes at a time when the bicycle is undergoing major technological changes with the development of the electrically assisted bicycle and the cargo bike. Between 2019 and 2021, the number of EABs sold rose from 400,000 to 700,000 and it is expected that more than one million will be sold per year by 2025. For cargo bikes, the need is estimated at 300,000 by 2027, which means going from 11,000 cargo bikes sold per year to 60,000 units. At a time when our country wishes to produce again on the national territory what it consumes and that it consequently sets up a true policy of reindustrialisation, these medium or top-of-the-range bicycles represent real opportunities of growth of activity for the French manufacturers.

In a sector that has been heavily dependent on Asia for several decades, producing more bikes in France is a real industrial challenge. Today, of the 2.685 million bicycles sold in France, only 690,000 are assembled there. To succeed in this challenge of reindustrialisation, we must invest heavily in the development and modernisation of our factories, as well as in our production tools. At the same time, we must invest in innovation in order to identify future technological breakthroughs in cycling. We need to develop work between the various players in the bicycle industry, but also exchanges with players in other industries in order to create partnerships for the production of components, such as with the automotive or aeronautical industries, for example. Finally, the production of bicycles in France, which is ecologically and socially more virtuous, must be recognised through the establishment of a France Vélo label and the structuring of a second-hand market.

The economic challenge of developing the bicycle is not limited to the industrial challenge. The bicycle ecosystem is diverse and also includes the service, repair and maintenance, cycle logistics and cycle tourism sectors. All of these sectors are also expanding. A significant number of jobs could be created in the next few years, more than 100,000 jobs by 2050 according to several estimates.

The prospects for economic development are significant for the bicycle sector, but they remain conditional on the structuring of the sector, the creation of professional training for all the trades in the sector, and the development of cycling infrastructures, which are still largely insufficient in France. To this end, I propose in particular the creation of a sector committee bringing together all the economic players in the cycling sector and the updating of the 2018 cycling plan this year in order to have all the tools available to pursue the development of cycling by increasing the active mobility fund to 400 million euros per year in order to really accelerate the development of cycling infrastructure in all our territories.

The purpose of this report is to contribute to our work on developing cycling in France and promoting the economic development of the sector. These two issues are entirely linked. The proposals made in this report open up a number of avenues and mobilise private, public and associative players alike, although the distribution between them remains to be defined.

Summary: 10 measures for a cycling industry

- FURTHER RECOGNITION OF THE BICYCLE AS A MODE OF TRANSPORT IN ITS OWN RIGHT
- TO CREATE A FRANCE BIKE LABEL THAT INTEGRATE SOCIAL, ENVIRONMENTAL AND ECONOMIC CRITERIA
- ACTIVELY MODERNISE INDUSTRIAL TOOLS
- CREATE A BICYCLE INDUSTRY COMMITTEE WITH THE INDUSTRIAL AND ECONOMIC ACTORS OF THE BICYCLE INDUSTRY
- LAUNCH A GENERAL REVIEW OF THE BICYCLE ECONOMY IN THE COMING MONTHS
- DEVELOPING TOOLS TO STRENGTHEN INTRA- AND INTER-BRANCH WORKING
- STRUCTURING A MARKET AFTER
- MAKE VAT DEDUCTIBLE FOR THE PURCHASE OF BICYCLES FOR PROFESSIONALS
- CREATE NEW TRAINING COURSES FOR ALL CYCLE PROFESSIONS
- UPDATE THE BICYCLE PLAN BY INCREASING THE ACTIVE MOBILITY FUND TO 400 MILLION EUROS PER YEAR

Proposals

INTRODUCTION: FOR A BICYCLE ECONOMY IN FRANCE

A few months ago, at the end of a working meeting on the health crisis, the Prime Minister, Jean Castex, asked us if we had any concerns to bring to his attention. I took the opportunity to draw his attention to the production of bicycles in France. If we continue to develop the use of bicycles, we must ask ourselves the question of the economic opportunities for our companies and our regions. Very concretely, I mentioned to him for the first time the need to rebuild a bicycle industry in our country.

Since this exchange, during the summer of 2021, I have carried out an initial tour of France with the Club des villes et territoires cyclables (Cycling Towns and Territories Club) of the cycling industry. I went to the European Velocity trade fair held in Lisbon in September and on 5 October last year I was given a mission by the Prime Minister to structure the bicycle industry in France. This is one of the most challenging missions I have had to undertake since 2017 after the Grenelle on domestic violence in 2019.

As part of this mission, I have continued my field visits and conducted some fifty hearings.

Getting into this subject means, of course, talking about the challenges of developing cycling in our country, this everyday mode of travel that can represent an alternative to the car for millions of our fellow citizens, as long as there is infrastructure, bicycles, repair networks, etc. Today, 40% of trips made by car are for distances of less than 3 kilometres. There is considerable room for improvement in cycling.

Getting into this subject means working on our environmental policies and on the tools we can put in place to reduce greenhouse gas emissions, and to get out of the self-propelled society. Cycling is also a means of transport that provides concrete solutions to the energy crisis we are experiencing and to the continuous rise in energy prices that penalise many of our fellow citizens. Given the times we are living in, cycling is a solution that must be looked at closely and intelligently. Other countries before us, I am thinking of course of the Netherlands and Denmark, developed this means of transport in the 1970s because of the consequences of the two oil crises at the time.

Getting into this subject means talking about the environment, and also about health and well-being, as this mode of transport has proven virtues for our health: 10 km of cycling per person per day generates savings of 2,700 euros in health costs, notably through a reduction in cardiovascular mortality. If we meet our commitments to increase the proportion of journeys made by bicycle from 3% to 9% by 2024, which would require us to greatly accelerate our efforts, the annual savings in terms of health expenditure are estimated at five billion euros.

Talking about cycling also means talking about the economy, it means entering into the life of our territories, into the history of French industry. It means looking at the mistakes that our country has made over the last fifty years, thinking that France could no longer build what it needed locally. The bicycle industry was hit hard until very recently. In the 1980s, our country was one of the world leaders in this field. In the space of a few years, everything collapsed and we became almost totally dependent on Asian countries.

In France today, we know how to build a nuclear submarine or a Rafale, but we no longer know how to make a bicycle derailleur or a frame. Is this acceptable? No. Especially when this loss of know-how results in a delay in access to bicycles for French men and women and in the deployment of a major environmental and health policy. Especially when this loss of know-how slows down an entire economic sector. At a time when we are supporting the reindustrialisation of the country, the question of the development of the bicycle industry is essential. It is even more important in view of the rapidly growing use and demand of the French. Structuring the bicycle industry, studying the avenues that should to revitalise this sector in the future, is of course to touch on the subject of the reindustrialisation of our country.

During this fascinating mission, I quickly acquired two convictions. Firstly, we will not recreate what existed in the past: we must absolutely target our segments of activity and succeed in deploying ourselves on the mid-range or high-end technological markets. The revolutions of the electrically-assisted bicycle (EAB), the cargo bike and connected objects represent real opportunities for our manufacturers. On the other hand, we need to develop bridges and partnerships between the different industrial and economic sectors, and break out of our divisions. In concrete terms, players in the bicycle, automobile, aeronautics, electronics, screw-cutting, French tech, etc. sectors must work together.

Of course, the bicycle industry is not just about industry. The sector also covers the economic challenges that the development of cycling represents for our services. I am thinking in particular of bicycle services such as repair and maintenance, self-service bicycles, leasing and the development of digital applications that facilitate the use of bicycles. It is also the development of bicycle tourism and its opportunities for our territories, as well as the study and implementation of dedicated infrastructures. The potential for employment is also to be found in these downstream cycle production sectors. However, the development of the bicycle industry cannot be achieved without removing the obstacles to the deployment of cycling infrastructure, the fight against theft and the massive learning of how to ride a bicycle by young people. These are essential conditions for the proper development of cycling in France and therefore of its economic sector.

The bicycle economy is just one example of the mistakes of the recent industrial past and the positive prospects that are opening up before us. Let us know how to seize them, let us know how to trust the actors involved and often passionate, and our capacity to write a new economic history in the service of the transformation of our country and the preparation of the future. This is the purpose of the proposals I am making in this report.

1. THE BICYCLE, A USE IN FULL REVOLUTION

A. From sport to transport

To study a sector, you have to start from its history, its uses and its market. France has a special history with the bicycle. Of course, France is the country of the Tour de France, the Paris-Roubaix, the Bordeaux-Paris, the country of the great stories of the sporting part of cycling, and even of myths. It is also a country where, for a long time, the bicycle has been a popular means of transport, an essential industrial object that has fuelled the life of historic industrial areas such as the Saint-Etienne basin. To enter into the question of the structuring of the bicycle industry is to look at the history of our society's choice to turn entirely to the automobile and the motorbike during the 1960s, to transform our territories and our cities by leaving all the space to these modes of transport. It means looking back and observing how our country decided, by suffering more than choosing, to abandon our everyday industries in the 1970s, considering that we no longer needed to produce the objects we needed in France and thus missing out on major technological developments. It is this history that has made the bicycle since the 1970s an object essentially dedicated to leisure or sport in our country. These trajectories have had consequences for usage. This explains why, for several generations, cycling is primarily a leisure activity before being a means of daily travel.

Today, the bicycle is the main mode of transport for 4% of French people, far from the European average of 12%. However, it represented almost 20% of journeys in the early 1950s and 10% in the early 1970s. Today, 30 million French people over the age of 15 cycle at least once a year, but only 3.3 million use it daily.

B. The potential of cycling as a means of transport in France

In other countries, such as the Netherlands or Denmark, a different story has been written since the end of the 19th century and accelerated at the time of the oil crises, making the bicycle a means of transport before being an object of leisure. The story could therefore have been different in our country. But today that is changing: it is a real revolution in the use of bicycles that we are currently observing in France. For more and more of our fellow citizens, the bicycle is becoming a means of daily travel, a means of transport. For example, a study by the association Vélo & territoires in April 2021 announced that cycling had increased by 30% in urban areas in 2021 compared to 2019, by 42% in suburban areas and by 38% in rural areas. In addition, the president of the French Federation of Bicycle Users (FUB), Olivier Schneider, announced in 2018 that nearly 60% of French people were ready to switch to daily use of the bicycle provided they had the infrastructure to do so, an intention that we also observed in 2016 with a survey published by the newspaper Le Figaro on 4 October 2016, which revealed that 50% of French people were ready to walk or cycle. These figures are not surprising when you consider that 40% of car journeys are made for distances of less than 5 km and 60% for home-to-work journeys alone.

C. France's lag in cycling

Bicycles are reappearing almost everywhere, often in a disorderly fashion due to the lack of permanent infrastructure, as France has very few of them, in the middle of cars, hanging from barriers or posts. Tensions between motorists and cyclists are fuelled by this disorder, by this renaissance imposed on the public authorities. This change in practices has led cyclists to organise themselves into associations since the 1970s in order to force local public authorities to take action in recent years and to implement the beginnings of real local public policies for the development of cycling infrastructures. While local authorities' investment in cycling was €328 million in 2008, it was €468 million in 2019, an increase of 40%, mainly driven by the action of large urban areas. Faced with this considerable delay, in 2018 the State finally decided to give a real boost with the implementation of the cycling and active mobility plan co-constructed with cycling associations, the most important of which is the FUB. This plan, which has been awaited for many years by all those involved in cycling, was presented by Prime Minister Edouard Philippe in Angers on 14 September 2018, accompanied by ministers François de Rugy and Elisabeth Borne. It is built around three main objectives, developing infrastructure with the establishment of a €350 million bicycle fund over seven years with

350 million over seven years with the aim of increasing the modal share of cycling from 2.6% to 9% in 2024 and 12% in 2030, combating theft with the compulsory marking of bicycles, and setting up a genuine public policy for learning to cycle with the "Learn to ride a bike" plan.

D. The challenges of velorution

The factors that explain the start of the "bicycle movement" we are witnessing in France, i.e. the transition from a practice almost exclusively centred on leisure to one that enables people to travel on a daily basis, are diverse. Firstly, there are the benefits in terms of time saving, health and well-being that many French people find in cycling, even before the environmental benefits. Cycling is practical. For short distances of less than 10 kilometres, particularly in urban areas, cycling is faster and much less expensive than the car. Others have been persuaded to cycle in recent years by repeated public transport strikes or by the health crisis we are still experiencing at the time of writing. It should also be noted that if every day more French people decide to switch to cycling, the same is true for companies and craftsmen, where the use of bicycles is increasing with the arrival of cargo bikes. With the introduction of low-emission zones and the challenge of calming our cities, the development prospects for professionals are enormous.

The public authorities have of course taken note of this development of the bicycle and the desire of a large number of French people and companies to use it. It has started to build infrastructures to make cycling safer. And we are only at the beginning here. Since the presentation of the cycling plan in September 2018 the number of kilometres of cycle paths has increased by 26%. In view of the climate issues we are facing, but also the public health issues, the public authorities have also become aware of the need to no longer only take action in response to the practice of users but also to be the driving force in the development of cycling. With this in mind, the State has set the objective of tripling the modal share of journeys made by bicycle by 2024 to 9%, then 12% by 2030.

The trajectory taken for the development of cycling since 2018 is the right one. But it really needs to be amplified if we are to meet our objectives of increasing the share of journeys made by bicycle and decarbonising the transport sector. We must learn all the lessons from the changes in usage that we are seeing today, and in particular recognise the bicycle as a means of transport in its own right, in the same way as the car, the plane or the train. Such an approach would allow us to give ourselves the means to define over time public policies for the development of this mode of transport in all our territories, public policies that meet the same regulations. Indeed, we cannot continue to have public policies for the development of cycling that respond to different regulations or codes depending on the city or territory. A typical example is the differences in the design standards or colouring of cycle paths that can be seen from one city to another. By comparison, such a difference would be difficult to imagine for the design of the roads we drive on.

Recognition of cycling as a means of transport should also enable us to really rethink the level of budgetary commitment that we need to put in place in order to deploy an ambitious and effective cycling policy in France that meets the objectives of tripling the modal share that we have set ourselves. Today, cycling only accounts for 1.3% of operating and investment expenditure on transport in France1. The average level of financial commitment to cycling is around €10 per year per inhabitant, compared with €271 per year per inhabitant for road policies. I might as well say straight away that this is a level of budgetary commitment that cannot allow us to really develop cycling as a means of transport in our country.

This recognition of cycling as a means of transport must be accompanied by a real communication policy to promote everyday cycling by highlighting its advantages, on the model of the communication campaigns deployed by Amaury Sport Organisation (ASO) during the Tour de France for several years, or in other European countries. In addition to the campaigns run by road safety and messages added to car advertisements, we need to send a signal, on social networks and in the major media, that cycling is a mode of transport of the future, good for the environment, good for health, good for the economy.

[1] Study on the economic impact and development potential of bicycle use in France - April 2020 DGE Ademe DGITM FFC - p.121 / This frequently cited study will be called the "Bicycle Impact Study".

E. Cycling and the bicycle industry

The changes in cycling that we are seeing should also lead us to look at the economic consequences of these uses on the bicycle market, changes that are taking place at the same time as the bicycle is undergoing several technological revolutions with the development of the electrically assisted bicycle and the development of the cargo bike. The bicycle is becoming an increasingly connected object with the appearance of on-board computers, geolocation systems, speed transmission systems using Bluetooth technology, etc. By switching to daily cycling, the French are increasing their requirements in terms of equipment quality, but also the budget they are prepared to spend on it. If the infrastructure development objectives are achieved and if they lead to an increase in daily cycling, we should expect the number of French utility bicycles to catch up, with a real increase in quality. In addition, the demand for maintenance and repair will also be much higher.

Consequently, in an economic market that has been largely dependent on Asia since the early 1990s due to the race to lower prices and the lack of demand for product quality, these changes in cycling practices and technologies should enable us to recreate a local industrial sector in France capable of meeting the demand for equipment from the French. A demand coupled with a certain requirement for quality and transparency on the origin of the products purchased. This market has great potential, with the number of bicycles sold per year in Europe and the UK forecast to rise from 20 million in 2020 to 30 million in 2030. The number of EABs is expected to increase from 4.5 million to over 16 million bikes sold, representing 50% of the market by 2030.

1. PURSUE THE RECOGNITION OF CYCLING AS A MODE OF TRANSPORT IN ITS OWN RIGHT AND ORGANISE OUR ADMINISTRATIONS IN ACCORDANCE WITH THIS RECOGNITION.

2. IMPLEMENT A POSITIVE AND MASSIVE COMMUNICATION PLAN ON CYCLING TO CONVINCE ALL ACTORS OF ITS RELEVANCE AS A MODE OF TRANSPORT.

2. MEETING THE GROWING DEMAND FOR BICYCLES: AN INDUSTRIAL CHALLENGE, A SOVEREIGNTY CHALLENGE

A. An industry facing its history

1. A strong industrial history

France has a strong history with the bicycle industry, even emotional in some areas. French bicycle brands such as Peugeot, Gitane, Mercier, Dilecta, MBK and certain equipment manufacturers such as Manu France, Simplex, Mavic, Zefal and Look have marked this history and reached their peak in the 1970s and 1980s. From a position of world leader in the 1970s, our country became almost totally dependent on Asia at the beginning of the 1990s for all the parts that make up a bicycle, from the derailleur to the frame, via the brakes or the forks, and on Europe for the assembly. In each territory, the cycle industry was a real pride, a pride that is still talked about today. After having let our bicycle industry weaken with the development of the motorbike from the mid-1950s, we missed the mechanical revolution of the mountain bike (MTB) in the early 1980s, and the technological revolutions that affected transmission systems, hydraulic brakes and the electrification of the bicycle with the arrival of the VAE during the 1990s and 2000s. We lost our patents, some of our know-how and our machine tools. We gave up the race for innovation and let our factories decline. In the 1980s and 1990s, due to a lack of vision on the bicycle and on future societal developments, we abandoned our strong history with the bicycle for a while. In this respect, the bicycle industry has experienced what most French industrial sectors have experienced during the same period. In order to gain a better understanding of this period and the mistakes that were made, it would be useful to encourage research into the history of the French bicycle industry, its contribution to cycling and its development, and the difficulties it has experienced. We know better where we are going when we have a good knowledge of our history. In fact, despite my research, I have hardly found any synthetic documentation on the industrial history of the bicycle in France. They have yet to be written.

3. SUPPORT RESEARCH ON THE INDUSTRIAL HISTORY OF THE BICYCLE IN FRANCE

A change in cycling that revives our industrial history

This decline in the bicycle industry is strongly correlated with the fact that cycling, a French passion, was essentially devoted to leisure and sport for several decades. This policy and mindset has led year after year to a steady decline in the use of utility bicycles and therefore a drop in the quality of equipment and prices. Faced with this spiral, our industry obviously could not hold out. Even today, in France, with an average daily cycling rate of 4%, the average purchase price for a new bicycle was 350 euros in 2016 for an average period of use of 2,700 km. By comparison, in the Netherlands, the average daily cycling rate is 45%, the average price spent on a bicycle is 1,000 euros for an average lifetime of 11,000 km.

I am pointing out this threefold correlation between daily cycling, the average price spent per bicycle and the average life span, because it is crucial for the revival of our bicycle industry. The development of the cycle industry will be based largely on the increase in daily cycling by the French, which will lead to an increase in the range of bicycles purchased and used.

This is what we are seeing today with the development of daily cycling. Users have higher expectations of the equipment they use. The person who uses a bicycle on a daily basis to get around will demand a bicycle that is more solid, more resistant, more connected, with good wheels, good forks, a good transmission system, effective mudguards, brakes that brake in all weathers, etc. The evolution of cycling that we are currently observing is leading to an increase in the range of bicycles, which can only be beneficial for our manufacturers, as mid-range and top-of-the-range bicycles are still produced in Europe.

Moreover, this evolution of practices is taking place at a time when we are experiencing the impressive growth of the EAB. It already represents 19% of the market in France and its added value is of course greater than that of the mechanical bicycle. However, this figure is still lower than the situation in some of our European neighbours. The Netherlands already has a 50% share of EAB sales and Germany 40%. This means that the potential for the French market is particularly great.

The evolution and prospects for the development of cargo bikes should also be watched closely, as they are of real interest to companies and craftsmen for journeys of less than 10 km. Some sectors are beginning to make greater use of this means of transport, in distribution of course, but also in the craft industry. The Post Office, for example, plans to triple its fleet of cargo bikes.
The Chamber of Trades and Crafts (CMA) has also launched a campaign to promote cargo bikes among its members, as this mode of transport does not emit greenhouse gases, is less expensive, easier to park and, above all, allows the number of daily operations to be increased. With its very specific frame, the platform being able to be on the front or the back, its intensive use (up to 50km per day with multiple stops), and its capacity to tow a trailer that can carry up to 200kg, the cargo bike and its equipment represent a technologically complex bike. This complexity and the fact that cargo bikes are built in small series compared to more conventional cycles make the cargo bike ideal for local production. In 2021, 11,000 cargo bikes were sold in France at an average price of 3,600 euros. 3,600. This compares with 100,000 sold in Germany. By 2027, the need is estimated at 300,000 additional cargo bikes in France, i.e. 60,000 bikes to be produced per year. It should be noted that the standardisation of this type of cycle remains an open question: format (size, number of wheels), engine power, etc.

Source : Fleximodal

Bicycle accessories: an important part of the sector's financial flows, and parts that can be designed and manufactured in France.

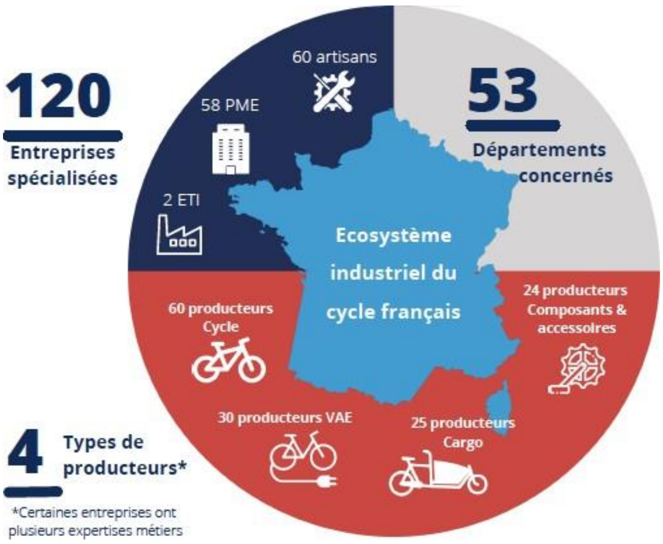
According to the cycle observatory of the Union Sport et Cycle (USC), in 2019 the turnover of the "parts and accessories" part represented more than a third of the French cycle industry: €827 million for accessories compared to €1502 million for new bicycles.

For example, the Zefal brand, located in Jargeau (Loiret), has been run by the same family for five generations since 1880, and employs around a hundred people to offer everything a bicycle might need, from footrests to helmets, from pumps to luggage. More than 60% of the production is made in France, with a turnover growth of +75% in 2019. Also among the accessories are bicycle trailers, which, when designed with robustness and on-board technology in mind, can be worth more than €2,000 excluding tax: the Fleximodal company, based in Cesson Sévigné near Rennes, currently produces around 400 pallet trailers per year, which can load pre-packed pallets. Founded in 2016, it now employs 11 people, sources most of its supplies from the region and generates more than 50% of its turnover from exports. The accessories, whether it is the classic bicycle pump that is regularly improved, or the connected helmet with direction indicators, the indispensable rear-view mirror, the ergonomic luggage rack, or the travel optimisation application with its sensors, are sources of innovation.

A know-how still present in our territories

This rise in the range of bicycles is an opportunity that our industry must seize. While bicycle sales in France this year are in the region of 3 million units, the outlook in the coming years should rapidly bring us to a level of 5 million bicycles sold in France, including one million EABs2 and with users ready to spend more on better quality bicycles.

At this time of rising demand, our objective must be to make the bicycle an object that is built in France. To achieve this, we are not starting from scratch. Although we have lost a number of skills and considerably weakened our production apparatus, this industrial sector has never totally disappeared and several players have managed to safeguard the existence of their activity over the years, despite difficult trials at times, including in the field of machine tools (Mach1, a French manufacturer of machine tools for bicycle spokes, can be found throughout Europe, for example).



Source : Union Sports et Cycles, 2021

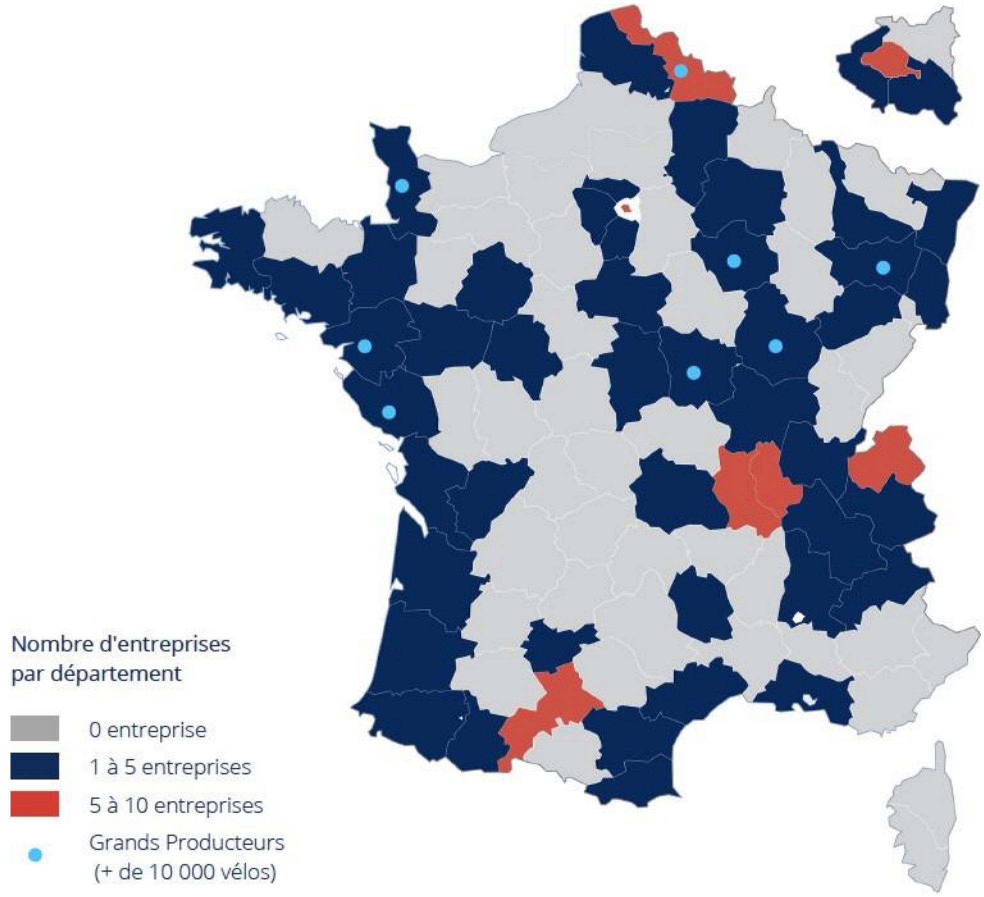
The manufacture of bicycles and a certain number of parts still exists in our territories. Today we have several historic groups that are still present in France and continue to assemble their bicycles in the country. The French cycle factory, Lapierre, Cycleurope, Arcade, and many others still produce in France. Of course, we cannot fail to mention the importance of the Décathlon group which, even if it produces most of its bicycles in other European countries, still has its headquarters, design offices and top-of-the-range production in the North of France. Décathlon is also very committed to the development of everyday cycling. Historic equipment manufacturers, such as Mavic, Velox and Mach1, which make wheels and rims, but also cranksets and sprockets, are also still present. These industrial players are important at a time when the history of the bicycle is making a new start in France. They are important because they are the holders of the history of this sector. During the mission, the exchanges with each of the captains of these industries were each time particularly strong moments. They are important because they have a detailed knowledge of this sector and its realities. They are important because they still have skills and means of production. Finally, they are important because they are passionate about the bicycle, because they strongly believe in its development in France and want to actively contribute to it.

[2] Bicycle Impact Study Scenario p.287

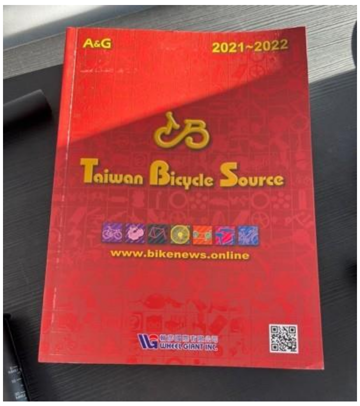
Site visits to French bicycle manufacturers: Arcade, Mavic, Moustache, Décathlon (2021)

Alongside our historical players who are still present in our territories, new companies have been created over the last fifteen years based on market developments, particularly with the emergence of the EAB and cargo bike. Companies such as Moustache, O2feel, Douzecycle and VUF have thus developed over the last ten years to become references in the EAB and cargo bike market. Furthermore, in view of the changes in the bicycle market and its technological developments, major industrial groups are now diversifying into the bicycle sector. I will cite two emblematic examples here. The SEB group has been diversifying part of its activity into cycling for the past year by agreeing to build the ultra-connected VAE of the entrepreneur Marc Simoncini, called Angell Bike, and Valéo, a major automotive equipment manufacturer, is about to market its first VAE engine.

At a time when cycling is undergoing major technological developments and a revolution in its use, the opportunities for our industry are very real. During our visits, all the players we met told me about the significant growth in their activity and the industrial development projects they are carrying out. In the following, I will talk about the challenges of reindustrialisation.



Source : Recensement des industriels du vélo, infographie Union Sports et Cycles, 2021



To succeed in the industrial challenge, we need to remove two initial obstacles. Firstly, we must stop setting limits in advance that we cannot exceed. No, it is not impossible to build bicycle frames in France today, for example. No, it is not impossible to invent future technological breakthroughs in cycling in France either.
Secondly, we need to know exactly which cycle players are present in France and in which territories. The proposal may seem simple, but the French bicycle industry needs a directory of its industrial players, on the model of the one that exists in Taiwan. This issue is taken up in my development of the sector.

4. TO ESTABLISH A COMPLETE CATALOGUE OF THE CURRENT BICYCLE INDUSTRIES IN FRANCE AND THEIR PRODUCTIONS

A. An industry facing its image

During the mission, in the course of the discussions, one of the answers to the explanation of the decline of our cycle industry struck me. This answer concerned the very image of the bicycle: the bicycle would be a small technology, a simple technology with little added value that it would no longer be up to us to manufacture in France, the product no longer being noble enough. This is a terrible response. The reality of cycling is not that. The image of the bicycle must change and it must be recognised by the Haut-Commissariat au Plan as a product with sovereignty issues.

Recognising the bicycle as a constantly evolving technological product

Since its invention, the bicycle has been a continuously evolving technology. Let us look at bicycles from a hundred years ago, fifty years ago, twenty years ago and even ten years ago. The bicycle changes through time, through the mechanical and technological evolutions and even revolutions that it undergoes. At a time when we are witnessing an evolution with an increase in the use of the bicycle as a mode of daily transport, it is important to recognise the bicycle as an evolving technology. This recognition must allow us to develop adequate research and development policies to find the technologies of tomorrow, especially for increasingly electrified and connected bicycles. It is certain that in the years to come, the design of frames, the robustness of forks and brakes, the technology of speed transmission systems, the motorisation of EABs, the durability of batteries, anti-theft systems, aerodynamics and the strength of wheels, for example, will have to evolve. Let us bear in mind that the EAB increasingly makes it possible to do without a derailleur, that gear shifting on certain bicycles is done by Bluetooth, that anti-theft systems make it possible to geolocate one's bicycle, to block it remotely, or even to sound an alarm. Let us bear in mind that improving the quality of the wheels on an everyday bicycle can save up to 20% of energy. All the technologies for the electrification of the bicycle, whether it be batteries, hydrogen or the transformation of human power into electricity, are in constant evolution. Let's bear in mind that tomorrow we will be able to design and build bicycle frames that are ever more solid and light, thanks in particular to the bridges that can be built with other manufacturers such as those in the automobile and aeronautics industries.

Furthermore, we should also bear in mind that the bicycle is a fine technology which, because of its use on the road or on the paths, is regularly subjected to intense shocks, which still requires regular human adjustments and therefore a certain amount of maintenance work. This analysis on the constant technological evolution of the bicycle obviously applies to the cargo bike.

As a technological object undergoing regular technical and technological developments, a real policy of support for innovation must be put in place to support the development of the EAB and the cargo bike in particular. In addition to the measures to be put in place to achieve the goal of reindustrialisation, this policy must enable us to identify future technological breakthroughs.

On these technological ruptures, the Impact vélo report and Business France have listed avenues of work for the VAE, without even mentioning the classic bicycle:

- Frame design: the EAB is currently designed as an electrified bicycle with a shaped and welded tube frame requiring significant human intervention making it uncompetitive in France. Almost all frames currently come from South East Asia. However, the design could be completely redesigned for production in France. The design of a frame in two parts of pressed and electro-welded steel sheet, inexpensive when mass-produced, with shapes that protect and integrate the battery and motor remains to be imagined. Steel alloys have a dimensional stability that makes it much easier to automate welding while remaining light;
- The electronic systems for regulating the motor and the battery are also components on which R&D can bring about major technological breakthroughs. The French Atomic Energy Commission (CEA) has filed patents for battery management by switching, the applications of which to the EAB would make it possible to envisage much longer lifetimes with control. Other new technology companies are working to innovate on the subject of batteries;
- Financial support for the research and development of these breakthroughs should be encouraged and developed. Several French bicycle companies have developed R&D projects that are already very successful introducing real technological breakthroughs. Moreover, France has a powerful automotive industry capable of investing in R&D and innovating in the ECV segment;
- The inclusion of the bicycle industry in support programmes for French industry. For example, the bicycle industry could be included in calls for structural research and development projects for competitiveness (PSPC) and other support programmes dedicated to industry, particularly the industry of the future, to encourage the development of disruptive technologies and innovations;
- To set up an incubator dedicated to innovations in bicycle technologies and focused on the search

for future technological breakthroughs.

5. SUPPORT AND ENCOURAGE INNOVATION AROUND THE BICYCLE, ITS COMPONENTS AND TECHNOLOGIES
6. INCLUDE THE BICYCLE INDUSTRY IN RESEARCH AND DEVELOPMENT PROJECTS THAT STRUCTURE COMPETITIVENESS
7. CREATE A BUSINESS INCUBATOR DEDICATED TO CYCLING AND ITS INNOVATIONS

Bicycles, also a craft product

During the trips made as part of this mission, the subject of bicycle craftsmen was raised on several occasions. The number of bicycle manufacturers is increasing and will represent around one hundred small businesses in 2022, compared with around ten in the 2000s. They are united within the association of cycle craftsmen. They represent several hundred jobs and several thousand bicycles produced per year. These are top-of-the-range bicycles, often made to measure.

This sector represents a triple interest for the bicycle industry:

- As they are produced in small units, artisanal bicycles are for the most part entirely built in France. Thus, the handmade bicycle demonstrates our ability to produce bicycles almost entirely in France and offers the possibility of strong territorial anchoring, particularly in peripheral or outlying areas. In addition, small-scale cycling creates more jobs than industrial production. According to ADEME data, the multiplier effect of industrial employment for bicycles is 11.3 direct and indirect FTEs for one million euros in bicycle sales. The ratio for small-scale cycling is 35 direct and indirect FTEs per million euros of turnover;
- The artisanal bicycle gives off an image of excellence in this technology, which is similar to the luxury industry. Artisanal bicycles can be beneficial for the image of the French bicycle industry, particularly internationally, with a French touch;
- Artisanal bicycles make it possible to develop certain advanced technologies applicable to bicycles. We can think of technologies for modernising anti-theft devices, bike geolocation, modernising transmission systems, etc. These bicycles produced in very small series also represent a real interest for the large industrialists in the sector, some of whom do not hesitate to have real work or exchange logics in common. Thus, during the visits to the Cycle Europe and Arcade companies, a presentation of several bicycle craftsmen was organised in order to illustrate the importance of this sector in the industry and the bridges between large industries and craft industries

Artisanal bikes must be taken into account in the development of cycling and the construction of an economic sector for cycling.

Making the bicycle an ecologically and socially responsible product to be produced in France

The bicycle is an ecologically responsible mode of transport, good for health and well-being. It also saves money and offers prospects for the development of certain activities and employment in our regions. These advantages are real and should of course be highlighted. Nevertheless, work needs to be done on two aspects of the cycling ecosystem that need to be improved today.

Firstly, we must make the bicycle, its manufacture and maintenance an eco-responsible and sustainable product. Today, most of the parts that make up a bicycle manufactured and sold in France, starting with the frame, are manufactured in Asia at particularly low prices and are transported by container by sea. This dependence leads to a deficit in the trade balance of the bicycle sector of 241 million euros in 2019 and 264 million euros in 2020 according to the report of the Haut-Commissariat au Plan on the reconquest of the productive apparatus published on 7 December 2021. A deficit that is growing in particular because of the increase in the sale of VAE. In this report, the Haut-Commissariat au Plan very legitimately lists some fifty products for which we must regain control of production. This is an industrial and sovereignty issue, but also an environmental issue. At a time when France's ambition is to reindustrialise, it is important that the work of building this bicycle industry be based on the work of the Haut-Commissariat au Plan.

While regaining control of bicycle production, we must recreate a sustainable production sector in which the parts used are recyclable and reusable. There are two major challenges in this sector: the recovery of old bicycles that are no longer in use - more than 10 million unused bicycles lie in French cellars and garages, and 1.5 million are thrown away each year according to Heureux Cyclage - and the construction of batteries that can be repaired at local level. In this context, as the European Union has authorised a reduction in VAT on the sale of bicycles since the end of 2021, a reduction in VAT to 5.5% could be applied to bicycles with a high rate of local manufacturing and integration, above 80%, as well as a high "reparability index".
and a high "reparability index". This VAT modulation would be a relevant price signal for the most eco-responsible products. Responding to this challenge of building an eco-responsible sector also means providing concrete answers to the shortages of raw materials that are ahead of us, particularly aluminium and battery components.

On the other hand, the development of the industrial and economic bicycle sector must be done with the objective of creating a socially virtuous framework. Two points should be emphasised. Firstly, the bicycle represents real employment prospects for people with disabilities and as the sector develops, this perspective must be taken into account from now on. In this context, France Handicap has several projects to open bicycle construction and repair workshops based on the activities of certain French bicycle manufacturers. These projects should be supported and encouraged. Bicycles also represent employment opportunities for people who are vulnerable or far from employment. Agreement projects between industrial groups, local authorities and integration companies should therefore be developed in this sector. Secondly, the bicycle ecosystem, particularly that of bicycle construction and repair, must work to improve the salary conditions of workers and employees in this sector. This is an important condition for its attractiveness and development.

In order to promote the construction of an eco-responsible and socially virtuous sector, a France vélo label should be created to recognise and highlight good practices and better-quality cycling products. This label would be supported by the industry, and would be an indicator for consumers, as well as a brand to support our efforts to promote our cycling industry at European and international levels.

8. BUILD ON THE WORK OF THE HIGH COMMISSIONER FOR PLANNING TO RECOGNISE CYCLING AS A SECTOR OF REINDUSTRIALISATION IN FRANCE
9. PROMOTE A REPARABILITY SCALE FOR NEW BICYCLES. ENCOURAGE REPARABILITY AND RECYCLABILITY BY MEANS OF VALUED INDICES
10. REDUCE THE VAT ON THE SALE OF NEW BICYCLES ACCORDING TO THE REPARABILITY INDEX, AS AUTHORISED BY EUROPE
11. INTEGRATE DISABLED PEOPLE INTO THE BICYCLE INDUSTRY THROUGH EMPLOYMENT
12. CREATE A FRANCE VELO LABEL THAT INCORPORATES EXEMPLARY CRITERIA (SOCIAL, ENVIRONMENTAL AND ECONOMIC)

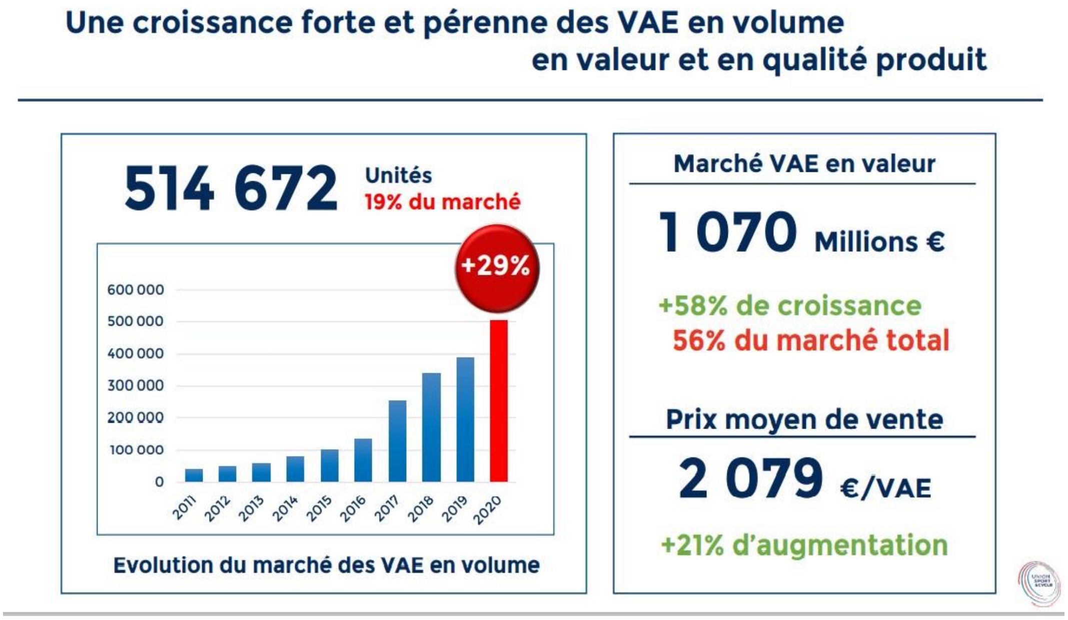
A. An industry facing the challenges of reindustrialisation

Given the increase in the use of bicycles in everyday life and the need for equipment, the challenge is to meet this demand by producing these bicycles in France. We must have this ambition and we must give ourselves the means to meet it.

France produces the equivalent of a quarter of the bicycles sold in France.

In 2020, 2.685 million bicycles were sold in France, for a turnover of the sector of three billion euros. The average price of a bicycle is 707 euros, an increase of 25% compared to 2019, which shows that bicycles sold are moving upmarket. Between 2019 and 2021, the number of EABs sold rose from 400,000 to 700,000. From 2025 onwards, nearly one million will be sold each year (a ratio of 15 ECVs/year/1000 inhabitants, which was the same as in Germany in 2019) and ECVs should account for half of the turnover of bicycle sales. The outlook for the number of bicycles sold, and in particular the number of ECVs sold, is of course totally correlated with the development of everyday cycling in France.

At European level, according to the figures of the European Cyclists' Federation (ECF), the number of bicycles sold should increase from 20 to 30 million units by 2030, including 15 million ECVs, i.e. a ratio of 30 ECVs/year/1000 inhabitants.



Source : Union Sport et Cycle, 2021

In terms of production, 660,690 bicycles were produced or assembled in France in 2020, including 261,000 EABs. This level of domestic production is rising, driven in particular by the EAB, but it is still well below that of the European leaders. France produces the equivalent of a quarter of the bicycles sold in France, but taking into account exports (40% of production) only 3 out of every 20 bicycles sold in France are manufactured in France.
To take up the Shift Project study, the ratio between production and sales volumes is very different from one country to another: France currently produces four times less than it consumes, unlike Italy, Portugal, Germany and the Netherlands. Germany produces half of the bicycles on its market, while the Netherlands and Poland are close to balance on significant volumes (780,000 and 1.2 million bicycles produced respectively).

Source : Union Sport et Cycle, 2021

At European level, 12.7 million bicycles were produced in 2021, of which just under 10% were EABs. This figure should be seen in relation to the total market demand of 20.6 million bicycles, which represents a shortfall of almost 8 million bicycles per year or 40% of the market. With the prospect of the European market increasing to 30 million bicycles sold in 2030, including 15 million EABs, and 5 million bicycles in France at the same time, including more than 1 million EABs, the development of the market is a reality and the challenge of local production is important.

To meet this demand, we need to find the production capacity for the various parts that make up a bicycle today. According to the USC, if all the components can potentially be relocated, they should be prioritised according to :

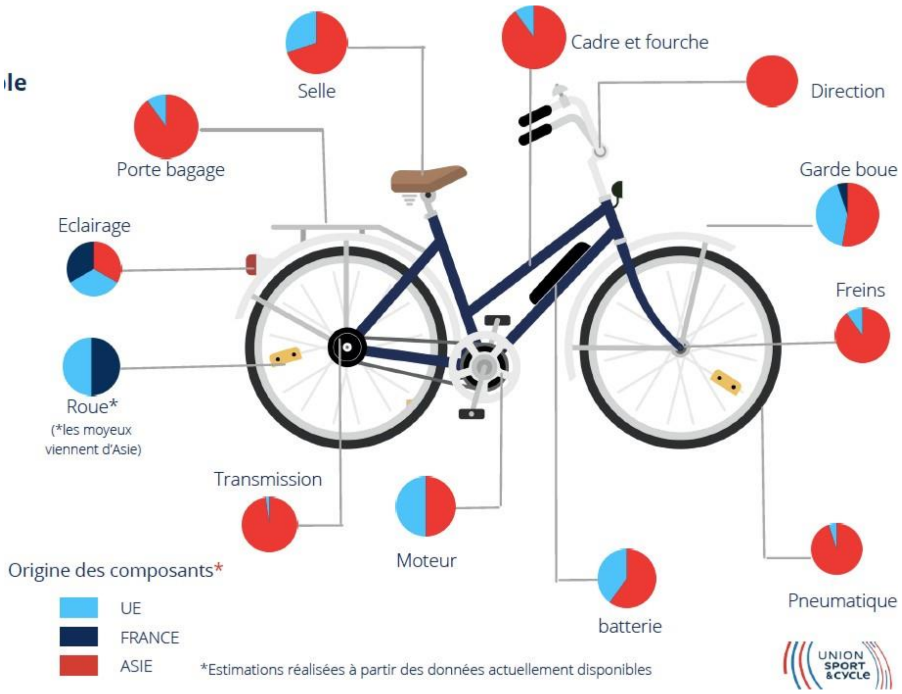
- The cost price of components manufactured in France. Example: the price of a painted and decorated aluminium frame costs around 30 dollars when leaving Asia;
- The carbon footprint of imported components;
- Components from specialised brands that are often unavoidable on the market. I would like to point out that for these parts, a real strategy of relocation to Europe must be proposed to these players in order to convince them to open factories in Europe and to launch local production lines. Business France is currently working on this point, which should be taken into account in the development of our policy for the local reindustrialisation of the bicycle industry;
- The necessary import of raw materials.

As mentioned above, real work must be done to produce bicycle batteries in France and in Europe with a high reparability rate objective in order to build an ecologically virtuous sector. We also need to develop French motorisation systems for EABs and cargo bikes. The work carried out by several French groups, including Valeo, is to be welcomed and encouraged.

13. WITH THE SUPPORT OF BUSINESS FRANCE, IMPLEMENT A NATIONAL ATTRACTIVENESS STRATEGY IN ORDER TO CONVINCE CERTAIN ASIAN MANUFACTURERS TO OPEN PRODUCTION PLANTS IN FRANCE FOR BICYCLE PARTS THAT ARE ESSENTIAL, SUCH AS THE DERAILLEUR FOR EXAMPLE

Responding to this challenge is essential in view of the delays in the delivery of parts from Asia, which greatly complicates production and therefore the acquisition of bicycles, delays that subject our manufacturers to sometimes difficult production rates, obliging them to alternate between periods of high production and periods of technical unemployment. If we look at the details of the parts, here is what we can observe:

- Frame and fork: 90% produced in Asia, 10% in Europe, up to 180 days lead time;
- Steering: 100% produced in Asia, less than 120 days production time;
- Mudguards: 55% produced in Asia, 40% in Europe and 5% in France, less than 120 days production time;
- Brakes: 90% produced in Asia and 10% in Europe, up to 300 days production time;
- Tyres: 95% produced in Asia and 5% in Europe, up to 300 days production time;
- Battery: 55% produced in Asia and 45% in Europe, up to 180 days lead time;
- Engine: produced 50% in Asia and 50% in Europe, up to 300 days production time;
- Transmission: produced 95% in Asia and 5% in Europe, up to 180 days production time;
- Wheels: 50% produced in Europe and 50% in France, less than 120 days lead time;
- Lighting: 30% produced in Asia, 30% in Europe and 30% in France, less than 120 days production time;
- Luggage racks: 90% produced in Asia and 10% in Europe, no information on production time.



Source : Union Sport et Cycle, 2021

As regards employment in this sector, the bicycle industry employed just under 2,000 people in 2016, a low level to be put into perspective with regard to employment and production volumes in France and Europe. Although employment in the bicycle industry has been rising slightly since 2013, it still only represents 5.6% of the European total of 45,000 people at that time. And for good reason, French production also represents only 5.7% of the European total in volume with 720,000 bicycles produced out of 12.7 million - compared to 2.3 million in Italy, almost two million in Germany, three million in Portugal. These countries employ 5,700, 9,500 and 5,200 people respectively

These countries employ 5,700, 9,500 and 5,200 people respectively, with the best ratio of jobs to production volume going to Germany (around 4,800 jobs per million bicycles produced), with Italy and Portugal at around 2,500 and France in the middle of the 3,500 range.

Visit of the bicycle industry in Portugal

As part of this mission, I made an all too brief but enlightening visit to the Portuguese bicycle industry on 23 and 24 November 2021, accompanied by Florence Mangin, our French ambassador in Lisbon.

This trip was organised in coordination with the French Embassy and Business France. I invited a delegation of French cycling stakeholders to take part in this visit: FUB, USC, APIC, the club of elected representatives and cycling territories, Business France, ADEME and the interministerial coordinator for the development of cycling. We went to the heart of the system, directly to the Agueda Valley, where we were able to meet with industrialists (RTE, Triangles, Miranda) and their association Abimota.

We have noted a few specific points that seem to characterise the Portuguese bicycle industry ecosystem:
- An essentially industrial approach: in a region with no particular history of either cycling or the bicycle industry, industrialists have been able to seize opportunities (initially, a need for frame painting at RTE, and low-cost bicycle assembly for free-floating players). The bicycle is a real industrial product among others, and not the object of a company director's passion;
- A strong subcontracting effect: today 55% of the 3 million bicycles produced in Portugal are for Decathlon; technical innovation comes from Decathlon's design offices, and it is up to the Portuguese manufacturer to innovate industrially;
- Large volumes with increasing automation, but also the acceptance of specific working conditions, with a lower hourly cost than in France;
- An industry that invests massively in its modernisation, to remain competitive, and knows how to use European subsidies (up to 50% for certain investments);
- Technological successes that we were told were impossible in Europe, such as the manufacture of aluminium frames;
- A capacity for local sourcing of raw materials, including local production of aluminium (some of which is recycled);
- A grouping effect in a "Bike Valley": beyond the competition, the companies mention the cooperation linked to proximity, and their professional union Abimota offers R&D services, a test laboratory, and promotion of the brand (Portugal bike Value), in particular during international trade fairs, consolidating the reputation of the Portuguese industrial sector on an international level.

The growth of the sector and our knowledge of the players leads us to believe that in 2021 the bicycle industry will employ 4,000 people. In France, the number of jobs in the bicycle industry could be 20,000 in 2030 and 45,000 in 2050 according to the projections of the Shift project (see dedicated sheet). However, we must be careful not to reduce the question of employment in the bicycle sector to the industrial part of bicycle manufacture alone, and to take into account all the activity that the bicycle can generate in services to the user and consumer. The increase in the number of bicycles manufactured in France and the rise in the number of bicycles sold in France will have an impact on the services provided to users and consumers.

manufactured in France and the increase in cycling could have a particularly significant impact in the order of more than 100,000 jobs created by 2050.

What are the obstacles to our industrial development?

During our work, our travels and our exchanges, we identified a certain number of barriers and difficulties that our companies are encountering today:

- A global shortage of components and raw materials resulting in a substantial increase in delivery times and consequently critical working capital and cash flow problems, compounded by a sharp increase in material costs;
- A chronic deficit of capitalisation due to the reluctance of investors in the field of industry, especially in a sector with still low margins;
- The European ecosystem needs to be rebuilt and the French industry has a very short window of opportunity to find its position and take part in this adventure;
- Thousands of patents exist in all fields (braking, transmission, rims, steering, saddles, engine, battery, etc.) that should be studied in depth on a case-by-case basis;
- Diffuse manufacturing volumes and a strong heterogeneity of manufacturing standards to the detriment of price competitiveness;
- The majority of customers, who used to be sportsmen and enthusiasts, no longer look for specific components but now trust the brand with three major expectations: quality, reparability and after-sales service. The world of cycling is becoming more like that of the automobile in its operation, leaving an opportunity for the standardisation of components;
- Standards and homologation rules that are still unclear, which can be detrimental to the quality of products and the safety of users;
- Industrial tools (machines, resources, human resources, factories) often out of reach in the pre-industrialisation phase but also in the development phase of the activity;
- The scattering of actors in the sector, who are numerous but poorly organised, and who do not work together very much, particularly on the common difficulties they may encounter. This scattering and division can give the impression that there is no real ecosystem at national level.

On each of these points, answers can be provided. I propose that they be organised around seven areas of work, which are of course not exhaustive.

Cycling in the France Recovery Programme

Launched in September 2020, the recovery plan focused on recovery and preparing for the future aimed to create 160,000 jobs in 2021 and to turn the French economy around. It provided for €100 billion targeted on three priorities: ecology, competitiveness and cohesion. As we have seen, the bicycle fits precisely into each of these three areas and benefits from several highly targeted measures.

Under the ecology section[3] (30 billion euros), the plan provides for the development of public transport and the use of bicycles for 1.2 billion euros. More specifically, 200 million euros of investment in active mobility is budgeted. On the one hand, 150 million euros have been added to the 350 million euros announced in 2018 for the active mobility fund. Of this €150 million, €100 million will be devoted to cycling facilities and €50 million to secure bicycle parking in stations, to encourage train/bike intermodality. This additional €150 million will be committed in 2022.

In addition to these specific measures, the proposed calls for projects such as "Entreprises Engagées pour la Transition Ecologique", "Territoires intelligents et durables", "Industrie du futur" and "Logistique 4.0", which aims at the transition to ecologically sustainable logistics chains, can benefit the development of cycling. According to the Ministry of Industry, €3.9 million has been allocated to cycling companies under the Recovery Plan in 2021.

[3] One of the first examples of recycling put forward by the France relance website is that of the manufacture of leather goods-type bags from ... bicycle inner tubes!

In addition, the bicycle, like other industries, benefits from an exceptional window of opportunity to fight against products imported from far away, created by the singular increase in the cost of maritime transport, the strong growth in demand for these products, and the proliferation of initiatives in the regions, driven by the opportunities for innovation offered by new technologies.
- The competitiveness section (35 billion euros) proposes measures aimed at industrialists, obviously accessible to those in the cycle sector: lowering production taxes, strengthening the equity capital of VSEs, SMEs and ETIs, aid for the relocation of industrial production in the regions, for the digitisation of VSEs, SMEs and ETIs, support for export prospecting, but also support for industrial sectors implementing high-potential technologies;
- Among the measures in the territorial cohesion section (also 35 billion euros), various points such as support for local authorities4 , aid for the recruitment and training of young people under 26 and people with disabilities, and training for young people, especially the least qualified, in strategic sectors, support for young people under 26 and people with disabilities, training for young people, especially the least qualified, in strategic sectors, support for employment, strengthening the skills of the active population, support for initiatives that create activities and development in the regions, such as regional factories or third places (250 million euros), are all measures that can directly benefit the players in the French cycling ecosystem.
It is regrettable, however, that cycling is not identified as a clear priority in the Recovery Plan in terms of reindustrialisation.

Arcade, a new factory in Vendée in 2024
Arcade, a company specialising in the assembly of bicycles for hire (VLS/ LLD, tourism) has decided to invest in a new factory in La Roche-sur-Yon. Indeed, with the growth in activity and turnover of 50% over the last two years, their production capacity is close to saturation. This €15m investment on a hectare of land - which should make it one of the most important industrial investments in the sector for the coming years - will double its production capacity and create more than 60 direct jobs.
The company does not anticipate any difficulties in financing this project due to the growth prospects of the VAE over the next ten years.
The new factory is due to open in January 2024 and will increase production from 60,000 to 150,000 bicycles, with the possibility of expansion to 180,000 bicycles.
This project is a good example of a cycle company investing in the modernisation of its production equipment and manufacturing processes. For the managers of Arcade, there is no better time to invest.

Seven areas of work to develop the industrial sector

In order to promote the industrial development of the bicycle industry, which will enable us to produce more bicycles in France, I propose seven areas of work.

- Supporting the development and modernisation of production equipment and enhancing the value of industry

We need to strengthen support for the development and modernisation of production equipment and the promotion of industrial employment, which are objectives for the reindustrialisation of our country in general. To achieve this objective, we must have factories equipped with the most modern production tools and robots possible. We must also have employees who want to train to come and work there and build their careers. The trip to Portugal, but also the one to SEB near Dijon, showed the importance of strengthening investments in our factories and not only in innovation.

In this context, we need to facilitate access to financing for our industrial players with financial institutions and facilitate their dialogue and working relationship with our public authorities, who are putting in place various tools to support the reindustrialisation of our country. On this last point, a bicycle mission could be created either at the Ministry of Industry or at the BPI, so that the players have simplified contact with the State and reinforced support for their development projects.

4 Actions Cœur de ville for the creation of repair workshops, Small towns of tomorrow programme. See www.economie.gouv.fr/plan-de-relance/profils/entreprises/soutien-entrepreneuriat-territoires-fragiles

During our visits, we regularly met actors who said they did not know who to contact to request financial support for the development of their production tools, which should not continue.Organiser la filière vélo

Working on the organisation of the sector in order to put an end to the scattering of players and their divisions requires the organisation of the sector at national level through the creation of a sector committee that will bring together all the players in the bicycle sector and not just the industrial players. I will come back to the creation of this sector committee in more detail in the fifth part of this report.

The organisation of the sector also involves the organisation of players at a territorial level with the construction of several regional clusters bringing together local players in order to identify common problems and collective solutions. Three clusters are already clearly identified. Two are well established, the MAD cluster in the Auvergne Rhône Alpes region and the Vélo Vallée du Gers in Occitanie. A third,
"Loire à vélo 2030", is currently under construction between the Centre Val-de-Loire and Pays de la Loire regions. The creation of a fourth cluster within the Grand Est region could make sense.

Finally, on the industrial level, this involves the creation of tools and mechanisms for intra-sector groupings through the creation of cooperatives, order groupings or temporary groupings of companies to massify the production of certain components or respond to calls for tender. These mechanisms should enable us to provide concrete solutions to the fragmentation of French bicycle production and the scattered orders for Asian players, orders which could instead be organised to be sent to French or European industrial players.

- Mastering new bicycle technologies

The bicycle is a technology that is constantly evolving. Bicycles are becoming more and more electrified and connected. It is vital that our bicycle industry has a command of these new technologies. It is also important for our industry to work in partnership with other sectors - automotive, aeronautics, digital, renewable energies - to create and develop the bicycle technologies of tomorrow. There will be no shortage of technological breakthroughs in cycling and France has the means to contribute to them. However, real thought must be given to patents and their protection in order to have the most demanding industrial intellectual property protection policy possible.

- Developing a sustainable industrial sector

In view of the challenges of supplying raw materials and spare parts, the bicycle industry must develop by taking into account the challenges of reparability and the reuse of parts and materials. This reflection must be at the heart of the projects carried out by each industrialist but also by the sector and the various territorial clusters. In addition, a real second-hand market, based on the model of what exists in the automotive industry, must be encouraged. I will come back to these issues in more detail in the third part, which is dedicated to the players in the services developed around the bicycle and its use.

- Standardise the production of certain components

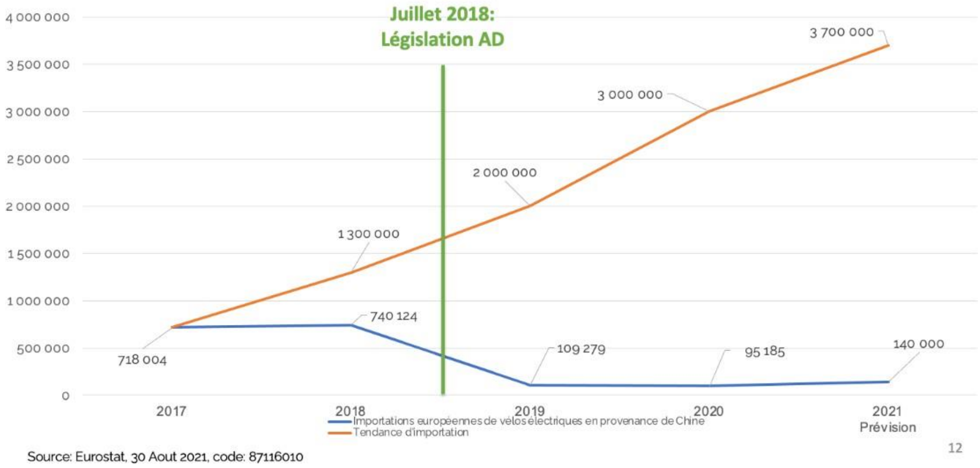
It is advisable to seek the standardisation of certain parts with an objective of quality and reparability. This work must lead us to work on reference systems, standards, tests, approvals and patent protection with a strongly assumed and politically supported industrial development logic.

- Develop cross-functional work

Sixth, develop links and connections with other industrial sectors, particularly the automotive and aeronautical sectors. A certain number of bicycle parts and technologies can be manufactured by the equipment manufacturers of these two other sectors, which would have everything to gain by diversifying their economy. Several players are currently participating in the creation of these bridges, such as Valeo, Actia, Savoy International and the Bontaz group. Relevant tools exist, such as regional challenges based on the model of the New Energies Sector Committee (see insert at the end of the report).

- Maintain European regulations and promote the sector internationally

Seventh, maintain European regulations to protect against social, economic and environmental dumping. Until now, anti-dumping measures have protected the European cycle market. It is important that these measures are maintained. Bicycle production in France and in the European Union has been protected by anti-dumping measures imposed since 1993 on bicycle imports from China. These measures have been extended since 2013 to other countries (Indonesia, Malaysia, Sri Lanka, Tunisia, Cambodia, Pakistan and the Philippines) and to other products, including electrically assisted bicycles. The measure consists of the application since 2013 of a 48.5% tax on mountain bikes, folding bikes, BMX bikes, children's bikes, VTCs, city bikes, touring bikes and, since 2018, EAVs, coming from factories identified by the Chinese government.



Source: The effectiveness of trade protection, EBMA

These anti-dumping measures have proven their relevance in protecting our cycle actors, and could also be quickly accompanied by other protective measures, such as the implementation of a carbon tax at the borders.

Furthermore, in order to promote the sector internationally, a French brand or label should be created. I was able to observe in Portugal that, in addition to a real industrial organisation, the presence of a 'Bike Value' brand provided real visibility internationally and was a significant factor of attractiveness. We should develop the same logic in France with the creation of the France vélo label.

14. PROMOTING INDUSTRIAL EMPLOYMENT AND SKILLED TRADES

15. ACTIVELY MODERNISE INDUSTRIAL TOOLS: FACILITATE THE FINANCING OF BICYCLE FACTORY INSTALLATIONS AND EQUIPMENT, SET UP A PUBLIC POLICY WITH THE BPI TO SUPPORT THE BICYCLE INDUSTRY

16. CREATE A BICYCLE INDUSTRY COMMITTEE OF ECONOMIC PLAYERS IN THE BICYCLE SECTOR

17. ENCOURAGE AND SUPPORT THE CREATION OF REGIONAL CLUSTERS

18 .IMPLEMENT A PROACTIVE AND EFFECTIVE POLICY TO PROTECT INDUSTRIAL AND TECHNOLOGICAL PATENTS IN THE BICYCLE INDUSTRY

19. WORK TOWARDS THE STANDARDISATION OF CERTAIN BICYCLE PARTS AND COMPONENTS

20. INTEGRATE THE PRODUCTION OF BATTERIES FOR BICYCLES INTO THE CURRENT BATTERY ACCELERATION STRATEGY

21. DEVELOP TOOLS TO STRENGTHEN INTRA-SUBSIDIARY WORK: CREATION OF COOPERATIVES, ORDER GROUPINGS OR TEMPORARY GROUPINGS OF COMPANIES TO MASSIFY THE PRODUCTION OF CERTAIN COMPONENTS IN FRANCE

22 .DEVELOP TOOLS TO ENABLE INTER-SUBSIDIARY WORK (PARTICULARLY WITH THE AUTOMOTIVE, AERONAUTICS, SCREW-CUTTING AND ELECTRONICS INDUSTRIES); SET UP REGIONAL CHALLENGES; STUDY AND FINANCE OPPORTUNITIES TO CONVERT EXISTING PRODUCTION LINES FOR BICYCLES

23. AT THE EUROPEAN LEVEL, PURSUE THE ANTI-DUMPING POLICY AND IMPLEMENT THE CARBON TAX AT THE BORDERS

24. WORK WITH BUSINESS FRANCE TO SET UP A FRENCH CYCLING TEAM AT INTERNATIONAL TRADE FAIRS USING THE FRENCH CYCLING LABEL FRANCE VELO

FOCUS ON EMPLOYMENT IN THE BICYCLE INDUSTRY

How many people work for cycling in France today? How many people will be working for cycling in the future?
Data on jobs in the bicycle industry are difficult to consolidate because they are not well documented statistically if we consider the entire industry. For example, the 100 companies that replied to our survey fall under a dozen NAF codes.

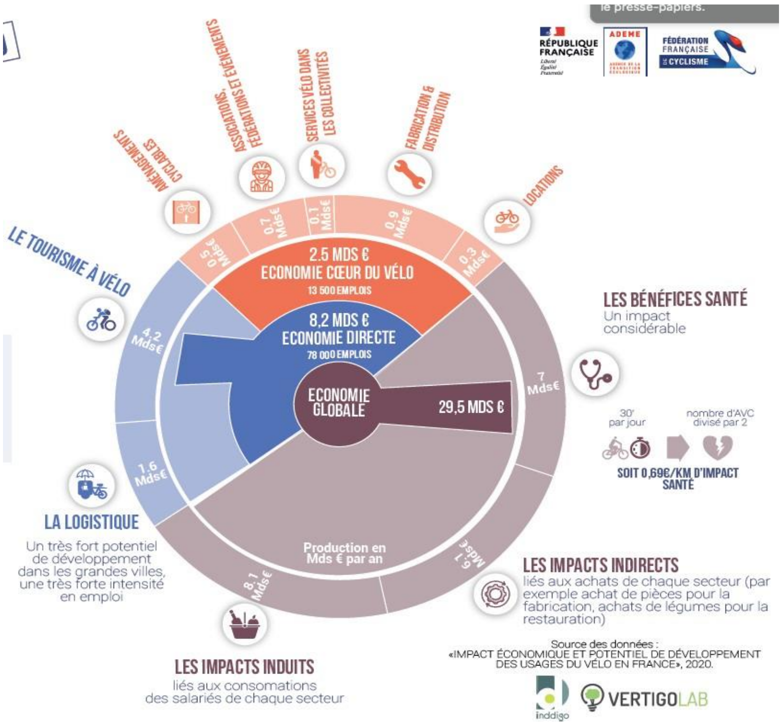
State of play in France before the health crisis

The Impact du vélo study reports 13,500 "core business" jobs in cycling.

Depending on the source, between 1,800 (in 2016) and 2,000 jobs were recorded in the cycle industry (assembly and components), bearing in mind that the study based on NAF codes is complex, due to the absence of dedicated NAF codes (the same code covers the production of bicycles and vehicles for PRM).

It is estimated that there are currently between 3,000 and 4,000 jobs in the cycle industry, given the growth of the sector in recent years.

The industry's share is therefore rather minor today... in the bicycle sector.



2016 figures from the Impact of Cycling study based on available NAF codes

- 1,788 in industry (assembly and components)
- 3,700 in sales and repair
- 2,400 in infrastructure and parking
- 1,200 in local authority cycling policies
- 1,600 for rental
- 2,257 for associations, sport and related events

The same study indicates a total of 78,000 jobs in the bicycle economy, with 32,000 jobs in logistics and 34,000 in tourism.

For the time being, the bicycle industry as such is not very significant in terms of jobs.

European comparisons

The bicycle industry employed just under 2,000 people in 2016 in France, out of 45,000 people at European level, i.e. 5.6%. And for good reason, French production also represented only 5.7% of the European total by volume, with 720,000 bicycles produced out of 12.7 million At the same time, Italy had 5,700 jobs, Germany 9,500 and Portugal 5,200.

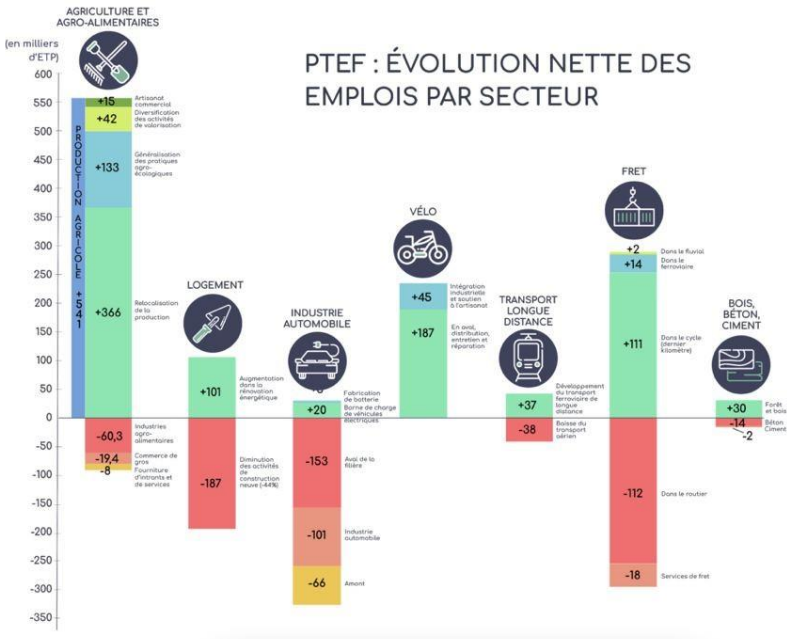
Job prospects

All of the companies we met in the cycling sector are currently recruiting. Cycling is a booming employment sector.

As part of its work on "employment as a driver of the low-carbon transition", the Shift Project has carried out projections for direct industrial jobs and downstream service jobs (sales and repair). Their hypotheses are ambitious since they consider that 25% of daily travellers would be using bicycles, electric bikes or two-wheelers in 2050. They also consider that the French industry would make ambitious choices to relocate the bicycle industry, in order to produce more quality bicycles and electric bicycles. In their view, we could have 45,000 jobs in the bicycle and ECV industry in 2050 and 232,500 in trade, maintenance and repair, i.e. +187,000 in downstream jobs. This corresponds to twenty times as many jobs in the industry and ten times as many in downstream jobs that cannot be relocated as today. It should be noted that their analysis does not take into account jobs linked to cycle tourism.

Activité	**Emploi avant transformation (ETP)**	**Emploi 2030 (ETP)**	**Emploi 2050 (ETP)**	***Évolution nette à 2050 (ETP)***
Construction de vélos	1 750	7 636	13 867	*12 117*
Construction de VAE	241	13 659	33 634	*33 393*
Total emplois directs	**1 990**	**21 295**	**47 500**	***45 510***
Commerce, entretien et réparation de vélos et VAE	16 842	89 825	203 789	*186 947*
Total	**18 833**	**111 120**	**251 290**	***232 457***

Tableau 13 : Besoin en emploi à 2030 et 2050 résultant des transformations de l'industrie du vélo/VAE

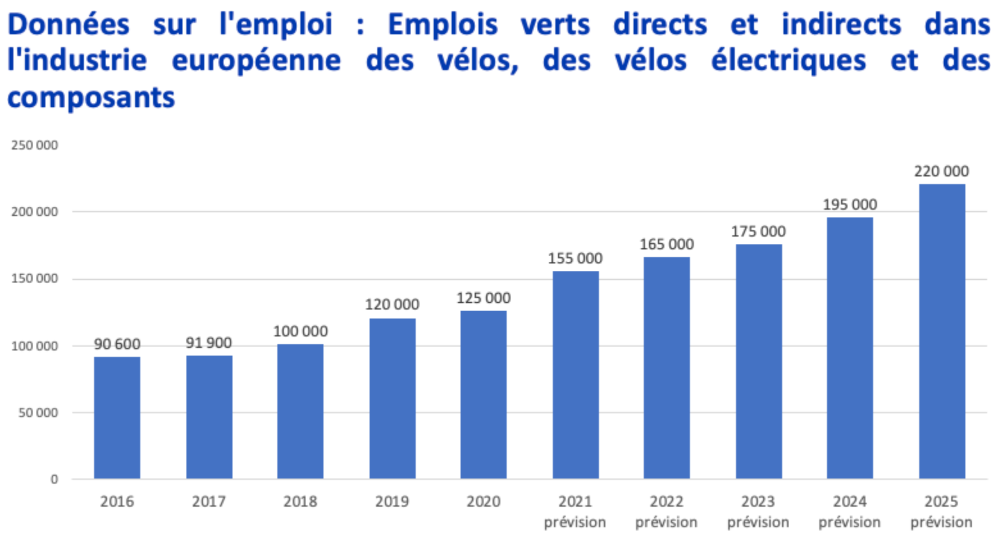


Source : Shift project

Their analysis is placed in a broader context with a drop of almost 300,000 jobs in the automotive sector. The training needs to enable the conversion of employees from one sector to another are therefore glaring.

European outlook

European-wide projections for short-term job growth are similarly very important. The 1,000 sustainable SMEs and 155,000 green jobs in the cycling sector are fully in line with the European Commission's Green Deal strategy. The work foresees the development of over 155,000 direct and indirect green jobs (80,000 direct and 75,000 indirect in the upstream industry).



source : Conebi

3. CYCLING IS ALSO A SERVICE, LOGISTICS AND TOURISM ECONOMY

A. Cycling as a service

The development of cycling in France cannot be achieved without the deployment of cycling services. There are many such services: cycle sales and repairs, cycle hire, whether self-service, long-term or leasing, secure parking, and all the new services associated with cycling, particularly digital. They are an essential link, often very closely linked to the industrial players: after-sales service is essential, even more so for ECVs whose repairs are more complex. The choice of self-service bicycle fleets or leasing is the subject of exchanges between service providers, local authorities and manufacturers, with the important lever of public orders. All of these services have been deployed in a very dynamic manner, as shown by the recent ADEME study on the evaluation of bicycle services (September 2021), with a doubling in the number of services in most categories of service over the last five years. The effectiveness of cycle services in facilitating access to cycling and establishing cycling as a mode of transport is well confirmed.

Bicycle shops, sales, repair and maintenance

With the growth in the sale of bicycles, their quality and the average selling price, bicycle shops are growing strongly in France. Mobilians (formerly CNPA) estimates that there are currently between 2,500 and 3,000 cycle shops, many of which also offer repair and maintenance services (NFA figures, which are probably fragmentary). These figures do not take into account the medium and large specialist shops. For example, Decathlon has 330 shops each with a repair workshop and has a network of ten regional repair workshops for major repairs. In Paris, between 2017 and 2020, there will be 38 new bicycle sales and repair shops, i.e. 30% more in three years. There is also the sale of cheap bicycles in large food stores, a practice that is tending to diminish.

Source : Union Sport et Cycle, 2021

According to figures from the Chamber of Trades and Crafts, the repair sector (excluding car repairs) represents more than 100,000 craft businesses, including 4,500 bicycle repair structures. Between 2018 and 2021, the number of bicycle repair businesses registered in the national trade register will double. It should be noted that in 2020 alone, 35% more "repairers" have been registered under the "Coup de Pouce" bicycle scheme.

As mentioned above, it is difficult to have an accurate count of bicycle repair services as there are no dedicated NAF codes. For example, NAF code 9529Z covers the repair of personal and household goods. The NAF code for bicycle shops does not distinguish between bicycles and motorbikes.

According to the various existing studies, bicycle shops represented around 3,700 jobs in 2016. Certainly many more today and potentially even more tomorrow, if we are to believe the projections of the Shift project (see Employment insert). In the Shift project's scenarios of 230,000 jobs created on the cycling side, more than three-quarters of them come from downstream, services and distribution.

In addition to bicycle shops and specialised superstores, we should also mention the contribution of participatory bicycle workshops, brought together within the Heureux Cyclage network. There are 339 workshops throughout France, compared to 86 in 2015, which represents 200 jobs in bicycle workshop management, mechanics, training, and many more volunteers. Their specificity is to promote the re-employment and to develop in less densely populated areas where a bicycle shop would not necessarily be able to set up.

Making repair profitable

For a long time, bicycles appeared to be a common, disposable consumer good. With the shift towards cycling as a mode of daily transport, cyclists are more likely to buy a higher quality bicycle, whether conventional or electrically assisted. This increase in the value of the bicycle is not yet reflected in the investment in maintenance. As a result, for a number of players, the bicycle repair business is not yet profitable. However, the challenge of road safety also requires good equipment and maintenance of bicycles, especially for ECVs. If we consider the bicycle as a means of transport, it is essential to have well-trained repairers. This is why we feel it is important to make it compulsory for a bicycle repairer to have at least a CQP within the team of a bicycle shop. The professionalisation of the sector requires recognition of the increasing complexity of maintenance and repair for increasingly dense uses with very diverse bicycles.

The positive communication campaign around bicycles that we want to see must include a message on the need for maintenance and the promotion of cycle repair jobs. This is all the more important as many people can be expected to switch from the automotive sector to bicycle repair. Mobilians has noted the growing interest in bicycles on the part of those involved in automobile mobility. Garages are creating corners for bicycle repair. A new network of bicycle services, particularly in urban areas, could rapidly take shape. Norauto made this choice a few years ago by creating an active mobility corner in its shops and developing cycle repairs. We can also see that the job of bicycle mechanic responds to the search for meaning by certain professionals.

How Norauto is choosing to cycle

The Mobivia group, the European leader in multi-brand car maintenance with nine brands (Norauto, Midas, ATU, etc.), has been committed since 2010 to transforming its historical activities to include new sustainable and low-carbon mobility. In this context, Norauto's car maintenance centres are diversifying and offering the first Wayscral electric bicycles (160,000 bicycles sold in 10 years), the assembly of which has been repatriated to Europe in 2020. They are expanding their range of "soft mobility" products by welcoming classic bikes, scooters and accessories.

To date, 72 Norauto shops have a "soft mobility" area, and by the end of 2022, 200 of the 400 Norauto shops will have an area dedicated to cycle maintenance and repair. Other services are also being developed in parallel: the rental of bicycles, the electrification of bicycles, the reconditioning of batteries and the sale of second-hand bicycles. The retraining of mechanics is mainly done through in-house training.

In February 2022, Midas will open its first "Mobilité deux roues" concept in the centre of Lille.

Just like a reduced VAT on the sale of bicycles, we agree with the request for a 5.5% VAT on cycle repair with the aim of encouraging and promoting these local activities. The national strategy for the circular economy desired by the Government, the bicycle plan, and the gradual change in consumer behaviour provide an opportunity to support these changes by promoting repair rather than the purchase of new products.

Extending the life of products is indeed recognised as a major axis of sustainable development. Repair extends the useful life of the product and prevents the generation of waste; it limit the purchase of products that are often imported from countries with low labour costs; provide local services to the population and create jobs in local areas that cannot be relocated. European Council Directive 2006/112/EC of 28 November 2006 on the common system of value added tax (VAT) already allows for the introduction of a reduced rate for cycle repairs in France (Article 106 and Annex IV). Seven EU countries have since adopted a reduced VAT rate for this activity, ranging from 5% to 8% (Belgium, Sweden, Luxembourg, Malta, the Netherlands, Poland and Portugal).

Operation Coup de pouce Vélo
It is estimated that 30 million bicycles lie dormant in French cellars and garages: the aim of Coup de pouce vélo was to get them back on the road. 4,300 bicycle repairers signed up for the scheme and repaired around 1.7 million bikes. More than a million French men and women have thus benefited from the Coup de pouce Vélo scheme according to the FUB survey. They are spread throughout the country, with the majority in towns with more than 100,000 inhabitants (57%). Only 15% of beneficiaries live in towns with between 20,000 and 100,000 inhabitants and 28% live in towns with fewer than 20,000 inhabitants. The modal shift towards cycling has been greatly encouraged by the Coup de pouce Vélo scheme, since 52% of those surveyed now cycle more often and, above all, 53% of them use another mode of transport less. Thus, 36% use their car less often and 44% use public transport less often.

How can the momentum of the Coup de pouce Vélo be continued in a more targeted way? One tool could be the mobility voucher, which was introduced for employees' home-to-work journeys, based on the model of the meal voucher in December 2021. This is a voucher issued by companies in dematerialised and prepaid form. Employees will be able to pay for travel expenses between home and work. Eligible costs for active mobility include the purchase of bicycles (mechanical and assisted), their maintenance, insurance and parking costs, as well as the rental and purchase of equipment.

25. INTRODUCE A 5.5% VAT ON REPAIRS

26. MAKE IT COMPULSORY TO HAVE A CYCLE CERTIFICATE TO RUN A CYCLE SALES AND REPAIR SHOP

27. CONTINUE THE MOMENTUM OF THE "COUP DE POUCE VELO", FOR EXAMPLE THROUGH THE MOBILITY VOUCHER AND THE REPAIR FUND SET UP AS PART OF THE EXTENDED RESPONSIBILITY OF PRODUCERS IN THE BICYCLE INDUSTRY

Promoting reparability and structuring the second-hand market

Changes in cyclists' uses and expectations, as well as the diversification of types of bicycle and policies in favour of recycling, are leading us to think about how to better structure the second-hand bicycle market. Bicycles have always been repairable objects, and they must remain so, even though they are becoming less and less low-tech and more and more electronic. Bikes that were put on the market ten years ago are not necessarily repairable today, unlike bikes from fifty years ago. Many bicycles are destined for destruction each year (1.5 million according to Heureux Cyclage). The extension of Extended Producer Responsibility (EPR) to sporting goods in 2022 will lead to major design changes among manufacturers, which must be supported in a context of raw material shortages.

With a view to promoting quality, the players would like the sector to work on the eco-design of products, which allows for re-use and the long-term availability of parts and tools, to guarantee reparability. Discussions could also be launched to have slightly more uniform standards and maintain repairability. One of the factors that limit the profitability of cycle repair today is the absence of standards, which imposes a significant amount of work in sourcing parts.

One subject specific to the ECV is the battery: on the side of motorised two-wheelers, work at European level is underway. The main brands have agreed on an interchangeable battery model for electric scooters. There is an urgent need to work at the industry level on the standardisation of bicycle batteries, and first and foremost on chargers.

Doctibike, the challenge of recycling batteries for EABs
Doctibike is a company based in Lyon, within the MAD cluster, specialising in the field of electrically assisted bicycle batteries and soft mobility, which offers the repair, diagnosis and reconditioning of electric bicycle batteries. Its core business is to refurbish batteries at the end of their life and also to ensure perfect compatibility with its customers' bikes. In 2021, its team of qualified technicians gave new life to 15,000 batteries guaranteed for two years. Doctibike is growing by around 80% and employs more than 15 people.

The potential for recycling that cannot be relocated is enormous: to date, 75% of the batteries in a recycling drum are in fact repairable, but it is very complicated to send used batteries to another country because of safety issues and waste transport standards. Doctibike recognises the absence of a standard for batteries and the need to lobby in this direction, particularly in Brussels. Its director would like to see the development of a repair index for electric mobility. What is a good bike? A battery that can be easily repaired and recycled? This is a major issue in the second-hand market.

The second-hand bicycle market is very important in France. According to data from L'Heureux Cyclage, 23% of bicycles are bought via the second-hand market, i.e. 1.3 million bicycles each year. However, this market is not structured: the methods of resale are most often informal, between friends and family, or via association bike exchanges, second-hand sales outlets such as Emmaus, and increasingly on websites such as Le Bon Coin. There is no real bicycle auction, despite certain initiatives (the VAE auction at Norauto, the website https://cote-velo.fr, the beginning of the listing of electric bikes on Backmarket, etc.). The obligation to take back bicycles under the law of 10 February 2020 on the fight against waste and the circular economy will accelerate the need for structuring.

The introduction of cycle identification by APIC - the association for the promotion and identification of cycles - could be coupled with a bicycle maintenance booklet, particularly for EABs, which would make it possible to monitor bicycles and provide elements for the creation of a quality second-hand market.

28. IMPLEMENT A REPARABILITY INDEX TO INCREASE THE REPARABILITY OF COMPONENTS AND PREVENT PROGRAMMED OBSOLESCENCE

29. STRUCTURE A SECOND-HAND BICYCLE MARKET

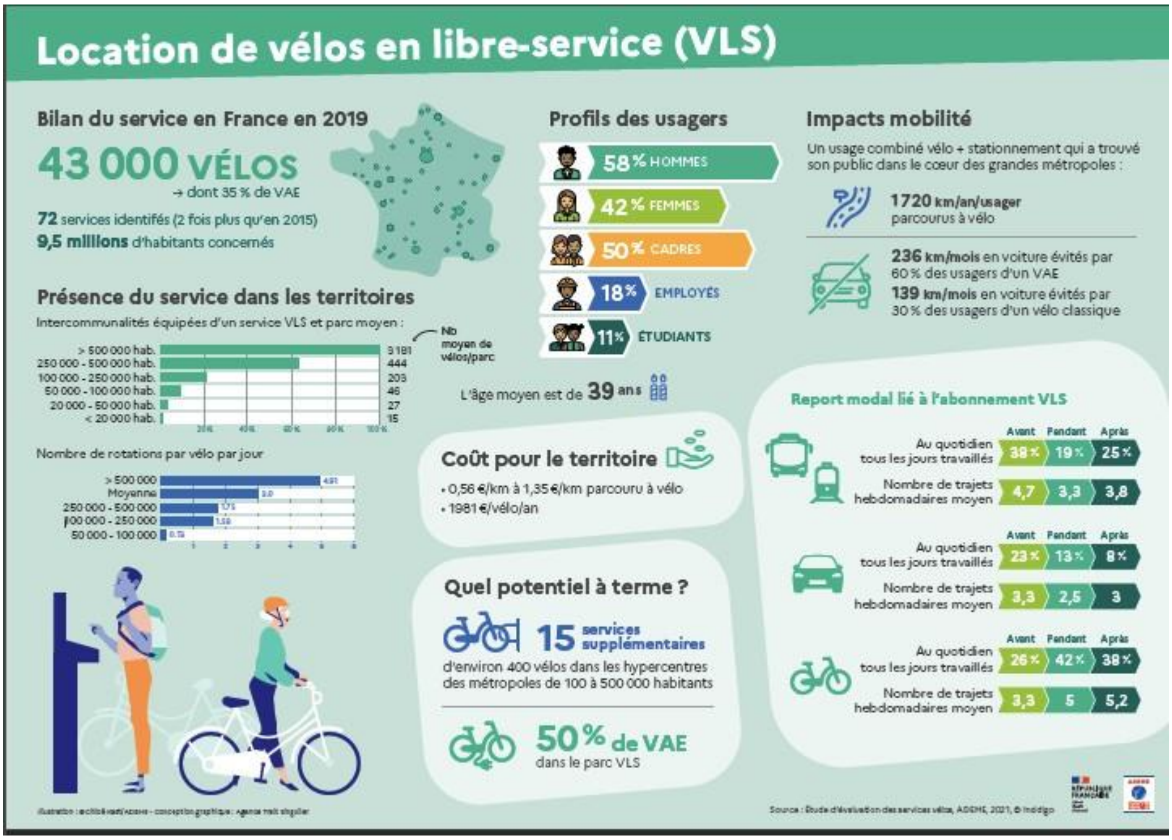
The issue of electrification kits
A conversion kit turns a simple bike into an electrically assisted bike. In theory, all you have to do is install the motor, battery, controller and display that make up the kit and you can ride your old bike effortlessly, and without breaking the bank. But the subject is not so simple. These kits are of interest to cyclists who are good at DIY because they allow them to use their own bike, which avoids having to buy another one, especially when you have a model that is well adapted to your morphology. But not all bikes can accept kits. What are the impacts on the wheels, brakes and frame? Most bike shops refuse to install them. A bike must meet certain standards to be marketed. A bike fitted with an electrification kit is not approved, which poses a problem in the event of an accident. I think that further work is needed on this subject.

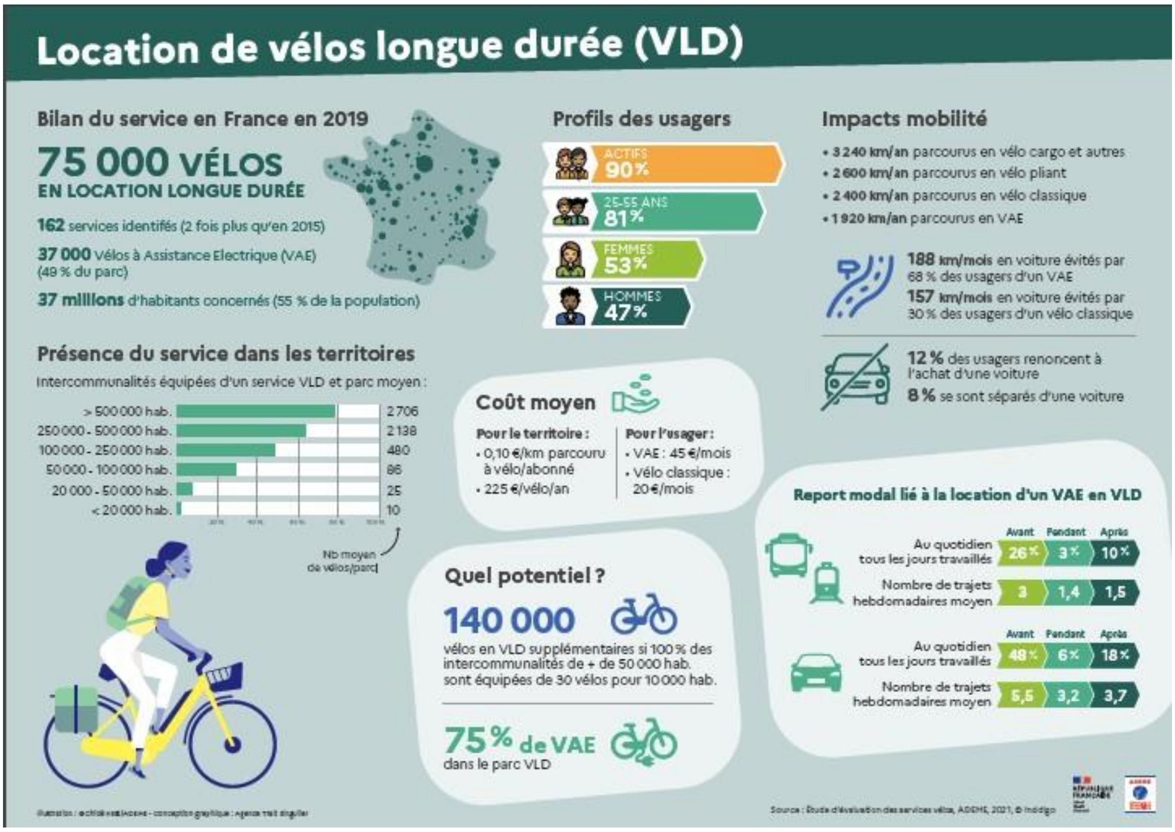
Cycle hire

Cycle services are booming. Bicycle rental services have recorded double or triple digit increases: +86% for long-term rental bicycles (LTV) and +87% for self-service bicycle hire between 2015 and 2020. A specific ADEME study on bicycle services highlights the particular popularity of long-term rental because of the ability of these services to be deployed in various areas, to reach new audiences and to generate modal shift.

Long-term rental services (LTV) obtain the best results in terms of demotorisation, with 13% of users giving up the purchase of a car and 12% giving up a car. How can this be explained? First of all, HDVs are set up in all types of areas, including the less densely populated ones where motorised mobility is more important. They are very often electric bicycles, which are more attractive to new users, car drivers and public transport users. HDVs attract more women, families with children and working people aged 35 to 55 than self-service bicycles (SSBs). At the same time, leasing offers are being developed for companies and local authorities. Cycling as a service" therefore includes the issue of integrating maintenance into the service. This is a strong lever for the bicycle industry, since public tenders often include a section favouring French or European bicycle manufacturing.

30. PROMOTE ASSEMBLED BICYCLES IN FRANCE IN PUBLIC TENDERS FOR LVL AND LLD SERVICES





Source : ADEME

New digital services and the challenges of data

To remove the obstacles to cycling, to fight against theft and security, answers can come from digital technology. For the development of new digital services, bridges between hardware and software need to be developed: on-board navigation on tomorrow's bicycles, GPS trackers, chips associated with bicycle identification, bicycle diagnostics for maintenance, etc. This represents a high potential for innovation and employment. This represents a strong potential for innovation and employment. The Angell bike is a good example of the digital services that can be integrated into a bicycle: fall detector and alert, anti-theft alarm and anti-theft location (even without a battery), locking/unlocking, possibility of different user profiles to set route choices, etc.

Data and maps

In order to support new cyclists and reduce the feeling of insecurity, it is important to offer them the safest route and to have information on how to make the cycling area safe. Many of the main routes and cycle facilities are decided on without sufficient analytical rationale, which unfortunately sometimes leads to a lack of efficiency in public spending and uncertain usage.

The lack of data on bicycle infrastructure and parking is a common observation. In France, start-up service and data management companies have developed, in particular Ecocompteur, the world leader in bicycle and pedestrian counting, and Géovélo, which offers a cycle route application, which are structured on the basis of the great lack of information and statistics on cycling in France. They also represent France vélo's expertise internationally, with international development.

Géovélo, a bike-specific GPS useful in more ways than one
Géovélo is a general public application, which helps cyclists find the safest route in town (maximising the use of cycle facilities, lanes with the least car traffic, etc.) and discovery/tourist routes. It has a large community in France of 600,000 users/contributors and 40 territories use its services in France including Paris, Nantes metropole, Tours,

Montauban, the Aix-Marseille Provence metropolitan area, Greater Lyon, Bordeaux metropolitan area, but also Greater Geneva and Barcelona.
Géovélo has developed real expertise in mapping cycle routes. The GPS tracks generated by the application, on a sound cartographic basis, are then analysed and made available to the territories. The analyses provided (average speeds, stopping times, heat maps of cyclist flows with a granularity that can go down to the street, maps of origins/destinations, maps of the state of the roads generated thanks to the vibrations picked up by the phone) make it possible to rationalise decisions on cycling development policy and to measure their effects.

B. The bicycle as a work tool: cyclologistics and cyclomobility of professionals

The professional use of bicycles covers very different economic realities depending on the activity, a diversity that is supported by the association Les Boîtes à Vélo France: craftsmen by bicycle, mail and parcel delivery, couriers by bicycle, urban logistics. Cycling and cyclomobility for professionals are important levers, particularly in low emission zones (LEZ), for meeting greenhouse gas emission reduction targets. According to a European study, 37% of motorised journeys in the city (deliveries and other professionals) can be made by bicycle, but beyond 10 km the cargo bike is less efficient.

A 2015 European study on "cycle and logistics" indicated that 50% of goods can be transported by cycle (perhaps 25% for professional goods). The Impact of Cycling report provides some interesting figures on cycling for various business purposes, based on data from the 2008 National Transport and Travel Survey (ENTD). The modal share of cycling for business trips or visits is 1.2% (4.5 million trips per year, average distance 5.3km), 1.3% for meetings and visits to sites, customers or suppliers (17.5 million trips per year, average distance 2.4km), and 5.6% for training courses (6.2 million trips per year, average distance 4.5km). However, the development of bicycle use by companies depends on a favourable legal and material environment and also on the presence of sufficient operational services.

Those involved in bicycle entrepreneurship in France are represented by the Association Les Boîtes à Vélo France. Its objective is to promote the use of the bicycle as the main mode of professional travel. It has around 300 companies representing over 800 FTEs, including 18 bicycle manufacturers.

Cycling is booming

The transport of parcels in Europe is constantly increasing, driven by the development of e-commerce and sales between individuals. This is leading to a strong presence in the urban space of delivery vans that load up in hubs that are still located on the outskirts of cities and manage urban rounds with many stops, on the street, the pavement or the bicycle path. Cycling greatly reduces the nuisance caused by fleets of light commercial vehicles (LCVs) while meeting the challenges of the EPZ.

The transition to urban cyclologistics

There were 109 cyclologistics companies in January 2021, a quarter of which were created since 2020, throughout France, including in medium-sized towns, according to the Boites à vélo survey. The reflection on the reorganisation of last-mile logistics is leading the major players in the sector to invest in the field of cyclologistics. The French Post Office has been developing a cycling strategy for a long time and is placing orders for new cargo bikes. Amazon is also carrying out major projects with a view to meeting the 2024 deadline by enabling 100% carbon-free delivery, partly by bicycle. A major German player, DB Schenker, is also developing cargo bike solutions in France.

La Poste, a player in the field of cycling
La Poste is the main company delivering mail and parcels by bicycle in France. Since 2009, La Poste has chosen electric bicycles and has more than 20,000 electric bicycles (it stopped using conventional bicycles in 2014). It is experimenting with cargo bikes, with a current fleet of several hundred. With a wealth of experience from its past operations, it is very demanding on the characteristics of the models used, which, given the volumes, can be developed specifically to meet its specifications. The operator considers that the bicycle is 30% more efficient than the van in urban areas, but that in less dense areas (suburban, rural), speed is once again a requirement, which means that it has to switch back to a motorised vehicle (which can be a motorised three-wheeled vehicle, like its 7000 Stabi with a 30-litre capacity).
The Post Office has alerted us to the risks that would be posed by the introduction of a "small transport capacity" licence to give administrative authorisation for cyclologistics.

National Cycling Strategy

The government has published a National Plan for the Development of Cycling5 in spring 2021. Similarly, the Nationaler Radverkehrsplan 3.0 of our German neighbours places among its top ten priorities the provision of last-mile logistics by decarbonised means, i.e. mainly electrically assisted cargo bikes.

Through the National Plan for the Development of Cycling Logistics, the State is devoting 12 million euros to this (these are energy saving certificates (CEE)). This strategy is based on four axes:

- Encourage the start-up of bicycle delivery activities (support delivery by cargo bike, support the creation of bicycle companies and equipment for professionals, encourage the replacement of old thermal vehicles with electric bicycles);
- Mobilise stakeholders (set an example in the public sphere, develop suitable insurance products, facilitate the commitment of the main principals to direct an increasing proportion of their flows towards cycling solutions);
- Facilitate cycle logistics in cities by providing premises for cycle logistics hubs;
- Develop urban innovation and open data (support the development of cycle logistics through innovative digital solutions, support initiatives to generate detailed knowledge in real time of cycle infrastructures dedicated to cycle logistics, promote cycle logistics to the general public).

One example is the CEE Colisactiv'6 programme, which aims to encourage the transition to cargo bikes and the abandonment of the internal combustion engine for the delivery of the last few kilometres of parcels, by absorbing the additional cost of using an active delivery mode. It is available to all local authorities with more than 150,000 inhabitants.7

An ambition to be applied on the ground

The main difficulties in the field of cycle logistics are to find space in the city for bicycles, and in particular to find the land needed to create hubs for the last kilometre. There is an issue concerning the standards of cargo bikes and their motorisation, which I touched on in the industrial section.

In order to develop cyclologistics, the operation of urban logistics must be reviewed to allow cargo bikes to circulate, to be able to park for deliveries, without getting in the way, and to provide wide cycle paths adapted to cargo bikes. Urban logistics spaces are also needed, through the creation of permanent or temporary micro-hubs in the hyper-city centres for last mile logistics (intermodal hubs allowing cross-docking, i.e. the switch from lorries to cargo bikes), with a pooling of deliveries and a storage area for bikes and cargo bikes. This is a subject on which local authorities must be trained and know how to support companies.

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[5] www.ecologie.gouv.fr/plan-national-developpement-cyclologistique
[6] La loi n°2010-788 du 12 juillet 2010 portant engagement national pour l'environnement rend possible la délivrance de certificats d'économies d'énergie dans le cadre du cofinancement de programmes liés à la maîtrise de la consommation énergétique. Désormais, l'article L.221-7 du Code de l'énergie prévoit que la contribution à des programmes (…) portant sur la mobilité économe en énergies fossiles peut donner lieu à la délivrance de CEE.
[7] Référence : www.fub.fr/presse/cyclologistique-programme-colisactiv-s-ouvre-nouveaux-territoires (20211109)

Amazon and cycling
For Amazon, soft mobility has started in Strasbourg, due to the ban on thermal vehicles in the hyper centre. Rounds are prepared by Amazon Logistics (optimisation and sorting), and the transport itself, which is carried out solely by three-wheeled bicycles, is subcontracted. The company has chosen to serve all of Paris with zero emissions: pedestrians, bicycles and electric vehicles. Bicycle deliveries have been deployed since May 2020. Amazon currently relies on around fifteen partners in Paris, which will represent between 150 and 170 bikes by the end of 2021.
This also involves the creation of infrastructure. Amazon began by building an urban hub in Filles du Calvaire. The company responded to a call for tenders from the RATP to use the bus centres during the day. It has set up urban logistics spaces at three RATP sites, without storage and allowing for very rapid transhipment, delivered by two 19t trucks per day, which makes it possible to supply 20 to 30 delivery rounds with cargo bikes. By the end of 2021, after one year of implementation, two out of three parcels in Paris intramuros will be delivered using zero emissions, almost three out of four parcels. The same logic is to be implemented at the La Défense site

31. INTEGRATE THE USE OF CARGO BIKES AND THE DEVELOPMENT OF CYCLE LOGISTICS IN THE PLANNING OF CITIES (PL, PCAET, ZFE): WIDE CYCLE PATHS, ADAPTED PARKING, URBAN LOGISTICS SPACES

32. IMPLEMENT CYCLING PLANS AS A MATTER OF PRIORITY IN URBAN AREAS

The potential of business cycling

There are many reasons to switch to cycling as a mode of business transport: good for the economy (less costly investment), good for health (daily physical activity), good for the environment (less GHGs and air pollution), more profitable (less time wasted parking), good for the image, etc. Today, there are an estimated 600 bicycle companies, with a very significant growth potential. Many professions are concerned: plumbers, electricians, mobile repairers, landscapers, food delivery and food bikes, etc., but also home care and health care professions. But to date, the bicycle does not enjoy the advantages of other vehicles when used for professional purposes. I want to give the professional bicycle its rightful place in France.

Clarification of aid schemes

Entrepreneurs who wish to choose a professional bicycle are faced with a multitude of schemes, which are rarely permanent and are currently less favourable than if they choose a motorised vehicle. Several schemes only last six months or one year (ADEME's Tremplin aid (2021) for the acquisition of cargo bikes by SMEs: 35 applications for approximately 1 million euros of aid and 230 cargo bikes), while others have rules that change every three months (e.g. Ecological Bonus or Conversion Bonus), without favouring the VSEs that need it most.

The aid for the acquisition of new vehicles (ecological bonus) concerns new electric cars and commercial vehicles (6,000 euros) and two or three-wheeled electric vehicles and quadricycles with a power output of more than 3 Kw (1,000 euros reduced to 900 euros in 2018). Only cargo bikes and electric trailers were included late in July 2021 until the end of 2022 (up to 1000 euros within the 40% limit). Purchase subsidies for simple electrically assisted bicycles or non-electric trailers are not open to legal entities, except in the case of a conversion premium. 15,000 per bicycle, bearing in mind that a van is equivalent in terms of loading capacity to two or three bicycles) and the cost of maintenance is often high because of the heterogeneous quality of the urban road network. The conversion premium is reserved for bicycles, whether or not they are electrically assisted, in exchange for scrapping a commercial vehicle.

The conversion bonuses and premiums are not yet clear and effective for professionals, whereas they should be a lever for switching to low-carbon mobility. I propose to think about a scheme dedicated to

I propose to think about a scheme dedicated to professionals, with a significant amount to trigger the changeover and ideally providing for all cases: purchase, rental, leasing, etc.

VAT deductibility

A professional who acquires a commercial vehicle for professional purposes can deduct VAT. I want to put companies that choose sustainable mobility on an equal footing with companies that use motorised vehicles for their business activities. The VAT on bicycles (of any type) rented out is already deductible. Beyond the cargo bike, all bikes used for business purposes should be taken into account.

According to Boites à Vélo France, it would be desirable, as part of the ecological transition, to authorise total or partial deductibility of VAT for any cycle or cargo bike acquired by a company, regardless of its status. The deductibility of VAT on the purchase of a bicycle could lead to an incentive for the transition to professional cyclomobility and would also allow companies using bicycles (craftsmen, plumbers, health professionals) to have their work tool recognised as such. I agree with this proposal. The cost of the measure is estimated at 400,000 euros/year (between 150,000 euros and 1,000,000 euros/year). This amount will change if the rapid development of professional and recreational cycling continues.

Craftsmen and cycling, the involvement of the Chambers of Trades and Crafts
The Chambers of Trades and Crafts support craftsmen in their day-to-day mobility, particularly in the ecological transition diagnosis currently being carried out as part of the France Relance plan with 17,500 craftsmen by the end of 2022. CMA France is observing a growing demand from craftsmen on the subject of bicycle logistics. This is why CMA France signed a partnership with the CEE V-Logistique programme run by the Union Sport et Cycles.
This programme makes bicycles and electrically-assisted cargo bikes available to companies free of charge for one year electrically assisted cargo bikes to companies for one year (provided that a partial (on condition of a partial substitution of a thermal vehicle).
Unfortunately, the programme has been badly affected by the impact of the crisis on French manufacturers.
The programme has unfortunately been badly affected by the consequences of the crisis on French cycle manufacturers. This international problem has led to delays in delivery, and led to a 50% reduction in the total number of bicycles made bikes made available. Nevertheless, the programme registered 137 requests from craftsmen (about 110 eligible) out of a total of 718 requests (i.e. 15% of the bikes available).
The CMA network also works regularly with the association Les Boîtes à Vélo. Indeed, 30% of their members are craftsmen. They are also trainers for other craftsmen

33. SET UP A CLEAR AND SUSTAINABLE PURCHASE AID SYSTEM FOR THE DEVELOPMENT OF BICYCLES FOR PROFESSIONAL USE
34. MAKE VAT DEDUCTIBLE FOR THE PURCHASE OF BICYCLES FOR PROFESSIONALS
35. STABILISE AND IMPROVE THE REGULATORY AND LEGAL ENVIRONMENT FOR THE USE OF BICYCLES IN THE PROFESSIONAL CONTEXT

C. The economics of cycle tourism

State of play

France is the second country after Germany in terms of bicycle tourism, with an increasing number of important and well-equipped routes. France is currently covered by ten European routes, representing 8,000 km of which 90% are complete. The national cycle route plan comprises 13,000 km, of which approximately 75% has been completed.

Cycling as a holiday activity for the French

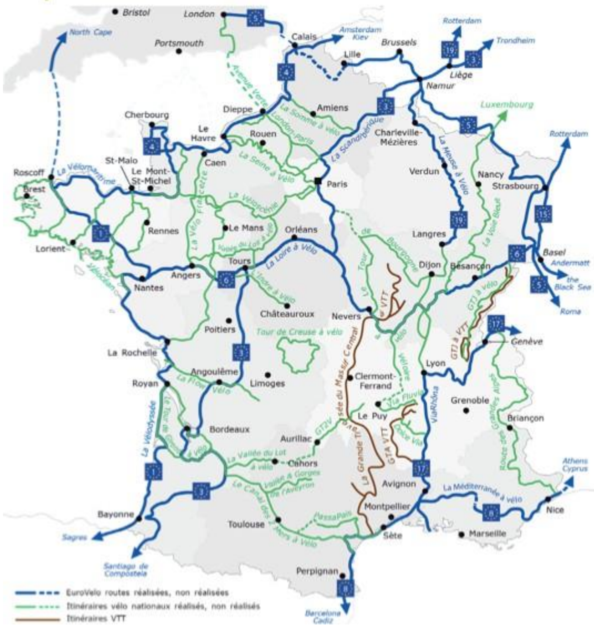
Cycling as a leisure activity is by far the most common form of cycling in France, with 57% of French people over the age of 15 claiming to cycle, but only 5% regularly. Cycling is used for short trips, from a few hours to a day, particularly on greenways, but also on more challenging and sporting routes, such as the Pyrenean and Alpine passes. It is a convivial practice, of limited duration, on a round trip, on average 28 km, mainly on greenways near large towns.

At the same time, every year around 15 million French people cycle regularly or occasionally during their holidays[8] . For 27% of them, cycling is the main mode of transport to their holiday destination. Cycling is also a developing mode of travel for urban tourism. The French often come to cycling as a means of transport after having experienced it through leisure and tourism. This is a feature shared with southern European countries.

Cycling tourism in strong development

Tourism accounts for half of the traffic on the greenways and cycle routes. It is often local tourism, since 50% of tourists live less than 200 km from the route. It is estimated that 20% of cycle tourism on the main routes is carried out by foreigners: cycle tourism attracts a significant proportion of foreigners, mainly Europeans, particularly Germans, Belgians and Dutch, British and Swiss. The non-European clientele (Americans, Australians, Japanese) are very expensive tourists (4,000 euros per week compared to 1,000 euros for French cyclotourists).Cycling tourism has a strong potential for development, since in 2020 there will be +11% more passages than in 2019, i.e. +28% excluding the confinement period[9]. The Tour de France has a very positive impact on the development of cycle tourism, with foreign and French tourists enjoying the emblematic stages of the Tour. A cycling tourist consumes 20% more than a normal tourist, with an average of 68 euros per day.

Itinéraires cyclables présents début 2021 sur la plateforme France Vélo Tourisme



8 DGE, Abdel Khiati 2018

9 Some key figures on cycle tourism in 2020: https://www.velo-territoires.org/resource/chiffres-cles-2020-tourisme- a-velo/ It should be noted that, as with all data relating to cycling, we do not have precise figures on cycle tourism, despite the counts carried out by Vélo et Territoires (but which do not make it possible to determine the origin of cycle tourists, for example)

It is the most important sector in the cycling economy in terms of employment and economic spin-offs, accounting in 2019 for almost 33,800 jobs (out of 78,000 in the cycling economy) and 4.2 billion euros according to the Impact du vélo study.

The players in this sector are grouped together in France vélo tourisme10 , a public interest association created about ten years ago, with equal public and private funding, which aims to develop bicycle tourism in France. In September 2021, 7,000 establishments were awarded the "Accueil vélo" label. Of course, the development of cycle tourism also has beneficial effects on the carbon footprint and public health.

Fréquentation et retombées économiques de « La Loire à Vélo »

- **Plus d'1 Million de cyclistes accueillis chaque année**
- **Plus de 34 Millions d'euros de retombées économiques par an**
- **Une très haute présence des clientèles touristiques, sans équivalent en France (43% cyclotouristes)**
- **La dépense moyenne des touristes à vélo progresse et dépasse 80 € par jour**
- **Une véritable destination touristique: pour 9 touristes sur 10 « La Loire à Vélo »**
- **Un parcours initiatique pour 41% des touristes et 28% des itinérants**
- **Développement spectaculaire de l'itinérance sur plusieurs jours (+ 25% des cyclistes)**
- **Allongement durée moyenne de séjour (8 jours) et développement ailes de saison**
- **« Accueil Vélo » une marque déterminante dans le choix du prestataire pour 44% des touristes.**
- **Forte progression de l'usage du train: 39% des touristes à vélo (contre 45% en voiture).**
- **Un phénomène nouveau, le développement de la pratique du VAE (Vélo Assistance Electrique) touristique.**
- **La location de vélo prend du poids (13% parmi les touristes).**
- **Un niveau de qualité en hausse avec une note de satisfaction globale de 7,9/10.**
- **Une véloroute internationale (+ 30% étrangers)**

Source : Données de la Région Centre Val-de-Loire, janvier 2022

Opportunities and obstacles

Many French coastal areas have developed cycling as a holiday mode of transport, particularly on the Atlantic coast, to get to the sites that generate the most travel, especially the beaches. It is the main solution for low-carbon mobility when the population is multiplied by 100, and often the most reasonable and efficient solution.

In mountain areas, as the snow recedes, cycling is developing in all seasons as a sporting alternative, made possible for the whole family by the electrically assisted bicycle. While cycling is traditionally an activity reserved for good weather, new trends are emerging, such as the fat bike on the snowy slopes. If mountain biking is the favourite bike of the French (71%), its practice is perfectly suited to the mountainous terrain: the slopes become a place to practice, from the simplest to the most arduous routes, from family rides to technical descents. Based on the model of winter snow parks, some resorts have set up bike parks for the more daring, while enthusiasts of strong sensations and freedom roam the French massifs in search of the best mountain bike descents. Finally, the road bike is the king of the massifs, regularly honoured by the Tour de France and its ascent of the most mythical passes, attracting thousands of fans.

[10] https://www.francevelotourisme.com/,

These activities often require the presence of The presence of supervisors justifies the development of mountain bike schools, for safer and more environmentally friendly cycling.

However, the supply available today is not sufficient, either in terms of routes, parking or services.

The global reflection on cycle facilities and infrastructures must integrate the specific challenges of cycle tourism. The first is to complete the national cycle network. Of the national structure scheme, 6,700 km remain to be completed: this is the backbone on which the regional, departmental and inter-municipal schemes are based. The second is the possibility of putting a bicycle on a train or bus.

There is also a quality issue, as some routes are ageing or unsafe. It is still difficult to access certain sites and routes, particularly by public transport. There is the question of bicycle/train/bus intermodality, including for less densely populated areas: France is lagging behind in this area, unlike other European countries. Information on carrying on trains in France has recently improved, but remains one of the main weaknesses for the development of cycle tourism in France. Parking on routes is still often inadequate, whether in accommodation and restaurants or at tourist sites, particularly in towns. What to do with your bike and your full panniers? The example of Mont Saint-Michel is enlightening: bicycles have only been allowed to park at the foot of the site since 2021.

In this context, making France the world's "leading cycle tourism destination" by 2030 is one of the objectives of the Destination France Plan announced by the Prime Minister on 20 November 2021. To achieve this, the plan to win back tourism will support investment in sustainable tourism infrastructure to the tune of €44 million (total budget of the plan: €1.9 billion), including the improvement or creation of cycle routes, service areas along cycle routes and parking facilities near tourist sites or tourist offices. "ADEME will support the commitment of tourism stakeholders, particularly local authorities, in the form of calls for projects aimed at promoting or studying the creation and improvement of cycle routes or setting up dedicated service areas along a route. Support will also be provided to tourist sites or tourist offices wishing to invest in obtaining the "Accueil Vélo" label, particularly by creating parking spaces.

36. PROMOTE INFORMATION ON BICYCLE TOURISM AND THE TAKING OF BICYCLES ON TRAINS

37. ENCOURAGE ACTIVE MOBILITY IN TOURIST DESTINATIONS

38. MEET THE OBJECTIVES OF THE SUSTAINABLE TOURISM RECOVERY PLAN BY COMMUNICATING THE ADVANTAGES OF CYCLE TOURISM

39. BUILD A SUSTAINABLE OBSERVATION OF CYCLE TOURISM: ECONOMIC WEIGHT; JOBS (FINANCE CYCLE TOURISM OBSERVATORY PROJECTS AND DEDICATED STUDIES)

4. REMOVING THE THREE BARRIERS TO CYCLING

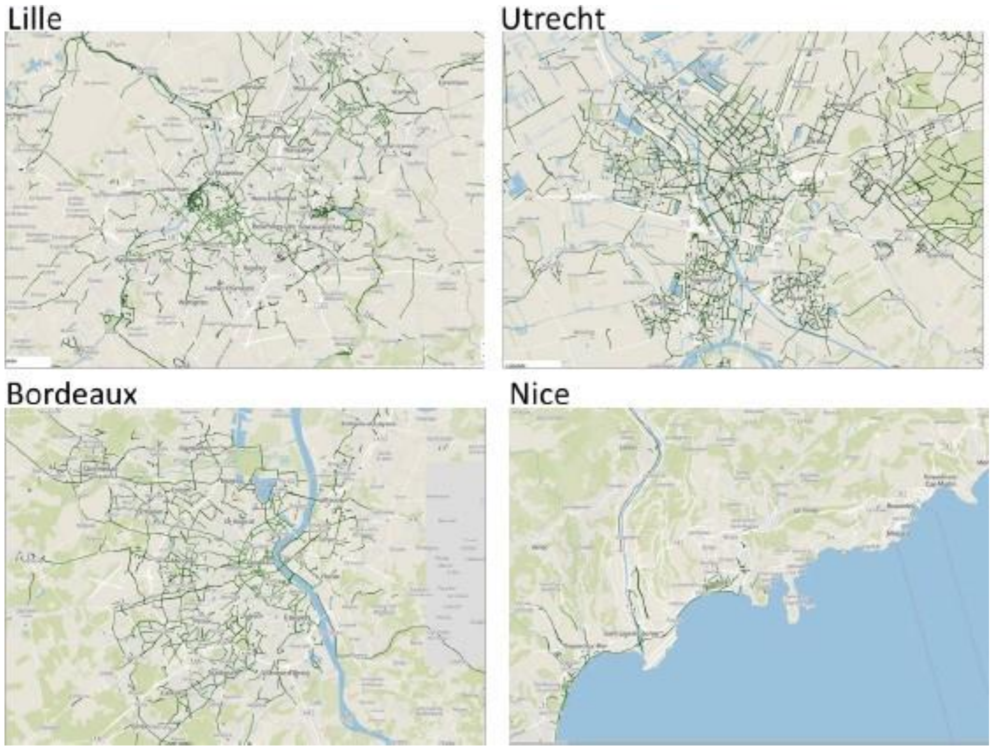
Throughout my travels, my meetings and my hearings, all the players in the cycling industry have presented me with the significant economic development prospects that cycling represents. However, almost all of them pointed out a necessary condition for this economic development to take place, that of the real development of cycling in our country, and for this to happen, public policies must be put in place to encourage cycling on a daily basis and therefore to remove the main obstacles. These obstacles are known to everyone. They are safety for travelling, safety for the bicycle and the need to know how to ride. If we do not succeed in removing these three obstacles, the modal share of cycling in French travel will increase only slightly and the economic, social and environmental benefits will only develop marginally.

A. Developing infrastructure

Knowing the current cycling network

In order to develop cycling, the first requirement is to offer cyclists a welcoming and inclusive public space by building more and more efficient cycling infrastructures, which necessarily take up space from the car, while at the same time transforming the road network to make it more attractive to cyclists, by moderating speeds, limiting motorised transit and creating comfortable pedestrian spaces to limit potential conflicts.

To date, France is lagging behind in terms of cycling infrastructure.



Source : Comparison of the cycling networks of three French cities and one Dutch city, p. 295 "Impact du vélo" report

This delay is difficult to quantify, for one simple reason. To date, we do not have an exhaustive map of cycling facilities. The first challenge on the question of infrastructure, as in general for cycling, is to have reliable and shared data on existing infrastructure, using the same reference system. This referencing work, which has already been done in some regions, would make it possible to monitor local developments, to construct local cycle plans more effectively and to measure the effort by

creating comparisons. Territories know too little about the real state of their cycling facilities. It would also allow thousands of applications and platforms to be run around the world and in France. Without accurate mapping data, the calculators of single-mode or multi-mode cycling platforms will not return good route calculations and will not help users on a daily basis. This applies to all cycle facilities, paths and parking.

Active counters in France in 2021, source Ecocompteur

40. PROMOTE THE STANDARD OF CYCLING FACILITIES DATA TO BE USED BY ALL TERRITORIES, FOR URBAN AND TOURIST PURPOSES, AND ENCOURAGE TERRITORIES TO MAP THEMSELVES

41. HAVE MORE DETAILED STATISTICS ON CYCLING (COUNTS, OBSERVATORIES, MODAL SHARE SURVEY)

To monitor the development of cycling, it is essential to have counts. To date, there are 1,500 active and geolocated bicycle counters in 2021, supported by the French company Ecocompteur, the world leader in pedestrian and bicycle counting. The counters are mainly located on the Eurovéloroutes to date. Counting needs to be developed, particularly on infrastructure that is not yet known.

Strong growth in cycling facilities

I draw on the Infrastructure Policy Board's November 2021 note on cycling infrastructure as part of the implementation of the cycle plan. According to existing data (with the limitations noted above), cycling facilities have increased between 2017 and 2020 by 26%. For cycle parking, the data available is from Géovélo, which references 68,992 spaces.

Infrastructure	unity	2017	2018	2019	2020	2021
Total cycling facilities	km	54 433	57 823	62 901	68 956	73406
of which cycle paths and greenways	km	40 201	43 095	46 804	51 154	53 552

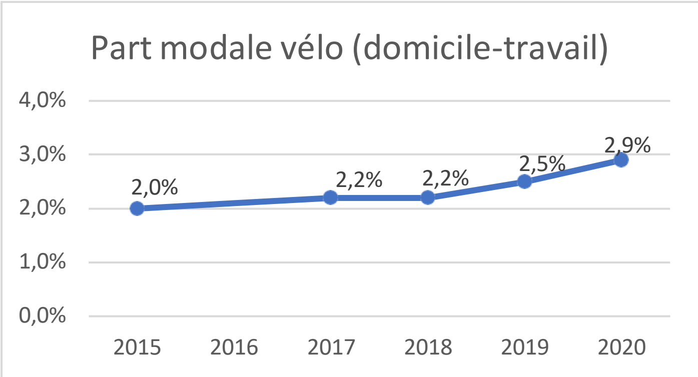
Source : Géovélo on the basis of Openstreetmap

The modal share of cycling today and tomorrow

According to the Eurobarometer (2014), France ranked twentieth in the Europe of 27 for the place of cycling. By way of comparison, the modal shares in neighbouring countries are 29% in the Netherlands, 12% in Germany and 8% in

Belgium. It should be noted that other countries do not take this modal share data into account when describing cycling. The German cycling plan prefers to focus on increasing the number of kilometres travelled per inhabitant.

The national modal share of cycling is only measured every ten years by the Commissariat Général au Développement Durable (CGDD) as part of the personal mobility surveys (EMP). In 2019, for the first time in 40 years, the share of cycling has stabilised, and the share of walking has increased. In addition, since 2015, INSEE has been measuring the share of cycling as the main mode of travel to work in the census, a share that has been steadily increasing. It should be pointed out that the expected increase from 2.7% to 9% between 2019 and 2024 implies annual growth of around 27%, a figure that was achieved in 2020 (excluding the containment period), but which seems difficult to achieve in the long term without massive investment to remove the obstacles to cycling.



Note: the year 2020 is measured before containment, source INSEE - population census

Funding for active mobility over the period 2018-2022

Cycling infrastructure is almost exclusively provided by local authorities, road managers or mobility organising authorities. As measured by the Vélo & Territoires and Club des villes et territoires cyclables surveys in 2021, the average investment budget for all local authorities combined is €8/year/inhabitant (€500 million/year), with slow growth and significant differences between large urban areas (€20/year/inhabitant) and small ones (€3/year/inhabitant). The number of safe cycle paths is only 0.8 million per inhabitant in 2020. It should be noted that the investment budget of municipalities is not well known.

Without double counting11

Collectivités territoriales	Nbre de collectivités	Dépenses vélo en 2019 (€ /hab)		Dépenses vélo en 2019 (M€)	
		Fonctionnement	Investissement	Fonctionnement	Investissement
EPCI	1 241	1,2	4,1	75,6	265,5
Départements	96	0,4	3	25,5	192,9
Régions	13	0,03	0,5	1,7	32,1
Total		1,63	7,6	102,8	490,5
*Communes***	*34 841*	*0,3*	*5,5*	*18,8*	*355,2*

***Les données existantes à l'échelle des communes sont difficilement exploitables compte tenu du faible nombre de communes ayant répondu aux enquêtes, source DGITM*

[11] Source : Cycling expenditure by French local authorities and its impact (DGITM 2021).

Existing State aid for local authority cycling projects is of several kinds, depends on different procedures and can be combined with regional subsidies. Generally speaking, their diversity and the system of calls for projects hinder clarity and reduce their leverage effect.

The Active Mobility Fund

Housed within the Agence de financement des infrastructures de transport de France, the active mobility fund was created in 2019 and endowed with €350 million over seven years (2019-2025). It has been the subject of four calls for projects since its launch. Three calls have been awarded and the fourth is underway. The purpose of the fund is to provide financial support to project owners for cycle facilities in order to develop safe routes and eliminate black spots... Facilities for walking (pavements, pedestrian-bike bridges, etc.) are included in the eligible base.

In 2021, the fund has been allocated an additional 150 million euros as part of the France relaunch: 100 million euros for cycling facilities (managed by the regional prefects), 50 million euros for secure bicycle parking in stations. 533 projects in 323 territories have been selected from 887 projects submitted during the first three calls for projects. 50 million per year initially envisaged. By the end of 2022, at its current size, the active mobility fund will be almost exhausted.

(M€ including relaunch)	2019	2020	2021	2022 forecast
Subsidies awarded	43	71	151	*150*
Commitment authorisations	29	45	*170*	*160*
Payment credits	1	5	*20*	*81*

Consumption of the Active Mobility Fund, Source DGITM

However, these figures call for a comment on the very low rate of implementation to date: while the consumption of commitment authorisations (CAs) is satisfactory (financing agreements are effectively signed with local authorities) for the past few years, payment appropriations attest to a very low implementation of infrastructure. It is to be hoped that this rate of implementation is due to Covid and the local elections in 2020 which slow down investments.

Calls for projects	Total CFP 2019	Total CFP 2020	Total 3e CFP
Date of announcement of the winners	sept-19	sept-20	févr-21
Territories			
number of applicants	170	183	229
Number of winning territories	112	126	154
of which Overseas Territories	5	8	10
Projects			
number of candidate projects	275	301	311
Number of winning projects	153	186	194
of which Overseas Territories	8	12	10
of which sparsely populated areas	56	86	120
Amount (M€)			
Amount of subsidy requested	ND	115	164
Amount of subsidies awarded	43	71	101
of which amount allocated overseas	2	9	6
of which amount allocated sparsely populated areas	14	33	56

source DGITM

The projects are subsidised up to 20% in dense areas (urban units >100,000 inhabitants), 40% in non-dense areas and 60% in the French overseas territories. It appears that for some of the local authorities we met, the call for projects and the low subsidy rate in urban areas do not represent a sufficient leverage effect. At a time when it is urgent to equip low-emission areas with bicycle facilities to provide an alternative to the car, the 20% rate in dense areas raises questions. It seems to me that it is necessary to subsidise dense areas more frankly so that they devote more space to cycling - up to 50% - and in particular the territories concerned by the LEZs, with the creation of an additional 20% bonus.

DSIL - Local Investment Support Grant

With regard to cycling and pedestrian facilities, the DSIL is part of the government's cycling and active mobility plan and complements the active mobility fund by financing generally smaller-scale facilities. Over the period 2018-2020, 919 projects were supported for a total subsidy amount of €149 million. In 2020, 80% of the grants were under €200,000, compared with 72% over €200,000 for the grants awarded during the 3rd call for projects of the Active Mobility Fund.

Other funding

Cycling has an increasingly significant place in the Energy Savings Certificate programmes, with €235M committed since 2017. These programmes mainly cover the development of cycling policies, parking, training, and support for employers.

By way of illustration:

- AVELO 1 and 2 (ADEME) for 40 million euros: to support 600 winning local authorities in the strategic planning of facilities (cycling master plan), the testing of innovative cycling services and the development of local engineering (cycling officers, communication campaigns);
- 45 million on secure parking (including public roads): this very simple fund has been very successful;
- 95 million (2020-2021): repair aid of 50 euros for 1.7 million bicycles repaired.

Depending on the provisions made at regional level, the European Regional Development Fund (ERDF) or the European Agricultural Fund for Rural Development (EAFRD) can support cycling projects.

This description of existing aid shows the need to clarify it, to make it more efficient and to prioritise it. Funding for parking should also be made permanent as part of the Bicycle Plan. The State must work with local authorities and stakeholders to simplify and clarify aid schemes and make them sustainable (move away from a single call for tenders and open up the possibility of multi-year funding).

Infrastructure needs

According to the Impact du vélo study, for a modal share target of 9% in 2030, presented as a "catch-up" scenario in the study, the investment programme in cycling infrastructure required is estimated at 1.5 m/inhabitant, i.e. 100,000 km of cycle paths in dedicated sites and greenways, i.e. an increase of 50,000 km and the elimination of major gaps.

For bicycle parking, between 3 and 20 million additional secure spaces are expected. 12.6 million French people live in vertical housing and do not have access to a secure bicycle room. Of these, 400,000 are currently regular bicycle users. There is a considerable need for secure parking in stations, schools, colleges, universities, businesses and in vertical housing, etc. The total amount of investment required, given the current level of equipment, would be between 3 and 20 million spaces for a total of

3 to 18 billion euros. Two-thirds of these sums are private investments by real estate operators and landlords, one-third, i.e. 1 to 5.5 billion euros, are public investments.

This is a huge market in which we are fortunate to have leading companies, such as Abriplus and Altinnova, which offer a wide range of parking modules manufactured in France.

Scenarios for the development of cycling infrastructure

1.6 billion per year (equivalent to 3.6% of the national transport budget), with a slight difference between large conurbations ('30/year/inhabitant) and small ones ('20/year/inhabitant).

On the basis of this scenario and for a State share of 25% of these investments, the target would be 400 million euros per year from the State on average over the decade.

The Citizens' Climate Convention, in its proposal SD-A2.3, proposed to top up the active mobility fund by 200 million euros per year. Associations promoting cycling, whether they are federations of local authorities (Club des villes et territoires cyclables, Vélos et Territoires) or civil society (Fédération des usagers de la bicyclette), are keen to increase the amount of State investment to 500 million per year.

Impact of the Covid-19 pandemic on cycling investments
The Covid-19 pandemic has had a significant effect on cycling development in Europe, often reinforcing pre-existing dynamics. The European Cyclists' Federation recently published a study providing an initial assessment of the situation on a continental scale12 . Although imperfect, this initial snapshot attempts to quantify the new budgetary efforts made and describes the trend observed as a strengthening of policies in favour of cycling. It shows that 34 of the 94 largest cities in the EU have announced that they have taken measures in this direction. 1 billion has been spent on cycling infrastructure in Europe since the Covid-19 was launched, with over 1,000 kilometres implemented to date.
The countries that have increased their budgets for cycling development the most are:

Countries	*Additional budget allocated (€/capita)*
Belgium	*39,76*
Slovakia	*18,32*
Finland	*7,76*
Romania	*6,24*
Italy	*5,04*
France	*4,91*
United-Kingdom	*4,8*
Lithuania	*2,61*

The Conseil d'orientation des infrastructures (COI) proposes four scenarios for the development of cycling infrastructure.

- Scenario 1 - simple replenishment of the active mobility fund at the current level of state support: 50 million per year from 2023 (250 million over 5 years)

This scenario corresponds to the extension of the original Bicycle Plan, taking into account its consumption over the period 2029-2022. Indeed, as it was conceived in 2018, the Plan provided for an investment of €50 million. This sum would be renewed from 2023 onwards, for a total of 250 million euros over 5 years. This scenario is clearly not up to the challenge, as the modal share would remain at around 4%.

[12] https://datastudio.google.com/embed/reporting/1ae589b4-e01c-4c27-8336-f683ea516256/page/EYVTB

- Scenario 2 - doubling of the initial cycling plan: 100 million per year from 2023 (500 million over 5 years)

After four calls for projects, the scheme is gaining momentum. The latter is now well identified by local authorities, and the executives are now in place, a factor that encourages a greater number of quality projects. This scenario takes this development into account and assumes an investment requirement of 100 million euros from 2023 (500 million euros over 5 years).

- Scenario 3 - adjustment to needs already identified: 200 million per year from 2023 (1 billion euros over 5 years)

The Citizens' Climate Convention proposes to increase the active mobility fund to 200 million euros per year. This sum corresponds to the amount of subsidies planned for 2022 by combining the calls for projects of the active mobility fund and the recovery plan. The total need would be 1 billion euros over 5 years from 2023.

- Scenario 4 - in line with the ambition to develop cycling: 200 to 400 million per year over 2023-2027 (1.5 billion over 5 years)

This last scenario is progressive and is in line with the national objectives set out in the Bicycle Plan and the national low carbon strategy. The scenario considers the trend observed for local authorities to increase their power to carry out more numerous and more ambitious projects. It allows for a gradual increase in the State's share to 25% of the effort required by local authorities to significantly increase the modal share of cycling. The total requirement would be 1.5 billion euros over five years from 2023, with an increase of 200 to 400 million euros in each 50-million-euro increment. Beyond that, the need would increase further to reach an average of 400 million euros over the decade.

I propose that, in order to be consistent with our ambition, the active mobility fund should be updated without waiting for 2023, from September 2022. The development of the cycling sector is very dependent on the scenario that is chosen and applied.

42. STRENGTHEN AID TO LOCAL AUTHORITIES FOR INFRASTRUCTURE AS PART OF A TRANSPORT POLICY: TARGET OF €30/INHAB/YR

43. MAKE AID TO LOCAL AUTHORITIES MORE EFFECTIVE: SIMPLIFY AND CLARIFY AID SCHEMES AND MAKE THEM PERMANENT (MOVE AWAY FROM THE SINGLE CALL FOR PROJECTS APPROACH AND OPEN UP THE POSSIBILITY OF MULTI-YEAR FUNDING)

44. PROPOSE A HIGHER RATE OF SUBSIDY IN DENSE AREAS AND TOP UP THE STATE SUBSIDY IN AND AROUND CFAS

45. ENCOURAGE PROJECTS THAT ARE PART OF AN INTER-MUNICIPAL APPROACH

B. Accelerating the deployment of anti-theft tools

318,000 bicycles were stolen in mainland France in 2019 (latest data available). Theft is one of the main obstacles to cycling. The economic impact of theft is estimated at €76 million (bicycle impact study), taking into account the average price and obsolescence. A cyclist who has had his or her bicycle stolen tends not to buy another one and consequently to give up cycling.

Secure parking

As mentioned above, 12.6 million French people, including 368,000 regular cyclists, do not have access to secure bicycle parking. We have changed the law to be more ambitious about parking in new buildings. The main problem is the existing housing stock, for which there is no obligation, as the application decrees have not been published. What support can be envisaged in the context of thermal renovation?

To address this problem, local authorities are introducing secure parking services, particularly at intermodal locations. Secure parking services are developing, as shown by the ADEME study. The specialised French companies already mentioned, such as Altinnova and Abriplus, are thinking about urban solutions that combine design and security. Transport players such as Keolis are also integrating secure parking solutions into their mobility offer.

Source : ADEME

Carrying the identification of cycles

One of the main thrusts of the "Bicycle and Active Mobility Plan" presented in September 2018 is to better combat theft. To this end, the marking of all new bicycles sold in France has been mandatory since 1 January 2021. This measure also concerns second-hand bicycles sold by traders since 1 July 2021.

The Fichier National Unique des Cycles Identifiés (FNUCI) is the database for recording information about bicycles and their owners, which issues and stores all the bicycle identifiers issued by approved identification operators in a centralised and independent manner. The identifiers are the key to storing data on bicycles and their owners and allow the owner of an identified bicycle to be contacted and returned, but also to trace all the events in the life cycle of the bicycle (sale, resale, theft, return, destruction, etc.). The FNUCI is managed exclusively by the Association de Promotion et d'Identification des Cycles (APIC), founded by the Union Sport & Cycle and the FUB, by delegation from the State. This is a remarkable example of public-private cooperation.

For the system to be effective, it is necessary to continue marking the existing fleet of bicycles and also to train police teams to use the file. Given France's European situation, even marked stolen bikes can easily be resold in a neighbouring country. This is why the French cycle industry proposes to extend the system to the European level.

The possibilities of digital technology

In the future, bicycles - like mobile phones and cars - will be able to benefit from advances in technology to provide new ways of combating theft. Integrated GPS, identification by chip, etc. Solutions must be pursued and innovations supported.

46. EXTENDING THE IDENTIFICATION OF CYCLES (APIC) TO THE EUROPEAN LEVEL

47. FINANCE INNOVATIONS TO COMBAT THEFT

C. Getting young people on to bikes

Everyday cycling also undoubtedly involves children learning to ride a bike so that they become tomorrow's cyclists. Unfortunately, we have seen a decline in cycling among our young people. Teaching our children to ride a bike is also a necessity to enable them to acquire this basic skill and to encourage them to use soft mobility from an early age, but also to fight against sedentary lifestyles and to preserve health, to learn to respect the rules and the sharing of space, in an eco-responsible approach. The experience of our northern neighbours also shows that this practice strongly develops children's autonomy. This is why one of the three components of the 2018 cycling plan is the "Know how to ride a bike" (SRAV).

The SRAV is built around a ten-hour training programme for children aged 6 to 11, divided into three blocks:

1. Knowing how to pedal: mastering the basics of cycling (mastering balance, pedalling, turning, braking);

2. Knowing how to ride: discovering bicycle mobility in a safe environment (riding in a group, informing, understanding road signs);

3. Knowing how to ride a bike: riding in a real situation.

The SRAV is run by the Ministry of Sport, in conjunction with the Ministry of Education, Youth and Sport, the Ministry of the Interior and the Ministry of Transport. It can be set up in the school, extracurricular or after-school context. It also relies on associations and sports federations that work for the development of cycling and safety.

Launched in 2018, its 2021 results are still rather timid, despite a voluntary acceleration since 2020. 78,000 certificates were issued between 2019 and 2021, compared with 9,000 in 2020.
You can't learn to ride without infrastructure, just as you can't learn to swim without a pool. Block 3 is the most problematic, as teachers are reluctant to take children on public roads. School tracks should also be built for blocks 1 and 2, where the playground cannot accommodate the activity. The SRAV could be continued at secondary school level, with discovery classes, incentives via the eco-delegates, and a real assessment in the form of a "bicycle certificate".
Many schools would like to have their own bikes. They are encountering supply difficulties in the current context. Some players have already signed agreements with Décathlon. But apart from financing, the major difficulty is also to finance the parking of the SRAV bike park, if possible with premises and maintenance and repair equipment. 10 million was earmarked for the SRAV in the recovery plan but has not appeared. To date, it is the local authorities that must invest alone.
It appears that if the objectives of the SRAV are to be met, it must be given clear and independent funding, the ambitious communication required for this national project must be provided, and its governance must be reviewed at interministerial level, in conjunction with the bicycle industry.

48. SUPPORTING LOCAL AUTHORITIES IN FINANCING THE SRAV

49. STRENGTHEN THE OWNERSHIP OF SRAV AND DEVELOP IT IN COLLEGES

5. ESTABLISH A PROACTIVE FRAMEWORK

In view of the changes in cycling and the real economic prospects that exist, it is essential to put in place a clear and proactive framework of actions to enable this development. Creation of a sector committee for economic players in the cycling sector, implementation of a real policy of professional training in the various cycling professions, clarification of incentives for cycling and aid for infrastructure development… the measures we need to take must be worked on with the players in the sector, they must be clear to all and ambitious. Finally, the 2018 cycling plan must be updated this year in order to define a budgetary framework that will enable us to fully develop cycling in our country in the years to come, while integrating the issues that have emerged since its launch and that had not been identified at the time.

A. Building an identified and strong industry

Whether it is the manufacture of bicycles, parts or accessories, the construction of infrastructures, the development of services, repair workshops or sales outlets, whether it is a question of everyday cycling, sport or leisure activities, the development of bicycle tourism or cyclo-logistics, there are many players involved in cycling in France. They are present in many areas and organised within several professional or user associations. The beginnings of territorial organisation exist, such as in the Auvergne Rhône-Alpes region with the MAD cluster or the Vélo Vallée in Occitanie.

Source : Business France, 2021

Today, at a time when cycling is growing and the economic prospects are real, the cycling industry appears to be fragmented, or at least illegible. The direct consequences are that it is difficult to construct a real economic policy for cycling, and that it is difficult for the public authorities to understand the players, the prospects and the needs of the sector. This lack of clarity partly explains the absence of the bicycle economic sector in the France Recovery Plan presented in October 2020. In addition, many economic or public players also find it difficult to identify the structures or players to contact to start up or develop a cycling project or even to relocate part or all of their activity in France

The multiple actors of the cycle in France

Today, the world of cycling is represented to the public authorities and stakeholders by a multitude of players, all of whom are very committed to their mission, but who interact relatively little and have complementary, sometimes dissonant voices.

USC - Union Sport et Cycle
Some of the economic players in the sector are represented within the Union Sport et Cycle. The USC is the leading professional organisation in the sports sector. It brings together more than 1,400 companies, 500 brands, 3,000 sales outlets and more than 2,000 sports facilities. Its raison d'être is to promote physical and sports activities, including cycling and active mobility.
The USC is composed of five colleges: manufacture of sports equipment (more than 500 brands), distribution of sports articles (large and specialised chains), rental of sports articles (in particular winter sports), commercial sports leisure activities (sports halls, climbing, fitness, yoga) and all the players in the cycle and active mobility sector (distribution, manufacture of bicycles and components): approximately 100 members. The USC thus brings together many cycle manufacturers, but membership is subject to criteria that exclude many players in the sector (criterion of 50% of turnover on bicycles). Manufacturers such as Seb or Valeo cannot be members.

Mobilians (ex CNPA)
Mobilians also represents distributors and repairers. The former Conseil National des Professions de l'Automobile (CNPA) is the only professional organisation to represent the 21 professions in the distribution and services of automobiles, industrial vehicles, cycles and motorbikes in France:
Bicycles are part of the two-wheeled sector, along with motorbikes and scooters. Of the 22,000 members of the CNPA, there are between 2,500 and 3,000 bicycle repairers, i.e. less than 15%. Mobilians manages the training of repairers and bike shops and their collective agreement and pension scheme. 500 people trained each year, via the INCM (national institute for cycles and motorbikes) on 12 sites throughout France

The two main players in the bicycle industry do not have the cycle as their core business: sport on the one hand and the car industry on the other. This could explain why the economic players in the cycling sector are currently not very visible to the public authorities.

APIC - association for the promotion and identification of cycles
APIC was created as part of the cycling plan to carry the cycle identification file in 2020. The association is also responsible for the "May by Bike" festival. Co-chaired by FUB and USC, APIC's members include the local authority associations Club des villes et territoires cyclables and Vélo et territoires and the sports federations FFC and FFVélo. It wishes to represent the entire bicycle economy and has begun to reflect on the structuring of the sector by hiring a mission director.

Association des artisans du cycle
This association represents around forty cycle craftsmen (100 jobs), who produce around a thousand custom-made bikes. The association was created in 2016 and is carrying out a machine competition. Most of the companies are growing.

Les Boites à vélo France
The Association Les Boîtes à Vélo - France encourages and supports bicycle entrepreneurship in France.
Its objective is to promote the use of the bicycle as the main mode of professional travel. In 2021, it has 270 companies representing between 750 and 800 FTEs, including 18 member bicycle manufacturers.

Happy Cycling
Created in 2010, Heureux cyclage is the national network of bicycle repair workshops. There are 330 workshops throughout France, representing 200 FTEs who run bike workshops and provide training in mechanics. The association has a role of animation and training, particularly on re-employment. Repair workshops are growing rapidly, increasingly in sparsely populated areas and in rural areas.

While the structures of the economic players are fragmented and relatively invisible in the defence of the bicycle as an economic issue, at the same time the associations of users and local authorities are very visible and carry the advocacy of the bicycle.

FUB

On the user side, FUB has established itself as a key player, particularly active in proposing changes to regulations and support policies, but also as a direct player in the development of EEC programmes for cycling. It is its president, Olivier Schneider, who is the real advocate for cycling in France today. FUB currently has more than 430 associations of urban cyclists.

Local authority associations

On the local authority side, two players coexist. The Club des Villes et Territoires Cyclables et marchables mobilises and supports local authorities in the development of cycling in their areas. It currently has 221 member local authorities representing more than 2,000 territories (towns, public establishments for inter-municipal cooperation - EPCI, departments, regions, mixed unions, mobility organising authorities) and includes the issue of walking in towns.

The Vélo & Territoires Association has nearly 150 members, initially mainly departments and regions. A generalist, it was originally specialised in bicycle tourism and less dense areas.

The two organisations share many members. They are complementary and work closely together.

Finally, new economic players are appearing, startups and other self-service bicycle models, company bicycle services, some of which are represented within the "Alliance des mobilités" created two years ago by Mobilians.

Finally, the FFC, the French Cycling Federation, and the FFvélo, the French Cycling Federation, are the two sports federations representing cyclists.

The geography of the associations on a European scale is different.

ECF: The European Cyclists' Federation (ECF) is the voice of European users and represents organisations from 40 countries with over 500,000 active members. ECF stimulates and organises the exchange of information and expertise on cycling-related transport policies and strategies, Euro-Routes and the work of the cycling movement, particularly with regard to the European Commission.

CIE: Cycling Industries Europe brings together all the members of the entire cycling industry, from bicycle and component manufacturers, bike sharing, cyclo logistics, services, infrastructure, tourism and consultancy.

Conebi and EBMA are working alongside them.

CONEBI - Confederation of the European Bicycle Industry - is the federation of the bicycle, EAB, components and accessories industries. Its members are the national associations, the USC for France.

EBMA, European Bicycle Manufacturers Association, represents the European bicycle industry on trade issues, including anti-dumping policies.

All the players in the cycling industry, whatever their category, are now fully aware of the problems posed by their fragmentation and sometimes even their divisions. They want to structure a real French cycling industry capable of supporting the development of cycling in our country and its economy.

Two actors could be the receptacle of this sector, the USC and Mobilians, but both have certain limits. According to its current statutes, USC can only welcome companies that make more than 50% of their turnover from cycling. Moreover, USC's initial vision is focused on sports and it also represents other sports and leisure sectors. Mobilians, on the other hand, is far too much marked as a player in the automobile sector above all. One last very recent player could also have played this role, APIC, the association created by FUB and USC to implement the bicycle marking system from 1 January 2021 and to promote cycling with "mai à vélo". Although this structure has the advantage of being able to carry out concrete projects, it may also seem constrained by its mission to identify bicycles, even though it also promotes cycling. Its model, which brings together manufacturers, users and local authorities, is relevant, but I think it will be difficult to make it evolve into a real sector committee.

In this context, and in order to be able to bring together all the players concerned, I recommend the creation of an industry committee of economic players in the bicycle sector. This industry committee should address the following seven issues:

- To bring together all the players and companies working and developing in the bicycle sector and to set up a directory of companies and players;
- Participate in the definition of fiscal, budgetary, normative and professional training policies that will enable us to build a real cycling policy in France over the long term. We must get out of the fiscal and regulatory tangle in which we find ourselves today, which is moreover a tangle of rules that are often modified every two or three years, in order to ensure the implementation of a clear, legible and lasting framework;
- To be an identified and effective point of entry and contact with the European and national public authorities;
- Create and develop relations with other economic sectors by setting up inter-sector challenges;
- To ensure the animation and networking between the different regional clusters of the bicycle actors which are in the process of being structured;
- Organise the structuring of the second-hand market in this sector and the reparability indices for bicycles and batteries;
- Support the creation and development of the France vélo label, a label that brings together French cycling stakeholders and certifies the quality of the entire sector, and federate the "French team" in its international representations.

As regards the structuring of the sector into a committee, under associative status, I propose to draw inspiration from the model of other sectors such as the new energy systems sector. It should be organised into several colleges. Three scenarios can be proposed:

- Scenario 1: a sector committee mainly focused on industrial issues

In this scenario, the sector committee would be composed of a central college bringing together the various industrial players and several partner colleges associated with the decisions of the sector and its projects according to needs and themes. Particular attention should be paid to the representation of VSEs and SMEs and craftsmen within the industrial players. The partner colleges would be as follows: college of users and practices, college of cycle services, college of cycle tourism stakeholders, college of cycle tourism, college of infrastructure. In a way, this scenario would be similar to what has been built in Portugal with the Abimota association, i.e. a cycling industry that assumes a strong industrial ambition.

- Scenario 2: a sector committee of economic players in the bicycle industry

In this scenario, the sector committee would be made up of several colleges that would sit equally. These colleges would bring together all the players and would be as follows: a college of cycle industry players (in which companies producing bicycles or bicycle parts or accessories would sit), a college of craftsmen, a college of users and cycling practices (in which user and local authority associations would sit in particular), a college of cycling services, a college of infrastructure, a college of cycle logistics players, and a college of cycle tourism. A consultative partner college would bring together the various regional clusters.
This scenario is the one that most closely corresponds to the constellation of cycling players in France today.

- Scenario 3 A sector committee focused on territorial organization

In the absence of any real structuring of the sector at national level, the beginnings of structuring of the sector into clusters have been created in the regions: in Auvergne Rhône Alpes with the MAD, in Occitania with the Vélo Vallée du Gers. Two others are beginning to take shape around the Centre-Val-de-Loire and Pays de la Loire regions, and in the Grand Est region. The third scenario would be to organise the sector around these territorial clusters by involving several partner colleges bringing together national associations of bicycle manufacturers, repairers, infrastructure, users, craftsmen, various services and bicycle tourism.

The three scenarios presented here are intended to initiate discussion between the players, who must first define the exact scope, composition, funding and operating rules, as well as the objectives of the sector.

To achieve this, I recommend that a general meeting of the cycling industry's stakeholders be held between March and June 2022, with the aim of creating the industry in July 2022, during the month in which the Tour de France takes place. Such an approach could also be inspiring for other sectors that are currently facing major challenges of change, such as the automotive sector for example.

50. FORMALISE THE CREATION OF A SECTOR COMMITTEE ACCORDING TO ONE OF THE THREE SCENARIOS PROPOSED (INDUSTRIES AT THE HEART AND SEVERAL ASSOCIATED COLLEGES / COLLEGES AT THE SAME LEVEL / WITH OR WITHOUT THE ASSOCIATION OF CLUSTERS) IN ORDER TO HAVE A STRONG INTERLOCUTOR AT NATIONAL LEVEL ON THE BICYCLE ECONOMY

51. LAUNCH A GENERAL REVIEW OF CYCLING STAKEHOLDERS BETWEEN MARCH AND JUNE 2022.

the example of the "New energy systems" sector

This sector brings together all the industrial players in the energy transition (renewable energies, hydrogen, energy efficiency, energy networks and storage). They represent more than 40 billion euros in turnover and more than 210,000 jobs in France...

The Strategic Committee of the Sector - CSF - launched in 2018, is an association whose objective is to "develop New Energy Systems Industries in France to lead a competitive energy transition at the service of the population, by developing the industry and employment".

Operating on the basis of a sector contract that engages all the players, the State, industrialists, trade unions, associations and competitiveness clusters, the CSF brings the players together, encourages projects, and highlights the opportunities offered by the public authorities, in particular within the framework of the fourth Future Investment Programme and France Relance.

Some exemplary projects include

- encouraging the pooling of low-carbon hydrogen resources, contributing to the deployment of multi-use basins for this energy;

- the creation of a directory of New Energy Systems actors;

- the contribution to a prospective study on "Jobs and Skills in the electricity sector in France", which identified weak points and the necessary corrective actions;

- the setting up of a "decarbonation platform" to enable supply and demand to meet;

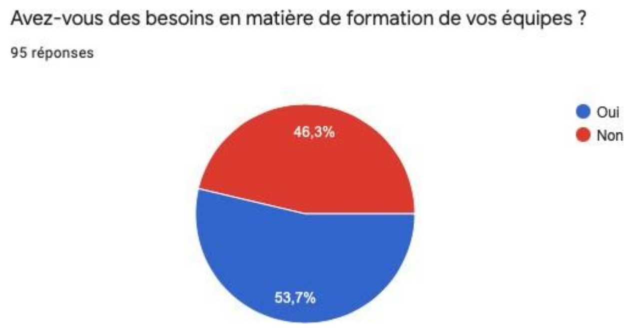
- the creation of an ETI club, a real place for dialogue and exchange and a relay between ETIs, the State and large groups, and an export club, aimed in particular at promoting French value chains when they are deployed abroad;

- or finally the Energy Challenges: born during the health and economic crisis, these challenges aimed to offer commercial outlets to the suffering aeronautics industries, which wished to diversify, while at the same time the energy sector expressed needs for local production. The Energy Challenges merge these two complementary dynamics by bringing together players around specific and very concrete industrial issues (an industrialist expresses a precise need, which becomes the challenge, to which the players in the sector respond in a competitive manner, allowing the creation of a win-win situation, and for the latter, diversification and new outlets). In 2020, 43 challenges were presented and led to 20 industrializations.

A. Training for all cycling professions

A shared observation: a need for training

Throughout our mission, we noted a lack of expertise, a need for training and an increase in skills in the bicycle system in general. Thus, 54% of the hundred or so bicycle companies that responded to our online questionnaire stated that they needed training for their teams.



What types of training do they mention?

- Half of the replies refer to training for qualified repairers, in particular to work on electric bikes;
- For 20% of the responses, it is about training in the design and manufacture of cycles, on the frame, welding, and the assembly of bicycles, particularly top-of-the-range ones. There are no training courses in France to date;
- For 15% of the responses, the training requested is related to cycle logistics: piloting, training for delivery drivers and cycle specialists;
- For 10% of the responses, the training required is related to management, marketing and sales;
- A few responses noted the need to train local authority workers and town planners.

Overview of bicycle training in France

Technical training

- To date, the existing training courses for the bicycle professions concern the field of workshop repairs, sales, and learning to ride a bicycle for sport or utility purposes. The main diplomas recognised by the State to date are professional qualification certificates (level 3 RNCP):
- The CQP Cycle Mechanic trains more specifically in repair and maintenance (RNCP level 3, i.e. CAP level, Mobilians and USC are in charge of certification);
- The CQP Cycle Technician trains in the repair and sale of bicycles. To follow this training, a CAP/BP is necessary;
- The CQP mountain bike tracker trains in the maintenance and safety of downhill mountain bike sites;
- The CQP bicycle mobility educator.

The CQP Cycle training courses are provided by several organisations such as the INCM - l'institut national du cycle et du motocycle - (Mobilians) which has several training centres or Sup de Vélo. USC and Mobilians are in charge of certification. The training courses for sales/maintenance/repair are therefore short courses at worker level. There is no national education diploma specific to cycle maintenance and trade, as there is in initial training of the CAP/BP type in the automotive field (dedicated vocational school, CFA).

Long-term training courses lead to state diplomas and professional certificates, but exclusively in the field of sports or leisure cycling:

[13] It should be noted that there is no website listing all current training courses.

- The State Diploma of Youth, Popular Education and Sport, specialising in sports development, DEJEPS, with a specialisation in mountain biking (BAC+2), enables you to supervise all mountain biking disciplines;
- the BJEPS cycling activities allows you to supervise cycling, mountain biking and tourist trips.

Short continuing education courses provide training in specialities such as the VAE, hydraulic brakes and urban cycling.

In response to the shortage of training courses dedicated to cycle repair and in the context of the "coup de pouce vélo", in May 2020 FUB launched a "cycle trade academy" designed to train mechanics "in response to the growing demand for repairs" of bicycles. This academy is financed to the tune of two million euros by CEE over the period 2020-2022. The 20-day training course, in partnership with the INCM, provides a core of skills that can be used immediately. The aim of the cycling academy is to develop technical guides, a web platform and training materials, but also to train cycling experts at all levels (mechanics, trainers, etc.). However, there is no professional title or recognised diploma issued at the end of the training.

Concerning cycle design and manufacture, there are occasional partnerships between training institutes belonging to the UIMM (Union des industries et des métiers de la métallurgie) and cycle manufacturers. We have seen this in the field at MFC and Moustache. There is no training leading to a diploma in cycle manufacturing in France today, even though there is a real need for manufacturing, particularly in the context of VAE (electronics and electricity). More generally, we must better promote industrial training, which is essential for the modernisation of tools, which are increasingly digital. Industry must be a path of excellence and not an escape route; cycling can attract many profiles. In the context of the reconversion of employees from the automobile industry to the cycle industry, specific training courses could be created, in particular to consider the specificities of the VED.

Similarly, we are not aware of any public works training courses that include elements on the construction of cycle facilities. The sector could usefully reflect on a new reference system for cycle trades, and therefore on new diplomas recognised by France Compétences.
We also welcome the Génération Vélo programme, which aims to accelerate the deployment of the SRAV by funding training for people working with children aged 6 to 11.

Training in public cycling policies

All of the players we met share the need to reflect on the whole of the professional reference framework for cycling today, whether on the part of manufacturers or on the part of experts, in order to develop cycling in urban and regional planning policies.

For several years, Cerema has been defining the national technical doctrine in conjunction with local authorities, associations and design offices, and providing direct assistance to territories in the form of studies and training. In 2021, 70 two-day training courses on cycling facilities will be held, enabling 700 professionals to be trained. ADEME also runs training courses as part of the Avelo (1 and 2) scheme, which concerns more than 600 territories. Associations of local authorities (CVTC and Vélo & territoires) have also developed cycling training courses, often for their members.

To disseminate expertise on cycling and more broadly on active mobility, FUB created ADMA, the Academy of Experts in Active Mobility, in 2020. This three-year programme is financed to the tune of 6 million euros within the framework of the EEC. In addition to the creation of a web portal of knowledge on cycling and pedestrian expertise, ADMA aims to train experts on active modes and has designed training courses for local authority staff, elected representatives and the general public.
local authorities, elected representatives and user associations, and subsequently for company employees. These are short courses of varying duration, from 6 hours to 14 hours.

For cycling education in higher education

In universities and colleges, cycling is still best summed up in bits and pieces of lectures given by passionate people, often professionals. The ADMA programme also aims to have an impact on initial training in a number of fields (construction and public works engineers, urban planners, architects, political science, logistics, management (HR), social action, etc.), where active mobility does not currently have its own expertise. Partnerships are underway with universities.

There are no training courses on the place of the bicycle in the city, on the bicycle as a mode of transport. There is little data available and research is fragmented. Few theses are currently devoted to cycling, whereas the current boom in cycling policies needs to be better documented. Research on cycling in cities has developed considerably, especially in the countries with the highest cycling rates (Denmark, the Netherlands). Germany recognises the development of research as a major topic in its cycling plan.

In this context, academics in Lyon, for example, had thought about proposing a Cyclyon chair, which would bring together a wide range of academics working on cycling to develop long-term research projects in partnership with public and private players interested in the subject. This chair could also be used to produce teaching materials to deliver modules dedicated to cycling, which could be disseminated in all training courses related to urban and regional planning policies. Other initiatives of the same type are currently being developed. All this needs to be structured and financed.

52. REVIEW THE BICYCLE TRADE FRAMEWORK

53. CREATE NEW DIPLOMA COURSES FOR ALL CYCLE PROFESSIONS

54. MAKE CYCLING MODULES COMPULSORY IN ALL PROFESSIONS IN THE FIELDS OF MECHANICS, URBAN PLANNING, ENGINEERING AND TOURISM

55. PROMOTE UNIVERSITY RESEARCH ON CYCLING

A. Provide strong incentives for cycling

There are many schemes for those involved in cycling, for local authorities that have to implement a cycling policy, for individuals or companies that wish to acquire a bicycle or switch to a bicycle for their journeys. Despite their territorial nature and often limited duration, these schemes are still not well known by our fellow citizens, even though they are increasingly sought after. 187,000 in 2020, they reached 2 million euros in 2021 according to the DGTIM. Although this figure shows a positive trend, its low level should make us wonder what decisions need to be taken to accelerate the use of these incentive schemes for cycling. I recommend that we really clarify the different aid schemes that exist and that we fully assume the implementation of a policy to develop cycling as a mode of transport.

Clarify aid for bicycle acquisition

With regard to the territorial aids that can be set up by the various levels of local authorities and which are sometimes limited in time, there is a need to move towards permanent schemes that are clear to all, that comply with the same rules of application depending on the territory and that take account of individuals' resources in order to avoid windfall effects. In order to provide clarity and social justice, the regions could be given exclusive responsibility for the bicycle purchase aid schemes. Furthermore, with regard to State aid to individuals for the purchase of an electric bicycle, which is conditional on the existence of aid from the local authority, and which currently appears to penalise the inhabitants of areas that have not yet implemented a cycling policy, I propose that it be abolished and that the budget allocated to this scheme be transferred to the regions so that all of them implement such a scheme without exception.

On the other hand, it has been observed that certain schemes that could be of real interest, such as the opening up of the conversion premium for the purchase of bicycles, are rendered ineffective because they are too complex, limited in time and totally lacking in communication about their existence. With regard to opening up the conversion premium to the acquisition of bicycles and cargo bikes, I recommend making this scheme permanent from 2023 and revising the scales upwards, particularly that for the acquisition of a cargo bike. A large-scale communication campaign should accompany this announcement. In addition, a public simulator of existing aid for the purchase of a bicycle (EAB or cargo bike) would be essential.

Making the sustainable mobility package compulsory

Finally, still on the subject of encouraging the use of bicycles as a mode of transport, let us work with all the social partners and employers' organisations on the gradual generalisation of the sustainable mobility package to all employers with more than 11 employees by 2027 and on the introduction of the mobility voucher. Let us also align the level of the sustainable mobility package introduced in the civil service at a level of 200 euros with the level in the private sector, i.e. 500 euros - 600 euros if combined with public transport. In the context of the current energy crisis, let's get out of the intermediate situation in which we find ourselves with this scheme and put in place a real scheme accessible to everyone and allowing anyone who has the possibility to diversify their means of transport.

Simplifying aid to local authorities

The work of clarifying existing public aid for the development of cycling must also be done with regard to aid to local authorities for the construction of cycling infrastructure. Here too, there is a wide variety of schemes, whether for the construction of cycle paths (active mobility funds or DSIL) or parking spaces (Alvéole), and they are often limited in time. Vélo & Territoires is carrying out this work to identify aid to local authorities14. Moreover, they are very rigid and lack flexibility, which is an obstacle for a number of local authorities, particularly those that would need this public aid to help them launch their cycling policy over several years.

We need to bring all the schemes together within the active mobility fund and review the rules for allocating aid from this fund, taking greater account of territorial realities. In addition, beyond the work of clarifying budgetary aid, we must launch the work of harmonising the rules for the construction of cycle paths and their signage and clarify the rules on the obligation to provide cycle spaces in public spaces, by disseminating the good practices developed by Cerema, etc.

For reasons of safety and the proper cohabitation of users, cycle paths must also be reserved for active forms of mobility, and there is no place for electric scooters, for example. Beyond the road safety issues, the authorisation of electric scooters, which are in fact mini-scooters, could have a real negative impact on our bicycle industry. We could observe the same phenomenon as that observed in the 1960s with the development of the motorbike.

14 https://www.velo-territoires.org/politiques-cyclables/financement/#

Clarifying and updating current standards

Finally, during the mission, several stakeholders also pointed out to me the need to modernise the normative framework for certain bicycle components, in particular concerning lighting in order to make it possible to have several lights on the back (on the bicycle and on the helmet, for example), or to install indicators, to review the regulations limiting the speed of EABs to 25 km/h (to bring it up to 30 km/h) and limiting the power of EAB and cargo bike engines to 250 watts. On these subjects of standards, I noted very different positions from one actor to another. In view of this lack of consensus, I think that the industry will have to carry out work in order, firstly, to reference all the standards applicable to bicycles and, secondly, to study the possible modifications to be proposed. Concerning the standards applicable to bicycles, their design and manufacture, it nevertheless seems to me essential to work urgently on the definition of the standards that apply to cargo bikes, as the framework does not exist today.

These are just a few examples of standards that could be clarified and simplified in their general application and known to all. In any case, it will be up to the sector committee to address these subjects with precision and intelligence.

56. CLARIFY THE AID SCHEMES FOR THE ACQUISITION OF A BICYCLE BY TAKING INTO ACCOUNT THE CONDITIONS OF RESOURCES:

57. BETTER TARGET THE GROUPS THAT CAN BENEFIT ACCORDING TO THEIR RESOURCES AND ABOLISH THE STATE SCHEME BY TRANSFERRING THE BUDGET TO THE REGIONS.

58. MAKE THE SUSTAINABLE MOBILITY PACKAGE COMPULSORY BY 2027 FOR ALL EMPLOYERS WITH MORE THAN 11 EMPLOYEES AND RAISE THE CEILING OF THE PACKAGE IN THE PUBLIC SECTOR TO 600 EUROS.

59. HARMONISE THE RULES FOR THE CONSTRUCTION OF CYCLE PATHS

60. PROHIBIT THE USE OF ELECTRICALLY POWERED BICYCLES ON CYCLE PATHS

61. DEFINE THE STANDARDS APPLICABLE TO CARGO BIKES

A. Boosting the Cycling Plan

On 14 September 2018, Prime Minister Edouard Philippe, accompanied by the Ministers of Ecology, François de Rugy, and Transport, Elisabeth Borne, presented the first cycling plan aimed at developing the practice of everyday cycling and active mobility in France. This plan, which has been awaited for many years by users and their associations, has been built around three major axes aimed at removing the main obstacles to everyday cycling:

- Firstly, the creation of the Active Mobility Fund, which aims to develop the construction of cycling infrastructure and which is endowed with €350 million over 7 years. This fund was increased by €100 million at the start of the Covid crisis in spring 2020 and operates via a call for projects that has been increasingly successful year after year;

- Secondly, the creation of a compulsory marking system for new bicycles from 1 January 2021, a system aimed at combating bicycle theft, a major phenomenon in France. Every year nearly 300,000 bicycles are stolen;
- Thirdly, the implementation of a plan aimed at developing the learning of cycling from the youngest age in our country and called "Know how to ride a bike".

It should be noted that a fourth particularly important point was included in this plan with, based on the commitment and work of MP Matthieu Orphelin, the transformation of the kilometre allowance for cycling into a sustainable mobility package. This package, which was initially implemented on an optional basis at 400 euros, has been increased to a ceiling of 600 euros, which can be combined with the reimbursement of a public transport ticket. The amount is surprisingly set at 200 euros for civil servants.

This cycling plan of 14 September 2018 presented a real step forward in the development of the State's cycling policy in France. First of all, it sends an important signal about the importance of this mode of transport. This signal has had a knock-on effect on other institutional and territorial players in our country. This plan has then structured the architecture of our cycling development policy since 2018 and we have been able to rely on it to push forward the provisions relating to cycling in various important laws, such as the Bicycle Law. This plan of course served as a framework allowing for the significant development of cycling at the beginning of the Covid crisis with the deployment of coronapists and the Coup de pouce vélo.

Since its launch in 2018, the bicycle plan has demonstrated its value as a transport policy that must be deployed over time. It is therefore important to look today not at how we can build a new cycling plan, but how we can update this plan and announce this update on its anniversary date of 14 September 2022.

Indeed, since 2018, the implementation of the bicycle plan has revealed certain needs for updating.

Firstly, the mobility fund. This fund must be built on the basis of the inhabitants' needs. It must maintain the objective of increasing the modal share of cycling to 9% of journeys as quickly as possible and set the annual expenditure objective for cycling at €30 per year per inhabitant. This should lead to an active mobility fund of €400 million per year.

In addition, the methods for allocating aid to local authorities must be reviewed in order to move from an annual to a multi-year approach, from a subsidy approach to an endowment approach, from a communal approach to an inter-communal approach. It should also allow us to reinforce the development of infrastructures in dense areas as a priority by increasing the support threshold for communities from 20% to 50%. Finally, this fund should enable us to finance cycle paths and parking facilities.

In addition, the bicycle plan must integrate the subjects that were not identified in 2018. I am thinking in particular of the subjects of repair and maintenance, the construction of the economic sector, cycle tourism and the development of cycle logistics. We must move away from the logic of sub-sectoral plans to a logic of real planning of our cycling policy in all its dimensions and integrate into the cycling plan all the subjects that contribute to the development of cycling and its ecosystem.

61. UPDATE THE CYCLING PLAN FOR THE YEAR 2022
62. INTEGRATE INTO THE CYCLING PLAN THE SUBJECTS NOT ADDRESSED IN 2018: REPAIR, LOGISTICS, INDUSTRY
63. INCREASE THE AMOUNT OF THE BICYCLE PLAN TO 400 MILLION EUROS PER YEAR FOR INFRASTRUCTURE

ANNEXES

Lettre de mission du Premier ministre

Le Premier Ministre

1 1 5 3 / 2 1 SG

Paris, le 0 5 OCT. 2021

Monsieur le Député, cher Guillaume,

Le plan vélo et mobilités actives annoncé par le Gouvernement le 14 septembre 2018 avait pour objectif de tripler la part du vélo en France pour atteindre 9 % des trajets quotidiens des Français en 2024. Depuis son lancement, de nombreuses avancées ont été réalisées afin que le vélo devienne un mode de transport à part entière. La loi n° 2019-1428 du 24 décembre 2019 d'orientation des mobilités a sanctuarisé la dotation du fonds mobilités actives à hauteur de 350 M€ sur 7 ans et, depuis 2017, ce sont ainsi plus de 12 000 km d'aménagements cyclables en site propre qui ont été ouverts, soit une augmentation de plus de 30 %. La crise sanitaire que nous avons traversée a accru cette dynamique avec le déploiement de pistes cyclables temporaires et de nombreux Français se sont durablement engagés dans cette pratique, grâce notamment au dispositif « coup de pouce vélo » qui a permis la réparation d'environ 2 millions de vélos pendant cette période.

Au-delà d'une réponse aux enjeux de transition écologique, de santé publique, de pouvoir d'achat, le développement du vélo et de sa filière économique constitue un enjeu prometteur pour notre économie, qui justifie de consolider l'essor de son usage.

L'étude « Impact économique du vélo et potentiel de développement des usages du vélo en France » (direction générale des entreprises, direction générale des infrastructures, des transports et de la mer, Agence de l'environnement et de la maîtrise de l'énergie) de 2020 estime à 78 000 le nombre d'emplois directs que représente la filière du vélo (tous secteurs confondus, de la fabrication au tourisme en passant par la réparation). Cette même étude identifie un potentiel de 150 000 à 270 000 emplois à l'horizon 2030.

Le marché du cycle a été marqué depuis plusieurs années, et singulièrement en 2020, par une croissance en valeur importante du marché du vélo. Le vélo à assistance électrique tire le marché vers le haut avec des ventes multipliées par cinq en 5 ans, hausse qui profite en premier lieu aux détaillants spécialisés.

Pour autant, selon Business France, l'essor du marché du vélo en France ne bénéficie pas encore pleinement à son industrie. Les perspectives du marché du vélo, que ce soit en valeur ou en volume, sont très positives sur les années à venir puisque les estimations à l'échelle européenne tablent sur un marché annuel de 30 millions de vélos d'ici 2030. En termes de volumes, en 2020 la production française de vélos a atteint 660 000 unités, contre presque 3 millions de vélos fabriqués au Portugal (alors que ce pays produisait en 2010 le même volume de vélos que la France aujourd'hui).

.../...

Monsieur Guillaume GOUFFIER-CHA
Député
Assemblée nationale
126, rue de l'Université
75007 PARIS

L'écosystème du vélo étant relativement dynamique dans notre pays, il apparaît que l'économie française gagnerait à ce que la production de cycles sur le territoire français soit renforcée. En effet, il existe de nombreuses associations d'usagers, d'élus, de professionnels, des salons professionnels, des organismes de formation aux métiers du cycle, des clusters d'innovation...

Pour autant, le secteur économique du vélo est souvent perçu comme un secteur anecdotique, parcellisé et à faible valeur ajoutée.

Au regard de ces constats, je souhaite donc vous confier une mission visant à identifier les perspectives et les freins au développement du vélo d'un point de vue industriel, économique et d'emplois dans notre pays. À cette fin, votre mission s'attachera en particulier à établir un état des lieux des forces et faiblesses de l'industrie du vélo en France, en y incluant la fabrication des vélos et des pièces détachées, mais aussi le secteur de la vente et de la réparation, très pourvoyeur d'emplois et des services (locations, start-up du numérique, cyclo-logistique, etc.).

Les axes suivants pourront en particulier être approfondis : l'identification des leviers de nature à permettre l'augmentation de l'industrialisation en France et la création de valeur ajoutée sur le territoire, avec des stratégies d'innovation à faire émerger et des perspectives d'exportation sur un marché européen et mondial en forte croissance ; l'identification des perspectives et besoins en matière d'emploi et de formation sur l'ensemble de cette filière économique mais aussi des territoires les plus propices dans lesquels cette relocalisation pourra être effectuée ; la valorisation des synergies avec les autres secteurs économiques du vélo, notamment le tourisme ou le sport de haut niveau ; la valorisation du caractère positif de la filière en termes de recyclabilité, de transition écologique, d'insertion par l'emploi.

Vous veillerez à mener votre travail de réflexion en concertation étroite avec l'ensemble des acteurs concernés.

Pour la conduite de cette mission, vous bénéficierez de l'appui des services du ministère de la transition écologique, notamment de l'appui technique du Conseil général de l'environnement et du développement durable et de la direction générale des infrastructures, des transports et de la mer.

Vous veillerez à élaborer vos recommandations dans le respect des règles d'indépendance, d'impartialité et d'objectivité qui s'imposent au titre de la loi n° 2013-907 du 11 octobre 2013 relative à la transparence de la vie publique, et à m'informer des éventuelles mesures prises à cet effet.

Un décret vous nommera, en application de l'article L.O. 144 du code électoral, parlementaire en mission auprès de Mme Barbara POMPILI, ministre de la transition écologique, M. Bruno LE MAIRE, ministre de l'économie, des finances et de la relance, de M. Jean-Baptiste DJEBBARI, ministre délégué auprès de la ministre de la transition écologique, chargé des transports, et de Mme Agnès PANNIER-RUNACHER, ministre déléguée auprès du ministre de l'économie, des finances et de la relance, chargée de l'industrie.

Vous veillerez à leur présenter des points d'étape réguliers et à rendre votre rapport dans un délai de trois mois.

Je vous prie de croire, Monsieur le Député, à l'assurance de mes salutations les meilleures.

Bien cordialement

Jean CASTEX

Visits to industrial sites and companies in the bicycle industry

As part of the Tour de France organised by the Club des Villes et Territoires cyclables

date	site	*Production / activities*
31th may 2021	Cycleurope, Romilly sur Seine, Grand Est	*Bicycle assembly factory*
9th july 2021	Moustache, Épinal, Grand Est	*Assembly factory for mountain bikes and mountain ebikes*
30th august 2021	Arcade cycles, la Roche-sur-Yon, Pays de la Loire	*Bicycle assembly factory*
31th august 2021	Manufacture française du cycle - MFC, Machecoul, Pays de la Loire	*Bicycle assembly factory*

In the context of the mission entrusted by the Prime Minister

1st October 2021	Cyclelab, cluster Vélo vallée, Isle Jourdain, Occitanie	*Logistics for bike shop network and training school*
16th november 2021	Fleximodal, Rennes, Bretagne	*Production of bicycle trailers*
17th november 2021	Doctibike, Villeurbanne, AURA	*Repair of electric bicycle batteries*
	Velogik-estime, Villeurbanne, AURA	*Workshop for bicycle renovation through integration*
	Yokler, Villeurbanne, AURA	*Production of cargo bikes*
	Mach1, Marclopt, AURA	*Production of rims and spokes for bicycle wheels*
	Altinnova, Saint-Etienne, AURA	*Production of bicycle shelters*
18 november 2021	Mavic, Annecy, AURA	*Wheel production*
	Bikle, Annecy, AURA	*Production of ebikes*
	Quaddrix, Annecy, AURA	*Production of all-terrain bicycles adapted for people with disabilities*
19 november 2021	Douzecycles, Dijon, Bourgogne-Franche-Comté	*Production of cargo bikes*
	Lapierre, Dijon, Bourgogne-Franche-Comté	*Bicycle assembly factory*
	Seb/Angell bike, Is-sur-Tille, Bourgogne-Franche-Comté	*ebike production factory*
23 november 2021	RTE, Porto, Portugal	*Bicycle assembly factory*
	Triangles, vallée de l'Agueda, Portugal	*Production plant for aluminium bicycle aluminium frames*
24 november 2021	Abimota, vallée de l'Agueda, Portugal	*Portuguese Federation of Industrial Bicycle Manufacturers*
	Miranda, vallée de l'Agueda, Portugal	*Bicycle parts factory*
3 décember 2021	Décathlon, Lille, Hauts-de-France	*Design office and assembly factory for bikes*
	Norauto-Mobivia, Hauts-de-France	*Car and bicycle sales and repairs*
10 january 2022	Zéfal, Jargeau, Centre Val-de-Loire	*Bicycle components and accessories factory*

ENGLISH VERSION

List of hearings and persons met

INSTITUTIONS AND ASSOCIATIONS

ADEME, Agence de l'environnement et de la maitrise de l'énergie - *5 November 2021*

- Elodie TRAUCHESSEC, Emerging Mobility Coordinator
- Yann TREMEAC, Deputy Head of Department, Transport and Mobility

Abimota - *24 November 2021*

- Gil NADAIS, Secretary General

Association for the Promotion and Identification of Cycles (APIC) - *8 November 2021*

- Patrick GUIGNARD, President
- Christine LAYMARD, Project Director for the "sectors" project

BPI, Banque Publique d'Investissement - *14 December 2021*

- Pierre COUTURIER, Director of Financing, Bpifrance
- Quentin CORNU-THENARD, Director of Intangible Finance
- Jérôme LEBACLE, Strategic analyst - Head of economic studies at Bpifrance Le Lab
- Reynald MARCHAL, Manager of the consulting expertise division, at the BPI's support department

Business France - *27 October 2021*

- Marie-Cécile TARDIEU, Deputy Director General in charge of attractiveness
- Pascal LECAMP, Director of Parliamentary Relations
- Olivier PRADET, Policy Officer

CFDT - *20 January 2022*

- Jean-Marie ROBERT, National Secretary for the metal industry in charge of the car and bicycle sector
- Franck DAOUT, Federal Secretary, former central delegate at Renault
- Benoit OSTERTAG, Federal Secretary of Renault on automotive CSR and employee savings

Club for Cyclable and Walkable Cities and Territories - *3 November 2021*

- Françoise ROSSIGNOL, President, First Vice-President of the Communauté d'Agglomération d'Arras
- Catherine PILON, Secretary General
- Romain LEGROS, Policy Officer

MAD Cluster, active and sustainable mobility - *10 November 2021*

- Anne-Sophie CAISTIKER, President
- Vincent MONATTE, Vice-President
- Renaud COLIN, Vice-Chairman
- Anne-Gaëlle CLOT, Cluster Manager

CNPA - *10 November 2021*

- Grégoire BILLETTE, General Secretary of the two-wheel sector
- Myriam GOUJJANE, Elected member of the two-wheel sector office
- Dorothée DAYRAUT-JULLIAN, Director of Public Affairs and Communication
- Frédéric GENEY, Head of External and Institutional Relations

Collectif Vélo Ile-de-France - *26 October 2021*

- Stein VAN OOSTEREN, Spokesperson

New Energy Systems Sector Structural Committee - *10 December 2021*

- Aurélie PICART, Director of the sector
- Christophe TRAN-DINH, Project Director

European Commission - *13 January 2022*

- Dr. Ulla ENGELMANN, DG for Internal Market, Industry, Entrepreneurship and SMEs, DG GROW
- Joan CANTON, Cabinet of Thierry BRETON

CMA France - *6 December 2021*

- Thierry BACHTANIK, Director of "support for the organisation and projects of the network" of the Chambers of Trades and Crafts, including the entire range of services for sustainable mobility
- Samuel DEGUARA, Director of Public and Institutional Affairs
- Benjamin MATTELY, Sustainable Development Officer

Directorate General of Customs and Excise - *22 November 2021*

- Guillaume VANDERHEYDEN, International Trade Director
- Yann AMBACH, Head of the COMINT office (tariff and customs policy)
- Anne-Sophie BERNERT, Head of the JCF2 office, control policy (anti-fraud department)
- Karine BORIS-TREILLE, Assistant to the Head of the COMINT office (tariff and customs policy)

Enterprise Directorate General - *9 November 2021*

- Marie DE BOISSIEU, Project Director Consumer Goods
- Muriel GRISOT, Policy Officer Directorate General for Enterprises - Sub-Directorate for Tourism
- Kevin HA, Transport Project Manager
- Uriel KAUFMAN, Consumer Goods Project Manager
- Laurence MEGARD, Deputy Director of Health Industries, Consumer Goods
- Perrine THEILLARD, Project Director for "Transport and Industry of the Future

Directorate-General for Infrastructure, Transport and the Sea - *15 and 21 November 2021*

- Thierry DU CREST, Interministerial Coordinator for the development of bicycle use
- Marc PAPINUTTI, Director General
- Olivier Milan, Deputy Rapporteur of the IOC

National School for Equipment Technicians (ENTE) - *17 December 2021*

- Olivier KLEIN, teacher-researcher

Fédération des usagers de la bicyclette (FUB) - *26 October 2021*

- Olivier SCHNEIDER, Chairman
- Thibault QUERE, Advocacy Officer

GART - *17 December 2021*

- Romain CIPOLLA, Policy Officer

High Commission for Planning - *14 January 2021*

- François BAYROU, High Commissioner for Planning
- Éric THIERS, Secretary General

Happy Cycling - 29 November 2021

- Céline ZOPELLO, Coordinator
- Pierre-Éric LETELLIER, Director

The Cycle Craftsmen - *4 November 2021*

- Vincent REBOURS, Maison Tamboite
- Aymeric LE BRUN, Manager of Cyfac

The Bike Boxes - *18 October 2021*

- Mathieu CLOAREC, Development Manager
- Gaëtan PIEGAY, Project Manager
- Philippe GENTY, Artisan cabinetmaker, vice-president

Ministry of Industry - *10 November 2021*

- Agnès PANNIER-RUNACHER, Minister
- Célia AGOSTINI, Parliamentary Advisor
- Quentin GUERINEAU, Technical Advisor

Ministry of Sport - *10 November 2021*

- Célia GUILLOTIN, Parliamentary Advisor
- Gaëlle OGER, Technical Advisor

Ministry of Ecological Transition - *19 October*

- Julien TOGNOLA, Deputy Director of the Cabinet, in charge of monitoring the implementation of reforms

Ministry of Transport - *6 December 2021*

- Simon MARTIN, Adviser on "Automobile, New Mobilities, Energy Planning in Transport and Monitoring the Implementation of Reforms" in the office of Jean-Baptiste Djebarri, Minister Delegate for Transport at the Ministry of Ecological Transition
- Margot PROVOT, Parliamentary Advisor

Mouvement des entreprises de France (MEDEF) - *7 December 2021*

- Geoffroy ROUX DE BEZIEUX, Chairman
- Guillaume LEFRANC, Advisor to the President

How to ride a bike - *15 December 2021*

- Séverine DESBOUYS, in charge of the mission for the ministers

Union sport et cycle - *5 November 2021*

- Virgile CAILLET, General Delegate
- Julien AUBIGNAT, Secretary General
- Jérôme VALENTIN, Vice-President

Vélo et Territoires - *15 November 2021*

- Camille THOME, General Delegate
- Stéphanie MANGIN, Head of the Observation Unit

ECONOMIC ACTORS

ACTIA - *25 November 2021*

- Jean-Louis PECH, CEO

Amazon - *10 December 2021*

- Charles DAVOUS, *Sustainability* Director
- Éloïse FOUCAULT, Institutional Relations

Arcade - 28 January 2022

- François LUCAS, Director General
- Frédéric LUCAS, Deputy Director

Copenhagenize - 6 January 2022

- Clotilde IMBERT, Manager of the Francophone office
- Arthur DUHAMEL, Urban Designer

Decathlon - *15 November 2021*

- Jean-Baptiste RIVIERE, Bicycle Industry Director
- François ESPEL, Leader of the bicycle assembly business unit
- Vincent POQUET, Director of the Lille assembly plant
- Bertrand TISON, European Affairs Officer

EBMA - *7 December 2021*

- Moreno FIORAVANTI, Secretary General
- Rémi VIRION, *Trade policy officer*

OLVO Company - *21 October 2021*

- Vincent DEGOVE, Experience, Customer and Quality Manager
- Paul ROUDAUT, Manager

Fleximodal - *16 November 2021*

- Charles LEVILLAIN, CEO Founder

France Vélotourisme - *15 November 2021*

- Lionel HABASQUE, Chairman and Managing Director

Cyclelab Group - *1 December 2021*
- Denis BRISCARDIEU, Director

Intersport - *9 December 2021*
- Gilles BOUQUET, CFO of the Intersport Group (Intersport France and MFC), and CSR coordinator
- Romain GARDELLE, Head of market development for bicycles, urban sliding, games and leisure

Keolis - 20 January 2022
- Frédéric BAVEREZ, Executive Director France
- Yann RUDERMANN, Managing Director of Cykleo
- Nicolas PELISSIER, Deputy Director of Institutional Relations

La Poste - *30 November 2021*
- Victor ANDRAUD, Stuart Public Affairs Director
- Jean-Louis CARRASCO, Director of Urban Logistics at Colissimo
- Maud MARCHAND, Head of Studies and Synthesis in Urban Logistics
- Rebecca PERES, Institutional and Parliamentary Relations

Cycle factory - *22 November 2021*
- David JAMIN, Director General and member of the Board of Directors of USC

Mobivia - 3 December 2021
- David SCHWARZ, CEO
- Bénédicte BARBRY, Director of External Relations, Public Affairs and Sustainable Development
- Léa DEGARDIN, Public Affairs and Innovative Projects Manager
- Jérôme CARRODANO, Norauto's *soft mobility* leader

O2Feel - *9 December 2021*
- Grégoire BRUNET, President (co-founder with Bataille)
- Guillaume BARON, Laboratory Director
- Xavier MOLEUX, Marketing Director

Octave - *4 November 2021*
- Rémy LAFFONT, Founder

PTEF - *25 October 2021*
- Laurent PERRON, Automotive industry project manager

Pyrénées Cycling Group - *9 November 2021*
- Marc DUCHESNE, Co-founder

Shimano France - *7 December 2021*
- André GHESTEM, Director France

Smove Zoov - *6 December 2021*
- Nadia GOUPIL, Head of "Cities and Business" Relations
- Caroline VON RENTERGHEM,
- Arnaud LE RODALLEC,

Stellantis - *9 December 2021*
- Paul-Antoine CHAFFANGEON, Head of Global Energy Transition
- Laurent FAVRE, Public Affairs Officer

Systra - *6 December 2021*
- Sylvie CASSAN, Business Development Director France
- Guillaume FICAT-ANDRIEU, Project Manager, Consultancy and Planning Department (based in Toulouse)

The Shift project - *25 October 2021*
- Yannick SALEMAN, Employment and Finance Project Manager
- Laurent PERRON, Automotive engineer

Valéo - 6 January 2022
- Jérôme MORTAL, Business unit
- Jean-Luc DI-PAOLA-GALLONI, Director

Vinci - *10 December 2021*
- André BROTO, Director of Strategy and Forecasting

Voltaire - *20 January 2022*
- Gabriel ECALLET, Co-founder
- Grégoire LIEURADE, Co-founder

Yuba Bike - *17 December 2021*
- Harald MARZOLF, Director France

Glossaire des sigles et acronymes

Acronyme	Signification
ADMA	Académie des mobilités actives
ADEME	Agence de l'environnement et de la maitrise de l'énergie
APIC	Association de Promotion et d'Identification des cycles
ASO	Amaury Sport Organisation
BET	Bureau d'études techniques
BFR	Besoin de fonds de roulement
BMX	Bicross
BP	Brevet professionnel
BTP	Bâtiment travaux publics
CAP	Certificat d'aptitude professionnel
CEA	Commissariat à l'énergie atomique
CEE	Certificats d'économie d'énergie
CEE	Communauté économie européenne
CFA	Centre de formation des apprentis
CMA	Chambre des métiers et de l'artisanat
CNPA	*Conseil National des Professions de l'Automobile*
COI	Conseil d'orientation des infrastructures
CQP	Certificat de qualification professionnelle
CVTC	Club des villes et territoires cyclables
DGE	Direction générale des entreprises
DGITM	Direction générale des infrastructures, des transports et de la mer
DSIL	Dotation de soutien à l'investissement local
ECF	Fédération cycliste européenne
EMD	Enquêtes ménages déplacements
ETI	Entreprise de taille intermédiaire
ETP	Effectif temps plein
FNUCI	Fichier National Unique des Cycles Identifiés
FUB	Fédération des usagers de la bicyclette

Acronyme	Signification
GES	Groupement des entreprises de sécurité
GPS	Global Positioning System
INCM	Institut national du cycle et du motocycle
LLD	Location longue durée
NAF	Nomenclature d'activités françaises
PCAET	Plans climat air énergie territorial
PLU	Plan local d'urbanisme
PME	Petite et moyenne entreprise
PMR	Personne à mobilité réduite
PTEF	Plan de transformation de l'économie française
RATP	Régie autonome des transports parisiens
REP	Responsabilité élargie du Producteur
RH	Ressources humaines
RNCP	Répertoire national de la certification professionnelle
SRAV	Savoir rouler à vélo
TPE	Travaux publics de l'Etat
TVA	Taxe sur la valeur ajoutée
UE	Union européenne
UIMM	Union des industries et des métiers de la métallurgie et des industriels du cycle
USC	Union Sport et Cycle
VAE	Vélo à assistance électrique
VLD	Vélos en location longue durée
VSL	Vélo en libre-service
VTC	Vélo tout chemin randonnée
VTT	Vélo tout terrain
VUL	Véhicules utilitaires légers
ZFE	Zones à faibles émissions

Production and import/export figures in 2020

(Sources : French Customs, Union Sport et Cycles)

On the basis of the values declared by the manufacturers and collected by the Union Sport et Cycle, the following tables can be reconstructed, which give the orders of magnitude of production.
Storage effects (significant in 2020 for children's bicycles, for example) and the time lag in declarations from one year to the next explain the differences between total production (production on the territory plus imports) and total market (national market plus exports).

French Production		
Bicycles	400	*60%*
ebikes	261	*40%*
Total	661	
Imports		
Bicyles	1 783	*81%*
ebikes	418	*19%*
Total	2 202	

French market		
bicycles	2 171	*81%*
ebikes	514	*19%*
Total	2 685	
exports		
Classique	199	*75%*
ebikes	67	*25%*
Total	265	

Total		
Bicycles	2 183	*76%*
ebikes	679	*24%*
Total	2 862	

Total		
bicycles	2 370	*80%*
ebikes	581	*20%*
Total	2 950	

The difference between the two totals is due to stock effects. *Source USC*

In terms of the balance of trade, the deficit in 2020 will be around half a billion euros (whole bikes). It could improve as high value-added bicycle manufacturing is relocated to France.

2020 values, in millions of euros

Imports		
Bicycles	Ebikes	Total
368,3	335,1	703,4
52%	*48%*	

Exports		
Bicycles		
105,4	80,5	185,9
57%	*43%*	

Difference (~ trade balance)		
Bicycles		
-262,9	-254,6	-517,5
51%	*49%*	

Detailed table of contents


“Le présent n’est pas un passé en puissance, il est le moment du choix et de l’action.”
SIMONE DE BEAUVOIR