

FAHRRADWIRTSCHAFT STÄRKEN

*jetzt am Mobility Transition
Pathway der EU beteiligen!*

Der Mobility Transition Pathway der EU

Mobilität und Mobilitätswirtschaft in Europa sollen klimaneutral, digitaler und resilient werden – und dabei zukunftsfähige Arbeitsplätze schaffen. Dazu braucht es eine innovative und wachsende Fahrradwirtschaft und mehr Radverkehr.

Die EU-Kommission will mit dem Mobility Transition Pathway (MTP) die Transformation der Mobilitätswirtschaft vorantreiben – gemeinsam mit den betroffenen Branchen. Im Januar 2024 hat die EU-Kommission einen 58-seitigen MTP-Bericht vorgestellt. Die Fahrradwirtschaft konnte zusammen mit der Auto-, Bahn- und der maritimen Wirtschaft Maßnahmenvorschläge für den MTP-Bericht beitragen – darunter 13 speziell zur Stärkung der Fahrradwirtschaft.

Jetzt ruft die EU-Kommission Branchenakteure auf, **kurze Stellungnahmen (Pledges)** abzugeben, wie sie zur Umsetzung der MTP-Maßnahmenvorschläge beitragen.

Wie pledgen?

- Die Abgabe von Pledges erfolgt in Englisch über ein [Online-Portal der EU-Kommission](#). Maximale Pledge-Länge: 1.000 Zeichen. Ein unterstützendes Dokument kann hochgeladen werden. Mehrere Pledges sind möglich.
- Ein Pledge beschreibt eigene (laufende wie geplante) Aktivitäten, die sich auf mindestens einen MTP-Maßnahmenvorschlag beziehen und ein quantifizierbares Ziel mit klarem Zeithorizont haben. Jeder Pledge wird entsprechend des relevanten Maßnahmenvorschlag einem von 21 vorgegebenen Topics zugeordnet
- Im Anhang dieses Papiers sind als Hilfestellung Pledge-Beispiele, die MTP-Maßnahmenvorschläge und ihre übergeordneten Topics sowie relevante MTP-Textstellen zur Fahrradwirtschaft dokumentiert.

Wer kann pledgen?

- Unternehmen der Fahrradwirtschaft aus Industrie, Handel und Dienstleistung
- Wirtschafts- und Berufsverbände, Sozialpartner, NGOs, Wissenschaft, Aus- und Weiterbildungsträger
- Bund, Länder, und Gemeinden sowie Institutionen der öffentlichen Hand

Warum pledgen?

- Die Aufnahme der Fahrradbranche in den MTP und die MTP-Maßnahmenvorschläge sind ein großer Lobbyerfolg. Für die politische Umsetzung sind jetzt Art und Anzahl von Pledges von großer Bedeutung.
- Wer pledged demonstriert politischen und wirtschaftlichen Gestaltungswillen und kann eigene Akzente setzen, die von EU-Entscheidungsträger:innen wahr- und ernstgenommen werden. Ein Pledge hat keine rechtsverbindlichen Konsequenzen.



Wie geht es weiter?

Ende 2024 werden die bis 1. September 2024 abgegebenen Pledges auf der MTP-Seite der EU-Kommission veröffentlicht. Später eingehende Pledges werden später veröffentlicht.

Anzahl und Art der Pledges beeinflussen den weiteren Umsetzungsprozess des MTP, bei dem die EU-Kommission die Fahrradwirtschaft weiterhin aktiv einbinden wird.

Kontakt für Rückfragen und Support

Als deutsche Branchenverbände sind ZIV – Die Fahrradindustrie und Zukunft Fahrrad direkt bzw. über unsere europäischen Partnerverbände CONEBI und Cycling Industries Europa in den MTP-Prozess der EU-Kommission involviert. Wir erstellen eigene Pledges zu übergreifenden Themen der Fahrradwirtschaft und stehen einzelnen Unternehmen für Rückfragen und Support beim Pledgen zur Verfügung.



contact@ziv-zweirad.de
Zweirad-Industrie-Verband e.V.
www.ziv-zweirad.de



politik@zukunft-fahrrad.org
Zukunft Fahrrad e.V.
www.zukunft-fahrrad.org

Anhang 1: Beispiele für Pledges

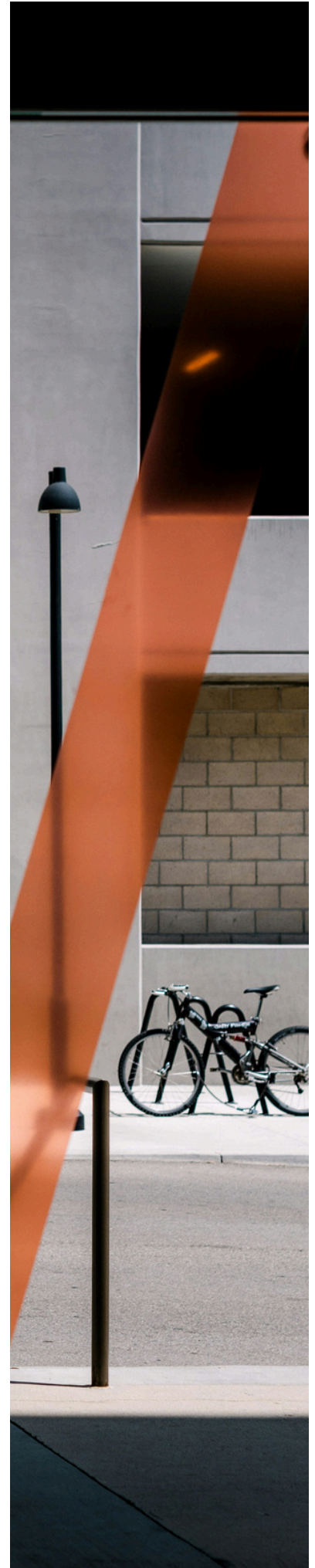
- Vorlagen für MTP-Pledges zur Fahrradwirtschaft
- Beispielhafte Pledges aus dem Tourism Transition Pathway

Anhang 2: Relevante Inhalte des MTP-Berichts

- MTP-Topics und -Maßnahmenvorschläge zur Fahrradwirtschaft
- MTP-Textstellen zur Fahrradwirtschaft



Hier pledgen!



ANHANG 1

BEISPIELE FÜR PLEDGES

zum Mobility Transition Pathway (MTP)

Vorlagen für MTP-Pledges zur Fahrradwirtschaft

Topic 5: Sustainable Competitiveness of the bicycle industry

Bis zum Jahr X ein bestimmtes Fahrradteil oder ganze Fahrräder zu Y % aus recyceltem/nachhaltigerem Material herstellen

Topic 11: Future of the working force

Bis zum Jahr X mindestens Y Personen aus von Arbeitsplatzabbau betroffenen Branchen umqualifizieren und einstellen

Topic 16: Bike innovation

Bis zum Jahr X mindestens Y Gebrauchträder wieder nutzbar machen oder in Y Städten flächendeckende Fahrradleihsysteme mit Z Rädern einführen

Topic 20: Cycling infrastructure

Bis zum Jahr X mindestens Y km Radwege oder Z Fahrradparkhäuser bauen

Topic 21: Investment and funding

Bis zum Jahr X mindestens Y kleine und mittlere Unternehmen bei der Anschaffung von Y gewerblichen Cargobikes finanziell unterstützen

Beispielhafte Pledges aus dem Tourism Transition Pathway

Neben dem Mobility Transition Pathway gibt es 16 weitere branchenspezifische Transition Pathway-Prozesse der EU-Kommission. Im Rahmen des Tourism Transition Pathway wurden von Juni 2022 bis Oktober 2023 insgesamt 424 Pledges veröffentlicht ([link](#)).

rainmaker.travel, Germany, SME, Company with less than 250 employees

Topic 3: Improving statistics and indicators for tourism

The rainmaker Tourism Cloud Platform and the Destination Network Open Platform have a feature that shows statistics and insights for the entire customer journey (Dream, Plan, Book, Experience, Share) for a destination and its businesses in a unified dashboard. It uses anonymous data to provide market intelligence for the destination and its tourism organization (DMO). The goal for 2025 is to work with at least 50 tourism authorities and destinations to make this feature available to them.

DER Touristik Group GmbH, Germany, Company with 250 or more employees

Topic 6: Sustainable mobility

DER Touristik offers a free Rail&Fly ticket with every classic package holiday. This means that all DER Touristik travellers can travel free of charge and at no extra cost by train anywhere in Germany from one of the more than 5,600 DB railway stations to the airport and back again. DER Touristik also offers trips within Germany (for example city breaks) by train. The goal is to use no domestic German flights for holiday travel by 2030.

FairAway Travel, Germany, Company with 250 or more employees

Topic 11: Easily accessible best practices, peer learning and networking for SMEs

We have implemented a partner hub with shared resources and best practice discussions for our collaboration partners in 40 local destinations, which we continue to elaborate. We will also provide online training sessions on sustainability and resilience at least 2 times a year, with an objective to have all partners having engaged in training by year 2025.

TUI AG, Germany, Company with 250 or more employees

Topic 22: Pact for skills in tourism

TUI Care Foundation will set up its online and open-source training platform called "TUI e-Academy" by 2023, to support the upskilling and reskilling of anyone working in the tourism industry. The TUI e-Academy will also help certify existing knowledge through its digital badges system. TUI will endorse these digital badges to add value to the certification that beneficiaries can earn through the platform, helping the industry to recognise learners of the TUI e-Academy platform. Furthermore, the TUI Care Foundation will offer course materials made by industry practitioners, providing innovative and thought-leading content for learners. TUI will launch its "TUI Sustainability Academy" by 2022, which will offer online learning modules for upskilling and reskilling. The platform will be made available for TUI employees first. After this first phase of implementation, the aim is to extend it to suppliers and partners of TUI Group.

TUI will launch the "TUI Sustainability Agenda Learning Module" by 2023, aimed at providing all TUI employees with a thorough understanding of the Group's sustainability agenda and focus areas; with the aim of fostering engagement and coordination across business areas.

Ministry of Economic Affairs and Communication, Estonia, National administration

Topic 1: Fair measures for Short-Term Rentals (STR)

Estonia sees the need to synchronize and harmonize rules of short-term rentals at the EU level. We will participate in process of common development and implementation of common principles, however bearing in mind that regions are different and may need different approach.

University of Tartu, Pärnu College, Estonia, Academic / Research institution

Topic 4: Comprehensive tourism strategies development or update

Developing a long view of tourism 2035 in national, local and regional level with 3 municipalities and 5 destination management organisations.

ANHANG 2

RELEVANTE INHALTE

des Mobility Transition Pathway (MTP) Berichts

Der vollständige 58-seitige Bericht "Transition pathway of the EU Mobility Industry Ecosystem" der EU-Kommission vom 26. Januar 2024 ist [hier](#) veröffentlicht.

MTP-Topics und -Maßnahmenvorschläge zur Fahrradwirtschaft

Hier sind alle MTP-Topics und -Maßnahmenvorschläge, die für die Fahrradwirtschaft relevant sind dokumentiert. 13 dieser Maßnahmenvorschläge beziehen sich explizit oder ausschließlich auf die Fahrradwirtschaft – sie sind hier rot unterlegt.

Mit Kürzeln werden die für die Umsetzung jeweils verantwortliche Akteure (Industry = Wirtschaft, EU, MS = Mitgliedsstaaten, Regions, Social partners, Unions, VET providers = Weiterbildungsträger, Academia) und der Zeithorizont (S = kurzfristig, M = mittelfristig, L = langfristig) benannt.

Topic 1: Resilience and sustainable competitiveness

1.1. Supply chains

- Contribute to the implementation of Critical Raw Material Act³⁶ objectives relevant for the mobility ecosystem: Industry | S/M
- Map the industrial needs for raw materials and streamline R&D workstreams that could mitigate those dependencies (recycling, substitutive materials, ...): Industry/MS/EU | S
- Support de-risking strategies (e.g. by facilitating offtake agreements and engagement between raw materials suppliers and EU mobility industries): Industry/MS/EU | M
- Attract investments strengthening the EU supply chains: MS | S/M
- Promote recycling and circularity to reduce the environmental/social footprint and increase resilience of the EU supply chain for critical raw materials: Industry/MS/EU | M

1.2 Level the playing field

- Provide information and concrete cases that support the activation of mechanisms with a view to ensure the level-playing field, including in the framework of trade defense instruments, the anti-subsidy regulation and the foreign subsidies regulation: Industry | S/M

Topic 5: Sustainable Competitiveness of the bicycle industry

- Strengthen market surveillance in the bike industry, aiming at level playing field with international competitors and compliance with the EU regulations⁽⁵²⁾: MS/EU | M (52): For example regarding electromagnetic field standards
- Support reshoring opportunities for bicycle components, for example through further development of automated production: Industry/MS/EU | M
- Support the development of the battery value-chain for eBikes: Industry/MS/EU | S/M
- Support the implementation of the European Commission proposal for a European Declaration on Cycling⁽⁵³⁾: Industry/MS/EU | 53 COM(2023) 566 final

[Anmerkung: Die [European Declaration on Cycling](#) wurde im April 2024 gemeinsam von Europaparlament, EU-Kommission und Rat der EU beschlossen. Sie enthält zahlreiche Aspekte der Radverkehrsförderung, die ebenfalls Gegenstand von Pledges sein können – auch wenn sie in keinem MTP-Maßnahmenvorschlag explizit genannt sind.]

- Increase investments and production capacity for a broader range of bicycles and their components in the EU: Industry | S/M

Topic 6: Regulation

6.1. Legislative framework

- Conduct comprehensive reviews of relevant legislation, with a view of ensuring the mobility ecosystem's green transition while protecting its competitiveness: EU/MS | S/M

6.2 Standards

- Get more involved and better coordinated at European level in the work of the international standardisation organizations following the last EC standardisation strategy: Industry/MS/EU | S
- Simplify the audit-led system ISO certification: EU/MS/Industry | M
- Set the standards for direct communication between connected vehicles and the grid(59): Industry | S

(59) The recently revised Renewable Energy Directive (Art. 20a) has introduced some general principles requiring vehicle manufacturers to provide access to basic battery data. The identification of a common standard for the format/frequency of these battery data is going to be addressed in the proposal on Access to Vehicle Data, Functions and Resources in the context of the Type Approval Regulation.

- Promote the establishment of standardized data sets in manufacturing and supply value chain and ensure equal access to them: Industry | M

Topic 7: Private-public governance

7.1. Governance and collaboration

- Map and clarify the role of existing partnerships and alliances relevant for the mobility ecosystem: EU/MS/Industry | S
- Provide support through the European Cluster Collaboration Platform, to set up new clusters or incorporate new companies into existing clusters specialized in broader or related topics: EU/MS | S/M
- Review the structure and the results delivered by the already existing clusters in line with global technological and industrial developments: Industry/MS | S
- Identify new areas where a collaboration between different players is needed to speed up the twin transition and enhance resilience (e.g. mobility industry and grid operators or infrastructure managers): Industry | S
- Support cross-sectoral initiatives on intermodality: EU/MS/Industry | M

Topic 8.1: Just transition – Social Dialogue

8.1. Social Dialogue

- Communicate and regularly inform the public about the impacts, risks and opportunities linked to the transition, to reduce existing uncertainties, and help stakeholders embrace the transformation and take action to adapt: Social partners/Industry/MS/EU | S/M
- Address the challenges of the transition through Social Dialogue (including the European Works Councils) with specific dialogues/working groups – at sectoral, company and regional levels – aimed at collectively defining and implementing the necessary actions for an effective and just twin transition: Social partners | S
- Incentivise transition projects that contribute to the involvement of workers and their representatives, for instance through socially responsible public procurement practices making use of social award criteria: MS | S
- Continue to support sectoral social dialogue at European level: Social partners/MS/EU | S/M
- Ensure relevant laws and guidelines are properly implemented (mainly the ILO Fundamental Principles and Rights at Work, Council recommendations on social dialogue, on fair transition, and Commission Recommendation [C(2023) 8067] on means to address the impact of automation and digitalisation on the transport workforce): Social partners/MS/EU | S

8.2. Regional Transition

- Contribute to the development of a common monitoring data dashboard for all regions affected by the twin transition, to measure the impacts and ensure the updated data is available (measure changes in the value chain, employment, GDP or tax revenues in the regions...): Industry/MS/Regions/EU | S
- Develop, with all relevant stakeholders (regional authorities, business owners, workers, academia and citizens), regional transition strategy for the mobility ecosystems: Industry/MS/Regions | S/M

Topic 9: Affordability

9.1. Affordable mobility

- Develop affordable shared mobility solutions: Industry/MS | S/M
 - Support the further development of mobility as a service: Industry/MS/EU | S/M
 - **Consider reduced VAT on bikes sales, repairs and renting, to promote its uptake**(71): MS | S/M
- (71) VAT rates must be in line with the VAT Directive see Article 98(2) of the VAT Directive and Annex III.
- **Promote long term rental, sharing, second-hand market and leasing for bikes and e-bikes:** Industry/MS | S

Topic 10: Safety and Health

10.1. Health and safety protocols

- Identify and foresee safety gaps in protocols and standards and introduce the necessary adaptations protocols ahead of the use of new technologies (battery repairs and handling, alternative fuels at ports, ...): Industry/Unions/MS/EU | S
 - Reskill workers with the latest health and safety protocols and standards before handling new technologies. Ensure they get accredited, and the accreditation is recognised in every Member State: Social partners/Industry/MS/EU | S
 - Improve occupational health and safety to attract and retain skilled workers in the sector(73): Social partners/Industry/MS | M/L
- (73) For example: workers of the metal industry are exposed to physical as well as psychosocial risks that lead to long term sick-leave and premature retirements
- Ensure the correct implementation of data protection and cybersecurity in the mobility ecosystem: Industry/MS/EU | S
 - Ensure the protection of Vulnerable Road Users – such as cyclists and pedestrians, as well as users of powered two-wheelers – in technological deployment of those vehicles that are not covered by EU type approval framework: Industry/MS/EU | S

Topic 11: Future of the working force

11.1. Skills

- Develop a continuous mapping of skills needs and shortages in the labour force, as well as skills intelligence including within the existing partnerships: Social partners/ Industry/MS | S/M/L
- Ensure the availability of suitable VET [vocational education and training] providers for the mobility ecosystem twin transition: MS | M
- Address the challenges and barriers related with the slow process of change/adaptation of curricula at VET and university level. Support a more agile and labour market oriented approach to educational and training institutions: MS | M/L
- Reinforce coordination between the ongoing initiatives: the Pact for Skills and its different Large-Scale Partnerships (LSP), such as the Automotive Skills Alliance (ASA), the European Battery Alliance Academy (EBAA), the Net Zero Industry Academies, Centers of Vocational Excellence, and other cluster programmes on skills, to maximise their positive impact for the industry: VET providers/Academia/MS/EU | S
- Create a Cycling sectoral skills alliance, aiming to facilitate the transition of jobs into cycling manufacturing: Social partners/Industry/MS/EU | S/M
- Promote the transparency of qualification requirements at European level. Reinforce mutual acceptance of the skills and competences: Social partners/Industry/MS/EU | M
- Develop labour transition plans, especially for workers in the automotive sector to transition towards other adjacent sectors: Social partners/Industry | M
- Raise awareness on how specific training programmes will contribute to personal development. Help identify skills gaps and job upgradability options. Advise on the available resources to build a successful career: Social partners/Industry/MS | S/M
- Promote the creation of stronger ties between the mobility ecosystem and education and training institutions: Industry/MS/EU | M

11.2. Attractiveness

- Initiate communication campaigns to highlight the mobility ecosystem commitment to sustainability and innovation: Social partners/Industry | S/M
- Test different communication strategies and share best practices with the ecosystem: Industry | M
- Improve working conditions, work environment and the quality of work to attract talent to the mobility ecosystem: Industry/Social partners | M
- Promote the image of the sector through campaigns and events to increase its attractiveness in the long term. Develop campaigns especially for youth and women (e.g. social media, events at schools, site visits etc.): Social partners/Industry | S/M

Topic 12: Cross sectoral innovation

12.1. Research and innovation in the mobility ecosystem

- Support the creation and successful implementation of the common European mobility data space: Industry/MS/EU | M
- Promote broader demonstrations with a strong focus on technological readiness, assessing the social acceptance of new technologies and innovations (80): Industry/MS/EU | S

80 Example: the EIT Urban Mobility model is to have short and agile projects (six months to one year) that start from the specific need of a city. EIT Urban Mobility facilitates cooperation for testing and technology adoption by launching an open call for solutions. During six months the city works closely with the technology provider for piloting and demonstration. The focus here is on high Technology Readiness Level (TRL) solutions. Starting from very precise needs the local authority has for technology deployment. Examples from the 12 cities involved in the RAPTOR 2023 call: Den Haag wants to improve the journey to the beach to reduce congestion, Barcelona needs support for their city logistics operations to become more data driven, Munich needs more data to research new mobility patterns in the city and Helsingborg was in need of establishing a bicycle culture. You test what works or not on specific examples before scaling up.

- Ease the conditions to obtain authorizations for experiments in operational environments. Ensure that the public and local governance play their role in terms of adoption of innovative technologies: MS/EU | S
- Develop a Mobility industrial technology roadmap⁸¹ in the context of the European Research Area strategy: Industry/MS/EU | S

- Promote cross-sectoral partnerships between industries that encourage the exchange of experience and expertise, easing the technical and technological transfer from industry to industry (82) (within the mobility ecosystem but also with other ecosystems and industries): Industry | M

82 For example: the bicycle industry suggested the opportunity of learning from the automotive sector expertise on lean manufacturing techniques and mass scaling of the manufacturing process.

Topic 16: Bike innovation

16.1. Research in bike industry

- Develop smart value chains and share best practices emerging from the European mobility and industrial manufacturing data spaces: Industry | S/M

16.2. New techniques and business models

- Further develop bike sharing fleets, bike subscription based or leasing services, refurbishment of bikes: Industry | S/M

Topic 20: Cycling infrastructure

- Develop of safe infrastructure for cycling (including for cargo bikes): MS | S/M

Topic 21: Investment and funding

- Consider potential improvements to the design of public funding schemes for the mobility ecosystem as appropriate: MS/EU | S/M
- Support the development of blending facilities through further cooperation with National Promotional Banks and Institutions (NPBIs): MS/EU | S/M
- Ensure the Innovation Fund can support transport related projects without undermining its existing objectives: EU | S/M
- Create grants for green transition to support SME acquisition of cargo bike for use in business deliveries: MS | M

MTP–Auszüge zur Fahrradwirtschaft

The mobility ecosystem covers the entire value chains of automotive, rail, waterborne and cycling, and includes services.

The EU **cycling** value chain, which includes manufacturing, cycling infrastructure, cycle tourism, cycle hiring, cycle logistics, other services, is responsible for 1.3 million jobs and EUR 21 billion contribution to the EU GDP. In 2022, 20 million bikes were sold of which 5.5 million were Electrically Pedal Assisted Cycle (EPAC)(16). The assembly of bicycles in the EU in 2022 amounted to 15.3 million(17) of which 5.4 million were EPACs(18). EU is also the world leader for bike sharing. The EU cycling supply chain already represents over 1,000 small and medium-sized enterprises (SMEs)(19).

(16) CONEBI/CIE/ECF: EU and UK Market and Industry forecast <http://ebma-brussels.eu/wp-content/uploads/2022/12/CONEBI-Ebikes-and-Bicycles-sales-forecast-%E2%80%93-EU27UK.pptx>

(17) Includes the UK

(18) 2023 CONEBI Bicycle Industry and Market Report (BIMP) <https://www.conebi.eu/industry-market-reports/>

(19) Idem

The bicycle industry is **competitive in the upper-middle and higher-end consumer markets** where there is more emphasis on product quality based on ISO standards, skilled workforce, and innovation. Its competitiveness has also been enhanced by a **strong overall support for cycling mobility by Member States** (e.g. through the European Structural and Investment Funds), with investments in infrastructure and associated fiscal incentives that have strengthened demand for European brands.

The **production of electric bikes (e-bikes) is becoming increasingly a “European business”**. Out of the total of approximately 5.5 million e-bikes sold in 2022, 80% were assembled in the EU with 45–50% of all components manufactured in Europe, while for regular bikes out of the approximately 14.6 million sold in 2022, 65% were assembled in the EU with 30–35% of the components manufactured in Europe(47).

(47) 2023 CONEBI Bicycle Industry and Market Report (BIMP) <https://www.conebi.eu/industry-market-reports/>

Another sign of this leadership is the emergence of a European EPAC (Electrically Pedal Assisted Cycles) standard(48/49). Finally, **Europe leads in developing the wider cycling services** (ridesharing, subscription services, repairing or cyclo-tourism)

(48) EN 15194 - Electrically power assisted cycles - EPAC Bicycles

(49) Singapore makes direct referencing to the European standard in its own laws.

However, according to the stakeholders, challenges arise in the lower to middle market segments where Asian producers benefit from subsidies and important price differences stemming from lower labour costs. **Bikes and e-bikes manufactured in non-EU countries can be from 30% to 70% cheaper**. The cycling industry also anticipates a risk of competition with other larger EU industrial sectors on supply of strategic inputs (e.g. batteries, aluminium, microchips) with consequences on prices.

The use of **EU trade defence instruments** (i.e. anti-dumping, anti-subsidy, and anti-circumvention) on both complete bicycles and complete e-bikes **has helped protect the EU industry**(50) from unfair trade practices and unfair competition. The European bike industry estimates that thanks to trade defence instruments, it has already re-shored 80% of e-bike assembly.

(50) Illustrated by comparisons with the US and Japan bike industry who did not adopt such measures

The stakeholders recalled that complementary demand measures for bicycles across the EU could further reinforce the business case for the production of bicycles in the EU. The Commission has recently proposed a European Declaration on Cycling(51) to encourage the uptake of cycling, signalling a strong support and commitment for this mean of transport.

(51) COM (2023) 566 final

There are increasing synergies and parallel developments in R&D between the bicycle and automotive industries. Therefore, many of the innovation action points outlined above for the automotive industry also apply to the bicycle industry. In addition, the bicycle industry's innovation thrives thanks to the numerous SMEs and benefits from transfers of technological knowledge from other sectors, for example from the automotive industry in relation to automation of assembly lines, electronic, electric or data acquisition, and from the military and aeronautical industries for material composites. The bike industry also largely depends on scarce raw materials and it is essential that the sector increases R&I investments in R&I recycling and recovering parts.

In the last years, there has been an increase in the variety of options and business models in the sector, from **subscription models to ride-sharing schemes or the introduction of public bicycles as part of the public transport infrastructure**. The market has also experienced the popularization of new bike models, induced by the electrification of light vehicles, with a plethora of cargo bike designs and fast electric bikes. This development has helped to solve part of the problems with last mile trips and deliveries and has allowed municipalities to amplify their offer and cover some areas that were underserved by the traditional public transport network.

The digital transition in the bicycle sector will mainly impact the industry on the efficiency of its operations at the production stage with the introduction of **smart value chains or robotization, and the management of ride-sharing fleets**. The product itself is also impacted with some connectivity capabilities and features but the overall complexity of this developments compared to other sectors is minor.

According to stakeholders, many **EU countries have increased their investment in cycling infrastructure in recent years** with dedicated national cycling strategies but there remain significant differences across the EU. However, **lack of safety in cycling infrastructure is still an important issue**, if not the main reason why consumers shy away from buying and using a bicycle. This issue has been tackled at EU level by the **Road Infrastructure Safety Management Directive (RISM)**(97), which establishes guidelines for the quality standards and safety requirements of cycling infrastructure while mapping the existing cycling infrastructure in the Member States and categorizing according to safety levels, and by Chapter V of the EU proposed Cycling declaration on improving road safety and security and related proposed commitments.

(97) Directive (EU) 2019/1936 of the European Parliament and of the Council of 23 October 2019 amending Directive 2008/96/EC on road infrastructure safety management.

The main fields for improvement of the European cycling infrastructure include (i) cycle logistics infrastructure (e.g. micro hubs), (ii) safe bicycle parking solutions such as protected parking at train stations and cycling boxes in urban areas, (iii) charging infrastructure in buildings, at the workplace but also at important community hubs and often frequented places such as supermarket, (iv) Infrastructure to transport bikes by trains.

In the proposal for a recast Energy Performance of Buildings Directive, mandatory bicycle parking spaces in new buildings and buildings undergoing major renovation are introduced in order to remove barriers to cycling as a central element of sustainable, zero-emission mobility, in line with the European Green Deal and the new EU Urban mobility framework.