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# **Delivering Good Work:** A stakeholders' perspective

Charlie Couve, Ersilia Verlinghieri and Tiffany Lam



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**Charlie Couve** is a Research Associate at the University of Westminster's Active Travel Academy. He recently completed an MSc in Transport and City Planning at UCL. He is interested in the equity dimensions of emerging low-carbon transport modes, and has previously worked as a cargo bike rider in London.

**Ersilia Verlinghieri** is a Senior Research Fellow at the Active Travel Academy, University of Westminster and Research Affiliate at the Transport Studies Unit, University of Oxford. Her research sits at the intersection of urban studies and transport geography, with a specific focus on issues around transport and mobility justice. She is currently involved in several projects covering: the governance of low-carbon transition, the assessment of social impacts of transport interventions, pathways to low-car cities.

**Tiffany Lam** is an expert in inclusive active travel, and has worked with cities and organisations across the UK, Europe, US and Latin America to create more equitable and inclusive active travel policies and networks. She also led work around the Green New Deal and Just Transition at the New Economics Foundation, and shaped policy proposals for gender-inclusive sustainable urban transport systems for the UK Feminist Green New Deal. She currently works at Sustrans as the Strategy Lead – Equity, Diversity and Inclusion.



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This report builds on our previous research, 'Delivering Good Work: Labour, employment and wellbeing in London's cargo bike sector', which focused on the experiences of workers in London's cargo bike logistics sector and presented over 45 recommendations to promote riders' wellbeing and better working conditions.

The report highlighted how cargo bike couriers experience precarious work and health and safety risks. The workforce also lacks diversity, but the challenges riders face tend to be overlooked in research, policy, and planning. In response, the report suggested that policymakers and cargo bike firms improve conditions by providing fair employment; expanding cycling infrastructure; improving health and safety; diversifying the workforce; improving management practices to support wellbeing; and working together to scale up the sector.

This follow-up research aimed to further develop and support the implementation of recommendations requiring collaboration between managers and other stakeholders. Specifically, we focused on the barriers faced by managers to progress recommendations, as well as actions and actors required to address these barriers. We sought to broker relationships between key actors to encourage the collaboration needed to implement key recommendations.

To do so, in the spring of 2023, we conducted two follow-up workshops with managers of cargo bike logistics companies and several policy talks with key actors, which culminated in a roundtable in April 2023.

The follow-up research helped to clarify the issues facing managers, including difficulties around recruitment and retention, rising operating costs coupled with the withdrawal of government financial support, as well as widespread doubt around the potential of cargo bikes among prospective clients and other stakeholders.

Despite these challenges, which we highlighted in our initial report, managers took various actions to improve riders' wellbeing. These include union recognition, introduction of minimum- hour 'worker' contracts, and new rider progression pathways, enhanced provision of new equipment, an improved benefits policy, a mental health support service, the appointment of a welfare officer. This demonstrates a collective appetite for change and ambition to improve employment standards in the cargo bike logistics sector.

Three areas were identified as those where coordination and collaborative action could achieve further impact at scale: working standards and road safety; collaboration and consistency across the sector; and support and visibility for the sector. For each area, we developed more detailed recommendations for scaling up the cargo bike logistics sector while improving rider health, wellbeing and fair working conditions.

The recommendations, which are summarised below, are presented in more detail toward the end of this report. They build on, and should be read in conjunction with those already developed in the 'Delivering Good Work' report.

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## 1. Improve working standards and road safety

**Cargo bike companies, workers** and **trade unions** should develop sector-wide working standards that take the wellbeing of riders seriously and amplify riders' voices.

**Transport for London (TfL)**, the **Mayor's Office**, in conjunction with the **Met Police**, should take action to raise awareness of and tackle road aggression.

# 2. Increase collaboration and consistency across the sector

**Cargo bike companies, workers** and **unions** should form an industry alliance to advocate for collective goals, share ideas and concerns, and embed sector-wide working standards. Other stakeholders such as the **Bicycle Association** and **TfL** should support the process.

# 3. Increase support and visibility for the sector.

The Mayor of London and the DfT should increase incentives for the uptake of cargo bikes and disincentives for the use of vans, for example by re-introducing the eCargo Bike Grant Fund. The London Assembly should support this change.

**Local authorities** should work with cargo bike companies to support their uptake for local deliveries, for example, securing land, incorporating cargo bikes in their fleets. As local authorities can support inclusive local economic development through progressive procurement practices, they should prioritise companies that are able to guarantee high standard working conditions.

Cargo bike companies, research and policy institutes, third sector organisations and local and national policy makers should continue to promote cargo bikes for urban delivery by developing campaigns and supporting the widespread adoption of the Cargo Bike Charter.

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Further to these recommendations, we believe that the following principles should inform planning and policy decisions to enable a just transition to low carbon urban mobility systems:

- Put the experiences of riders at the heart of any cargo bike strategy
- Prioritise the voices of smaller and less well-represented operators
- Communicate effectively and widely the multiple benefits of cargo bikes adoption for the local and national economy, the environment and public health and public space.

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## 1. Introduction

This report summarises a piece of work following from previous research, 'Delivering Good Work: Labour, employment and wellbeing in London's cargo bike sector', which focused on the experiences of workers in London's cargo bike logistics sector.<sup>1</sup> Between June and December 2022, we did a combination of interviews and focus groups with 15 riders and 15 managers from over 15 cargo bike logistics operators in London. We focused on smaller, independent operators, rather than larger operators, which were difficult to engage with.

Our interviews and focus groups enabled us to shine a light on the often overlooked 'on the ground' experiences of workers, particularly riders, in the sector. Based on these interviews and focus groups, we developed 45 recommendations to promote riders' wellbeing and working standards, whilst supporting businesses to develop commercially and operationally. These recommendations were structured around five themes:

- Health and safety
- Good/fair work
- Equity, diversity and inclusion
- Technology, organisation and management
- Scaling-up.

Our follow-up research took place between January and June 2023. Our aim was to maintain momentum from the previous project and work more closely with managers to identify which recommendations in our initial report resonated the most and support their implementation. We had five key objectives:

- Understand actions already taken by managers
- Identify actions managers would like to take and any barriers they face
- Identify additional actions and actors required to address these barriers
- Broker relationships between key actors to encourage necessary collaboration and exchange
- Identify external workstreams for support and/or collaboration.

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To achieve these objectives, we ran two follow-up workshops with managers, including some who were involved in our initial project. We also held policy talks with key actors to share our research and get buyin for future participation. The project culminated in a policy roundtable in April 2023, where we discussed our priority recommendations with managers and other stakeholders.

This report summarises key findings from our initial project before outlining the work undertaken during this follow-up project and discussing the actions already in train, those that should be prioritised, and the actors required to drive these forwards. It offers some reflections on the direction of the sector and the research process and concludes with key lessons.



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# 2. Key findings from our initial project

Our initial research found that riders had mixed experiences of work. Overall, there was a shared commitment to sustainability and a shared motivation to cycle for work, be outdoors and get paid to exercise. Riders enjoyed the flexibility of income and hours, although some expressed discontent at the precarity associated with an obligation to be flexible when there was no alternative to working on a self-employed basis. Similarly, riders felt the pay was not commensurate with the physical and often gruelling nature of the work. Riders' confidence in navigation, loading, riding and general safety varied greatly, due to the inconsistency of training they received.

Consistent with the wider logistics sector, gender was a key determinant of riders' experiences both on the road and in the workplace. Female and non-binary riders spoke more about aggressions and gender-based harassment from other road users, as well as challenges associated with working in a male-dominated sector, such as a macho work environment and culture.

During our initial research, it became evident that managers play a crucial role in ensuring that riders' wellbeing is put at the centre of operators' practices. They wear many hats, as they are the point of contact for riders, run the operations, and are often responsible for business development.

Managers also face several challenges to securing long-term growth and sustainability of the business in what is generally regarded as a lowmargin industry. Emerging local operators in the cargo bike logistics sector face wider structural pressures, notably a lack of funding and intense competition with van logistics operators who drive down costs through exploitative employment practices.<sup>2</sup> While managers generally endeavour to provide good and fair work to their staff, riders often absorb business uncertainty and instability, particularly in newer and smaller companies.

When discussing the various challenges faced by managers, many of them felt that improving the sector would require structural change through policy interventions beyond their capacity and remit, including around funding, accreditation, regulation, and the emergence of a trade body. Additionally, the managers who attended focus groups spoke positively of the opportunity to exchange information and knowledge.

As such, our follow-up research provided a crucial opportunity for managers to continue to share knowledge and collectively brainstorm how to support riders as well as the sector's growth.

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# 3. Managers' views on the future of the industry and its challenges

A step-change can be observed in cargo bike logistics in London. In the 11 months since the start of this research, there has been a significant uptick in the number of cargo bike operators, the number of logistics operators integrating cargo bikes into their fleet, and the diversity of sectors using cargo bike logistics. As evidenced in TfL's Cargo Bike Action Plan, cargo bike logistics are becoming increasingly less niche as they are integrated into standard tools of traffic measurement and growth area opportunity projections.<sup>3</sup>

As highlighted in our previous report, scaling up is a common objectives for managers seeking to maximise the environmental impact of their services, introduce new opportunities and improve conditions for riders by reaching a critical threshold for business security and sustainability.

However, there were several recurring challenges faced by managers when trying to scale and achieve greater security, whilst also ensuring fair and good working conditions:

- **Personnel** managers reported struggling with recruitment and particularly retention. Riding a cargo bike is a highly skilled job, requiring the ability to navigate busy roads, dealing with customers, and also dealing with often unfavourable weather conditions. This, coupled with a general mix of lack of clarity on progression, as well as precarious and low-paid working conditions contributed to a transient workforce
- **Diversity** although managers recognise it as quite a maledominated sector, few knew how to change this
- Rising costs inflating electricity and rent costs were another challenge for managers, increasing their overheads in an already highly price-competitive sector
- Withdrawal of support the eCargo Bike Grant Fund ran from 2019-2022, but no replacement subsidy has been introduced
- Cultural resistance to change the lack of belief in the potential of cargo bikes due to a perceived illegitimacy from prospective clients

The challenges identified in the first stage of our research are multifaceted and often overlapping, and several were recurring issues in the follow-up workshops.

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Following the publication of the report, managers took various actions to improve riders' working conditions and wellbeing. These include enhanced provision of new equipment, an improved benefits policy, and a mental health support service. Some described more managerial change, such as the appointment of a welfare officer, introduction of minimumhour 'worker' contracts, and new rider progression pathways.

In March 2023, Pedal Me agreed to recognise the Independent Workers of Great Britain (IWGB) as the riders' union, demonstrating a precedent for collective bargaining in the cargo bike logistics sector. The actions taken demonstrate an appetite for change, and an ambition to raise employment standards in the sector.

In the follow-up workshops we focused on three areas where coordinated and collaborative action could achieve impact at scale:

- Working standards and road safety
- Collaboration and consistency across the sector
- Wider support and visibility for the sector.

The overall takeaway from these workshops was that the sector needed to be rendered more visible and legitimate, and that formalising mechanisms such as funding and qualifications would play an important role in this.

#### Working standards and road safety

Managers were asked to comment on the following recommendation from our Delivering Good Work report:

Cargo bike companies should centre their practices on riders' wellbeing, ensuring that riders have well paid and secure work and fundamental employment rights, such as sick pay and access to union representation. In addition to this, take action to advance equity, diversity and inclusion at all levels.

We suggested that one way for companies to work towards this is through starting working towards achieving higher levels of the Mayor of London's 'Good Work Standard'. Managers seemed interested in this but had not heard of it prior to the workshop, indicating a need for better communication between the Greater London Authority and the cargo bike logistics sector.

A similar discussion revolved around riders' experience of road safety, particularly in terms of aggressive driving, with van drivers identified as the main culprits. Incident reporting is mostly an internal process with varying degrees of formality, and near misses and close passes are recorded in various ways, ranging from anecdotal discussions, Google Forms and WhatsApp reporting to installation of body cameras and bike cameras.

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Managers highlighted a key tension between the often unsatisfactory responses from the police following incident reporting, and the role that concerns around road danger play in staff churn and retention. While many recognised the importance of extensive and high-quality training in improving a rider's actual and perceived road safety, the discussion also identified the need for a more serious police response to incidents, including close passes and driver aggressions. At Pedal Me, incident reporting and training are entwined, with near miss details including rider name and location recorded to identify hotspots or road layouts to focus re-training interventions. Section 4 includes additional conversations we had with policy actors around road safety.

#### Collaboration and consistency across the sector

Managers were asked to comment on the following recommendation part of our Delivering Good Work report:

Cargo bike companies and policymakers should promote greater collaboration across the sector through the development of an industry alliance that includes cargo bike companies as well as policymakers. The alliance should prioritise a consistent approach to rider training and health and safety, including taking immediate action to tackle street harassment.

In response to the proposal, managers emphasised the benefits that knowledge sharing and learning between companies and policymakers would bring and agreed that this should be formalised in an industry body or alliance. For instance, several managers were not aware of the forthcoming Cargo Bike Summit which was an important milestone in the public communication activities of the sector. Managers mostly agreed that it would be useful to have a toolkit that offered information, case studies, and specific tools for managers, for example around subsidy availability, insurance, training practices, and information on events and speaking opportunities.

A unified body or voice would also benefit the external communications and engagement of the sector, helping to improve its visibility and legitimacy. For example, an industry alliance could collate information on CO2 emissions savings and offer a powerful public narrative about the sector. Given managers' recognition of the need for wider policy changes to support the growth of cargo bike logistics, an industry alliance could be a valuable space for managers to discuss policy asks and recommendations.

The main concern around greater collaboration or the formation of an alliance was the time and resource limitations faced by managers, particularly when benefits were unlikely to be immediately tangible. However, managers expressed an interest in contributing financially if another organisation would take this on.

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#### Wider support and visibility for the sector

Managers were asked to comment on the following recommendation part of our Delivering Good Work report:

Local and national government should develop mechanisms to nurture and support the cargo bike logistics sector. This should consider fiscal and other types of support, for instance helping to identify low-cost or underutilised land for new depots. It should also include actions by public sector actors to increase acceptability of the sector, and consider better promoting the vocational aspects of work in the sector.

Vocational qualifications exist for the wider logistics sector, including logistics operations management, and goods vehicle driving. Managers felt that legitimising the cargo bike logistics sector would require similar approaches as can be observed in other areas of logistics. In particular, managers believed that demonstrating more roles beyond 'just' working as a rider could also help to improve staff retention. However, a key point of contention was around cost and time, with managers running low margins and concerned about sinking costs in riders who may soon quit.

The HGV sector can offer an interesting precedent. High demand for haulage drivers prompted the Department for Education to fund training for 4,000 lorry drivers through skills bootcamps, apprenticeships, vocational qualifications, and driving schools, enabling multiple pathways into the role.<sup>4</sup> Similarly, managers linked the need for government support at a vocational level to their positive use of the COVID-19 Kickstart fund, where the salary subsidies were used to pay for riders' mechanical training courses.

Managers also broadly supported the introduction of 'black and white regulations' to legitimise the sector. However key concerns were voiced around the form this would take, and the level of input managers would be able to give to ensure their needs and ideas were incorporated. The increasing variety of cargo bike models showcases the creative approaches being taken to low carbon logistics, however clarity around vehicle standards and classification is important to ensure that companies do not sink investment into vehicles that will soon become regulatorily obsolete.

Another key element of supporting the sector is ensuring the correct information is communicated to audiences whose adoption of cargo bike deliveries will create the most significant change. Encouraging such a cultural shift is a key element of any transition to a new technology. The need for better means of communication with wider industries who rely heavily on the movement of goods was a key topic throughout the workshops. Support from local and city government actors will be crucial to promote cargo bike logistics and increase uptake in new sectors.

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## 4. The role of other actors

The literature on sustainability transitions establishes the importance of actors outside of those immediately involved in the innovation, in this case the cargo bike logistics sector. These actors act as a conduit between this 'niche' and the wider space, which in this case is logistics and freight.

Following the initial workshops, we identified actors (e.g.cross-party London Assembly members, TfL representatives, London Travel Watch) who would play an important role in taking action in certain key areas. Through a combination of 1-to-1 policy talks and a stakeholder roundtable, we discussed with them their views and options for supporting the sector.

#### Working standards and road safety

Developing standards around employment has been a central recommendation of this project, to ensure that as the cycle logistics sector grows, it does not mirror the poor employment practices that characterise the wider logistics sector.

Our research has been supported by a recent report from the London Assembly Economy Committee that outlines some key actions for the Mayor to take to ensure good growth in the cargo bike logistics sector.<sup>5</sup> One of these recommendations advocates that the Mayor should lobby the central government to strengthen employment rights for delivery workers.

One example of stakeholders acting to improve employment practices is in the recent recognition of the IWGB union by Pedal Me. Union recognition has enabled riders' greater involvement in decision making. This offers a case study of how union representation does not threaten business interests, but can instead promote rider wellbeing and support the development of a reliable and highly skilled workforce.<sup>6</sup>

The Bicycle Association (BA) is the trade body for the UK cycling industry, and recently merged with the UK Cycle Logistics Federation. Their work in 2023 includes developing an operator code of conduct that operators can sign up to in order to demonstrate a level of professionalism. As this is being developed, we are engaging with the BA to ensure this code of conduct includes standards around the type of employment being offered to riders.

The BA is also developing a sectoral training standard aiming to ensure a baseline level of training across all riders in the sector. This will begin as a voluntary standard, with a view to seek government endorsement in the future. If successful, this would help to ensure sectoral professionalism across the UK. European cargo bike vehicle standards are nearing finalisation, and the BA's existing links to the EU Cycle Logistics Federation means that any UK standards are likely to complement and reflect those in Europe.

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However, it is important to get buy-in from the central government. From our own experience, and through speaking to others, achieving buyin or engagement with central government around cargo bike logistics is difficult due to the complexities involved in inter-departmental coordination. However, this is crucial to help scale-up the work around standards and regulation across the UK.

At the London scale some key policy actors supported the imperative to improve riders' safety. London Assembly Member Elly Baker suggested learning from other sectors such as the rail industry where there are strong standards around safety and proposed a road safety inquiry to explore unique gendered and racialised dimensions of road safety. This was supported by London Travel Watch who noted that the differential experience of risks on London's roads warranted further investigation.

Similarly, it is positive to see that safety is a key pillar of TfL's Cargo Bike Action Plan. This emphasises the need for more safety standards and regulations around cargo bikes, as well as the importance for extensive rider training, which operators should be responsible for providing. The Action Plan also notes that female riders are more likely to experience harassment. Joining this up with the interest from the London Assembly member could offer a substantial move towards taking seriously differential cycling experiences at a policy level.

#### Collaboration and consistency across the sector

Joining up activities was described by all policy actors as a necessary step in strengthening the sector. In some cases, our respondents were not aware of others' relevant workstreams, and noted the value in greater collaboration across the sector. As an industry body, and following the merger with the UKCLF, the BA essentially already operates as a coordinator of such an alliance, with a large and diverse membership of relevant actors, and an objective of professionalising the cargo bike logistics sector. The BA responded positively and noted that they could lead coordinating an alliance, but the lack of financial resources was a potential barrier.

Our roundtable was a useful opportunity to identify common ground between the BA and other organisations; for instance, emerging actors such as Glimpse could complement the BA's technical expertise in the area with support in external public communications and promotion. Glimpse indicated they could offer specialist support in forming and promoting the industry alliance, and similarly MP Smarter Travel could further support through their extensive network of relationships in the sector.

Support from key policy actors will be crucial in ensuring the interest in forming an alliance is taken forward and implemented. TfL expressed support for the alliance and the need to establish shared objectives from an early stage, but were reluctant to commit beyond staying in contact with the Bicycle Association. There is a TfL cargo bike working group that takes place every 6 weeks, which offers a potential opportunity for promoting the alliance and integrating activities.

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#### Wider support and visibility for the sector

Support from policy actors has been emphasised in this report, and these can be further strengthened and formalised through specific policy mechanisms within both local government and central government.

As demonstrated in the 'Bikes for Business' project, growth in cargo bike logistics is largely driven by businesses and the private sector. Key actors, such as MP Smarter Travel and Cross River Partnership, play an important role in bridging the gap between businesses and operators. Similarly, Glimpse are promoting the 'Cargo Revolution' through a communication and marketing campaign.

One element of this is the development of a Cargo Revolution Borough Charter, which local councils can commit to by identifying 5 themes for actions they will take<sup>7</sup>. This is a good step, but as discussed with many stakeholders, more action from local government is urgently required to nurture cargo bike logistics and set a precedent for other businesses and organisations in their borough. Two important steps that local authorities should be taking include:

- Incorporating cargo bike logistics into local plans, procurement processes, the council's fleet
- General promotion of cargo bikes.

In London there are some important policies and planning processes into which cargo bike logistics can be incorporated. A stakeholder from TfL emphasised some of these levers, for example incorporating cargo bike logistics into relevant aspects of a future London Plan, which sets the city's development framework. A policy around cargo bike parking or courier hubs could be driven by this.

The London Assembly Economy Committee's report identifies actions needed to promote cargo bike uptake, which includes providing local authorities with cargo-bike specific funding for training to local businesses and support integrating cargo bikes into their operations. The committee's report also advocates for reintroduction of the E-cargo Bike Grant Fund, as well as strengthening the position of cargo bikes within the ULEZ scrappage scheme.

Many of the mechanisms described here are incentives for using and scaling cargo bike logistics. In our workshops with managers, several of them identified the intense competition their cargo bike operations have with van logistics where prices are lower but environmental and social impacts are detrimental.

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A key aspect of nurturing the cargo bike logistics sector is to disincentivise van usage for urban deliveries. Whilst steps have been taken with the expansion of the ULEZ, London pales in comparison to other cities that are taking drastic measures to reduce van movements. For instance, in Barcelona an 'Amazon Tax' is being introduced - this is essentially a financial levy on large retailers that use public space to deliver products purchased online.<sup>8</sup>



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## 5. Final recommendations

Our research shows that several stakeholders are taking action to improve working conditions in the cargo bike logistics sector in London and elsewhere. The crucial next step is to join up these activities and consolidate efforts to deliver impact at scale.

Based on our follow-up work discussed in this report, we propose the following recommendations and indicate which stakeholders are well placed to lead. The recommendations build on, and should be read in conjunction with, those already developed in the 'Delivering Good Work' report.

# Improve working standards and road safety

The wider logistics sector, of which the cargo bike industry is a part, is often precarious and poorly paid, with variable working standards. Working conditions are exacerbated by road danger, with riders facing recurrent aggression and danger on the roads.

**Recommendation for joint action:** Cargo bike companies, workers and trade unions should develop sector-wide working standards that take the wellbeing of riders seriously and amplify riders' voices.

- Existing actions: The **Bicycle Association** is developing employment and training standards, and codes of conduct, , but requires support and endorsement from TfL
- Other relevant actors: TfL, operators, a future industry alliance, research institutes, funders and consultants

<u>Recommendation for joint action</u>: TfL, the Mayor's Office, in conjunction with the Met Police, should take action to raise awareness of and tackle road aggression.

 Other relevant actors: Operators, London Assembly, Greater London Authority

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# Increase collaboration and consistency across the sector

Managers face challenges in improving working conditions as many changes require policy interventions beyond their capacity and remit, including around funding, accreditation, regulation, and the emergence of a trade body. Additionally, they have limited opportunities to exchange information and knowledge.

<u>Recommendation for joint action</u>: Cargo bike companies, workers and unions should form an industry alliance to advocate for collective goals, share ideas and concerns, and embed sector-wide working standards.

- Existing actions: The Bicycle Association will need support, but is being recognised as central coordinating and driving actor
- Other relevant actors: Operators, research institutes, NGOs, policymakers, funders and consultants, all in dialogue and collaboration with riders and their unions

## Increase support and visibility for the sector

Emerging local operators in the cargo bike logistics sector face a lack of funding and intense competition with van logistics operators who drive down costs through exploitative employment practices. They also suffer from limited of acceptance amongst industries who rely heavily on the movement of goods.

**Recommendation for supportive action:** The Mayor of London and the DfT should increase incentives for the uptake of cargo bikes and disincentives for the use of vans, for example by re-introducing the eCargo Bike Grant Fund.

Existing actions: Clear recommendations on how this can be taken forward are included in the report Delivering Good Work by Just Economics. $^9$ 

Other relevant actors: The London Assembly and third sector organisations should:

- 1. Lobby the Mayor and DfT
- 2. Develop an evidence base once standards are introduced to take to DfT
- **3.** Enable learning from positive case studies, e.g. Barcelona 'Amazon Tax'

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**Recommendation for joint action:** Local authorities should work with cargo bike companies to support their uptake for local deliveries, for example, securing land, incorporating cargo bikes in their fleets. As local authorities can support inclusive local economic development through progressive procurement practices, they should prioritise companies that are able to guarantee high standard working conditions.

- Existing actions: Cargo Revolution's Borough Charter<sup>10</sup>; Bicycle Association's operator standard, which must include employment conditions.
- Other relevant actors: Local Authorities, London Assembly, TfL, all in dialogue and collaboration with riders and their unions

<u>Recommendation for joint action</u>: Cargo bike companies, research and policy institutes, third sector organisations and local and national policy makers should continue to promote cargo bikes for urban delivery by developing campaigns and supporting the widespread adoption of the Cargo Bike Charter.

- Existing actions: Cargo Revolution's Borough Charter and Bikes for Business project
- Other relevant actors: TfL, operators, Local Authorities, a future industry alliance, research institutes, funders and consultants.

In addition to these key recommendations for moving the sector forward, we believe that certain broader principles should inform funding, planning and policy decisions. These principles are fundamental for cities hoping to develop an effective cargo bike strategy that contributes to a just transition to low carbon mobility:

- The voices, needs and experiences of riders should be at the heart of any cargo bike strategy, from early ideation through to implementation and evaluation. Only by bringing union representatives and riders more widely into the discussion can the sector grow and at the same time become an exemplar of good employment practices in logistics, outside the dominant logic of precarious and exploitative working conditions.
- Prioritise the voices of smaller and less well-represented operators, who are likely to struggle to survive in a highly competitive market, but who are also the real pioneers in making the sector visible and accepted in cities.
- Communicate effectively and widely the multiple benefits of the introduction of cargo bikes for the local and national economy, the environment and public health and public space. Strengthen this communication with incentives, using all available policy and taxation options so that companies and customers can be charged for the true social, health and environmental costs of their transport and logistics choices. This is necessary to make cargo bikes the first and most obvious option for urban logistics.

Acknowledgments

**Executive Summary** 

1. Introduction

2. <u>Key findings from</u> our initial project

3. Managers' views on the future of the industry and its challenges

4. The role of other actors

5. Final recommendations

References

### References

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