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11:15 ZERO CARBON MOBILITY: CYCLING LEADING THE MOBILITY TRANSITION

CIE 2024 SUMMIT

2 OCTOBER 2024, THE SQUARE, BRUSSELS



**MEREDITH
GLASER**

PROF. CYCLING UGENT,
CEO OF THE URBAN
CYCLING INSTITUTE



**LÍDIA
PEREIRA**

MEMBER OF THE EUROPEAN
PARLIAMENT



**FILIP
BOELAERT**

SECRETARY GENERAL FOR
DEPARTMENT OF MOBILITY
AND PUBLIC WORKS,
FLEMISH GOVERNMENT



**MAXIM
ROMAIN**

COO AND FOUNDER,
TIER-DOTT



**MIKKO
AMPUJA**

FOUNDER AND CHIEF
BUSINESS DEVELOPMENT
OFFICER, VAPAUS



**HERMAN VAN
BEVEREN**

HEAD PRODUCT
DEVELOPMENT
URBAN BIKING,
DECATHLON

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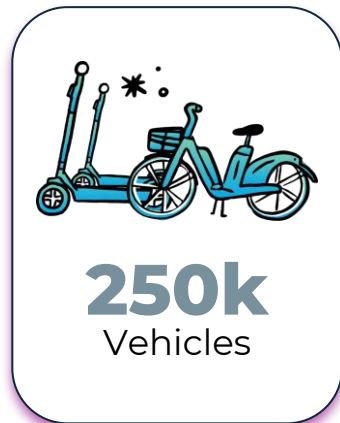
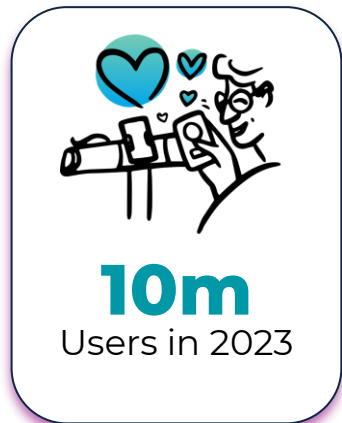
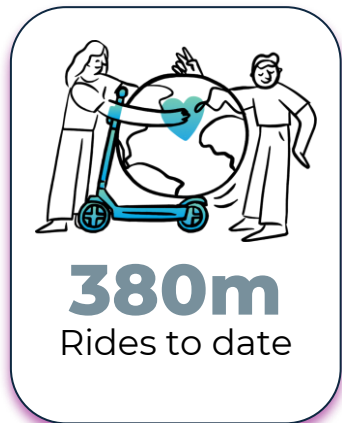
Cycling
Industries
Europe



SECRETARIAAT-GENERAAL
SECRETARIAT GÉNÉRAL

Meet TIER-Dott - The European champion in shared micro-mobility

- **Founded in 2018** with strong European roots
- **Operating shared e-bikes and e-scooters** across Europe & the Middle East
- **Directly employing** over 1900 people, generating 220m € revenues with green jobs
- **United by a vision** of pollution-free cities designed for people, not cars



Our Mission:

**Change mobility
for good, *together***



Share with the permission of TIER-Dott

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VAPAUS BENEFIT BIKES

THE SERVICE THAT 96% OF EMPLOYEES RECOMMEND

WHAT MAKES BIKES IMPACTFUL?



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MAKE
A GOOD
MOVE.



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CIE SUMMIT BRUSSELS

Oct 2024



Herman Van Beveren

Leader urban mobility

DECATHLON

GLOBAL SPORTS COMPANY

Move PEOPLE through the WONDERS of SPORTS



Freedom of
moving
without a car



50 % < 5 km

65-70 % < 10 km



No Sweat

uphill

headwind

warm climate



25 - 50 KG



Health

Social contact

Wallet

On time

Planet respect

Happy and free



Everyone ? ? ?



Uniform product compliance in at least Europe
**Adapted environment for sustainable
mobility**

14:00 INDUSTRIAL ROADMAP FOR CYCLING - WINNING STRATEGIES FOR GROWTH AND INNOVATION

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**JAN-WILLEM
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CEO, VAN RAAM



**RENÉ
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FOUNDING PARTNER, FUNDRACER BY
INVESTOR



**CHRISTIAN
KRUG**

POLITICAL ADVISOR,
JOBRAD

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Cycling
Industries
Europe





Promoting a competitive and sustainable European cycling industry

Call open: 14 August
Deadline: 15 October at 17.00h

*Helping to bring **innovative** solutions to market*

- the professionalisation and digitalisation of the (e-)bike ecosystem
- the internationalisation of successful service solutions
- a more resilient European bicycle supply chain
- the creation of new synergies among industry stakeholders

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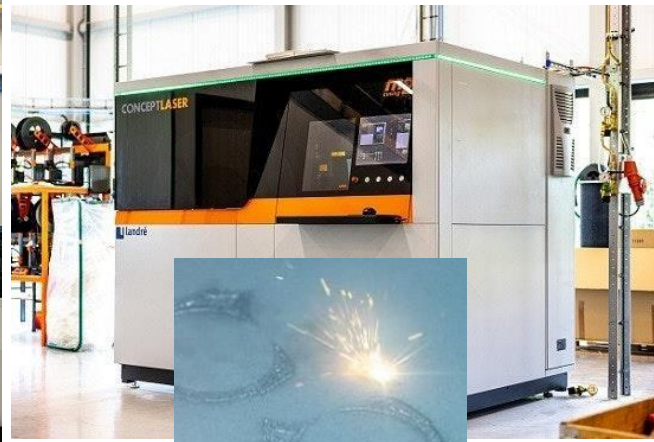
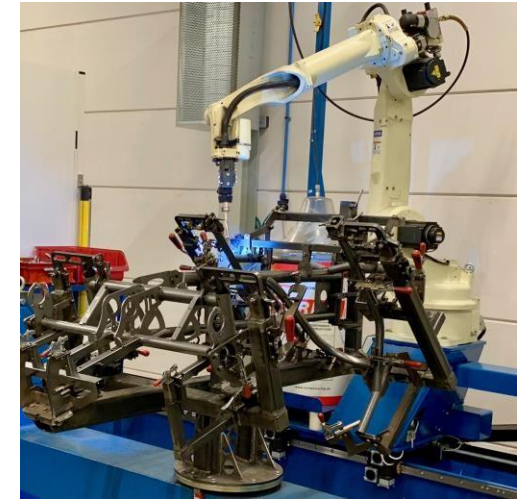
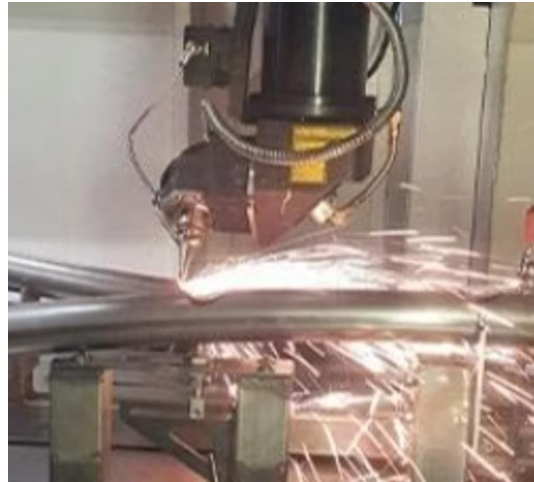
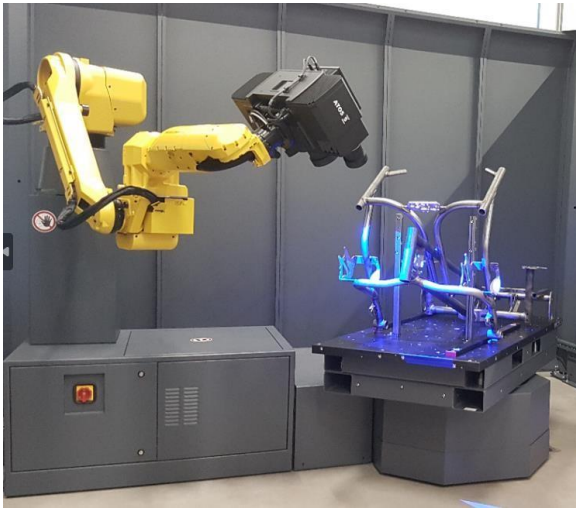
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Cycling
Industries
Europe



Highly automated production in The Netherlands/Europe



Shared with the permission of Van Raam

Royalties on Van Raam bikes. Not possible in the future?



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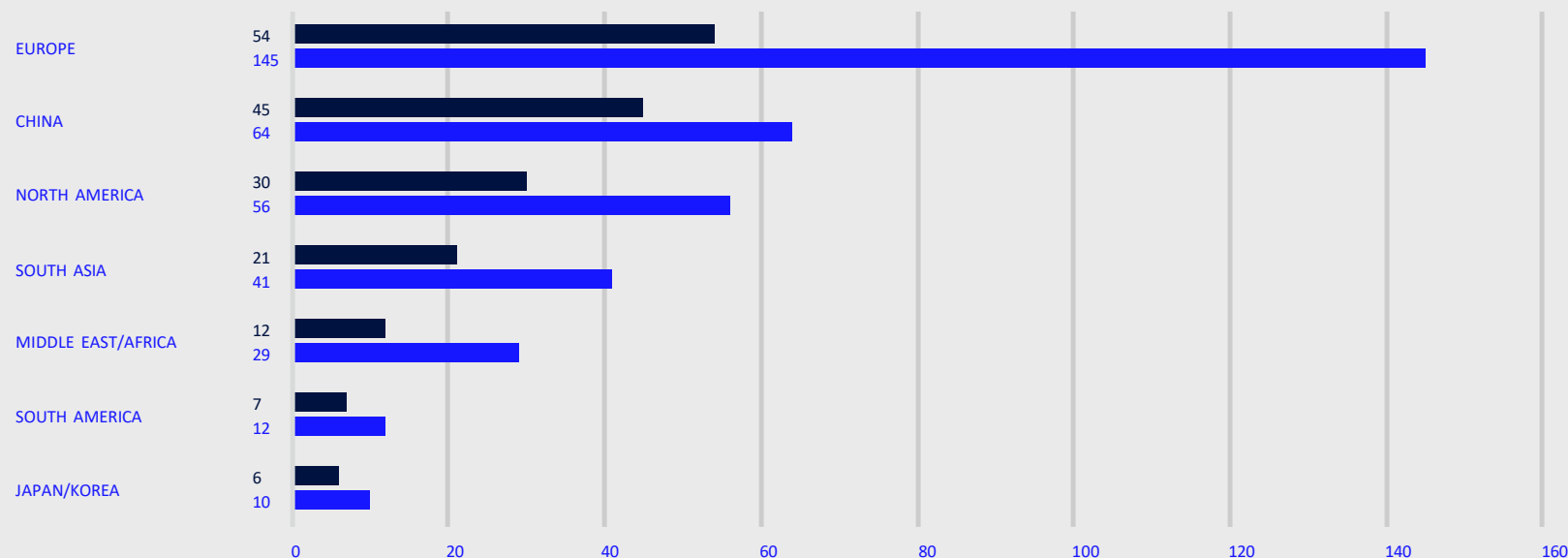


Fundracer

1st dedicated VC fund for micro mobility
start and scale ups

Global micro-mobility market to go 3x by 2035 led by e-bikes and Europe

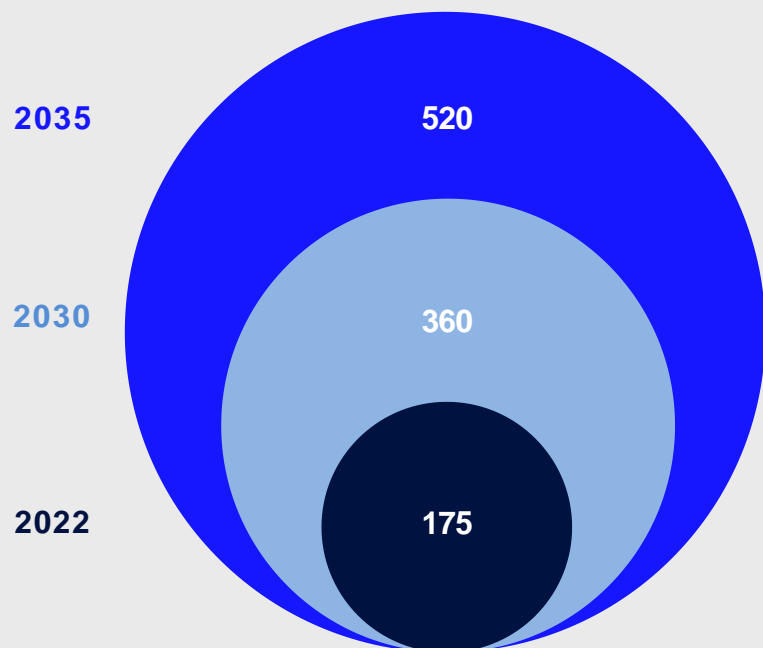
Global value pool split by region 2022 vs 2030 / billion USD



Source:
 McKinsey Center for Future
 Mobility March/June 2024

Global micro-mobility market worth \$ 175 billion in 2021. Revenue is expected to grow by 9% p.a. to \$ 360 bn in 2030, and then further to \$ 520 bn by 2035.

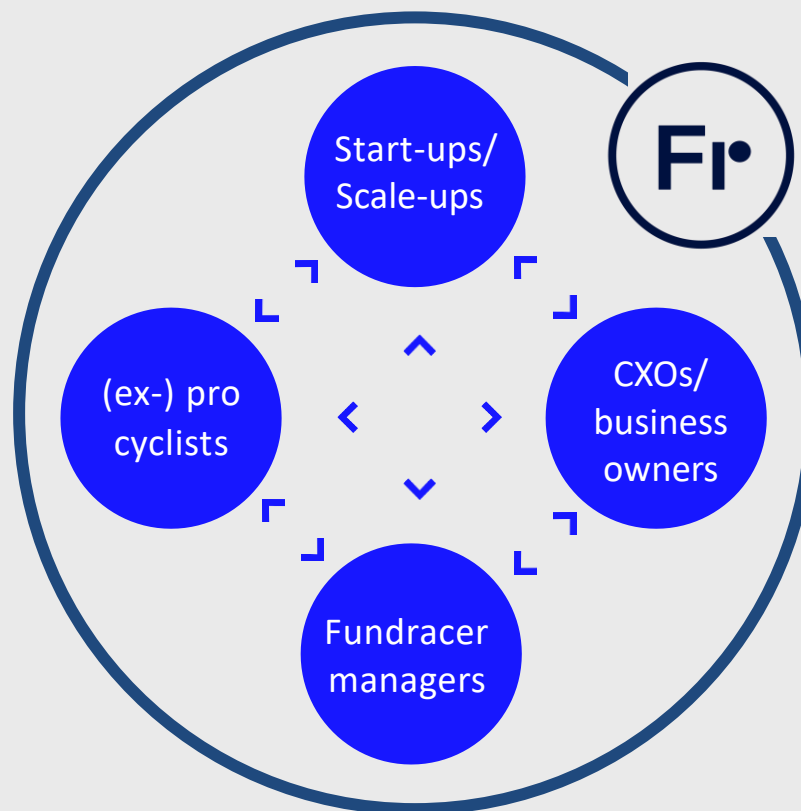
Key regions today are China (\$ 45 bn), North America (\$ 30 bn) and Europe (\$ 54 bn). Europe sees largest increase to reach \$ 145 bn by 2030, North America to reach \$ 56 bn.



Focus segments in mobility

	<i>Focus Segment</i>	<i>Why</i>	<i>Examples</i>
micro-mobility	Safety	Accidents with cyclists are on the rise due to the increased popularity of cycling as a sport and a mode of transportation. There is an increased awareness for safety among cyclist and commuters.	ABS tech for bikes, CV2X tech solutions, helmets, airbags, AI video tech
	Zero-emission	The number of large cities is growing, the size of cars is growing too. There is a need for a radical change in the way people and deliveries move around in cities and commute from suburbs into the city.	Foldable e-bikes, speed-pedelecs, scooters, AI powered last mile delivery
	Performance	Cycling as a sport continues to grow with road, gravel and mountain biking appealing to an ever-broader audience thanks to society's health focus and appetite for manageable adventure". Equipment plays a large role in the excitement.	Customizable equipment, aero equipment, training aides

The Fundracer eco-system



1

Fundracer is more than a fund, it is an eco-system connecting disruptive start-ups/scale-ups, industry professionals and investors with a business/management/pro cycling background and a passion for micro-mobility.

2

The eco-system supports the start-ups to achieve their full potential, making your investments more satisfying and providing the best possible chance of success.

3

Investors can be passive or active partners. Through Fundracer meet-ups and 1-on-1 founder coaching, you can volunteer to support start-ups that need your expertise.

4

If our pro-rata investment rights exceed Fundracer's desired commitment, the remaining rights may be opened up to our investors.

Fundracer

15:00 TOWARDS AN INDUSTRIAL STRATEGY FOR THE BENELUX CYCLING ECOSYSTEM

CIE 2024 SUMMIT
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**CHRISTOPHE
IMPENS**

MANAGING DIRECTOR, GOLAZO SPORTS

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Industries
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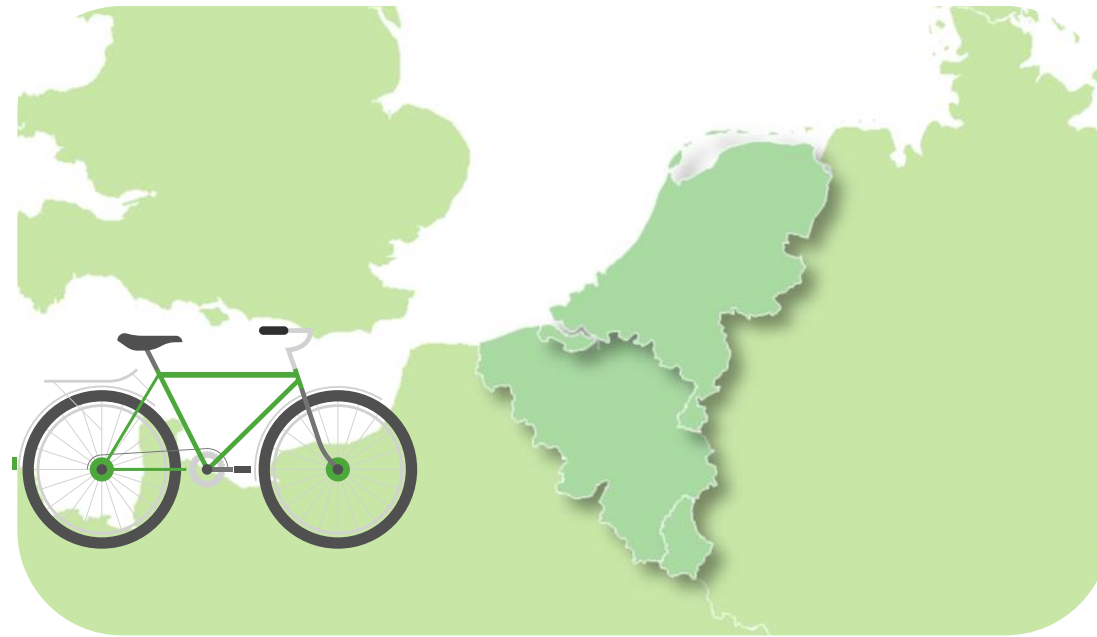
SECRETARIAT GÉNÉRAL
SECRETARIAT GÉNÉRAL



THE BENELUX UNION

***A CYCLING
LIVING LAB FOR
MOBILITY AND
INDUSTRY***

Towards an industrial strategy for cycling...



The Benelux has the bikes, the brains and the motivation!

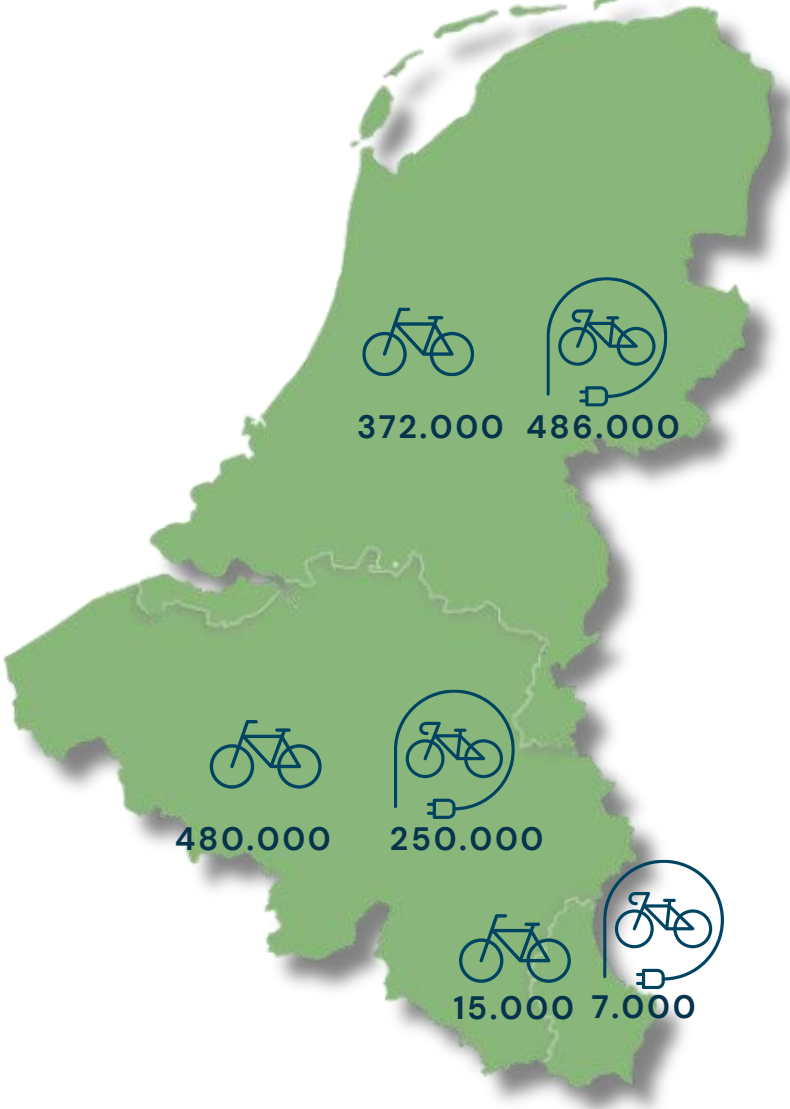
Biggest industrial region in Europe...



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...that is currently working out an **Industrial Clean Deal**

Sales of new bikes and e-bikes



sales of new bikes, incl. e-bikes
9 % of the EU

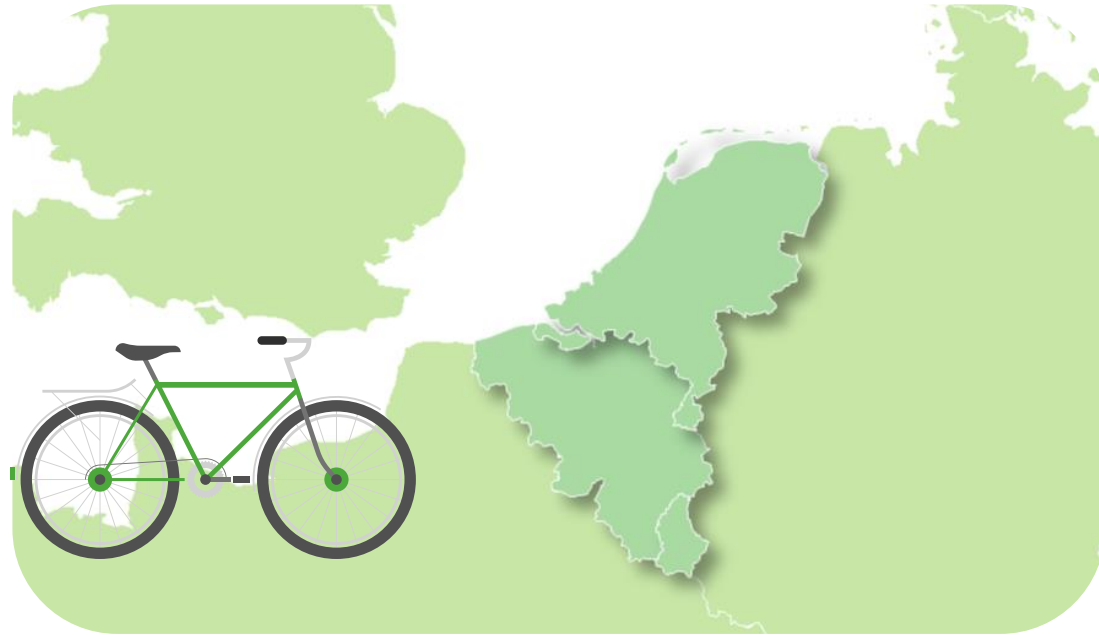
sales of e-
bikes
14 % of the EU EU

What cycling can learn from logistics...



Shared with the permission of the Benelux Union

Invitation to work on a Benelux industrial strategy for cycling....



YOU have got the bikes, the brains and the motivation!

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Cycling
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The cycling economy

The economic rationale for the cycling industry in the Benelux

Shared with the permission of Transport and
mobility Leuven

The cycling economy in Belgium

- Economic value creation

Net Value Added (NVA) = the value of output less the values of intermediate consumption and consumption of fixed capital

Full time equivalent (FTE)

- The cycling economy in a broad sense

Development and production
Sale of bicycles and spare parts
Bike leasing
Shared bikes
Cycle tourism
Cycle logistics
Cycling infrastructure
Tools, accessories and apps
Cycling insurance
Cycling clubs and events
Second-hand market



Key findings

Net value added

Most added value:

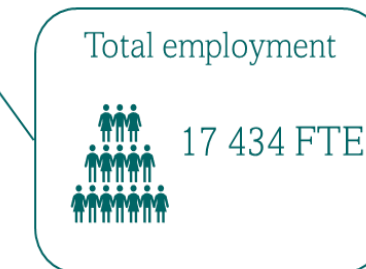
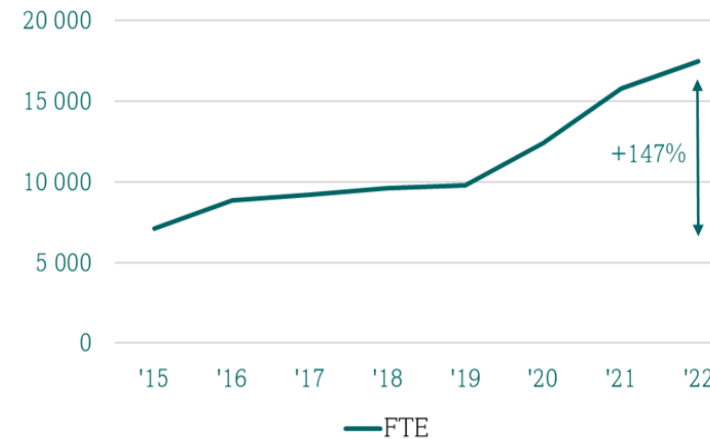
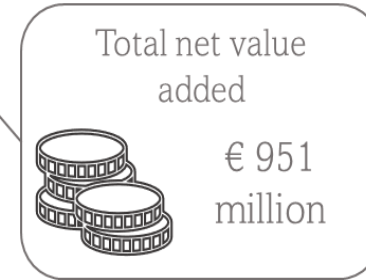
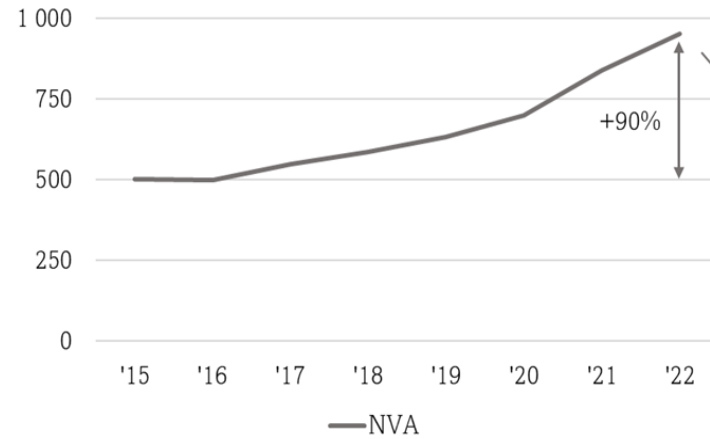
- Bicycle tourism
- Cycle infrastructure
- Bicycle sales

Employment

Highest employment:

- Cycle logistics
- Cycle tourism
- Bicycle sales

The cycling economy grows two times faster than the rest of the economy



Drivers for growth



Bike leasing

Every 1 000 lease bikes
generate € 2.8 million value
added and 27 FTE



Bike sharing

Every 1 000 shared bikes
generate € 2.9 million value
added and 29 FTE



Cycle logistics

25% of urban deliveries by
bike create € 231 million
value added and 8 992 FTE

Shared with the permission of Transport and
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