



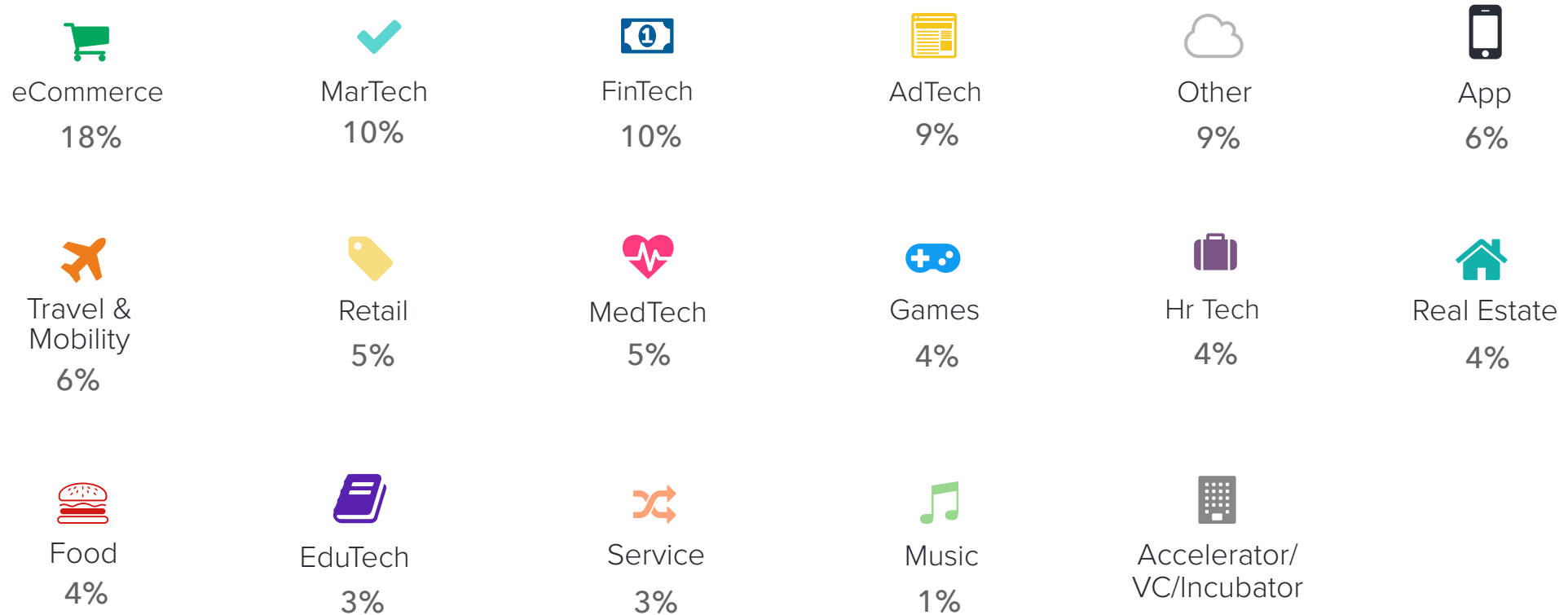
Honeypot's

BERLIN TECH MAP 2016



BERLIN TECH MAP 2016

Colours relate to the toggles on the map*



*Industry percentages are calculated on a random sample of 261 startups. Accelerators, investors, co-working spaces and incubators marked in the map are excluded in the percentage evaluation of industries.

Did you know there are over 1800 active startup companies operating in Berlin? To discover more about them, we took a 10% sample sorted them by industry and mapped them by U-bahn station. The following post details our findings.

East Side versus West Side

According to EY, in 2015 growth in Germany outpaced other European tech regions such as the UK, Sweden or France. With Berlin centered at the beating heart of this growth and home to roughly 1,800 active tech startups, analysts estimate that the city's startups could create between 40,000 and 100,000 new jobs by 2020.

Our research reveals 56% of Berlin's startups are in the former east of the city, clustered around the famous Torstrasse, otherwise known as Silicon Allee.

Pockets of startups can also be found huddled in hubs around Prenzlauer Berg (former East Berlin) and Kreuzberg (former west Berlin). Both of these neighbourhoods once bordered the Berlin wall making loft space in desinstrualized buildings affordable and attractive.

Berlin's startups are largely heterogeneous and many escape easy classification. Our sample showed that eCommerce and AdTech dominate, while FinTech, retail technology and marketing solutions also have significant representation.

The industries

How did we define each industry?

eCommerce:

eCommerce, rental, auction

AdTech:

Big data, data analytics, data management, BI, data visualization, bidding, retargeting, audience management

FinTech:

Payment solutions, crowdfunding, investment tools, banking, insurance

Marketing Solutions:

Cross channel marketing, content solutions, email marketing, lead generation tools

Retail:

Classifieds, enterprise software, inventory, local sales search, instore analytics, returns

Apps:

Lifestyle Apps

Food Delivery:

Groceries, lunch delivery, order platform

Games:

Games

Travel:

Travel services, hotel booking, rental services

Real Estate:

Real estate platform, moving platforms

EduTech:

Learning platforms, tutoring

Health:

Health and medical startups

Service:

Chauffeur services, cleaning services, office management services

HR:

Human Resources solutions

Music:

Streaming, music software and hardware

Other:

Some startups just escape definition!

eCommerce

18% of our sample are eCommerce companies. Zalando, Berlin’s most famous eCommerce startup, was founded in 2008 by Robert Gentz and David Schneider. In Autumn 2014, Zalando IPO’d to the tune of €5.3 billion.

Spurred by Zalando’s success, Berlin’s eCommerce landscape today is varied. It’s possible to find companies specialized in the sale of classic car parts , luxury watches, perfume, glasses and many other niche items.

Companies are also playing with the business model, trying out new forms of ownership and service. ByeBuy, for example, are offering phones, gaming consoles and other products on a pay as you go basis, while Outfittery and Modomoto offer personal stylists to assist in sartorial decisions.

99chairs	U Naturkundemuseum
Auctionata	S Tiergarten
Bjooli	U Weinmeisterstr.
Bonial	U Warschauer Str.
Bonagora	U Klosterstr.
ByeBuy	U Kochstr.
Campanda	U Uhlandstraße
CASA Home & Living	U Rosa-Luxemburg-Platz
Contorion	U Kochstr.
Coffee Circle	S Wedding
DaWanda	U Charlottenburg
Discounto	S Halensee
Erento	U Schlesisches Tor
Flaconi	U Moritzplatz
Home24	U Senefelderplatz
Idealo	U Moritzplatz
Junique	U Heinrich-Heine-Str.
Knip	U Kochstr.
Kreatize	U Kochstr.
KW-Commerce	U Mierendorffplatz
Lesara	U Eberswalder Str.
Lyke	S Oranienburger Str.

Mirapodo	U Kleistpark
Mister Spex	S Greifswalder Str.
Modomoto	U Mehringdamm
Moema Espresso	U Senefelderplatz
Momox	U Samariterstr.
MONOQI	U Rosenthaler Platz
mycs	S Treptower Park
MyHammer AG	U Stadtmitte
MYTOYS GROUP	U Kleistpark
Outfittery	U Moritzplatz
Urbanara	U Weinmeisterstr.
reBuy	U Kleistpark
RunaShop	U Naturkundemuseum
Vaola	U Bernauer Str.
Vergleich.org	U Heinrich-Heine-Str.
Visual Meta	U Spittelmarkt
WatchMaster	U Schwartzkopffstr.
Wayfair	U Schlesisches Tor
Weissmaler	U Rosa-Luxemburg-Platz
Wine in Black	U Naturkundemuseum
Zalando	U Rosa-Luxemburg-Platz

MarTech ✓

Following on from eCommerce, Marketing Solutions startups had the second biggest representation amongst our sample (10%).

Sometimes referred to as MarTech, this industry in its broadest sense can also encompass BI, analytics, AdTech and even eCommerce.

Our definition focuses on marketing operations, including areas such as cross channel marketing, content solutions, email marketing and lead generation tools.

According to Venture Beat, marketing technology startups have secured \$134 billion in venture funding in the last five years. ZanoX is one of Berlin's most successful MarTech startups. Formed in 2000, the affiliate marketing superstar today has over 800 employees in 11 offices across the globe.

360dialog	U Rosa-Luxemburg-Platz
Basilicom	U Schönleinstr.
blogfoster	U Oranienburger Tor
CrossEngage	S Nordbahnhof
Contentful	U Moritzplatz
DC Media Networks	U Eberswalder Str.
DigitaleSeiten	U Rosa-Luxemburg-Platz
evania video	U Kurfüstendamm
Exozet	U Platz der Luftbrücke
Fanpage Karma	U Kottbusser Tor
flexperto GmbH	U Kurfüstendamm
Gamewheel	S Potsdamer Platz
Kyto	U Oranienburger Tor
LinkBird	U Kurfüstendamm
Newsletter2Go	U Ernst-Reuter-Platz
Optivo	U Spittelmarkt
Opinary	U Senefelderplatz
Uberall	U Oranienburger Tor
UberMetrics	U Alexanderplatz
ReFash	U Rosenthaler Platz
Styla	U Eberswalder Str.
ZanoX	U Warschauerstr.
Talon.One	U Görlitzer Bahnhof
Videopath	U Schönleinstr.

FinTech

The third most common industry in our sample is FinTech. 10% of our sample can be classified as FinTech companies. In 2014, the DACH region (Germany, Austria, Switzerland) attracted the second largest amount of FinTech funding in Europe after the U.K.

Germany's bureaucratic and low-tech banking system leaves space for FinTech companies to seize opportunities. N26 is one of the city's hottest startups, which young tech-savvy clients preferring the branch-free approach to banking.

Berlin is also home to the world's first FinTech incubator, FinLeap, which was founded in 2014.

Barzahlen	U Märkisches Museum
BillPay	U Naturkundemuseum
Bergfürst	U Oranienburger Tor
Blackbill	U Stadtmitte
Bonify	U Prinzenstr.
Brickgate	U Schwartzkopffstr.
Cashboard	U Naturkundemuseum
Creditsafe	S Ostkreuz
FinLeap	U Alexanderplatz
Kapilendo	U Kurfüstendamm
LIQID	U Kurfüstendamm
Mambu	U Klosterstr.
N26	U Klosterstr.
OptioPay	U Warschauer Str.
Orderbird	U Moritzplatz
Payleven	U Eberswalder Str.
ProfitBricks	U Senefelderplatz
Raisin	U Senefelderplatz
Regis24	U Märkisches Museum
Savedo	U Weinmeisterstr.
Smava	U Frankfurter Tor
Taxfix	U Weinmeisterstr.
volders	U Moritzplatz

AdTech

2014 was a breakthrough year for Berlin's AdTech firms, with a number of players, such as Adjust, Remerge, AdSquare and Fyber, successfully exiting or securing funding.

Many point to the legacy of HitFox Group, the company builder focused on AdTech and big data, which acquired or helped to launch companies like AppLift and ad2games, to explain the high concentration of AdTech startups in the city.

Berlin has consolidated its position as Europe's AdTech hub. According to eMarketer, mobile ad spend will top \$100 billion in 2016. Despite this, competition in the city is fierce and Berlin's AdTech industry will likely see consolidation in 2016, similar to what has been seen internationally.

Ad2Games	S Hackescher Markt
Adjust	U Senefelderplatz
Adsquare	U Rosa-Luxemburg-Platz
Applause	U Schlesisches Tor
AppLift	S Hackeschermarkt
crobo	U Senefelderplatz
Contiamo	U Bülowstr.
Datapine	U Görlitzer Bhf
DeltaMethod	S Hackescher Markt
Fyber	S Oranienburger Str.
glispa	S Schönhauser Allee
GameGenetics	U Rosa-Luxemburg-Platz
IconPeak	U Naturkundemuseum
LiquidM	S Schönhauser Allee
Mapegy	U Ernst-Reuter-Platz
Plista	U Klosterstr.
Roq.ad	U Schönleinstr.
Remerge	S Oranienburger Str.
Sociomantic	U Kottbusser Tor
The Adex	U Rosa-Luxemburg-Platz
Trademob	U Naturkundemuseum
Webtrekk	U Naturkundemuseum
YOC	U Senefelderplatz

Retail

While retail technology is still relatively new, the recent proliferation in the US of mobile point of sales solutions, inventory software and location based technology to guide on-site shopping, has inspired many in Berlin.

KaufDa is one of Berlin's earliest pioneers of retail technology - the site allows consumers to search for the best sales and mobile couponing running near where they live. In 2011 Axel Springer bought a 74.9% stake for a reported USD \$40 million.

While retail tech is still underdeveloped, market interest is beginning to grow and Berlin startups will no doubt be part of the fun. This year it represents 5% of our sample.

9Cookies	S Oranienburger Str.
Auto1	U Gneisenaustr.
Carmudi	U Kottbusser Tor
Inventorum	U Voltastr.
Itembase	S Anhalter Bhf
KaufDa	U Frankfurter Tor
Käuferportal	U Französische Str.
Locafox	U Kottbusser Tor
Minodes	U Kochstr.
Newstore	S Treptower Park
OLX	S Hauptbahnhof
Products Up	U Oranienburger Tor
Qipu	U Rosenthaler Platz

Other

The remainder of our sample is heterogeneous, split across various industries, including Games, Mobile Apps, Health, EduTech, Food Delivery, Travel, Real Estate, HR, Service, and other.

Food startups are in a fierce battle for control of the city’s takeaway consumers. Delivery Hero, an online food and beverage-ordering service operating internationally in 29 countries, is the champion of Berlin’s food delivery startups and one of the city’s “unicorns”.

2015 was a positive year for Berlin’s travel startups, with two bumper financing rounds back to back. Travel planner platform GoEuro raised \$45 million in December 2015, in a Series B round led by Goldman Sachs, while GetYourGuide raised \$50 million one month earlier.

HR tech startups are addressing some of the most consistently-felt problems by businesses: payroll, compliance, recruitment and talent management. At Honeypot we are on a mission to make tech recruitment more efficient and more transparent. Others in the city, such as GoHiring, are looking at clever ways to automate job postings.

Berlin is home to a number of high profile gaming startups, such as Wooga, which contribute to the success of the online, social network and browser games developer here. Berlin games companies now export their games to over 50 countries worldwide.

Airfy	U Moritzplatz
Candis	U Bernauer Str.
Complevo	U Ernst-Reuter-Platz
Dalia Research	U Görlitzer Bahnhof
erasys	S Potsdamer Platz
FreightHub	U Rosa-Luxemburg-Platz
Here	U Naturkundemuseum
HELLA Aglaia	U Schönhauser Allee
HelloCoach	U Gesundbrunnen
Homify	U Voltastr.
Inselberg	U Eberswalder Str.
jovoto	U Moritzplatz
KIWI.KI	U Voltastr.
Klickrent	S Treptower Park
kloeckner.i	U Bernauer Str.
onrooby	S Treptower Park
Sensorberg	U Mohrenstraße
Service Innovation Labs	U Heinrich-Heine-Str.
Signavio	U Wittenbergplatz
Trecker	U Kochstr.
Travis CI	U Frankfurter Tor
Think cell	U Oranienburger Tor
Ubitricity	S Schöneberg
Vigour	U Nollendorfplatz
ZenMate	U Moritzplatz



Travel & Mobility

AbroadWith	U Moritzplatz
Advanced Telematic Systems	U Kurfürstendamm
Alcandia	U Schwartzkopffstr.
Distribution Technologies	U Gesundbrunnen
FlixBus	S Messe Nord
GetYourGuide	S Greifswalder Str.
GoEuro	U Senefelderplatz
Guestbird	U Schwartzkopffstr.
HolidayPirates	U Jannowitzbrücke
KAYAK	U Ostbahnhof
SuitePad	U Kochstr.
T Dispatch	U Weinmeisterstr.
TruckIn	S Prenzlauer Allee
Wimdu	U Voltastr.
Zizoo	U Hallesches Tor



App

Affinitas	U Kottbusser Tor
Carjump	U Mehringdamm
CleverShuttle	U Friedrichstr.
Dubsmash	U Weinmeisterstr.
EyeEm	U Kottbusser Tor
Joidy	U Alexanderplatz
Kitchen Stories	U Görlitzer Bhf
Memorado	U Kottbusser Tor
MyTaxi	U Rosa-Luxemburg-Platz
Onefootball	U Greifswalder Str.
ParkTag	S Charlottenburg
Splash	U Friedrichstr.
TvSmiles	U Kochstr.
Uberchord Engineering	U Senefelderplatz
Wire	S Hackescher Markt



MedTech

7NXT	U Jannowitzbrücke
Clue	U Kottbusser Tor
humly	U Kottbusser Tor
Mediteo	U Hausvogteiplatz
MeeDoc	U Hausvogteiplatz
Medexo	S Schöneberg
MediDate	U Eberswalder Straße
Medigo	U Rosenthaler Platz
NeuroNation	U Moritzplatz
Sanubi	S Landsberger Allee
Vimeda	U Stadtmitte
viamedo	U Görlitzer Bahnhof



Games

Aeria Games	U Schlesisches Tor
Crowdpark	U Schönleinstr.
Fox & Sheep	U Rosenthaler Platz
GameDuell	U Hausvogteiplatz
Glück Games	S Sonnenallee
Kabam	U Senefelderplatz
King	U Französische Str.
Pfeffermind	U Schwartzkopffstr.
Softgames	U Rosa-Luxemburg-Platz
TresureHunt Studios	U Oranienburger Tor
Wooga	U Rosa-Luxemburg-Platz



HR Tech

Bookastreetartist	U Kochstr.
GoHiring	U Schönleinstr.
Honeypot	U Eberswalder Str.
HeavenHR	U Rosa-Luxemburg-Platz
HeyJobs	U Kottbusser Tor
hocaboo	U Blisserstr.
Small Improvements	U Weinmeisterstr.
Tandemploy	U Senefelderplatz
Valsight	U Uhlandstr.
Viasco	U Mehringdamm



Real Estate

Homeday	U Naturkundemuseum
ImmobilienScout	S Ostbahnhof
Lamudi	U Mehringdamm
LEVERTON	U Stadtmitte
McMakler	U Rosa-Luxemburg-Platz
MyKeys24	S Bundesplatz
Movinga	U Schönhauser Allee
Movago	U Reinickendorfer Str.
Store2be	U Kochstr.



Service

Auto1 Group	S Schönhauser Allee
Blacklane	S Julius-Leber-Brücke
Book a Tiger	U Jannowitzbrücke
Carmudi	U Görlitzer Bhf
Helping	U Französische Str.
Service Partner ONE	U Senefelderplatz
Thermondo	U Bernauer Str.
Websitebutler	U Schwartzkopffstr.
Vimcar	U Eberswalder Str.



Food Delivery

Bonativo	U Kottbusser Tor
Deliveroo	U Adenauerplatz
Delivery Hero	U Stadtmitte
EatFirst	U Senefelderplatz
Foodora	S Ostkreuz
Foodpanda	S Ostkreuz
HelloFresh	U Rosa-Luxemburg-Platz
Lunchio	U Prinzenstr.
Marley Spoon	U Kottbusser Tor



EduTech

Babbel	U Gneisenastr.
Blinkist	S Sonnenallee
Iversity	S Schönhauser Allee
K.Lab Edumedia	U Karl-Marx-Str.
Research Gate	U Naturkundemuseum
Skive	S Sonnenallee
SofaTutor	U Frankfurter Tor



Music

Ableton	U Rosa-Luxemburg-Platz
Lofelt	U Warschauser Straße
Native Instruments	U Schlesisches Tor
SoundCloud	U Bernauer Str.
Stagelink	U Moritzplatz



Accelerator/Incubator/VC

Berlin's venture capital firms, incubators, accelerators and code schools

Growth of startups in Berlin has traditionally been hampered by a lack of funding. However, over the course of 2015 and early 2016, approximately 15 new \$50M+ early stage VC funds based in Berlin have been raised or incepted.

Combined with increased engagement from international investors such as Baillie Gifford, Goldman Sachs, DST Global and others, a self-nurturing ecosystem is beginning to emerge.

Berlin is also home to a number of interesting accelerators, incubators and company builders, creating a thriving and supportive environment for budding entrepreneurs.

Rocket Internet is undoubtedly the most famous company builder from Berlin and one of the city's largest employers. Founded by the three Samwer brothers, the incubator, which runs a company cloning business model, was valued at €6.5 billion when it IPO'd in 2015. Rocket has invested in or launched some of Berlin's biggest companies, including Delivery Hero, Zalando and Wimdu.

Some other notable examples of incubators and accelerators include Factory, which partners with Google to provide events and training, Microsoft Ventures, hub:raum, and Axel Springer Plug and Play. As for coding bootcamps and schools, Berlin's Spiced Academy, is leading the pack, offering intensive fullstack web development and data analytics courses, from its airy loftspace in Schöneberg.

Axel Springer Plug and Play	U Kochstr.
Berlin Venture Partners	U Schwartzkopffstr.
Blue Yard	U Rosenthaler Platz
Covus Group	U Senefelderplatz
Davidson Technology	U Wittenbergplatz
Growth Debt	
Earlybird	U Kochstr.
e.venture	U Weinmeisterstr.
German Startup Groups	U Platz der Luftbrücke
hy!	U Kochstr.
Hardware.co	U Moritzplatz
Heilemann Ventures	U Rosa-Luxemburg-Platz
hub:raum	U Nollendorfplatz
HitFox Group	U Alexanderplatz
M Cube	U Schönleinstr.
Point Nine Capital	U Französische Str.
Partech Venture	U Rosenthaler Platz
Project A Aventures	S Nordbahnhof
Rocket Internet	U Oranienburger Tor
Startup Bootcamp	U Kochstr.
The Founder Institute	S Ostbahnhof
Vogel Ventures	U Mohrenstr.
WestTech Ventures	U Rosa-Luxemburg-Platz
XL Health	U Hausvogteiplatz
You Is Now	S Ostbahnhof

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Berlin Tech Map 2016

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