

Romanian Urban Mobility Startup Ecosystem Overview Report 2023













ICEBERG[†]

Iceberg+ as an innovation and technology transfer consulting company with expertise in European and national projects, manages the CITT-I4T technology transfer center specialized in Smart City, Industry 4.0 and e-Health, founded the FIT Digital Innovation Hub. It manages the EIT Manufacturing Romanian Hub and coordinated the EIT InnoEnergy Romanian Hub (2019-2020).



The Romanian Federation of Metropolitan Areas and Urban Aglomeration is a non-governmental organization supporting the polycentric development of metropolitan areas and aglomerations through territorial, social and economic cohesion. In partnership with the Association for Metropolitan Mobility (AMM), have implemented the "METROPOLITAN" project supporting the Municipalities public transport infrastructures.



Spherik, as the first Romanian accelerator and Best Romanian Acceleration program, StartupEurope Ambassador in Romania in 2018 and founder of the CEE Startup Network in 2019 under Commissioner Maryia Gabriel, coordinates since 2013 one of the most representative community of entrepreneurs, companies, investors and universities supporting the regional ecosystem of innovative startups.



Activize's mission is to contribute to the growth of European tech & startups ecosystem by leveraging on the needs and strengths of various regional ecosystems and existing networks. Their aim is to monitor and gather information about the startups ecosystems in Eastern Europe and deliver it to stakeholders in a meaningful and useful way.

With the support of EIT Urban Mobility





EIT Urban Mobility, an initiative of the European Institute of Innovation and Technology (EIT), a body of the European Union, aims to accelerate solutions and the transition towards a user-centric, integrated and truly multimodal transport system.

As the leading European innovation community for urban mobility, EIT Urban Mobility works to avoid fragmentation by facilitating collaboration between cities, industry, academia, research and innovation to solve the most pressing mobility challenges of cities.

Using cities as living labs, its industry, research and university partners will demonstrate how new technologies can work to solve real problems in real cities by transporting people, goods and waste in smarter ways.

For more details: https://www.eiturbanmobility.eu/



Introductory words

The Romanian Urban Mobility Ecosystem Overview Report has been developed by the partners involved in the EIT Urban Mobility RIS Hub with the purpose of providing an oversight of all "movers and shakers", public and private organizations that are contributing to "positive changes in the way people move around cities in order to make them more liveable places".

Economic and societal development of Romania, especially in the past 14 years since joining the European Union have massively increased the amount of people, freight or waste that needs to be moved around cities, thus leading to Romanian cities ranking among the most cluttered and congested ones in Europe.

It is only recently that INRIX 2020 has ranked Bucharest as the most congested city in the world by hours lost in traffic. To tackle such challenges we can tap into the creativity and technological knowledge of startups and innovators emerging in the national ecosystem, as well as into the ones from the Europe-wide EIT Urban Mobility network.

Throughout the past couple of years, as a result of the COVID-19 pandemic, the urban mobility startup scene has undergone a significant transformation. At a global scale, although sectors such as logistics and delivery have strived, the overall number of mobility unicorns has actually decreased (https://tnmt.com/infographics/mapping-all-unicorns-in-travel-mobility-tech/).

Nevertheless, more than ever cities and their citizens are looking into using technology enabled mobility innovations as part of their daily lives and businesses, thus creating more and more opportunities for innovators, startups and investors.

Introductory words

In following EIT Urban Mobility's quest for enabling partnerships that enable more livable urban spaces and build a prosperous future for our cities, we embarked on the endeavor of mapping out startups, innovators, policy makers, decision makers, experts, researchers.

This overview report will provide you with not only an overview into the quantities and qualities of the urban mobility ecosystem of Romania, but it will also enable you to navigate among and reach out to stakeholders that might match your area of interest in this sector.

We plan to regularly update this report, and hope that in the years to come it might enrich its content especially on its startup and innovation dimensions.

EIT Urban Mobility runs an interactive map of startups supported through its programs, which you can check out <u>here</u> and through our work we hope that we'll be able to find as many Romanian startups on this map as possible.



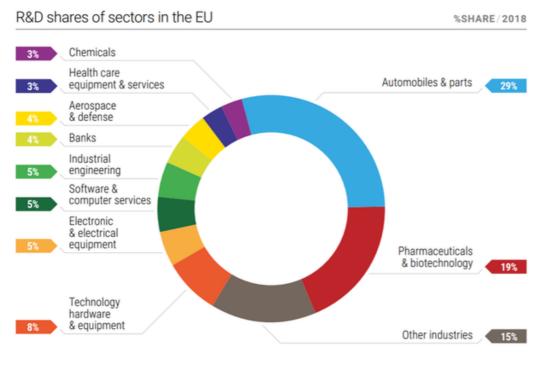
Trends in Urban Mobility area

One of the biggest perks of living in the 21st century is represented by having access to a well defined and diverse transportation system providing freedom and mobility for all, enabling us to have direct access to various places regarding education, health and employment.

Brief overview on the European ecosystem

According to the Automobile Industry Pocket Guide 2020 edition published by the European Automobile Manufacturers Association, there are 313 million motor vehicles in circulation in Europe, which is more than one for every two Europeans. Moreover, in 2019, more than 18.5 million vehicles were produced in Europe, which represents 20% of the global vehicle production.

We can talk about the automotive industry as one of Europe's most important and innovative sectors. No wonder that this industry is far the biggest spender on R&D in the EU, investing over €60.9 billion. This gives us the opportunity to have an advantage over the global competitors and of course, to make significant transformations in the mobility industry.



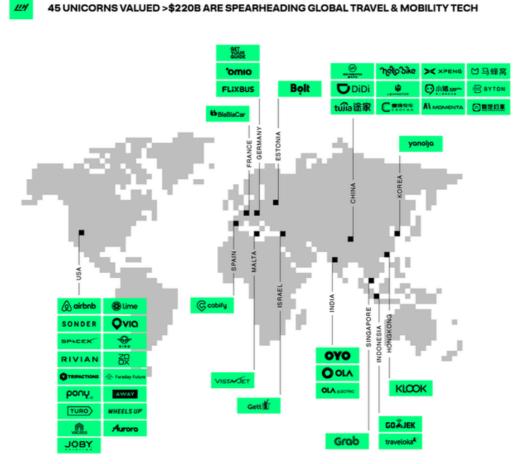
SOURCE: THE 2019 EU INDUSTRIAL R&D INVESTMENT SCOREBOARD, EUROPEAN COMMISSION

Trends in Urban Mobility area

In correlation to the investments made in this field, it is not a surprise to see that in the EU, according to our startup monitoring index, there are over 1,200 startups active in this industry. We used the following criterias to make the selection: only startups which were established after 2018 with headquarters in Europe.

Based on one of Dealroom's reports, in Europe the most significant unicorns from the automotive industry are BlaBlaCar, Bolt, Omio, Flixbus, Cabify and AUTO1 Group. These companies managed to grab on the opportunity provided by this rapidly changing era, they started capitalising on technology and this way they made good use of web and mobile applications, revolutionising the way of booking a ride in Europe.

Nevertheless, Europe still lags behind the US which has 17 unicorns in travel and mobility and China which has 12 unicorns.



Source: Lufthansa Innovation Hub / travelandmobility.tech, PitchBook, Crunchbas

Trends in Urban Mobility area

How about the Romanian Ecosystem?

According to the statistics published by the General Directorate for Driving Licenses and Car Registration from Romania, there has been a constant increase in the number of passenger vehicle registrations in the country; from 2015 to 2019, these numbers have almost doubled: from 81.175 to 161.564 registrations per year.

Taking note of this, we could say that people are showing more interest towards the comfort of travel/commuting which comes with new challenges and potential solutions coming from startups (as you'll see below).

On the other side, although not yet backed by statistics in Romania, but observable already, ownership in personal cars will slightly diminish in the upcoming years as people will have more options for commuting and travelling.

In the Romanian ecosystem, according to our database, there are 90 startups active in the area of mobility and transportation, these provide various services, from parking and traffic management systems to carpooling and ride-sharing applications.

In the following part of the overview, we will group the startups according to their main area of practice and we will talk about each category shortly, while pointing out some important trends too.



Solutions for traffic management, parking, pollution

The lack of parking spots in urban areas is an issue that needs to be resolved as it's a permanent stress factor and one of the main causes of traffic jams, and consequently excessive pollution.

In theory, there are numerous solutions to this problem, from image and video analysis using AI, to people choosing public transportation, bicycles or even walking instead of using cars. These ideas could be put into practice, as many countries in Europe are already known for their eco-friendly transportation systems based mainly on two wheeled vehicles, but the transformation takes years and it happens gradually as it also requires a change in people behavior and mindset.

Regardless of the slow transition towards a better managed traffic situation, people have already started looking for alternatives that stand in their power. Motorcycles have remained one of the most efficient ways of avoiding being caught in a traffic jam in the public eye, and more solutions for mitigating safety issues have started to come to market. One of them is RIDESAFE, an loT motorcycle crash detection and emergency call safety device that sends real-time critical information about your location and medical profile in case of need, making your motorcycle smarter using advanced technologies to track your performance while riding and watch over you motorcycle while parked.

For traffic management, we can mention INTERACT (focusing on efficiency and safety collaborative traffic functions in smart intersections) and LooPark - (end-to-end solution that aims to mitigate traffic jams inside large parking spaces).

Worth mentioning for transport optimization is iRoutePlan which is is a cloud based solution that aims to offer for public transport operators a way of

optimizing cost. Given a fixed transport program that a transport company has to execute, the software will offer optimized solutions of driver and vehicle programing.

Furthermore, the sustainable transportation trend has created a few startups that offer not only the option of finding the fastest routes, but also the most eco-friendly. CityMapper has added all private transport brands including cabs, cycles, scooters to their app so their 50M+ users can get from A to B in every way possible. The same principle was also introduced in Bucharest by MOTUM, a MaaS application that works as an integrator of Bucharest's data sources and incentivizes drivers towards transport means alternative to the private vehicle by means of reward and gamification systems. Worth mentioning is BANG! provides a bike assistant for navigation and guidance.

In Romania, we know about 13 startups tackling parking problems, in various ways, like CityParking (parking spotting solution with easy integration capabilities to any city data infrastructure and analyzer of parking behaviors in urban areas), ParkPay (parking app for cars), Rastel.io (parking solution for bikes). Other fitting examples would be Parking Wizard (a cross-platform app composed from a machine-learning algorithm, a desktop and a mobile app, which aim is to help drivers find available parking spots in their area), yeParking (an in-app, real-time residential and business parkings availability and booking system) and ZenParking (a smart-parking solution that enables users to reserve their parking spots before departure).

At the same time, parking is a pressing problem for alternative transportation as well. With electric scooters being a more and more appealing solution for last mile transportation, the need for safe parking charging options has also raised considerably in the last few years. In this regard, CityDock is building custom docking stations for charging and securing private owned e-scooters, enabling private and shared fleets to be more organized, reliably charged and secured, eliminating dreaded scooter clutter from the streets. EVConnect is providing charging stations for electric cars, while Charger.ro is an online platform for green solutions for EV vehicles.

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Urban micro-mobility and commuting

Although it's a big challenge to create the business model and to figure out the logistics of urban mobility, their utility and success it's not only proven by the multi-billion value of the unicorns existing in the world, but also by the number of investments in their respective projects, which also illustrates the need for new eco-friendly ways of transportation.

As to back up the previous statements, investments in new mobility startups have increased significantly since 2010, micro mobility companies increased their investments by a factor of more than five from 2014 to 2018, making possible the quick development of companies like Bird or Lime into unicorns, in less than 20 months.

There are also a few Romanian startups tackling the issue of micro-mobility and commuting, like Fast Rides (carpooling platform for employees of companies), Cruze (a corporate carpooling platform that matches drivers and passengers going in the same direction) and Teleport (electric car sharing service).

Worth mentioning here is that, based of the experience from CleverTaxi, Mihai Rotaru founded UrbanAir which offers users a single app that aggregates +100 shared mobility providers worldwide: e-scooters, bikes, mopeds and 4 wheeled vehicles.

The challenge for startups in urban mobility comes from the logistics and cost involved in acquiring the vehicles and management of the fleet, so such a startup cannot be started without a lot of capital and a solid structure.

Urban mobility in Romania is dominated by the unicorn startups that are battling to serve consumers with the best solutions, Uber, Bolt, Bird, Lime, which makes it quite easy for consumers, but sustainability for them is harsh because of the competition with each other. Probably in the future we'll see the "winner takes all" mindset as we saw in other geographical markets.



Digitalization for drivers

The digitalization trend is also visible for drivers, startups offering to drivers or to various companies the opportunity to digitize documents and license management, insurances for drivers, making them easily accessible, without the fear of losing them.

Besides making reachable all documents in virtual format, there are tries in converting the driving schools learning process in virtual ones. Although real life traffic and every type of driving behavior can not possibly be simulated during on-line driving lessons, these new technologies can provide multiple hours of practice and innovative, interactive ways of learning (ex: VR simulations) about all the aspects that are important in becoming a responsible driver.

As Romanian startups in this field, we can talk about MyCar (a mobile application which enables their users to upload vehicle documents, store them safely and have them always at hand), WashMe (a digital platform where the users can make real-time reservation for car washes in the city), Acte Vanzari Masini (a platform that automates and facilitates the process of car selling, standardizing the flow of information, increasing transparency of transactions, and digitizing the process of completing the necessary documents), Autopia (a mobile application which helps drivers manage everything related to their vehicle) and Autonomy (a digital platform which offers end-users the most flexible car subscriptions for a period of 1 to 12 months).



Future of cars and mobility

When people are talking about the future of cars and mobility, besides the flying cars, the development of electric vehicles is the most frequently mentioned.

As these e-vehicles will become more reachable for the general population too, more startups will be built around these ideas to facilitate the use of electric cars, for example applications that show chargers or charging stations for these vehicles. The transition towards electric fleets is happening to some extent in Romania also, but the infrastructure to support EV needs more development in order to support that.

In the international press we constantly hear about new technologies that enable more diverse solutions related to autonomous driving, connections between cars, electric cars and smart mobility. Unfortunately, Romanian ecosystem will be more of a beneficiary of these advancements and less of a creator and trend setter.

We have an example of a startup co-founded by Romanians: SwissPod (a sustainable transportation company designing and developing Hyperloop vessels and infrastructure which promote efficiency and economic viability). Also, we would like to highlight two Bulgarian startups too: Ampeco (a smart cloud software suite for EV Charge Point management) and Dronamics (an aviation company, which is developing a fixed-wing unmanned aircraft that can transport freight cheaper than other aircrafts).

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Logistics and freight transportation

In the field of logistics and freight transportation, perhaps the most crucial aspects are accessibility and efficiency. Changes and new ideas are mainly implemented with the purpose of delivering products from point A to point B with less effort from both the producer and the customer, meanwhile also taking into consideration reducing traffic jams and pollution.

Among these startups, a few Romanian ones accepted the challenge: Starcargo (a complete transport management system for companies activating in the transport industry), ECON (digital solution focused on improving the efficiency of the waste collection process through AI),

CargoBuddy (solution for optimising costs, time, digitalisations of documents, tracking of merchandise), Cargo24 (a digital platform for on demand transportation services, that connects customers with 700+ transport operators in Romania), Postis.EU (a solution that manages the delivery operations for retail players with complex logistic chain) and Logistia (SaaS that automatically plans routes for your business and dispatches them to your drivers).

Overall, the Covid-19 crisis impacted heavily the domain, regardless if automaker or startup, as transportation and mobility went down by a lot. It's the "survival of the fittest" time. "Being a startup born in Eastern Europe, we have the mindset of paying attention to costs, doing more with less money, which puts in a advantageous position during these times compared with our competitors" says Adrian Pica, Group Product Manager at Bolt.

The global trends are going for reducing pollution, effectiveness in transportation and automation and we see the effects in Romania as well with e-vehicles, micro-mobility, but to a much lesser extent compared with a megalopolis like London or Paris.

Impact of mobility startups is still only present in the main urban areas where it makes sense to be present economically as there is potential for critical mass and more interest/need from users.

Romanian startups in mobility and transportation are active, but of course with much lower volume given by the smaller market, compared with the bigger countries which are much more proactive in this area as mobility is tightly connected with progressive public administrations also.

We see signs of this happening in some cities in Romania, where the administration is more open to supporting a variety of solutions knowing that each of them will decrease a bit the congestion in traffic and improve the life of the citizens, but we still have a long way to go.



Returning to bikes

Even though the car is still considered an element of social status and the most comfortable way of commuting, returning to bikes as a main mean of transportation is starting to become a new trend, being the most reliable, flexible and effective at taking you from door to door over mid-length distances.

An important factor for rediscovering the pleasure and utility of biking was actually the pandemic, as people have looked for other alternatives to public transportation. This was an opportunity for the electric bicycles market, offering a high-powered alternative to crowded subways, buses or trains. Not only do electric bikes promote a more sustainable commute, but they're an easy and convenient way to maintain social distance. Besides individual use, the boom in delivery services over the past two years has determined the choice of a more cost and time effective option for couriers, especially in crowded cities.

The appeal for the use of bikes and electric bycicles has not, however, stopped after restrictions were lifted. The continuous interest in this type of vehicle plays an important role in redefining urban transportation in the years to come, and it's being supported by major initiatives to enhance road safety and promote sustainable transportation options. As an eco-friendly option to cars, the effects of more bicycles on the road would improve traffic congestion, decrease CO2 emissions, improve air quality and promote a better quality of life as cities become more densely populated.

In Romania, two startups have caught the wave of this new trend and are prepared for the change in transport behavior, Veltra Bikes (the first start-up in the world to build city bikes made of laminated bamboo, that are unique, lightweight and more comfortable than a normal bike) and Visum Bike (offering bike parking and renting services).

Challenges

People in cities are migrating from car ownership to other means (renting, biking, ridesharing) that are starting to satisfy the need to travel more without using the personal car. The speed in cities is decreasing so use of scooters, bikes becomes paramount.

Regulations are changing quite a lot in the sense that they are starting to free up parking spaces or driving roads, in order to make bicycle routes or simply urban spaces for movement

Two things you can do as a technology startup in urban mobility: either you build new solutions seeing a need and trying to solve it, or you build solutions for solutions.

The most obvious challenges of startups in this sector are primarily legislation and regulations. It's hard to scale a startup also because of difference in regulations from city to city or country to country.

Administration is interested to talk, but hard to follow-up on and less interested to take risks in working with startups. Difference of expectations and processes between the private sector and the public sector

While investors are not so interested in the field, unless proven track record by the startup / founders. Finding suitable programs to help the development of the startups is a challenge..

As part of the open innovation sessions organized by the EIT Urban Mobility RIS Hub, leaders and experts representing cities and metropolitan areas of Romania have exposed challenges that their respective communities are facing in terms of urban mobility, including:

- inefficiency of traffic flow management;
- lack of urban parking facilities;
- negative health and environmental impact of urban mobility;
- inefficient public transport service;

Challenges

- low integration of micro mobility in urban areas;
- outdated means of public transportation;
- dependency on private automobiles;
- public procurement procedures discouraging acquisition of innovative technologies.

These challenges are well aligned with some of the challenge clusters that EIT Urban Mobility City Club has been defined, including:

- 1. Shift to active modes of transport,
- 2. Avoid negative health, safety and environment impacts of urban mobility,
- 4. Improve public transport service provision and
- 6. Improve traffic flow management.

This shows that the KICs Business Plan can significantly contribute to the solving of said challenges in Romania, while also providing testing grounds for novel technologies, products and services developed within the national ecosystem.

Special thanks to the contributors in this analysis:

- Tudor Macicasan, urban mobility expert
- Mihai Rotaru, CEO @UrbanAir
- Andrada Dugan, Innovation Lab Director ISS France
- Adrian Pica, CPO @Getsafe
- Andrei Rusu, president @Urban Bike Revolution
- Mihai Dragos Ciobanu, founder @EVConnect
- Cristian Astalos, founder @MyCar Assistant
- Mihai Biclineru, founder @CityDock
- Daniel Manasescu, founder @Motum



ECON is a digital solution focused on improving the efficiency of the waste collection process through AI.



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Based on the experience they gained in complex projects with well established corporations, they are building their own product using cutting edge LoraWAN wireless technology that make it possible for low-bandwidth long-range data transfer. Using IoT sensors and gateways, their solution can measure and collect any type of data, state changes and provide remote diagnostics for electronic components or devices, running also on long-life battery.



www.vampirebyte.ro



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Bike facilities, in their case parking and rentals, are an integer part of cycling network, in terms of urban mobility. Their idea of bike parking provides a dedicated solution for cyclists to park their bikes and also comes with a rental option for those that need a different solution to travel. Having an easy access bike parking facility, cyclists are encouraged to use more often the bicycle. They are focused on providing solutions for mobility needs, providing quality and safety, and being responsive to their customers.



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They are building custom docking stations for charging and securing private owned escooters which enables private and shared fleets to be more organized and reliably charged and secured, eliminating dreaded scooter clutter from the streets and we are the first business on the market with charging docks that have a system for both charging and securing e-scooters.



www.citydock.ro



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RIDESAFE is an IoT motorcycle crash detection and emergency call safety device that sends real-time critical information about your location and medical profile in case of need. RIDESAFE makes your motorcycle smarter using advanced technologies to track your performance while riding and watch over you motorcycle while parked.



www.ridesafe.eu



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AUTONOMY

Autonomy is a digital platform which, through its own fleet of electric vehicles or through mobility partners, offers end-users the most flexible car subscriptions for a period of 1 to 12 months. Autonomy's vision is to empower the transition from car ownership to more sustainable alternatives while retaining the availability and accessibility of a means of transportation and reducing the overall transportation costs.



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Logistia is an easy-to-use SaaS that automatically plans routes for your business and dispatches them to your drivers, with O training. Integrates perfectly with ecommerce platforms such as Shopify or WooCommerce, or use it as it is to optimize your last-mile processes. Whether you do 10 or 1000 stops a month, Logistia's route optimization software saves time, cuts costs, and frees up resources to grow your



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CargoBuddy solves one of the major problem in transport industry: cashflow. They are paying the transport companies in 24 hours after they unload at the destination. All the documents are digital so they are saving companies a lot of time and money. Every company can track the merchandise 24/7. Basically they take care of the entire transport process of a merchandise, helping both parts involved.



www.cargobuddy.ro



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ZenParking is all about being relaxed about parking. With inovative reservation system and automated payment, they turn parking in crowded areas in a zen experience!



www.zenparking.ro



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Veltra Bikes is the first start-up in the World, to build city bikes made of laminated bamboo, that are unique, lightweight and more comfortable than a normal bike.



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Fast Rides

Fast Rides is a carpooling platform for employees of companies.

- 1. commuting to work and back home for employees of a company
- 2. mobile apps ios/android
- 3. monthly subscription
- 4. white label solution for just one client



www.gopack-app.com



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CityParking.io is a Parking Spotting solution with easy integration capabilities to any city data infrastructure and a powerful statistics tool and analyzer of parking behaviors in urban areas. For citizens it allows to keep in one place the data relevant to their vehicle and even get access to car services within the app.



www.cityparking.io



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Marketplace for courier services, route management for courier companies, etag(hardware device) that will monitor in real time: location, shock, security, temperature and humidity indexes.



www.cautcurier.ro



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ISOFT SRL

IRoutePlan is a cloud based solution that aims to offer for public transport operators a way of optimizing cost. For a public transport operator the main cost is the wage of the driver than comes fuel cost, vehicle depreciations, maintenance cost, etc. Given a fixed transport program that a transport company has to execute, the software will offer optimized solutions of driver and vehicle programing.



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DriveGrade wants to be a full ecosystem connecting drivers to collaborators and insurance companies willing to incentivize a good driving behaviour. This will improve the damage rates and create the premises for more standardized driving which will make autonomous driving future feasible in highly unpredictable environments.



www.drivegrade.eu



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Marketplace for sending packages/travel with small verified business transportation in Eastern&Central Europe to the West Europe. They are digitizing the small carrier industry.



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Online platform for green solutions.



www.charger.ro



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Parking solution for bikes.



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End-to-end solution that aims to mitigate traffic jams inside large parking spaces.



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Parking app for cars.



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App for administration of cars.



www.my-car.co



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Green mobility app.



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Carpooling app tailor-made for enterprises.



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Transport Cluj Napoca is a mobile application that provides real-time information to public transport users in the Cluj-Napoca metropolitan area, making it easier to plan and navigate their journeys.



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Urban Bike Revolution aims at boosting the transition of motorized mobility to an active one, with a focus on cycling mobility.



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Blume develops products and technologies that aim to increase traffic safety and efficiency using artificial intelligence.



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Tranzy is the mobile app that guides you around the city when you choose to take the bus or tram.



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E-Mobility Rentals created a universal and interchangeable battery that can power 4 different types of cars and 2 differt types of scooters.



www.e-mobility-rentals.com



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www.sewa.ro



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A comprehensive 360 solution that combines micro-fulfilment, last mile delivery and shared electric vehicle fleets to achieve efficient and zero-emission delivery operations. Through our network of city hubs and seamless technology we optimize delivery time, transport and vehicle use.



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Dash wants to encourage biking, providing the first dock less electric bike sharing network and mobile app in Romania and Eastern Europe, in which users can find the closest bike, pay, and navigate through the city.



www.ridedash.eu



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At any Tire2Tire station, our autonomous robot visually inspects each truck's tire while it is refueling. The robot processes images taken automatically to provide almost instantaneous tire wear data.



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