

# Urban Tech Landscape — Poland

 PFR |  Urban Impact

October 2025



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01

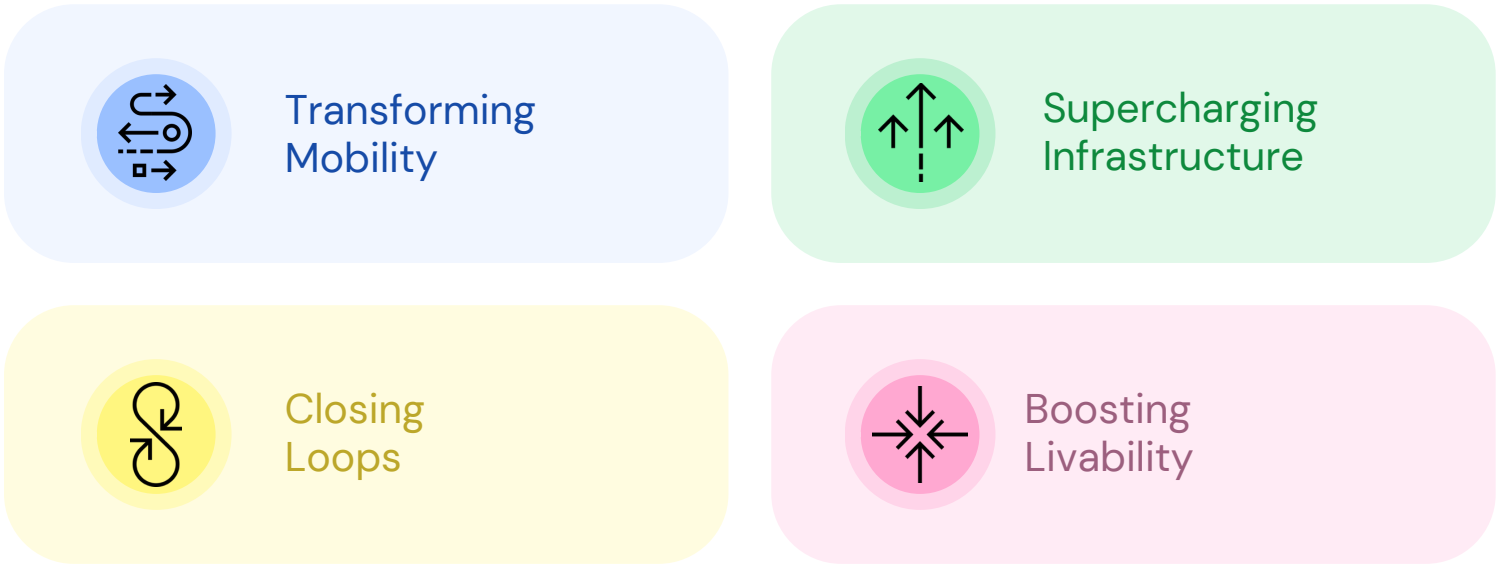
# Introduction & Overview



# What this report is about – and why it matters

This report was created to **strengthen the connection between Polish urban innovators and cities**, and to support the development of technology-driven solutions through testbeds, sandboxes, and real-life collaborations.

Unlike traditional sector-based analyses, this publication does not focus on individual domains such as energy or housing. Instead, it takes a **broader view of the urban ecosystem** – organising insights around key opportunity fields that reflect where the greatest potential for impact lies:



This approach helps identify where innovation, collaboration, and investment can most effectively reshape city life. The report serves as **a tool for municipalities, startups, investors, and ecosystem players** looking to understand and act on the dynamics of urban innovation in Poland. This is the second edition of the Urban Tech landscape report. The **first edition**, released in 2020 by Urban Impact, can still be found [here](#).

This report has been developed by:



An initiative of the Polish Development Fund (PFR), **PFR dla Miast – PFR Cities with its Urban Tech Hub** – supports both municipalities and entrepreneurs in co-creating smarter cities. **By bridging the gap between the public and private sectors**, the program enables local governments to access innovative tools while empowering startups to better navigate city needs. Through education, matchmaking, and strategic pilots, PFR dla Miast accelerates practical, tech-enabled urban development.



Urban Impact is **Europe’s leading ecosystem builder and strategic connector around urban technologies**. We catalyze innovation at the intersection of startups, cities, corporates and investors through education, advisory and networking. With a track record of supporting over 100 founders, launching 60+ initiatives and helping startups raise more than €32 million in funding, Urban Impact plays a key role in advancing the future of urban living through collaboration, experimentation, and bold ideas.

Our Ecosystem Supporters:

 EURAZEO  Inno  vcleaders



# Introduction and methodology

## What is Urban Tech—and Why Now?

**Polish cities** are becoming vibrant hubs for urban innovation. Startups, tech providers, and public stakeholders are coming together to tackle real-world challenges—like mobility, energy, housing, and infrastructure—with smart, scalable solutions.

**Urban Tech is where technology meets city life.** It's a growing ecosystem of data-driven, connected, and intelligent solutions – **both hardware products and software services** – that make cities more sustainable, efficient, and livable.

The classification of solutions is based on **Urban Impact's own Urban Tech Taxonomy**, an evidence-based and expert-curated classification scheme consisting of four main themes, and 20 major opportunity fields in urban tech (see *Annex for full Taxonomy Overview*). In cases where startup solutions fall into more than one theme or opportunity field, we have decided on a primary classification to avoid double-counting in the final analysis.

## Scope of the Report

We included both venture-funded startups and independent solution providers offering urban technologies.

All funding-related data includes both private sources (such as venture capital) and public sources (such as grants) and is limited to companies for which funding data was available.

To be featured in this report, companies had to meet all of the following criteria:

Founded between 2015 and 2024

Founding location / headquarter in Poland

Operating a B2G or B2B business model

Delivering a positive social or environmental impact for cities

**Offering an innovative and scalable technology solution**  
Traditional SME, engineering or consulting type businesses were not included.

### Research & Data Partners

Our research combines input from Europe's leading data providers and trusted open data sources.



Dealroom  
funding data and startup ecosystem



Bable  
funding data for grants and tenders



# Key findings

2015 – 2024

234 

Identified companies in the Urban Tech space, of which **184 are still active**.

Four out of five companies are still alive – a strong showing in a sector that often juggles cap-ex, regulation and long municipal sales cycles.

134% 

No. of companies grew from ~100 in 2020 to **234 today**.

The expansion signals that Polish cities are becoming stronger testbeds and more mature purchasers of innovative technologies.

66% 

Only **154 companies** have received external funding.

This reflects a mixed maturity level. Many companies are still bootstrapped or grant-driven, indicating room for growth in private financing.

203M€

The total capital secured by urban tech startups confirms **solid investor interest**, even in a still-maturing market.

**Early-stage money is plentiful, but companies still face a Series B+ gap** once they need cheques above 10-15M€.

Supercharging Infrastructure

Energy, built environment and infrastructure are Poland's most dynamic investment theme, **attracting the highest level of funding – almost 88M€ – and the largest number of new companies (86)**.

Investors are following Poland's urgent decarbonisation and infrastructure modernisation agenda.

~30 cities

Entrepreneurial activity in Poland is geographically diverse, with **startups emerging from nearly 30 cities**.

However, the **majority are concentrated in Warsaw, Kraków, Wrocław, Poznań, and Gdańsk**, highlighting the continued dominance of major urban centers in driving innovation.



# Geographic hotspots

## Warsaw

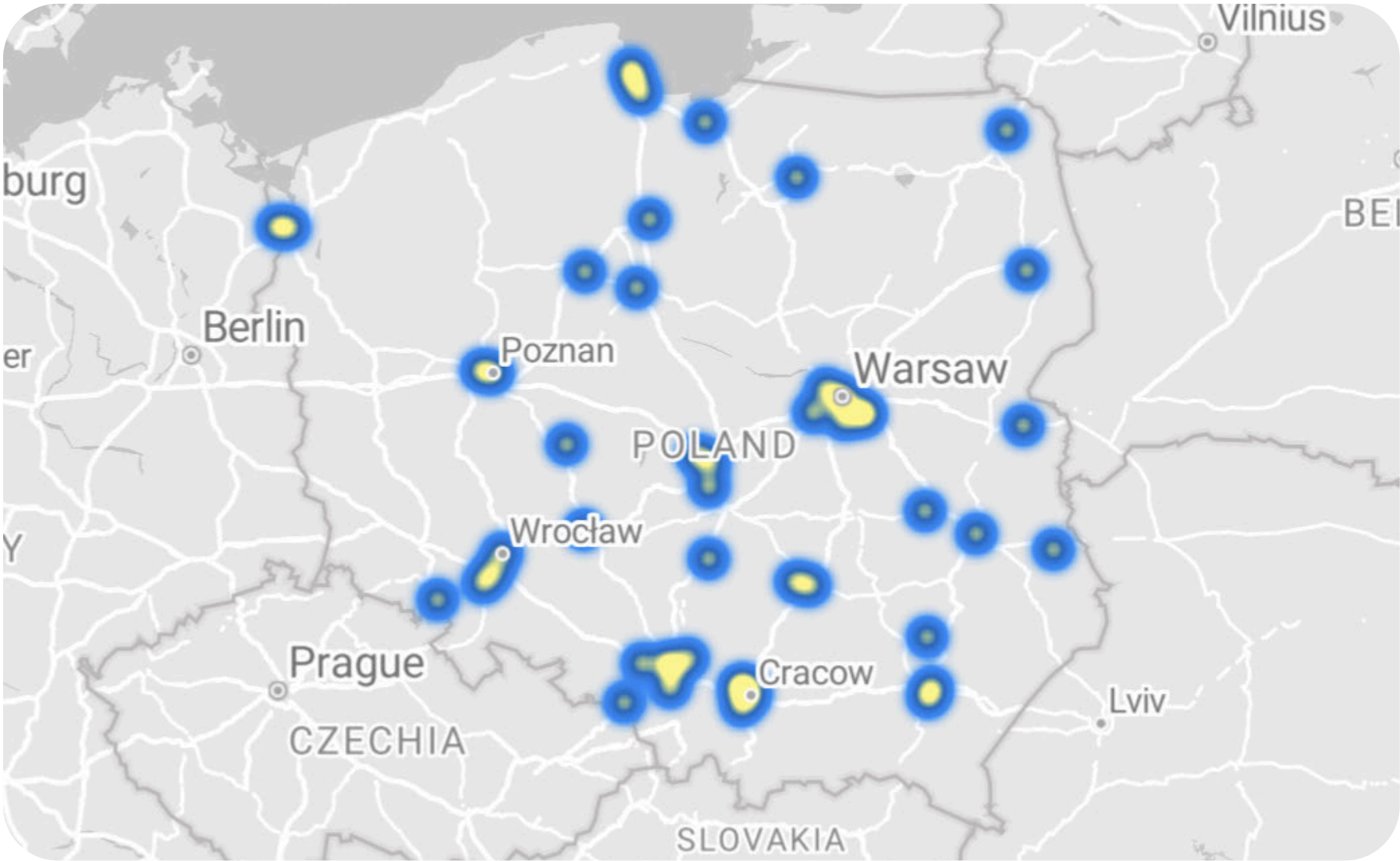
Poland’s leading UrbanTech hub with a strong policy and testing ecosystem.

- Smart City strategy with live testing zones (e.g. Smart Tech Village)
- Initiatives like Warsaw Booster and Smart City Expo PL highlight Warsaw's commitment to innovation and urban development.
- Focus: building efficiency, air quality, mobility, public services

## Kraków

A rising urban tech city with strong institutional support.

- Active in EU smart city initiatives, host of Cities Forum
- Kraków Technology Park supports urban innovation pilots
- Focus: infrastructure, sensor tech, civic engagement



## Gdańsk

Recognized for participatory smart city innovation.

- Gdańsk 2030+ strategy, certified smart city
- ENACT 15-minute city lab in shipyard district
- Focus: sustainable mobility, public space, energy systems

## Wrocław

R&D-driven city integrating smart solutions across sectors.

- Follows Wrocław 2050 strategy with district-level pilots
- Hosts Smart City Forum, collaborates with private sector
- Focus: smart mobility, environment, water/waste systems

## Poznań

Inclusive smart city model focused on data and collaboration.

- Operates Smart City Poznań with open data & digital twin
- Runs Poznań CityLab for co-creation with startups
- Focus: urban services, citizen apps, mobility



# 02 Thematic Chapters & Case Studies





THEME A

# Transforming Mobility.

Transforming the movement of people and goods in cities to provide efficient, safe, clean, accessible and affordable mobility for all. No more traffic jams and achieving Vision Zero!

- A1



**Shared mobility and new vehicle types**

Expanding access to sustainable, lightweight, and flexible urban transport.
- A2



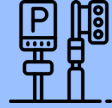
**Robotic and autonomous services**

Automating mobility to increase efficiency, safety, and reach.
- A3



**Urban logistics and last mile delivery**

Making goods movement cleaner, faster, and more adaptive to urban needs.
- A4



**Parking solutions and mobility hubs**

Optimizing space and enabling seamless modal integration.
- A5



**Public transport and traffic management**

Enhancing efficiency, connectivity, and flow in shared urban transit systems.



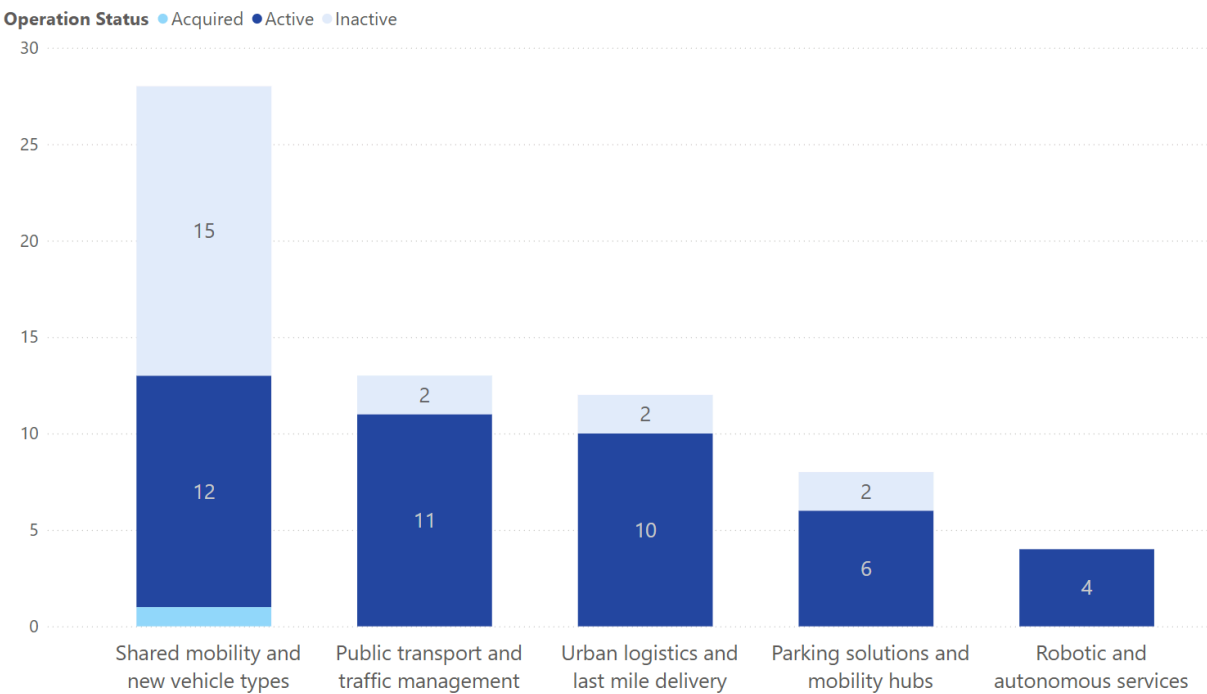


# Key Trends

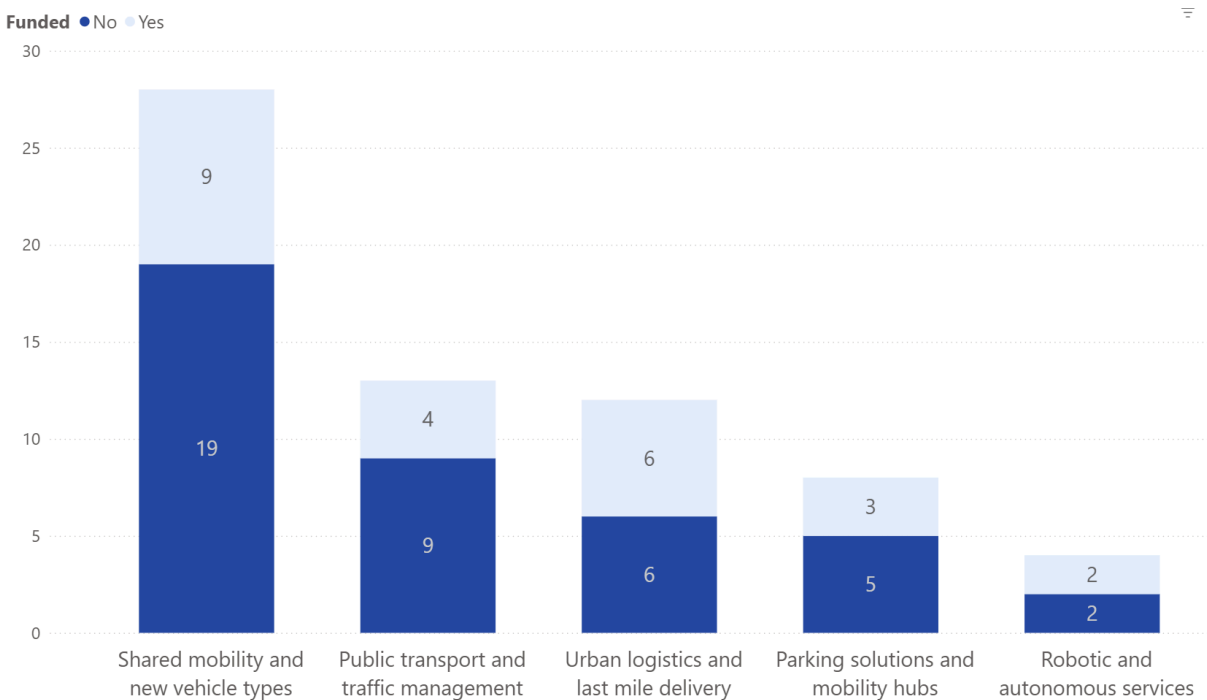
## Stable Pillar, Ready for Its Next Shift

- Mobility continues to be one of the most active sectors in Polish urban tech, with a broad base of founder activity.
- However, its funding intensity has not kept pace, possibly reflecting market saturation or business model limitations.
- Fast start, tough middle. E-scooter, cargo-bike and fleet-software startups mushroomed quickly, but many hit a wall when hardware costs rose and road rules tightened.
- The next frontier may lie in mobility’s convergence with energy and infrastructure, aligning with smart city and climate goals.
- Opportunity: city-level zero-emission-zone mandates arriving in 2026 could open a second growth window for clean-last-mile services.

Company Count by Activity Status Across Fields



How Many Got Funded? Company Breakdown by Field



## Key numbers

2015–2024

Total mobility companies:

66 (28% of all urban tech companies)

Still active:

44 (67% of of all mobility startups)

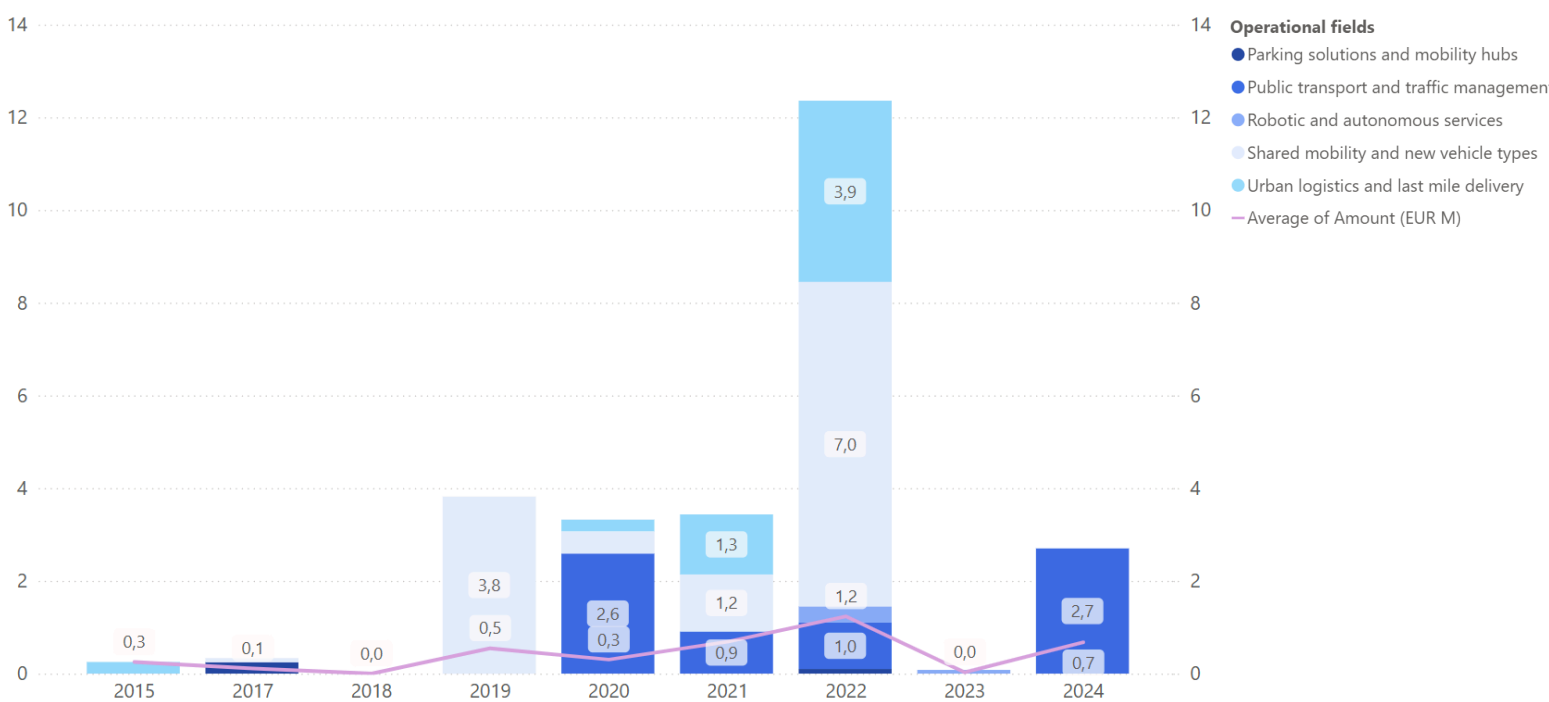
Funded companies:

46 (70% of all mobility startups)

Total funding:

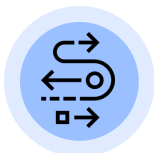
27M€ (13% of all urban tech funding)

Funding Waves by Field and Year (in M€)



Note: All funding analyses in this report are limited to companies for which funding data was available.





# Transforming Mobility

## Key Opportunity Fields Trends

### Shared mobility and new vehicle types

28 companies      Funding 12.6M€



Platforms enabling bike, scooter and vehicle sharing within urban areas and new urban transport vehicle types.

- Packed early-stage pipeline; average round only € 0.45 m → ideas validated, no scale cheques yet.
- Covid boom is over; surviving fleets pivot to B2B commuter passes and campus contracts.
- Tightened parking / speed rules favour operators with superior compliance tech.
- First city-wide zero-emission zones due 2026 could restart funding appetite.

### Robotic and autonomous services

4 companies      Funding 0.5M€



Drones, sidewalk robots and self-driving shuttles aimed at urban deliveries or passenger shuttles.

- Still at pilot/grant stage; drones, sidewalk robots, AV shuttles hunt for sandbox trials.
- 5G roll-out and new AV legislation are the key to unlock.
- Corporate R&D arms, not funds, are the main backers so far.
- Big upside, but talent and capital likely to cluster around one breakthrough proof.

### Urban logistics and last mile delivery

12 companies      Funding 5.7M€

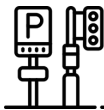


Tech optimizing last-mile delivery, cargo flows, and sustainable logistics.

- Volumes grow with e-commerce, yet thin margins keep funding modest.
- Cargo bike depots & dark stores struggle with labour costs; software-only route tools fare better.
- Partnerships with grocers / parcel giants are the survival path.
- 2026 clean-zone rules could push retailers to bankroll zero-emission operators.

### Parking solutions and mobility hubs

8 companies      Funding 0.3M€

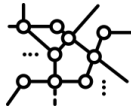


Smart solutions for parking optimization and integrated mobility points.

- Sensor-based smart-parking stays stuck in PoC limbo; municipal sales cycles drag.
- Capital shoestrings (avg 40K€) point to bootstrapped software plays.
- Bundling with EV-charging or kerb-side enforcement tech is emerging as a growth hack.

### Public transport and traffic management

13 companies      Funding 7.2M€



Improving efficiency, routing, and integration of public transport systems.

- Real-time fleet optimisation SaaS wins steady but small contracts.
- EU funds fuel most deployments; private VC remains scarce.
- M&A likely: large ITS integrators already courting top data-platform providers.



Note: All funding analyses in this report are limited to companies for which funding data was available.





# Transforming Mobility

Case Studies

## 3 examples highlighted in the industry in 2025

### Autonomous buses



Robotic and autonomous services offer cities the potential to make transport systems more efficient, accessible, and cost-effective – especially in underserved areas or off-peak hours. However, their adoption is still limited by outdated legal frameworks, infrastructure gaps, and the complexity of real-time navigation in dense urban environments.

**Blees** is tackling these challenges head-on with its BB-1 **autonomous electric minibus**. Designed for flexible, on-demand public transport, the BB-1 has already been tested in Gliwice and Sosnowiec.

These pilots aim to demonstrate how autonomous vehicles can be integrated into municipal systems to complement existing mobility infrastructure and reduce reliance on private cars.

[blees.co](https://blees.co)

Robotic and autonomous services

### Future inter-city travel



Europe’s busy inter-city railways face a dilemma: conventional lines top out near 200 km/h, yet building brand-new high-speed corridors costs billions and takes decades.

**Nevomo** bridges that gap with MagRail – a **passive-maglev and linear-motor kit** that bolts onto tracks already in the ground. The upgrade lets levitating vehicles share the corridor with regular trains, boosting top speed to  $\approx 550$  km/h, doubling capacity and slashing travel time and CO<sub>2</sub> at a fraction of green-field high-speed-rail cost.

In effect, it turns today’s rail bottlenecks into high-speed shared arteries and paves the way for a future hyperloop network.

[nevomo.tech](https://nevomo.tech)

Shared mobility and new vehicle types

### Fuel efficient public transport



Fuel-efficient and sustainable transport aims to cut emissions and energy use through technologies like electric vehicles, alternative fuels, and smart traffic systems. While momentum is growing, cities still face challenges with retrofitting existing fleets and scaling infrastructure.

**VERS** (Vehicle Energy Recuperation System) is a Polish innovation that **boosts the fuel efficiency of city buses** by capturing and reusing energy during operation. As Poland expands its sustainable transport agenda, solutions like VERS offer a practical path to lowering emissions without replacing entire fleets.

[vershybrid.com](https://vershybrid.com)

Public transport and traffic management



THEME B

# Supercharging Infrastructure.

Building net-zero cities by transforming the way we power, build, operate and re-purpose infrastructures and buildings.

- B1



**Urban energy production, storage and delivery**

Building resilient, decentralized systems for clean energy.
- B2



**Infrastructure monitoring and predictive maintenance**

Using tech to prevent failures and extend asset life.
- B3



**Sustainable and low-carbon building materials**

Reducing environmental impact through innovation in construction materials.
- B4



**Smart Buildings and innovative construction**

Creating intelligent, adaptive buildings that improve urban sustainability.
- B5



**New Real Estate and retail models**

Rethinking how we build, use, and share urban spaces.



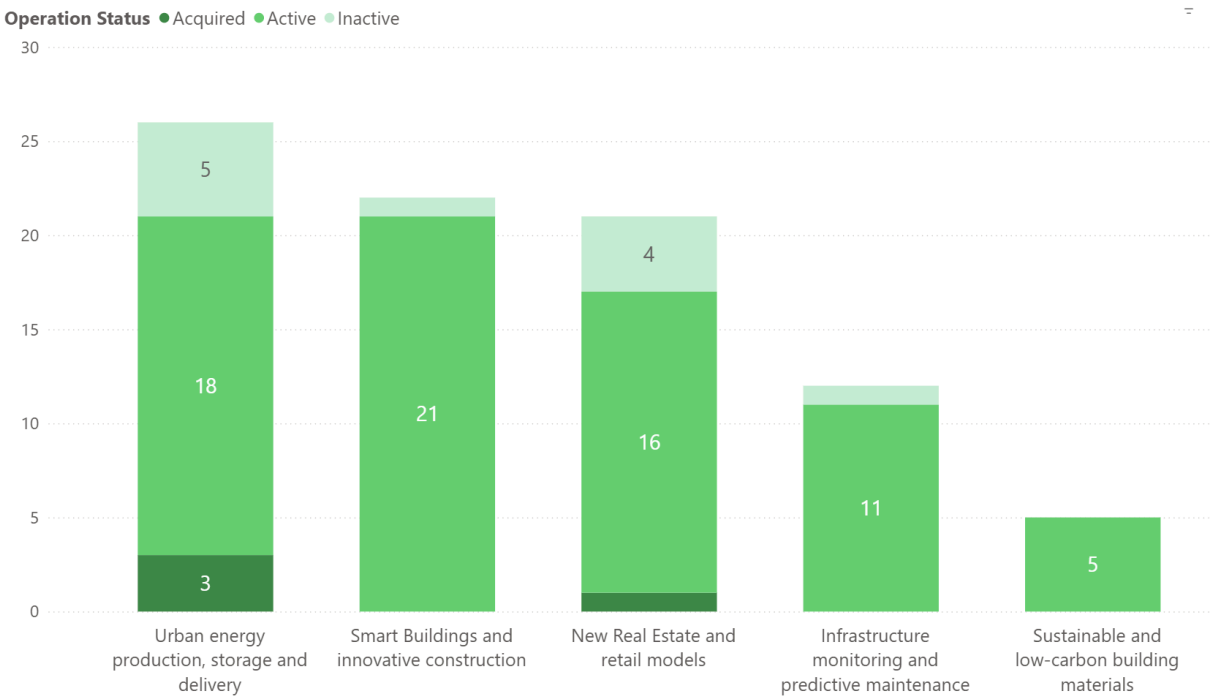


# Key Trends

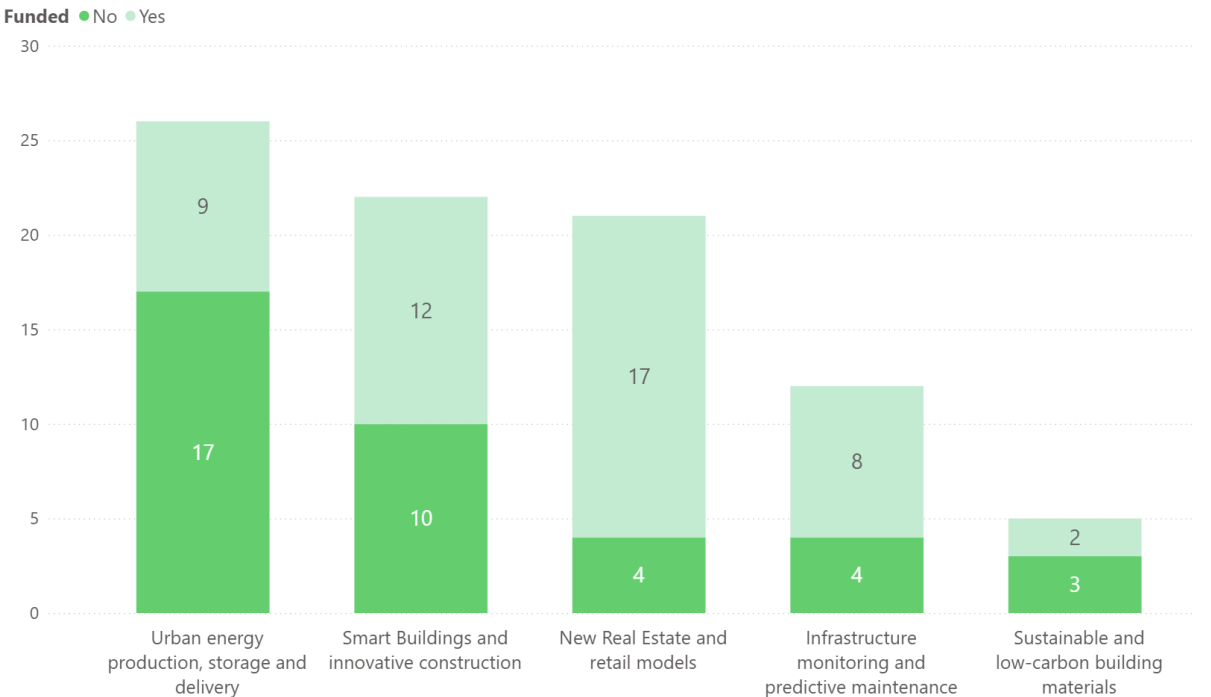
## Takes the Lead – And the Money

- The backbone theme: EV-charging hardware, district-energy optimisation and 5G-enabled sensors attract the deepest pools of cash and the highest survival rate.
- Public-plus-private formula works. National green-infrastructure subsidies combine with corporate energy or telco investors to push ventures past early proof-of-concept.
- The high survival rate points to a solid product-market fit and sustained public-sector demand.
- Overall, it serves as a cornerstone of the ecosystem, both in terms of funding and long-term potential.
- Shift underway: corporates favour minority stakes and long-term supply contracts over full acquisitions, keeping founders in control but demanding solid governance.

Company Count by Activity Status Across Fields



How Many Got Funded? Company Breakdown by Field



## Key numbers

2015–2024

Total infrastructure companies:

86 (37% of all urban tech companies)

Still active:

71 (83% of all infrastructure startups)

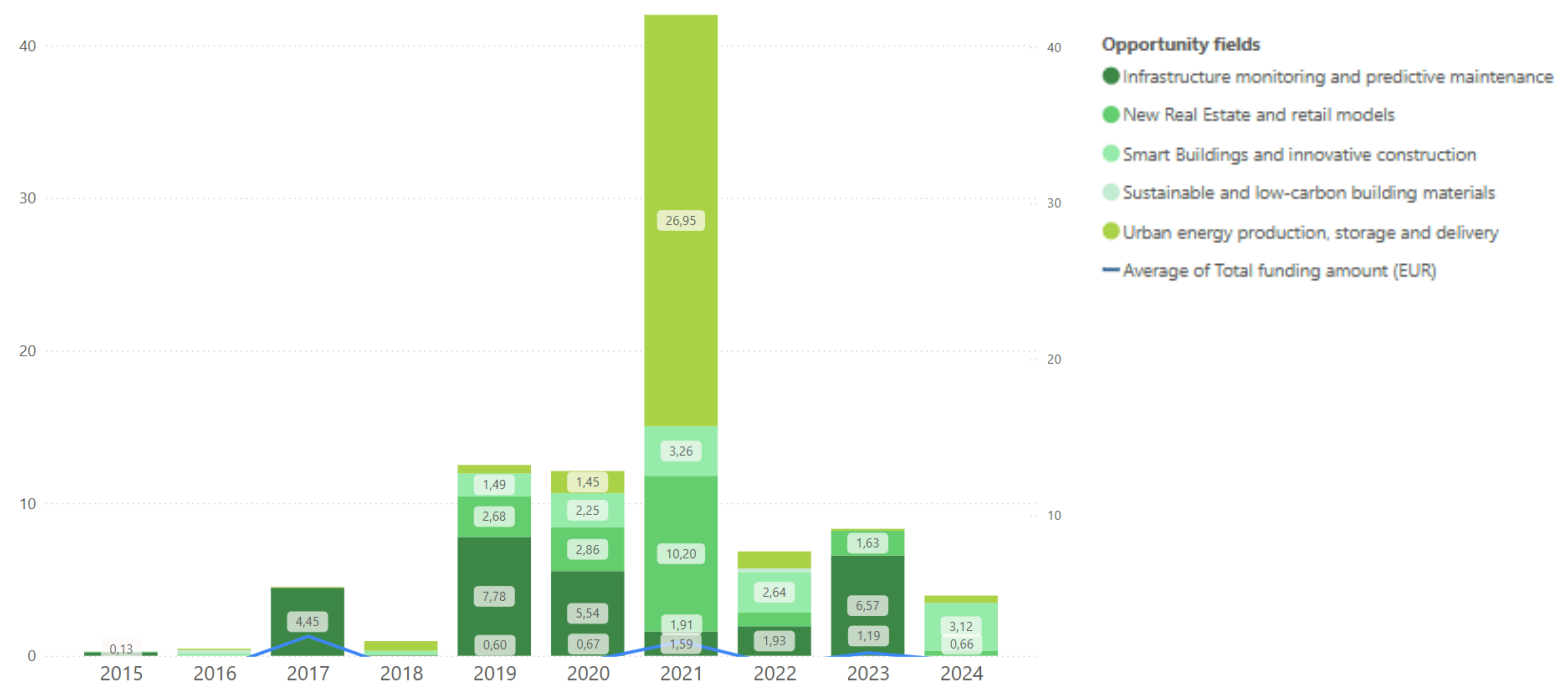
Funded companies:

62 (72% of all infrastructure startups)

Total funding:

88M€ (43% of all urban tech funding)

Funding Waves by Field and Year (in M€)



Note: All funding analyses in this report are limited to companies for which funding data was available.





# Supercharging Infrastructure

## Key Opportunity Fields Trends

### Urban energy production, storage and delivery



26 companies      Funding 31.4M€

Hardware, software and services for EV charging, battery storage and local-renewable micro-grids.

- Largest cheques in the dataset validate export potential.
- National subsidy schemes de-risk early deployments, luring foreign strategics into minority stakes.
- Next hurdle: coordinating grid upgrades as charger density surges.

### Infrastructure monitoring and predictive maintenance



12 companies      Funding 20.8M€

AI-enabled sensors that watch bridges, rails or power lines and predict failures before they happen.

- High ARR / low churn business makes the category popular with growth investors.
- Customers are infrastructure operators with long, sticky contracts.
- New EU resilience directives are nudging asset owners to adopt tech faster.
- Upside: data resale and cross-asset analytics once networks scale nationally.

### Sustainable and low-carbon building materials



5 companies      Funding 0.5M€

Bio-based panels, low-clinker cements and other materials that cut embodied carbon.

- Still R&D-heavy; demo plants need €10 m+0 -beyond most domestic VCs today.
- Corporates in construction are likely lead investors once pilots prove standards compliance.
- CO<sub>2</sub>-pricing in cement could sharply lift demand by 2030.
- IP-protection and certification paths are more critical than marketing at this stage.

### Smart Buildings and innovative construction



22 companies      Funding 13.2M€

IoT, automation and off-site construction that slash energy use and build time.

- Low cash burn and minimal churn suggest high resilience, despite slowdown on the property market.
- Facility management and HVAC giants circle for tuck-in acquisitions.
- Embodied-carbon reporting rules create fresh data-license revenue streams.

### New Real Estate and retail models



21 companies      Funding 21.4M€

Platforms for flexible workspace, pop-up retail or fractional property ownership.

- Funding mid-sized (median 0.6M€) and mainly domestic, reflecting local real-estate expertise.
- Start-ups pivot toward energy-efficiency value propositions to stay relevant.
- Exit path likely through REITs or large developers rather than IPOs.
- Rising interest rates test cashflow resilience, rewarding asset-light operators.







## Supercharging Infrastructure

Case Studies

### 3 examples highlighted in the industry in 2025

#### Innovative Coatings



Steel and zinc coatings that shield rails, bridges and energy hardware corrode too fast, yet switching to exotic alloys drives both cost and CO<sub>2</sub>; globally, corrosion and wear already drain €2.3 trillion a year.

**Coat-it** slips a nanomaterial additive into any standard electro-plating bath, creating a **nanocomposite layer that cuts corrosion rates** by up to 2.5x, trims material use 25% and lowers CO<sub>2</sub> by about 15% – all without changing existing production lines.

That stretches asset life, slashes maintenance budgets and gives cities a low-carbon path to tougher infrastructure.

[coat-it.pl](https://coat-it.pl)

Sustainable and low-carbon building materials

#### Subsurface Data Mining



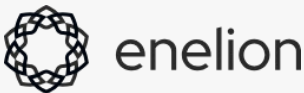
Infrastructure planning and maintenance require precise knowledge of what lies beneath our cities—yet traditional ground-penetrating radar (GPR) often delivers limited accuracy and slow results. Reliable subsurface data is essential for utility management, construction, and emergency response, directly impacting safety and efficiency.

**WIDMO Spectral Technologies** has developed a broadband spectral GPR system that significantly improves the resolution and speed of **underground mapping**. By providing faster, more accurate subsurface profiles, WIDMO helps cities and geological teams make better decisions during infrastructure projects, reduce risk, and plan more effectively in complex urban environments.

[widmo.tech](https://widmo.tech)

Infrastructure monitoring and predictive maintenance

#### Modular EV Charging



EV sales in Poland are climbing quickly, but apartment blocks and small commercial sites still hesitate to add chargers: installation takes weeks, grid capacity is limited and each new model seems to need its own hardware. The result is patchy, slow-charging infrastructure that discourages wider adoption.

**Enelion** offers a **smart and flexible family of EV chargers** that are quick to install—taking just around 15 minutes. Their “3-in-1” design can be mounted on a wall, pole, or pedestal, and each unit delivers fast charging from 1.4 to 22 kW. Up to 30 chargers can connect wirelessly and automatically manage power when the building’s capacity is limited. An optional module adds remote control, scheduling, and energy balancing via a mobile app.

Building owners therefore add capacity incrementally, without grid upgrades, while drivers get reliable, faster top-ups – all at a fraction of the cost and disruption of traditional installs.

[enelion.com](https://enelion.com)

Urban energy production, storage and delivery



THEME C

# Closing Loops.

Managing critical urban resources like food, water, air, soil, nature and biodiversity with resource-efficient and circular principals to create a sustainable, zero-waste city.

- C1



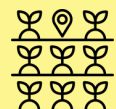
**Zero-waste and circularity**

Designing out waste and keeping resources in use across the urban economy.
- C2



**Water leakage detection and management**

Securing water systems through smart monitoring and conservation.
- C3



**Urban food production**

Localizing food systems to boost sustainability, resilience, and community access.
- C4



**Air pollution monitoring and prevention**

Tackling urban air quality with data and actionable interventions.
- C5



**Biodiversity and green spaces**

Strengthening ecosystems and livability through nature-positive urban design.



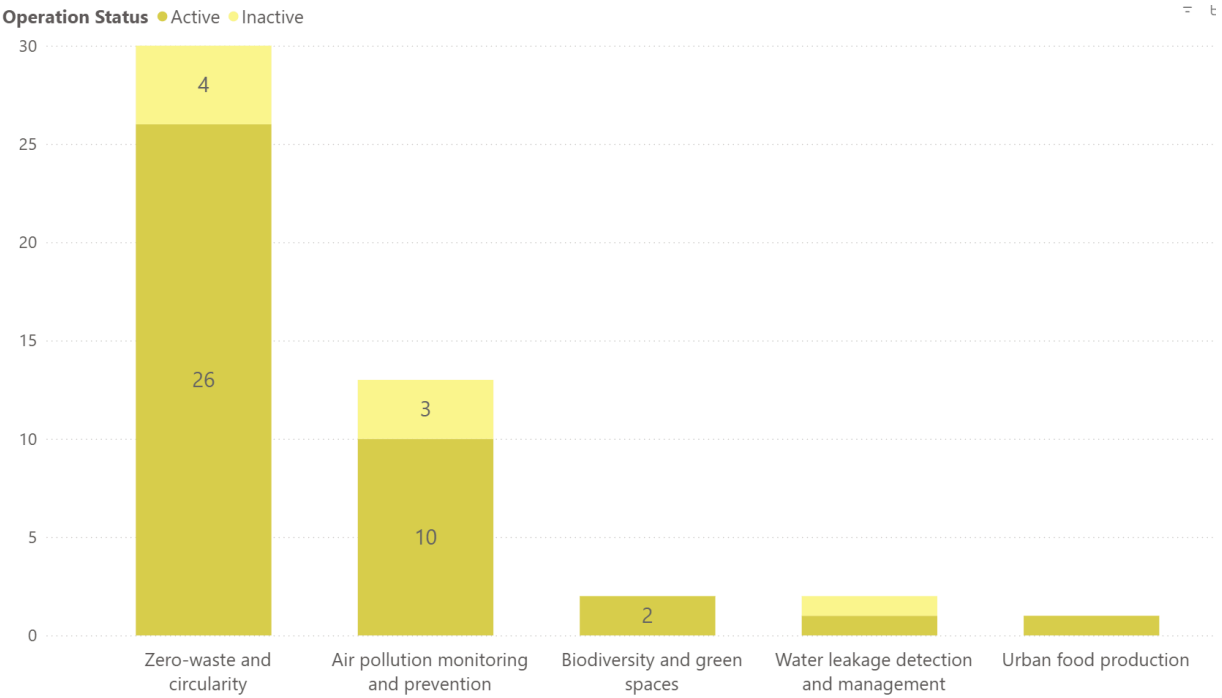


# Key Trends

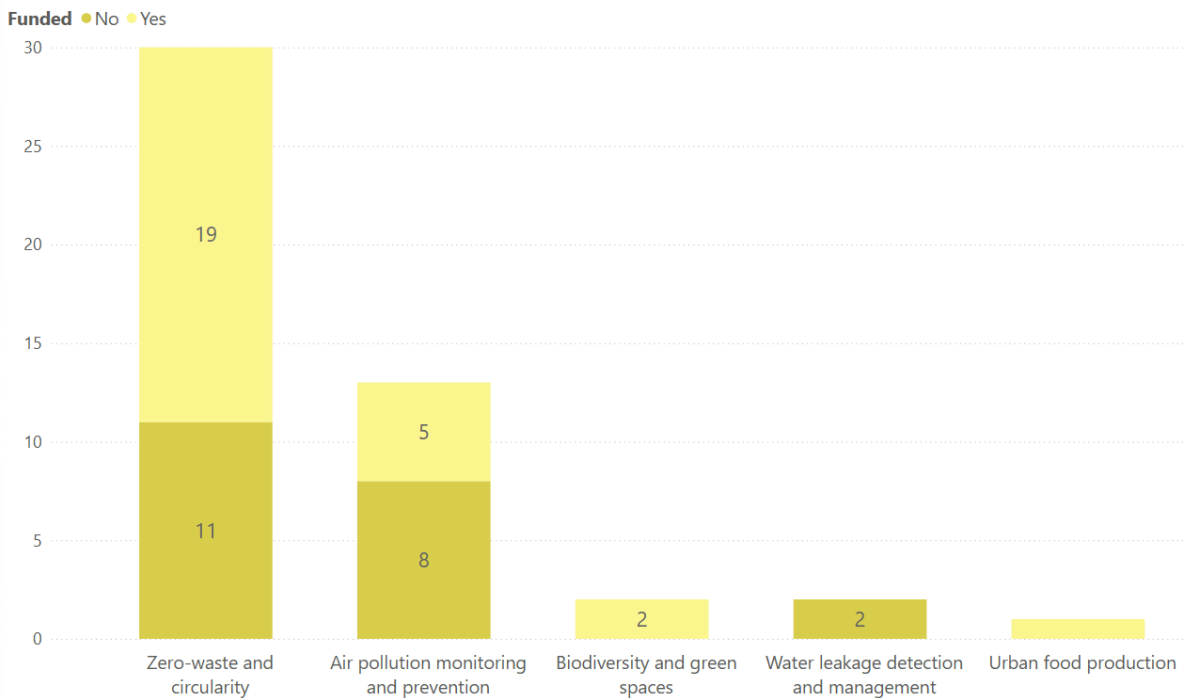
## No Longer Niche: Closing Loops Gains Ground

- While smaller in size, this theme captures a disproportionately large share of funding.
- Solutions targeting air quality, waste, and circular systems align closely with emerging environmental policy and regulation.
- Investors tend to make fewer but larger bets here, signaling belief in the long-term impact and need for infrastructure-heavy models.
- Foreign climate investors are scouting Poland. Nordic and French cleantech funds have started co-leading rounds, signalling growing international confidence in local science-based IP.
- Next hurdle: capital for full-scale plants. Founder attention is shifting from R&D to financing infrastructure heavy roll-outs.

Company Count by Activity Status Across Fields



How Many Got Funded? Company Breakdown by Field



## Key numbers

2015–2024

Total closing loops companies:

**48** (21% of all urban tech companies)

Still active:

**40** (83% of all closing loops startups)

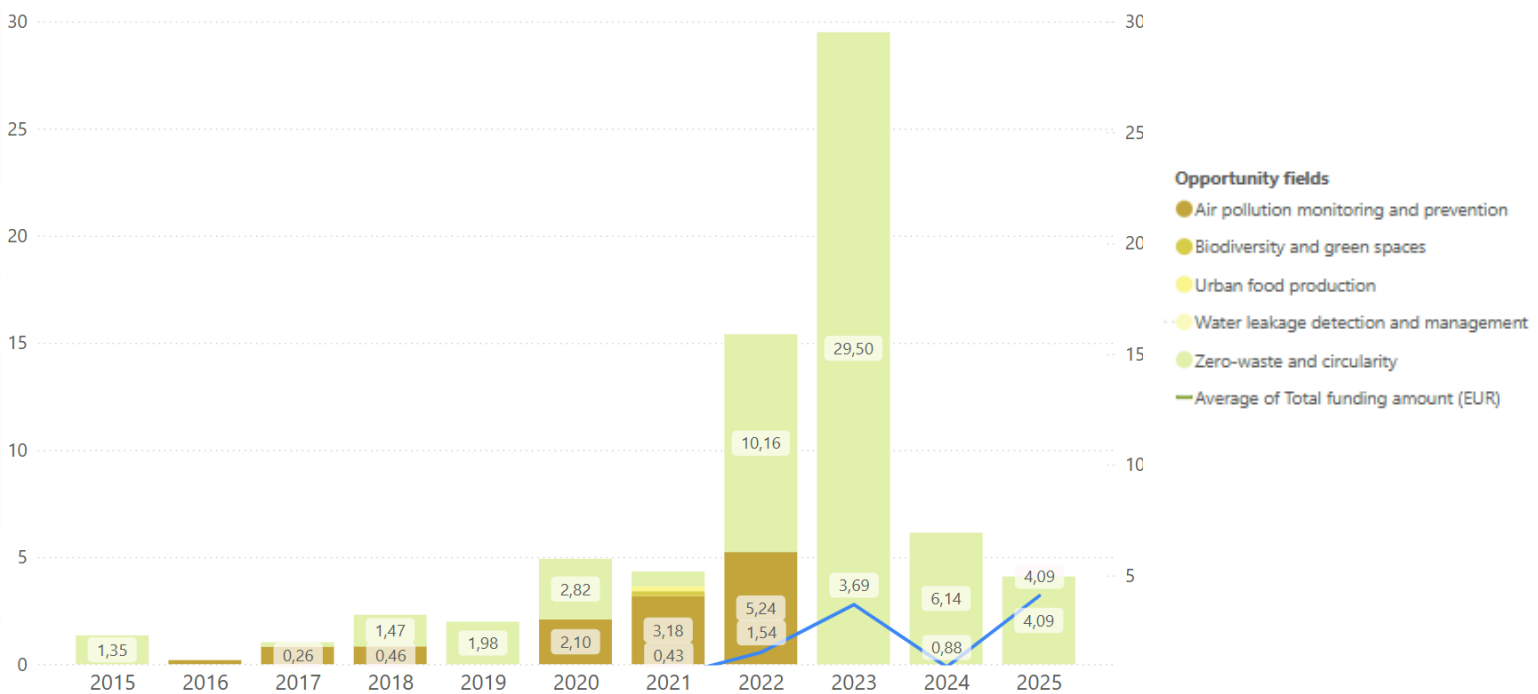
Funded companies:

**30** (63% of all closing loops startups)

Total funding:

**73M€** (36% of all urban tech funding)

Funding Waves by Field and Year (in M€)



Note: All funding analyses in this report are limited to companies for which funding data was available.



 Closing Loops

Key Opportunity Fields Trends

**Zero-waste and circularity**

30 companies      Funding 59.2M€

*Tech that turns waste into new resources, from plastics up-cycling to waste-to-energy.*

- Biggest cash magnet of the theme; three 5M+€ rounds show scaling appetite.
- Business model shifts from grant-funded pilots to revenue contracts with FMCG brands.
- Foreign climate funds co-leading rounds validate global relevance.
- Scale plants (>10M€ cap-ex) still need blended finance to take off.



**Water leakage detection and management**

2 companies      Funding 0€

*Sensors and analytics that cut water loss in ageing municipal networks.*

- No venture rounds yet; utilities’ slow procurement stalls uptake.
- EU water-stress directives create a regulatory spur—pilots expected 2025–26.
- Low-power NB-IoT networks finally enable cost-effective roll-outs.
- Potential public-private funding via resilience or climate-adaptation grants.

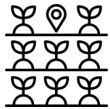


**Urban food production**

1 companies      Funding 0.2M€

*Vertical farms, rooftop greenhouses and controlled-environment agriculture inside cities.*

- Only one vertical farm start-up, bootstrapped via agri grants.
- High energy costs and tight margins deter VC, but waste heat co-location can fix economics.
- City tenders for school meal supply could spark demand.
- Carbon-negative produce claims may unlock corporate offset budgets.

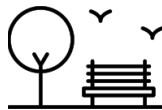


**Air pollution monitoring and prevention**

12 companies      Funding 12.4M€

*Low-cost sensors plus data platforms that map, predict and mitigate urban air pollution.*

- Recurring data-licence fees keep ventures cash-flow positive.
- ESG reporting and insurance pricing create new customer segments.
- Export ratio already > 50 % – Poland is a launch pad to Balkans and Baltics.



**Biodiversity and green spaces**

2 companies      Funding 1.16M€

*Tools that map, restore or maintain urban greenery and habitat corridors.*

- Early-stage drone/LiDAR mapping firms rely on EU nature-restoration grants.
- Municipal demand still nascent but will grow under 2030 biodiversity targets.
- Corporate real-estate owners seek biodiversity credits – possible B2B market.
- Combining carbon and biodiversity data could unlock blended-finance deals.





Note: All funding analyses in this report are limited to companies for which funding data was available.





Closing Loops

Case Studies

3 examples highlighted in the industry in 2025

Circular Materials



Zero-waste and circularity challenge cities to shift away from linear, fossil-based systems toward regenerative models where materials are reused or returned to nature. Yet, most urban industries—from packaging to fashion—still depend on polluting, resource-intensive inputs.

**MakeGrowLab** is changing that by growing bio-based materials that replace plastics and other fossil-derived products in packaging, textiles, and more. Inspired by the symbiotic cycles of nature, the company fuses science and design to create locally produced, fully circular materials that not only eliminate waste but contribute positively to the environment.

[makegrowlab.com](https://makegrowlab.com)

Zero waste and circularity

Clean air



Urban Poles spend ~ 80 % of their time indoors, yet many workplaces and public venues still breathe air laced with VOCs, fine dust and bio-pollutants. Conventional HVAC upgrades are expensive and invisible, so awareness—and action—stay low even though air-quality-related illnesses kill an estimated 6.5 million people globally each year.

Warsaw-based **Whiff.zone** creates “clean-air zones” by blending high-resolution pollution sensing with data-driven planting design. Tiny IoT sensors map hotspots inside or outside a building; the platform then prescribes and installs specific air-filtering plants, monitors performance and maintains the greenery. Because it reuses existing space and leverages the natural filtering power of plants, Whiff delivers visible, low-energy air-quality improvements while giving companies a tangible ESG and branding win.

[whiff.zone](https://whiff.zone)

Air pollution monitoring and prevention

Food waste



Zero-waste and circularity in cities also means tackling waste in the food supply chain—especially post-harvest losses that often occur before produce reaches consumers.

Fresh Inset, under the brand **Vidre**, offers a simple but powerful solution: 1-MCP stickers that release a molecule to slow down ripening by blocking ethylene, the hormone responsible for fruit aging. Used by farmers, distributors, and retailers, **these stickers help extend shelf life**, reduce spoilage, and cut food waste—without the need for expensive cold storage or chemical treatments.

It's a scalable tool for building more efficient and sustainable food systems.

[freshinset.com](https://freshinset.com)

Zero waste and circularity



THEME D

# Boosting Livability.

Creating effective urban governance by getting citizens and governments to better work together and to build safe, inclusive and resilient communities in times of a rapidly changing climate and world.

- D1



**Public participation and new governance models**

Empowering communities in shaping the future of their cities.
- D2



**Data-enabled urban planning and public services**

Leveraging data to design smarter, more inclusive public systems.
- D3



**Climate adaptation and resilience**

Preparing cities to withstand climate risks and recover faster.
- D4



**Public safety and emergency response**

Enhancing urban readiness and protection through innovation.
- D5



**Accessibility and social inclusion**

Ensuring that cities work for everyone, regardless of ability or background.





# Key Trends

## People-Focused, Capital-Light

- Quietly resilient. Public-space analytics and health-safety apps raise the smallest sums, yet they fail far less often thanks to lean SaaS models.
- These are typically high-impact but low-margin sectors, often underrepresented in VC portfolios.
- Despite limited access to capital, the majority of companies remain active, suggesting strong public value and founder commitment.
- The theme is mission-driven and socially relevant, though it faces structural challenges in scaling commercially.
- It remains essential for building equitable and responsive urban systems.

Company Count by Activity Status Across Fields



How Many Got Funded? Company Breakdown by Field



## Key numbers

2015–2024

Total boosting livability companies:

35 (15% of all Urban Tech companies)

Still active:

30 (86% of all boosting livability startups)

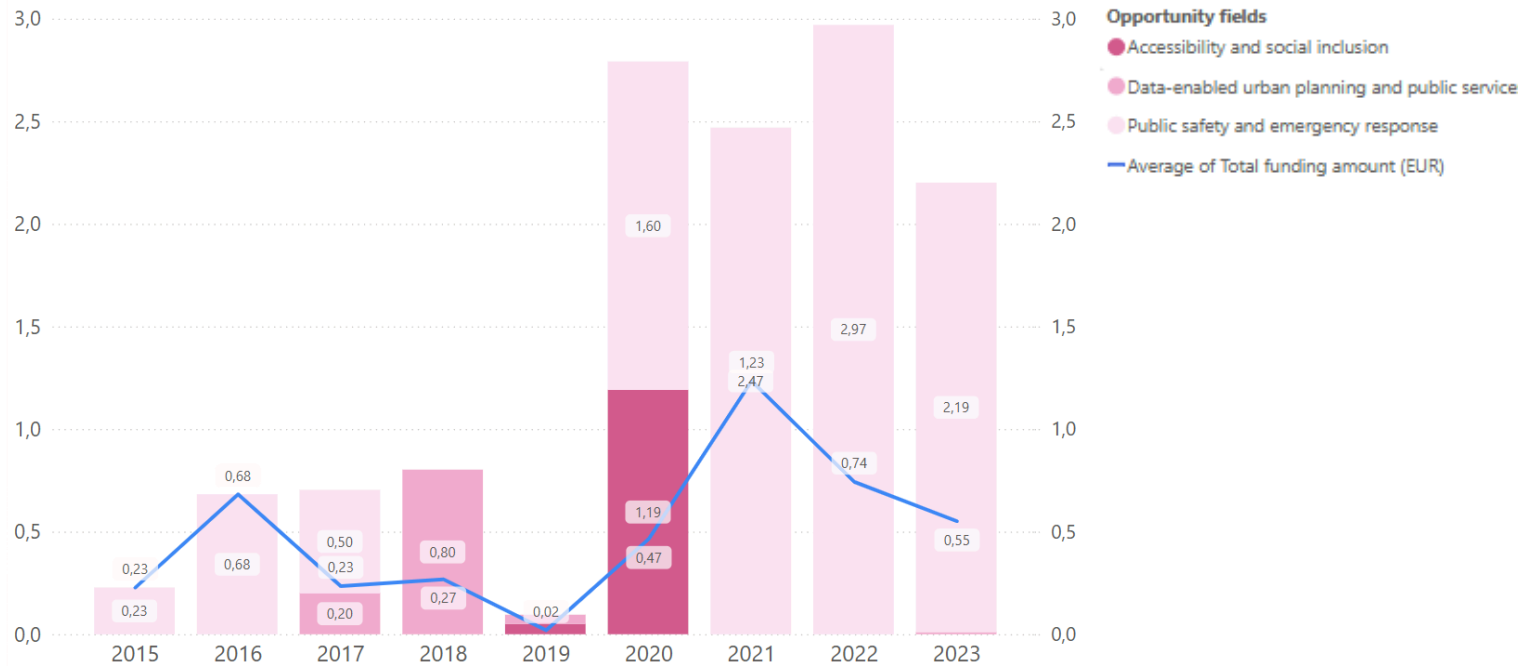
Funded companies:

17 (49% of all boosting livability startups)

Total funding:

15M€ (7% of all urbantech funding)

Funding Waves by Field and Year (in M€)



Note: All funding analyses in this report are limited to companies for which funding data was available.



 Boosting Livability

Key Opportunity Fields Trends

Public participation and new governance models

7 companies      Funding 0€



Digital tools that foster civic engagement, transparency, and participatory decision-making.

- Still grant-funded; no VC rounds yet due to unclear monetisation.
- SaaS pilots popular with mid-size cities looking for low-cost engagement tools.
- Integrating with e-ID and payment rails would unlock premium tiers.
- Potential revenue from analytics sold to utilities and developers.

Data-enabled urban planning and public services

12 companies      Funding 1.2M€



Using data to optimize urban management and service delivery.

- Small but consistent flow of sub-€200 k rounds, often EU-fund backed.
- Slow procurement cycles push many founders to bootstrap.
- Cross-selling land-use, mobility and energy layers boosts ticket size.
- As ESG reporting gets stricter, private-sector demand could surpass municipal.

Climate adaptation and resilience

0 companies      Funding 0€



Technologies that help cities respond to climate risks like heatwaves or flooding.

- **White-space:** no dedicated Polish start-ups yet despite escalating flood risk.
- Huge grant pool (EU Horizon Europe, insurance innovation) waiting to be tapped.
- Spin-outs from research institutes present near-term opportunity.
- First-mover advantage for founders pairing hydrology or heat-model IP with SaaS delivery.

Public safety and emergency response

11 companies      Funding 10.8M€



Enhancing city safety, crisis readiness, and emergency response systems.

- Two 3-4M€ growth rounds show buyers will pay for proven tech.
- Bundling situational awareness software with 5G “network slices” is next frontier.
- Cross-sector sales (transport, energy) smooth revenue seasonality.

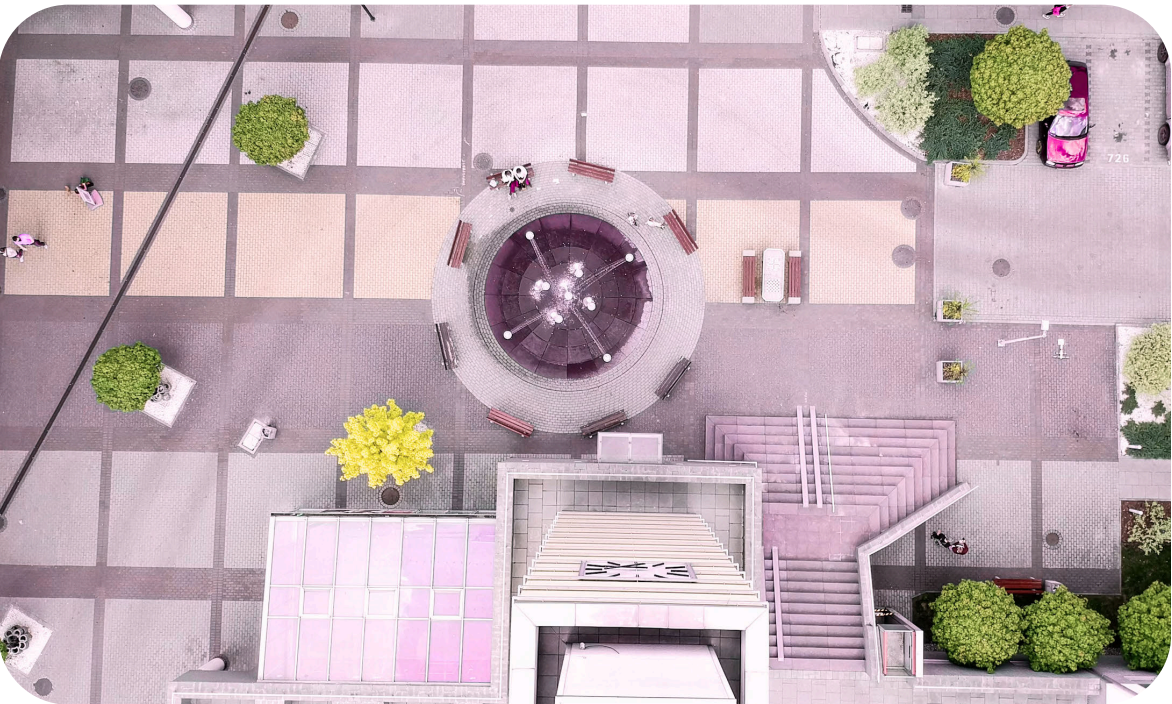
Accessibility and social inclusion

5 companies      Funding 1.2M€



Improving equitable access to public spaces, services, and mobility for all urban residents.

- Impact investors supply most capital; grants cover early R&D.
- AI voice- and gesture-recognition advances cut tech cost barriers.
- Growing ESG pressure on transport operators could speed enterprise adoption.



Note: All funding analyses in this report are limited to companies for which funding data was available.





## Boosting Livability

### Case Studies

### 3 examples highlighted in the industry in 2025

#### Accessibility and Social Inclusion



Accessibility and social inclusion are vital components of urban livability, ensuring that all residents—regardless of ability—can navigate public spaces, access services, and participate fully in city life. Yet, physical and architectural barriers still limit mobility and independence for many people with disabilities.

**MeWheel** addresses this gap with an **attachable mobility device for wheelchairs** that helps users overcome common urban obstacles. By enhancing everyday accessibility, MeWheel empowers individuals to move more freely, boosting independence, social participation, and access to employment. The solution also supports healthcare providers, rehabilitation centers, and disability-focused organizations working toward more inclusive urban environments.

[mewheel.com](https://mewheel.com)

Accessibility and social inclusion

#### Animal bonds



Social inclusion in urban environments goes beyond human-centered services—it also means creating compassionate, connected communities where all residents, including animals, are cared for. Losing a pet can be distressing, and overloaded shelters struggle to manage the volume of lost animals, often with limited tools.

**MyPetBack** is an AI-powered platform that matches photos of lost and found animals, working in real time with animal shelters to keep databases up to date. The app fosters a **community-driven approach to pet recovery**, reducing shelter costs and emotional stress for pet owners. With plans to introduce Ukrainian and English language versions, the platform is also expanding its reach to displaced communities, including those affected by war.

MyPetBack shows how digital tools can strengthen social bonds, support inclusion, and ease public service burdens through community engagement and innovation.

[mypetback.com](https://mypetback.com)

Accessibility and social inclusion

#### Public safety



As cities grow more connected and aerial mobility increases, public safety must adapt to emerging threats—particularly from unauthorized drones near sensitive infrastructure or crowded public spaces.

**APS (Advanced Protection Systems)** develops advanced **airspace security** solutions using proprietary radar systems, AI-driven analytics, and electronic countermeasures to detect and neutralize aerial threats in real time. Their technologies are already deployed around power plants, critical infrastructure, and public venues, **providing automated situational awareness and rapid response capabilities**.

APS helps cities and institutions protect people and assets, ensuring that innovation in urban airspace does not come at the cost of safety. Their systems are designed to be scalable and adaptable, making them well-suited for the evolving needs of urban environments.

[apsystems.tech](https://apsystems.tech)

Public safety and emergency response



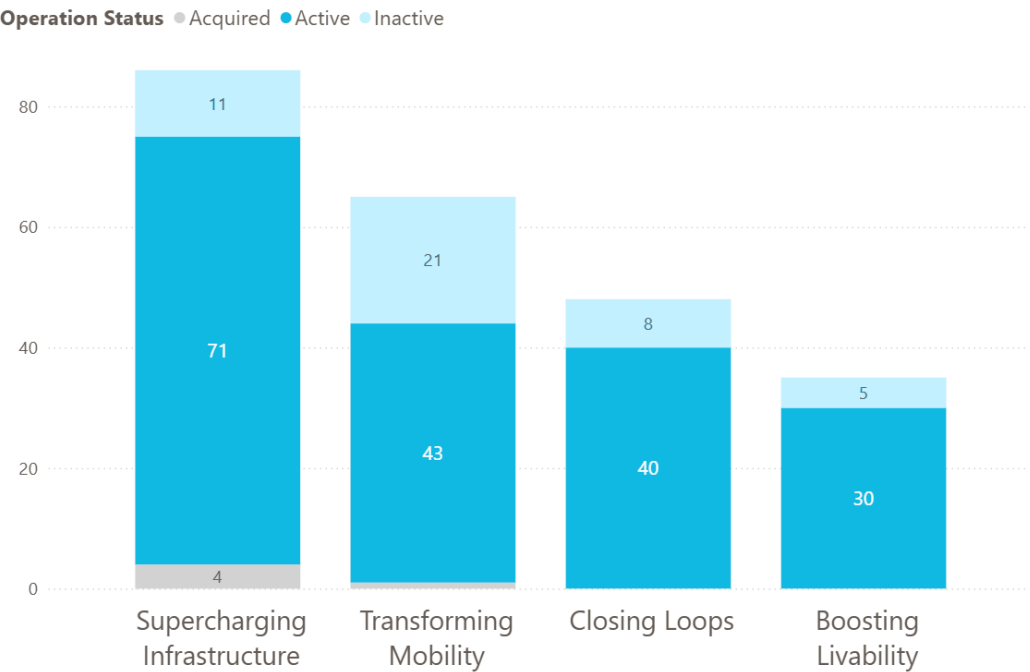
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# Ecosystem Take-Aways

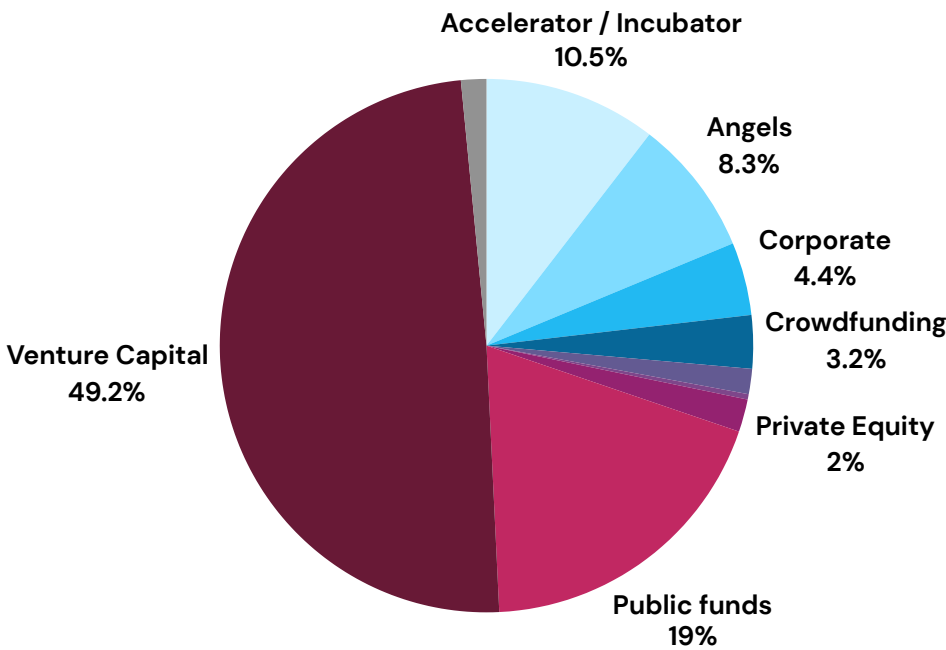


# Ecosystem at a glance

Still Active or Closed? Company Count per Theme



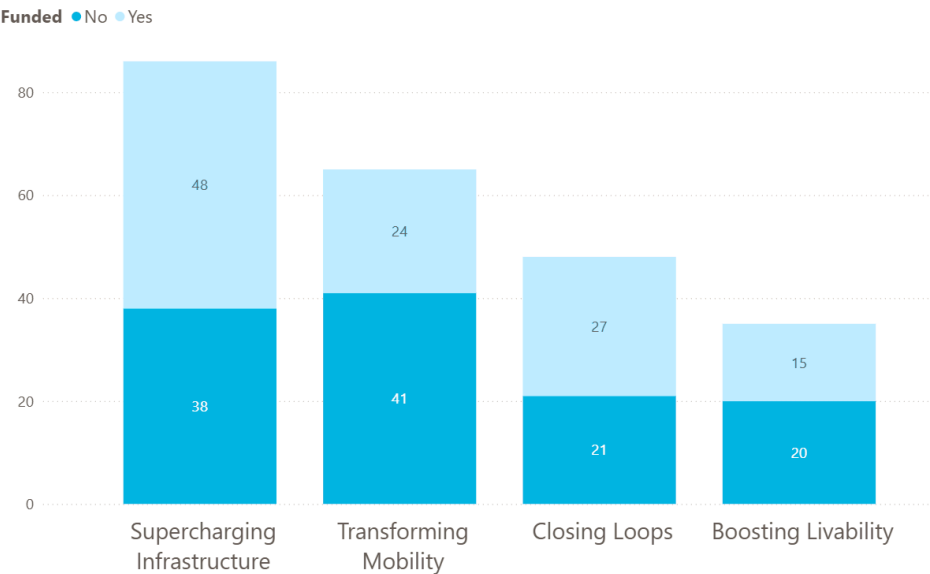
Where is the Money coming from? (approximate share)



**Foreign strategics write the biggest cheques, local VCs dominate the long tail fuelled by public LP money.**

- Roughly 98 investors appear in the data: two-thirds Polish seed funds or angels, one-third regional/EU climate VCs and corporates.
- Many private VCs in Poland still receive a large portion of their LP capital from Public FoF sources.
- All late-stage rounds involve Western-European utilities, OEMs or logistics groups, signalling Poland’s startups are export-ready but still rely on cross-border syndication.

How Many Got Funded? Company Count by Theme



**Survival is high for a hardware-rich sector.**

- 184 of 234 companies (≈ 79 %) are still active or exited – well above typical deep-tech averages.
- Hardware players benefit from public-procurement pull, while software-heavy prop-tech enjoys low burn and steady SaaS renewals.

**Policy remains the single biggest growth lever.**

- Funding spikes coincide almost perfectly with EU Renovation-Wave grants, clean-transport deadlines and waste-diversion targets.
- Companies that align with these mandates secure cash, and customers, faster than pure market-pull plays.

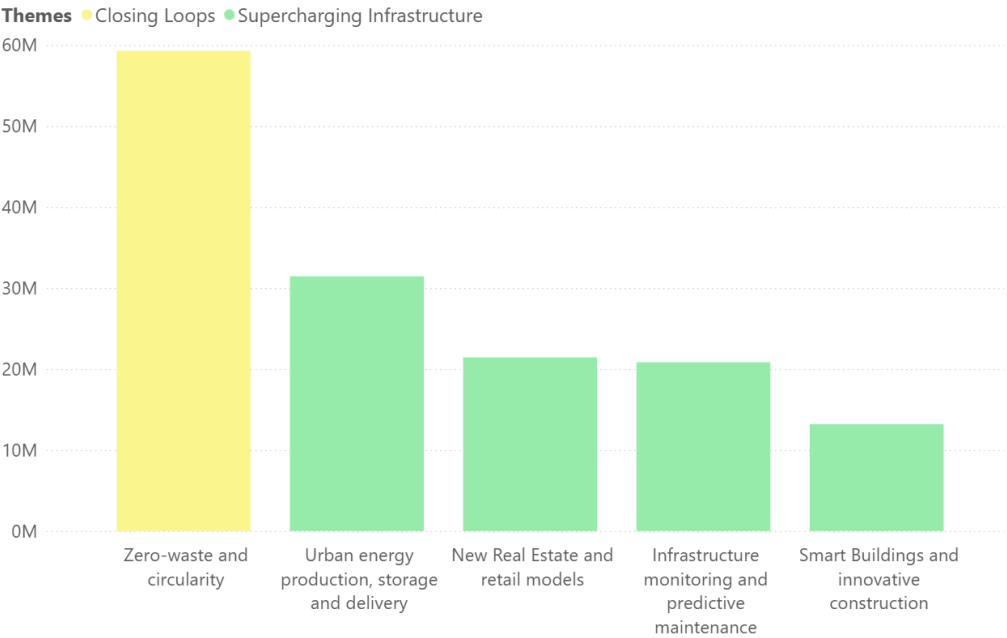
**Next frontiers: bigger growth funds and blended finance.**

- Bridging the 15–30M€ cheque gap, especially for cap-ex-heavy energy and circularity projects, will decide whether Polish scale-ups stay headquartered locally or shift to Berlin, London or the Nordics for capital and talent.



# Ecosystem at a glance

Where the Money Goes: Top 5 Opportunity Fields for Investors



Three opportunity fields attract two-thirds of the euros.

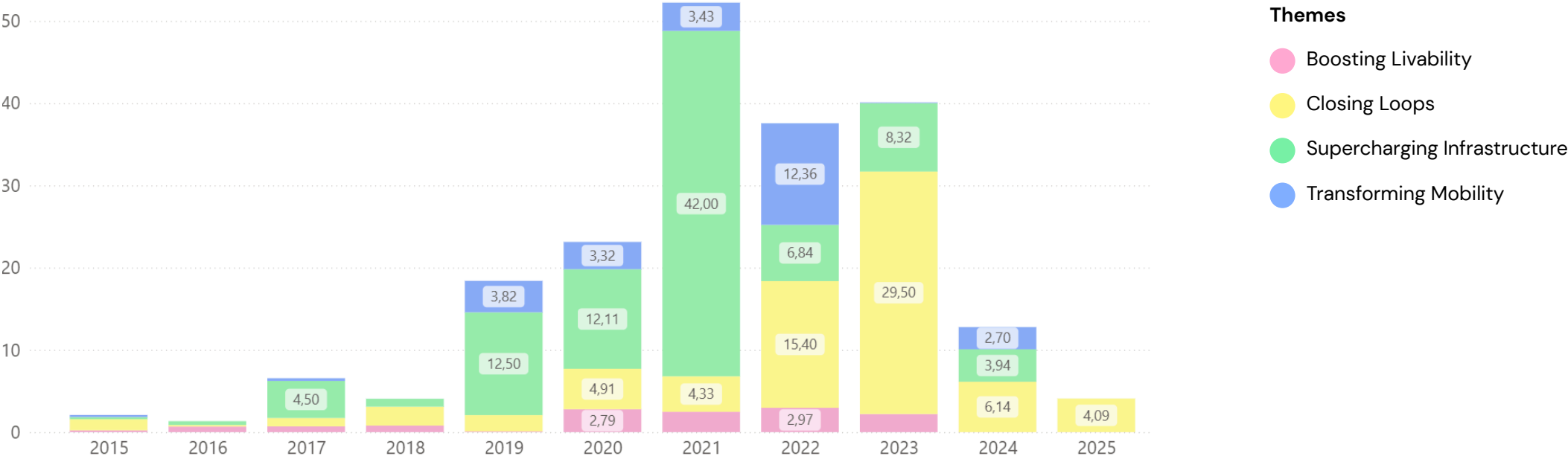
- Urban energy production, storage & delivery – charger hardware and BESS integrators ride subsidy waves and export demand.
- Zero-waste & circularity – waste-to-resource plants win contracts from FMCG brands and cities.
- Infrastructure monitoring & predictive maintenance – AI sensors lock in long-term utility/rail concessions.

Each is powered by tight regulation (Fit-for-55, landfill bans) plus clear revenue contracts, making them magnets for both corporate and climate-tech capital.

Mobility is crowded but brittle; white-spaces remain elsewhere.

- Shared micro-mobility and last-mile ventures make up 28% of companies yet absorb <7% of funding, with survival at just 67%.
- In contrast, entire fields such as Climate adaptation & resilience and Water-leakage management show zero VC activity – prime ground for first movers as flooding, heatwaves and water stress intensify.

When and Where Money Went: Funding Trends by Theme



Capital is abundant at the start, scarce at scale.

- Disclosed funding climbed from <5M€ in 2015 to ~50M€/yr by 2021, then plateaued.
- The median ticket is just 0.23M€, and every round above 10M€ is foreign-led – evidence of a healthy seed funnel but a clear “Series-B gap” once firms look for growth money.

Note: All funding analyses in this report are limited to companies for which funding data was available.



# Investors' voices



 **vcleaders**

**Paweł Michalski**  
CEO & Co-founder, VCLeaders

“

Poland’s urban tech sector lags behind the US and major EU hubs mainly due to slow municipal adoption and procurement that favors incumbents. We import smart mobility platforms more often than we develop our own, leaving local supply thin. The growth of robotics and AI could change this pattern – if the public sector acts as an early adopter. urban tech founders may want to prioritize ‘dual-use’ applications, that serve both government and commercial markets.



**EURAZEO**

**Karolina Wojtas**  
Venture Partner, Eurazeo

“

We observe Poland’s strong presence as a local hub for smart city startups, with the majority of ventures concentrated in infrastructure, construction, mobility and industrial-grade solutions. We have also identified a number of CEE players expanding or planning to expand into Poland with their products and services. This demonstrates the market’s capacity to adopt new technologies and highlights its appeal to CEE founders.



 **THE BAU VENTURES**

**Dominik Zalewski**  
Venture Investor, The Bau Ventures

“

The Polish urban tech market is experiencing strong momentum – driven by municipal and governmental smart city programs, and by startups’ growing interest and activity of ambitious founders in topics like prop tech, con tech and energy. Poland’s ‘old economy’ is also increasingly curious and open to disruptive and novel technologies.



**Inno**

**Andrzej Serwicki,**  
Investment Director, InnoEnergy

“

Poland’s urban tech sector is expanding rapidly, driven by talent, investor interest, and demand for sustainable solutions. With most of the population in cities, innovation is essential. At InnoEnergy, we see Poland as a key European hub for scaling urban tech with strong talent, EU support, and global reach.

# B2G Market Dynamics in Poland

## → Solution Areas in Demand

- Polish municipalities are prioritizing intelligent transport systems, such as GPS-equipped buses and real-time dispatch tools.
- Street lighting modernization projects are widespread, often replacing thousands of lamps with energy-efficient LEDs.
- Air quality monitoring networks are being deployed citywide, especially in cities facing high pollution levels like Warsaw and Kraków.
- Cities are investing in digital services including cloud-based ticketing, open data platforms, and e-payment systems.
- Environmental and climate-oriented solutions like water management, clean energy, and smart waste systems are gaining traction.

## → Procurement Mechanisms

- Most projects are still acquired through standard open tenders, especially for infrastructure-heavy systems.
- GovTech Poland enables challenge-based procurements, letting cities contract startup solutions via open contests.
- Innovation partnerships and pre-commercial procurement (PCP) are increasingly used for developing new mobility and climate tech.
- Some projects use design contests or competitive dialogues to find creative, adaptable solutions.
- Public-private partnerships (PPPs) are applied in specific sectors like smart building retrofits and lighting upgrades.

## → Supplier Landscape

- Large integrators like GMV and Asseco are common suppliers for complex systems such as ITS and digital ticketing.
- Startups and SMEs are increasingly entering public contracts via streamlined processes like GovTech challenges.
- National programs encourage the inclusion of micro-enterprises and citizen-led teams in innovation procurement.
- The GovTech model has shown high return on investment, such as a 25x ROI in Świdnik’s waste analytics case.
- Cloud-based software platforms from SMEs are becoming standard for services like civic reporting and payments.

## → City Examples & Use Cases

- Świdnik recovered 120K€ in waste fees through a GovTech-funded analytics tool developed by a local startup.
- Toruń deployed a city-wide ITS upgrade for 115 buses, including GPS and real-time passenger info screens.
- Tychy launched the country’s largest open-loop contactless ticketing system, reducing cash and paper use.
- Warsaw installed 165 IoT-enabled air quality sensors on schools and roads to stream real-time smog data.
- Gdańsk and Kraków are collaborating with startups to deploy city-wide environmental sensor networks.



# Key programs driving urban innovation in Poland

From national schemes to EU initiatives, here are the key programs making it happen.

- FEnIKS (European Funds for Infrastructure, Climate, Environment)**  
  
Poland’s largest EU structural fund program (29.3B€), supporting urban transport, energy, climate adaptation, and waste infrastructure. Covers 70–85% of project costs.  
  
Example: National Library modernization in Warsaw; co-funding for e-buses and low-emission heating in cities.
  
- National Recovery Plan (KPO / RRF)**  
  
59.8B€ for green transition and digitalization, including ~7.5B€ for urban mobility, energy retrofits, and digital public services.  
  
Example: 2023 call awarded 100M€ to mid-sized cities in Eastern Poland for e-mobility and smart ticketing systems.

- GovTech Polska**  
  
National advisory unit within Poland’s Ministry of Digital Affairs. It serves as the strategic driver of Poland’s public-sector innovation, coordinating cross-ministerial efforts to harness creative technology solutions via open, challenge-based procurement, broad participation, and institutional advisory support.  
  
Example: Świdnik’s GovTech contest recovered funds using an analytics tool from a local tech team; Warsaw ran a “Climate Hackathon” under this scheme in the past.
  
- Horizon Europe**  
  
€95.5B EU R&D framework supporting cross-border innovation in climate, mobility, and digital transformation. Cities participate in missions, pilots, and tech development consortia.  
  
Example: Warsaw, Kraków, and others are part of the EU Mission Cities “100 Climate-Neutral Cities by 2030” initiative and receive tailored support via Climate-KIC’s NetZeroCities program.

- LIFE Programme**  
  
EU fund for environmental and climate adaptation pilots. Grants cover up to 60% of costs.  
  
Example: LIFE DREAM CITIES project supports seven Polish cities with NbS for urban resilience (green roofs, rain gardens, adaptation plans).
  
- European Urban Initiative (EUI)**  
  
Supports urban experimentation with grants up to €5M (80% coverage).  
  
Example: Stalowa Wola won funding in 2024 to launch a space-tech innovation hub under EUI’s “Space 4 Talents” project.
  
- Digital Europe Programme**  
  
Funds AI, cybersecurity, and digital capacity-building. Polish cities benefit through hubs like Smart Secure Cities EDIH, which supports municipalities with tech pilots and digital skills.  
  
Example: Projects include Local Digital Twins, mobility data platforms, and cybersecurity frameworks for city services.

# Recommendations

Poland’s urban tech is growing fast but unevenly. To unlock its full potential, stakeholders must co-invest in coordination, focus beyond mobility, and de-risk B2G collaboration – especially in sustainability and livability domains where social return is high but financial return is less immediate.

## → Cities & Policymakers

**What’s missing:** Strategic alignment, city procurement support, cross-sector collaboration.

- Launch targeted public procurement programs for urban tech (esp. in circularity, livability, civic tech).
- Create regulatory sandboxes for testing urban solutions in real-world settings.
- Support cross-city innovation platforms to scale successful pilots nationwide.
- Embed startup collaboration goals into climate, mobility, and infrastructure policies.

## → Urban Activists & NGOs

**What’s missing:** A clear feedback loop that turns grassroots pain-points into startup and municipal briefs

- Establish city “living labs” where residents co-design and test solutions alongside founders.
- Use participatory budgeting to earmark a slice for pilot deployments of climate adaptation, accessibility and safety tools.
- Publish impact scorecards (emissions saved, public-space reclaimed) to steer public opinion – and investor interest – toward high-value fields.

## → Investors

**What’s missing:** Focus beyond hardware-heavy or mobility-centric deals.

- Expand funding toward undercapitalized but growing themes (e.g. Boosting Livability, Closing Loops).
- Back purpose-driven ventures solving systemic urban issues with measurable public value.
- Develop thematic investment vehicles for climate adaptation, urban food systems, and energy resilience.
- Partner with public sector funds (e.g. EU recovery, local green bonds) for blended finance models.

## → Founders

**What’s missing:** Access to cities, B2G go-to-market know-how and patient capital.

- Build coalitions or alliances with other startups to co-deliver city-scale pilots.
- Focus on city readiness and integration – design solutions that plug into urban workflows.
- Explore partnerships with local utilities, infrastructure owners, and NGOs.
- Leverage EU urban missions, Horizon calls, and EIT support for funding and visibility.

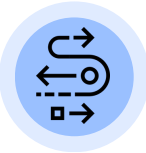
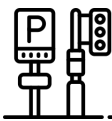
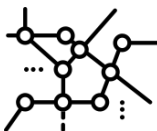
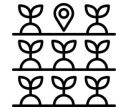


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# Appendix: Urban Tech Taxonomy



# Urban Tech Taxonomy: Within each theme, Urban Impact defined promising opportunity fields with high-impact potential.

|                                                                                                                           |                                                                                                                                                  |                                                                                                                                                         |                                                                                                                                                  |                                                                                                                                                |                                                                                                                                           |
|---------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------|
|  <div>Transforming Mobility</div>        | <div>A1 Shared mobility and new vehicle types</div>             | <div>A2 Robotic and autonomous services</div>                        | <div>A3 Urban logistics and last mile delivery</div>          | <div>A4 Parking solutions and mobility hubs</div>           | <div>A5 Public transport and traffic management</div>  |
|  <div>Supercharging Infrastructure</div> | <div>B1 Urban energy production, storage and delivery</div>    | <div>B2 Infrastructure monitoring and predictive maintenance</div>  | <div>B3 Sustainable and low-carbon building materials</div>  | <div>B4 Smart Buildings and innovative construction</div>  | <div>B5 New Real Estate and retail models</div>       |
|  <div>Closing Loops</div>              | <div>C1 Zero-waste and circularity</div>                      | <div>C2 Water leakage detection and management</div>               | <div>C3 Urban food production</div>                         | <div>C4 Air pollution monitoring and prevention</div>     | <div>C5 Biodiversity and green spaces</div>          |
|  <div>Boosting Livability</div>        | <div>D1 Public participation and new governance models</div>  | <div>D2 Data-enabled urban planning and public services</div>      | <div>D3 Climate adaptation and resilience</div>             | <div>D4 Public safety and emergency response</div>        | <div>D5 Accessibility and social inclusion</div>     |



# Closing

## Thank you!

This report was made possible thanks to the insights, data, and collaboration of urban innovators, founders, researchers, investors and city partners across Poland.

A special thank you to everyone who contributed their time, experience, and data – your work is shaping the future of our cities.



## Missing from the Landscape?

If you are a Polish startup active in the urban tech space and weren't featured — we'd love to hear from you. Reach out and we'll make sure you're included in future updates.

[redakcja@startup.pfr.pl](mailto:redakcja@startup.pfr.pl)

Interested in developing a landscape like this for your region? We welcome your feedback and ideas:

[hello@urbanimpact.agency](mailto:hello@urbanimpact.agency)

 [Visit the interactive startup database](#)

## Disclaimer

This report is based on publicly available information and datasets provided by verified partners as of June 2025. Despite our best efforts, some data may be incomplete or out of date — please contact us with any corrections.

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