WROCŁAW & LOWER SILESIA

STARTUP ECOSYSTEM REPORT

2025

Wroclaw Agglomeration Development Agency

Startup Wroclaw

This report was published by Wroclaw Agglomeration Development Agency (ARAW) and Startup Wroclaw.

Established in 2005, Wroclaw Agglomeration Development Agency (ARAW) is an institution owned by the City of Wrocław and 32 other municipalities. ARAW aims to promote the region, support its economic development, attract foreign investments, and foster a local innovation ecosystem.

Wroclaw Agglomeration Development Agency

www.araw.pl

Startup Wroclaw is an entity owned by ARAW which animates startup environment and integrates the local ecosystem through cooperation with businesses, academia, urban institutions, and incubators.
It organizes events and networking space to promote and support growth of innovation, entrepreneurship and cooperation.

Startup Wroclaw

www.startupwroclaw.pl

This report was researched and authored by Dr. Yash Chawla, Founder of CRAFT and Deputy Head of the Department of Computational Social Science at the Faculty of Management, Wrocław University of Science and Technology, Poland.

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Foreword

Wrocław has always been a city of openness, dynamism, and vibrant energy. Our great ambition is to become one of Europe's leading hubs for technology and innovation.

This is more than a vision, it is our responsibility to future generations and our opportunity to solidify Wrocław's position as a place where world-changing ideas are born.

The key to achieving this ambition lies in cultivating and supporting a thriving startup ecosystem. These young, innovative companies are the engine of our economy, driving growth, attracting top talent, and building our city's competitive edge. They are not merely a part of our economy, they are the very foundation of its future success.

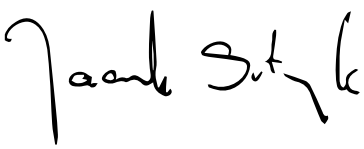
The evidence of this is already clear. Our region of Lower Silesia, with Wrocław at its heart, has twice led Poland in startup registrations, accounting for an impressive 28% of all new startups in the nation in 2023 and maintaining one of the top positions with 20% in 2024. This places us at the center of a broader movement across Central and Eastern Europe, a strong ecosystem of young companies valued at over €200 billion and growing faster than most mature markets. In this landscape, Wroclaw can, and must, be a central hub for "DeepTech innovation", where entrepreneurship, research, and capital converge.

This report has been created to guide and support this journey. It is a tool that provides the knowledge, data, and insights essential for making informed decisions. Think of it as a compass, helping us to invest wisely, focus our energy on pivotal areas, and look to the future with confidence. As the great Stanisław Lem once said, "The future is always a bit surprising," and this report helps us prepare for it.

Together, we can ensure Wrocław is a place where innovation is born and blossoms.

We therefore invite all our partners and stakeholders, entrepreneurs, startups, corporations, universities, investors, and public institutions, to join us in this mission. Only through collaboration can we build a truly powerful innovation ecosystem and secure a brilliant future for Wrocław.

Jacek Sutryk
Mayor of Wrocław



President's Message

When we started our adventure with startups at the Wroclaw Agglomeration Development Agency, we mainly had dreams and ideas about how to support young entrepreneurs.

No one imagined then that these first conversations and initiatives would grow into something so significant - an ecosystem that today brings together over 300 startups and thousands of people who work on bold ideas every single day. This is how the Startup Wroclaw project was born - out of passion, energy, and the belief that Lower Silesia can be a place where innovation not only emerges, but truly has the chance to flourish.

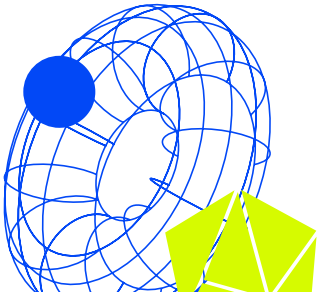
Over the years, we have witnessed how ideas born in university labs, co-working spaces or during informal meetups have evolved into companies that now operate internationally. We have seen how students became founders, how small teams turned into employers of dozens of people, and how investors from abroad started to look at Wrocław as a natural point on the map of European innovation. Each of these stories proves that a strong ecosystem is not built overnight, but step by step, through cooperation, openness and mutual inspiration.

For us, this report is therefore much more than just an analysis of numbers and opinions. It is a living chronicle of emotions, stories and experiences of founders, investors, mentors, universities and accelerators - all those who together create our startup community. It is also clear proof that the real strength of this ecosystem lies in people: in students full of energy, in experts willing to share their knowledge, in local government representatives who understand the importance of innovation, but above all in those who are not afraid to dream big and take risks.

We know that our journey is still ongoing. There are many challenges ahead and many first-time entrepreneurs who are just learning how to navigate this path.

But at the same time, there are more and more doors opening to the world - the result of our joint work and international cooperation.

That is why we look to the future with great optimism, convinced that Lower Silesia can be not only a place where startups are born, but also a space where global success stories are written. This report is another step on that journey. We invite you to read it, to discuss it, and, above all, to become part of it. Because the more of us there are, the stronger, more diverse and more inspiring our ecosystem becomes.



Magdalena Okulowska
President of the Board
Wroclaw Agglomeration Development Agency

Startup Wroclaw Message: the why behind the report

Ten years ago, Wrocław's start-up community was little more than a handful of meetups, a few ambitious founders, and a lot of questions about how to get started.

Since then, the environment has grown, professionalised and become more visible, but until now it has lacked one essential element: a structured overview of what has been achieved and what still lies ahead. Much of our knowledge about the ecosystem was based on anecdotes, impressions and fragmented data. We could see progress, but we did not always know its scale or its direction.

This is why the report was created. It is the first attempt to bring together information about Wrocław's startup scene in a single document. It is both a promotional brochure and a practical tool. On the one hand, it showcases the talent, creativity and resilience of local founders, and presents Wrocław as a place where innovation thrives. On the other hand, it provides useful insights for different stakeholders. Founders can use it to benchmark their progress against others. Investors can identify sectors and teams with potential. Policymakers and institutions can make better decisions about where to focus support and resources.

The report also allows us to recognise the gaps in our ecosystem. It highlights where cooperation is working well, but also where barriers remain. With this knowledge we can be more deliberate in building the conditions for growth, from access to talent and funding to international visibility and connections.

Above all, the report is intended to provide a common point of reference. By collecting and analysing the voices of founders, investors, mentors and institutions, we are able to create a shared picture of reality.

This is only the starting point. The value of the report will not come from the data alone, but from how we use it: as guidance for the next stage of development, as inspiration for collaboration and as confirmation that Wrocław's startup community is ready to scale. The first decade gave us momentum. The next one is about building on that momentum with clarity, purpose and cooperation.

The report is our first collective map of Wrocław's and Lower Silesian's startup landscape - showing where we are, what we have built, and where we need to go next.

Paulina Muszyńska
Head of Startup Wroclaw
Wroclaw Agglomeration Development Agency

For a startup ecosystem to be recognized, it is not only about big exits or large funding rounds – visibility matters just as much. Wrocław and the Lower Silesia region have an ecosystem that is so friendly, full of promising startups and supportive players, that the story often writes itself. We communicate openly and authentically, both within our community and outside, and we are not afraid to be loud on social media. Thanks to this, more and more people across Europe and beyond are discovering Wrocław, Lower Silesia, and our thriving startup scene – and this report will give us an even bigger visibility boost.

Krystyna Kardacz

One of the pillars of any leading innovation center is collaboration with partners. We work with outstanding companies and institutions that understand the challenges entrepreneurs face at every stage of development. Through these relationships, leveraging knowledge, experience and top-quality products and services, we support startups to act faster and more effectively.

Our activities accelerate the exchange of knowledge and experience, provide access to resources, and build credibility and trust, which leads to synergies and cross-innovation, facilitating commercialization and market entry.

Maciej Jacenik

Research and startups are an inseparable duo of innovation. They are united by forward thinking and the desire to create a better world through new solutions. Cooperation with the academic world, and thus the inclusion of a research element in a project, is the key to credibility for startups: access to scientific validation, expert knowledge, laboratories, and fresh research.

This results in robust business models and specialized products that drive the development of the entire innovation ecosystem. The flexibility and agility of this cooperation allows for effective implementation and experimentation, turning science into real market success.

Marta Piksa

Lead researcher and author's message

Crafting this report has been a journey into the heart of our ecosystem. Beyond the data points and trend lines, the most important finding was the consistent, palpable energy of the community itself, a shared ambition to build something of lasting value. This document is, first and foremost, an attempt to give that collective voice a structured narrative.

The primary goal of this research was to move beyond anecdote and provide our community with a common language, a shared, data-driven foundation for strategic dialogue. It was made possible only by the remarkable openness of the hundreds of founders, aspiring entrepreneurs, investors, academics, corporate leaders and policy makers who shared their candid insights. For that, I am deeply grateful. My sincere thanks also go to the Wroclaw Agglomeration Development Agency (ARAW) and especially to the entire Startup Wroclaw team, whose commitment to the ecosystem made this comprehensive study a reality. I would also like to appreciate and thank the young student volunteers studying Organizational Management at Wrocław Tech, who supported me with secondary data collection.

I hope readers see this report not as a final judgment, but as a starting point.

My parents, teachers, and mentors always taught me that the most valuable discussions are the ones that happen after the formal presentation ends. This report is that presentation. Its true value will be measured by the quality of the conversations it ignites and the collaborations it inspires. The data provides a diagnosis, but the community holds the cure.

This is our ecosystem's story, told through data. The next chapter is one we must write together.

Dr. Yash Chawla

Founder of CRAFT
Deputy Head of the Department of Computational Social Science
Faculty of Management

Wrocław University of Science and Technology, Poland

Executive Summary

Wrocław and the Lower Silesian region have successfully built the foundations of a leading European tech hub.

With a vibrant, collaborative community and a world-class talent pipeline, our ecosystem is a regional leader full of dynamism and potential. The data confirms our strengths, but also reveals that we are at a critical inflection point. Having mastered the art of idea generation and community building, our next challenge is to translate this potential into a globally competitive market that creates, scales, and retains high-value companies.

ECOSYSTEM VITAL SIGNS

Overall health score
6.86 / 10

A strong positive rating from all stakeholders, indicating a functional ecosystem with significant growth potential.

Net Promoter Score
+27.28

Significantly more promoters than detractors, reflecting strong stakeholder loyalty and advocacy.

Talent engine
117,600

University students fueling the region's #1 asset: a deep pool of technical and business talent.

Startup capital
of Poland

Consistently ranked as a top region for new startup registrations in the nation.

Our core challenge: The four gaps to bridge

While the ecosystem excels at fostering entrepreneurial interest, an "activation gap" persists, with many potential founders struggling to move from the idea stage to taking concrete action. Once ventures are active, this report identifies four critical, interconnected gaps that must be addressed to unlock our full potential. Solving them is the central mission for the next phase of our growth.

THE COMMERCIALIZATION GAP

We excel at building innovative products but struggle to build businesses around them. Startups' number one challenge is customer acquisition, not technology.

THE SCALE-UP FUNDING GAP

Capital is available at the pre-seed/seed stage, but a severe lack of local Series A+ funding forces our most promising scale--ups to look for capital, and often relocate, elsewhere.

THE ACADEMIA-INDUSTRY GAP

Our universities are a powerhouse of talent and R&D but feel disconnected from the business community. A "valley of death" in funding and a lack of commercial skills hinder the translation of research into market-ready ventures.

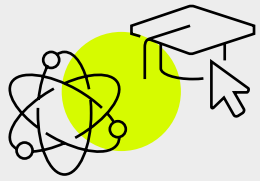
THE CORPORATE INTEGRATION GAP

Startups and corporations both desire collaboration, but partnerships are blocked by corporations' complex internal processes and a lack of dedicated resources for engagement.

Unlocking our potential

To bridge the identified gaps and propel our ecosystem into the top tier of European innovation hubs, a coordinated, multi-stakeholder effort is required. This blueprint, synthesized from the report's data, outlines three core strategic imperatives.

IMPERATIVE 1: MASTER THE BUSINESS OF TECH



The ecosystem's primary skills gap is not technical; it is commercial. We must equip our founders with the business acumen to compete globally.

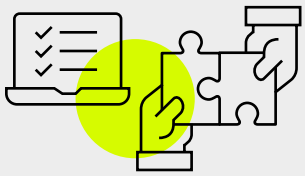
- **For founders:** Prioritize learning advanced sales, data-driven marketing, and go-to-market strategy. Validate your idea with customers before you build.
- **For support network:** Re-orient programs to focus on hands-on business development, sales execution, and financial modeling.
- **For investors:** Make commercialization support a core part of your value-add. Connect your portfolio to their first key clients and mentors with scale-up experience.

IMPERATIVE 2: FUEL THE GROWTH ENGINE

We must create a local capital cycle that can fund companies through their entire lifecycle, from seed to scale.

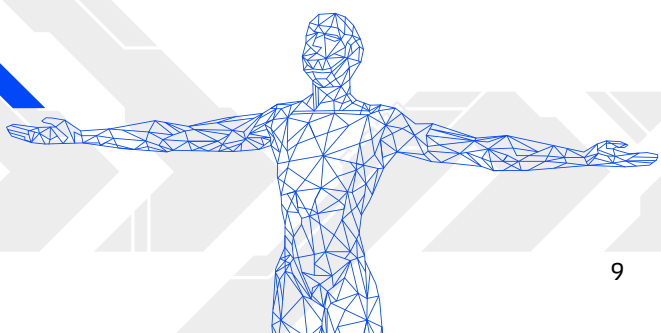
- **For investors:** Act as "super-connectors" by proactively marketing top scale-ups to funds in Warsaw, Berlin, and London. Foster local co-investment syndicates capable of writing the crucial first €1M+ checks.
- **For public sector:** Facilitate investor-only networking and syndication events. Use economic diplomacy to showcase our most promising scale-ups on the international stage.
- **For founders:** Learn the art of fundraising. Build relationships with investors early and prepare data-driven, realistic financial models.

IMPERATIVE 3: FORGE THE "TRIPLE HELIX"



The ecosystem's most powerful engines, Academia, Corporations, and Startups, must move from operating in parallel to deep integration.

- **For academia:** Create a "valorization roundtable" where all universities collaborate with industry to commercialize research. Embed entrepreneurship directly into the curriculum.
- **For corporations:** Establish agile "landing pads" with streamlined processes to manage startup partnerships. Host "reverse pitch" events to signal your innovation needs to the ecosystem.
- **For ecosystem hubs:** Act as the central orchestrator, creating dedicated platforms and events that connect researchers with corporate partners and startups with pilot opportunities.



A snapshot of the key stakeholders

THE FOUNDERS

- **Team structure:** 78% of startups are founded by teams of 2 or more.
- **Experience:** Over 57% of founders have prior entrepreneurial experience.
- **Untapped potential:** A significant gender imbalance persists (approximately 1 female founder for every 15 male founders), representing a major untapped potential for growth and diversity of thought.
- **Top challenge:** Acquiring customers and building a sales pipeline.
- **Top skill gap:** Advanced sales and digital marketing.
- **Origin:** 81.5% of founding teams were already based in Lower Silesia.

THE STARTUPS

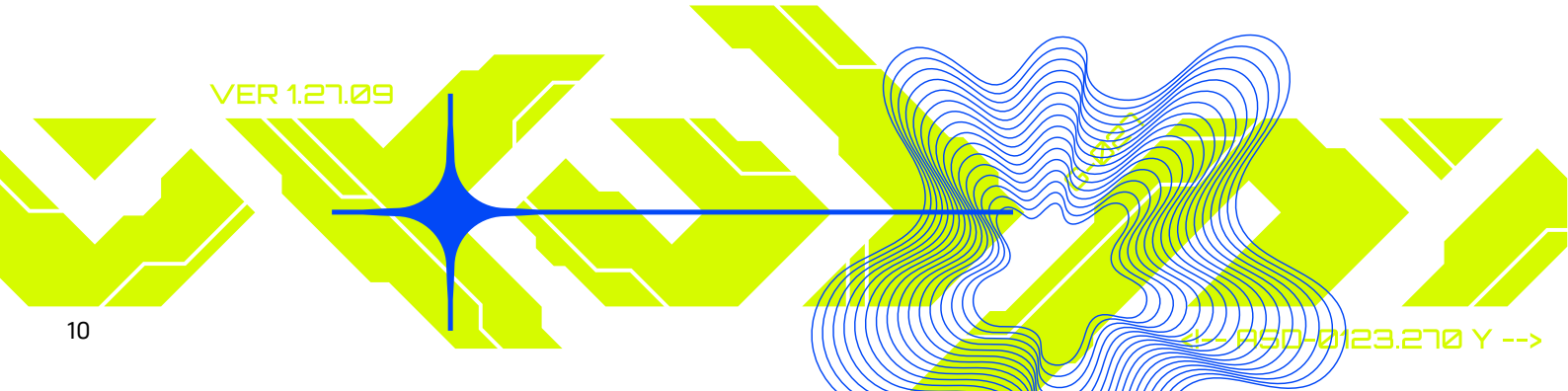
- **Top sector:** Medtech / Healthtech, followed by AI / Machine Learning.
- **Business model:** A strong B2B focus, primarily targeting SMEs.
- **Ambition:** Highly international, with Western Europe and the US as top target markets after Poland.
- **Primary need:** Access to Seed/VC funding and networking opportunities.
- **Revenue status:** 53.8% are pre-revenue or earning less than €5,000/month, reflecting a young ecosystem.

THE INVESTORS

- **Focus:** 83% concentrate on the pre-seed/seed stage.
- **The bottleneck:** A critical lack of local investors leading Series A+ rounds.
- **Future outlook:** 62.5% plan to increase their investment activity in the next 2-3 years.
- **Value-add:** Go far beyond capital, offering mentorship, network access, and fundraising support.
- **Top startup weakness seen:** Unrealistic valuations and insufficient market validation.

THE ECOSYSTEM

- **Community:** Over 550 tech and business events are held annually.
- **Collaboration:** Perceived as strong between Public Support, Academia, and Startups, but weak between Investors and other groups.
- **Academia's role:** The primary engine of talent, producing the most founders and unicorns, but feels disconnected from the ecosystem.
- **Corporate role:** Engaged but hampered by internal bureaucracy; they view startups primarily as partners and suppliers.



Crafting Lower Silesia's deep tech future

Insights on bridging the innovation gap from Dr. Michiel Scheffer, President of the European Innovation Council (EIC) Board

Interview and article by Dr. Yash Chawla.

In an era defined by a fierce global technology race, Europe is carving out its own path.

It is a path that seeks not only to compete with the giants of the US and China but to do so on its own terms, fostering innovation that is both technologically profound and fundamentally humane. To understand this vision, we had a candid conversation with Dr. Michiel Scheffer, in an exclusive interview on September 19, 2025. With a unique background spanning the "triple helix" of academia, entrepreneurship, and politics, Dr. Scheffer offers a panoramic view of the continent's innovation landscape. His insights provide a critical roadmap for emerging ecosystems like Wrocław and Lower Silesia on their journey to becoming deep tech powerhouses.

THE EIC'S DEEP-TECH CONVICTION: MORE THAN JUST CODE

When the EIC talks about "deep tech", it is not using a vague buzzword. Dr. Scheffer laid out an interesting set of criteria that separates genuine deep tech ventures from the sea of software startups.

This is not just a pending application, but a fully granted patent, which serves as hard proof of novel, defensible technology.

> "We are really deep tech oriented", he emphasized, "and as a proxy, a deep tech must be proven by a successful patent".

Furthermore, the innovation must be intrinsically linked to the founders themselves. *"It should be your deep tech"*, Dr. Scheffer explained, clarifying that the EIC aims to help researchers and entrepreneurs develop their *"own knowledge"* into a company. It is about cultivating homegrown innovation, not simply acquiring technology from a bankruptcy or finding it by the roadside. This deep tech push, shapes the entire EIC portfolio, which now includes around 1,200 companies through either projects, or in equity. The focus is on multidisciplinary teams that connect foundational science with real-world applications.

This fusion of expertise is critical, requiring teams that blend deep technical knowledge with sharp market understanding.

> "The software we have is always in connection with a fundamental understanding of the phenomena", he remarked, offering an example: "We have a relatively good portfolio of companies using AI image recognition and characterization of cancers, but the team is made of people who know what cancer is".

DECONSTRUCTING AN EIC DEEP TECH COMPANY

What does the European Innovation Council look for in a deep tech venture?

Core requirement: A granted patent

The technology must be backed by a granted patent, not just a pending one. This serves as the ultimate proof of innovation.

Multidisciplinary teams

Successful teams combine technical and market expertise. Dr. Scheffer's ideal startup has a CEO, a CTO, and a CFO.

The founder's IP

The technology must originate from the founder's own research and story, often stemming from their PhD work. The EIC does not fund companies built on acquired or third-party tech.

Beyond pure software

Ventures must connect software or AI to a deep understanding of a physical or biological field. Examples include:

- AI and medicine (e.g., oncology)
- Aerospace and hydrogen/Electric propulsion
- Chemistry and advanced materials

EUROPE'S STRATEGIC NICHE: THE POWER OF THE VALUE CHAIN

The world chases unicorns, but Dr. Scheffer shared a more nuanced European strategy.

This is not a weakness, but a different strategic focus. European startups are often more deeply integrated into regional and continental value chains. They excel at becoming indispensable leaders in a specific niche, supplying critical technology to larger industries. This contrasts with the American model, which often prioritizes winner-take-all platform dominance. This value-chain orientation is one of Europe's hidden strengths, fortified by what Dr. Scheffer calls *"the biggest concentration of industrialized means in the world"* across a corridor stretching from Western Poland to the Netherlands. It is a region where American startups now come to find suppliers for their complex engineered products.

> "We have a sizable number of companies that could become unicorns", he emphasized, "but if you look at the whole portfolio, it is more likely that we generate companies that have hundreds of millions of turnover, but not billions".

Navigating Europe's funding challenge

The most significant hurdle for European innovation can be described as three distinct funding gaps that appear at different stages of a startup's journey. Dr. Scheffer provided a clear breakdown of this challenge and the EIC's strategy to address it.

EUROPE'S THREE FUNDING GAPS

GAP 1: The incubation climate (€500k – €5M)

- **The problem:** A lack of grants, business angels, and early-stage capital. This is especially true in regions with less "old money" or family offices, like Poland.
- **The solution:** This must be addressed at a regional and national level. Local authorities need to foster a better incubation climate.

GAP 2: The EIC sweet spot (€5M – €25M)

- **The problem:** Historically a Europe-wide issue, but it is now "on its way to be solved".
- **The solution:** EIC instruments are specifically designed to cover this segment. The EIC has also established a "Trusted Investment Network" to bring private co-investors together and speed up syndication for companies, even those in less-developed regions.

GAP 3: The scaling-up chasm (€50M – €500M)

- **The problem:** Europe's biggest unsolved challenge. The money exists in Europe (e.g., large pension funds), but it is not being channeled into innovative scale-ups; instead, it often flows to US VCs.
- **The Solution:** High-level policy intervention is required. Dr. Scheffer points to a planned EU-wide scale-up fund and a "Savings and Capital Union" to incentivize institutional investment in this asset class.

THE US MAGNET: WHY EUROPEAN STARTUPS LEAVE (AND WHY THEY STAY)

The relocation of promising European startups to the United States is a persistent concern. Dr. Scheffer identifies three core reasons for this phenomenon, but also a powerful reason why many are choosing to stay.

1. **The capital narrative:** The US venture capital landscape has a longer history, creating a powerful narrative that "if I want to grow, I have to have American capital". This financial gap is narrowing in the early stages, but it remains vast for large-scale funding, and US investors often mandate relocation. Dr. Scheffer highlighted that the EID actively counters this.

> "We required that its funded companies remain in Europe; out of 350+ equity investments, only three have relocated (and lost EIC funding). However, for non-EIC funded companies, the average relocation rate is about 6%, with Poland and Portugal being particularly high."

2. **The fragmented single market:** A more serious, non-financial problem is market fragmentation.

> "For a lot of products, medical devices or pharma, if you want to scale up fast, the US is much better than Europe, where you have at least 27 healthcare systems", Dr. Scheffer stated.

This regulatory and administrative maze is a significant barrier to scaling, a point emphasized in the Draghi report on European competitiveness.

3. **Europe's counter-advantage - The industrial ecosystem:** Counterbalancing these challenges is Europe's

unparalleled network of industrial subcontractors and engineering expertise.

> "If you need complicated engineered products, Europe has a much better network than the US has", he noted.

This explains why Europe is stronger in areas like industrial deep tech and less so in purely software, where the disadvantages of a fragmented market are more pronounced.

DOUBLE-EDGED SWORD OF REGULATIONS

Dr. Scheffer argues that the debate around regulation is often oversimplified.

> "We would not have advances in battery technology, hydrogen, windmills, or solar panels if there were no legal obligations to phase out fossil fuels", he said.

On one hand, regulation can be a powerful driver of innovation.
In this sense, regulation boosts new technologies by making old ones more difficult or costly. On the other hand, the process can be crippling. The procedures for getting authorization for novel foods or medical devices are so long they can hamper innovation. However, the problem may not be the rules themselves, but a "lack of capacity to do the permitting process". There is a growing awareness that without sacrificing safety, the procedures need to be simplified. He also warns against "gold-plating", where member states add extra, complicating layers to EU directives, undermining the single market.

A blueprint for action for an emerging ecosystems

In the final part of our discussion, we requested Dr. Scheffer to share direct, actionable advice for the stakeholders of an emerging innovation hub like Wrocław and Lower Silesia.

His recommendations form a clear blueprint for cultivating a world-class deep-tech ecosystem.

FOR CITY AND REGIONAL POLICYMAKERS

- **Own the vision:** Leadership is paramount. Dr. Scheffer notes that in successful regions, the mayor and regional authorities actively "own" the topic of innovation, making it a clear priority.
- **Forge university collaboration:** Actively create a "valorization roundtable" where all local universities meet regularly to share information, analyze successes, and collaborate on turning research into businesses. The city can facilitate this with just one part-time coordinator.
- **Trace and nurture success:** Do not wait for innovators to come to you. Actively identify researchers who have won prestigious grants (like ERC grants) and offer them concrete support to apply for patents, find entrepreneurial partners, and secure next-stage funding.
- **Build smart hubs:** Ensure the right "spatial conditions" exist for startups to cluster. Crucially, avoid "cannibalism" by creating specialized hubs, one for AI, one for medical tech, one for industrial tech, rather than three competing general-purpose incubators.

FOR UNIVERSITIES AND RESEARCH INSTITUTIONS

- **Cultivate commercial curiosity:** While not every professor needs to be an entrepreneur, institutions should foster a culture of curiosity about how their knowledge can spin out and have a real-world impact.
- **Organize multidisciplinary projects:** Actively structure programs that force collaboration across departments. Dr. Scheffer highlights the success of compulsory interdisciplinary courses where "a medicine/technology person, an engineer, and a business student have to develop a case together". If this is not possible within one university, organize it across multiple institutions.

FOR STARTUPS AND INNOVATORS

- **Team up:** The successful model of startups is a team that starts - and not a single person. Dr. Scheffer emphasized this and also advised that a perfect blend is at least 3 people, CEO (Chief Executive Officer), CTO (Chief Technology Officer) and CFO (Chief Financial Officer).
- **Connect and find comfort:** The startup journey is hard and there will be a lot of challenges. Being part of a hub or ecosystem provides a crucial support network where you can give and receive advice and find comfort.
- **Embrace collaboration:** In a well-functioning ecosystem, there is a "help factor" and collaborations flourish. If you have a lot of friends who you help, they will help you when you're in trouble, and if you cheat with everyone, well, you're in trouble.

FOR LOCAL AND REGIONAL INVESTORS

- **Syndicate, syndicate, syndicate:** Do not go at it alone. Organize a local "trust--invest network" to form investment roundtables and pool resources and expertise around promising startups.
- **Be a magnet for outside capital:** The most important skill is not just investing your own funds, but developing the ability to attract other investors from major European/Global hubs to co-invest in local companies.

A FINAL THOUGHT: THE HUMANE PRINCIPLE OF INNOVATION

As our conversation concluded, Dr. Scheffer offered a simple but profound principle that should guide all technological development, especially in the age of AI. He warns against the haste to regulate things we do not fully understand, but also acknowledges the real dangers of unchecked technology, particularly for children. The guiding principle, he says, is simple:

It is a powerful reminder that at the heart of Europe's deep-tech ambition lies a commitment to building a future that is not only innovative but also responsible and humane.

> "Don't do online what you would not do to your neighbor."

Lower Silesia Showcase

Lower Silesia: A European Hub for Innovation and Growth

ECONOMIC POWERHOUSE

€62.188 Billion

GDP (2023), 4th largest regional economy in Poland.[1]

8.3%

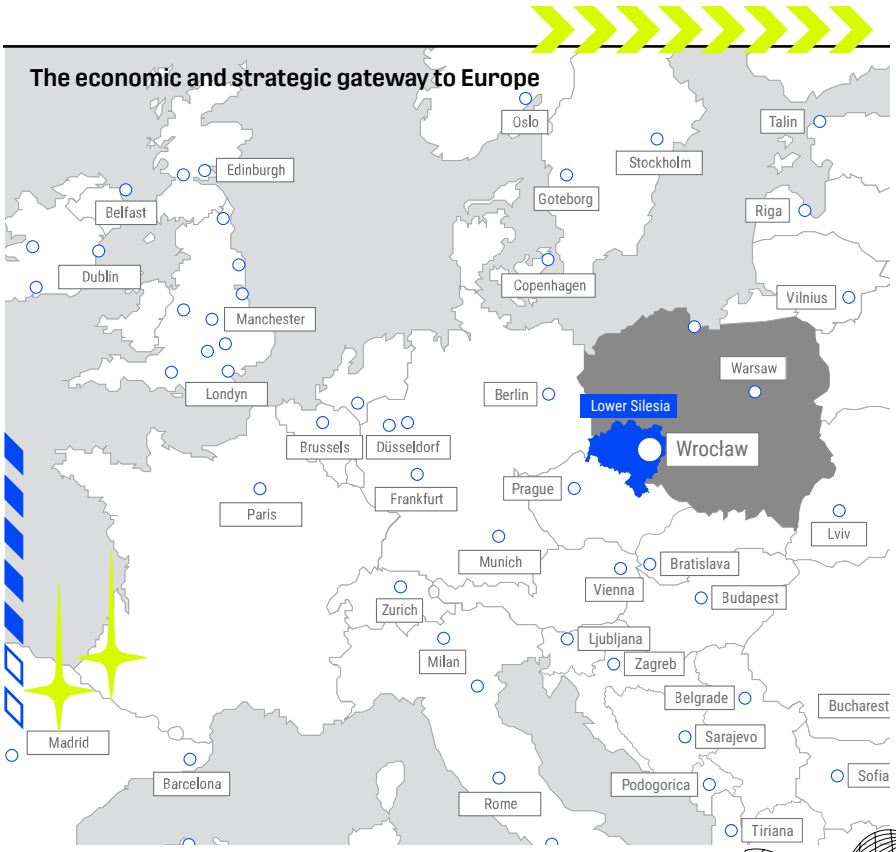
Share of Poland's national GDP.[2]

€22,100

GDP per capita (2023), reaching 107.1% of Poland's.[2]

3.3%

Projected GDP growth for Poland in 2025, providing a strong economic tailwind.[3]



STRATEGIC LOCATION

At the crossroads of Europe

Direct borders with Germany and Czechia.

Superior connectivity

Located on the A4 motorway, a key pan-European corridor, and home to one of Poland's largest railway junctions, international airport.[4]

A MAGNET FOR GLOBAL INVESTMENT

Top-ranked FDI destination

Consistently one of the most attractive regions for investment in Poland.[5]

Home to global leaders

Major operations for Mercedes-Benz, BNY, Bosch, LG, 3M, and PepsiCo.[6]

Pro-business incentives

Four Special Economic Zones (SEZs) offering significant public aid and income tax exemptions.[4]

Deep talent pool and splendid quality of life

THE TALENT PIPELINE

117,600
University students in the region.[7]

21,000+
Students in STEM fields at Wrocław University of Science and Technology alone, fueling high-tech industries.[8]

7%
Share of international students, adding diverse skills.[7]

3 World-Class universities
Wrocław University of Science and Technology, the University of Wrocław, and Coventry University, all featured in the QS World University Rankings.[9]

THRIVING LABOUR MARKET

4.8%
Unemployment rate in Lower Silesia (June 2025), below the national average.[10]

#1 in Poland
Rank for highest average salary among all voivodeships.[11]

PLN 9,921.65 (~€2,329)
Average gross monthly salary in Wrocław's enterprise sector (June 2025).[10]

PREMIER DESTINATION TO LIVE, STUDY, WORK

#1 Mid-sized European city is in Lower Silesia
For "Human Capital and Lifestyle" in the fDi Intelligence "European Cities & Regions of the Future 2024" ranking.[12]

Rich culture & nature
Home to UNESCO World Heritage sites, hundreds of castles, and stunning national parks.[13]

Affordable living
A high quality of life with significantly lower living costs than other European hubs like Prague or Berlin.[14]

Poland's epicenter for startups and R&D

THE STARTUP CAPITAL OF POLAND

#2 Region in Poland
Home to 17-20% of all Polish startups. [15, 16]

Globally recognized
Wrocław ranks #176 worldwide, and #11 in Eastern Europe.[16]

Rising star ecosystem
Ranked 8th in the 2022 Dealroom report on Ecosystem Benchmarking.[17]

250+
Registered startups with Startup Wroclaw.[18]

HIGH-GROWTH TECHNOLOGY SECTORS

28.8%
Annual growth of startup ecosytem, reported in 2025.[19]

Medtech leader
Wrocław is ranked 16th globally, and 1st in Poland in this sector.[19]

AI, DeepTech and IoT
35% of Startups in Lower Silesia reported it as their core focus.[20]

Game Development
Poland's 4th largest gamedev hub, 53 studios with 1,500+ employees and home to global success Techland (Dying Light). [21, 22]

A COLLABORATIVE INNOVATION ECOSYSTEM

50+
Incubators and co-working spaces.

50+
Specialized laboratories.

100+
R&D and IT centres.

44+
Industrial sectors.

Wrocław Technology Park
The largest in Poland in terms of number of companies.[23]

The investment opportunity

WHY LOWER SILESIA? THE COMPETITIVE ADVANTAGE

Europe's most business-friendly mid-sized region

Lower Silesia region, has repeatedly been recognized as a highly business-friendly mid-sized city.[12]

Strategic cost advantage

Lower operational costs compared to Western European hubs while maintaining high-quality infrastructure and talent pools.

Proven investor satisfaction

89% of companies, surveyed by "Invest in Wroclaw" rated their investment decision in Lower Silesia as "very good" or "excellent". [24]

STRATEGIC INVESTMENT SECTORS: SMART SPECIALISATIONS

Lower Silesian Smart Specialisations (RIS3 2030)[25]

The Lower Silesian Innovation Strategy 2030 focuses on industries like Chemistry and Medicine, Auto-Moto-Aero-Space, Natural and Recycled Raw Materials, and Machinery and Equipment, along with horizontal specialisations such as the Green Deal, Industry 4.0, and technology-assisted living.

Chemistry and Medicine

Auto-Moto-Aero-Space

Natural and Recycled Raw Materials

Machinery and Equipment

Green Deal
(horizontal specialisation)

Life assisted by technology
(horizontal specialisation)

Industry 4.0
(horizontal specialisation)

A PRO-INNOVATION AND BUSINESS ENVIRONMENT

Financial Incentives & Tax Benefits

- **200% R&D costs deduction** on eligible costs from tax base with the R&D tax relief.[26]
- **Preferential 5% income tax rate** on income generated from qualifying intellectual property rights (IP Box).[26]
- **Reduced 9% Corporate Income Tax (CIT)** rate, available for small taxpayers and new companies.[27]
- **6 months of social security exemption**, followed by 24 months of preferential rates.[27]

Government Support Programs

- EU Funding Access: Lower Silesia qualifies for 25% regional aid intensity (2025-2027).[28]
- Access to Horizon Europe and Digital Europe Programme funding.
- Simplified Business Registration:
  - 5-7 days average company registration time.
  - One-stop-shop support through ARAW (Startup Wroclaw, Invest in Wroclaw).

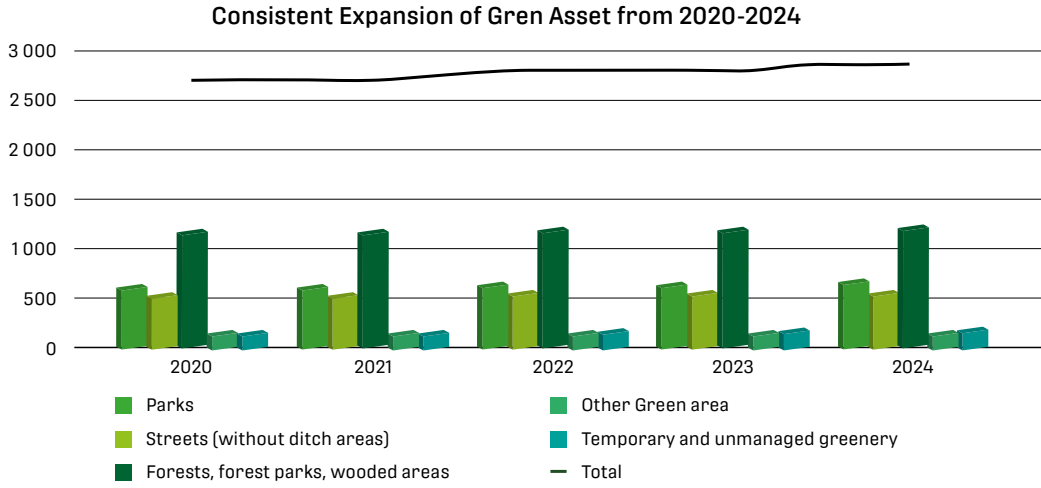
Wrocław: Poland's innovation engine

A city breathing green[23]

Wrocław is a city where nature is not just an addition, but a fundamental part of its identity.

over 41%

of the city's area is dedicated to green spaces, making it one of Poland's greenest urban centers.



Planting for the future

Wrocław is committed to increasing its green canopy through continuous planting and reforestation efforts.

NEW PLANTINGS IN 2024

2 963
Trees Planted

23 200
Forest Seedlings

75 881
Shrubs

103 366
Flowering Plants

388 383
Bulbs

48 855
Perennials

1 732
Creepers & Vines

644 380
Total New Plants & Bulbs

Wrocław: The Venice of the North[29]

Built on the Oder River and its many tributaries, Wrocław's identity is intrinsically linked to water. Its intricate network of canals and stunning bridges gives it a unique character and a vibrant waterfront life.

THE CITY OF BRIDGES

Wrocław is famously known as the "City of Bridges." This vast network is essential to the city's infrastructure and a major part of its charm.

114 Bridges

are under the direct care of the city's maintenance authority, with many more throughout the metropolitan area.

PROTECTING OUR WATERWAYS

Wrocław is a leader in urban water management, actively working to protect its most valuable natural asset. Following are some key initiatives:

"City – Water – Quality of Life" Congress:

- An international platform focused on the relationship between urban and aquatic environments, seeking solutions to mitigate negative impacts and improve quality of life.

A WATERFRONT LIFESTYLE

The Oder River provides not just a beautiful landscape but also a hub for recreation and community life, with beach bars, marinas, kayaking routes, and picturesque embankments for residents to enjoy.

Read more:

Smart and digital Wrocław[30]

Wrocław leverages technology to create a more efficient, responsive, and convenient urban environment for its residents. From e-governance to intelligent transport, the city is building a digital future.

E-SERVICES AND E-GOVERNANCE

Accessing city services has never been easier, thanks to a robust digital infrastructure.

- **Wrocław Spatial Information System (SIP)** - a modernized platform providing geospatial data and powering e-services.

  See more:

- **80 Official Procedures** - now available as "e-services," allowing residents to handle matters online.

  See more:

- **78% of Applications** - to the Geodesy and Cadastre Authority were submitted electronically in 2024.

- **Cybersafe Wrocław** - a dedicated project to increase the digital security of municipal IT infrastructure and e-services.

  See more:

INNOVATING FOR A BETTER URBAN LIFE

Wrocław's vision for the future is built on citizen engagement, sustainability, and community well-being, all powered by smart technology and innovative projects.

DIGITAL PARTICIPATION: A CITY THAT LISTENS

Wrocław empowers its residents to shape the city's development through accessible digital platforms.

- **Wrocław Rozmawia Portal:** The central online hub for public consultations.
  - 1,127,647 visits in 2024.
  - 27 major public consultations conducted in 2024.

  Visit the portal:

- **Wrocław Participatory Budget (WBO):**
  - PLN 33 million allocated in 2024 for resident-proposed projects.
  - The vast majority of the 69,850 votes were cast electronically, with green space and sports projects being the most popular.

  Visit the portal:

IOT FOR A SUSTAINABLE AND HEALTHY CITY

The Internet of Things (IoT) is being used to create a more sustainable, safer, and healthier environment.

- **DigiTwins4PEDs Project** - uses Urban Digital Twins to co-create flexible, positive-energy districts, accelerating the transition to carbon neutrality.

  Read more:

- **Air quality monitoring** - In addition to official stations, a network of sensors on InPost parcel lockers provides granular, real-time data on PM2.5, PM10, and other pollutants, accessible to all residents via an app.

  See live air quality in Wrocław:

SMART HEALTH AND SAFETY

- **Telecare for seniors** - provides 500 seniors with a "life button" for immediate help in emergencies.

- **Mobile CTG** - expectant mothers can perform clinical-quality fetal well-being tests from the comfort of their home.

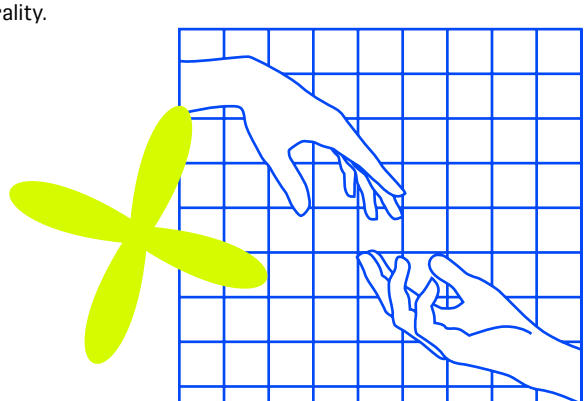
- **AI-powered health screening** - the city is testing an innovative AI solution for remotely measuring blood pressure and other vital signs.

A CONNECTED AND ALERT COMMUNITY

The city ensures residents are informed and safe, especially during critical situations.

- **Real-Time Alerts:** The mayor and city profiles on social media provide instant updates, crisis information, and city announcements.

- **Flood Hotline:** During the flood threat of September 2024, a dedicated hotline successfully handled nearly 2,000 calls, keeping residents informed and safe.



Welcoming the world

Wrocław is multicultural, multilingual and open for global talent and investment.

672 900
Total population

94 841
Foreign nationals residing in Wrocław

119
Nationalities

51 494
Individuals from from 108 countries working in various organizations

8 566
Individuals from 60 countries carrying out business activities

A city of many cultures

CULTURAL FESTIVALS

Wrocław has a rich calendar of events celebrating diversity.

- Skovoroda fest: An integration festival celebrating the cultures of 8+ nations, including Poland, Ukraine, Belarus, Turkey, Georgia, India, and Colombia.[31]
- European diversity month: A month-long (May) official celebration promoting equality and social inclusion through workshops, conferences, and public events.[32]
- Established traditions: Long-running events, exhibitions, workshops and shows are staples of the city's cultural life.[33]

INTERNATIONAL EDUCATION

A mature ecosystem for expat families.

- International schools: Wroclaw International School was founded in 2002, and since then several others, such as American School of Wroclaw, British International School of Wroclaw etc. have been established.
- Diverse curricula: Schools in Wrocław have variety of curricula, such as: International Baccalaureate (IB), British, American, and Montessori programs.

LANGUAGE AND COMMUNITY INTEGRATION

- Multilingual Services: Municipal support points like WroMigrant offer services in 5 languages: Polish, Ukrainian, English, Belarusian, and Russian.
- Grassroots Integration: The "Wrocław on Tongues of the World" program has connected over 5,000 foreign students with over 1,500 local volunteers for free Polish language exchange.[34]

MUNICIPAL SUPPORT HUB (WROMIGRANT)

- The city's central, free "one-stop-shop" for foreigners.
- Provides expert consultations on legal stay, work permits, healthcare, and navigating administration.

SPECIALIZED NGO ASSISTANCE

- Foundation Ukraine / Institute of Migrant Rights (IPM): Has provided over 35,000 free consultations on legal, professional, and integration matters.[35]
- ADRA Polska: Provided 550 people with psychological support and 300 with legal and career counseling.[36]
- NOMADA Association & Kalejdoskop Kultur: Offer a wide range of services from career counseling and Polish courses to cultural integration activities.[37]

BUSINESS AND ECONOMIC INTEGRATION (ARAW)

- The Wrocław Agglomeration Development Agency provides dedicated support for companies and their foreign employees.
- In 2024, it collaborated with 20+ investors and 649 new foreign workers successfully secured nearly 626 positive residence decisions for individuals.[38]

Start(up) in Lower Silesia

A quick soft-landing guide

Navigating the legal and administrative requirements of a new country is often the most daunting aspect of international expansion.

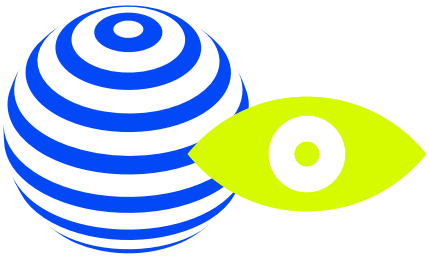
For businesses establishing a presence in Lower Silesia, this process is governed by a clear, structured framework. This section provides a detailed blueprint for securing legal residency, registering a company, and understanding core tax obligations, breaking down complex procedures into a manageable, sequential journey.

SECURING YOUR STAY: LEGAL RESIDENCE AND RIGHT TO WORK

EU/EEA/Swiss nationals have Freedom of Movement.

- Citizens of these countries can enter Poland with a valid travel document (passport or national ID) and do not need a work permit.
- Registration for Stays Over 3 Months: If you plan to stay longer than three months, you must register your residence at the local provincial (Voivodeship) office. This is a straightforward administrative process.

Read more on:



Non-EU nationals must follow a 3-stage process. It is required that the company must be legally registered first, as it is the entity that applies for the founder's initial work permit.

Stage 1: Work permit	Stage 2: National D-type visa	Stage 3: Karta Pobytu (Temporary Residence Permit)
Who: Your newly registered Polish company applies on your behalf.	**Who:** You apply at the appropriate Polish consulate in your country of residence.	**Who:** You must apply in person at the local Voivodeship office in Wrocław before your D-Visa expires.
What: Type B Work Permit is required for individuals serving on the management board of a Polish company.	**What:** A long-stay visa (up to one year) that grants the right to enter Poland and begin working legally.	**What:** This permit formalizes your right to reside and work in Poland for a longer period, typically up to three years.
Timeline: The process is lengthy and should be planned for in advance.	**Requirement:** The original Work Permit from Stage 1 is a mandatory document for the visa application.	**Cost:** The official stamp duty for a permit related to conducting business activity is PLN 340 as of 2025.
Read more:	Read more:	Read more:

Company and tax framework

COMPANY REGISTRATION

The Limited Liability Company (Spółka z ograniczoną odpowiedzialnością or Sp. z o.o.) is the most common and recommended legal structure for foreign investors.

- **Limited liability:** Protects shareholders' personal assets from business debts.
- **Low capital:** The minimum required share capital is only PLN 5,000.
- **Ownership:** Can be established and fully owned by any foreign national.

CHOOSE YOUR REGISTRATION PATH

Feature	Online (S24 System)	Traditional (Notarial Deed)
Speed	As fast as 24 hours.	2 to 4 weeks.
Cost	Lower (Court fees: PLN 350).	Higher (Court fee: PLN 600 + Notary fees).
Flexibility	Low (Uses a mandatory standard template).	High (Fully customizable agreement).
Best for	Simple structures, solo founders, speed focus.	Complex founder agreements, VC-backed startups.
Requirement	Polish Electronic Signature (Profil Zaufany).	In-person visit or notarized Power of Attorney.

Read more:

POLISH TAX SNAPSHOT

Corporate Income Tax (CIT)

19% Standard rate

9%* Reduced rate

*Available for new businesses in their first tax year and for "small taxpayers" whose revenue in the preceding year did not exceed €2 million.

Value Added Tax (VAT)

23% Standard rate

8% and 5%* Reduced rate

*Applies to specific categories of goods and services, such as certain foodstuffs, books, and hotel services.

Registration mandatory if annual turnover is expected to exceed PLN 200,000 (ca. € 46,900).

Social Security (ZUS) for entrepreneurs

Entrepreneurs are required to pay monthly contributions for social insurance (pensions, disability) and health insurance.

Health insurance

The contribution is linked to the entrepreneur's form of personal income tax (PIT).

4.9% **of the income base.** Applies to those on a flat tax (19%).

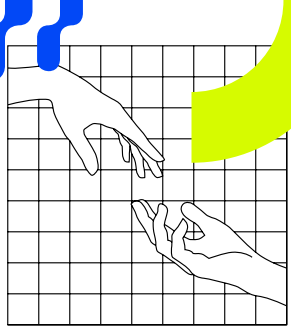
9% **of the income base.** Applies to those on the progressive scale (12%/32%).

- **old-age pension** 19.52%
- **disability** 8%
- **sickness** (optional) 2.45%
- **accident** 1.67%

The contributions are on 60% of the projected average monthly salary.

Read more:

Operations & Integration



YOUR WORKSPACES FOR DIFFERENT STAGES

Lower Silesia provides a mature market of office solutions suitable for every stage of a company's growth.

Workspace type	Typical cost (per person/month)	Best for	Examples
Coworking Space	Hot Desk PLN 300-600+	Solo founders, small te-ams, maximum flexibility.	Regus, Spaces, ideaPLACE
Serviced Office	Private Office PLN 800-1500+	Established teams, priva-cy, all-inclusive rent.	CitySpace, Business Link, Concordia Design
Business Incubator	Variable (often subsidized)	Early-stage startups, mentorship, funding access.	AIP (WUST), inQUBE (UEW)
Technology Park	Bespoke pricing	R&D-intensive companies, access to specialized labs.	Wrocław Technology Park (WPT)

Read more:

GETTING CONNECTED & SETTLED

TELECOMMUNICATIONS

The Polish market is competitive, with major operators like Orange, Play, T-Mobile, and Plus offering widespread 5G coverage. Business plans often inc-lude features like symmetrical connec-tions (equal upload/download speeds) and service level agreements (SLAs). UPC (now part of Play), Vectra, Netia etc. provide high speed broadband, upto 1 Gbps, in the central areas.

Actionable tip:

On-the-ground performance can vary significantly by location. Before signing a long-term contract, purchase prepaid SIM cards from 2-3 providers and run speed tests at your chosen office and home.

BUSINESS BANKING

Opening a corporate bank account is a mandatory step governed by strict Anti-Money Laundering (AML) and Know-Your-Client (KYC) regulations. An in-person visit by a company represen-tative is required by most banks.

Prominent banks: PKO Bank Polski, BNP Paribas, Bank Pekao S.A., Santander Bank Polska, Santander Consumer Bank, ING Bank Śląski, mBank, Alior Bank, Bank Millennium, Citi Handlowy, Credit Agricole, and Nest Bank.

Important unwritten rule:

Banks need to see genuine business ties to Poland. Be prepared to show an office lease, local employee contracts, or client agreements to ensure a smooth approval process.

ENGLISH IS WIDELY SPOKEN, BUT LEARNING POLISH IS A HUGE PLUS

Community Integration: Wrocław has a vibrant and welcoming internatio-nal community. ARAW and other local organizations/groups organize several professional events providing ample opportunities to meet local people. Moreover, organizations and city-sup-ported points like WroMigrant offer support and help foreigners integrate into the life of the city. Expat social com-munities are also very active.

Your soft-landing checklist

This checklist provides a high-level overview of the key action points for establishing a business in Wrocław.

PHASE 1: PRE-ARRIVAL (3-6+ MONTHS BEFORE MOVE)

1. **Contact ARAW ("Startup Wroclaw" or "Invest in Wroclaw"):** Initiate contact for preliminary guidance and data.
2. **Secure legal counsel:** Engage a Polish law firm to advise on company structure and immigration.
3. **Company registration (Remote):** Decide between S24 and Notarial Deed (via Power of Attorney) and complete the company registration in the National Court Register (KRS).
4. **Work permit application (Non-EU):** Have your new Polish company apply for your Type B Work Permit.
5. **National D-Visa application (Non-EU):** Once the work permit is issued, apply for your D-Type visa at the Polish consulate in your home country.
6. **Initial office search:** Research coworking spaces and serviced offices online.

PHASE 2: FIRST WEEK IN WROCŁAW

1. **Purchase prepaid SIM card:** Buy SIMs from at least two major providers to test network quality.
2. **Address registration (Meldunek):** Register your residential address at the local city office (a requirement for the residence permit).
3. **Obtain a PESEL:** It is done along with registration of your residential address, and is required for almost all formal documentation.
4. **In-person bank visit:** Schedule an appointment to open the corporate bank account. Bring all required original documents and sworn translations.
5. **Explore Neighborhoods:** Visit potential residential areas like Stare Miasto, Krzyki, or Śródmieście.

PHASE 3: FIRST MONTH IN WROCŁAW

1. **Finalize workspace:** Sign the agreement for your chosen coworking space or serviced office.
2. **Engage an accountant:** Finalize your choice of an accounting firm to handle CIT, VAT, and ZUS compliance.
3. **Register for ZUS:** Complete the formalities for your personal social security contributions as an entrepreneur.
4. **Integrate with professional and social community:** Events organized by Startup Wroclaw and other organizations would be very helpful.
5. **Enroll in a Polish Language Course:** Sign up for an introductory or business-focused Polish class to begin your integration journey. (Optional but recommended).
6. **Temporary Residence Permit Application (Non-EU):** Submit your application for the Karta Pobytu at the Voivodeship Office (recommended to be done after a few months of residing in Lower Silesia, and well before the expiration of the visa).

Visit Wrocław's "Let's Create - Wrocław the place to live" welcome centre for more information.

Foreigners in Wrocław

Roman and Andrzej Robotecki

FOUNDERS OF QPER

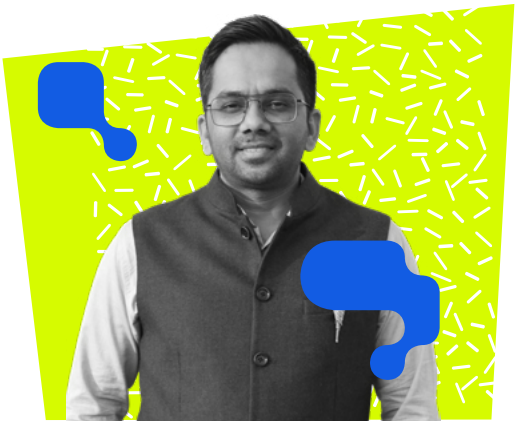
Wrocław is where ideas turn into global business, thanks to a vibrant and supportive ecosystem.

Coming from Ukraine, we made Wrocław our home 15 years ago. The city offers a strong and supportive startup ecosystem - mentoring, IP protection, and access to clients and investors. Thanks to Startup Wroclaw we showcased our solution at major international events, gained valuable contacts, and accelerated our growth.

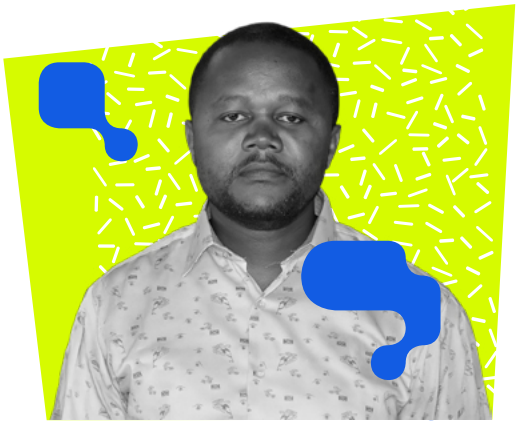
Usman Khan

BUSINESS DEVELOPMENT CONSULTANT, PADCARE

Wrocław is the perfect place to start and scale a business – friendly, open, collaborative, and full of opportunities for global growth.



As PadCare's Business Development Consultant, I drive PadCare's EU expansion. Startup Wroclaw & ARAW supported & provided the platform to showcase PadCare's innovation. Wrocław's collaborative ecosystem makes it an ideal hub for scaling impactful innovations.



Justin Mwakatobe

INNOVATOR/TECHNOLOGIST – CHAMPIONING 4IR, ASSISTANT LECTURER – SYSTEMS & COMPUTER NETWORKS

Wrocław is the kind of place where ideas can really take off and turn into businesses with a truly international flavour.

Since graduating from Wrocław University of Science and Technology, I have been inspired by Wrocław's vibrant startup scene. Training in AI and innovation fuelled my growth and gave me confidence to launch a company in Mbeya, Tanzania, and foster partnerships between Wrocław, Poland, and Africa.

Doğan Doğanca

POLAND COUNTRY MANAGER & GROWTH OFFICER, SEATECH GLOBAL

Wrocław is where bold ideas meet the right ecosystem to grow.

With a decade of CX & HR software expertise, Seatech began its European journey in 2025 from Wrocław with a local partner. Startup Wroclaw proved our choice right, helping us connect and understand the city's dynamic startup ecosystem.

Haniyeh Raji

BUSINESS & DATA ANALYST, STARTUP ENTHUSIAST IN ESG & SUSTAINABILITY INNOVATION

Startup Wroclaw's workshops and community make it the most welcoming place for innovation.

I work on gamification for behavioral change and ESG sustainability. As a non-European female in tech, I faced challenges and limited university support. Yet Startup Wroclaw's friendly and supportive environment, workshops, and networking gave me guidance and connections.

Tito Morais

SENIOR SOFTWARE DEVELOPER

Wrocław: the meeting place for innovators and entrepreneurs.

I had some good contacts due to the Startup Wroclaw meeting, and still nowadays I have contact with some of them.

Connectivity & Access
to Lower Silesia, the heart of Europe

International air connectivity

- **Wrocław Nicolaus Copernicus Airport (WRO)** serves as a key international gateway, with a growing network of destinations and consistently rising passenger.
- Just **10 km from Wrocław's city center**.
- **Direct flights:**
  72 destinations in 27 countries.[38]
- **Airlines operating at WRO:** Lot Polish Airlines, KLM, Lufthansa, Ryanair, Finnair, Air Dolomiti, Swiss, and Wizz Air.[39]

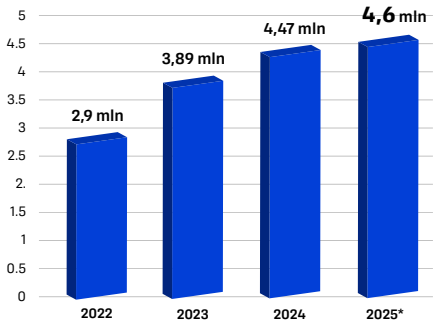
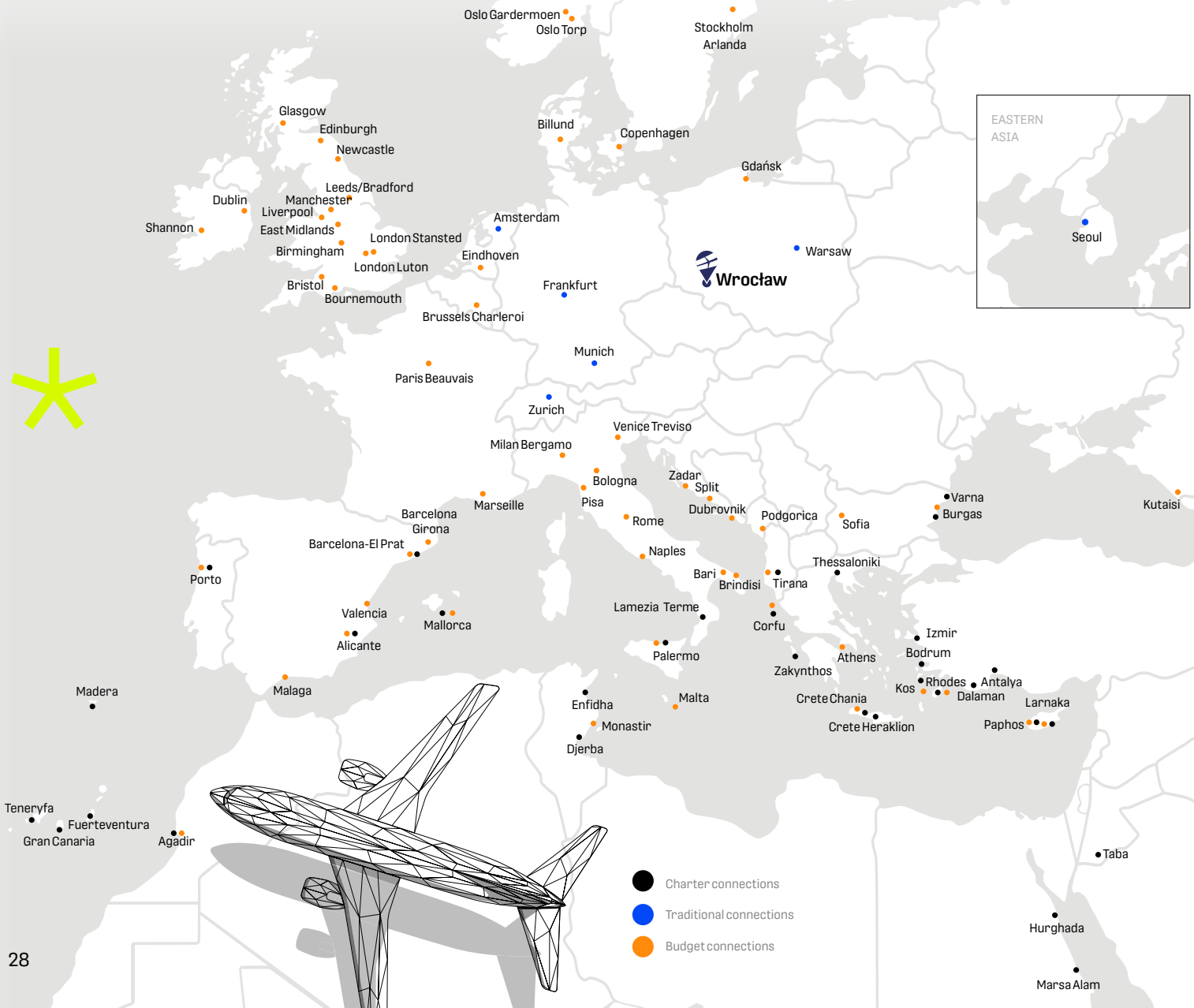


Chart 2: Annual Passenger

*Estimated based on 2.3+ million passengers in the first half of 2025, an increase of 15% compared to 2024.[40]

Major expansion plans to reach an annual capacity of 10 million passengers by 2035.[41]



Road network connectivity

Lower Silesia sits at the intersection of key European road corridors, driving its role as a logistics hub. The national network has expanded rapidly, enhancing connectivity.[42]

Lower Silesia's Key Road Corridors

Route Name	Strategic Role	Key Connections
A4 Motorway	Pan-European E40 Corridor: East-West Axis	Germany (Dresden) <> Wrocław <> Katowice <> Ukraine (Lviv)
S3 Expressway	Baltic-Adriatic TEN-T Corridor: North-South Axis	Baltic Ports (Świnoujście) <> Legnica <> Czechia
A8 Motorway	Wrocław Metropolitan Bypass	Integrates A4 and S8, creating a seamless ring road
S5 Expressway	National North-South Connector	Wrocław <> Poznań <> Bydgoszcz

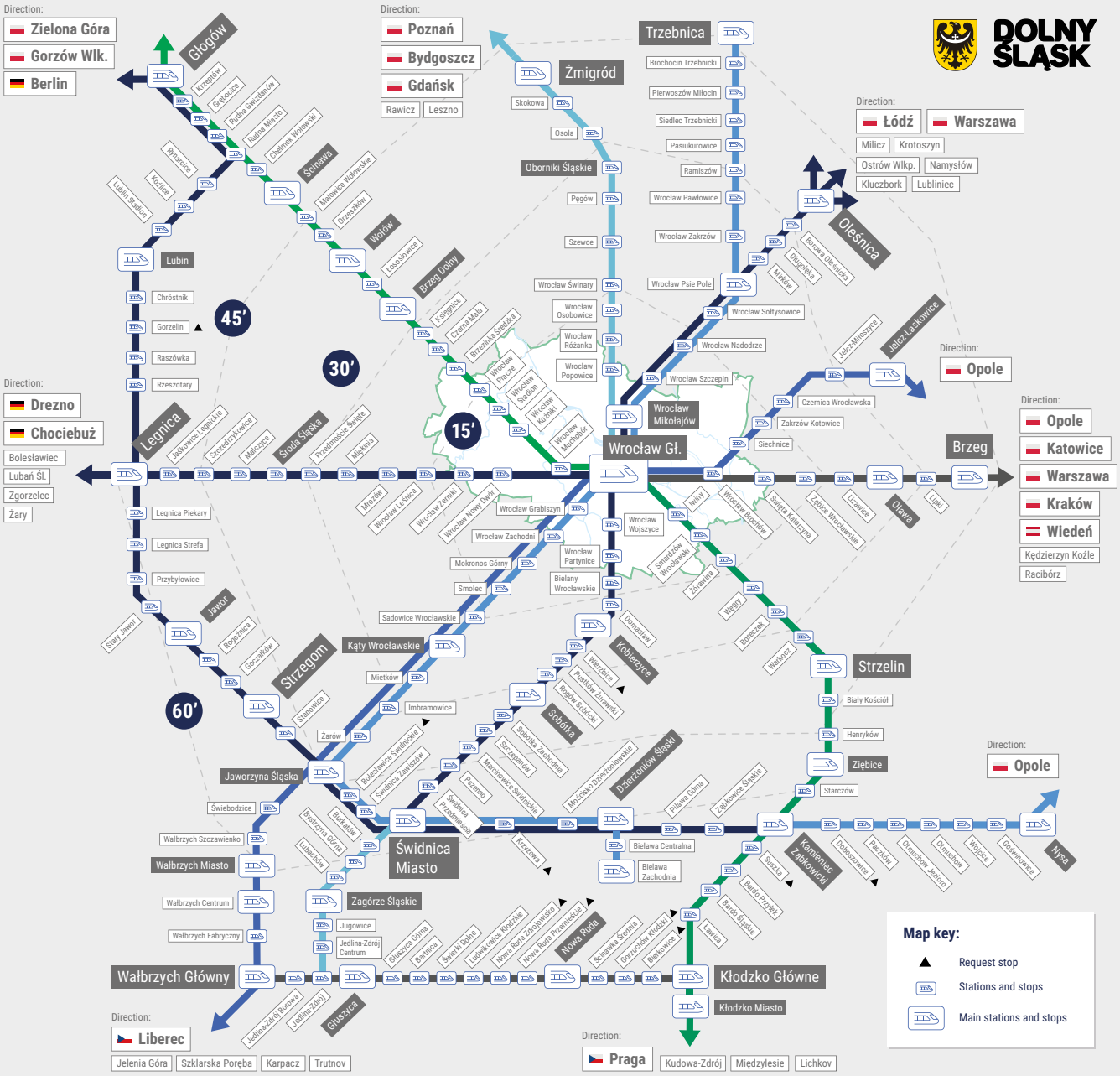
Travelling to major cities	Travelling key ports
Berlin – 3.5 hours, 345 km	**Bremerhaven – 7 h**, 760 km
Prague – 4.0 hours, 286 km	**Gdańsk – 5 h**, 550 km
Lviv – 6.2 hours, 595 km	**Hamburg – 6.5 h**, 630 km
Warsaw – 3.3 hours, 347 km	**Rotterdam – 9.5 h**, 1,000 km
Kraków – 3.0 hours, 272 km	
Poznań – 2.0 hours, 175 km	

International, national and regional rail network

Wrocław Główny station, a major hub for national and international travel, provides access to High-speed Express InterCity Premium (Pendolino) trains that connect to all major Polish cities, and to Germany, Austria and Czechia.[42]

The regional network operated by Koleje Dolnośląskie provides passenger train services within the Lower Silesian Voivodeship and to parts of the Czechia. The company offers the KD GO! mobile app, which allows passengers to track train locations and check occupancy levels in real-time.[42]

INTERNATIONAL, NATIONAL AND REGIONAL RAIL NETWORK



Smart Transport for a Moving City

Technology is at the heart of Wrocław's public transport system, making commutes smoother and more predictable.

DYNAMIC PASSENGER INFORMATION (DIP)

- Real-time arrival information is displayed at bus and tram stops, powered by GPS data from every public transport vehicle.
- Displays also show alerts about disruptions, detours, and air quality.

FULLY DIGITAL TICKETING

- URBANCARD EP: A modern city card that serves as a season ticket and an electronic wallet.
- Effortless Payment: Buy tickets directly in the vehicle using a contactless card or phone, via the URBANCARD mobile app, or at modern ticket machines.

Read more:

HELPFUL MOBILE APPS

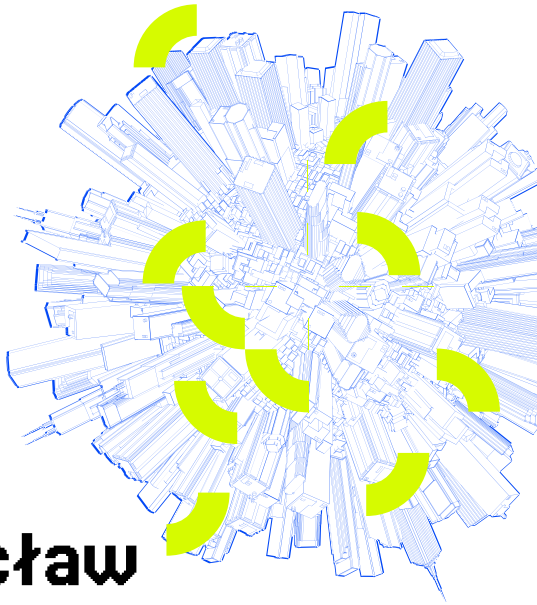
- **iMPK** provides real-time locations of buses and trams.

Download:

iOS: Android:

- **ParkSpaceEco** helps drivers find available parking spots, showing the probability of finding a space at their destination.

Use web application or download mobile application:



Local transportation in Wrocław

WROCŁAW PUBLIC TRANSPORT

285+ trams

328+ buses

MPK Wrocław, the Municipal Communication Enterprise in Wrocław, operates buses and trams connecting all corners of the city and adjoining communes.[43]

THE INTELLIGENT TRANSPORT SYSTEM (ITS)

The ITS is the brain of the city's transport network. It acquires and processes data from across the city to:

- Optimize traffic light timing.
- Manage traffic flow.
- Provide drivers and passengers with real-time information.

DEDICATED BIKE PATHS

The city has dedicated bike paths which are used by **more than 30,000 inhabitants** regularly.[44]

- Total Cyclist-Friendly Routes: Over 1,450 km.
- Includes: Dedicated bicycle paths, pedestrian/bike paths, on-road bike lanes, and routes through parks and along embankments.

The city has also over 200 City Bike stations where it is possible to rent a bike, you have to register in the system via Wrocław City Bike.[45]

Check it out here:

DEDICATED BIKE PATHS

200+ City Bike stations

1,450+ Cyclist Routes

30,000+ inhabitants regularly using dedicated bike paths

Read more:

Driven by Knowledge, People & Innovation 2024 - discover the potential of Wrocław

Networking in Lower Silesia

Snapshot in numbers

550+

Tech and business events annually

30+

Active Tech Communities and meetups

12,000+

Active ecosystem members

COMMUNITIES AND GROUPS

- Startup Wroclaw
- TechSHEroes
- Wroclaw Tech Business Angels Club (WTBAC)
- ITCORNER
- meet.js Wrocław
- Wroclaw Open-Source Meetup
- Stacja IT Wrocław
- Digital People Wrocław
- Girls Concept
- Hackerspace Wrocław
- Wrocław Blockchain Meetup
- Angular Wrocław
- Wro.cpp
- Wrocław Java Users Group
- Wrocław SAP Community
- Wrocław Wordpress Meetup
- Wrocław AI Team (WAIT)
- GDG Wrocław
- GoWroc
- ServiceNow Meetup Wrocław
- JCI WRO – Młodzi przedsiębiorcy i liderzy
- Network Science Lab at Wrocław Tech
- Product Cafe
- MeetContent Wrocław
- Slack Community Wrocław

Sectors and themes

Prominent sectors		
Information and Communication Technologies (ICT)	**Engineering and Advanced Manufacturing**	**Health and Life Sciences**
Artificial Intelligence Machine Learning Data Science Software Engineering (JavaScript, Python) Open Source (Software & Hardware) Cybersecurity Cloud Computing	Electronics Design & Production Robotics Automation Automotive Aerospace Architecture Engineering Construction (AEC) tech	Medtech Biotechnology Personalized Oncology Neuroscience Cardiology Digital Health Pharmaceuticals

Other Key Sectors		
Startup & Venture Capital	**Energy & Sustainability**	**Space Technology**
Pitching Fundraising Business Modeling Scaling Legal & IP Product Management Investor Relations	New Energy (Battery Power, BMS) Green Technologies Circular Economy Electromobility Renewable Energy Sources (RES)	Satellite Data Autonomous Robots Space Exploration Tech Earth Observation Technology Transfer from Space Sector

Major meetups and conferences

MADE IN WROCLAW

Made in Wroclaw is a unique business event focused on technology and innovation. Every year it attracts leading experts, industry leaders and technology enthusiasts to Wrocław. This year's event, under the motto "Power of Synergy", includes a conference, expo, investor-focused gathering, and business gala combined with a technology competition for startups.

EVOLUTIONS: MEETUP & SHOWCASE

Evolutions: Meetup & Showcase is the biggest regional startup event that brings together SMEs, innovators, investors and professionals from technology and creative industry. Organized by Startup Wroclaw and OVHcloud Startup Program, one of the most respected seed accelerators.

STARTUP WRO MEETUP

A series of meetups that focus on practice and solid knowledge. For anyone interested in the local startup community - from founders and investors to students. The goal is to collectively create a platform for interesting projects to find inspiration, partners and funding, and for graduates to discover their dream jobs.

WRO VENTURE CONNECT

An investor-focused event uniting business angels and VC funds in Wrocław for networking, panels, and portfolio-building discussions. The event offers practical insights, startup success stories, and a chance for founders and investors to meet and discuss direct investment opportunities.

TECH TAP TUESDAY

A monthly social and networking event series organized by Startup Wroclaw at Bistro Stu Mostów, to bring together tech professionals, founders, and enthusiasts in an informal setting. The open format is designed to connect Wrocław's expanding startup and tech ecosystem through fun conversation and community spirit.

Startup Wroclaw App

Events calendar: iOS app: Android app:

THE ECONOMIC FORUM

Held annually in Karpacz (Lower Silesia), The Economic Forum is one of Central Europe's largest business and political conferences, attracting over 6,000 guests and 500+ sessions. Topics include regional development, AI, healthcare innovation, climate, and international politics, with a special focus on Lower Silesian investment and cooperation. The event features award galas and strategic partnerships, promoting the entire region's economic dynamism and innovation.

UPGRADE (ITCORNER)

It is a knowledge and networking conference organized by ITCORNER, gathering tech company leaders, innovators, and entrepreneurs. It covers digital transformation, leadership, and practical skills for scaling technology businesses. The event features keynote speeches, panel discussions, and in-depth workshops designed to address industry challenges.

PITCHMEETUP

It is a recurring event for early-stage startups and entrepreneurs to present their ideas before an audience of investors, mentors, and peers. Participants receive feedback, expand their networks, and often access further acceleration opportunities. The event's hands-on format is focused on actionable insights, practical pitching, and funding readiness.

EAST-WEST FORUM

A cross-regional event fostering dialogue between innovators, investors, and decision-makers from Eastern and Western Europe. It offers panels on tech trends, cultural exchange, and investment strategy. The forum channels connections for transnational projects and collaboration across startup ecosystems.

GROW UP TECH (AIP PWR)

Grow Up Tech is a pre-incubation and startup development program by the Academic and Business Incubator at Wrocław University of Science and Technology. It concludes with a demo day where participants showcase innovative tech projects after months of mentorship and refinement. The program supports student entrepreneurs, providing resources to turn ideas into viable startups in Wrocław's ecosystem.

INQUBE BREAKFAST

A morning meetup by inQUBE, brings together founders, students, and mentors for informal discussion, networking, and updates. The meetups are designed to facilitate collaboration and knowledge-sharing in the startup community.

I DESIGN MEETS

I DESIGN Meets is a community event focused on design, UI/UX, product development, and creative technology. It features workshops, expert talks, and showcases for designers and developers. Participants connect to exchange best practices, trends, and innovation in digital design.

LEGNICKI MEETUP TECHNOLOGICZNY

This is a technology-focused networking meetup held in Legnica, and attracts IT professionals, engineers, and local entrepreneurs for technical talks and panels. The event aims to strengthen regional innovation outside Wrocław, building a broad Lower Silesian tech community.

BLOCKCHAIN DEVS WROCŁAW

A specialized meetup for blockchain developers and tech enthusiasts in Wrocław. Sessions cover new technologies, coding practices, and real-world blockchain applications. Regular networking is facilitated for collaboration and skill-building in blockchain tech.

DOLNOŚLĄSCY LIDERZY BIZNESU

It is a forum for business leaders in Lower Silesia to share experiences, strategies, and success stories. It includes mentorship, company showcases, a regional product zone, and a networking area. Attendees span various sectors, promoting leadership and regional competitiveness.

MEET.JS WROCŁAW

It is part of the national meet.js network, organizing JavaScript-focused meetups and workshops. Front-end and full-stack developers gather for talks on web technologies, new frameworks, and best practices. The event prioritizes open-source and community-driven development.

REACT UNIVERSE CONF

It is a curated, in-person conference at the Wrocław Congress Center featuring talks, workshops, and networking on scaling React Native, performance, rapid shipping, animations, and evolving JS/native engines.

LINKEDIN LOCAL

It brings together professionals to connect offline, share experiences, and expand personal networks. Events include talks, networking activities, and peer learning across various industries. The community supports career development and fosters local business relationships.

SCIENCE & BUSINESS MEETUP WPT

A recurring event at Wrocław Technology Park (WPT) uniting scientists, entrepreneurs, and R&D experts. It features presentations of research, tech transfer opportunities, and business matchmaking. The goal is to accelerate commercial innovation through cross-sector collaboration.

HR MEETUP WROCŁAW

It gathers HR professionals, recruiters, and managers for discussions on talent management, organizational culture, and recruitment trends. Sessions include expert panels, training, and networking activities. The event supports the HR community's growth and adaptation to tech sector needs.

KONFERENCJA WALLSTREET

It is Poland's premier investor conference held in Karpacz. It offers keynotes, workshops, and networking for finance professionals, business leaders, and startup founders. The conference is known for deal-making, investment trends, and market analysis.

CONFERENCE AI VET

It is dedicated to artificial intelligence in vocational education and training. It discusses AI's role in modernizing skills development, teaching methods, and digital education. The event attracts educators, technologists, and policy makers focused on the future of work and edtech.

Multi-stakeholder Perceptions of the Lower Silesian Startup Ecosystem

This section presents an in-depth analysis and interpretation of survey data collected to understand the stakeholders' perceptions of the ecosystem. For this and all following sections, the stakeholders have been denoted as: Investors (Venture Capitalists, Business Angels), Startups (Founders or Co-founders), Aspiring Entrepreneurs (those planning or considering founding a startup/starting a business), Corporations (representatives of large businesses), Support Network (representatives of incubators, accelerators), Academia (representatives of universities/research institutions), and Public Support (public sector/ government representatives).

OVERALL PERCEPTION SCORE

6.86/10.00

Respondents rated the ecosystem's overall condition positively on a 1-10 scale, viewing it as functional with significant growth potential. While the scores suggest a strong foundation, they also reveal varied perceptions among stakeholder groups (Figure 3.8.a). Public Support, Corporations, and Startups were most optimistic, whereas Academia provided the lowest rating, indicating a potential disconnect from other players.

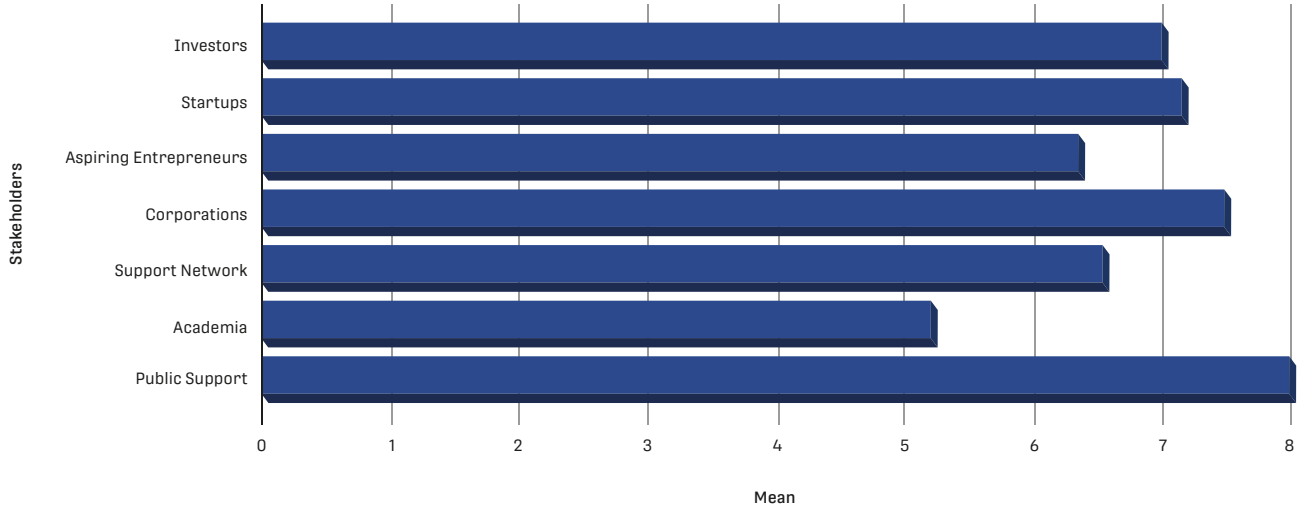


Figure 3.8.a. Comparison of perception score means among various stakeholders (N=133).

NET PROMOTER SCORE

Beyond a simple rating, the ecosystem's Net Promoter Score (NPS) of 27.28 indicates good stakeholder loyalty and level of advocacy (Figure 3.8.b). It reflects significantly more Promoters than Detractors, which is a strong asset. Large proportion of Passives, highlights a critical opportunity. Converting this group into active promoters could substantially accelerate the ecosystem's growth and reputation.

Figure 3.8.b. Breakdown of the Net Promoter Score (N=132).

Collaboration Matrix

The vibrancy of an ecosystem is often a direct function of the quality of collaboration between its constituent parts. The following matrix quantifies the perceived strength of relationships between different stakeholder groups, revealing a mixed landscape of connectivity where some ties flourish while others remain underdeveloped. See Table 3.8.a.

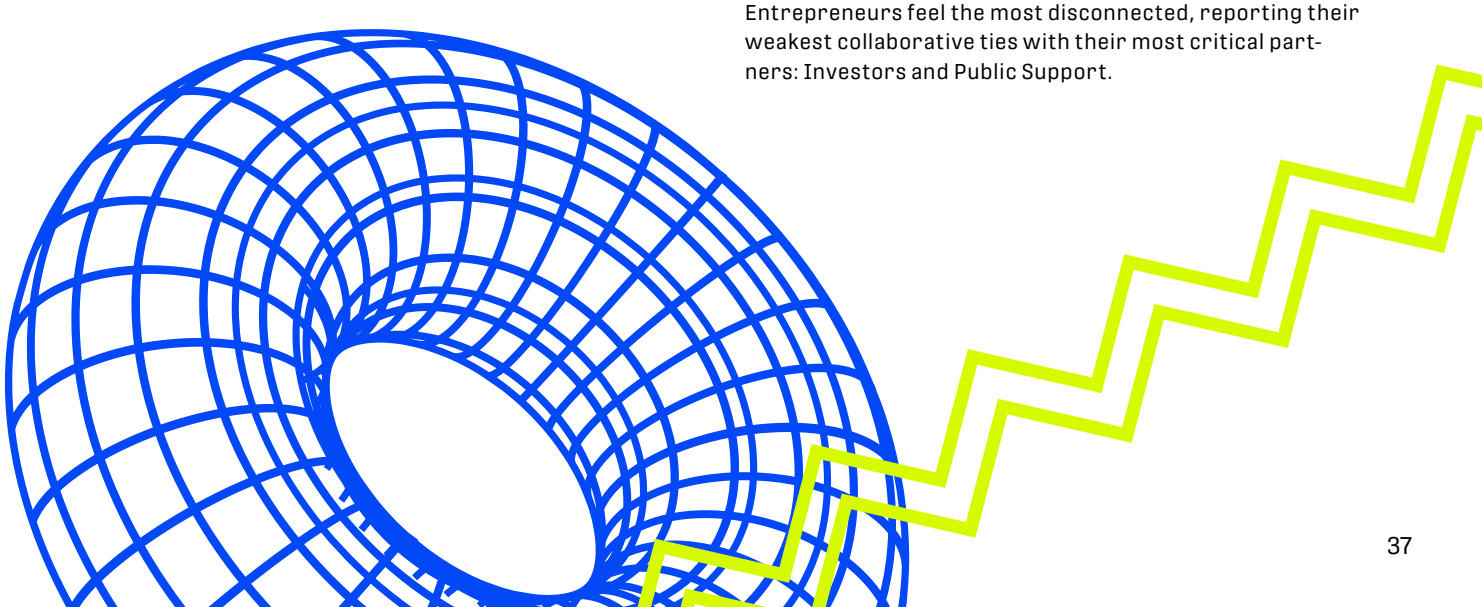
Table 3.8.a. Stakeholder Collaboration Matrix (Average Rating from 1 - Very Weak to 5 - Very Strong)

Respondent Group		Investors	Startups	Aspiring Entrepre-neurs	Corpora-tions	Support Network	Academia	Public Support
Group Being Rated	Startups	3.92	3.65	3.15	2.89	3.78	2.56	4.33
		12 (0.793)	49 (1.251)	20 (1.348)	9 (1.453)	9 (1.093)	9 (1.13)	6 (1.033)
	Investors	3.67	2.98	2.40	2.5	3.63	2.44	3.67
		12 (1.155)	47 (1.277)	20 (1.142)	8 (1.195)	8 (1.916)	9 (0.882)	6 (1.033)
	Corpora-tions	2.50	2.55	2.71	3.78	3.63	3.44	3.71
		12 (1.624)	42 (1.194)	17 (1.312)	9 (1.302)	8 (1.118)	9 (0.726)	7 (1.38)
	Academia	2.42	3.28	2.79	3.22	4.00	4.38	4.43
		12 (1.311)	47 (1.263)	19 (1.475)	9 (1.394)	10 (1.333)	8 (0.518)	7 (0.787)
	Support Network	3.58	3.46	2.76	2.5	3.7	3.11	4.33
		12 (1.084)	46 (1.242)	17 (1.147)	8 (1.852)	10 (1.494)	9 (1.269)	6 (1.211)
	Public Sup-port	2.25	2.82	2.42	3.57	3.9	3.78	4.38
		12 (1.215)	44 (1.299)	19 (1.427)	7 (1.902)	10 (1.876)	9 (1.202)	8 (0.916)

HOW TO UNDERSTAND THE DATA IN THE TABLE:

Each cell displays the mean rating of collaboration (1=Low, 5=High). The values below are presented as "Number of Respondents (Standard Deviation)."
The standard deviation measures consensus, where a smaller value indicates that respondents' answers were more aligned.

The collaboration matrix highlights a clear pattern: relationships involving Public Support are perceived as the strongest, particularly with Academia, the Support Network, and Startups. This points to effective public sector engagement. Conversely, the weakest links in the ecosystem consistently involve Investors, who report low levels of collaboration with Academia, Public Support, and Corporations. This finding is important, as a disconnect between capital providers and other key groups, especially emerging founders and research institutions, can severely hinder innovation and growth. Furthermore, Aspiring Entrepreneurs feel the most disconnected, reporting their weakest collaborative ties with their most critical partners: Investors and Public Support.



Attracting and retaining talent

Given that talent is the ecosystem's top-ranked strength, this section drills down into the specific factors that help or hinder the ability to attract and retain skilled professionals. Stakeholders rated various factors on a scale from 1 (Significant Disadvantage) to 5 (Significant Advantage), see Table 3.8.b.

Table 3.8.b. Perceived Factors for Attracting and Retaining Talent (Rating: 1 - Significant Disadvantage to 5 - Significant Advantage)

Factors	Stakeholders						
	Investors	Startups	Aspiring Entrepre-neurs	Corpora-tions	Support Network	Academia	Public Support
Availability of qualified graduates	2.42	3.29	4.3	4	3.88	4.1	4.88
	19 (1.677)	45 (1.740)	30 (1.022)	15 (1.254)	8 (1.727)	10 (0.568)	8 (0.354)
Availability of experienced senior-level talent	2.26	2.93	3.2	3.6	4	3.3	4.5
	19 (1.727)	45 (1.724)	30 (1.400)	15 (1.352)	8 (1.069)	10 (1.059)	8 (0.756)
Cost of living	2.47	2.51	2.73	3	2.75	2.5	2.88
	19 (1.467)	45 (1.487)	30 (1.388)	15 (1.254)	8 (1.282)	10 (0.972)	8 (1.727)
Availability of housing	2.21	2.71	2.7	2.93	3.38	3	2.5
	19 (1.619)	45 (1.727)	30 (1.317)	15 (1.163)	8 (1.188)	10 (1.247)	8 (1.604)
Availability of hotels	2.68	3.18	3	4.2	4.5	3.8	3.88
	19 (1.945)	45 (1.862)	30 (2.000)	15 (1.320)	8 (0.756)	10 (0.789)	8 (1.727)
Availability and cost of commercial office space	2.21	2.87	2.77	2.87	3.25	3	3.75
	19 (1.813)	45 (1.604)	30 (1.633)	15 (1.407)	8 (1.165)	10 (1.247)	8 (1.753)
Availability of transport to and from from Lower Silesia	3.26	2.98	2.93	4.13	4.38	3.6	4.38
	19 (1.661)	45 (1.889)	30 (1.701)	15 (1.302)	8 (0.744)	10 (1.174)	8 (1.061)
City support	2.37	2.51	2.83	3.4	3.38	3.4	3.75
	19 (1.499)	45 (1.576)	30 (1.510)	15 (1.454)	8 (1.061)	10 (0.843)	8 (1.669)

HOW TO UNDERSTAND THE DATA IN THE TABLE:

Each cell displays the mean rating of factors for attracting and retaining talent (1=Low, 5=High). The values below are presented as "Number of Respondents (Standard Deviation)." The standard deviation measures consensus, where a smaller value indicates that respondents' answers were more alinged.

The data reveals a critical distinction between junior and senior talent. The availability of qualified graduates is generally seen as an advantage, however the availability of experienced senior-level talent is perceived as a weakness, particularly by Investors and Startups. Furthermore, practical concerns like the cost of living and the availability of housing are rated as disadvantages by nearly all groups, signaling potential barriers to attracting talent from other hubs. Interestingly, Investors consistently rate nearly all factors lower than other stakeholders, suggesting they hold a more critical view of the city's talent infrastructure.

Comparing Lower Silesian Ecosystem with others

To contextualize its competitive position, stakeholders compared the Lower Silesian ecosystem to other Polish and international startup hubs. This analysis helps benchmark its current standing and identify its primary competitors. The results indicate a clear hierarchy, see Table 3.8.c. The Lower Silesian ecosystem is perceived as stronger than Polish hubs like Poznań, Łódź, and Katowice, and on par with or slightly ahead of Gdańsk and Kraków. However, compared to top-tier international hubs like Warsaw, Paris, and London, it is perceived as weaker. Interestingly, stakeholders consistently found it comparable to Berlin and Prague. This positions it as a strong regional player aiming to close the gap with European leaders.

Table 3.8.c. Comparative Perception of the Lower Silesian Ecosystem vs. Other Cities (% of Respondents, N = 133)

Stakeholder perception	Comparing with	Poznań	Łódź	Katowice	Gdańsk	Kraków	Praga	Berlin	Warsaw	Paris	London
	Investors	50.0%	55.6%	55.6%	40.0%	20.0%	33.3%	30.0%	30.0%	37.5%	33.3%
		30.0%	22.2%	33.3%	40.0%	60.0%	22.2%	60.0%	0.0%	12.5%	11.1%
		20.0%	22.2%	11.1%	20.0%	20.0%	44.4%	10.0%	70.0%	50.0%	55.6%
	Startups	70.3%	73.5%	71.4%	65.7%	62.5%	48.5%	36.8%	37.2%	35.7%	28.9%
		8.1%	8.8%	8.6%	20.0%	22.5%	24.2%	55.3%	0.0%	14.3%	10.5%
		21.6%	17.6%	20.0%	14.3%	15.0%	27.3%	7.9%	62.8%	50.0%	60.5%
	Aspiring Entrepreneurs	70.6%	44.4%	57.9%	38.9%	36.8%	33.3%	37.5%	30.0%	33.3%	42.9%
		17.6%	27.8%	26.3%	44.4%	47.4%	58.3%	50.0%	0.0%	25.0%	7.1%
		11.8%	27.8%	15.8%	16.7%	15.8%	8.3%	12.5%	70.0%	41.7%	50.0%
	Corporations	77.8%	87.5%	66.7%	66.7%	77.8%	33.3%	37.5%	44.4%	0.0%	25.5%
		22.2%	0.0%	33.3%	33.3%	11.1%	33.3%	62.5%	0.0%	50.0%	12.5%
		0.0%	12.5%	0.0%	0.0%	11.1%	33.3%	0.0%	55.6%	50.0%	62.5%
	Support Network	57.1%	71.4%	71.4%	66.7%	50.0%	33.3%	25.0%	25.0%	0.0%	12.5%
		28.6%	14.3%	14.3%	33.3%	37.5%	16.7%	62.5%	0.0%	25.0%	12.5%
		14.3%	14.3%	14.3%	0.0%	12.5%	50.0%	12.5%	75.0%	75.0%	75.0%
	Academia	66.7%	60.0%	50.0%	25.0%	16.7%	25.0%	0.0%	14.3%	25.0%	16.7%
		17.7%	20.0%	33.3%	25.0%	33.3%	50.0%	66.7%	0.0%	0.0%	0.0%
		16.7%	20.0%	16.7%	50.0%	50.0%	25.0%	33.3%	85.7%	75.0%	83.3%
	Public Support	100.0%	100.0%	85.7%	83.3%	71.4%	14.3%	0.0%	14.3%	0.0%	0.0%
		0.0%	0.0%	14.3%	16.7%	28.6%	42.9%	71.4%	0.0%	16.7%	14.3%
		0.0%	0.0%	0.0%	0.0%	0.0%	42.9%	28.6%	85.7%	83.3%	85.7%

HOW TO UNDERSTAND THE DATA IN THE TABLE:

The data shows the percentage of repondents who perceive their ecosystem as better (green), comparable (yellow), or weaker (red) for each stakeholder group. The colors offer a quick visual guide to perceived competitive strenghts and weaknesses.

Ranking the weaknesses and strengths

To build a comprehensive profile of the Lower Silesian Startup Ecosystem, it is crucial to understand both its competitive advantages and its limitations. Stakeholders were asked to identify the ecosystem's most significant strengths and its most pressing weaknesses. This analysis pinpoints the key challenges that must be addressed to unlock the ecosystem's full potential (Table 3.8.d.) and the core strengths that can be leveraged for growth (Table 3.8.e.).

Table 3.8.d. Ranked Weaknesses of the Lower Silesian Startup Ecosystem by Stakeholder Group

Ecosystem Weaknesses	Overall Rank	Rankings based on ratings by respective stakeholders						
		Investors	Founders	Aspiring Entrepreneurs	Corporations	Support Network	Academia	Public Support
Insufficient collaboration between startups and large corporations	1	4	2	5	3	4	6	1
Lack of sufficient later-stage / growth funding (Series A+)	2	1	4	9	1	1	5	2
Bureaucracy / Regulatory hurdles	3	9	6	2	3	2	1	2
Insufficient access to early-stage / seed funding	4	6	3	1	8	2	3	6
Need for more specialized support programs (e.g., Deep Tech, B2B Sales)	5	8	1	8	8	7	6	2
Lack of international visibility / connections	6	2	5	4	1	4	8	6
Weak connections between academia / research and startups	7	3	10	2	5	10	1	6
Need for more experienced mentors with scale-up experience	8	6	9	7	5	7	4	5
Fragmented ecosystem / Lack of central coordination/ information	9	9	7	5	5	7	9	9

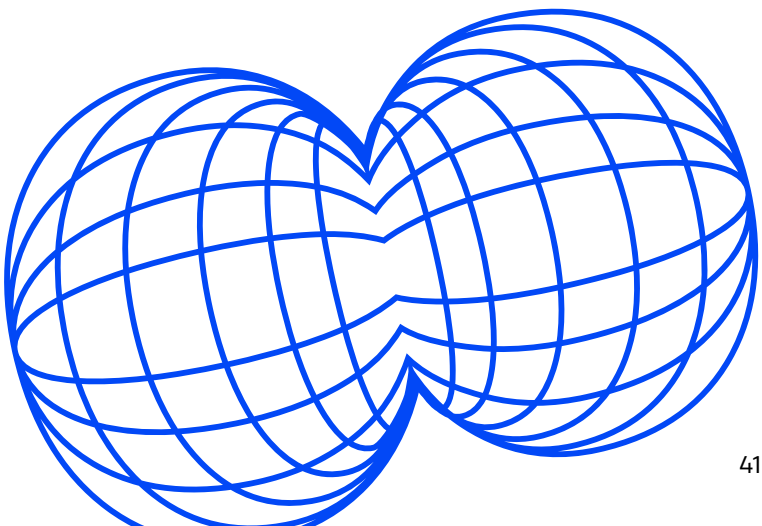
HOW TO UNDERSTAND THE DATA IN TABLES:

The tables rank the perceived importance of various factors based on how frequently they were mentioned by stakeholders. The "Overall ranking" reflects the total counts from all respondents, while each stakeholder column is ranked independently based on that group's specific responses. Therefore, a lower rank (e.g., 1, 2, 3) signifies a higher priority or a top-perceived factor for that group, a pressing weakness in Table 3.8.d., and a core strength in Table 3.8.e.

The ecosystem's primary weaknesses are a lack of corporate-startup collaboration and insufficient later-stage (Series A+) funding, which combine to create a significant "scale-up gap." Different stakeholders also face distinct challenges: Aspiring Entrepreneurs require more early-stage funding, while established Startups need more specialized support programs. Conversely, the ecosystem's universally recognized top strength is its strong pool of technical talent, complemented by a supportive startup community and high quality of life. Perspectives on other strengths diverge; for instance, Investors uniquely emphasize the growing number of VCs as a key asset, while Academia places a higher value on the presence of strong universities and corporations.

Table 3.8.e. Ranked Strengths of the Lower Silesian Startup Ecosystem by Stakeholder Group

Ecosystem Strenghts	Overall Rank	Rankings based on ratings by respective stakeholders						
		Inve-stors	Startups	Aspiring Entrepre-neurs	Corpora-tions	Support Network	Acade-mia	Public Support
Strong pool of technical talent	1	4	2	1	3	4	5	6
Active and supportive start-tup community / Networking opportunities	2	3	1	3	5	1	11	4
High quality of life / Attractiveness of the city for talent	3	4	7	1	1	2	5	1
Presence of strong universities and research institutions	4	4	4	5	5	4	1	1
Strong specialization in IT & Software Development)	5	10	5	4	3	7	1	9
Availability of incubators / accelerators / co-working spaces	6	7	3	7	10	2	5	4
Presence of large tech companies / Potential partners & clients	7	4	9	5	2	4	1	6
Support from local government / Public initiatives	8	7	5	9	10	9	5	1
Growing number of VCs / Angel investors based here	9	2	8	8	5	12	11	12
Prominence as a Business Services (BPO/SSC) center	10	7	13	9	9	9	5	6
Relatively lower operational costs compared to other major hubs	11	10	10	9	10	12	15	9
Advanced capabilities in Ma-nufacturing & Industry 4.0	12	12	15	14	5	8	11	9
Emerging as a hub for Heal-thtech & Biotech	13	13	10	12	13	12	5	5
Strength in other specialized industries	13	3	13	13	13	12	4	12



Contributing to United Nations Sustainable Development Goals

To evaluate the ecosystem's impact and priorities beyond purely economic indicators, stakeholders were asked about their contributions to the United Nations Sustainable Development Goals (SDGs), see Table 3.8.f. The analysis shows that Startups have stood out as the primary drivers of SDG contributions across a wide range of goals, particularly SDG 9 (Industry, Innovation, and Infrastructure), SDG 3 (Good Health and Well-being), and SDG 8 (Decent Work and Economic Growth). Other stakeholders demonstrate more specialized contributions. For instance, Academia has placed itself as a key contributor to SDG 4 (Quality Education) and plays a significant role in research-intensive goals like SDG 7 (Affordable and Clean Energy). The relatively low contribution reported by Investors across most SDGs may indicate an opportunity for the investment community to place a greater emphasis on impact-driven ventures.

Table 3.8.f. Perceived Contribution to UN Sustainable Development Goals (SDGs) by Stakeholder Group

	Stakeholders						
	Investors	Startups	Aspiring entrepreneurs	Corporations	Support Network	Academia	Public Support
1 NO POVERTY	0,0%	37,5%	12,5%	12,5%	12,5%	12,5%	12,5%
2 ZERO HUNGER	0,0%	55,6%	22,2%	11,1%	0,0%	11,1%	0,0%
3 GOOD HEALTH AND WELL-BEING	5,3%	52,6%	13,2%	5,3%	5,3%	13,2%	5,3%
4 QUALITY EDUCATION	9,4%	12,5%	12,5%	3,1%	21,9%	28,1%	12,5%
5 GENDER EQUALITY	5,9%	23,5%	0,0%	35,3%	0,0%	17,6%	17,6%
6 CLEAN WATER AND SANITATION	0,0%	35,7%	14,3%	7,1%	7,1%	35,7%	0,0%
7 AFFORDABLE AND CLEAN ENERGY	15,0%	10%	15,0%	10,0%	20,0%	30,0%	0,0%

	Stakeholders						
	Investors	Startups	Aspiring entrepreneurs	Corporations	Support Network	Academia	Public Support
8 DECENT WORK AND ECONOMIC GROWTH	3,4%	24,1%	20,7%	17,2%	13,8%	6,9%	13,8%
9 INDUSTRY, INNOVATION AND INFRASTRUCTURE	10,0%	37,1%	12,9%	7,1%	12,9%	11,4%	8,6%
10 REDUCED INEQUALITIES	0,0%	47,4%	10,5%	10,5%	10,5%	10,5%	10,5%
11 SUSTAINABLE CITIES AND COMMUNITIES	0,0%	34,4%	15,6%	9,4%	6,3%	18,8%	15,6%
12 RESPONSIBLE CONSUMPTION AND PRODUCTION	5,0%	35,0%	15,0%	10,0%	15,0%	15,0%	5,0%
13 CLIMATE ACTION	12,0%	36,0%	12,0%	8,0%	8,0%	16,0%	8,0%
14 LIFE BELOW WATER	0,0%	0,0%	0,0%	0,0%	0,0%	100,0%	0,0%
15 LIFE ON LAND	0,0%	50,0%	12,5%	0,0%	0,0%	37,5%	0,0%
16 PEACE, JUSTICE AND STRONG INSTITUTIONS	8,3%	50,0%	0,0%	0,0%	0,0%	25,0%	16,7%
17 PARTNERSHIPS FOR THE GOALS	0,0%	38,9%	5,6%	11,1%	11,1%	22,2%	11,1%

What are the USPs of the Lower Silesian Startup Ecosystem?

To distill the unique essence of the ecosystem, stakeholders were asked to describe the ecosystem's Unique Selling Propositions (USPs) in their own words. The following word cloud visualizes the most prominent themes from each stakeholder and their synthesized summary of their collective views. Across all stakeholder groups, a cohesive narrative emerges: the Lower Silesian startup ecosystem's core USP is its identity as a cost-efficient, talent-rich, and centrally located bridge connecting academia, industry, and capital for rapid international scaling. Investors value the robust city support, focused industry niches, and "bulls-eye" location between Berlin,

Prague, and Warsaw. Startups build on this by highlighting access to strong academic institutions, corporate partners, a burgeoning deeptech scene, and strategic proximity to DACH and CEE markets. Aspiring Entrepreneurs are drawn to the abundant skills, affordability, and international atmosphere. Corporations appreciate the city's compact, "one-stop" nature for multi-industry partnerships. Support Networks see their role as linking science and business through stable, tailored assistance. Academia contributes diverse specializations and a pipeline of university spinoffs. Finally, Public Support representatives emphasize the agile and integrative collaboration that fosters innovation.

- Investors
- Startups
- Aspiring Entrepreneurs
- Corporations
- Support Network
- Academia
- Public Support

Ecosystem Success Chat

From India to Poland: How Wrocław is funding a global bionic revolution

An Indian dreamer, a revolutionary prototype named Zeus, and the Polish city of Wrocław. This is the origin story of Aether Biomedical, a company poised to revolutionize the prosthetics market. This isn't just another success story; it's tangible proof that Poland, and specifically the support from a Wrocław-based fund, is a vital engine for global innovation. We have the potential and the space not only for domestic ventures but for international breakthroughs. We believe this venture is another crucial building block in creating an innovation ecosystem that reaches all the way to India.

THE INVESTOR'S PERSPECTIVE

I first met Aether Biomedical a few years ago when they were participating in the Brinc Accelerator program, where I served as a mentor. Even then, it was clear that they were aiming very high, Dhruv Agrawal was barely 20 years old and attempting to enter the extremely demanding market of bionic prostheses. It was a brave bet on our part - an investment in a very young founder who simultaneously had to manage complex technology, medical regulations, and a global scale of operations.

I remember at the start of the acceleration, I outlined milestones for Dhruv - implementing successive prototype functionalities, gathering feedback from local prosthetic centers, and recruiting a team. He over-delivered on all of them, showing that a lack of contacts, unfamiliarity with the language, or young age do not have to be barriers when one possesses such extraordinary determination and a rapid learning curve. That is what convinced us.

Today, Zeus is winning because it combines advanced biomechatronics with product thinking. It stands out for its very high grip force-to-weight ratio, a flexible system of replaceable modules (which shortens service time from weeks to hours), and the ability to individually map each user's EMG signals. This significantly shortens rehabilitation and results in more fluid and natural movement control than with competing prostheses. It is no longer just medical equipment. It is a platform that can be updated and customized.

Following our investment, Aether was joined by excellent partners and VC funds: Sunfish Partners, Chiratae Ventures, Joyance Partners, Story Ventures, J2 Ventures, and Avivo Capital, each of whom contributed significant value at the right stage of the company's development. Aether has already raised over $10 million in equity rounds and received prestigious research grants that enabled technology development and obtaining key certifications.

Aether's current achievements are a credit to the fantastic team built by Dhruv, and I am convinced that this is only the beginning of their story.

Maciej Frankowicz

Wrocław-based investor

Partner at the Venture Capital funds Hard2beat and Shape VC. Over the last 10 years, he has completed more than 40 investments in early-stage technology companies such as Scanye, AdTonos, Aether Biomedical, and Surveily. He is the Chairman of the Supervisory Board at Scanway SA.

THE STARTUP'S PERSPECTIVE

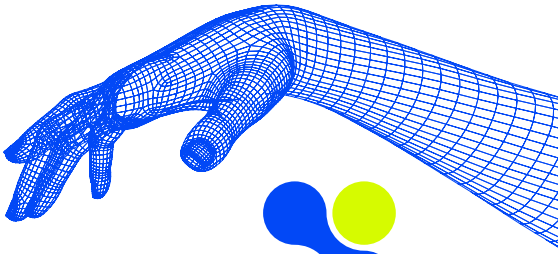
The story of Aether Biomedical began a few years ago when I was a medical student in India—but I was much more drawn to technology than to clinical work. For my 18th birthday, I received a 3D printer and started experimenting—printing components, assembling primitive hand prostheses, and testing them with amputees. That's when I first saw the enormous gap between the need for and the availability of modern prosthetics—millions of people worldwide cannot afford a functional prosthetic hand.

Together with my friend, Faith Jiwakhan, we decided to do something about it. We dropped out of university and started a project called Zeus in a small dorm room, our first prototype of a bionic hand controlled by muscle signals (EMG). We had no experience, just passion and the belief that we could create something that would truly change people's lives, not just look impressive in a laboratory.

The turning point was 2019 when we decided to relocate to Poznań. We secured funding from the Poland Prize program and soon after, an investment from Shape.VC. Poland gave us something that was difficult for us to access in India - excellent engineers, research grants, and access to the vast European market. We built a multidisciplinary team that helped us turn sketches into a world-class medical product.

Today, Zeus weighs just 570 grams, generates a grip force of about 150 N, offers 14 grip modes, and can be easily serviced thanks to its modular design and 3D-printed components. We have obtained ISO 13485 and PDAC certifications, which allow us to sell our prostheses across Europe and in the USA. Our hands are now used by over a thousand people in 26 countries. Aether currently employs over 70 people worldwide, with Poland serving as the base for our entire research, development, and production division.

Looking back, I see that our success is not just about technology—it's the result of determination, empathy, and the courage to move thousands of kilometers from home in pursuit of a mission. We wanted advanced prostheses to be accessible to everyone—and we continue to fight every day to make that dream a reality.



Dhruv Agrawal

CEO of Aether Biomedical

CEO and President of the management board of Aether Biomedical Sp. z o.o. He studied Medicine at Vardhmann Mahavir Medical college and Safdarjung hospital, New Delhi before dropping out to pursue a bachelors in business management. He also has a post graduate diploma in medical device development regulatory affairs from University of California, Irvine, and a masters in data science from the University of London.

Under his leadership, Aether Biomedical has achieved CE certification and FDA registration for the Zeus V1 bionic limb and established distribution across 9 European countries, the US, and India. Additionally, Aether has raised over 12 million USD in private capital from leading VCs and has been part of multiple European grants and research programs for an additional 6.5M USD in nondilutive capital.

Founders and startups in Lower Silesia

This section showcases data-driven snapshot of the Lower Silesian startup ecosystem, blending the data from the "Map of the Polish ecosystem" created by Dealroom and PFR (hereby referred to as data from Dealroom+PFR), with direct survey responses from regional founders. This section visualizes one of the key stakeholders of the ecosystem: the founders, their ventures, and their performance and needs.

Founders' DNA: The people building Lower Silesia's future

The foundation of the Lower Silesian startup ecosystem is built upon a dynamic and growing community of entrepreneurs. An analysis of the regional landscape reveals a core group of unique founders and startups that are actively shaping its trajectory. This figure serves as the baseline for understanding the composition, experience, and geographic distribution of the talent driving innovation in the region. These carefully approximated numbers are deduced from analysing the database of 540 people available from Dealroom+PFR.

513

Unique Founders

302

Unique Startups

FOUNDING TEAM SIZE

The structure of a founding team is a critical factor in a startup's journey. To understand the typical team composition in Lower Silesia, the survey asked founders about the size of their founding teams, with the results presented in Figure 4.1.a. The survey data reveals that collaborative founding teams are the norm in Lower Silesia, with almost 78% of the respondents indicating that they founded the startup with at least two members. Smaller number of larger founding teams reflects challenges of managing equity and alignment as team size increases.

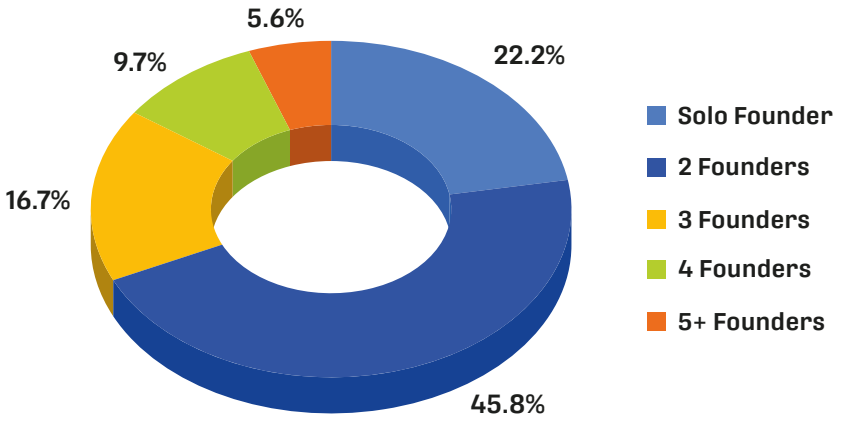


Figure 4.1.a. Founding team size distribution based on N=72 respondents from as many startups.

FOUNDERS' AGE GROUPS

In the survey, N=73 Startups participated and indicated the distributions of 163 founders/co-founders, shown in Figure 4.1.b. The respondent had the option to indicate how many founders/co-founders belonged to each age group. The dominant age group was found to be 35-44 years, which indicates that founders prefer to get some professional experience before venturing on to their entrepreneurial journey. Interestingly, no co-founders below the age of 18 were indicated in the survey.

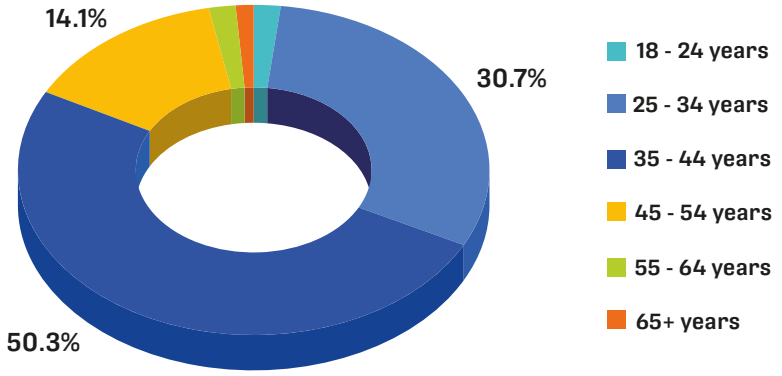


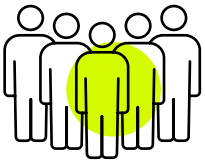
Figure 4.1.b. Age distribution of founders (Survey data from N=73 startups, representing 163 founders).

A PERSISTENT GENDER IMBALANCE

Like many global tech hubs, the ecosystem exhibits a significant gender gap in founding teams, representing a major untapped potential for growth and diversity of thought. Analysis of the 513 founders from Dealroom+PFR data shows that there is approximately:

1 woman founder

among



14.66 founders

In the survey, the respondents (N=72) indicated the following founding team gender composition, which also points to a significant gender imbalance. In the survey about 3% respondents preferred not to disclose the gender composition of the founding team. Further the cross-tabulation in Table 4.1.a reveals that the gender imbalance persists across different team sizes. All-male teams are most prevalent in two-person startups and single-founder startups. Mixed-gender teams are also most common in the two-founder configuration. Notably, all-female teams were only reported in solo and two-person startups in this survey sample.

65%
All male

4%
All female

28%
Both male and female

Table 4.1.a. Cross-tabulation of founding team gender composition and team size (N=72, survey data)

Gender composition	Founding team size				
	1	2	3	4	5+
All female	2	1	0	0	0
All male	11	23	8	1	3
Both male and female	2	8	4	6	1
Prefer not to say	1	1	0	0	0

FOUNDERS' GEOGRAPHIC LOCATION

The ecosystem is centered in Wrocław, but its network of founders is geographically dispersed, indicating both local roots and international connections. The Dealroom+PFR data of 513 founders was analyzed to determine their locations, as shown in Figure 4.1.c. The vast majority of founders are located in Lower Silesia, underscoring the region's central role. Significant numbers of founders are also based in other Polish cities, with Warsaw being a key hub. The ecosystem also has an international reach, with founders located in the USA and the UK. Other international locations for founders include Switzerland (6), Asia (6), Germany (5), Ukraine (3), Saudi Arabia (3), Italy (3), and several other countries with one or two founders each.

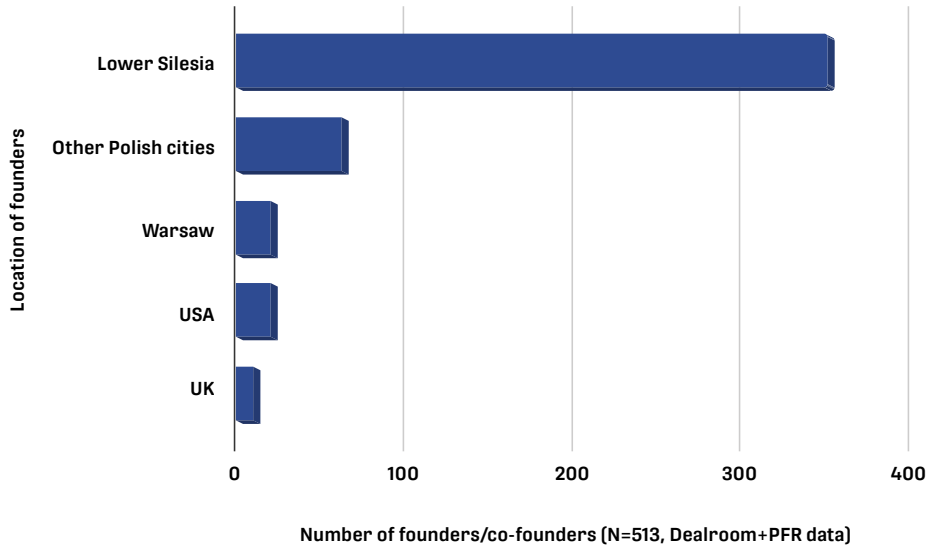


Figure 4.1.c. Geographic location of founders in the Lower Silesian ecosystem.

LOWER SILESIAN TALENT POOL FUELING THE ECOSYSTEM

Majority of the survey respondents (N=65) indicated that they were already in Lower Silesia as shown in Figure 4.1.d. This indicated that, as highlighted in the previous sections, Lower Silesian talent pool is a major USP of the ecosystem. However, this also suggests a potential weakness in marketing the region as a premier destination for external founders, which could limit the influx of new perspectives and experiences essential for long-term global relevance.

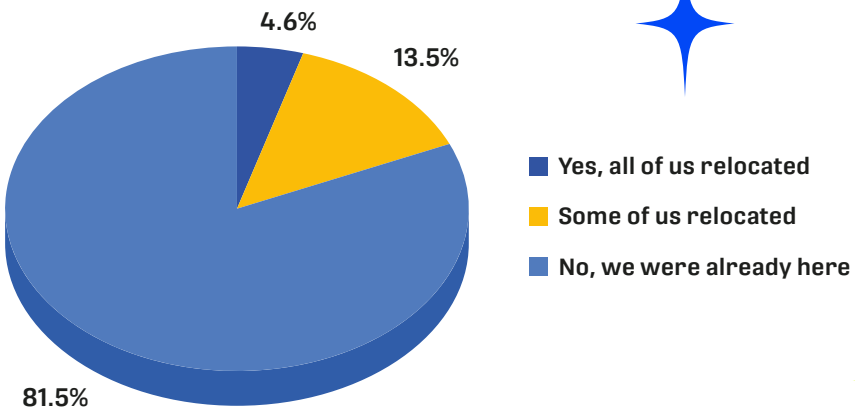


Figure 4.1.d. Founder relocation status for starting their venture (N=65, survey data)

FOUNDERS' EXPERIENCE SPECTRUM

The track record of its founders is a leading indicator of an ecosystem's potential. Data from Dealroom+PFR provides insights into the professional background and experience level of founders. Dealroom assesses "Founder strength" by evaluating credentials, prior roles at successful companies, and previous entrepreneurial experience. Based on this data:

1 out of 20 is an exceptional founder

2.2 in 10 are strong founders

2.3 in 10 are serial founders

1 in 10 founder has worked with a unicorn

This experience is not just theoretical. Survey data shows that over half of the responding startups have founders with prior entrepreneurial experience. Collectively, they have founded 5.95 startups on an average with a standard deviation of 15.69, indicating a deep well of practical, hands-on knowledge being reinvested into the ecosystem.

40 out of 70

respondents indicated that their founder(s) have previously founded startup(s).

238

startups have been founded by the founders indicated by the 40 respondents.

EMPLOYMENT STATUS OF FOUNDING TEAM

Understanding the level of commitment founders have to their startups is key to assessing the ecosystem's maturity. A founder's employment status, whether full-time or part-time, offers a glimpse into a venture's stage, funding level, and the founder's personal risk calculus. The survey explored whether founders are working full-time, part-time, or a mix. Analysis in Figure 4.1.e. Shows a varied level of commitment, and distribution suggests that a significant number of ventures are in their early stages, where founders may still be transitioning from other professional roles.

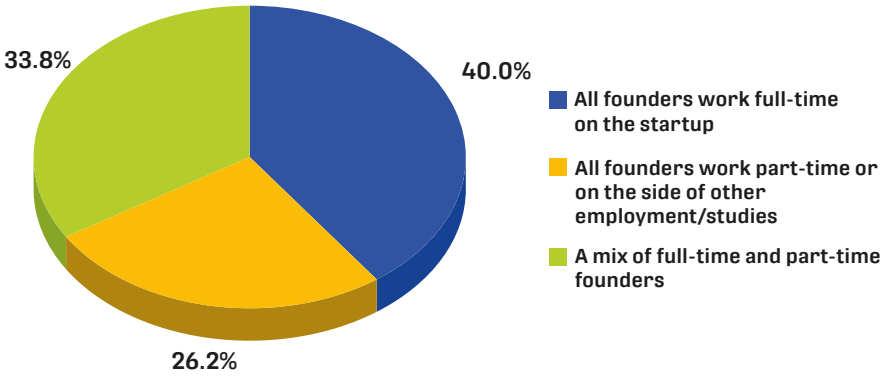


Figure 4.1.e. Employment status of founding teams (N=65, survey data)

CURRENT NUMBER OF EMPLOYEES

The size of a startup's team is a direct indicator of its growth and operational scale. Survey respondents were asked for the current number of employees, including founders, on a full-time equivalent basis, see Figure 4.1.f. The data portrays an ecosystem with a very wide "base of the pyramid," rich in early-stage ventures. The key challenge for the ecosystem, reflected in this distribution, is to provide the necessary support, in funding, talent, and mentorship, to help these young companies navigate the critical transition from the 2-4 person stage to becoming scalable employers in the 11-50+ brackets.

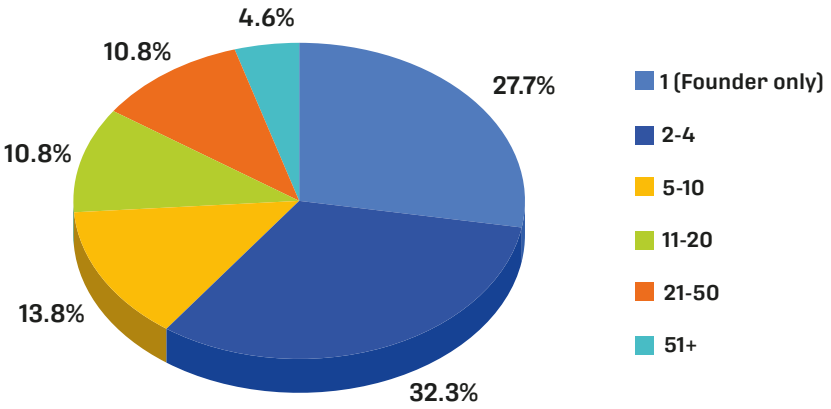


Figure 4.1.f. Distribution of startups by number of employees, including founders (N=65, survey data)

EMPLOYEES ON TECHNICAL ROLES

The allocation of human capital, particularly the balance between technical and non-technical roles, reveals a startup's strategic priorities. The ecosystem is fundamentally tech-driven, many startups demonstrate mature understanding of balanced team composition, see Figure 4.1.g. This suggests an early appreciation for complementing product development with crucial business functions like sales, marketing, and operations.

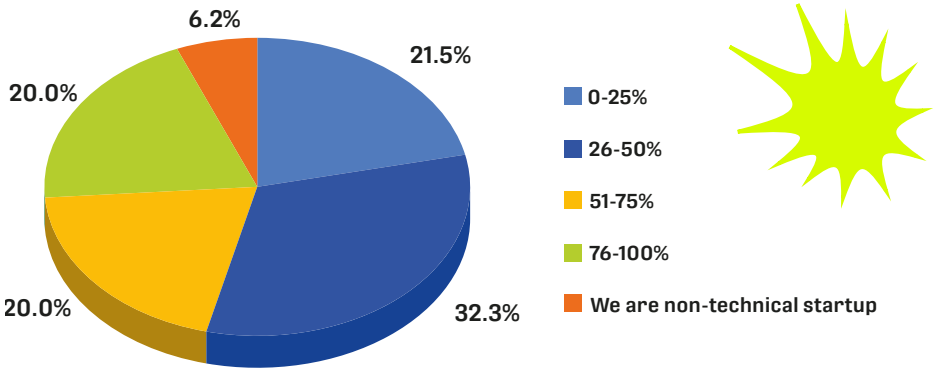


Figure 4.1.g. Percentage of employees in technical roles within startups (N=65, survey data)

REMOTE WORK AFFECT

The post-2020 shift to remote work has reshaped the global talent market, creating both opportunities and threats for regional ecosystems. For Lower Silesian startups, remote work is an important aspect to understand. For the nearly 37% reporting a positive impact, it has democratized talent acquisition, opening up national and global candidate pools, Figure 4.1.h. However, for 11% there is a negative impact, as it has facilitated an intensified competition for talents, forcing them to compete on salary with bigger ecosystems and international companies hiring remotely. This highlights that new hiring landscape where startups must leverage new found flexibility while battling heightened competition.

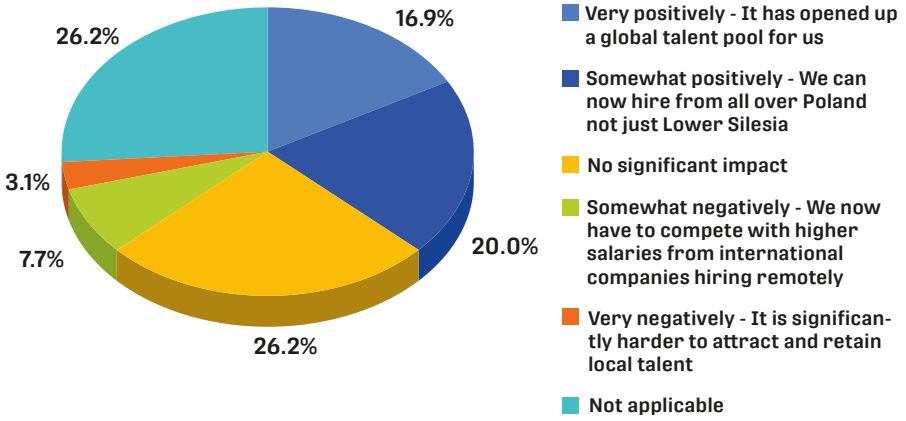


Figure 4.1.h. Perceived impact of the shift to remote work on hiring talent (N=65, survey data)

MOST DIFFICULT ROLES TO FILL IN LOWER SILESIA

Hiring challenges are a direct reflection of an ecosystem's talent gaps and evolving needs. This data pinpoints the most acute pain points for scaling startups, see Figure 4.1.i. The demand for sales and business development is the most pressing issue, a classic sign of startups ready to commercialize but lacking the expertise to do so effectively. On the other hand, over one third of the respondents indicating having no hiring difficulty reflects highly positively on the ecosystem talent pool.

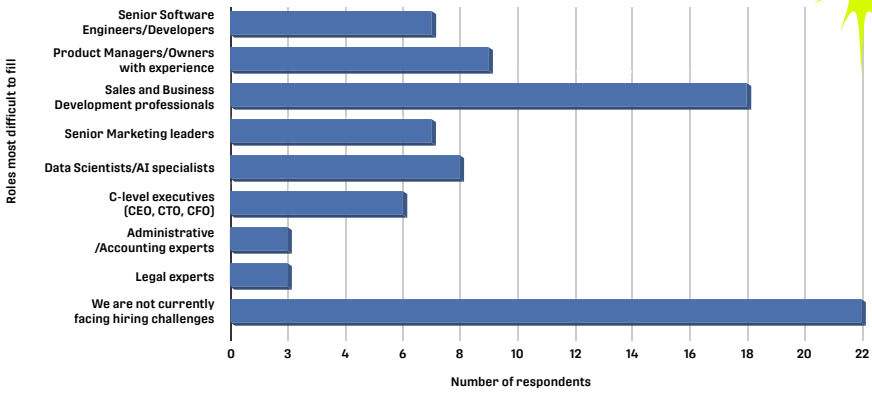


Figure 4.1.i. Roles identified as most difficult to fill by Lower Silesian startups (N=65, survey data)

AREAS FOUNDERS ARE LOOKING TO IMPROVE

Founders' self-identified skill gaps provide a roadmap for ecosystem support programs and highlight the collective mindset of the region's entrepreneurs, see Table 4.1.b. The learning priorities of founders directly mirror the ecosystem's hiring challenges, revealing a strong focus on commercialization. The overwhelming demand for skills in sales, digital marketing, and international expansion shows a clear and collective ambition to translate technical products into global revenue. This focus on business execution over technical skills (like Agile or UX/UI) suggests that founders feel more confident in their ability to build products than in their ability to sell them. This is a critical insight for accelerators, mentors, and investors looking to provide maximum value.

Table 4.1.b. Top areas for skill development as identified by founders, broken down by their primary role (N=58, survey data)

Areas founders looking to improve	Total	Primary role in startup			
		CEO/Managing Director	CTO/Technical Lead	COO/Operations	Others
Advanced Sales Techniques / B2B Sales	26	22	2	1	1
Digital Marketing / Growth Hacking	18	13	0	0	5
International Expansion Strategy & Execution	18	12	1	1	4
Financial Modelling & Management for Startups	16	11	2	0	3
Building & Leading High-Performing Teams	14	12	0	1	1
Fundraising / Pitching to Investors	13	5	1	2	5
PR & Communications for Startups	13	8	1	2	2
Navigating Public Grants & Funding	12	6	2	2	2
Legal Aspects (Term sheets, SHA, ESOP)	5	4	0	0	1
Agile Product Development / Management	5	1	1	0	3
User Experience (UX) / User Interface (UI) Design	4	3	0	0	1

Lower Silesian Unicorns

CCC

B2C fashion; Footwear and accessories

This retail powerhouse has successfully bridged the gap between traditional commerce and the digital age, establishing a dominant presence across Central Europe. By integrating its vast network of physical stores with an online platform, the company offers a seamless omnichannel experience. CCC has also recently acquired MODIVO based at Zielona Góra, Poland.

KEY METRICS

- Valuation: **$4.4 Billion**
- Launched: **1999**
- Team size: **3,500 employees** (28% 12-mo growth)
- Type: **E-commerce and marketplace**
- Revenue: **$2.6 Billion**
- Hiring now: **91 open roles** in purchasing, design, and more
- HQ: **Polkowice, Poland**
- Status: **Operational**

Ecosystem pillar

With an IPO in 2004 and a €850M post-IPO debt round, CCC is a foundational company of the region's public market.

Text

B2B marketing; CRM and sales

This company provides a crucial toolkit for global businesses seeking to enhance their digital presence and foster direct customer engagement. Its platform simplifies the complexities of real-time online communication, making sophisticated sales and support capabilities accessible to a wide audience. Having navigated the journey from a successful public offering to a major acquisition, its story serves as a benchmark for local startups aiming for a significant impact on the international stage.

KEY METRICS

- Valuation: **$880 Million**
- Launched: **2002**
- Team size: **378 employees** (12% 12-mo growth)
- Type: **Subscription SaaS**
- Revenue: **$78.9 Million**
- Founder factory: At least one alumnus has gone on to found a company that **raised over $10M.**
- HQ: **Wrocław, Poland**
- Status: **Acquired**

Acquisition success

Acquired after a successful PLN 476M IPO in 2014, showcasing a strong trajectory from startup to major exit.

Techland

B2C gaming; Console and PC gaming

As an independent studio for decades, this company built a global reputation by creating critically acclaimed and best-selling original franchises from the ground up. The studio is celebrated for its mastery in crafting immersive experiences for PC and console players, including the global hits *Dying Light* and *Call of Juarez*.

KEY METRICS

- Valuation: **$2.2 Billion**
- Launched: **1991**
- Team Size: **638 employees** (9% 12-mo growth)
- Type: **Subscription**
- Major exit: **Acquired in a $1.5 Billion deal**
- Founder factory: A key talent incubator, with two founder alumni **raising over $10M** for their own ventures
- HQ: **Wrocław, Poland**
- Status: **Acquired**

Industry pioneer

As one of Poland's oldest independent game studios, Techland's decades of continuous operation and global success laid the groundwork for the entire Lower Silesian gaming ecosystem, proving the region's potential on the world stage long before it became a recognized tech hub.

Ten Square Games

B2C gaming; mobile gaming, console and PC gaming

This developer has achieved remarkable success by transforming traditional hobbies like fishing and hunting into engaging, free-to-play digital simulations. The studio's focus on a specialized niche has allowed it to build dedicated global communities around its 3D mobile and browser-based titles. By prioritizing accessible gameplay, the company has proven the power of serving passionate audiences with high-quality, specialized content.

KEY METRICS

- Valuation: **$108 Million**
- Launched: **2011**
- Team Size: **272 employees** (-8% 12-mo growth)
- Type: **Hardware, 3D technology, mobile app**
- Revenue: **$94.3 Million**
- Hiring now: **10 open roles** for artists, data scientists, and developers
- HQ: **Wrocław, Poland**
- Status: **Operational**

Technological focus

The company's success is built on a deep investment in advanced technology. By specializing in 3D simulation and integrating hardware-specific features into its mobile apps, it delivers a uniquely immersive and realistic experience for hobbyist gamers worldwide.

The venture blueprint

This section provides a comprehensive analysis of the startups that form the backbone of the Lower Silesian ecosystem.

It discusses the characteristics, market ambitions, and structural foundations of the startups in the region. The data used in this section is primarily from the survey run by Startup Wroclaw, and also supporting data from the "Map of the Polish ecosystem" created by Dealroom and PFR (herein referred to as Dealroom+PFR data). Some key numbers related to startups are:

283
Funded startups (Dealroom+PFR data)

6
Startups have at least one registered patent

73
Startups participated in the survey (56 complete + 17 partially complete responses)

Note on data analysis: The data presented in this section is derived from a survey of 73 startups, which includes 56 fully completed and 17 partially completed responses. Please note that not all participants answered every question. Therefore, the sample size, denoted as 'N', varies across the tables and figures. Each 'N' value reflects the precise number of valid responses for the specific question or data set being analyzed, ensuring the accuracy of each individual analysis.

Dominant startup sectors

The Lower Silesian startup ecosystem demonstrates a vibrant and diverse sectoral landscape, with a clear orientation towards technology-driven industries.

Numerous sectors are represented, while a few key areas have emerged as clusters of significant activity and innovation. Figure 4.2.a. illustrates the distribution of startups across the top 25 sectors. There is a strong concentration in Medtech and Healthtech, which stands out as the leading sector. This is closely followed by a robust presence in AI/Machine Learning and Fintech/Insurtech, highlighting the region's strength in high-growth, knowledge-intensive fields. The ecosystem is further diversified with a significant number of ventures in areas such as Smart City, IoT, and DeepTech, underscoring a broad technological focus.

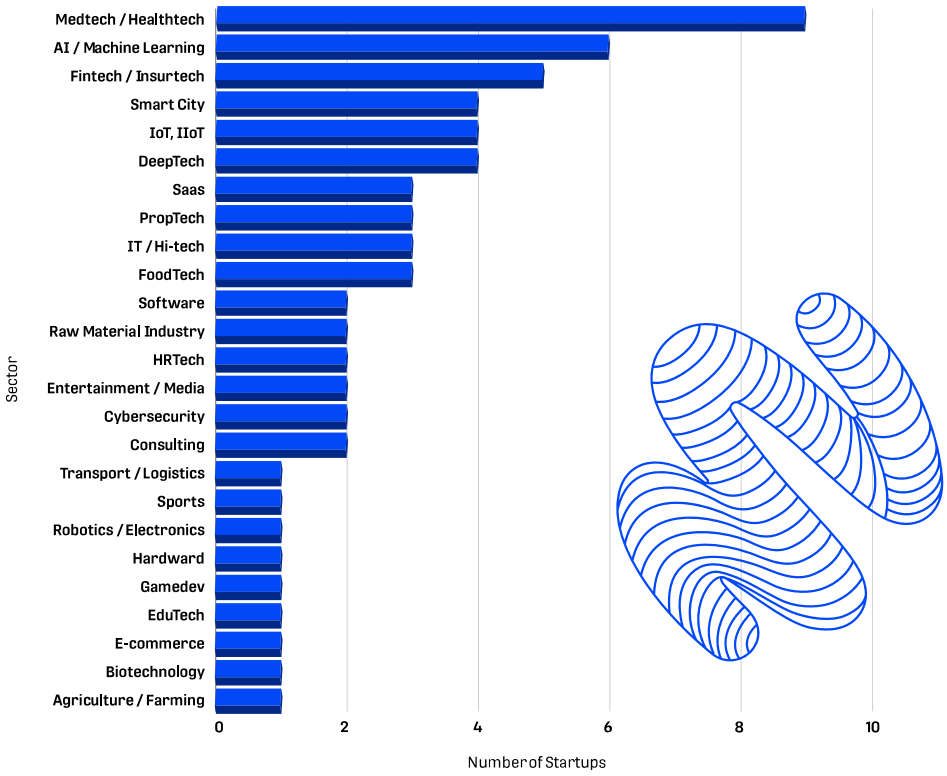


Figure 4.2.a. Top 25 sectors startups of Lower Silesia work in (N=66, survey data)

Legal forms of the startups in the region

The legal structure chosen by a startup is a critical decision that impacts its governance, funding opportunities, and liability.

In Lower Silesia, there is a clear preference for a specific corporate form that aligns with the typical needs of a growing venture. The vast majority of surveyed startups operate as a Limited Liability Company. This preference is likely due to the liability protection it offers founders, separating personal assets from business debts, which is a crucial consideration for high-risk ventures. Apart from joint-stock and sole proprietorship, a few startups have also adopted alternative structures like the Simple Joint-Stock Company (Prosta spółka akcyjna - P.S.A.), Limited Partnership (Spółka komandytowa), and a Foundation with business activities (Fundacja z działalnością gospodarczą), reflecting the diverse needs of the ecosystem.

47
Limited Liability Company
(Spółka z ograniczoną odpowiedzialnością - Sp. z o.o.)

9
Joint-Stock Company
(Spółka akcyjna - S.A.)

9
Sole Proprietorship
(Jednoosobowa działalność gospodarcza - JDG)

Geographic locations of registration

The administrative home of a startup provides insight into the ecosystem's ability to retain its ventures.

The data indicates that the Lower Silesian ecosystem is not just a place of operation but also the formal registration hub for the majority of its startups. A smaller cohort of 11 startups is registered in other Polish voivodeships, indicating a degree of national integration. The ecosystem also shows early signs of international appeal, with a few companies registered abroad in countries like India and Turkey.

56
Registered in Lower Silesia

11
Registered in Poland outside Lower Silesia

3
Registered outside Poland

3
Not yet registered

Primary geographic target markets of startups

Lower Silesian startups are ambitious and distinctly international, thinking beyond domestic borders from the outset. Table 4.2.a. details the geographic regions targeted by the surveyed startups. Poland remains the most immediate and primary market for the majority of companies, but there is a powerful outward-looking orientation. The Western European Region (WER) and the Central and Eastern European (CEE) region are the next most popular targets, demonstrating a strong focus on the broader European continent. Furthermore, a significant number of startups are targeting the highly competitive United States (US) market and are building for a Global audience, signaling a high level of ambition and confidence within the ecosystem.

Table 4.2.a. Target geographic markets of Lower Silesian startups (N=65, survey data)

	Geographic target market									
	Lower Silesia	Poland	CEE	WER	US	UK	Asia	Africa	South America	Global
No. of Startups	11	46	19	23	11	10	8	2	2	16

Geographic target markets across startup development stages

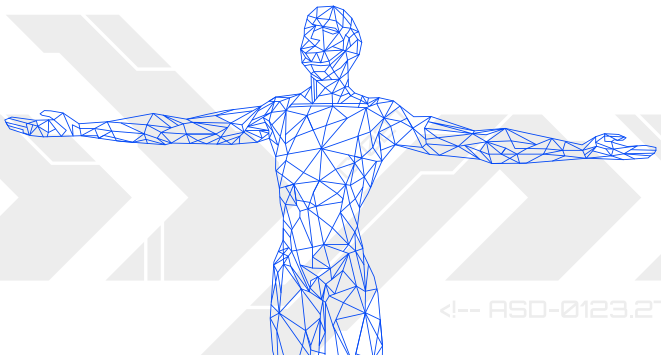
A startup's target market often evolves as it matures, moving from a local focus to a broader international scope.

This section examines the relationship between Lower Silesian startups' stage of development and its geographic market ambitions. Table 4.2.b. provides a cross-tabulation of startup stage and target market. The data indicates a clear pattern: startups in the initial development stages are predominantly focused on securing their position within the Polish market. As they mature their focus expands significantly towards international markets, particularly the CEE and Western European regions, alongside a growing ambition to enter the US market. This suggests that internationalization is a key component of the scaling strategy for Lower Silesian ventures.

Table 4.2.b. Primary geographic target market by startup stage (N=65, survey data)

		Main geographic target market									
		Lower Silesia	Poland	CEE	WER	US	UK	Asia	Africa	South America	Global
Stage of the startup	Idea Stage (Pre-product, defining concept)	0	3	0	0	0	0	1	0	0	2
	MVP Development (Building the minimum viable product)	2	11	2	5	1	2	0	0	1	2
	MVP Launched / Early Traction (Product launched, initial users/ feedback)	3	10	9	8	5	3	3	0	0	4
	Product-Market Fit (Validated product, growing user base, initial revenue)	3	11	1	4	3	3	1	1	2	4
	Growth Stage (Scaling operations, marketing, and sales)	3	9	5	4	2	2	3	0	0	2
	Mature Stage (Established market presence, optimizing profitability)	0	2	2	2	0	0	0	1	0	2

To further understand the complex combinations of markets that startups target, Figure 4.2.b provides a visual breakdown. This chart displays not only which individual markets are popular but also which specific combinations of markets are most common among the surveyed companies. A guide to interpreting the figure is provided below.



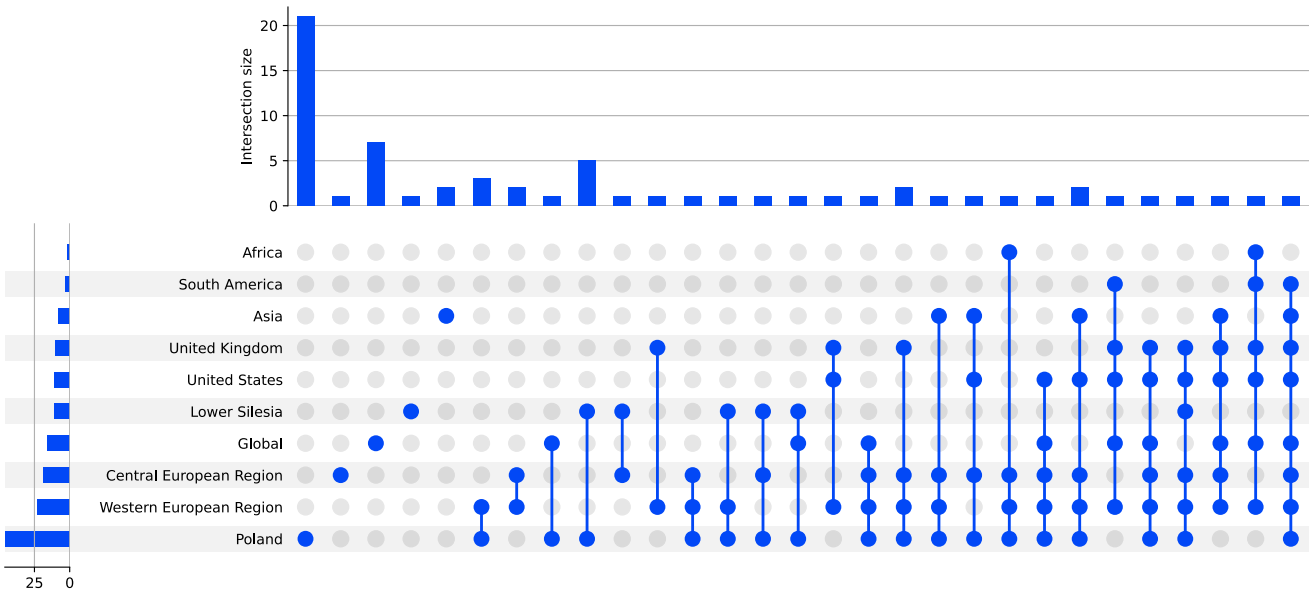


Figure 4.2.b. Combinations of geographic target markets for Lower Silesian startups (N=65, survey data)

HOW TO READ AND UNDERSTAND THIS FIGURE:

This is an Upset plot, and is used to visualize the intersections of different sets.

- **Horizontal Bars (Set Size):** The bars on the far left represent the total number of startups that target each individual geographic region shown.
- **Vertical Bars (Intersection Size):** The bar chart at the top shows the number of startups in each specific combination of target markets. The height of the bar corresponds to the number of startups.
- **Dot Matrix (Combinations):** The grid of dots below the top bar chart indicates which regions are included in each combination. A single, isolated dot under a bar means the number corresponds to startups targeting only that one region. Dots connected by a vertical line indicate a combination of markets.
The bar above them shows how many startups target that specific group of regions simultaneously.

Startup maturity, age, and team composition

The journey of a startup from an initial idea with the founding team to a mature company is reflected in its age and its stage of development.

Table 4.2.c. provides a detailed look at how these characteristics correlate with the different stages of development for startups in Lower Silesia. The data generally aligns with expected startup growth patterns. Early-stage startups are typically less than two years old and are run by small teams of one to three founders. In the higher growth stages, such as Product-Market Fit and Growth Stages, there is a noticeable increase in both their age and founding team size, with many being between 3-7 years old and having larger teams to manage scaling operations. It is interesting to note some outliers, such as startups that remain in the idea phase for several years, which may indicate pivots or complex R&D cycles.

Table 4.2.c. Characteristics of Lower Silesian startups by development stage (N=72, survey data)

Stage of the startup	Years since founding	Founding team size	No. of cases.
Idea Stage (Pre-product, defining concept)	Less than 1 year	2	3
		1	1
	3-4 years	1	1
	8+ years	1	1
MVP Development (Building the minimum viable product)	Less than 1 year	1	1
		2	1
		3	1
	1-2 years	2	3
		3	1
		4	1
	3-4 years	1	1
		2	1
	5-7 years	1	1
		2	1
		3	1
	8+ years	1	1

Table 4.2.c (continued). Characteristics of Lower Silesian startups by development stage (N=72, survey data)

Stage of the startup	Years since founding	Founding team size	No. of cases.
MVP Launched / Early Traction (Product launched, initial users/feedback)	Less than 1 year	1	1
		2	1
		4	1
	1-2 years	2	2
		3	1
	3-4 years	2	3
		3	2
	5-7 years	4	2
	8+ years	4	1
Product-Market Fit (Validated product, growing user base, initial revenue)	Less than 1 year	1	1
		2	1
	1-2 years	2	6
		1	2
		5+	1
	3-4 years	1	2
		3	1
		5+	1
	5-7 years	4	1
		5+	1
Growth Stage (Scaling operations, marketing, and sales)	1-2 years	2	3
		1	1
	3-4 years	1	1
	5-7 years	2	5
		3	2
	8+ years	3	3
		2	1
		5+	1
Mature Stage (Established market presence, optimizing profitability)	8+ years	2	2
		4	1
		1	1

HOW TO READ AND UNDERSTAND THE DATA IN TABLE 4.2.C.:

The table is organized by the startup's development stage. For each stage, it breaks down the number of companies based on their age ("Years since founding") and the size of their "Founding team size." The "No. of cases." column indicates how many startups fall into each specific sub-category. For example, within the "Growth Stage," there are 5 startups that are 5-7 years old and have a founding team of 2.

Primary and other customer segments

Understanding who a startup serves is fundamental to analyzing its market position.

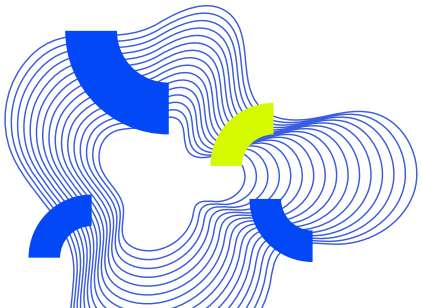
This section explores the primary customer models adopted by the surveyed Startups, revealing a strong business-to-business (B2B) orientation within the ecosystem. Table 4.2.d. outlines the different customer segments targeted by the startups. While B2B is the predominant focus, many startups employ a hybrid approach, serving multiple customer types simultaneously. For instance, a significant number of B2B-focused companies also cater to B2C or B2G clients, indicating a flexible and opportunistic approach to market capture. Pure B2C, B2G, and C2C models are present but represent a smaller portion of the ecosystem.

Table 4.2.d. Primary and secondary customer segments (N=65, survey data)

		Secondary target customers				
	Primary Total	B2B (Large Enterprises)	B2B (SMEs)	B2C	B2G	C2C
Business to Business (B2B - Large Enterprise)	11	10	8	3	3	0
Business to Business (B2B - Small and Medium Entreprises)	31	13	25	7	2	0
Business to Consumer (B2C)	13	1	5	11	2	0
Business to Government (B2G)	3	1	0	0	2	0
Customer to Customer (C2C)	1	0	0	0	0	1
B2B and B2C	5	5	4	5	1	0
B2B and B2G	1	0	1	0	1	0
Total (N)	65					

HOW TO READ AND UNDERSTAND THE DATA IN TABLE 4.2.D.:

The "Primary Total" column indicates the number of startups that identified the customer type in that row as their main focus. The columns to the right detail the target customer overlaps. For example, in the second row, 27 startups stated their primary customer is B2B (SMEs). Of those 27 startups, 13 also serve Large Enterprises, 7 also serve B2C customers, and 2 also serve B2G customers.



Next, this part shows how the choice of a primary target customer correlates with the different development stages of startups in the Lower Silesian ecosystem.

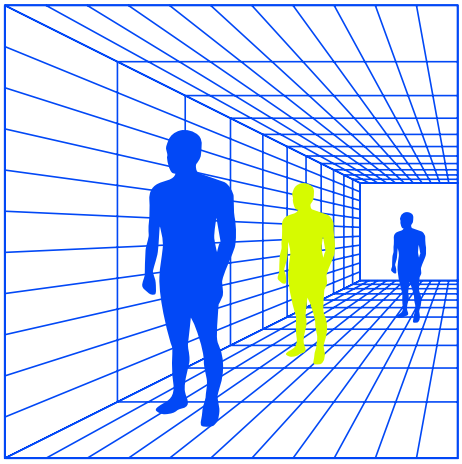
Table 4.2.e below cross-tabulates these two variables, revealing distinct patterns in market focus over a startup's lifecycle. The data shows that B2B (SMEs) is the most dominant primary customer segment across nearly all stages, especially for startups in the MVP Development, Early Traction, Product-Market Fit, and Growth phases. A focus on B2C customers is most prominent during the MVP Development stage, suggesting that B2C models are a common starting point for validation before a potential pivot or expansion. Conversely, targeting large B2B (Enterprises) becomes more common as startups mature, particularly in the Growth and Mature stages, which aligns with the need for larger contracts to fuel expansion.

Table 4.2.e. Primary target customer by startup development stage (N=65, survey data)

	Primary target customers							Total
	B2B (Enterprise)	B2B (SMEs)	B2C	B2G	C2C	B2B and B2C	B2B and B2G	
Idea Stage	1	2	0	0	0	0	1	4
MVP Development	1	6	5	1	0	1	0	14
MVP Launched / Early Traction	2	7	2	1	0	1	0	13
Product-Market Fit	2	6	2	1	0	1	0	12
Growth Stage	3	9	4	0	0	2	0	18
Mature Stage	2	1	0	0	1	0	0	4
Total	11	31	13	3	1	5	1	**65**

HOW TO READ AND UNDERSTAND THE DATA IN TABLE 4.2.E.:

The table cross-tabulates the startup's development stage (rows) with its primary target customer (columns). Each cell shows the number of startups at a specific stage that primarily target a specific customer segment. The "Total" row and column provide summaries for each category.



The competitive advantage

A distinct competitive advantage is critical for any startup to succeed. This section analyzes the core strengths that Lower Silesian startups believe set them apart, examining how these advantages shift with a company's maturity and target market.

The findings offer a snapshot of the strategic priorities within the regional ecosystem. Table 4.3.a. shows that startups in Lower Silesia primarily compete on the quality of their product, the strength of their team, and the uniqueness of their technology. In the early MVP development phase, "Proprietary technology / IP" is the most cited advantage, suggesting a focus on deep-tech foundations. However, as these companies mature and reach the Product-Market Fit stage, their focus shifts decisively to providing a "Superior product / User experience (UX)". This evolution highlights a key trend in the local ecosystem: transforming technological innovation into market-ready, user-centric solutions. The consistent high ranking of "Team expertise" across all stages underscores the value of the region's talent pool.

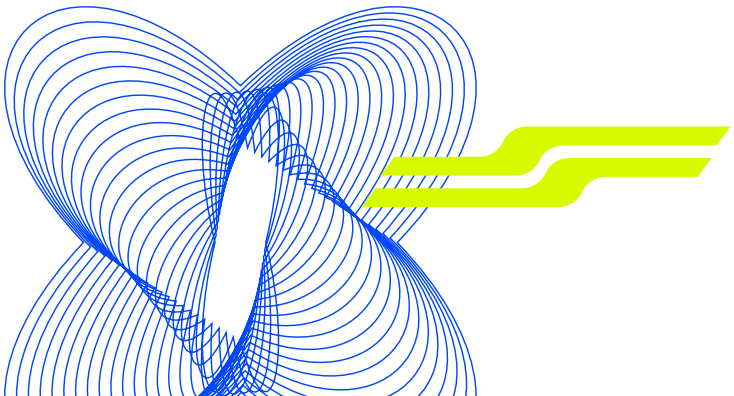
Table 4.3.a. Primary competitive advantage by startup development stage (N=63, survey data)

Startup's single most competitive advantage	Development stage of startup						
	Idea Stage	MVP Development	MVP Launched / Early Traction	Product - Market Fit	Growth Stage	Mature Stage	Total
Cost advantage: We have a fundamental structural advantage that allows us to operate or sell at a lower price point	1	0	2	0	2	0	5
Exclusive partnerships / Distribution channels: We have secured unique partnerships that give us access to customers that others cannot reach	1	0	1	1	0	1	4
First-mover advantage / Market leadership: We were the first to market and have established a strong lead	1	1	0	2	0	0	4
Network effects: The value of our product or service increases for users as more people join	0	1	1	2	1	0	5
Proprietary technology / IP: Our core technology is unique, patented, or very difficult to replicate	0	6	2	1	1	0	10
Strong brand / Community: We have built a trusted brand and a loyal community of users or fans	0	0	1	0	2	0	3
Superior product / User experience (UX): Our product is significantly easier, more effective, or more enjoyable to use than alternatives	0	2	2	4	3	3	14
Team expertise: Our founding team possesses a unique combination of skills or experience that is core to our success	1	2	4	2	3	0	12
We are still defining our primary competitive advantage	0	2	0	2	2	0	6
Total (N)	4	14	13	14	14	4	63

Table 4.3.b. cross-references the start-ups' competitive advantages with their primary target customers, from large enterprises to individual consumers. Segmenting by customer type shows the importance of a strong product and team, especially for startups targeting B2B (SMEs), the largest group surveyed. For these companies, a "Superior product / User experience (UX)" is the most critical differentiator. This suggests that local B2B startups are winning clients by offering practical, high-quality solutions rather than relying solely on cost or first-mover advantages. Other advantages are more niche; for instance, "Network effects" are more relevant for B2C startups, aligning with consumer-facing business models.

Table 4.3.b. Primary competitive advantage by target customer (N=59, survey data)

Startup's single most competitive advantage	Development stage of startup							
	B2B (Enterprise)	B2B (SMEs)	B2C	B2G	C2C	B2B and B2C	B2B and B2G	Total
Cost advantage: We have a fundamental structural advantage that allows us to operate or sell at a lower price point	1	3	0	0	0	0	1	5
Exclusive partnerships / Distribution channels: We have secured unique partnerships that give us access to customers that others cannot reach	1	3	0	0	0	0	0	4
First-mover advantage / Market leadership: We were the first to market and have established a strong lead	1	1	1	1	0	0	0	4
Network effects: The value of our product or service increases for users as more people join	0	2	3	0	0	0	0	5
Proprietary technology / IP: Our core technology is unique, patented, or very difficult to replicate	2	4	3	1	0	0	0	10
Strong brand / Community: We have built a trusted brand and a loyal community of users or fans	0	2	0	0	0	0	0	2
Superior product / User experience (UX): Our product is significantly easier, more effective, or more enjoyable to use than alternatives	3	6	1	0	1	1	0	12
Team expertise: Our founding team possesses a unique combination of skills or experience that is core to our success	1	5	4	1	0	1	0	11
We are still defining our primary competitive advantage	1	2	1	0	0	2	0	6
Total	10	28	12	3	1	4	1	59



Key startup achievements and milestones

The journey of a startup is marked by key milestones, but their importance varies. This section explores what achievements Lower Silesian startups prioritize based on their development stage and industry, revealing the different paths to success within the region.

Survey respondents were asked to allocate 100 points across their start-up's most significant achievements, where more points indicated the more significant the achievement. Table 4.3.c. illustrates the definition of a key milestone in Lower Silesia is heavily influenced by industry. The region's Medtech / Healthtech startups, for example, place an extremely high value on "Launched product(s)," reflecting long R&D cycles and the need for regulatory approval. In contrast, local Fintech / Insurtech startups are intensely focused on "Reached profitability/revenue milestone," pointing to a sector where early commercial viability is paramount. This sectoral diversity shows that there is no single blueprint for success in the ecosystem.

Table 4.3.c. Relative importance of achievements by top 15 sectors based on achievement score (N=60, survey data)

Sector	Secured major client(s)	Launched product(s) (e.g., MVP, full version)	Raised funding	Received prestigious award(s)	Achieved significant user growth/ traction	Reached profitability/ revenue milestone
Medtech / Healthtech	110	385	140	180	40	45
AI / Machine Learning	95	141	141	1	126	96
DeepTech	120	175	75	10	65	55
Fintech / Insurtech	0	70	100	0	95	235
FoodTech	45	125	45	0	40	45
IT / Hi-tech	99	118	8	29	28	18
PropTech	30	20	29	11	100	110
Saas	0	120	20	0	80	80
Cybersecurity	0	45	45	0	110	0
Entertainment / Media	10	90	40	10	30	20
HRTech	2	80	45	5	48	20
IoT, IIoT	40	100	5	10	35	10
Raw Material Industry	20	58	20	11	90	1
Software	65	50	0	0	25	60

Figure 4.3.a. illustrates the strategic priorities of Lower Silesian startups evolve logically with their growth. Early-stage companies are almost entirely focused on two foundational goals: "Launched product(s)" and "Raised funding". As they mature to the MVP Launched and Product-Market Fit stages, their attention broadens to include market validation metrics like "Achieved significant user growth/traction" and "Secured major client(s)". Finally, for growth-stage companies, the primary objective becomes "Reached profitability/revenue milestone," indicating a push toward building sustainable businesses.

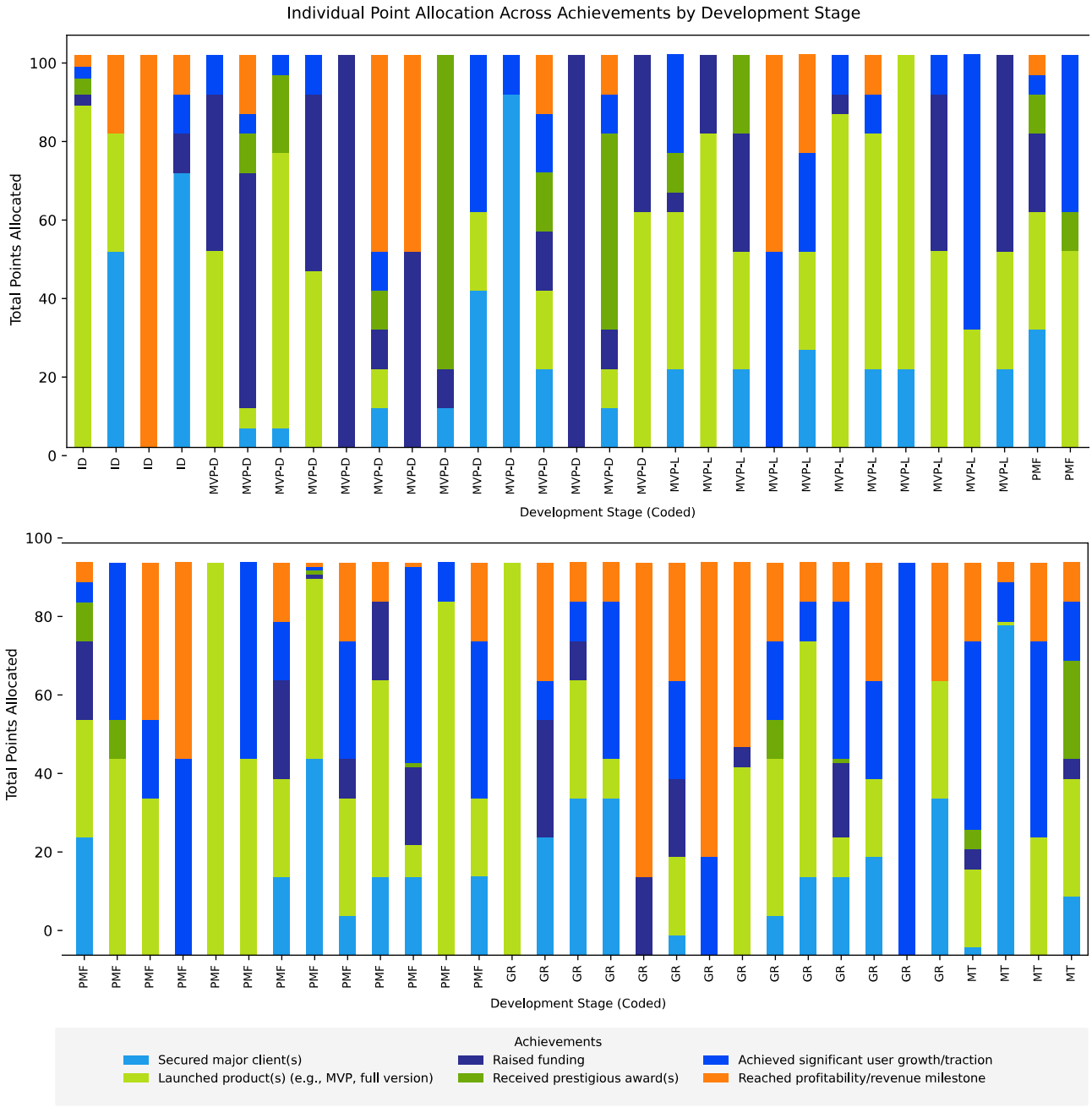


Figure 4.3.a. Distribution of achievement focus by startup startup development stage (N=60, survey data)

HOW TO UNDERSTAND THE FIGURE:

This chart visualizes the strategic priorities for 60 individual startups. Each vertical bar represents a single company, grouped by its development stage on the horizontal axis (e.g., MVP-D for MVP Development, PMF for Product-Market Fit). The colored segments show how each startup allocated 100 points across key achievements, the larger the segment, the greater the priority assigned to that milestone.

The funding landscape in Lower Silesia

Capital is essential for startup growth. The sources of this funding vary widely, from personal savings to venture capital, and the optimal funding strategy often changes as a startup matures.

This section examines the funding sources used by local startups, illustrating how financing strategies differ by company maturity and sector.

On an average, startups in the survey reported using 2.45 sources of funding (Standard deviation: 2.19). Figure 4.3.b. Shows that the funding journey for a Lower Silesian startup typically begins with "Bootstrap" (self-funding), which is the most common source across all stages. In the early phases, founders supplement this with capital from "Friends & Family" and "Government Grants/Public Funding". A significant shift occurs as startups gain traction, with "Angel Investors" and "Venture Capital Funds" becoming key sources of funding during the MVP Launched and Product-Market Fit stages. This pattern suggests a growing but still developing early-stage investment scene, where startups must first prove themselves before attracting professional capital.

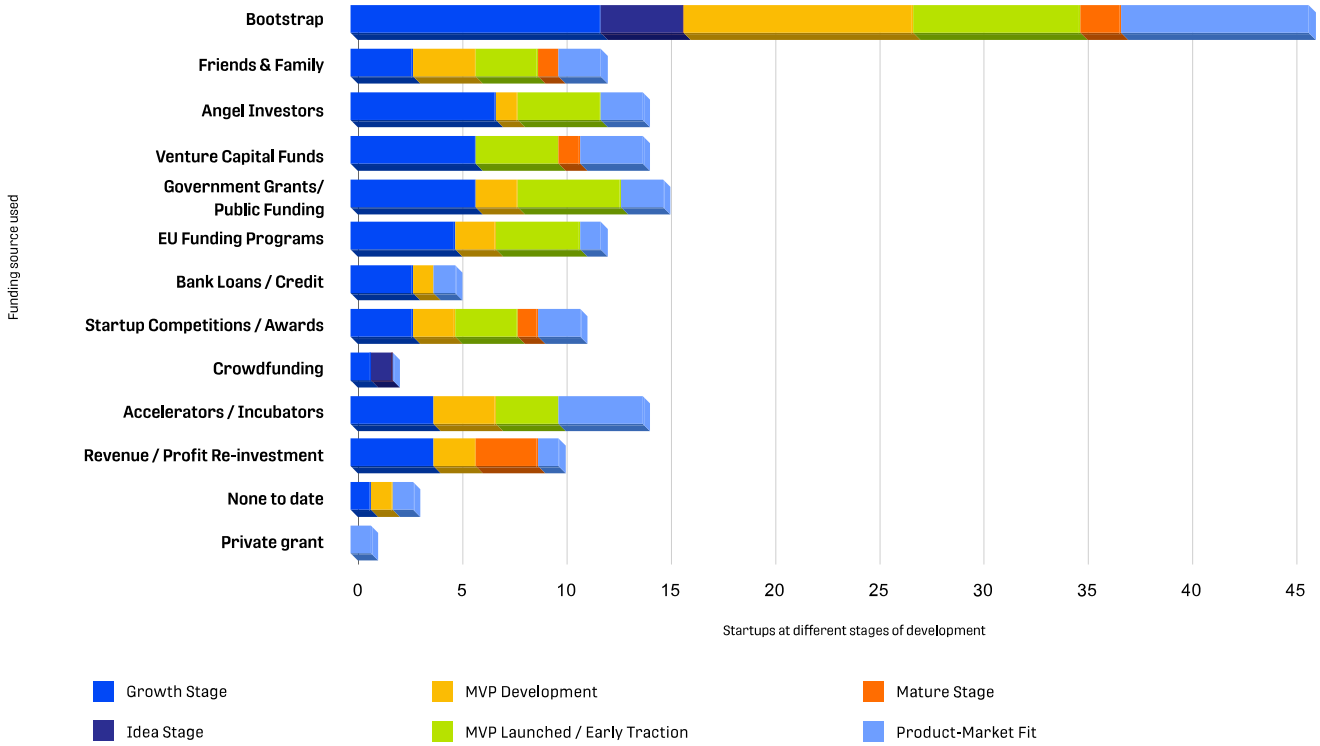
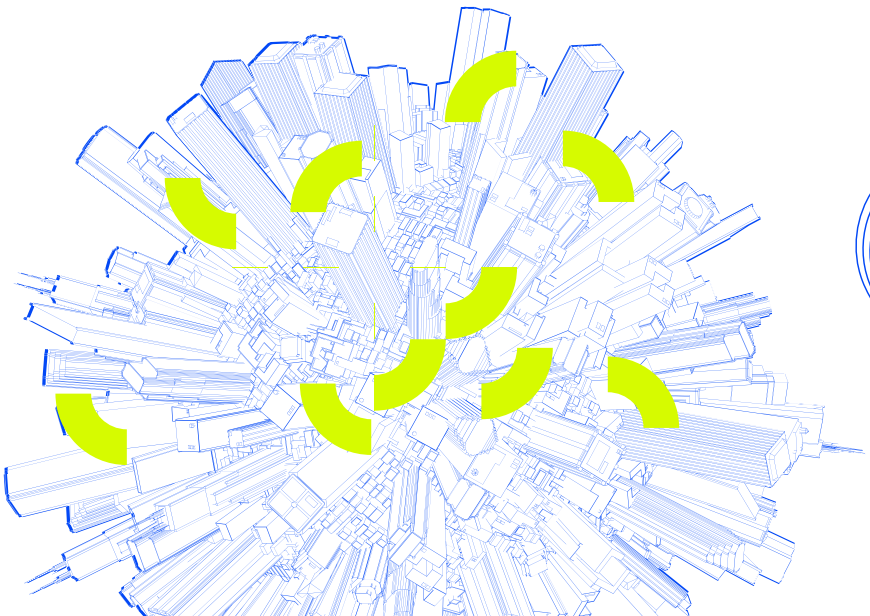


Figure 4.3.b. Funding source(s) utilized by startup development stage (N=65, survey day)



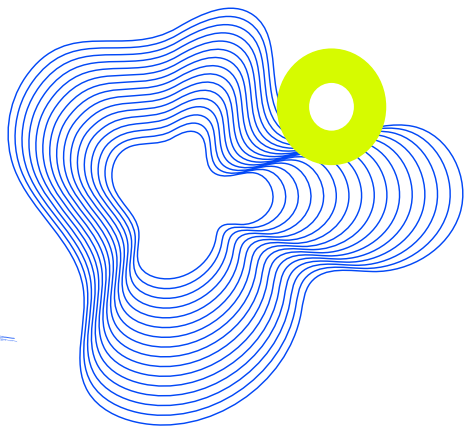


Figure 4.3.c. shows that in Lower Silesia a startup's industry dictates its funding needs. Capital-intensive sectors prominent in the region, like DeepTech and Medtech / Healthtech, leverage the widest variety of funding sources, from government grants to venture capital, to support their long development cycles. Other sectors, such as Fintech and SaaS, show a stronger reliance on "Venture Capital Funds," indicating their alignment with traditional venture-backed growth models. The analysis also shows that emerging technology sectors have more funding and options available.

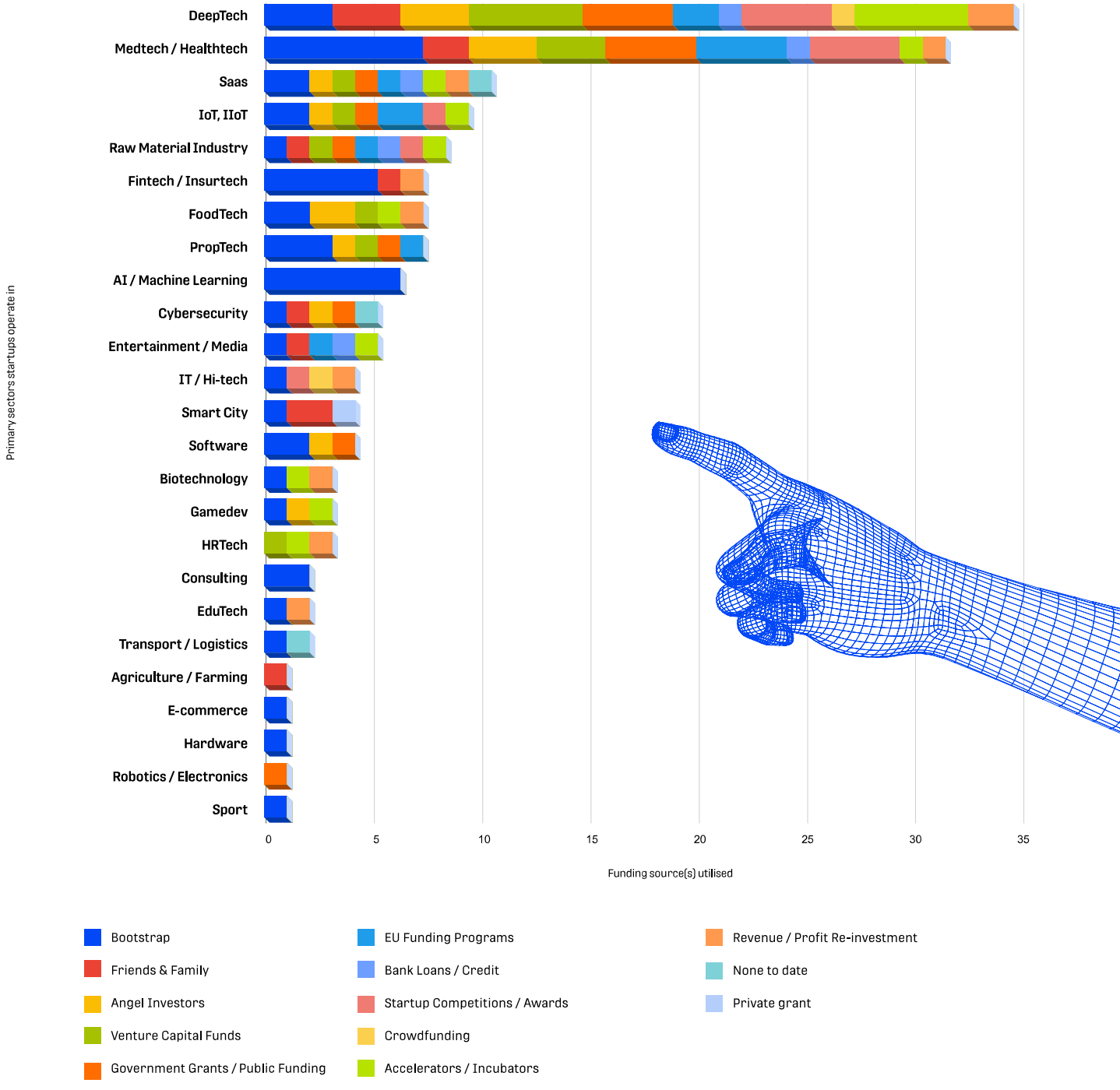


Figure 4.3.c. Funding sources utilized by primary sector (N=65, survey day)

The Revenue Reality

Ultimately, revenue validates a startup's business model. This section analyzes the Monthly Recurring Revenue (MRR) of surveyed startups to paint a realistic picture of the commercial maturity of the Lower Silesian ecosystem.

Figure 4.3.d. indicates that Lower Silesia's startup ecosystem is vibrant but young. A majority of companies are in the earliest stages of monetization, with 29.2% being pre-revenue and another 24.6% earning less than €5,000 per month. This means over half of the local ecosystem is still focused on finding a scalable revenue model. At the other end of the spectrum, a small but significant 7.7% have achieved an MRR of over €250,000, demonstrating that high-growth companies are emerging from the region.

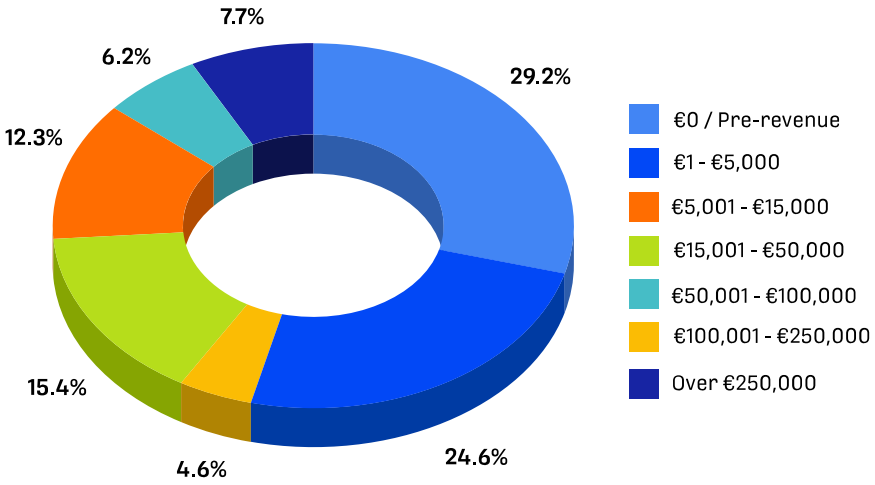


Figure 4.3.d.Distribution of monthly recurring revenue (MRR) across surveyed startups (N=65, survey day)

Table 4.3.d. Shows that there is a direct and clear correlation between a startup's development stage and its revenue. The pre-revenue and low-MRR categories are filled with companies in the MVP Development and MVP Launched stages. As local startups progress to Product-Market Fit and Growth stages, their revenues climb steadily, with Growth Stage companies appearing in the highest MRR brackets. This progression underscores the importance of maturing beyond the product to build a commercially successful enterprise.

Table 4.3.d. Monthly recurring revenue (MRR) by startup development stage (N=65, survey data)

	Monthly Recurring Revenue (MRR)							
	€0/ Pre-revenue	€1 to €5,000	€5,001 to €15,000	€15,001 to €50,000	€50,001 to €100,000	€100,001 to €250,000	Over €250,000	Total
Idea Stage	1	2	0	2	0	0	0	5
MVP Development	10	2	0	1	1	0	0	14
MVP Launched / Early Traction	6	6	1	1	0	0	0	14
Product-Market Fit	2	4	4	2	2	0	0	14
Growth Stage	0	2	3	4	1	3	1	14
Mature Stage	0	0	0	0	0	0	4	4
Total	19	16	8	10	4	3	5	59

Table 4.3.e. Monthly recurring revenue (MRR) by primary sector (N=65, survey data)

	Monthly Recurring Revenue (MRR)							
	€0/ Pre-revenue	€1 to €5,000	€5,001 to €15,000	€15,001 to €50,000	€50,001 to €100,000	€100,001 to €250,000	Over €250,000	Total
Agriculture / Farming	1	0	0	0	0	0	0	1
AI / Machine Learning	1	3	2	0	0	0	0	6
Biotechnology	0	1	0	0	0	0	0	1
Consulting	0	2	0	0	0	0	0	2
Cybersecurity	0	0	1	0	1	0	0	2
DeepTech	0	1	0	1	0	1	1	4
E-commerce	0	0	0	1	0	0	0	1
EduTech	0	1	0	0	0	0	0	1
Entertainment / Media	1	1	0	0	0	0	0	2
Fintech / Insurtech	2	0	1	1	0	0	1	5
FoodTech	1	1	0	1	0	0	0	3
Gamedev	0	0	0	1	0	0	0	1
Hardware	0	0	1	0	0	0	0	1
HRTech	1	0	0	0	0	0	1	2
IoT, IIoT	1	1	2	0	0	0	0	4
IT / Hi-tech	0	0	0	1	0	0	2	3
Medtech / Healthtech	4	3	0	1	1	0	0	9
PropTech	1	0	0	2	0	0	0	3
Raw Material Industry	0	0	1	0	1	0	0	2
Robotics / Electronics	0	1	0	0	0	0	0	1
Saas	2	0	0	1	0	0	0	3
Smart City	2	1	0	0	1	0	0	4
Software	0	0	0	0	0	2	0	2
Sport	1	0	0	0	0	0	0	1
Transport / Logistics	1	0	0	0	0	0	0	1
Total	19	16	8	10	4	3	5	65

Where do Startups' first investments go?

A startup's first expenditures offer a clear window into its strategic priorities and the nature of the ecosystem it inhabits.

In Lower Silesia, initial capital is directed towards "Product Development / R&D" and "Salaries" for founders and key employees. This spending pattern, however varies significantly by industry, as illustrated in Figure 4.4.a. Capital-intensive sectors such as Medtech/Healthtech and DeepTech predictably allocate the largest share of their funds to R&D, a reflection of their long and costly development cycles that often include essential steps like clinical trials. In contrast, sectors like Fintech/Insurtech balance heavy investment in product development with significant spending on sales and marketing, signaling an early drive for market penetration. Meanwhile, service-oriented sectors like Consulting prioritize spending on legal and administrative setup and office infrastructure, focusing on establishing a robust operational framework from day one. As shown in Figure 4.4.b, this focus evolves with maturity; while R&D spending is highest during all phases, salaries and sales become more prominent as companies scale and shift towards commercialization.

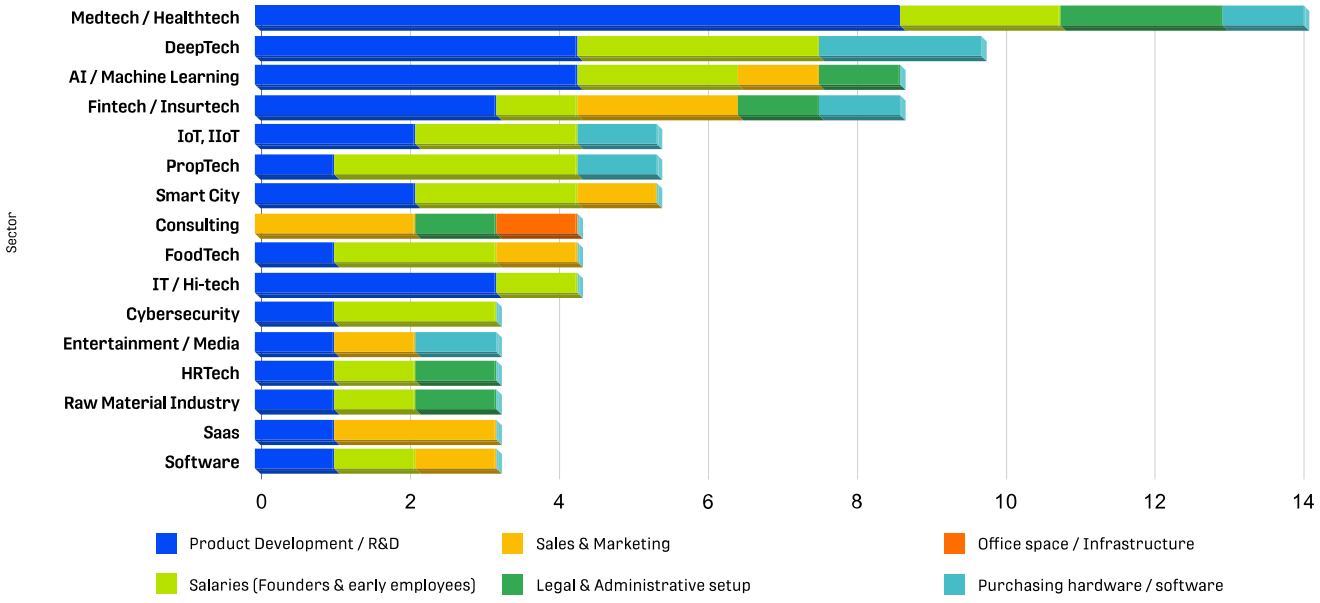


Figure 4.4.a. Top 16 sectors by initial capital allocation (N=65, survey data)

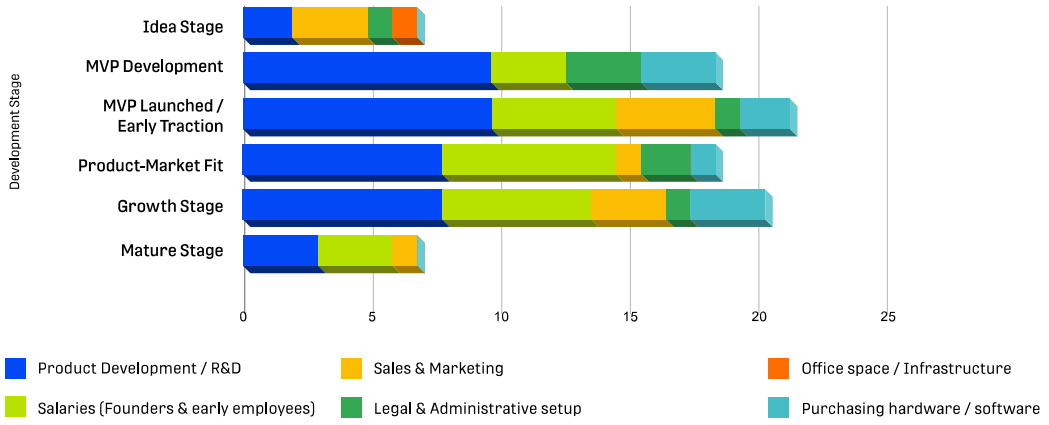


Figure 4.4.b. Initial capital allocation by startup development stage (N=65, survey data)

Biggest challenges startups are currently facing

Despite a strong focus on product development, the most persistent challenge for Lower Silesian startups is "Acquiring customers / Sales pipeline development".

This indicates that even with a technically sound product, the primary hurdle remains market entry and customer acquisition. This challenge transcends nearly all sectors and development stages, highlighting a gap between product creation and market adoption. Sector-specific challenges also paint a detailed picture of the ecosystem (Figure 4.4.c). For technologically advanced fields like AI/Machine Learning and DeepTech, key obstacles include scaling operations and expanding internationally. In more competitive markets like FoodTech, startups are more concerned with market saturation. The challenges also evolve with a company's lifecycle, as seen in Figure 4.4.d. Early-stage companies are occupied with refining their business model, but as they mature, their focus shifts towards scaling operations, managing growth, and ultimately, international expansion. Beyond capital, resource constraints like limited founder availability can also impact growth, as one SaaS founder noted, "Founders work part-time so the growth is slower than expected".

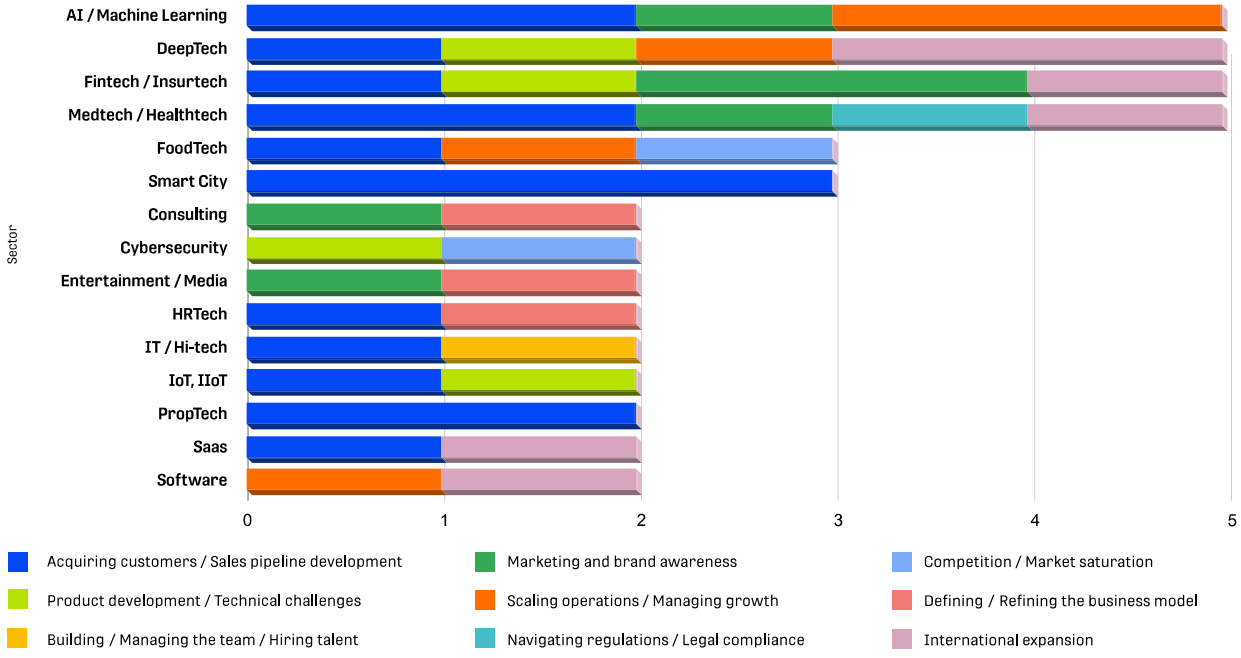


Figure 4.4.c. Biggest challenges faced by sector (N=53, survey data)

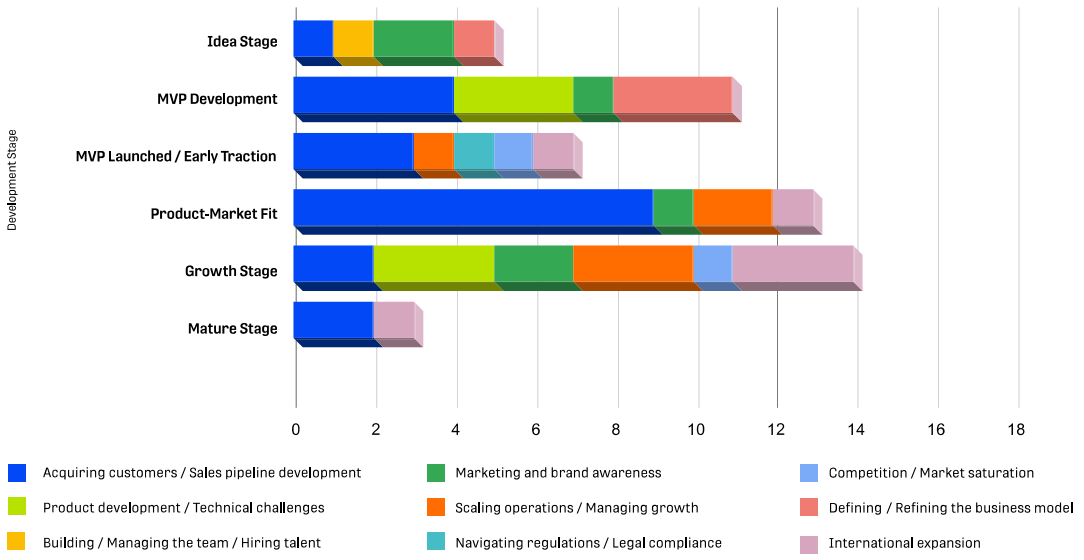


Figure 4.4.d. Biggest challenges faced by startup development stage (N=53, survey data)

Potential for Corporate Collaboration

Collaboration between startups and established corporations can be a powerful catalyst for growth, providing startups with market access, resources, and validation.

The survey reveals a strong and widespread appetite for such partnerships within the Lower Silesian ecosystem, as shown across various sectors in Figure 4.4.e. This interest in collaboration intensifies as startups mature. According to Figure 4.4.f, the vast majority of startups are either "Yes, actively seeking collaborations" or "Yes, open to opportunities," with the desire peaking during the Product-Market Fit and Growth stages, when they are best positioned to engage with larger partners.

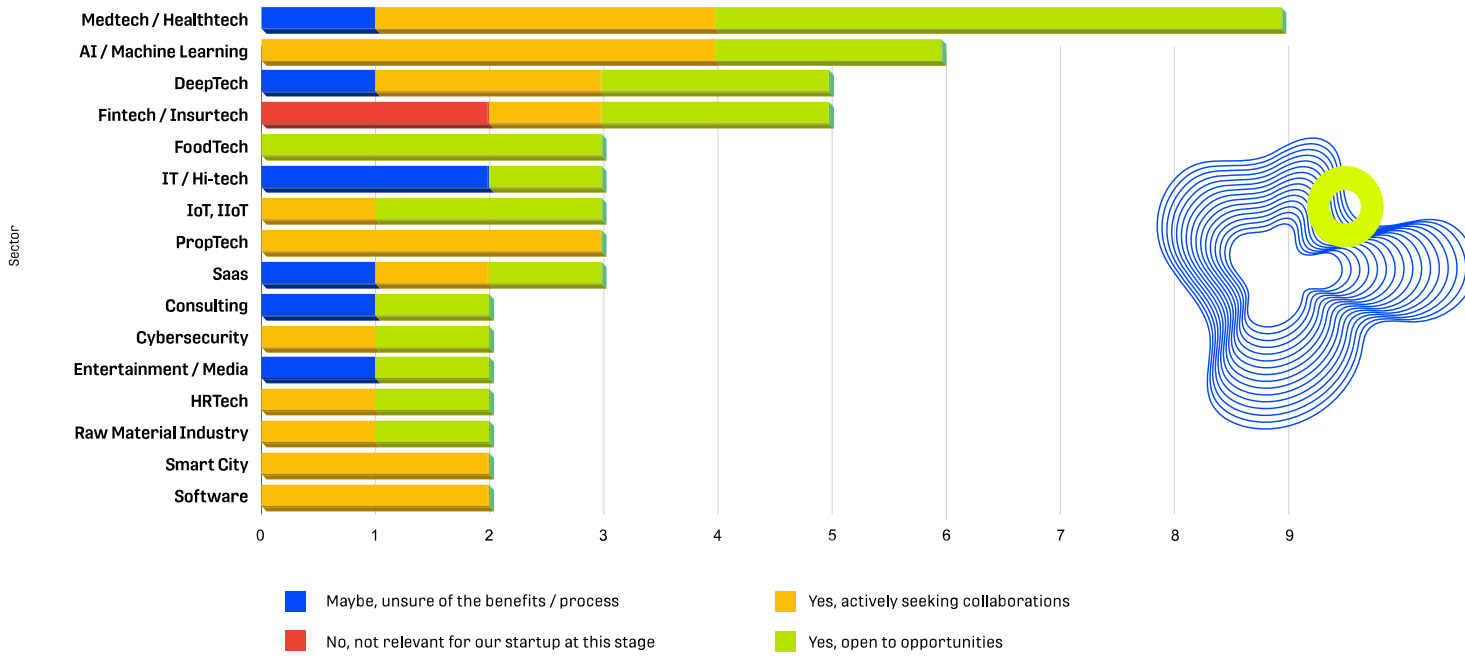


Figure 4.4.e. Openness to corporate collaboration by sector (N=63, survey data)

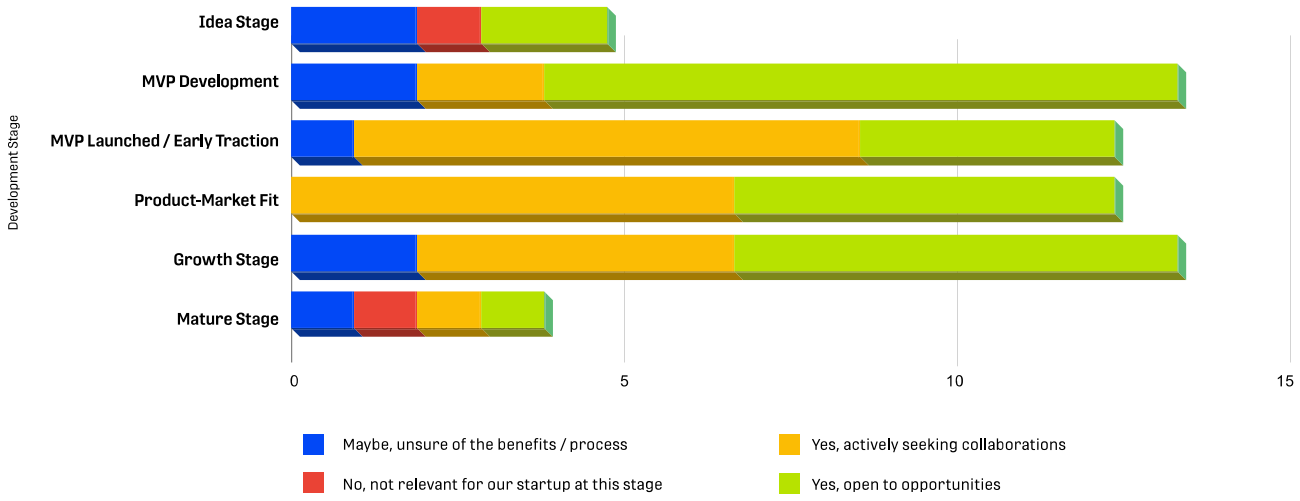


Figure 4.4.f. Openness to corporate collaboration by startup development stage (N=63, survey data)

For startups open to collaboration, the preferred models are practical and growth-oriented. Figure 4.4.g shows that preferences are consistent across most sectors, with a focus on tangible, market-driven partnerships. Medtech startups, for example, show a strong interest in becoming a supplier or collaborate for market access. In general, strategic partnerships, joint ventures and corporate investments (CVCs) were common in various sectors. One founder also expressed a need for E-commerce market experts in building development, marketing and sales strategies, indicating a demand for expert mentorship as a form of collaboration. Pilot projects / Proof-of-concept is the most sought-after form of collaboration across development stages, allowing startups to validate their technology in a real-world corporate environment (see Figure 4.4.h.). This is closely followed by establishing a "Supplier / Client relationship" and forming "Strategic partnerships / Joint ventures," underscoring a clear focus on generating revenue and market access through these relationships.

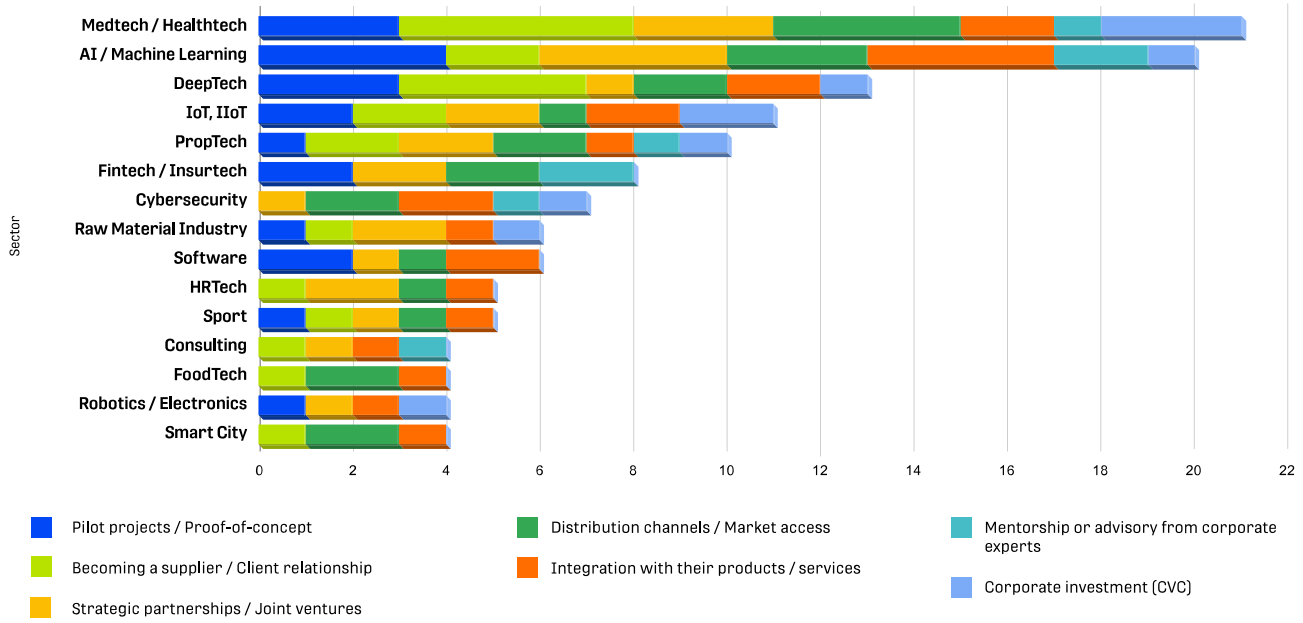


Figure 4.4.g. Preferred collaboration models by sector (N=53, survey data)

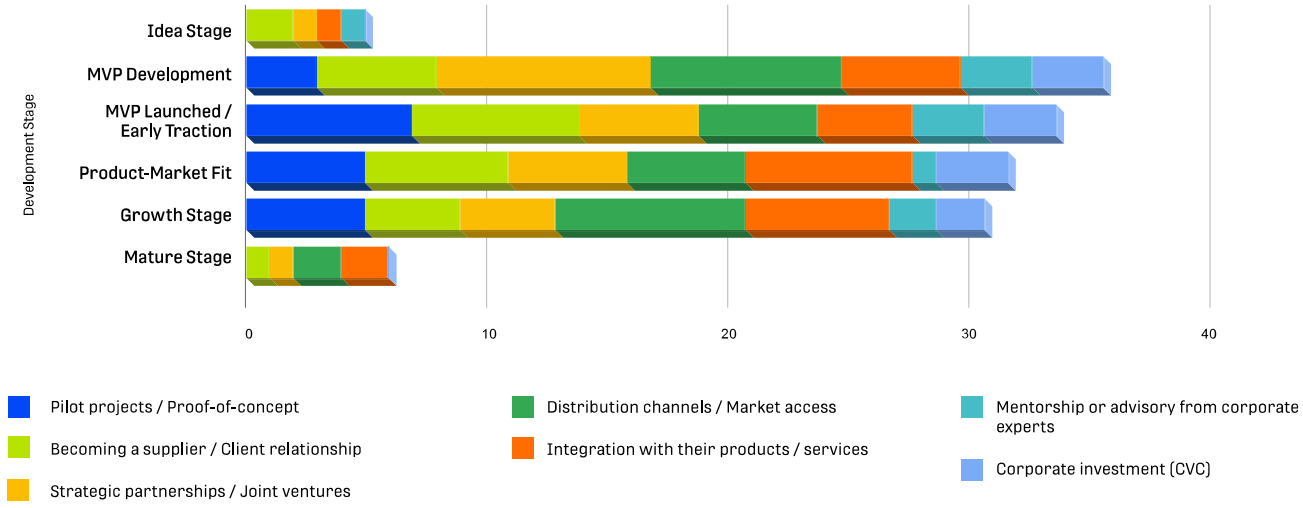


Figure 4.4.h. Preferred collaboration models by startup development stage (N=53, survey data)

Strategic Goals for the Next 12 Months

A startup's 12-month goals provide a clear roadmap of its immediate priorities. These objectives are heavily influenced by both industry and development stage.

As seen in Figure 4.4.i, Medtech/Healthtech startups prioritize "Secure next round of funding" to support lengthy R&D and regulatory processes. In contrast, data-driven sectors like AI/Machine Learning are more focused on "Achieve specific revenue/user growth targets" to validate their models and demonstrate market traction. Sectors reliant on ecosystem integration, such as PropTech and Fintech, place a greater emphasis on reaching profitability or improving product performance and building key strategic partnerships, respectively. These goals follow a logical progression through the startup lifecycle (see Figure 4.4.j.). Early-stage companies concentrate on foundational milestones like securing funding and launching a product or feature. Once product-market fit is achieved, priorities shift to scaling metrics, such as hitting revenue targets and expanding internationally. This evolution signals a healthy ecosystem where startups are successfully navigating from validation to growth. Other key goals cited include launching an MVP, resuming clinical trials, and securing patents.

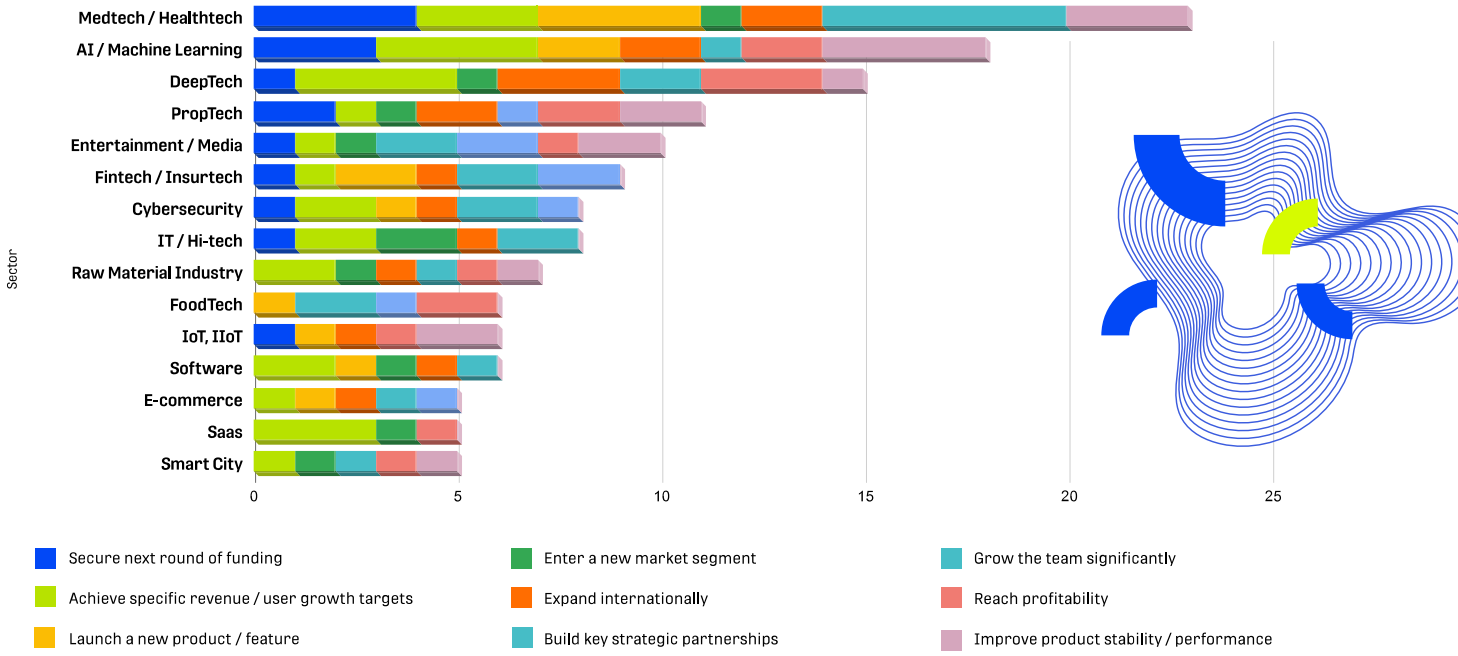


Figure 4.4.i. Primary strategic goals for the next 12 months by sector (N=60, survey data)

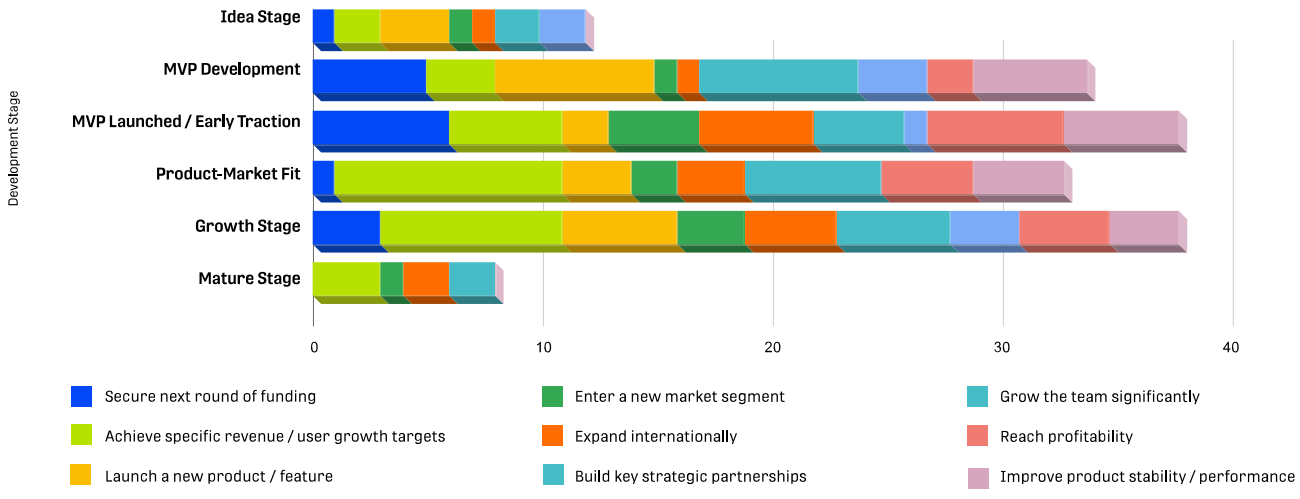


Figure 4.4.j. Primary strategic goals for the next 12 months by startup development stage (N=60, survey data)

Resources needed to accelerate growth

To achieve their ambitious goals, startups depend on a supportive ecosystem that provides critical resources.

Across all sectors and stages, two needs stand out: "Access to Seed/VC funding" and "Networking opportunities" with investors, clients, and partners (see Figures 4.4.k. and 4.4.l.). This underscores that growth in Lower Silesia is fueled by both capital and strategic connections. Capital-intensive industries like Medtech/Healthtech and DeepTech intuitively express the greatest need for funding. In contrast, human-capital-intensive sectors like consulting show a higher demand for mentorship. Needs also evolve with maturity. Early-stage startups have a stronger requirement for mentorship and sales/marketing support to navigate initial challenges. As companies grow, their focus shifts to needing "Support with international expansion" and talent acquisition. Beyond these areas, there is also a clear demand for practical operational guidance, with one founder highlighting a need for advisory on "Tax/process automation/legal/credit line," pointing to a gap in scalable business support.

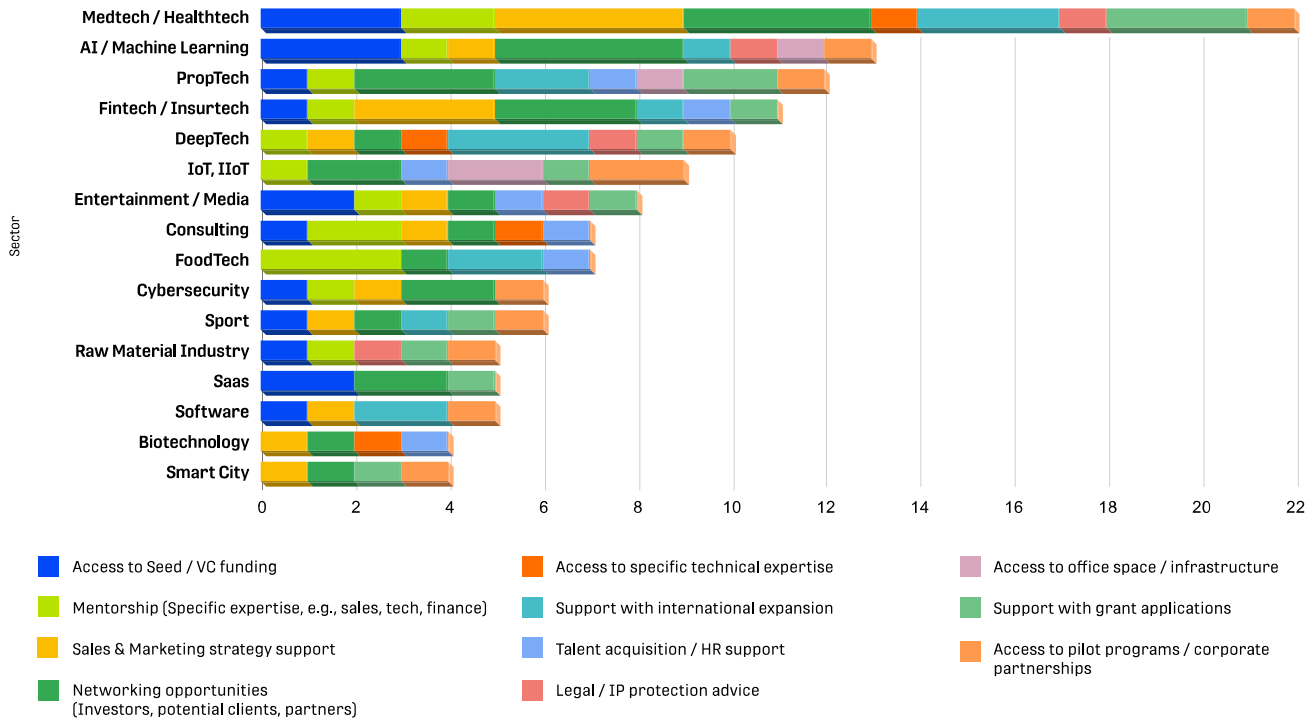


Figure 4.4.k. Most needed support and resources by sector (N=64, survey data)

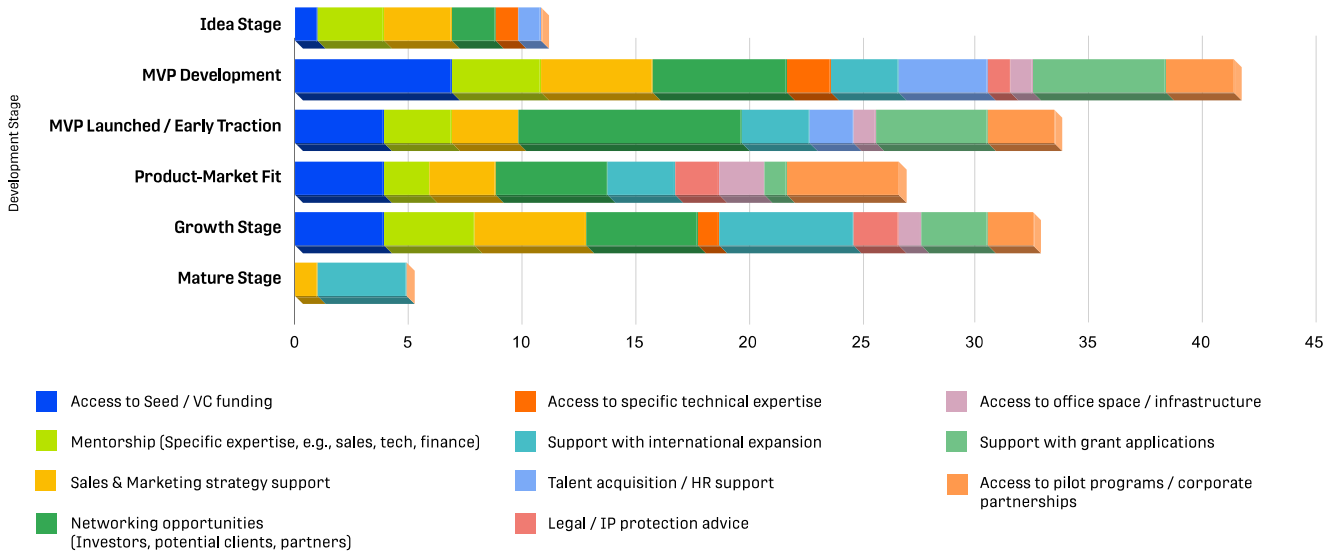


Figure 4.4.l. Most needed support and resources by startup development stage (N=64, survey data)

Lower Silesia Startup Showcase

4FUND.COM

4fund.com by Zrzutka.pl

Only EU-wide licensed crowd-funding platform — fast, secure, zero-fee fundraising for personal & community causes.

Read more:

ALOKAI

alokai

Frontend as a Service delivering custom, fast storefronts to boost conversion and revenue.

Read more:

BIOCAM

BIOCAM CAPSULE ENDOSCOPY

MedTech startup developing remote AI-powered capsule endoscopy to enhance care for humans and animals.

Read more:

BRAND24

BRAND24

Leading internet and social media monitoring tool in Poland, trusted by global brands.

Read more:

BZB UAS

BZB UAS

Designs, manufactures, and integrates unmanned aerial systems (UAS), specializing in VTOL drones for agriculture, forestry, and civil applications.

Read more:

CLONE

CLONE

Building the world's first biomimetic androids with human-level hands for real-life problem solving.

Read more:

CUX

CUX

CUX makes analytics approachable for every team. It's a cross-platform Digital Experience Analytics Platform, powered by Human Insight.

Read more:

DATAWALK

DataWalk

An enterprise Graph & AI platform that turns vast data sets into actionable intelligence & accelerates investigations.

Read more:

GEKKO PHOTONICS

gekko photonics

Industrial spectroscopy analyzers delivering accurate chemical monitoring with easy-to-interpret results.

Read more:

GOMEETIFY

goMeetiFy spotkaj, twórz, przeżywaj!

GoMeetify bridges digital and real—a social game where education and activation lead the way.

Read more:

GREEN SEQUEST

GREEN SEQUEST

Climate-tech startup creating innovative solutions for carbon removal in agriculture and construction sectors.

Read more:

HUSTRO

Hustro

AI-driven construction management software focused on simplicity and speed, aiming to reduce admin work on projects by 80%.

Read more:

INFERMEDICA

Infermedica

AI-powered platform helping people make better health decisions and improving access to affordable healthcare.

Read more:

INKSEARCH

INK SEARCH

INKsearch.co - #1 software for tattoo studios. We speed up connection between the best artists and clients

Read more:

LABPLUS

labplus

Transforming raw laboratory results into personalized health insights & next-step recommendations for patients.

Read more:

PAYEYE

payeye

Global fintech building the future with iris+face biometrics for secure identity and device-free payments.

Read more:

SATREV

SATREV

Earth-observation satellites and data for understanding and monitoring the changing world.

Read more:

SAULE TECHNOLOGIES

SAULE TECHNOLOGIES

Pioneer in perovskite solar cells, developing lightweight, flexible photovoltaics for diverse applications.

Read more:

SCANWAY

SCANWAY.

Designs high-res telescopes and multispectral cameras for microsatellites, supporting Earth Observation missions.

Read more:

SMARTLUNCH

SMARTLUNCH

A corporate benefits platform enabling employees to order workplace meals, co-financed by their employer.

Read more:

REHAPP

REHApp powered by SPINETIME

Clinically proven, AI-powered DTx for remote diagnosis & personalized therapy of musculoskeletal dysfunctions.

Read more:

SURFER

SURFER

Clinically proven, AI-powered DTx for remote diagnosis & personalized therapy of musculoskeletal dysfunctions.

Read more:

TECHLAND

TECHLAND

One of Poland's largest video game developers, creating blockbuster AAA titles enjoyed by players worldwide.

Read more:

TEN SQUARE GAMES

ten square games

Poland's top mobile free-to-play developers, creating engaging games inspired by outdoor hobbies worldwide.

Read more:

TERRAEYE

TERRA·EYE

TerraEye accelerates mineral exploration with AI and satellite data, delivering insights, reduced costs, better targets.

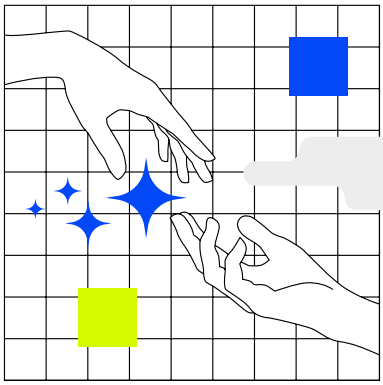
Read more:

USEME

useme

Platform enabling secure, paperless collaboration and invoicing between companies and freelancers worldwide.

Read more:



Startups Commentary

Przemek Głośny

CEO
Useme

BIO

Founder and CEO of Useme, a rapidly growing FinTech/HRTech startup. He has scaled the company from scratch to $60M in revenue, while retaining control as the major shareholder.

What is the Lower Silesian ecosystem doing well... but what, paradoxically, might slow it down in the longer run?

What is good about the Wrocław ecosystem is how we build networking and organize meetings where companies can get to know each other and share experiences. However, this creates false hopes that it is cool to build startups, while the simultaneous lack of financing instruments for such companies in the early stages of development can slow down their growth.

Are we truly a supportive community — or do we just like to say that we are? And if we really are, how exactly do we support each other?

No, we know each other and sometimes help each other. Supportive communities provide help at every step, and such an atmosphere exists, for example, in Tel Aviv or Silicon Valley, where companies exchange experiences and respond to every request for help or advice. Also, one success drives people to build new, great companies, while we are at the stage of building our first successes. We are also blocked by typical Polish distrust and primarily look after our interests. This is changing, and I know more and more people who help completely selflessly (a great example - the Karwatka brothers). Unfortunately, most people do it only when they can get something in return.

If you were to identify the missing activities and institutions of the startup ecosystem that would operate locally (in the city, agglomeration and voivodeship), what would they be?

If, with government support, local companies, or EU funds, Wrocław built its financing system for companies in early stages of development, plus add additional support in the form of free coworking spaces or access to expert knowledge, we could become the true capital of Polish startups, maybe even a leading center in Central Europe. As it is for now, we are growing mainly thanks to individual entrepreneurship and attracting people from other, smaller cities. These activities and support centers could build a true ecosystem, because we have only managed to create only a good network so far.

Radosław Paklikowski

CEO
4programmers

BIO

Debut on the stock exchange at the age of 25. Business Angel. Built a 150-person MasterBorn team, operates globally. Expert in business strategy and investments.

What is the one question every startup should ask itself before going after funding — but almost never does?

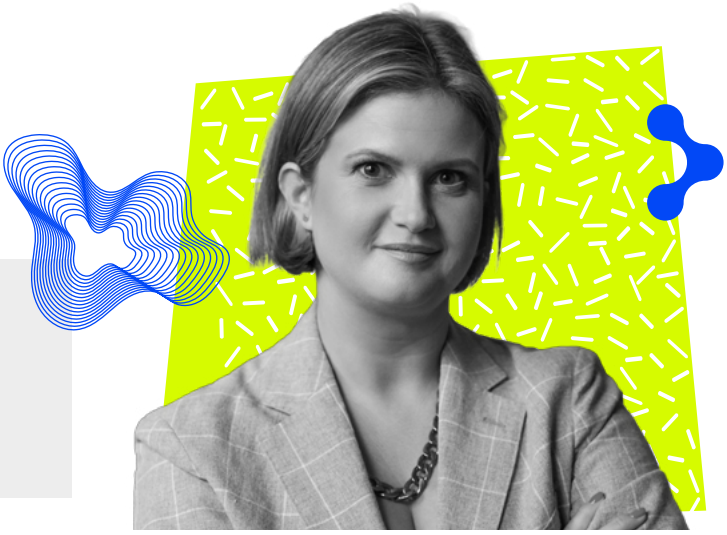
In the startup ecosystem, fundraising is often seen as the ultimate proof of validation — the holy grail confirming the value of a venture. Founders, fueled by stories of multi-million funding rounds, frequently treat raising capital not as a means to an end, but as an end in itself.

This is a fundamental mistake that diverts attention from what truly matters. The fundraising process, instead of being a catalyst for growth, becomes a massive distraction that consumes time and energy.

The one critical, yet almost always ignored, question is: "Are we Default Alive or Default Dead?" The answer is not just a financial metric; it is a strategic compass that determines whether fundraising will be an act of strength or a fight for survival. If you can reach profitability before your cash runs out, wait — and enter investor conversations from an entirely different negotiating position.

Paulina Walkowiak

CEO/co-founder
CUX



BIO

CEO and co-founder of CUX, bridges the gap between technology and human insight. She builds tools that empower companies to truly understand their customers, setting a new standard for business growth.

Are we truly a supportive community — or do we just like to say that we are? And if we really are, how exactly do we support each other?

I have found the support within this community to be genuinely exceptional. I am proud that our company is officially registered in Wrocław, because the people who make up this ecosystem are like a group of "groupies" I can always count on first.

The energy in Wrocław is fantastic. I have frequently formed new business relationships just from hearing that someone wanted to get to know me or us because we are from Wrocław. This is more than just talking; it is tangible support based on shared identity and trust. We act as a first line of support for one another, creating an environment where a shared city is a solid foundation for business connections. It is a testament to the genuine, proactive support we offer one another.

What will we do if we do not get the money?

And this is not about being pessimistic; it is about being pragmatic. Startups often focus solely on the funding path, creating a single, high-risk strategy that assumes success. This question forces them to think about resilience and self-reliance. It pushes founders to develop a "Plan B" that focuses on organic growth, finding a unique way to generate revenue, or even scaling down.

A startup that can answer this question with a clear, alternative strategy demonstrates true strength. It shows they understand their business beyond just a funding opportunity and that their vision is not dependent on external validation. It is a sign of a truly resilient business model and a team that is prepared for any scenario. This shift in mindset from "how do we get money" to "how do we succeed regardless" is crucial for long-term survival.

The Lower Silesian Investor Profile

The Lower Silesian investment landscape is defined by a strong local, early-stage focus, increasingly validated and funded by capital from Warsaw. The typical investor is a hands-on partner, providing strategic value far beyond capital. For this section of the report, data from Investors' survey responses and Lower Silesian data from the "Map of the Polish ecosystem" created by Dealroom and PFR, were used.

70+

Distinct investing entities with a declared interest or presence in the region.

19

Investors who provided detailed responses in our targeted survey, forming the core of this report's analysis.

Capital Origins: A "Local-First" Loop

The data reveals a strong reliance on domestic capital, which shapes the trajectory of local startups.

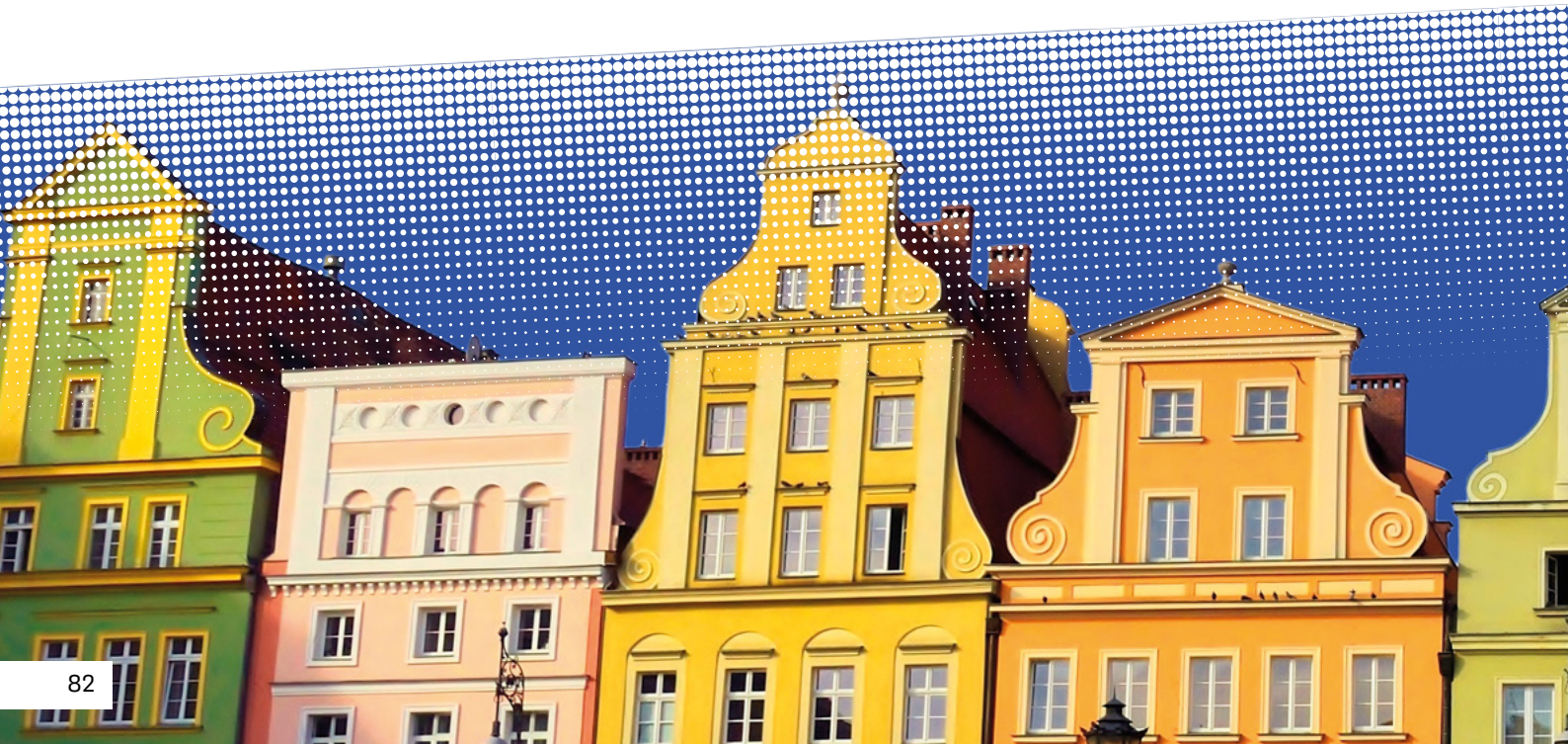
GEOGRAPHIC SOURCE OF FUNDS: PRIMARILY FROM POLAND

The vast majority of capital invested in the region is domestic. A significant number of active investors (>53%) are based in Warsaw, demonstrating the region's ability to attract capital from Poland's financial center.

SOURCE OF LP CAPITAL (WHO FUNDS THE FUNDS?)

1. High-Net-Worth Individuals (HNWIs) and Angel Investors
2. Government or Public Agencies (e.g., PFR, EIF)

This reliance on domestic capital may temper the global ambitions of local startups, a perceived weakness noted by investors themselves.



Who Invests in Lower Silesia?

A maturing ecosystem characterized by a healthy mix of institutional and private capital. Following are the primary investor archetypes (non-public):

THE LOCAL SEED VC

Professional funds, typically Wrocław-based, writing the first institutional checks ranging from €50,000 to €500,000. They are highly active in the ecosystem, providing hands-on support, strategic guidance, and deep access to local and national networks.

Representative Entities: Czysta3.VC, WP2 Investments, Brave Venture Capital, Unvold.VC (previously Venture Inc.).

THE ACTIVE BUSINESS ANGEL

High-net-worth individuals, often successful former founders or senior corporate executives, providing crucial pre-seed capital and industry-specific mentorship. Investments are typically relationship-driven and often fall below the €50,000 threshold, serving as the earliest form of external validation for new ventures.

Representative Individuals: Mirosław Lubarski, Bartosz Majewski, Piotr Czajkowski.

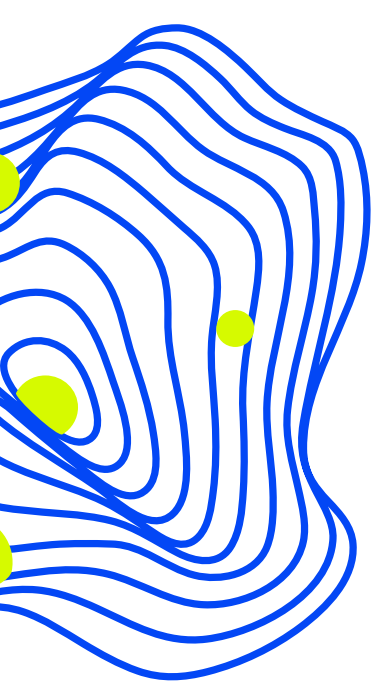
THE STRATEGIC CORPORATE & ACQUIRER

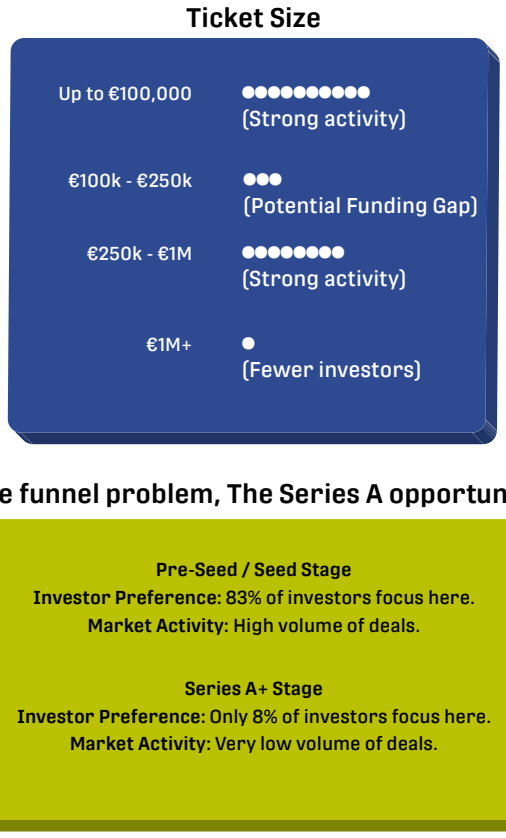
Large regional and national corporations that engage with the startup ecosystem through direct investment, strategic partnerships, or acquisitions. These entities provide a vital path to exit for founders and their early investors, validating the ecosystem's commercial output.

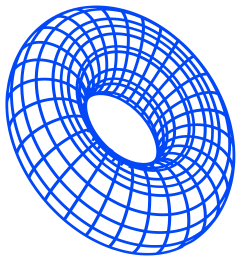
Representative Entities: CCC, Selena, Develia, Sygnity, Piwik PRO.

Typical first-investment ticket size

The survey data and secondary data from Dealroom and PFR shows the following clusters of activity, highlighting a potential funding gap. See Figure 5.1.a. below.





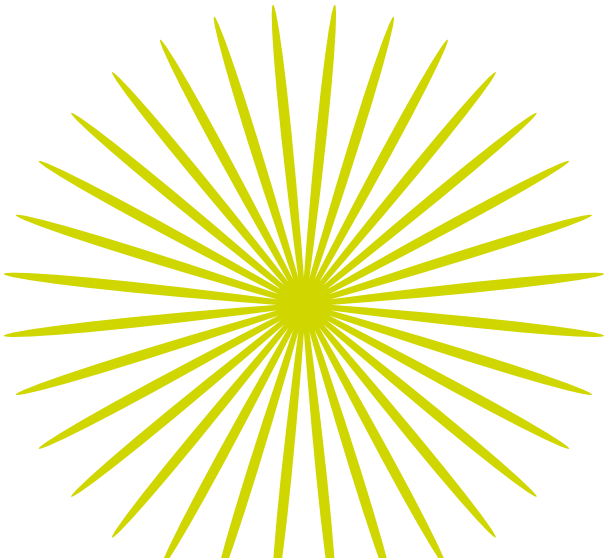


Note: Above Data represents the relative concentration of investors in each size, based on the direct survey data provided, dealroom data, and the enquiry of the missing values directly from the Investor/Fund.

Figure 5.1.a. Relative concentration of investor activity by first-check ticket size.

This heavy concentration of capital and attention at the earliest stages creates a "capital crowd." For founders, this is a double-edged sword. On one hand, capital is demonstrably available for new and innovative ideas. On the other, it creates intense competition for the attention and capital of the most reputable and value-adding investors. To stand out, founding teams must be exceptionally well-prepared, with a clear vision, defensible technology, and a deep understanding of their market. For investors, this dynamic means that while deal flow is abundant, the primary challenge lies in sourcing and identifying the truly elite opportunities amidst the noise.

The direct consequence of this early-stage crowding represents the ecosystem's most significant structural bottleneck. The region is successfully nurturing a large cohort of seed-funded companies, but as these companies mature and require larger rounds of capital to scale, they will find a stark lack of local investors capable of leading a Series A round. This forces the most promising scale-ups to look to Warsaw, Berlin, London, or the US for their next phase of growth. This dynamic poses a critical strategic risk, as the ecosystem may end up "exporting" its successes, losing out on the high-value jobs, wealth creation, and experienced talent that would otherwise anchor the local community. Addressing this growth-stage funding gap by attracting or cultivating dedicated Series A investors should be the highest priority for regional stakeholders.



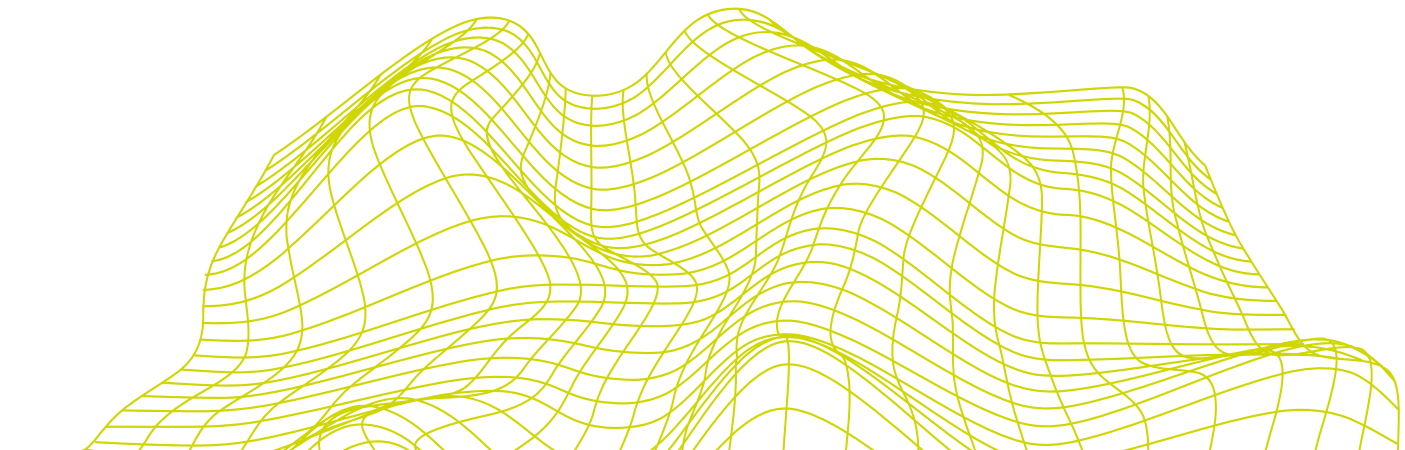
Key investor profiles

The Table 5.1.a. provides a more granular look at some of the key players shaping the region's investment landscape. It details the profiles of representative venture capital funds, angel networks, and other entities that are actively deploying capital in Lower Silesia.

Table 5.1.a. Profiles of Selected Investors Active in the Lower Silesian Ecosystem.

Investor/ Fund Name	Investor Type	HQ Location	Deal Count (All Time)	Preferred Stage	Typical First Ticket
24Ventures	Venture Capital	Wrocław	1	Seed	€250,001 - €1,000,000
Brave Venture Capital	Venture Capital	Wrocław	7	Pre-seed / Seed	€50,000 - €500,00
Cobin Angels	Business Angel Network	Warsaw	-	Seed	€25,001 - €100,000
Czysta3.VC	Venture Capital	Wrocław	27	Seed	€100,001 - €250,000
ERC (PGE Ventures)	Venture Capital	Wrocław	33	Pre-seed / Seed	€200,000 - €300,000
GT Technologies	Venture Capital	Bielany Wrocław-skie	9	-	-
Hard2beat	Venture Capital	Wrocław	3	Pre-seed / Seed	€250,001 - €2,000,000
Individual Angels	Business Angel	Wrocław	-	Pre-seed / Idea Stage	Up to €25,000
PORT Polish Center	Public/ Ecosystem	Wrocław	8	-	-
Prometeia Innovation Fund	Venture Capital	Wrocław	8	-	-
Radix Ventures	Venture Capital	Wrocław	-	Seed	€1,000,001+
RST Ventures For Earth	Venture Capital	Wrocław	13	Pre-speed, Seed	€250,001 - €1,000,000
Shape.VC	Venture Capital	Wrocław	36	Series A*	€100,001 - €250,000
Unfold.VC (previously Venture Inc.)	Venture Capital	Wrocław	26 + 12	Seed	-
WP2 Investments	Family Office / VC	Bielany Wrocławskie	22	Pre-seed / Seed	€250,001 - €1,000,000

Note: Data compiled and synthesized from survey responses and Dealroom profiles. "Investor Type," "Focus," "Stage," and "Ticket Size" are based on self-reported survey data where available. "-" indicates unavailable data.
*Self-reported data: The preferred stage of Series A does not exactly match with typical first-ticket.



Investors' top sectors of focus

The investment priorities in Lower Silesia reveal a strategy that aligns the region's unique industrial and academic strengths with the most critical objectives of Poland and the European Union. The strong focus on Industry 4.0, IoT, and Robotics is a direct investment in the future of Lower Silesia's identity as a core manufacturing and logistics hub for Europe. See Figure 5.1.b.

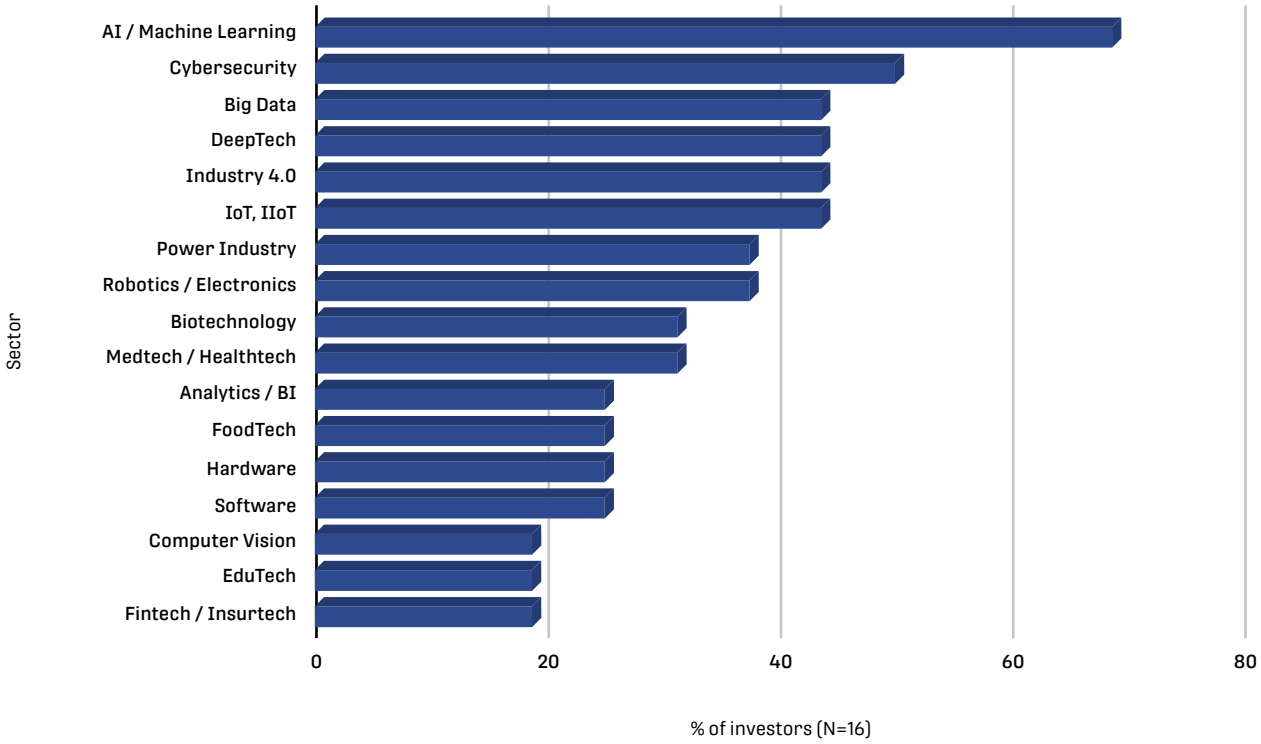


Figure 5.1.b. Top sectors of interest for investors in Lower Silesia

Investors are backing startups that can digitize and automate the region's powerful industrial base, future-proofing its primary economic engine. In parallel, the high interest in the Power Industry and Cybersecurity clearly targets pressing national and continental challenges. This reflects the immense market created by Poland's energy transition under the EU Green Deal and the critical need for digital defense given its strategic geopolitical position.

Ultimately, the dominant interest in AI/Machine Learning and DeepTech signals a focus on Europe's long-term competitiveness. This aligns perfectly with the EU's push for "strategic autonomy", the goal of developing sovereign capabilities in foundational technologies. Investors seem to be betting that Wrocław's deep pool of engineering talent can establish it as a key hub for building the core technologies that will secure Europe's future, making this a calculated play on both regional talent and continental ambition.

This concentration of interest in high-value, knowledge-based industries suggests that investors view Lower Silesia as a hub for specialized technological innovation. This aligns with national reports highlighting AI and IoT as key strengths of the broader Polish tech ecosystem.

Notable investments and success stories

The Lower Silesian investment landscape has produced a remarkable portfolio of companies that have achieved global recognition, significant market valuations, and high-value exits. The success of these ventures underscores the region's strength in fostering innovation across diverse, high-growth sectors, from deep tech and AI to e-commerce and gaming. Table 5.1.b. Shows the summary of the most significant investments and success stories backed by investors from the region.

Table 5.1.b. Notable success stories and investments backed by Lower Silesian investors.

Notable Company	Sector	Key Investor(s)
Infermedica (HQ: Wrocław, Poland)	Healthtech	Unfold.VC (previously Venture Inc.) PORT Polish Center for Technology
Brand24 (HQ: Wrocław, Poland)	SaaS	Unfold.VC (previously Venture Inc.)
SatRev (HQ: Wrocław, Poland)	Space Technology	Millennials Venture Capital Tech Invest Group
MODIVO (HQ: Zielona Góra, Poland)	E-commerce	CCC
ElevenLabs (HQ: New York, USA)	Artificial Intelligence	Bartosz Majewski
Exscientia (HQ: Oxford, UK)	AI / Pharmaceuticals	GT Technologies
Glovo (HQ: Barcelona, Spain)	Food Delivery	AmRest
Pizzaportal.pl (HQ: Łódź, Poland)	Food Delivery	AmRest
InPost (HQ: Kraków, Poland)	Logistics & E-commerce	Credit Agricole Bank Polska
Gamesture (HQ: Kraków, Poland)	Gaming	Ten Square Games
Digital First AI (HQ: Rzeszów, Poland)	Artificial Intelligence	Mirosław Lubarski Maciej Zawadziński

Investment pace: Caution vs. Optimism

This section shows the investment activity in Lower Silesia, across the recent past, the present and its likely trajectory in the near future. By examining long-term trends alongside current investor sentiment, we see a picture of an eco-system marked by a recent, cautious recalibration but poised for optimistic gro-wth.

THE LAST 15 YEARS...

The last decade and a half have seen the Lower Silesian ecosystem evolve from its nascent stages into a more dynamic landscape. Figures 5.2.a and 5.2.b. illustrate the volume and value of investment rounds, revealing key growth periods and recent shifts in activity.

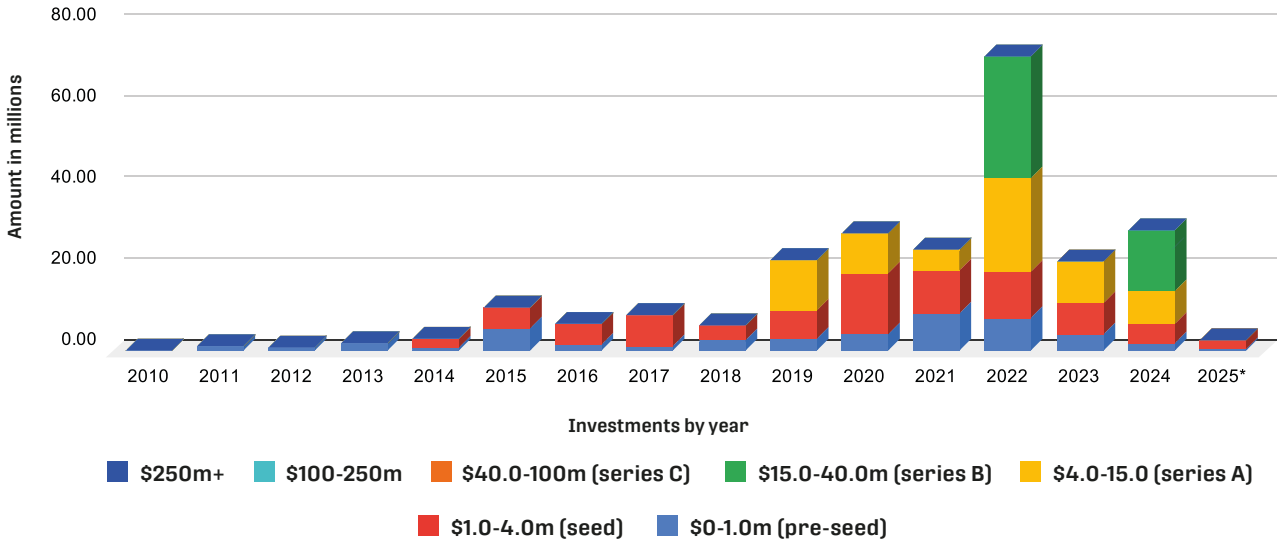


Figure 5.2.a. Total Investment Amount by Year ($ millions)

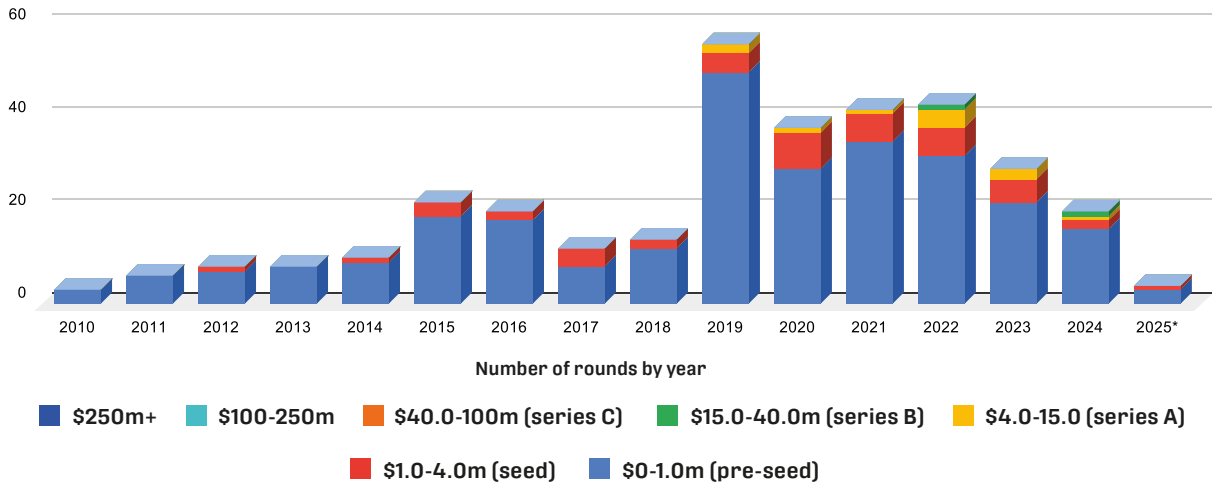


Figure 5.2.b. Total Number of Investment Rounds by Year

The last 2 years (2023–2024), compared to 2021–2022

The most recent two-year period has been one of recalibration, with a fragmented market response to broader economic conditions. While deal volume has decreased from the 2022 peak, a core group of investors has remained active, signaling continued confidence in the market's fundamentals.

INVESTMENT PACE COMPARED TO 2021–2022

A portion of investors continued to deploy capital, where a substantial number maintained their previous pace, whereas a small number reduced investments, see Figure 5.2.c. It was notable that a little less than 50% of the investors reported not investing in the past two years, showing the "wait-and-see" approach.

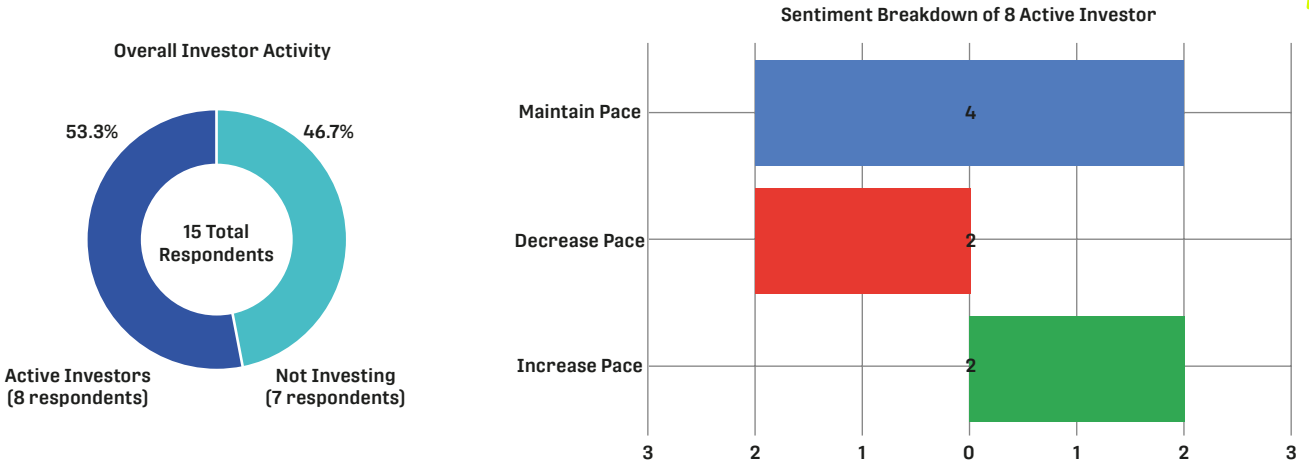


Figure 5.2.c. Analysis of investment pace in Lower Silesian Startups (2023–2024)

The majority of the investors (53.3%) were active in the last two years. Among those 8 active investors, sentiment was split evenly, with half maintaining their investment pace while the other half was divided between increasing and decreasing their activity.

The portfolio size among the survey respondents reveals a concentration of investors with smaller, more focused local portfolios, as seen in Figure 5.2.d.

This heatmap illustrates the relationship between an investor's overall investment portfolio size (x-axis) and their specific investment portfolio size within Lower Silesia (y-axis). The data indicates that most respondents manage smaller overall portfolios (1–7 companies) and have a concentrated presence in the region, with 1–3 local investments.

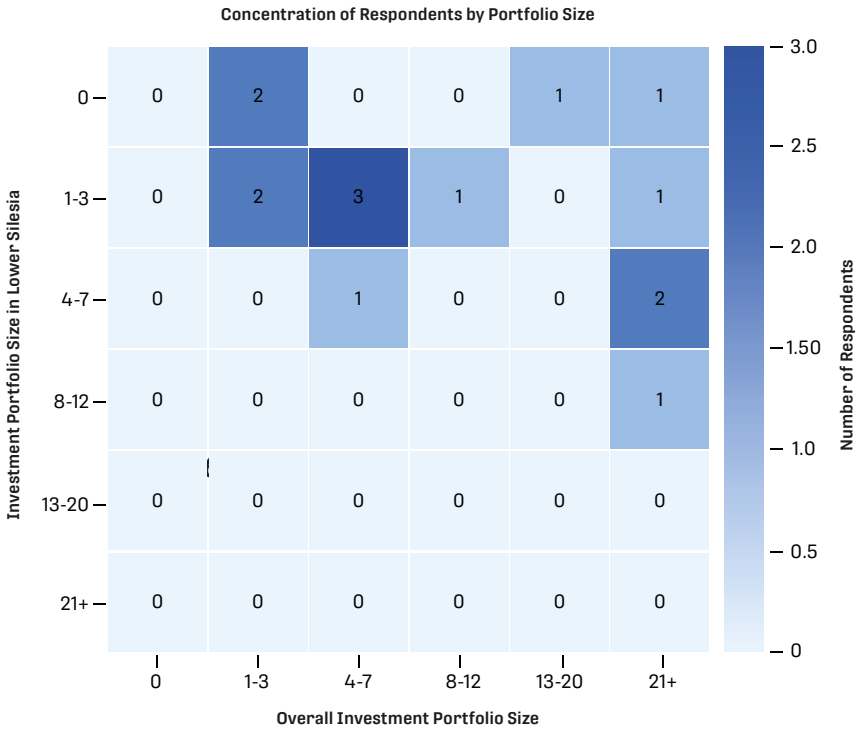


Figure 5.2.d. Concentration of respondents by portfolio size

A positive outlook for next 2-3 years

Despite recent market moderation, the forward-looking sentiment among investors is remarkably optimistic, signaling a strong belief in the ecosystem's fundamentals. The majority of the investors participating (87.5%, N=16) in the survey indicated that they were currently either actively or opportunistically looking to invest in a startup. See Figure 5.2.e.

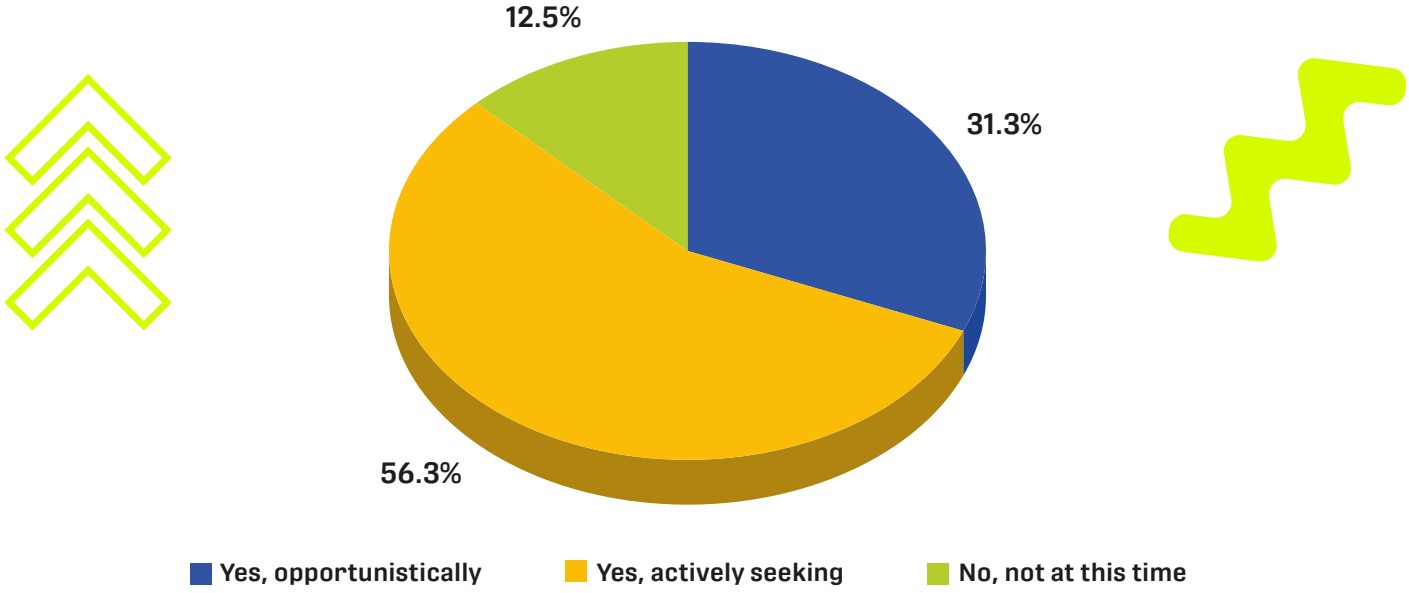


Figure 5.2.e. Current investor intent (N=16) (N = 16)

At the same time, forward-looking sentiment is remarkably optimistic, signaling a belief in the ecosystem's strong fundamentals. When asked about the future investment plans for Lower Silesia, none of the investors indicated that they plan to decrease their investment activity in the coming 2-3 years, see Figure 5.2.f.

The majority of the investors (62.5%) plan to increase their investment, and only a small group were uncertain about their future activity.

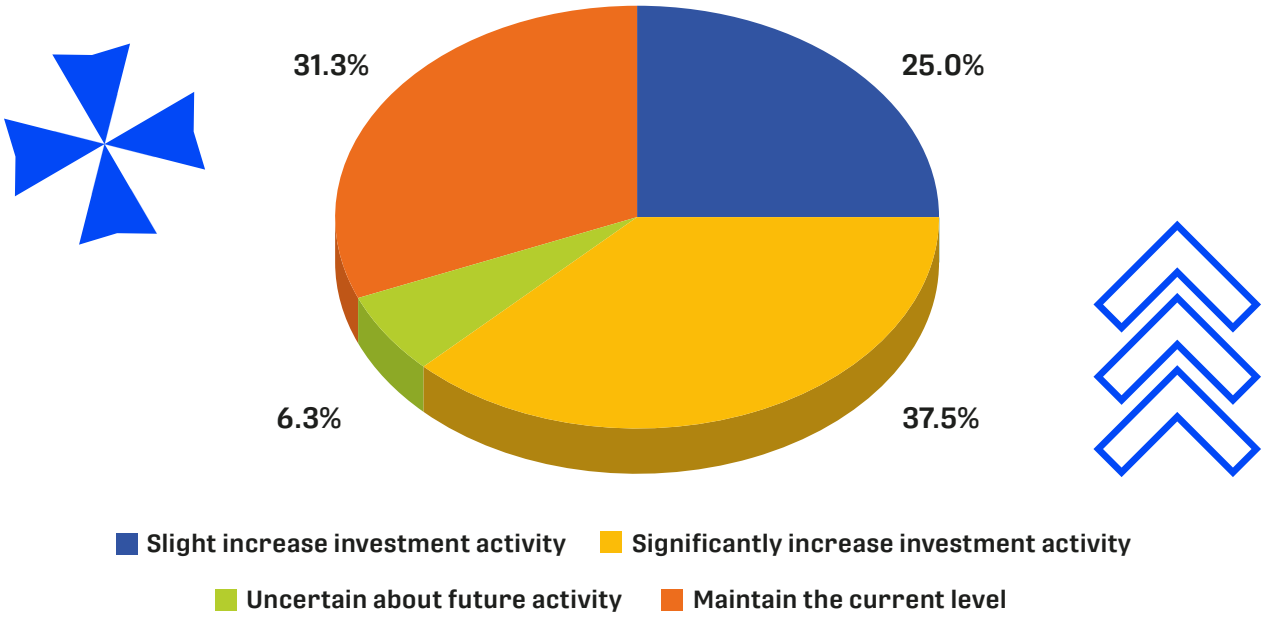


Figure 5.2.f. Planned investment activity for the next 2–3 years (N=16)

Investment drivers

Investment decisions are influenced by a blend of external macroeconomic factors and internal fund strategies.

Understanding what drives capital allocation is key to interpreting the ecosystem's health and potential.

The primary attractions of the region are its deep talent pool and robust support network, see Figure 5.2.g.

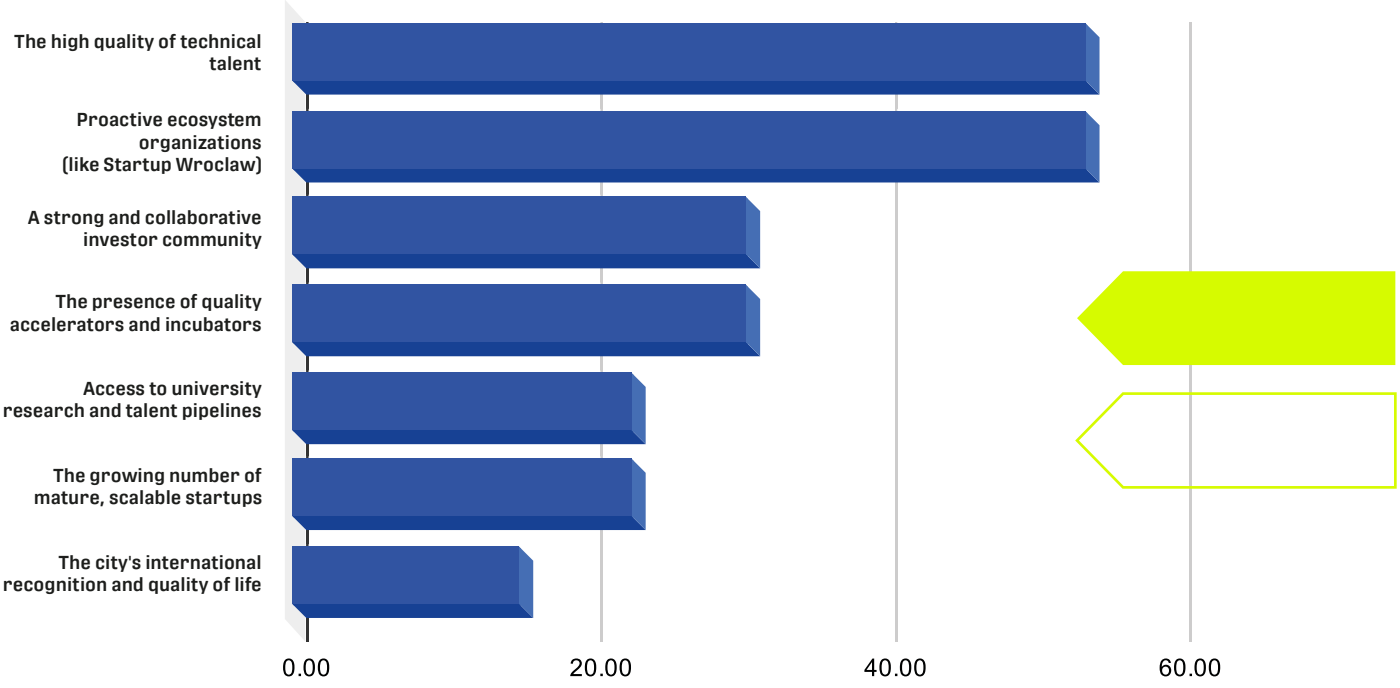


Figure 5.2.g. Key Factors Attracting Investment in Lower Silesia

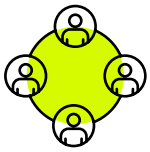
While the region's inherent strengths attract interest, the actual pace of investment is also governed by the following factors.

1. THE GENERAL MACROECONOMIC OUTLOOK IN POLAND/EUROPE

This was the most influential factor, highlighting the ecosystem's sensitivity to external economic shocks. Investment activity is strongly correlated with broader market sentiment.

2. PERCEIVED QUALITY AND MATURITY OF LOCAL STARTUPS/DEAL FLOW

While macro concerns are paramount, the fundamental quality of opportunities remains a key consideration for investors.



3. OUR FUND'S INTERNAL STRATEGY OR FOCUS

This reflects the natural cycles of fundraising and deployment that govern venture capital operations.

These factors suggest the ecosystem is still perceived as a "beta" play on the broader European tech market, rather than an "alpha"-generating hub capable of independently defying market cycles.

Investors add value, more than money

In Lower Silesia's competitive deal landscape, capital is table stakes. To truly stand out and win the best deals, investors must offer more. The most successful investors win by providing hands-on, strategic support that helps founders navigate the challenges of scaling a business.

THE VALUE-ADD STACK

As shown in Figure 5.2.h, investors provide a variety of support apart from providing capital. Interestingly, out the 16 investors who participated in the survey, only 1 indicated that they provide only capital primarily.

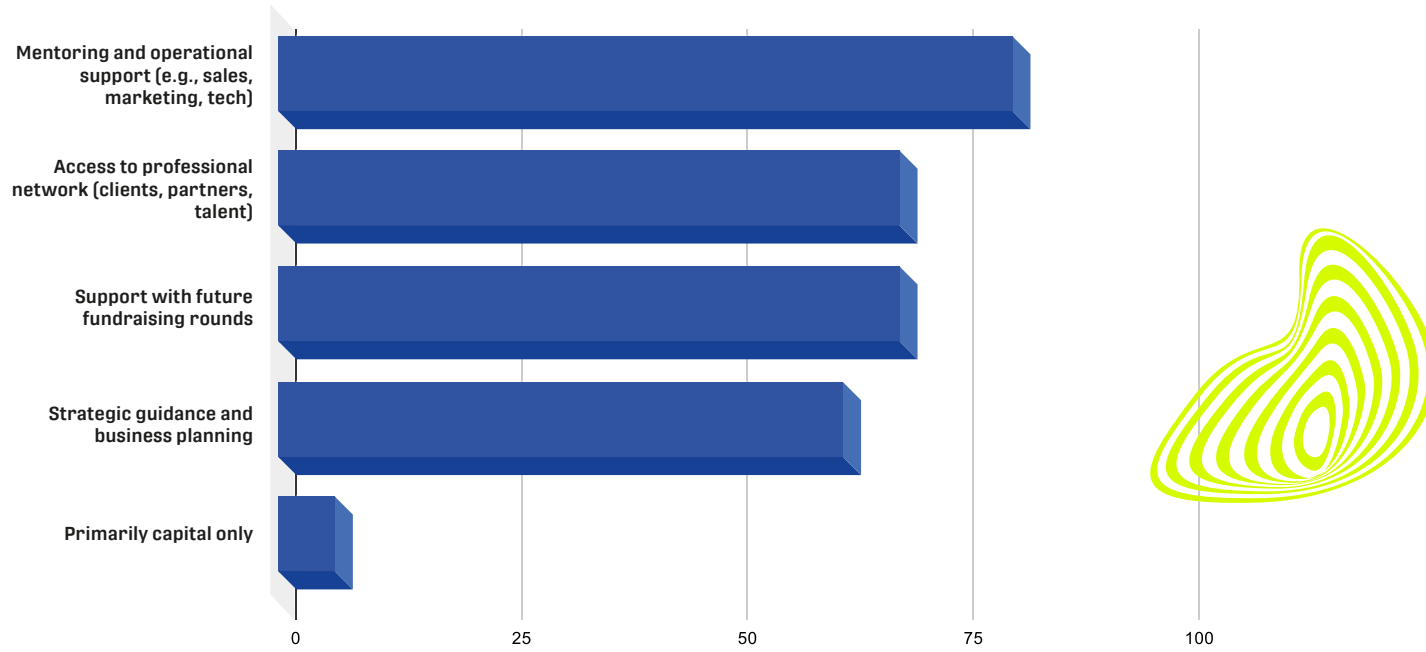


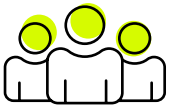
Figure 5.2.h. How investors add value beyond capital

The findings indicate a clear regional investment philosophy that is deeply rooted in partnership. Investors are expected to be active participants, offering guidance in sales and marketing, making key introductions to potential clients and partners, and assisting with future fundraising efforts. This hands-on approach is not just a benefit but a core expectation and practice in the ecosystem.

Perceived strengths of local startups

Investors see foundational excellence in the teams and technology coming out of Lower Silesia, but they also identify critical gaps between building a product and building a viable business.

TOP 3 OBSERVED STRENGTHS



THE TEAM

"The experience and cohesion of the founding team" was the most cited strength. Investors perceive teams as well-aligned, experienced, and capable of executing.

THE AMBITION

"Impressive scalability and large market potential" is a key positive. Founders are seen as tackling large, global problems rather than focusing only on niche local markets.

THE TECHNOLOGY

"Highly innovative or defensible technology/IP" reflects the region's deep pool of technical talent. Startups are developing genuinely innovative tech with strong competitive advantages.

The ecosystem excels at the core elements of company building: assembling strong teams and developing robust, ambitious technology.

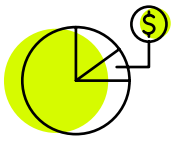
Perceived weaknesses and common hurdles

A critical disconnect exists between the ability to build a product and the ability to build a business around it.

TOP 3 OBSERVED WEAKNESSES

THE ASK

"Unrealistic valuation expectations" was a top concern. This mismatch between founder and investor perception is a major obstacle to closing funding rounds.



THE PROOF

"Insufficient market validation / product-market fit evidence" is a frequent issue. Startups often lack sufficient proof that a real market need exists for their compelling technology.

THE MODEL

"Lack of a clear business model / monetization strategy" is a closely related weakness. Thinking around revenue generation is often seen as underdeveloped.

This shows that the ecosystem is strong on **product and vision** but weak on **go-to-market and business acumen**. This points to a classic archetype of a technically-proficient but commercially-immature ecosystem.

The Ask & The Offer

Founder's development roadmap: An investor perspective

Investor feedback on the perceived weaknesses of local startups provides a clear, prioritized curriculum for founder development. To bridge the gap between technical proficiency and commercial maturity, founders should focus on mastering the core competencies of business building.

TOP RANKED AREAS WHERE STARTUPS NEED TO IMPROVE

1. **Sales & Business Development Strategy**

   Founders must develop a repeatable, scalable process for acquiring customers.

2. **International Expansion Strategy**

   Building on the observation that local startups have global ambitions, investors emphasize the need for a concrete strategy to enter foreign markets.

3. **Fundraising Strategy & Pitching**

   Founders are struggling to effectively communicate their value proposition, build data-driven financial models, and navigate the fundraising process.

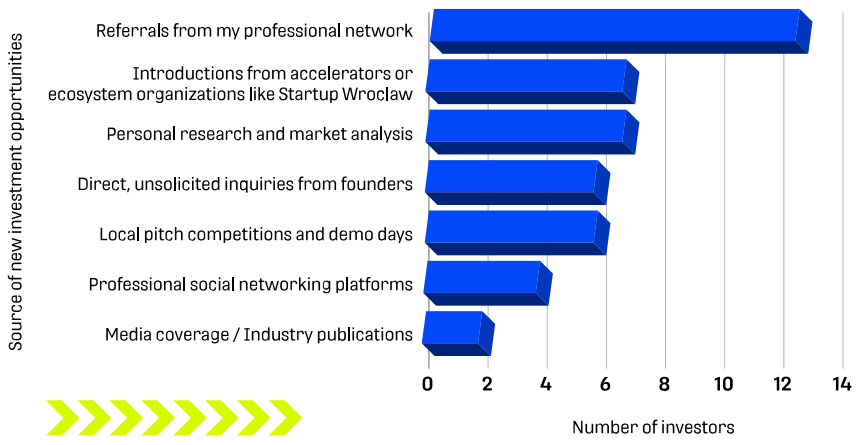
4. **Marketing & Customer Acquisition**

   Reinforces the need for stronger go-to-market skills, including digital marketing, customer segmentation, and efficient acquisition metrics.

This data-driven roadmap provides a clear directive for ecosystem builders: focus support programs on these core commercial competencies to help founders translate technical innovation into market success.

How do investors prefer to source new investment opportunities?

Understanding the pathways to capital is critical for founders. The data reveals that Lower Silesia's investment landscape is heavily relationship-driven, where warm introductions and established credibility significantly outweigh unsolicited approaches, see Figure 5.3.b.



Referrals from an investor's professional network and organizations like Startup Wroclaw or incubators/accelerators are preferred by almost all investors. This underscores the critical importance of networking for founders; a warm introduction is the most effective way to get an investor's attention. Participating in pitching competitions, and maintaining a strong, credible online presence is also recommended, as some investors are open to direct, unsolicited inquiries from founders.

Figure 5.3.b. Primary channels for investor deal sourcing (N=16)

Ecosystem dynamics of needs and contributions

This section explores what investors require from the Lower Silesian ecosystem, how they are willing to contribute back to its growth, and connection between the two. Understanding this dynamic is crucial for developing targeted initiatives that foster a more synergistic and self-sustaining investment community.

The heatmap in Table 5.3.a. was made by comparing answers from two survey questions: one on investor needs (rows) and one on how they want to contribute (columns). The darker the color in a cell, the more investors chose that specific combination of a need and a contribution.

Table 5.3.a. Investor engagement matrix: needs vs. contributions

		Investor's interest in contributing					
		Mentoring startups	Speaking at events / leading work-shops	Judging pitch com-petitions	Providing industry insights or trend analysis	Collabo-rating on ecosystem reports or initiatives	Not at this time
Investor's need from ecosystem	Curated deal-flow reports/ platforms	1	1	1	1	1	0
	Investor-only networking events	4	4	5	4	1	0
	Co-investment syndication support	3	3	5	2	2	1
	Access to reliable data/reports on the local ecosystem	2	2	3	2	0	0
	Facilitated introductions to relevant startups	5	5	4	2	4	0
	Platforms for connecting with potential co-investors or mentors	5	4	6	3	3	0
	Workshops/briefings on specific local tech trends or regulations	2	2	2	1	1	0

THE RESULTS SHOW A LINK BETWEEN WHAT INVESTORS WANT AND HOW THEY CHOOSE TO PARTICIPATE.

- Investors who need support with **networking and making connections** are the most likely to contribute their time. They show the most interest in **mentoring startups, speaking at events**, and judging **pitch competitions**.
- In contrast, investors who are mainly looking for **data, reports, and workshops** are far less likely to participate in these active community roles.
- Finally, **collaborating on ecosystem reports** was the least popular way to contribute among all investor groups.

Specialize or diversify?

A fundamental strategic question for any growing ecosystem is whether to focus its resources on developing a few key sector strengths or to foster a broad and diverse industrial base. In Lower Silesia, the investor community is notably divided on this issue, see Figure 5.3.b.

The data reveals no clear consensus, though a slight preference for diversity emerges with 46.2% of investors believing a diverse ecosystem without a specific focus is better, suggesting a belief that innovation can come from anywhere. However, a substantial 38.5% indicated that focusing on a few key strengths is beneficial, indicating a desire for a stronger regional brand and deeper concentration of talent and capital, while others were uncertain.

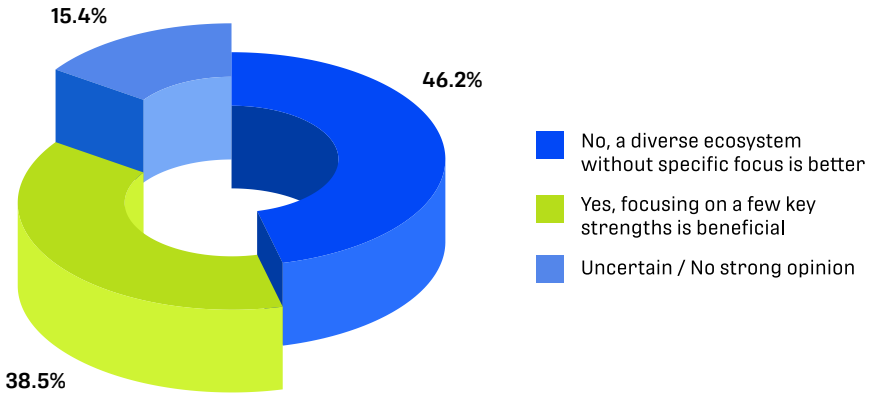


Figure 5.3.b. Investor opinion on ecosystem specialization

RECOMMENDED AREAS OF FOCUS

Despite the split opinion on strategy, when investors were asked to recommend specific sectors for focus, clear patterns emerged. These recommendations point toward a future anchored in high-value, knowledge-based industries, see Figure 5.3.c.

The treemap indicates that while investors may support diversity in principle, their recommendations center on the core of deep technology sectors. AI / Machine Learning, DeepTech and related fields are the most frequently cited areas, reflecting a strong belief in the region's deep pool of engineering talent.

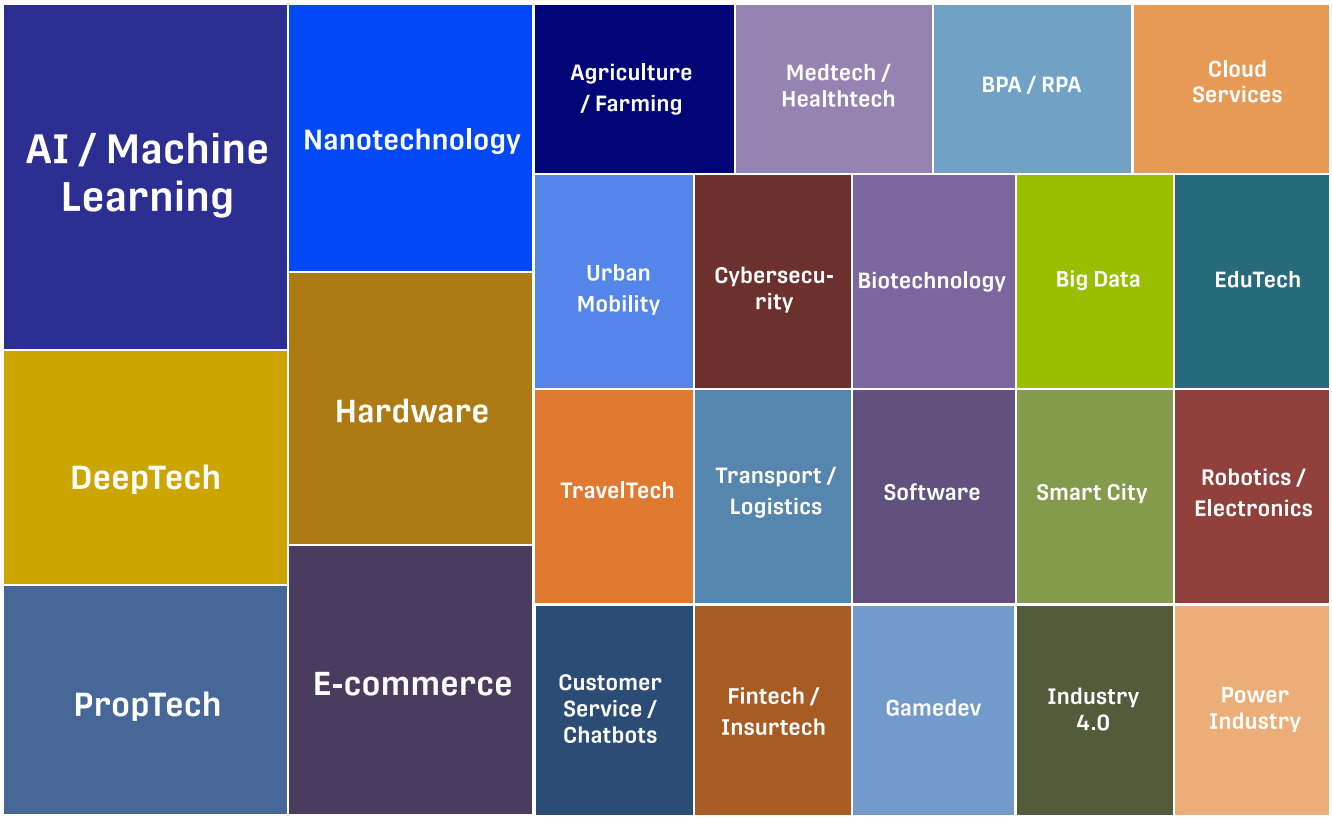


Figure 5.3.c. Investor-recommended sectors for regional focus

The path forward

Analysis in this report presents a clear mandate for regional stakeholders. To accelerate the ecosystem's maturity and secure its long-term competitiveness, three strategic imperatives must be addressed. These imperatives are designed to resolve the ecosystem's primary structural bottleneck, close the most critical skills gap, and amplify its inherent strengths on a global stage.

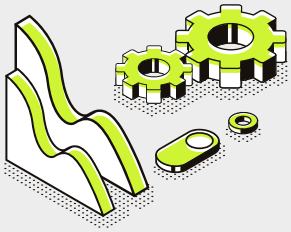
1

FROM TECH TALENT TO MARKET LEADERS

The region produces brilliant tech and cohesive teams, but struggles to build businesses around them. The primary challenge is a commercialization gap. We must transform technical founders into market-savvy leaders by launching intensive, hands-on programs focused laser-sharply on the top three identified needs: Sales & Business Development, Fundraising Strategy, and International Expansion.

2

FUELING THE GROWTH ENGINE



A critical "capital crowd" exists at the seed stage, but a stark Series A funding gap forces our best companies to leave the region to scale. This is the ecosystem's single greatest strategic risk. The solution is to act as a "super-connector" by proactively marketing our top scale-ups to growth-stage investors in Warsaw, Berlin, and London, and by facilitating local co-investment syndicates capable of writing the crucial first €1M+ checks.

3

PUTTING LOWER SILESIA ON THE GLOBAL MAP

To attract global capital and talent, the ecosystem needs a stronger international brand. While investors are split on specialization, their top sector picks provide a clear mandate. We must formally brand and promote Lower Silesia as a European hub for AI, DeepTech, and Industry 4.0, showcasing success stories like Infermedica and SatRev on the global stage to validate the region's strength in creating world-class technology.


Startup


WallStreet 29
STARTUPY. ANIOŁOWIE
DOLNY ŚLĄSK

Wroclaw
Tech Business
Angels Club

Building capital, knowledge and policy for startups and investors

Founded in 2023, the Wroclaw Tech Business Angels Club (WTBAC) is a network of top managers, private investors, and industry experts from Poland's Lower Silesia region. The club was created by Ventures21 and Startup Wroclaw (ARAW) to connect smart capital, business experience, and influential networks to accelerate high-potential startups and elevate angel investing in Poland. The club has over 30 members as of 2025.

VALUE PROPOSITIONS

For investors

- **Curated dealflow**
  Priority access to high-quality, early-stage startups.
- **Knowledge and networking**
  Regular pitch sessions, conferences, seminars, webinars, and workshops.
- **Co-investment**
  A trusted platform for sharing best practices and co-investing.

For startups

- **Funding and mentoring**
  Funding combined with hands-on guidance from seasoned professionals.
- **Network exposure**
  Direct access to a high-quality network of decision-makers.
- **Strategic guidance**
  Support in business modeling, scaling, and go-to-market strategies.

For ecosystem

- **Ecosystem growth**
  Active collaboration with Startup Wroclaw, accelerators, VC funds, and EU institutions to promote Lower Silesia as a top CEE innovation hub.
- **Policy and advocacy**
  Initiating national dialogue on tax incentives, co-investment schemes, and regulatory reforms to strengthen Poland's early-stage investment environment.

FLAGSHIP EVENTS 2025

- **WRO Venture Connect (March)**
  A premier event in Wrocław, connecting business angels, VCs, and founders. It fills a critical gap by directly linking capital with promising local innovation.
- **WallStreet Startupy (May)**
  A specific event focused on angel investing, startups, and exits, organized as part of the larger WallStreet investment conference. The event concluded with an open letter urging systemic changes to support private capital in Poland.

> We believe that smart capital, combined with practical experience and a strong policy voice, can transform Poland's startup landscape. Wrocław has the talent, ideas, and ambition - WTBAC's mission is to ensure the funding and conditions match it.
>
> *Piotr Krzysztofik (Ventures21, WTBAC)*

FEATURED INVESTMENTS

goMeetiFy
spotkaj, twórz, przeżywaj!
www.gomeetify.pl

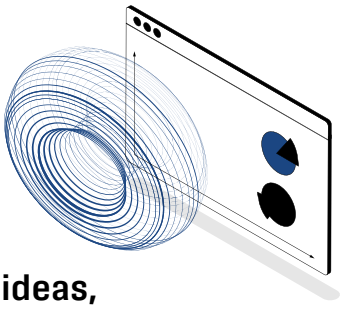
smabbler
www.smabbler.com

THE FUTURE

WTBAC plans to expand its investor community, increase national and international visibility through partnerships, and strengthen lobbying efforts for tax relief and co-investment programs in Poland. The club will also continue to host flagship conferences to serve as key meeting points for investors and founders in Central and Eastern Europe.

Get in touch with WTBAC and submit your pitch deck:

Uncovering opportunities in startup investments



Behind every high-performing startup lies an ecosystem designed for success. It is the synergy of visionary founders, groundbreaking ideas, fertile ground for building next-gen technologies, and smart, collaborative investors that turns potential into exponential growth.

WHAT IS MOST IMPORTANT FOR THE DEVELOPMENT OF STARTUPS IN LOWER SILESIA TODAY?

The high availability of technological resources in the capital of Lower Silesia and good universities is certainly very important. There are many ambitious, talented founders and institutions supporting the development of startup projects. Openness to neighboring markets, cross-border cooperation in the exchange of knowledge, and the availability of foreign capital are also significant factors.

Of course, we cannot overlook the knowledgeable, experienced business angels and investment funds operating in this region, which support startups financially but also operationally, sharing their know-how and network, with experience in scaling and a global approach to business.

This creates a complementary picture of the necessary factors that must mesh together for startups to have a chance to develop in the real market - where a unique idea or sophisticated technology is just as important as execution or scalability.

> **Acceleration and facilitation institutions, which are very active in Wrocław, play a huge role in this, as they are a "platform" for the transfer of knowledge, experience, and contacts in the local startup venture ecosystem.**

WHAT NEEDS TO HAPPEN FOR A FINTECH PROJECT TO BE SUCCESSFUL?

In many areas, the world of financial technology is still a vast blue ocean, where founders - the creators of payment solutions - have the opportunity to find niches for their ideas.

Therefore, one of the most important factors determining whether a startup has a chance of success is to **research and clarify what measurable, costly market problem in the fintech area needs to be addressed.**

Validating the idea and assessing the chances for scalability and the role of the technological factor are further necessary milestones. When we think about the scalability of fintech, we need to take into account the global conditions of individual markets.

> **Combining talent, capital, global ambitions, and the cooperation of many supportive communities can be the "recipe for success" for a fintech startup.**
>
> *Wojciech Pysiewicz*

Founders' experience in the world of financial technology will certainly make it easier to run such a business, help understand the philosophy of payments, make more realistic strategies, target markets more accurately, etc. "Our fund experience tells us that the most important factor is probably a founder who understands the world of financial technology. Someone who not only sees trends, but also takes a global view. They notice business nuances, such as the fact that the development of such a startup in global terms is not only about increasing sales, but also about developing competencies, looking for niches in the market – requiring specific product development, with a chance to show their competitiveness, but also groups of customers ready for the product. When thinking about global sales, it is worth immediately anchoring it in cultural realities – because this determines sales arguments, approach to strategy, etc." says Wojciech Pysiewicz, co-founder and manager of the WP2 Investments fund.

WP2 INVESTMENTS' EXPERIENCE IN WORKING WITH STARTUPS

Payment technologies were the first investment area we decided to engage in several years ago when we started our venture capital business. Today, it remains one of the three main pillars of our portfolio.

WP2 Investments' fintech portfolio consists of **9 companies in the payments sector**, offering state-of-the-art financial technologies such as card issuance, debt transactions, business expense management, cryptocurrencies, and financial analytics. The firms in our portfolio are: Fenige, Quicko Poland, Verestro, GoPay, Sparados, Sportigio, P100, BidFinance, and Self Learning Solutions.

The total revenue of **$240 million PLN** generated by these companies in one year (in the last four closed quarters, Q2 2024 - Q1 2025) is proof that this is a growing industry with great prospects, offering the opportunity to return the fund's capital. An additional advantage is the very rapid growth rate of these startups - the above result **increased by 74%** compared to the same period in the previous year (Q2 2023 - Q1 2024). Most of the above-mentioned companies operate internationally, two of them **in dozens of countries around the world on different continents. 85% of revenues come from foreign sales**.

WP² INVESTMENTS
everything squared

In addition to impressive results and business growth, our portfolio companies constitute a significant part of the Polish fintech market, as evidenced by the presence of five of them on the latest Polish Fintech Map 2025, created by Cashless, as well as the award for Fenige for the "fintech of the year" project - Blik-to-card. Two of them are licensed payment institutions (Quicko and Fenige).

The previous international experience of our fund's managers in the field of finance and many years of cooperation with companies that create and sell financial technologies have led us to specialize in investments in this industry.

SUMMARY OF OUR FINTECH STARTUPS

30+
portfolio companies.

100+
extraordinary founders/managers of companies in our portfolio.

240 mln PLN
in revenue for our fintech companies in the last twelve months!

74%
increase of results compared to the same period last year (Q2 2023 - Q1 2024).

9
companies in the areas of payments, card issuance, debt transactions, business expense management, cryptocurrencies, and financial analytics.

3 phillars
fintech is one of the 3 main pillars of our portfolio, alongside green energy and impact/tech/AI.

Startup:

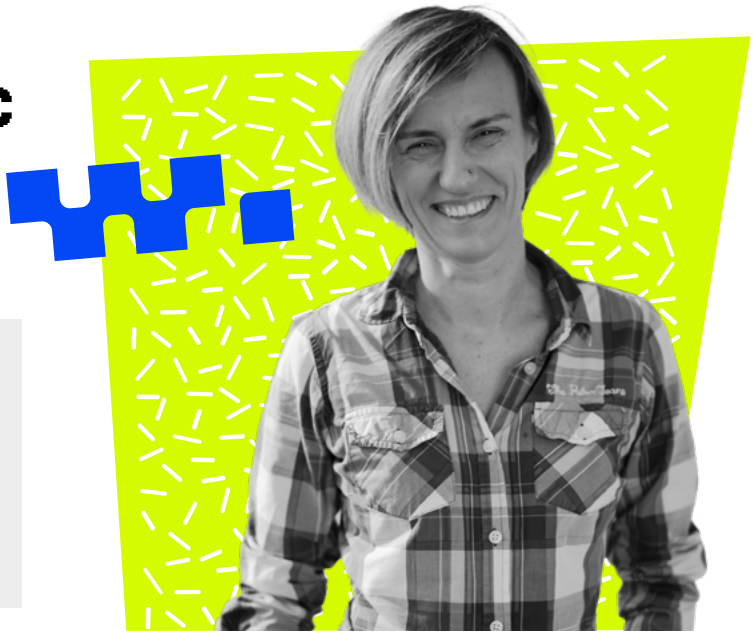
Investor:

Investor Comments

To truly grasp the pulse of the Lower Silesian startup scene, we must listen to the voices of those who commit their capital and expertise. In this special feature, we turn to leading investors for their unvarnished insights into the region's unique dynamics. What's genuinely propelling innovation here? What hidden gaps are preventing its global breakthrough? Investors are ready to talk - not just about the successes, but the critical challenges too. From their vantage point, we explore the paradoxes of growth and the strategic shifts needed. Their insights are not just a commentary; they are a vital roadmap and a jolt of inspiration for what comes next.

Magdalena Surowiec

Managing Partner
Unfold.VC



BIO

Managing Partner at Unfold.VC. Mediator at the Mediation Center and consultant for diagnostic testing dedicated to leaders - L.E.A.D. Between 2017 and 2025, she served as a Member of the Supervisory Boards, among others in Genomtec S.A., Bioceltix S.A., Intelliseq S.A., and TimeCamp S.A.

If you were to identify missing activities and institutions in the startup ecosystem that should operate locally, what would they be?

The key strength of the Lower Silesian ecosystem lies in the regular meetings and acceleration programs organized by Startup Wroclaw, as well as the initiatives undertaken by local universities and incubators. These activities provide valuable opportunities to build networks and gain the knowledge essential for launching a startup. They also foster a strong culture of entrepreneurship across the region. At the same time, during many of these events, I often get the impression of meeting the same group of people and founders, who share insights that rarely go beyond the very first stages of building a business. What I feel is missing are genuine role models, teams and founders who have advanced much further in their journeys.

It would be extremely valuable to have them appear more often at such events to share their experiences and respond to questions from aspiring founders. And such teams do exist in our ecosystem. Some are listed on the stock exchange, others have attracted international investors. What the ecosystem clearly needs is more educational opportunities and stronger role models, leaders who truly implement innovative projects, rather than just practicing the startup lifestyle.

If you could transfer one proven element from another ecosystem, what would it be and how would you adapt it to the local context?

Startup Wroclaw is an extremely important initiative that creates a platform for meetings and knowledge exchange. What's more, its events are always well-organized, fostering a culture of openness and collaboration. At the same time, I believe our ecosystem needs a larger initiative that would integrate the many different communities in Lower Silesia including university incubators and accelerators, VC funds, and private investors. Today, every university, such as

Wrocław University of Technology, SWPS University, or the University of Economics and Business, runs its own meetings and incubation programs, but these are usually small and closed in scope. What we are missing is true integration and interdisciplinarity. Recently, I had the chance to attend the PODIM conference, which brings together the entire startup ecosystem of the Alpy-Adria and Western Balkans region. The event connected startups, scientists, venture funds, and private investors from several countries including Slovenia, Croatia, Serbia, Albania, and Austria. On top of that, it featured leaders representing some of the strongest startup brands in the region. Participating in such an event gave me a real sense of strength and vitality, but also the chance for meaningful knowledge exchange. That is exactly what we need in Lower Silesia.

Wojciech Mróz

Entrepreneur, mentor, and psychologist

BIO

Entrepreneur with 20 years of professional experience. He successfully built and then sold an IT company, which achieved an average annual revenue growth of over 800% and ranked 18th in the Deloitte Technology Fast 50 Central Europe 2019 ranking. Co-founder of the Everest Foundation, an alumnus of The Leadership Academy for Poland and a teaching assistant for the Advanced Leadership Program.

What is the Lower Silesian ecosystem doing well... but what paradoxically could slow it down in the long term?

As a psychologist, I observe that a strong community support, openness to innovation, and collaboration within the Lower Silesian ecosystem foster creativity and growth. However, paradoxically, rapid growth and high competitiveness can lead to burnout, stress, and a culture of constant overachievement. In the long term, this pressure to succeed might diminish creativity and lead to fatigue or disillusionment among entrepreneurs and workers.

Additionally, an overemphasis on success metrics may cause neglect of mental health and work-life balance, resulting in burnout clusters and lowered resilience. To sustain long-term development, it is crucial to promote well-being, encourage genuine work-life harmony, and foster a culture that values mental health alongside innovation. Balancing ambition with self-care can help prevent the ecosystem from becoming a high-pressure environment that stifles sustainable growth and mental resilience.

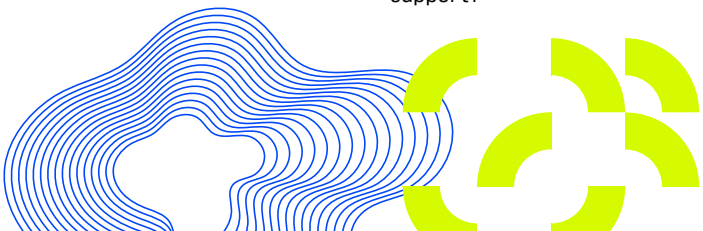
Are we truly a supportive community for each other — or do we just like to say that we are? If so, how do we support each other?

In our community, there are many events where entrepreneurs can meet, share experiences, and inspire each other. Young people have the opportunity to listen to more experienced ones, and there are more and more "business angels" on the market eager to support new initiatives. However, the important question to ask is: is this just a pat on the back for those who have succeeded, and do we only expect success from them? Or are we truly able to learn from failures and genuinely support those who haven't succeeded yet?

Do we have a support system for entrepreneurs who have not achieved success yet, or do we only focus on promoting winners? After all, a true community should allow learning from mistakes and support growth both during and after failures. The key question is: is our community just applause for the best, or an empathetic environment for mutual learning and support?

Is trust a value for you? Do you identify it as one of the main assets of the local startup community?

Trust is fundamental to healthy relationships and community resilience. It fosters a sense of safety, openness, and collaboration, which are essential for innovation and risk-taking in startup environments. When individuals and teams trust each other, they are more willing to share ideas, admit mistakes, and support one another, creating a positive feedback loop that strengthens the entire ecosystem. However, if trust is lacking, relationships become guarded, communication suffers, and the environment can turn toxic or transactional, hindering genuine growth. For a vibrant startup community, trust isn't just a nice-to-have — it is a crucial social capital that enables collective strength, resilience, and long-term success. Without trust, even the most promising assets can remain underutilized or ineffective.



Have startups become for Gen Z what corporations were for millennials only with better branding and a greater illusion of freedom?

It is fascinating how work narratives evolve across generations. Millennials associated success with the corporate ladder—stability and benefits, but also limitations. Gen Z increasingly turns to startups, drawn by the promise of freedom and impact. But is this just another myth? Today, thanks to the power of AI, you can create a digital product in a day and start selling it immediately—making the world seem wide open.

This apparent democratization challenges the old status quo and offers hope that anyone can be an entrepreneur. Yet, the sheer volume of people taking this route means that both opportunities and failures multiply rapidly. Access is broad, but not everyone truly finds the doors open. Startups are no longer just the realm of dreamers but a continuation of the race—with new logos, modern tools, and also the trap of illusions: that freedom means no limits, and success is only a matter of courage or cunning. Ultimately, I encourage everyone to deeply consider their own path. Whether that is entrepreneurship or working for someone else, the choice should be guided above all by the voice of one's heart. There is no one-size-fits-all formula—true fulfillment comes from following what feels right individually.

Tomasz Karwatka

Catch The Tornado

BIO

Entrepreneur and investor. His mission is to help Polish entrepreneurs build global companies. He is especially interested in enterprise software and healthtech. He co-founded companies like Divante, Vue Storefront (YC), Callstack, and Open Loyalty. He also started NGOs like Tech To The Rescue, MD Fellowship, and Las Na Zawsze.

Currently, he runs Catch The Tornado — a company supporting tech entrepreneurs with investments and advice. Some of CTT's investments include Eleven Labs, Wordware, and cyber_Folks.

What is the Lower Silesian ecosystem doing well... but what, paradoxically, could slow it down in the long term?

We do one thing very well: we build solid, profitable service companies (software houses). We are excellent at this. We have fantastic engineers, and we have proven we can create organizations that win global clients and generate real profit. My companies, Divante, Callstack, Rigby are the best proof of this. Paradoxically, this is also our biggest trap. Focusing on services, which are safer and bring in cash faster, makes us afraid to take the risk of building global products from scratch. The mentality is: "Let's build a software house, and then we will think about a product." I did this myself and I know how painful and difficult the later pivot to a global product is.

Are we really a supportive community or do we just like to say that about ourselves? If so, how do we support each other?

We are starting to be, but we have a long way to go. A supportive community is not just about making nice introductions for each other. Real support is about something different - supporting Entrepreneurship in Others: Your best employee leaves to start their own company? That is great! I invest in people like that because I know they have the right DNA. 30 companies have been started by former Divante employees, and I am a partner in several of them. That is real support.

What is the biggest untold story of the Lower Silesian startup ecosystem?

The biggest untold story is the power of "boring service companies". Everyone is chasing the unicorn, but its service companies have built real, lasting value. They generated tens of millions in profit , employed hundreds of great specialists, and most importantly, became incubators for the next global successes by funding and providing know-how to companies like Vue Storefront and Open Loyalty. This is the story of how a solid, profitable business can become the foundation for an entire ecosystem.

Can you cite a failure of the ecosystem that has been forgotten / is not talked about but we should talk about it openly because it could save us in the future?

The failure is not a single company, but an entire pattern of thinking: starting in Poland first. It was my biggest mistake, which I made with Divante. The feeling that "we will test it on the local market

first" is a trap. You end up building a company with a DNA tailored for a small, specific market. The team, the processes, the marketing—everything is local. Trying to pivot to a global market from that position is extremely difficult, expensive, and usually ends in failure. We have to say this openly: if you are building technology, think globally from day one. Otherwise, you are just asking for trouble.

If you were to identify missing activities and institutions in the startup ecosystem that should operate locally, what would they be?

We do not need more formal institutions; we need more effective, informal platforms for exchanging knowledge and capital.

- More angel investor syndicates: Small groups of trusted, exited founders who can invest quickly and efficiently in the next generation.
- More mentoring programs: Like the MD Fellowship I am creating, where experience meets ambition.
- More "Consultants" (with a capital C): Practitioners who have actually built something and made mistakes, not theorists with certificates.
- More spaces for honest conversations: Without a sales agenda, where founders can openly talk about their problems. This is what we try to do within our Product Dots community.

How would you change the way Wrocław/Lower Silesia "tells its story" to the startup world?

I would stop talking about how "we have good engineers." Everyone knows that by now, and it is not a unique selling point. Instead, I would tell the success stories of global products that came from here. I would tell the story of Divante's exit. The multi-million dollar funding rounds of Vue Storefront. The profitability of Callstack. The fact that Eleven Labs is a unicorn backed by 3 BAs from Wrocław.

What are the biggest invisible barriers to entering the ecosystem? Why these in particular?

The biggest barrier is mental. It is a lack of role models and visible successes, which leads to a lack of boldness. A young person doesn't see people in their circle who have succeeded with a startup, so they do not believe it is possible.

Their "rich uncle" would rather buy an apartment to rent out than invest in their idea. The myth that 3F (Friends, Family, Fools) funding works in Poland like it does in the US is false. This disbelief and the lack of capital at the earliest stage is a powerful, invisible barrier.

How has the availability of capital in Wrocław and Lower Silesia changed over the last 5 years?

It is worlds better, but starting is still hard. We have more VC funds, more business angels, and exits are pumping capital and know-how back into the market. However, there is still a gap at the pre-seed/seed stage, precisely because the 3F model doesn't work here. That is why the role of business angels and small syndicates is absolutely critical.

If you could transfer one proven element from another ecosystem, what would it be and how would you adapt it to the local context?

I would import a mindset, not a specific solution. The one Marc Andreessen wrote about in his essay "It is Time to Build". A mentality that tells you to stop complaining about regulations and your environment and just start building. The Silicon Valley mentality of paying it forward—those who succeed feel a moral obligation to help the next wave. We need that more than anything.

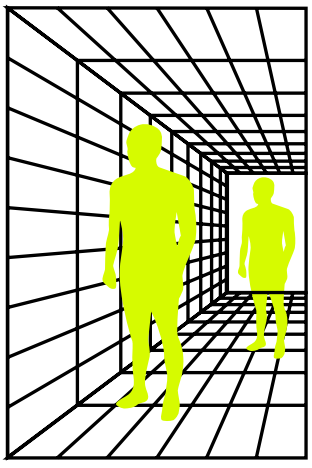
What kind of support do you expect at the EU, national, regional, and local levels?

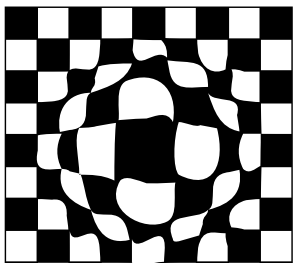
I do not expect free money. Grants for software startups are often an anchor, not a booster—bureaucracy kills agility. I expect the administration toget out of the way.

- Simplify laws: Especially company law and employee stock options (ESOPs), to make them simple and attractive.
- Promote successes: Use the tools of economic diplomacy to promote Polish tech companies on the world stage.
- Educate from a young age: Support entrepreneurship from the earliest years. Do not let the city guard chase away kids selling lemonade. That is a lesson no school can provide.

Have startups become for Gen Z what corporations were for millennials only with better branding and a greater illusion of freedom?

This is a sharp and very accurate question. There is a risk of that. The branding is better: beanbags, free coffee, and the illusion of a "flat structure." But the pressure is often more brutal, and the risk is incomparably higher. My advice for Gen Z is simple: before you found a startup, go work for a fast-growing startup first. See the chaos, the pressure, and the incredible joy when something works. See that it is not a 9-to-5 job. It is a mission. If, after that experience, you still want to be a founder, then you have the right DNA.





The corporate view point

Understanding the corporate perspective is essential for assessing the health and potential of any startup ecosystem. Corporations are not just potential clients or investors for startups; they are critical partners that can provide scale, market access, and industry expertise. This section discusses the views of corporations on the Lower Silesian startup landscape, exploring their engagement levels, strategic interests, and perceived challenges. The analysis is based on the Startup Wroclaw survey in which 16 corporations/enterprises participated. To ground the analysis, we first look at the composition of the corporations that participated in the survey. As shown in Figure 6.a, these organizations span a wide range of industries, from traditional sectors like Automotive and Banking to cutting-edge fields such as AI/Machine Learning and Fintech. Interestingly, MedTech startups were one of the largest portions among the survey participants, however no corporation from this sector was among the survey participants. This indicates a scope for MedTech or HealthTech corporations to engage with the ecosystem. For the purposes of this report, the respondents have been categorized into two groups: 9 corporations are classified as "Non-tech focused" and 7 as "Tech-focused," a distinction that will be used throughout the subsequent analysis.

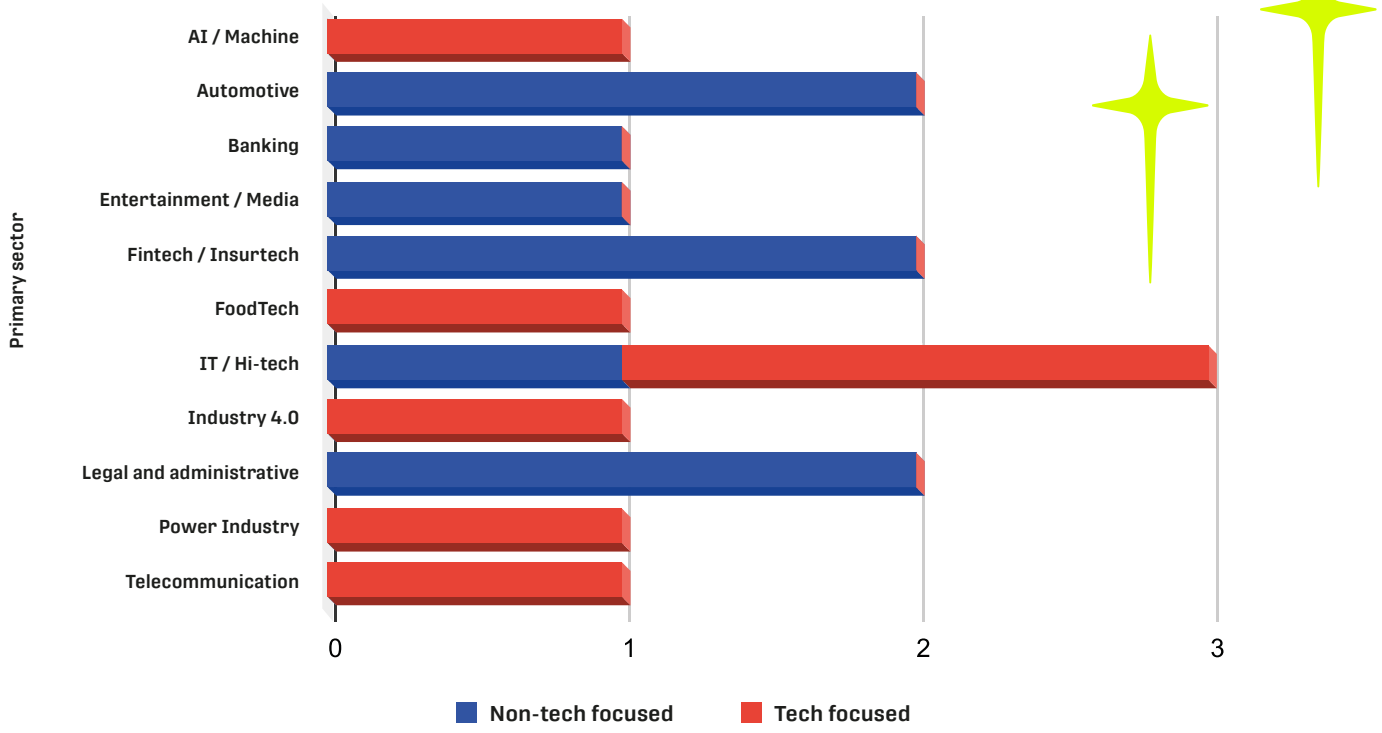


Figure 6.a. Distribution of surveyed corporations by their primary sector and focus type (N=16, survey data)

The survey results indicate that corporations in Lower Silesia are already interacting with the startup ecosystem. This is not a nascent relationship but one with an existing foundation. Only 3 of the 16 respondents indicated they have no engagement with startups, while half of the corporations (8 out of 16) reported being "slightly engaged." This broad, initial level of interaction across the corporate landscape highlights a significant opportunity to deepen these relationships and foster more impactful collaborations in the future.

Corporations view startups as...

Beyond simple engagement, it is crucial to understand how corporations perceive the role of startups within their strategic framework. Do they see them as sources of innovation, potential competitors, or channels for new talent? The survey data reveals that startups are viewed through multiple lenses, with a corporation's own industry and technological focus heavily influencing its perspective. Figures 6.b. And 6.c., break down these varied viewpoints, first by the tech versus non-tech classification and then by primary industrial sector.

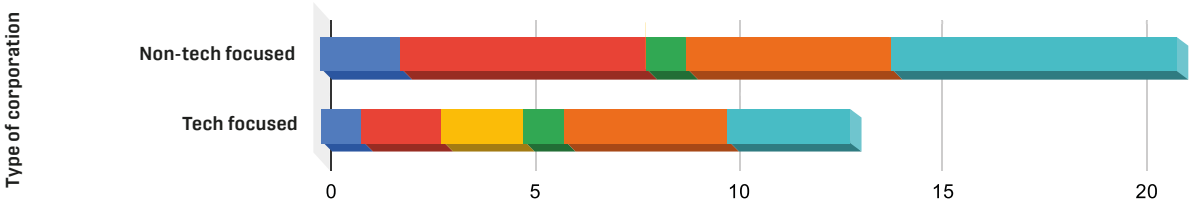


Figure 6.b. Corporate perspectives on the strategic role of startups, comparing Non-tech and Tech focused corporations (N=16, survey data)

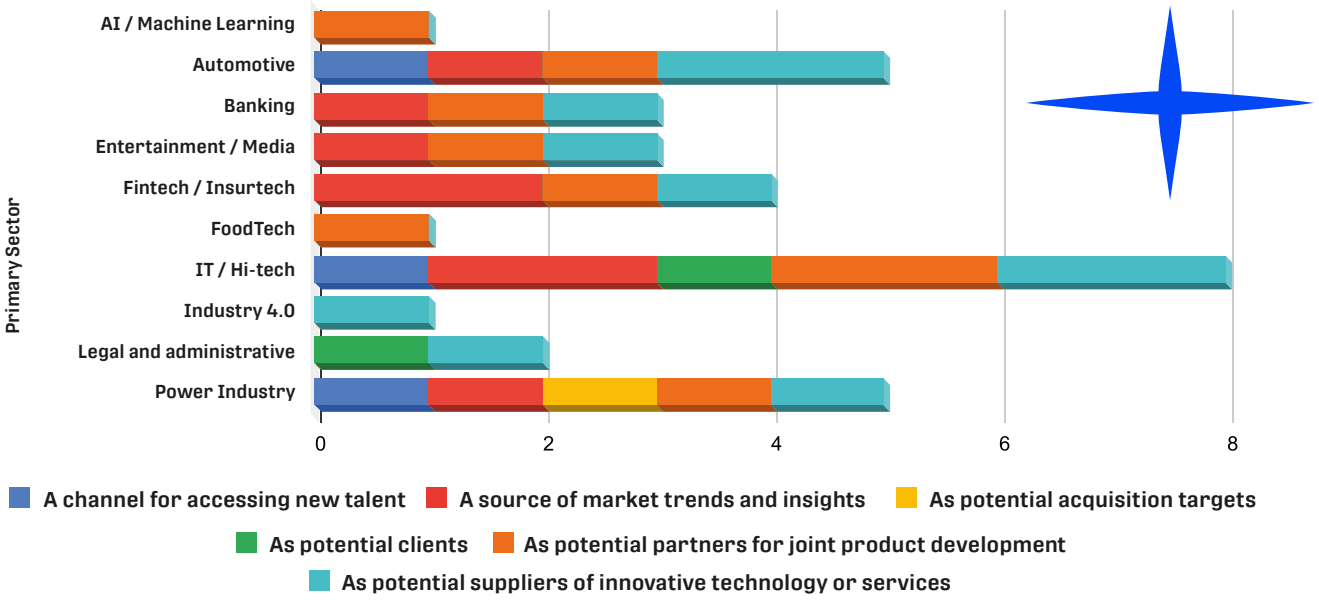


Figure 6.c. A breakdown of corporate perspectives on the strategic role of startups by primary sector (N=16, survey data)

Non-tech focused corporations primarily view startups pragmatically, seeing them as "potential partners for joint product development" and "potential suppliers of innovative technology or services." In contrast, Tech-focused corporations hold a more balanced view, adding significant value to startups as "a source of market trends and insights" and as "potential acquisition targets." This strategic outlook becomes even clearer when analyzed by industry. The IT / Hi-tech sector, for instance, engages with startups across a diverse spectrum of roles. Corporations in the Automotive sector focus more specifically, viewing startups mainly as partners and suppliers for new technology. Uniquely, firms in the Legal and administrative sector stand out by primarily seeing startups as "potential clients," indicating a supportive, service-oriented relationship within the Lower Silesian ecosystem.

Corporate viewpoint on startup quality and maturity

A successful collaboration hinges not only on strategic alignment but also on the perceived quality and maturity of the startups themselves. To gauge this, the survey asked corporations to rate the general quality of the startups they encounter from the Lower Silesian ecosystem. The responses, illustrated in the Figures 6.d. and 6.e. below, provide a look at how established companies view the readiness and capabilities of local ventures.

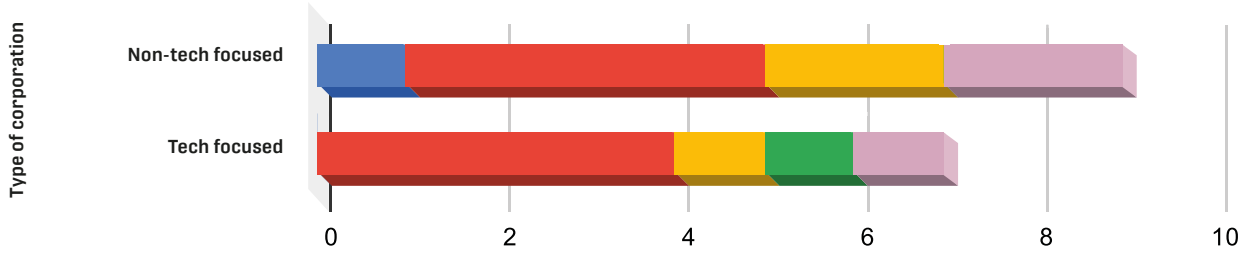


Figure 6.d. General quality and maturity of Lower Silesian startups as rated by Non-tech and Tech focused corporations (N=16, survey data)

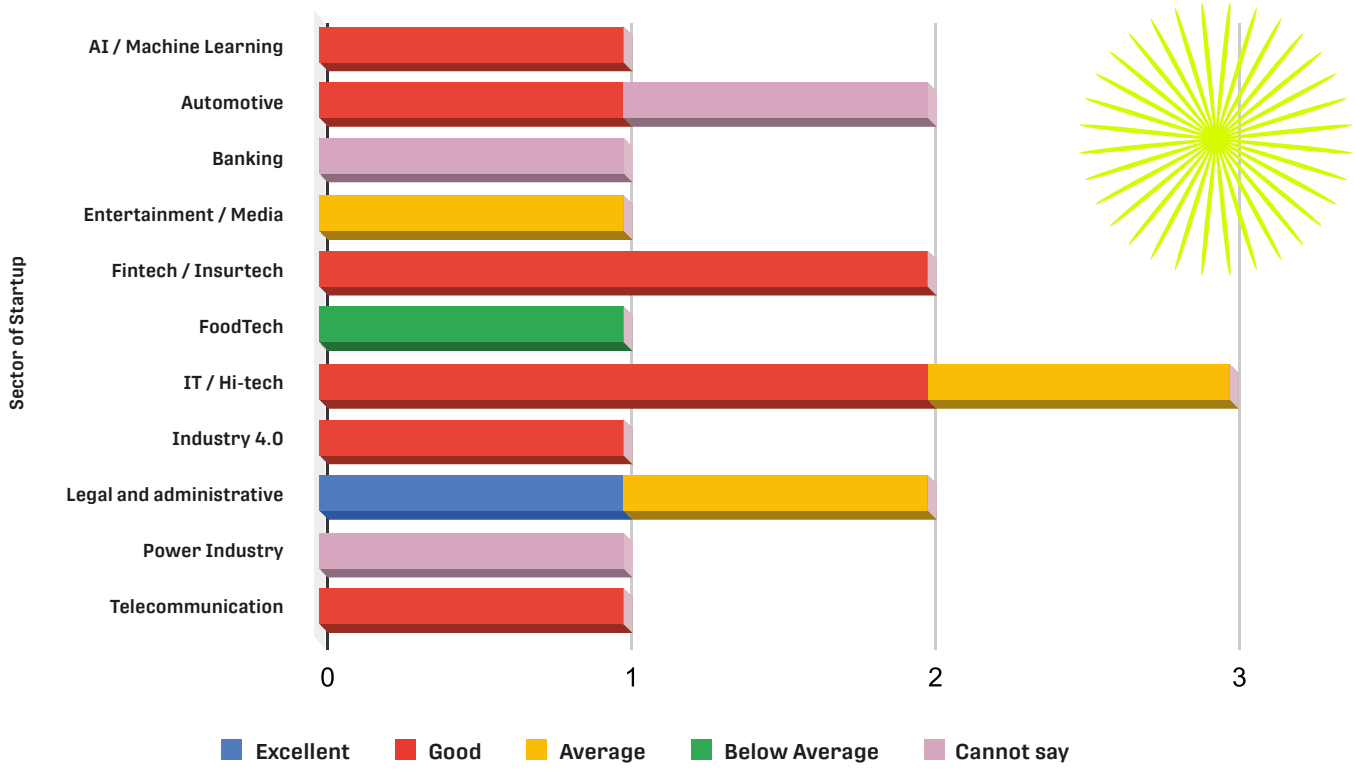


Figure 6.e. Perceived quality and maturity of startups broken down by their specific sector (N=16, survey data)

The overall assessment from corporations is optimistic, clustering around "Good" and "Average" ratings. This sentiment is shared by both Tech and Non-tech focused companies, suggesting a consistent view across the corporate landscape. Notably, an "Excellent" rating is rare, and a significant portion of respondents selected "Cannot say," which may indicate that many corporations have not yet had deep enough interactions to form a definitive opinion. When viewed by sector, the feedback becomes more specific. Corporations in the IT / Hi-tech sector predominantly rated startups as "Good" and "Average" ratings, which reflects their high visibility within the ecosystem. Corporations in Fintech / Insurtech and Legal and administrative were also positive "Good" or "Excellent". Conversely, the high number of "Cannot say" responses for sectors like Automotive and Banking suggests that corporations in these niche areas have not engaged that deeply with the startups yet.

Drivers of corporate-startup engagement

To build meaningful collaborations, it is vital to understand the underlying motivations driving corporations to engage with the startup ecosystem. Are they seeking to enhance existing products, enter new markets, or defend against disruption? The survey asked corporations to identify their primary strategic goals for engaging with startups. The results, shown below, in Figures 6.f. and 6.g. reveals similar distribution to other factors discussed thus far, that motivations vary significantly depending on a company's technological focus and industry sector.

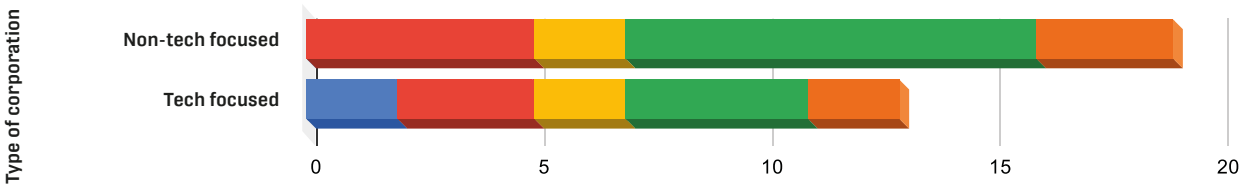


Figure 6.f. Primary strategic goals driving corporate engagement with startups, comparing Non-tech and Tech focused corporations (N=16, survey data)

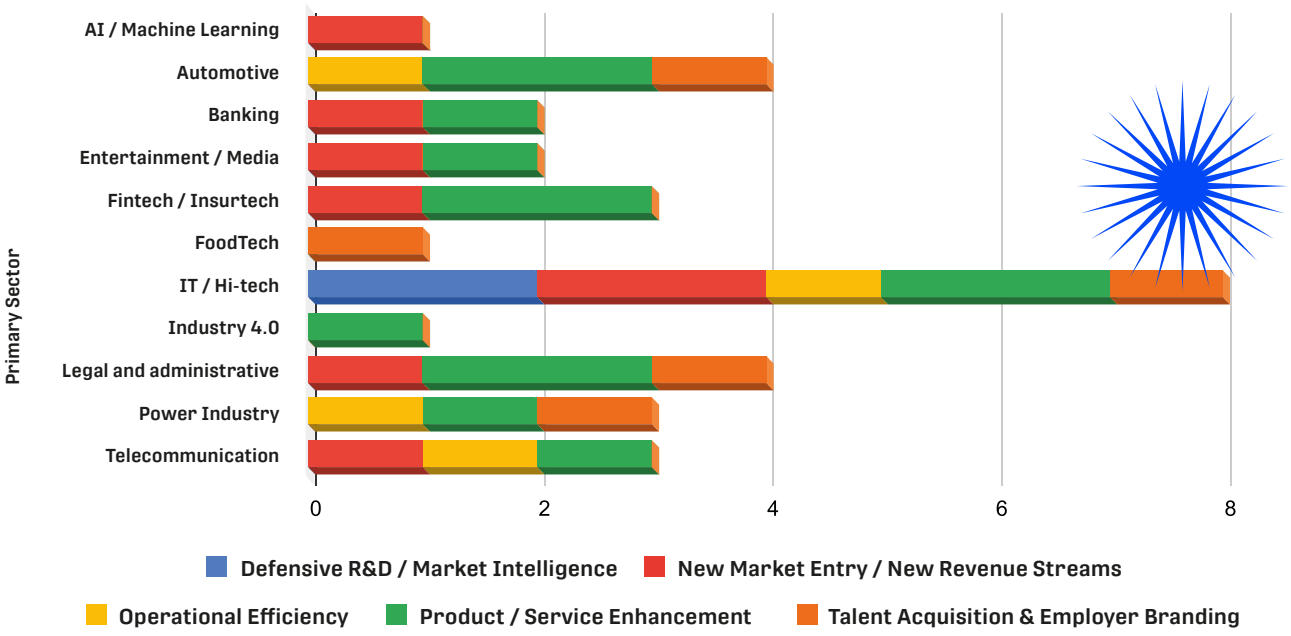


Figure 6.g. A breakdown of the primary strategic goals for corporate-startup engagement by the corporation's sector (N=16, survey data)

Non-tech focused corporations are predominantly driven by one main objective: "Product / Service Enhancement". This indicates they are primarily looking to startups to provide innovative solutions that can be integrated into their current offerings. In contrast, Tech-focused corporations have a more diverse set of strategic drivers, but product/service enhancement is still found to be important. They place nearly equal emphasis on "New Market Entry / New Revenue Streams" and "Defensive R&D / Market Intelligence". This trend is further reflected at the industry level. IT / Hi-tech sector shows the widest range of motivations, from R&D to operational efficiency, highlighting the multifaceted role of startups in their competitive strategy. Other sectors are more targeted; for instance, corporations in the Automotive sector are focused on "Operational Efficiency" in addition to product enhancement, while those in Fintech / Insurtech are primarily driven by the need to enhance their services. For startups in Lower Silesia, this means that aligning their pitch with a corporation's specific industry and strategic goals is critical for success.

Potential for future corporate-startup collaboration

Strategic drivers explain the current interest in startups, but the long-term health of the ecosystem depends on the perceived potential for future collaboration. Are corporations optimistic about finding and working with startups in Lower Silesia? The survey explored this sentiment, revealing a mixed but cautiously hopeful outlook that varies significantly by industry, see Figures 6.h. and 6.i. Both Non-tech and Tech-focused corporations express a wide range of views, from seeing "significant potential" to feeling "uncertain" or viewing it as a low strategic priority. However, the outlook becomes much clearer when viewing the sector-wises perception. Corporations in sectors like Legal and administrative and Entertainment / Media are notably optimistic, indicating a strong belief in the potential for partnerships. In contrast, those in sectors like Automotive and Power Industry are more reserved, with many seeing "limited potential," suggesting that startups in these fields may face a greater challenge in engaging corporate partners.

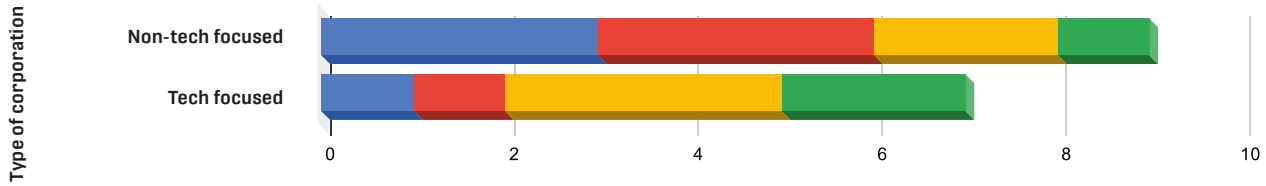


Figure 6.h. Perceived potential for collaboration with Lower Silesia-based startups, comparing Non-tech and Tech focused corporations (N=16, survey data)

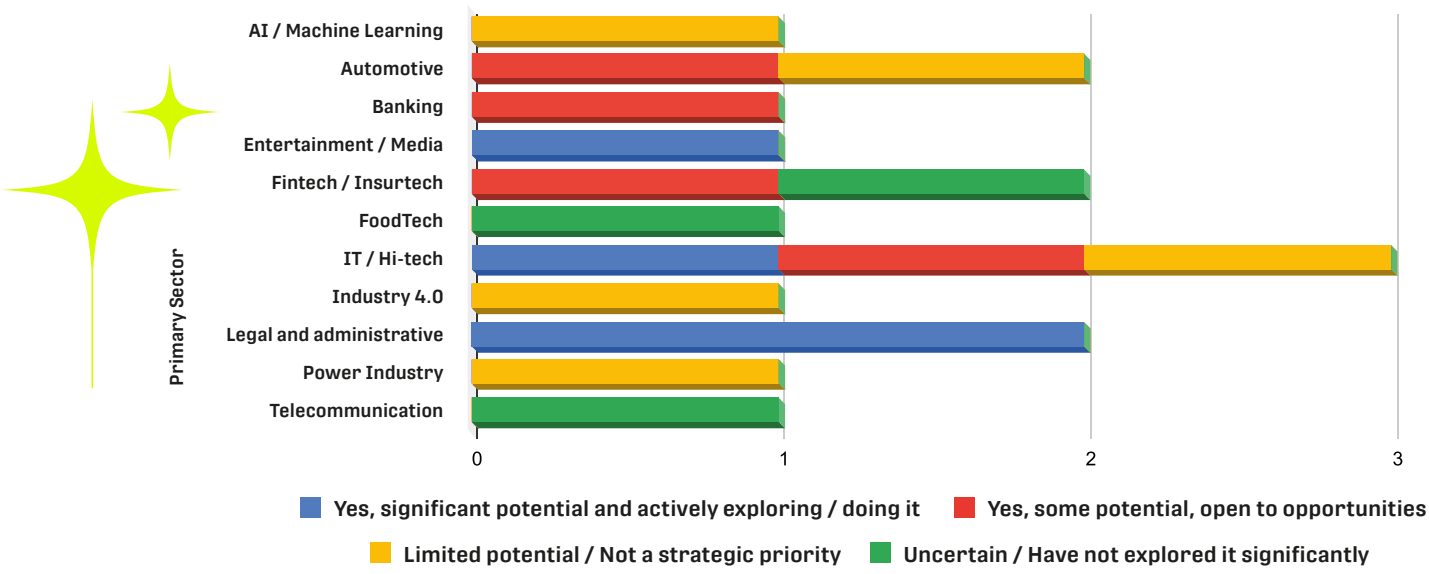


Figure 6.i. A breakdown of the perceived potential for collaboration with startups by the corporation's primary sector (N=16, survey data)

FUTURE ENGAGEMENT OUTLOOK

When asked about their plans for the next 12-24 months, the corporate response signals a positive trajectory. Majority of corporations expect their engagement level to remain the same (6 of 16) or are uncertain (5 of 16). 4 out of 16 corporations indicated looking to grow their involvement, and one planning a significant increase. Crucially, no respondents indicated an intention to decrease their engagement, pointing to a stable foundation with clear potential for growth in corporate-startup partnerships across the Lower Silesian ecosystem.

Preferred forms of corporate-startup collaboration

Understanding how corporations wish to collaborate is just as important as knowing why. To facilitate more effective partnerships, the survey asked organizations to identify the specific forms of collaboration they are most interested in pursuing. The responses show that the ideal structure for collaboration is not one-size-fits-all; it again depends heavily on the corporation's own focus and industry needs, see Figures 6.l. and 6.m.

Figure 6.l. Preferred forms of collaboration with startups, comparing the interests of Non-tech and Tech focused corporations (N=16, survey data)

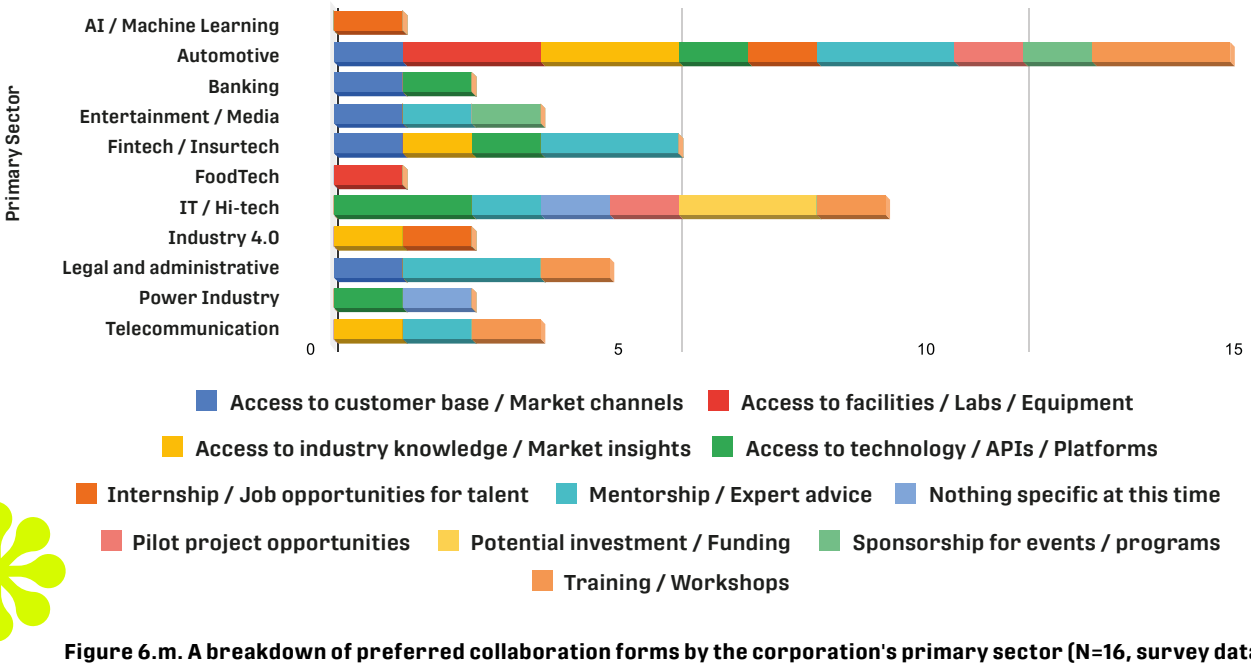
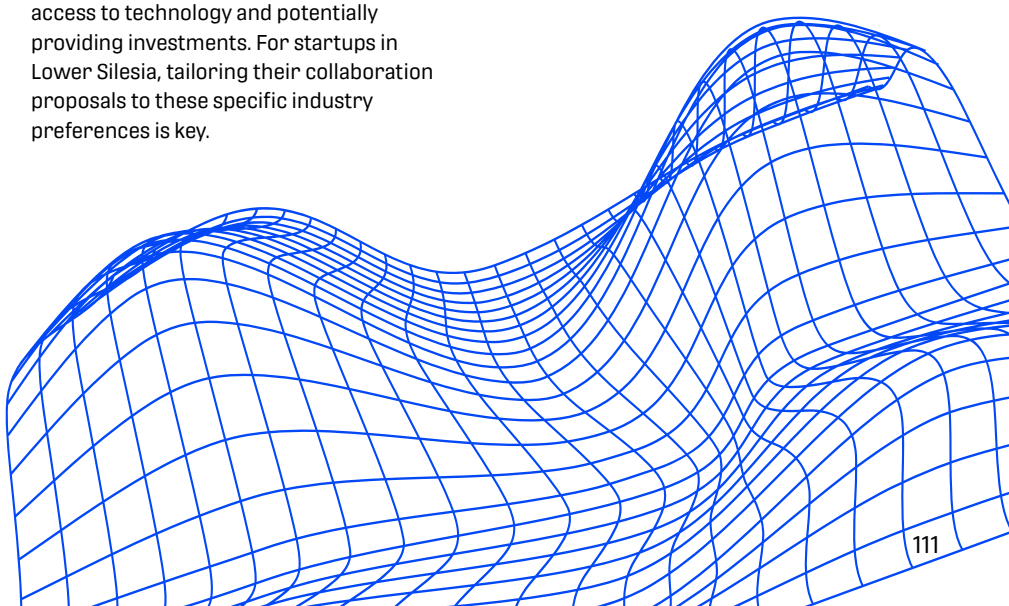


Figure 6.m. A breakdown of preferred collaboration forms by the corporation's primary sector (N=16, survey data)

Non-tech focused companies express high interest in "Mentorship / Expert advice," "Access to customer base/ Market channels," and offering "Access to technology." This suggests an openness to various engagement models, as compared to Tech focused corporations, who have more targeted interests in tangible exchanges like "Access to technology / APIs / Platforms" and "Access to industry knowledge / Market insights." The industry-specific data reveals that the Automotive sector stands out with the most diverse set of interests, showing a strong appetite for nearly every form of collaboration. Other sectors have more specific preferences; for example, firms in the Legal and administrative sector are most interested in offering mentorship and access to their market channels, while the IT / Hi-tech sector prioritizes access to technology and potentially providing investments. For startups in Lower Silesia, tailoring their collaboration proposals to these specific industry preferences is key.



Perceived barriers to corporate-startup collaboration

There is clear interest in collaboration, however it is vital to also understand if there are any perceived barriers that the corporations have. Hence, the survey asked corporations to pinpoint the biggest challenges they face when trying to work with startups. The responses highlight a mix of internal corporate hurdles and external issues related to the startups themselves, see Figure 6.n. and 6.o.

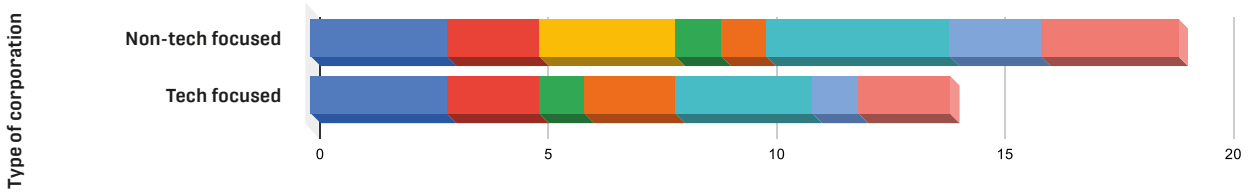


Figure 6.n. The most significant barriers corporations face when collaborating with startups, comparing Non-tech and Tech focused corporations (N=16, survey data)

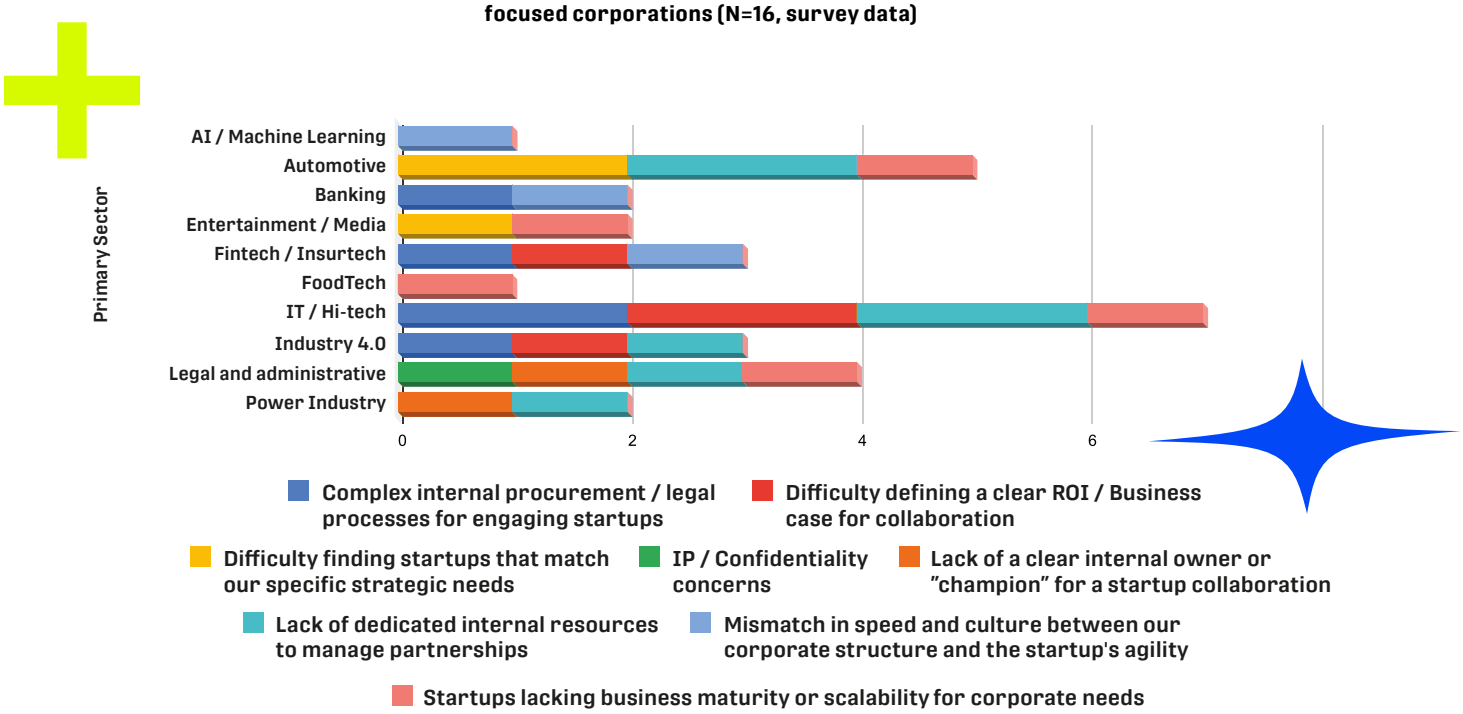
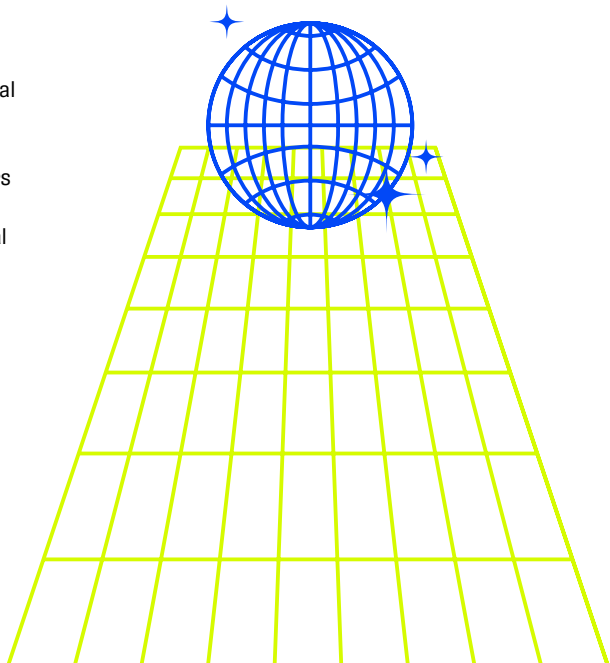


Figure 6.o. A breakdown of the biggest barriers to collaboration by the corporation's primary sector (N=16, survey data)

Both tech and non-tech corporations have primary internal obstacles due to complex processes and a "Lack of dedicated internal resources to manage partnerships." They also have the same perception about external factors, the only fundamental difference being that Non tech focused corporations have a difficulty in finding startups that match their strategic needs. These barriers manifest differently across industries. Corporations in the IT / Hi-tech sector, despite being highly engaged, face a wide spectrum of challenges, from complex internal processes to a lack of dedicated resources. The Automotive industry points specifically to the difficulty in finding startups that match their strategic needs and startups lacking maturity. Meanwhile, highly-regulated sectors like Banking and Fintech / Insurtech are particularly challenged by their own "Complex internal procurement/legal processes." These findings underscore that there is no single solution; addressing these barriers requires a tailored approach that considers both the corporations' internal realities and the maturity of the startup ecosystem.



Enablers for stronger corporate-startup partnerships

The final step, in this section with corporations, is to understand what would make it significantly easier for corporations to engage with the Lower Silesian startup ecosystem. The survey asked corporations to select the most impactful enablers. The responses provide a roadmap for ecosystem builders, highlighting a strong demand for services that reduce friction and facilitate better matchmaking, see Figures 6.p. and 6.q. The data points to a near-universal need for better navigation and connection tools. A key difference being Non-tech focused corporations call for more co-investment opportunities, whereas Tech focused ones do not. This indicates a clear desire for a more structured and efficient way to find the right startup partners. Furthermore, many corporations, particularly in the Automotive and Fintech sectors, expressed strong interest in "More events focused on specific industry challenges (reverse pitches)." FoodTech, IT/Hi-tech, Power industry and Entertainment/ Media corporations also highlighted the need for "Streamlined legal/procurement templates for startup collaborations," pointing to a need for simplifying the administrative side of partnerships.

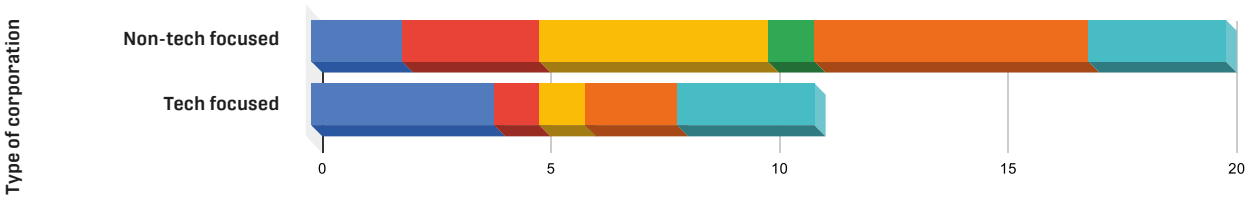


Figure 6.p. Enablers that would facilitate easier collaboration, comparing the needs of Non-tech and Tech focused corporations (N=16, survey data)

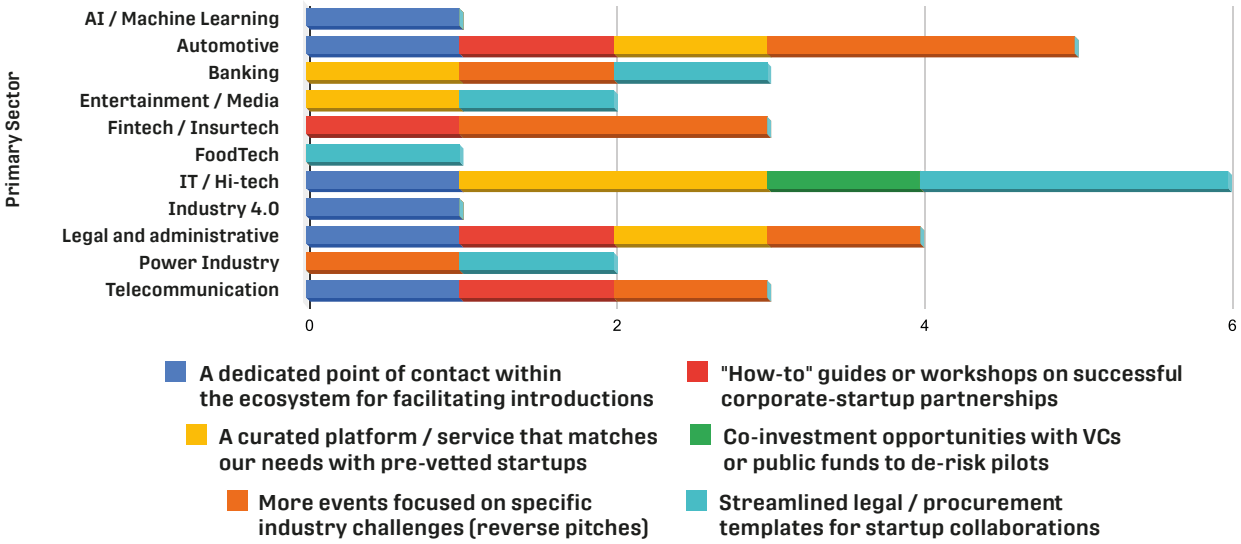
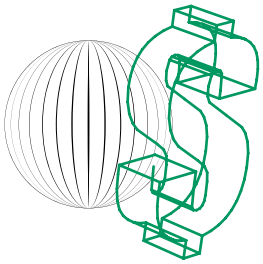


Figure 6.q. A breakdown of the most desired enablers for collaboration by the corporation's primary sector (N=16, survey data)

ATTRACTING CORPORATE R&D AND INNOVATION HUBS

Looking beyond individual partnerships, corporations also expressed an openness to establishing or expanding a major R&D or innovation hub in Lower Silesia under the right conditions. The feedback provides a clear message to regional stakeholders on what it would take to attract such investment. The most critical factor is financial support, with **10 out of 16 corporations citing the availability of "Significant government or EU incentives for innovation" as a key condition**. The second most important factor is the maturity of the ecosystem itself, with 6 out of 16 wanting to see a "greater density of mature, scale-up-ready startups to partner with." Other important, though less critical, conditions included "proven pipelines of senior tech and product talent" and "access to specialized university research partnerships," both mentioned by 3 out of 16 respondents.

BNP Paribas: Partnering with innovation at the heart of Lower Silesia



At Bank BNP Paribas, we believe that innovation happens where passion, technology and collaboration meet, and we found all of these factors in the startup ecosystem in Lower Silesia. That is why we have decided to become a partner of the Startup Wroclaw community.

That is why we decided to join as a partner of the Startup Wroclaw community. We are the bridge between the worlds of finance and innovation. Our innovation and startup cooperation team regularly attends key industry events in Wrocław because we believe that the future of finance and technology is built together.

We work with startups, scaleups and VC funds, offering not only banking services, but also a deep understanding of their business models, needs and growth challenges. We support founders at every stage, from MVP to international expansion. While we have not yet invested in a Wrocław-born startup, we do work with startups from this region as clients.

WROCŁAW – THE "LYON" OF THE POLISH STARTUP ECOSYSTEM?

From the perspective of BNP Paribas – with strong roots in both the French and Polish innovation landscapes – we see Wrocław as a city that echoes the spirit of Lyon:

> A regional powerhouse, Wrocław punches above its weight thanks to its vibrant tech scene, culture of collaboration and world-class talent.

Just as Lyon complements Paris on the French startup map, Wrocław adds depth and character to the Polish ecosystem beyond the Warsaw-centric narrative. As a bank that supports innovation in both countries, we believe in the kind of ecosystem that Wrocław represents: ambitious, connected and rooted in community.

BNP PARIBAS

WHAT WE SEE IN THE WROCŁAW STARTUP ECOSYSTEM – THROUGH THE LENS OF A BANK THAT WORKS WITH FOUNDERS & STARTUPS

At Bank BNP Paribas, we actively participate in local events, such as Made in Wroclaw and Evolutions: Meetup & Showcase, engaging with founders, innovators and ecosystem builders. Thanks to our involvement, we can see the unique qualities that set the Wrocław startup scene apart from any other region in Poland.

Wrocław offers a rare blend: tech hubs of major corporations such as Google, Nokia, Dolby and Volvo IT work alongside late- and early-stage startups. It is also worth mentioning the high number of exits and mature technology companies that share their knowledge and investments with the local community. This creates a living ecosystem where innovation flows both ways – from corporations and local late-stage startups to newly established teams, and back.

Unlike many ecosystems that focus solely on software, Wrocław stands out with its strong Industry 4.0, medtech, biotech, robotics and deep tech ventures, which are often rooted in academic R&D. It is a region where innovation starts in the lab but reaches real markets. Grassroots initiatives, meetups and foundation-led projects (such as Tech To The Rescue and "Evolutions") demonstrate that Wrocław is a community-first ecosystem.

WHAT PROBLEMS DO WE HELP STARTUPS SOLVE?

At BNP Paribas Bank Polska, we engage with founders and startups not only during events, but also at key stages of their growth. We see recurring challenges beyond capital when we work with companies in the early- and growth-stages. These challenges include liquidity gaps, financial structure and access to our network.

This is where we come in: we bank, we invest and we implement. Startups often have limited access to financing and are accustomed to relying on grants or VC money. Our team helps startups understand when and how to approach debt financing or direct investment, how to prepare for it, and whether it is appropriate for their stage of development.

As an Open Innovation Bureau, our mission is to educate our internal banking teams to view startups not as risky anomalies, but as tomorrow's customers. To support this understanding, we run several internal initiatives, including monthly webinars (**#StartupCoffee**) and a community (**#StartupLovers**). Through these, we promote an understanding of how the ecosystem works and share trends and news.

Startups are often considered "too early stage" for traditional banking. With us, however, they are directed to a dedicated team that understands their needs and dynamics. We connect startups with our corporate clients, VC funds and strategic partners to accelerate collaboration and visibility, making use of the extensive reach of BNP Paribas Group events and networks.

BANK BNP PARIBAS WITH INNOVATION IN NUMBERS:

200
of innovative companies as customers.

30
implementations of innovative solutions inside the Bank.

30 mln euro
of debt financing for innovative companies in our new product Kredyt InvestEU.

See more:

How do corporations support and contribute to the Lower Silesian startup ecosystem, and how can they benefit from it?

Wrocław, due to the synergy of its academic potential and business dynamism, is increasingly establishing itself on the European map as a formidable medtech hub.

The collaboration between startups, academia, and established corporations is crucial. As one of the largest R&D centers in Poland – and Nokia's second biggest worldwide – we see ourselves not only as a contributor to global innovation but also as a partner in shaping the local ecosystem here in Wrocław and the broader region.

Corporations play a unique role in such ecosystems. Startups bring agility, fresh perspectives, and disruptive energy. Corporations, on the other hand, provide scale, stability, access to markets, and the infrastructure necessary to test and commercialize innovation. When these two worlds interact meaningfully, the ecosystem flourishes.

> **The ecosystem in Lower Silesia is maturing quickly. With strong academic foundations, an entrepreneurial spirit, and increasing corporate engagement, the region has all the elements needed to become a leading hub of technology and innovation in Europe.**
>
> *Taras Lukaniuk,*
> *Country Manager Nokia Poland*

At Nokia, we have embraced this philosophy in our local engagement. We work closely with universities and research institutions, where our collaborations bridge the gap between academic research and industrial application. This strengthens the talent pipeline while giving young innovators exposure to real-world challenges. Through initiatives such as Klub Innowatora run by Wrocławski Park Technologiczny, we open our doors to show how a global R&D center operates in practice. By doing so, we aim to inspire curiosity, encourage experimentation, and demonstrate that world-class innovation can be nurtured in Wrocław. We also engage actively in meetups and knowledge-sharing platforms, where our engineers, researchers, and managers exchange insights with

startups, contributing to the community's collective learning and growth.

Looking forward, the potential for corporate-startup cooperation in Lower Silesia is vast. Corporations can become early adopters and validation partners for startup solutions, offer mentorship and technical expertise, and co-create new technologies in areas like 5G, AI, and cybersecurity. In return, corporations benefit from the speed, creativity, and entrepreneurial drive that startups bring into the innovation cycle.

The ecosystem in Lower Silesia is maturing quickly. With strong academic foundations, an entrepreneurial spirit, and increasing corporate engagement, the region has all the elements needed to become a leading hub of technology and innovation in Europe. Nokia is proud to be part of this journey and remains committed to fostering partnerships that accelerate growth, create opportunities, and inspire the next generation of innovators.

Taras Lukaniuk
Country Manager Nokia Poland

Where Creativity Meets Technology: The Power of Local Initiatives

From our headquarters in the heart of Wrocław, we have the privilege of witnessing an ecosystem that is vibrant, ambitious, and full of creative energy. Lower Silesia's startup community, supported by universities, incubators, and public initiatives, is building an environment where ideas can thrive and transform into real impact.

What stands out most is the diversity of innovation happening here—from gaming studios and creative agencies to engineering firms and AI-driven ventures. These initiatives not only showcase technical excellence but also reflect a culture of bold thinking and collaboration. This spirit is what makes Wrocław such an exciting place for technology and entrepreneurship. At MSI, we are passionate about the trends shaping the future: immersive gaming, the creator economy, and high-performance computing. Seeing how local innovators explore these frontiers is inspiring and aligns with our belief that technology is a catalyst for creativity and progress. We deeply appreciate the efforts of those who are building this ecosystem—mentors, educators, founders, and community leaders. Their work lays the foundation for breakthroughs that can resonate far beyond the region. As we continue to observe and learn from this dynamic environment, we look forward to discovering new ways to connect, share knowledge, and support the ambitions of this remarkable community.

Aleksandra Akonom
NEE General Manager
MSI Poland

> From our headquarters in the heart of Wrocław, we have the privilege of witnessing an ecosystem that is vibrant, ambitious, and full of creative energy.
>
> *Aleksandra Akonom,*
> *NEE General Manager*
> *MSI Poland*

Ecosystem Partners for Growth

Your guide to the top incubators, accelerators, technology parks, computing centres and venture builders.

Lower Silesia has a number of organizations dedicated to transforming innovative ideas into successful businesses. Whether you need expert mentorship, access to funding, or strategic partnerships, the right partner to fuel your growth can be found here. Some of the prominent partners are showcased below.

ABSL

Business & IT Services Association

ABSL connects startups with large member companies and facilitates strategic networking through exclusive industry events to foster business development and partnerships.

Members gain access to exclusive industry reports, market data, and trend analyses to support informed strategic decision-making.

The association advocates for the sector's interests with government bodies and leads talent development initiatives to ensure a sustainable business environment.

Read more:
www.absl.pl

BRIDGE Foundation

Foundation

The foundation focuses on developing sustainable, implementation-oriented high-tech projects that can mature into globally competitive companies.

It fosters innovation ecosystems by connecting science, industry, investors, and administration to help scale new technologies effectively.

Through its signature East x West Forum, the foundation provides an elite platform for leaders to create partnerships that lead to real-world technology implementations.

Read more:
www.bridgefoundation.pl

Concordia Design Accelerator

Accelerator

The accelerator provides startups with equity-free grants of up to 400,000 PLN and access to a network of over 60 partners, including global companies and Polish champions.

It helps young Polish companies conquer the market by specifically finding a "Technology Recipient" for their product and acquiring an investor for financial support.

It supports international innovators by assisting with company registration in Poland, acquiring their first local clients, and finding capital for further development in the CEE region.

Read more:
www.accelerator.concordiadesign.pl

Rebelpolis

Venture and ecosystem builder

Rebelpolis helps startups with strategy, product development, and fundraising, leveraging 15 years of experience from co-creating 20 SaaS projects with over one million users.

It trains future leaders through dedicated programs, placing its 100+ graduates in top tech companies like Spotify and Truecaller or helping them launch their own startups.

Rebelpolis connects founders to global markets and investors through its Hanza MeetUp Club and international business missions.

Read more:
www.rebelpolis.com

ITCORNER

Technology Founders Community

ITCORNER hosts local Managers' Breakfasts, offering an open-format meetup for startup founders to learn directly from experienced entrepreneurs and discuss business challenges.

Through its ITCORNER Abroad program, it supports international growth by providing startups with practical insights and connections for entering markets like the DACH region, UK, USA, and the Nordics.

The organization's flagship UPGRADE Conference annually brings together tech leaders and investors to discuss high-level topics such as courage in leadership and business transformation.

Read more:
www.itcorner.org.pl

StartSmart CEE

Innovation Catalyst & Accelerator

It runs an MIT methodology-based acceleration program with two distinct paths: the Rethink track for refining early-stage business models and the Pilot Ready track for testing solutions with strategic partners.

In partnership with the Massachusetts Institute of Technology, the organization hosts flagship events like the MIT Global Startup Workshop – Shaping Tomorrow to connect local innovators with global thought leaders and investors.

The GoGlobal initiative provides startups with targeted market-entry support and investor introductions to scale into the strategic ecosystems of Boston and Berlin.

Read more:
www.startsmartcee.org

Startup Founders

Founder Association

Through its Founders4Founders program, it facilitates "Expert Circles" where members receive practical, peer-to-peer advice on specific challenges in marketing, funding, and team management.

The association hosts the annual Founders Night during Web Summit in Lisbon, providing a dedicated platform for innovators to connect with international investors and partners.

It builds a trusted internal community through regular meetings featuring unique formats like the candid "Roast" feedback sessions and targeted "Learn the New" up-skilling workshops.

Read more:
www.startupfounders.pl

SWPS University

Impactful Accelerator

It runs the Startup Booster for Social Impact, an acceleration program, implemented with PARP funds, offering financial support and tailored mentorship to ventures focused on positive societal and environmental change in cooperation with the broad startup ecosystem of VCs, industry partners, administration, as well as the City of Wroclaw.

The university organizes the Change It! Impactful Innovation Challenge, an interdisciplinary competition where student teams develop and validate solutions for pressing global issues.

It co-organizes Wrocław Tech Date, a recurring event connecting academia with industry and investors to foster deep interdisciplinary collaboration on emerging trends like MedTech, ICT, robotics and space technologies.

Read more:
www.swps.pl

Centre for Innovation and Business (CIB WUST)

Innovation and technology transfer

The centre coordinates interdisciplinary Research Centres focused on strategic areas like renewable energy, artificial intelligence, and medical technologies to develop modern solutions.

It provides direct support to scientists and innovators in protecting their intellectual property, managing patent procedures, and offering specialized legal advice.

It acts as a primary gateway for entrepreneurs by providing access to the university's modern laboratories, expert knowledge, and research centres to foster business-science cooperation.

Read more:
www.biznes.pwr.edu.pl

Akademicki Inkubator Przedsiębiorczości
Politechnika Wrocławska

PWr Academic Entrepreneurship Incubator (AIP WUST)

Academic Incubator

The incubator runs Grow Up Tech, a pre-incubation program where student founders validate science-based ideas, design MVPs, and pitch their concepts to real investors.

It offers AIDEAS, Poland's largest applied AI skills program, which in its first year saw over 800 teams design 300,000 AI agents to solve real-world business challenges.

Through its Startup Support Network, it provides hands-on legal, financial, and accounting guidance, along with expert sessions and networking events like Innovation Date.

Read more:
www.inkubator.pwr.edu.pl

ITT
Instytut Transferu Technologii

PWr Technology Transfer Institute (ITT)

Technology Transfer Company (Special Purpose Vehicle)

The institute's main objective is commercializing university research by establishing and taking shares in spin-off companies or by licensing technology rights to external industrial partners.

It directly serves industry needs by carrying out commissioned research and development projects and providing companies with access to the university's advanced laboratories and research teams.

The institute builds business-science relationships by organizing industry conferences, preparing specialized expert reports, and actively promoting the inventions and ideas of university scientists.

Read more:
www.itt.wroc.pl

inQUBE

inQUBE

University Business Incubator

The incubator offers the inQUBE Academy, an intensive and free program designed to equip startup founders with essential business skills and practical knowledge.

Startups receive Personalized Advisory through one-on-one consultations with a network of over 50 experienced industry practitioners and leading technology experts.

It provides founders with modern office spaces on the university campus and hosts regular Meetups to connect them with a broader community of innovators and entrepreneurs.

Read more:
www.inqube.pl

Centrum
Transferu Technologii
Uniwersytetu Medycznego
we Wrocławiu

Wroclaw Medical University Technology Transfer Centre (TTC UMW)

University Technology Transfer Centre (Medtech/ Biotech)

The centre provides startups with a portfolio of ready-to-license scientific solutions, including advanced diagnostic tools, innovative cell lines, and digital applications.

It offers founders access to state-of-the-art research labs and specialist clinical facilities, enabling them to validate prototypes and generate investor-grade data with expert scientific support.

Each startup receives a dedicated coordinator who facilitates connections to a network of expert mentors, clinicians, and industry partners to support pilot projects and investor relations.

Get in touch:
www.ctt.umw.edu.pl

Uniwersytet Przyrodniczy we Wrocławiu

UPWr's Office for Cooperation with Industry

University-Business Cooperation Office

It helps founders build market-ready companies by fueling joint ventures, protecting IP, and driving implementation.

We guide future entrepreneurs through the journey – from a scientific idea to a business – within the EU Green Entrepreneur Journey Program.

It equips entrepreneurs with the IP knowledge and innovation tools needed to launch their business within the EUGreen ecosystem.

Read more:

www.dwg.upwr.edu.pl

WPT Wrocławski Park Technologiczny

Wroclaw Technology Park (WPT)

Technology Park & Accredited Innovation Center

Through its Business Incubators, the park has supported over 350 companies with an 80% market success rate by offering comprehensive services like offices, labs, and mentoring on preferential terms.

The WPT STARTUP HUB program provides a crucial first impulse by offering startups support of up to 90% for office space and 50% for laboratories during their first five years of operation.

Its Development and Scaling Platform helps companies move from prototype to growth phase by providing access to production lines and business consulting, backed by over PLN 31.5 million in financial aid.

Read more:

www.technologpark.pl

Other regional ecosystem partners

ORGANIZATION	TYPE OF ORGANIZATION	WEBSITE
Skrzynia Integration Business Incubator	**Incubator**	www.technologpark.pl/integracyjny-inkubator-przedsiebiorczosci/#ofertainkubatora
Kamienna Góra Municipality Business Incubator	**Incubator**	www.inkg.pl
Lower Silesian Art Entrepreneurship Incubator	**Incubator**	www.artinkubator.bielawa.pl
Bielawa Business Incubator	**Incubator**	www.barlbielawa.pl
Legnica Business Incubator	**Incubator**	www.arleg.eu
Stacja Rozwój Business Incubator	**Incubator**	www.inkubator-ladek.pl
Sudecki Business Incubator	**Incubator**	www.inkubatorsudecki.pl
Wałbrzych Business Incubator	**Incubator**	www.inkubator.walbrzych.pl/inkubator
Center for Entrepreneurship Support Incubator (Wrocław)	**Incubator**	www. cwp.wroclaw.pl/inkubator-przedsiebiorczosci
SPA Business Incubator	**Incubator**	www. zdrojowyinkubator.pl
Środa Śląska Business Incubator	**Incubator**	www.sipsrodaslaska.pl
Twój StartUp Foundation	**Foundation**	www.twojstartup.pl
Lower Silesian Business Incubator (Świdnica)	**Incubator**	www.dolnoslaskiinkubator.pl/kontakt
Kłodzko Business Incubator	**Incubator**	www.inkubator.klodzko.pl
Ziębice Business Incubator	**Incubator**	www.inkubator.ziebice.pl
Strzelin Municipal Business Incubator	**Incubator**	www. strzelin.pl/asp/pl_start.asp?typ=14&menu=247&strona=1&sub=43
Ząbkowice Śląskie Business Incubator	**Incubator**	www.inkubator.zabkowiceslaskie.pl
E-sports Business Incubator	**Incubator**	www.inkubatoresportu.pl/

An analytical overview of support network

Following the introduction of the ecosystem's key support organizations, this section discusses the operational dynamics revealed by the Startup Wroclaw survey. A total of 14 key organizations including incubators, accelerators and technology parks participated, with 13 completing the survey questions used in the analysis of this section and 1 providing partial responses. The data offers a window into where these organizations focus their efforts, the scale of their operations, and their deep connection to the local ecosystem. We begin by examining the primary stage of development at which these organizations engage with startups. Figure 7.a illustrates the ideal stage for a startup to enter an organization's primary program. The results show a near-even split, with **53.8% of organizations supporting startups at all stages** of development and **46.2% focusing specifically on the "Idea / Pre-MVP" stage.**

Crucially, this means that 100% of the surveyed support organizations cater to idea-stage founders, either exclusively or as part of a broader mandate. This finding reinforces the conclusion from earlier in this report that the Lower Silesian startup ecosystem possesses a robust and comprehensive support structure for entrepreneurs in the earliest phases of their journey.

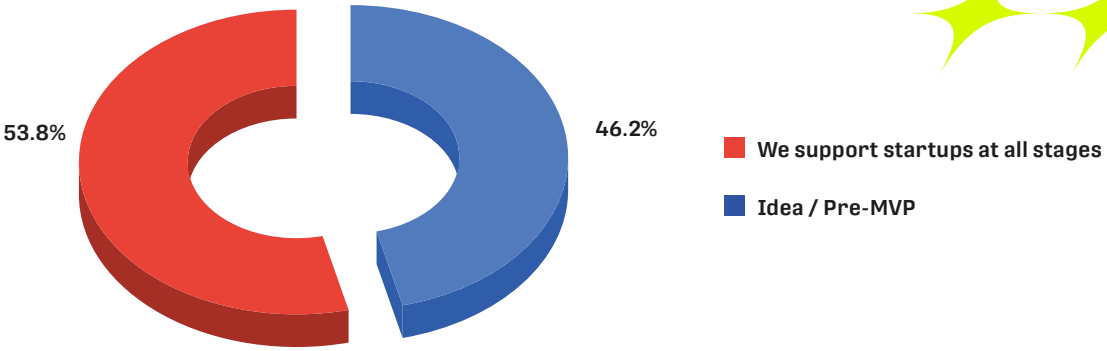


Figure 7.a. Primary stage of startup engagement for support organizations in Lower Silesia

To understand the scale of these organizations and their connection to the region, the following table provides a breakdown of their portfolio sizes. The table cross-references the total number of startups supported by each organization (rows) with the number of startups from within Lower Silesia (columns). The data shows a strong local focus within the support network. A clear trend emerges where the total number of startups an organization supports often directly corresponds to the number of startups from Lower Silesia in its portfolio. This indicates that the majority of these support programs are not just based in the region, but are deeply invested in nurturing local talent and ventures.

Table 7.a. Portfolio size of support organizations: Total startups vs. startups from Lower Silesia (N=13, survey data)

Number of startups supported	Number of startups supported from Lower Silesia				
	None	1-10	11-25	26-50	51+
1-10	0	4	0	0	0
11-25	0	0	2	1	0
26-50	0	0	1	3	0
51+	0	0	0	0	1
None	1	0	0	0	0

Support network's focus and funding

To understand the strategic priorities of the ecosystem's support organizations, we analyzed their primary roles the support network undertakes in connecting stakeholders and their underlying funding models. Rather than operating in silos, these incubators, accelerators, and technology parks often serve multiple functions, acting as crucial nodes that link startups with vital resources. Figure 7.b visualizes the combinations of roles these organizations identify with. The data reveals that the most common role includes connecting all stakeholders within the ecosystem, suggesting a significant segment of the support network dedicated to actively weaving the ecosystem together.

HOW TO READ FIGURE 7.B.:

The top bars show the number of **organizations** that selected a specific combination of roles. The connected black dots below each bar indicate exactly **which roles** are included in that particular combination.
The categories in the Figure 7.b. are defined as: **Startup to investors:** The organization focuses on connecting its startups to investors; **Startup to corporates:** The organization focuses on connecting its startups to corporate partners; **Startups to talent/mentors:** The organization focuses on connecting its startups to talent and mentors; **Startups to each other:** The organization focuses on fostering a peer network by connecting its startups to each other; **All stakeholders in ecosystem:** The organization actively works to connect all parts of the ecosystem (investors, corporates, talent, etc.); **Internal Focus:** The organization is primarily focused on internal program delivery with less emphasis on external connections.

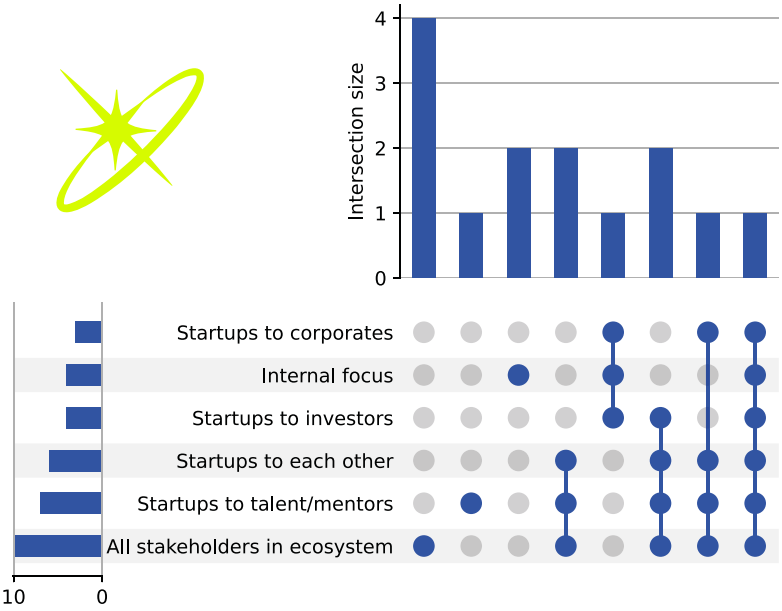


Figure 7.b. Combinations of primary roles played by support organizations in connecting the ecosystem (N=14, survey data)

To complement the understanding of their strategic focus, Table 7.b. discusses the financial underpinning which often influences an organization's priorities and success metrics. Incubators in the ecosystem are predominantly sustained by public grants and government support. In contrast, accelerators operate on a venture model, relying on returns from investments in their portfolio companies. Technology Parks and other organizations show more varied models, using corporate sponsorships or a mix of sources. The "Others" category includes notable exceptions that enrich the ecosystem: one incubator is funded by a university, and another organization operates as a consultancy, funding its work through revenue from design and consulting services.

Table 7.b. Primary sources of funding by organization type (N=14, survey data)

Organization	Source of funding						Total
	Corporate sponsorships	Management/ participation fees from startups	Public grants / Government support	Returns on investment in portfolio companies	A mix of the above	Others	
Accelerator	0	0	0	2	0	0	2
Incubator	0	0	6	0	0	1	7
Technology Park	1	0	0	0	1	0	2
Others	0	1	0	0	1	1	3
Total	1	1	6	2	2	2	14

Support network's core program focus

To identify where the ecosystem's resources are concentrated, we analyzed the core industries and technologies that support organizations focus on. This maps the specific areas of expertise available to founders and also reflects the technological strengths of the Lower Silesian region. The data in Figure 7.c. shows a blend of specialized and generalized support. A significant number of organizations classify themselves as "Industry agnostic," indicating that foundational support is available to startups regardless of their sector. Beyond this broad support, several high-growth technology sectors emerge as clear priorities. The most prominent specializations include Artificial Intelligence (AI) / Machine Learning (ML), IT / Hi-tech, Industry 4.0, Medtech / Healthtech, SaaS, and DeepTech. This strong focus on complex, research-intensive fields highlights the ecosystem's capacity to nurture technologically advanced ventures.

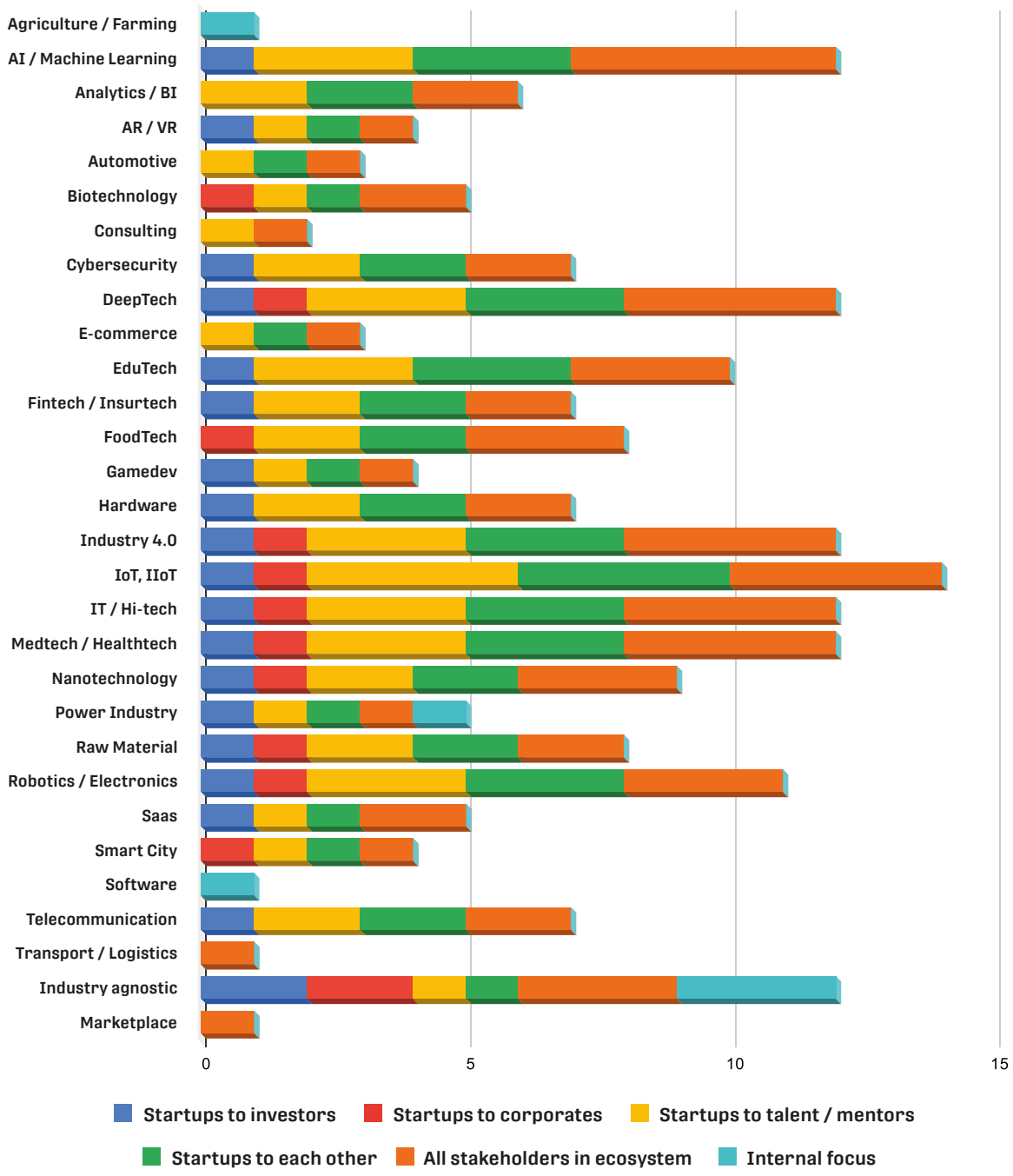


Figure 7.c. Industry focus of support programs, segmented by the organization's primary ecosystem role (N=14, survey data)

Support network's key success metrics

Understanding how support organizations measure their own performance provides deep insight into their core values and strategic goals. We asked organizations to select the key metrics they use to evaluate their success, revealing what outcomes they prioritize for their programs and for the ecosystem as a whole. The analysis in Figure 7.d. shows that organizations rarely rely on a single metric, instead using a combination of indicators to track their impact. The most foundational metric is the Number of startups graduated from our program(s), which is a component of nearly every popular combination. Interestingly, the data reveals two distinct philosophies for measuring success, each represented by a combination used by two organizations: **Venture-Oriented Success:** One group measures success through a classic venture capital lens, tracking Revenue Growth, Funding Raised, and the Number of Graduated Startups. **Ecosystem & Sustainability Focus:** Another group prioritizes long-term impact and resilience, focusing on the Startup Survival Rate, the achievement of Social/Environmental Goals, and the Number of Graduated Startups. This split indicates a healthy diversity in the ecosystem, with some programs geared towards producing high-growth, investment-ready companies and others focused on building sustainable businesses that contribute to broader regional goals.

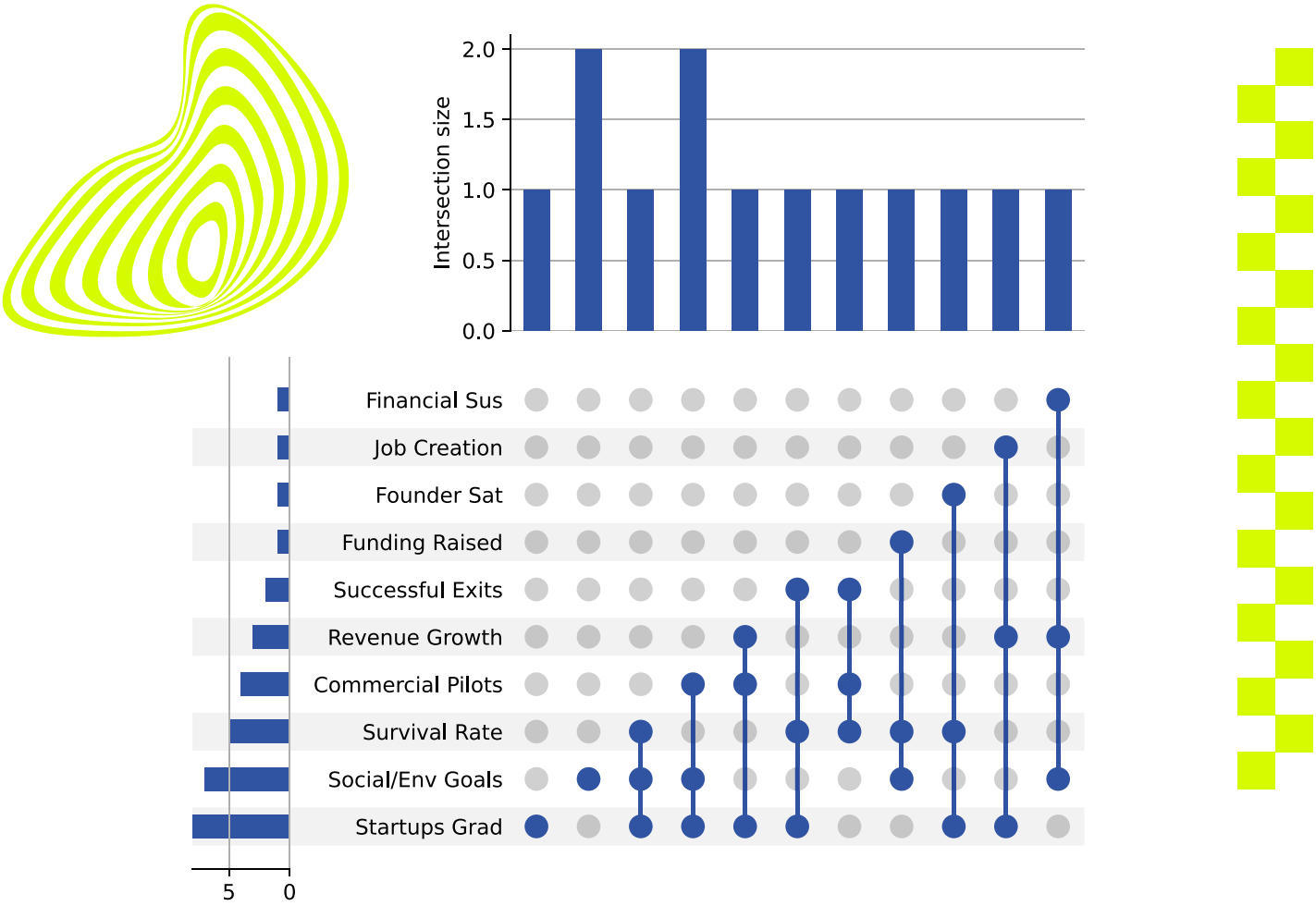


Figure 7.d. Combinations of key success metrics used by support organizations to measure performance (N=13, survey data)

HOW TO READ FIGURE 7.D.:

The vertical bars at the top show the number of organizations that use a specific combination of success metrics. The connected dots below each bar identify which specific metrics are included in that combination. The categories in the Figure 7.d. are defined as: **Startups Grad:** Number of startups graduated from our program(s); **Funding Raised:** Amount of follow-on funding raised by our alumni; **Revenue Growth:** Revenue growth of our portfolio/alumni startups; **Survival Rate:** Startup survival rate (% of alumni still operational after 3 years); **Successful Exits:** Successful exits (M&A or IPO) of our alumni; **Founder Sat:** Founder satisfaction with the program (e.g., Net Promoter Score); **Job Creation:** Job creation by our portfolio/alumni startups; **Commercial Pilots:** Successful commercial pilots or agreements with corporate partners; **Social/Env Goals:** Achievement of specific social, environmental, or regional economic goals; **Financial Sus:** Financial sustainability/profitability of our own organization.

Challenges and future support

SKILL GAPS AND PROGRAM CHALLENGES

To identify areas for improvement, the survey asked support organizations about the most common knowledge gaps they see among founders. The data, in Table 7.c., shows that the most critical challenges are not in technical expertise, but in commercialization. Go-to-market strategy and sales execution and Financial literacy and investment readiness were overwhelmingly cited as the top two skill gaps. This finding is again consistent with previous findings in the report regarding startups' facing weakness in these areas. This suggests a significant opportunity for the ecosystem to bolster support in these specific business development areas.

Table 7.c.: Most common founder skill gaps identified by support organizations. (N=13, survey data)

Knowledge-Skills Gap	Support network organization's focus					
	Startups to investors	Startups to corporates	Startups to talent/ mentors	Startups to each other	All stake-holders in ecosystem	Internal focus
Go-to-market strategy and sales execution	3	3	5	5	8	3
Financial literacy and investment readiness	3	3	6	5	8	3
International scaling strategy	2	2	4	3	7	1
Deep technical expertise in a specific field	0	0	1	0	1	0
Leadership and team management	0	0	0	0	0	2
Product management and development	1	1	2	2	3	2

Simultaneously, the support organizations face their own operational hurdles. As seen in the Table 7.d., the most significant challenge is Connecting startups with later-stage investors, followed by Securing operational funding for Support network's own programs.

Table 7.d.: Key operational challenges faced by support organizations (N=13, survey data)

Challenges faced	Support network organization's focus					
	Startups to investors	Startups to corporates	Startups to talent/ mentors	Startups to each other	All stake-holders in ecosystem	Internal focus
Sourcing a sufficient number of high-quality applicants	1	1	2	2	3	3
Securing operational funding/ sponsorship for our programs	2	2	5	4	6	2
Finding experienced mentors for specific industries/ technologies	2	1	3	2	3	1
Connecting our startups with later-stage investors	3	3	6	5	8	3
Helping our startups find and retain key talent	1	2	2	2	3	2
We do not operate in Lower Silesia	0	0	0	0	1	0

Ongoing and ecosystem-level support

The support network's commitment to startups often extends beyond formal programs. The most common forms of ongoing support are continued access to the mentor network and introductions to investors, with seven organizations offering each of these. This long-term engagement highlights the network's dedication, though it is worth noting that four organizations provide no formal post-program support. To enhance these efforts further, Support network provided direct feedback on how the ecosystem can help them. As Figure 7.e. illustrates, the most requested form of assistance is Promoting our programs to a wider audience of potential applicants. Other key needs include Co-organizing demo days or investor-matching events and Facilitating connections with corporate partners.

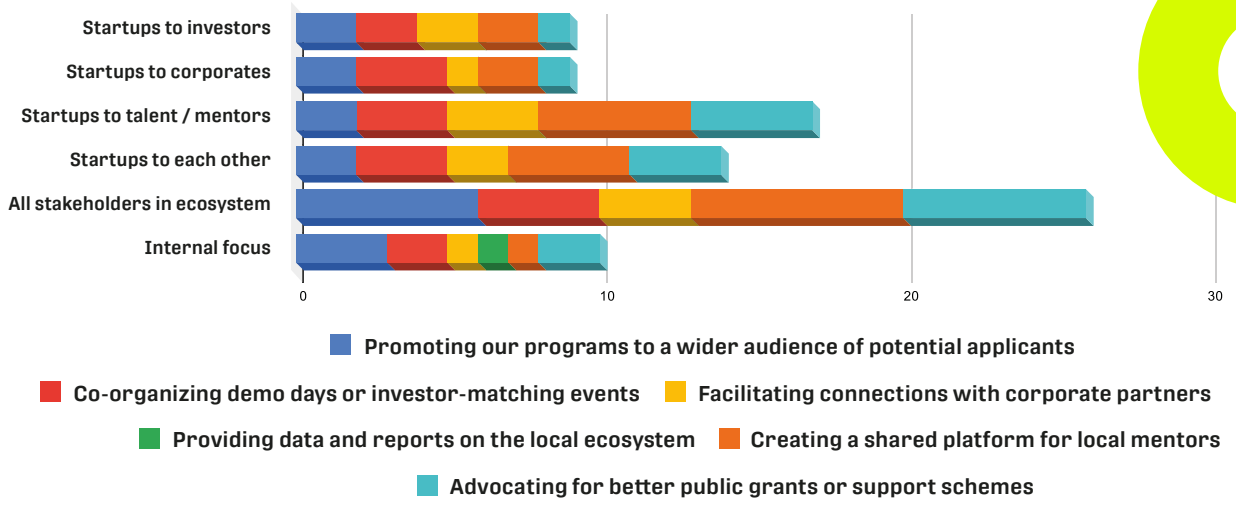


Figure 7.e.: Support network's desired support from ecosystem hub (N=13)

Highlighted startups from Lower Silesia's support network

The ultimate measure of the network's impact is the quality of ventures it helps create. To showcase the impact of the support network, respondents were asked to name standout startups from their programs. The list highlights the dynamism of the Wrocław tech hub, with a strong focus on deep tech and specialized SaaS platforms. Below are some of the companies named

- **HEROS Motorcycles**, a notable startup in the motorcycle industry.
- **QNA Technology**, frequently mentioned leader in advanced materials science.
- **SCANWAY**, a startup innovating in specialized imaging and scanning technologies.
- **SemiQa**, a startup operating in the semiconductor field.
- **OpenBrand**, a platform for small and medium food producers to generate, verify, and monitor legally compliant product labels efficiently.
- **pJazdy**, a modern app and web system transforming driver education in Poland by offering a free booking and management platform for driving schools.
- **SmartLunch**, a popular platform simplifying corporate lunch ordering and management.
- **bards.ai**, a venture leveraging the power of Artificial Intelligence.
- **Zeccer**, a platform providing a network for convenient, self-service printing.
- **Beyond Functional Food**, a startup specializing in natural tallow-based skincare products inspired by ancestral traditions.

SDZLEGAL SCHINDHELM
law. tax. clarity.

SDZLEGAL SCHINDHELM – your partner in the legal development of innovation

WHO ARE WE?

SDZLEGAL Schindhelm is one of the leading law firms in Poland, supporting clients in key business centers – Wrocław, Warsaw, and Gliwice – for over 20 years.

We are part of Schindhelm's international network, covering 14 countries and over 30 locations in Europe and Asia, as well as a member of the global IAG network, present in 74 countries on all continents. This allows us to combine in-depth knowledge of the Polish market with an international perspective and access to experts in almost every jurisdiction in the world.

Since the beginning, we have been supporting entrepreneurs in their bold ventures – from their first steps on the market, through investment rounds and international expansion, to complex transaction and restructuring processes. We understand that innovation knows no boundaries – and we operate in the same way.

COMPREHENSIVE AND INTERDISCIPLINARY

The development of technologies and business models based on innovation requires flexible, fast, and multifaceted legal support. At SDZLEGAL Schindhelm, we have established specialized teams that cooperate closely together to provide solutions covering, inter alia:

1. Corporate / M&A – mergers, acquisitions, company restructuring;
2. IP / IT, personal data protection, technology contract law;
3. Compliance, antitrust law, commercial contracts;
4. Labor law, including the posting of foreign workers;
5. Public procurement, bankruptcy law, construction law, real estate, taxes, banking and finance, environment, and waste management;
6. China/Southeast Asia – supporting innovative projects with international ambitions.

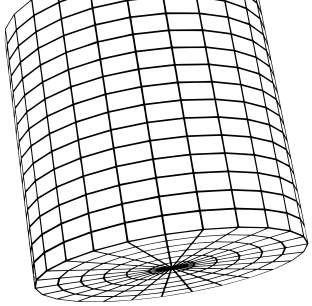
Close cooperation between these departments ensures that clients receive comprehensive, coordinated, and effective service, perfectly tailored to the changing realities of innovative business.

Why are we the first choice for startups and investors?

- **Holistic support:** from intellectual property protection, through investment agreements and M&A transactions, to international compliance.
- **Global experience:** access to a range of markets and regulatory conditions within the Schindhelm and IAG networks.
- **Agility and an out-of-the-box mindset:** we understand the specifics of technology projects, their speed, complexity, and scaling needs.
- **Reach and stability:** our presence in key cities and rich history confirm our status as a partner who understands the scale of the business.

We are not just lawyers – we are business partners who look at projects through the prism of their potential, not just their risks. We actively cooperate with the startup ecosystem, participating in industry events, acceleration programs, and initiatives supporting innovation.
We support founders not only in legal matters, but also in building development strategies and establishing contacts with investors and technology partners.

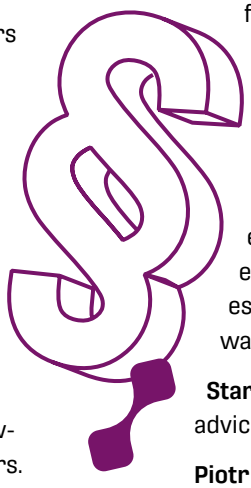
Thanks to our close relationships with industry organizations and VC funds, we understand the real challenges faced by young companies and are able to quickly deliver solutions that facilitate their growth and entry into new markets.



Startup Wroclaw: Is the business environment legally demanding for startups and investors?

Tomasz Szarek – Managing Partner at SDZLEGAL SCHINDHELM: Of course, there are several main reasons for this. First of all, both startups and investors operate under several legal regimes at once, including corporate, tax, intellectual property, personal data protection, and consumer protection regulations. Let's remember that this is just a drop in the ocean of regulations. In addition, the pace of change is often dizzying. Founders are often busy scaling their businesses and need advisors who take care of other aspects of the venture so that they can pursue their goals without disruption.

Startup Wroclaw: So how should entrepreneurs who are just entering the market cope?



Piotr Wyszumirski – Manager at SDZLEGAL SCHINDHELM: Entrepreneurs entering the market should think about business development strategically – from day one. This means not only refining the product or service, but also building solid legal and organizational foundations. In practice, this includes: (i) choosing the right legal form and shareholding structure, (ii) ensuring the protection of intellectual property (brands, technology, know-how), and (iii) regulating relations with investors.

Startup Wroclaw: What problems do you most often identify in startups once they come under your wing?

Marcin Śledzikowski – Partner at SDZLEGAL SCHINDHELM: Most often, we encounter a lack of an orderly legal structure and unregulated intellectual property issues, which can hinder development or scare off investors. There are also frequent gaps in contracts with key employees and technology partners. Our task is to quickly "clean up" these areas so that the startup can develop safely.

Startup Wroclaw: Where do you start when a young team of founders comes to your law firm?

Piotr Wyszumirski – Manager at SDZLEGAL SCHINDHELM: We start with an audit of the legal and business situation — we check how the company operates, how relations between the founders are regulated, what is already protected (e.g., brand, technology), and where the risks lie. Then we prioritize actions: from securing intellectual property and key agreements to preparing a structure ready for an investor. The idea is to enable a young team to focus on the product and development, with a solid legal foundation.

Startup Wroclaw: And what happens when an investor enters the game?

Marcin Śledzikowski – Partner at SDZLEGAL SCHINDHELM: When an investor enters the game, our task is to secure the interests of the founders and ensure transparent rules of cooperation. We analyze the terms of the investment agreement, ensure a clear division of rights and obligations, exit mechanisms, and protection of key assets such as intellectual property. We want the investment to be an impetus for growth, not a source of conflict or loss of control over the company.

Startup Wroclaw: Okay, let's move on to everyday life. What do you do "day in and day out" for startups and funds?

Tomasz Szarek – Managing Partner at SDZLEGAL SCHINDHELM: On a daily basis, we not only provide legal advice, but also actively participate in the startup ecosystem. We take part in mentoring initiatives, acceleration programs, and industry events, where we share our knowledge and experience. This allows us to stay close to the real challenges faced by founders and funds, and our advice is always grounded in current trends and market practice.

Startup Wroclaw: Finally, if you had to give one piece of advice to a founder, what would it be?

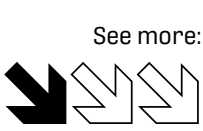
Piotr Wyszumirski – Manager at SDZLEGAL SCHINDHELM: Take care of the legal foundations of your business as early as possible – because it is easier to build them well than to fix them later. A solid structure, clear rules of cooperation, and secure intellectual property will give you freedom of action, confidence in talks with investors, and time to focus on what is most important – product development and market acquisition.

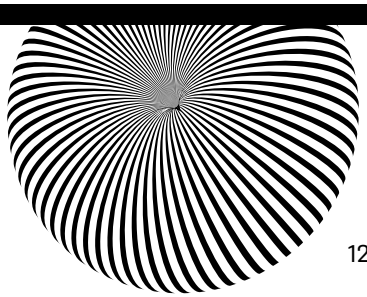
Startup Wroclaw: One more thing, how do you see the future of Wrocław's startup ecosystem?

Marcin Śledzikowski – Partner at SDZLEGAL SCHINDHELM:

> **Wrocław has everything it needs to become one of the most important innovation hubs in Europe – great universities, talented people, and a growing investor base.**

See more:





Expert Comments

Jan Jakub Cendrowski

Director of inQUBE, University Business Incubator

BIO

Business strategist with experience in brand design, campaigns, and online marketing tools. He gained his experience in the telecommunications industry and as a manager in advertising agencies. He has also worked with startups, creating their marketing strategies from scratch.

Is trust a value to you? Do you identify it as one of the main assets of the local startup environment?

Trust is a key value for me—without it, no ecosystem can survive, because startups are relationships based on risk and open communication. Based on trust, we have managed to build a committed, highly inclusive community at inQUBE, comprising students, first-time founders, investors, academics, and external experts who support entrepreneurs from our community through individual consultations and mentoring. Our activities have been noticed by large entities, which is why we have managed to establish lasting relationships with, for example, BNY and Sebastian Kulczyk's inCredibles program. We also strive to organize discourse on the startup industry, e.g., by organizing conferences and smaller events. All these initiatives operate solely on the basis of trust between the participants.

It seems to me that at inQUBE we try to be a link (a translator?) and find a common language for all the parties mentioned in the question. I also believe that such linguistic diversity does not have to be harmful, as long as there are "links" within the ecosystem. So far, however, we seem to have managed to avoid silos in Wrocław – let's continue on this path and simply build even more bridges.

What is the biggest untold story of the Lower Silesian startup ecosystem?

The biggest untold story is the silent migration of talent – many graduates of Wrocław universities, educated in tech and innovation, are leaving for Warsaw or Berlin in search of better opportunities. The same applies to the most talented high school graduates, who choose foreign universities, e.g. British ones. This is a story about potential that we may be losing as a region.

What are the biggest invisible barriers to entering the ecosystem? Why these in particular?

I do not see any major barriers. Let's agree: startups and entrepreneurship are interesting to a few percent of the population, and that is not going to change. Some people certainly view participation in the ecosystem as not guaranteeing, from their perspective, the possibility of obtaining financing for their startup/idea. And the prospect of obtaining financing is the main "motivator" that drives some people to act/get involved.

How has the availability of capital in Wrocław and Lower Silesia changed over the last 5 years?

In my area, i.e., the "incubation" stage, things are not looking good. There is still a lack of seed capital for very early-stage companies. The situation is somewhat saved by so-called boosters, although obtaining this money is complicated in formal terms.

What kind of support do you expect at the EU, national, regional, and local levels?

EU: More grants for innovators without bureaucracy.

Government: Simplified taxes for startups and funds for early-stage projects.

Local government: Municipal support for early-stage financing (you can always dream).

Local: As above, but at the next stage of a given project's development.

Natalia Świrska-Załuska

Startup Program Manager
OVHcloud

BIO

Startup Program Manager OVHcloud for Central and Eastern Europe, where she designs initiatives to support tech startup growth. Previously, she founded and led an AI real estate startup focused on automated property valuations, earning recognition such as Businesswoman of the Year 2016, Forbes 30 Under 30, and Strong Women in IT. A finalist in the New York Startup Competition (Propel by MIPIM), Natalia is also passionate about women's leadership in technology and mentors aspiring professionals. In her free time, she enjoys hiking, skiing, and traveling.

Are we really a supportive community or do we just like to say that about ourselves? If so, how do we support each other?

My experiences with the Wrocław startup community have been nothing but positive – I know that, on a very human level, I can truly rely on people from this ecosystem. What I see here is a strong drive to take action, a lot of motivation, and genuine openness to learning and expanding knowledge. What really sets this community apart, in my opinion, is the spirit of authentic networking. It is not just about chasing business opportunities or exchanging contacts – it is about the genuine willingness to get to know another person, to hear their story, and to learn from their experiences. That human dimension makes the Wrocław ecosystem not only supportive but also inspiring.

If you could transfer one proven element from another ecosystem, what would it be and how would you adapt it to the local context?

If I could bring one proven element from another ecosystem, I would take the deep founder-to-founder mentorship culture from Berlin. In Berlin, experienced entrepreneurs who have already scaled or exited their companies are very active in guiding younger founders, not only through formal programs but also in very informal, peer-to-peer settings.

In Wrocław, we already have a strong sense of community and openness, but what we are still missing is a critical mass of role models with international scale-up experience. Adapting this to the local context could mean creating structured opportunities for successful founders – even from outside the region – to spend time here, share their stories, and mentor early-stage teams. Over time, as more Wrocław-based startups grow and succeed, this culture could become self-sustaining, turning our ecosystem into one where knowledge and experience circulate as freely as enthusiasm and energy already do today.

Have startups become for Gen Z what corporations were for millennials only withbetter branding and a greater illusion of freedom?

I would not say startups are just the new corporates for Gen Z with cooler branding and a bit more "freedom." There is a real difference. Gen Z cares a lot about purpose, flexibility, and having an impact, and startups often give them a chance to feel that more directly than in a big corporation.

Of course, startups can sometimes fall into the same traps — long hours, constant pressure, blurred lines between work and personal life. The difference is that Gen Z tends to call it out faster and won't just accept it quietly.

Here in Wrocław, I feel the community still has that genuine closeness and space to grow as a person, not just as an employee. The challenge will be to keep that spirit alive as startups scale, so they do not just become "corporates in sneakers."

> Wrocław in my heart forever!

Anna Górecka, PhD

Director
Academic Entrepreneurship Incubator, Wrocław University of Science and Technology

BIO

Expert in technology transfer and academic entrepreneurship. OECD advisor, guiding deep tech ventures from lab to market and driving innovation in higher education.

If you were to identify missing activities and institutions in the startup ecosystem that should operate locally, what would they be?

Lower Silesia needs a central "one-stop" platform for startups — combining clear navigation through support programs, legal/IP advisory, and investor matchmaking. The ecosystem currently lacks a robust acceleration program with international reach and a flagship innovation hub that unites startups, universities, corporates, investors, public institutions, creatives, and deep tech ventures under one roof. This hub should integrate incubation, prototyping labs, corporate co-development, and direct investor access, with a strong focus on deep tech — from technology validation to global market entry. Co-created and jointly managed by multiple institutions, it should leverage university infrastructure, engage a broad range of ecosystem actors, and involve active city participation in providing infrastructure, coordination, and long-term funding. At the regional level, coordinated access to specialized R&D facilities and targeted innovation vouchers would ensure continuity and prevent founders from falling into the "support gap" between funding stages.

Patrycja Radek

Acceleration Manager, Startup Booster for Social Impact SWPS University

BIO

Patrycja has been in the startup world for 15 years. She holds a PhD in leadership, with a focus on innovative R&D based projects. She focuses on developing impactful innovations and diverse, efficient teams.

As an ecosystem, do we have a common language or does everyone speak their own dialect (scientific, business, investment)?

Yes and no! Fortunately, as an ecosystem, we have different languages and approaches. Our diversity allows us to complement each other, develop and approach the issue of supporting and developing innovation and startups from various angles. We reach different audiences at many stages of innovation development. At the same time, we are familiar with each other and cooperate between organisations within the ecosystem. The fact that we know each other and share a lot in common allows us to collaborate, for example, during pre-incubation, which we do at the SWPS University – Change it – Impactful Innovation Challenge. During

this programme, we work closely with the Incubator of Wrocław University of Science and Technology. By forming such complex teams, students can take a comprehensive approach to designing solutions – thinking about social or environmental issues, analysing needs and users, social and environmental impact, and then considering the technology and business model that will enable the solution to be scaled up.

What is the one question every startup should ask itself before going after money but almost never does?

Why and for whom are the fundamental questions to start with? We discuss this so often, and yet the solution itself can seduce founders who forget that solving real user needs and searching for valuable niches that address what people need, expect, and desire is crucial. Today, however, I want to emphasise social and environmental impact. What is the real, significant global problem that the startup addresses? What will be the impact of the startup's activities, and can the solution have a positive social and environmental impact? How can this impact be described and measured? These are the current challenges. Awareness of a positive impact will become increasingly important in the eyes of those investing in startups.

Today, when designing innovation, we talk about a regenerative approach, i.e. not just about not harming the world, but about repairing it. At the same time, there is a lot of hype and talk, but relatively little discussion about measuring impact. So, rather than asking one question, I will expand the list of questions to include what positive impact we have on the planet and how we will measure it.

Dominika Duda

Program Director
Venture Café Warsaw Foundation

BIO

Graduate of Erasmus University in Rotterdam with a Master of Science in Health Economics, Policy and Law, and the University of Silesia with a bachelor's degree in Political Science with a specialization in Social Policy and Economics.

What is the Lower Silesian ecosystem doing really well... but what might paradoxically slow it down in the long run?

I am truly impressed with the work of Startup Wroclaw and the role it plays in the ecosystem. You act as a real "one-stop shop," bridging accelerators, public administration, corporations, and of course startups. Coming from the Warsaw ecosystem myself, I will admit I feel a bit jealous (in the best possible way) of how you manage to connect all these dots and create such a warm, welcoming atmosphere.

Why do I think this could also become a challenge in the longer run? Because at the national level it is extremely difficult to sustain such a productive, agile, and friendly environment. Not impossible, of course, but scaling good ecosystem practices is often complicated by the "everyone minds their own patch" mentality and, at times, unnecessary bravado.

That said, I sincerely hope - and will do what I can to support this - that the Lower Silesian ecosystem continues to be seen as a role model, a case study of good practices, and a place where diversity, innovation, and local flavor come together to form an explosive mix.

What is the biggest untold story of the Lower Silesian startup ecosystem?

How do natural disasters shape innovation and resilience in Lower Silesia? As someone who remembers how badly Wrocław was hit in 1997, I am fascinated by how those events may have influenced the way local authorities and citizens now approach innovation.

How would you change the way Wrocław/Lower Silesia "tells its story" to the startup world?

What is missing is a strong, consistent narrative - everything else is already working quite well. I would probably suggest building storytelling around the struggles from the region's past, or around its diversity and uniqueness.

Lower Silesian Universities and Research Centres Showcase

In numbers...

30

Universities and higher education institutions

A diverse range of institutions provides a comprehensive educational offering in science, engineering, technology, medicine, humanities, environmental studies, law, arts, mathematics, social sciences, business, agriculture and more.

117 600

Students creating a dynamic talent pool

Ensures a constant influx of fresh ideas and skilled individuals.

29 300

Graduates entering the market annually

A steady stream of well-educated professionals enters the local job market each year.

9 375

Foreign Students infusing global perspectives

A significant international student community adds to the multicultural and dynamic atmosphere of the region.

400+

R&D and IT Centres

A robust landscape of innovation and technology development positions the region as a leader in advancing research and development, attracting forward-thinking companies and top-tier tech talent dedicated to shaping the future.

450+

Student organizations, clubs, and science groups

A vibrant and diverse network of student clubs fuels academic curiosity, creativity, and community engagement, enriching the student experience across Lower Silesia.

96%

Students Speak English

The high level of English proficiency makes for a globally competitive workforce.

19 570

Students in Engineering

Providing the technical expertise for deep-tech and manufacturing startups.

10 000

Students in ITC & Related Fields

Fueling the booming IT and software development scene.

24 500

Students in Finance, Administration & Management

Creating the business leaders and operational experts of tomorrow's successful companies.

5 400

Students in Language Studies

Supporting the internationalization of local startups.

4 500

Law Students

Ensuring a strong foundation in legal and regulatory matters for new ventures.

Major universities and research centres

UNIVERSITIES

- University of Wrocław
- Wrocław University of Economics and Business
- Wrocław University of Science and Technology
- DSW University of Lower Silesia Wroclaw
- Wrocław University of Environmental and Life Sciences
- Wrocław Medical University
- SWPS University of Social Sciences and Humanities
- WSB – Merito Universities
- Karkonosze University of Applied Sciences, Jelenia Góra
- Coventry University Wrocław

MAJOR RESEARCH CENTRES

- Institute of Low Temperature and Structure Research, Polish Academy of Sciences (INTiBS)
- Łukasiewicz – PORT Polish Center for Technology Development
- Ludwik Hirszfeld Institute of Immunology and Experimental Therapy, Polish Academy of Sciences
- Lower Silesian Oncology Center
- Wrocław Centre for Technology Transfer (WCTT)

Note: These are some of the many more universities and research centres in Lower Silesia.

Founders and startups from Lower Silesian academia

The academic institutions of Lower Silesia, with Wrocław as a major hub, have a proven and significant history of cultivating entrepreneurial talent.

Graduates from this region's universities have gone on to create successful startups and even unicorns, with a footprint extending from Poland to the global stage. Data from the "Map of the Polish ecosystem," created by Dealroom and PFR, provides a clear picture of this trend and underscores the pivotal role of three institutions: Wrocław University of Science and Technology (Wrocław Tech), the University of Wrocław (UWr), and Wrocław University of Economics and Business (WUEB).

606
Alumni-founded startups

343
from Wrocław Tech

109
from UWr

110
from WUEB

Additionally other universities from Lower Silesia also have **44** alumni-founded startups. These includes **11** from DSW University of Lower Silesia (DSW), **7** from Wroclaw Medical University (UMW), **6** from Wrocław University of Environmental and Life Sciences (UPWr), **6** from the Eugeniusz Geppert Academy of Art and Design in Wroclaw (ASP), **4** from International College of Logistics and Transport (IULT), **3** from Technical Academy of Informatics in Applied Sciences (ATINS), **3** from Wroclaw Business Academy (WAB), and **2** each from Wyższa Szkoła Informatyki i Zarządzania "COPERNICUS" (WSIZ), and Wroclaw University of Health and Sport Sciences (AWF). This data highlights the significant volume of entrepreneurial activity originating from the region's academic institutions.

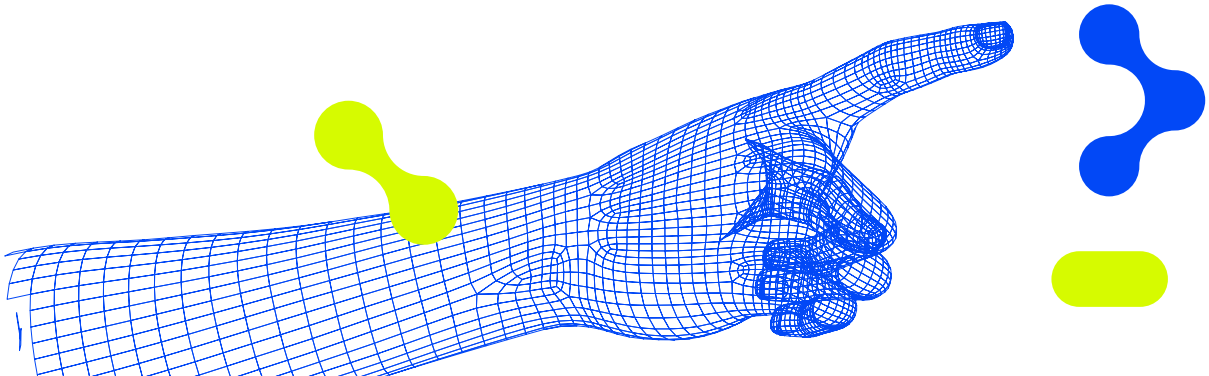
581
Alumni founders

342
from Wrocław Tech

100
from UWr

99
from WUEB

Additionally other universities from Lower Silesia have **40** alumni-founders. These include: **9** from DSW, **8** from UMW, **6** from UPWr, **4** from ASP, **3** from IULT, **3** from WAB, **2** from AWF and **1** from WSIZ. The number of founders closely mirrors the number of startups, suggesting that many ventures are launched by small, dedicated teams or solo founders. Wrocław Tech is again the dominant force, producing nearly three times as many founders as the next leading university. This points to a strong institutional environment that not only fosters innovative ideas but also empowers individuals to pursue them.



35
Founders (>$10M raised)

14
from Wrocław Tech

12
from UWr

6
from WUEB

3 other founders, **2** from DSW and **1** from UMW also have founders who have raised over $10 million. This metric is a key indicator of the quality and scalability of the ventures. Raising significant capital (over $10 million) signals strong market validation and high growth potential. While Wrocław Tech leads, the strong showing from UWr, with 12 such founders, is particularly noteworthy. It shows that UWr has a higher rate of scaling up startups as compared to other universities.

4
Alumni-founded unicorns

1
from Wrocław Tech

3
from UWr

The presence of four alumni-founded unicorns (companies valued at over $1 billion) is a testament to the potential nurtured within Lower Silesian academia. This also highlights that the ecosystem, while maintaining the strong numbers in early stage startups, needs to increase its focus on scale ups. The viewpoints from startups and investors analysed earlier in the report also point to the same.

7
Alumni-founded future unicorns

2
from Wrocław Tech

4
from UWr

1
from WUEB

Looking ahead, the pipeline of high-potential ventures remains promising. The identification of seven "future unicorns" (fast-growing startups projected to reach a $1 billion valuation) suggests that the graduates are increasingly scaling their startups.

3
Spinouts

All
from Wrocław Tech

Spinouts represent the direct commercialization of university research and intellectual property (IP). This statistic, while modest, is significant because all three recorded spinouts originate from Wrocław Tech. This points to a specialized strength and institutional focus at Wrocław Tech on technology transfer and the creation of deep-tech ventures. Unlike alumni startups, spinouts require robust internal mechanisms for IP management and support for academic staff to transition their research into market-ready products. This concentration solidifies Wrocław Tech's role as the primary driver of technology transfer, converting academic research into commercial impact within the local ecosystem.

Academia's focus and entrepreneurial culture

To understand the internal environment for entrepreneurship within Lower Silesian Academia, the Startup Wroclaw survey gathered survey responses from 14 academic institutions.

This section analyzes the primary focus of their entrepreneurship support efforts and the prevailing culture of commercialization within these institutions.

Figure 8.a. illustrates the strategic priorities of academic institutions regarding entrepreneurship. A significant 50% of respondents indicate that supporting both student-led ventures and research commercialization are an equal priority. This balanced approach suggests that many institutions aim to foster a comprehensive entrepreneurial ecosystem. Research commercialization and spin-offs are the primary focus for 28.6% of institutions, highlighting a strong emphasis on leveraging institutional IP. Conversely, 14.3% prioritize student-led entrepreneurship, focusing on ventures that may not be based on university IP. A small minority, 7.1%, state that neither is a formal priority at this time.

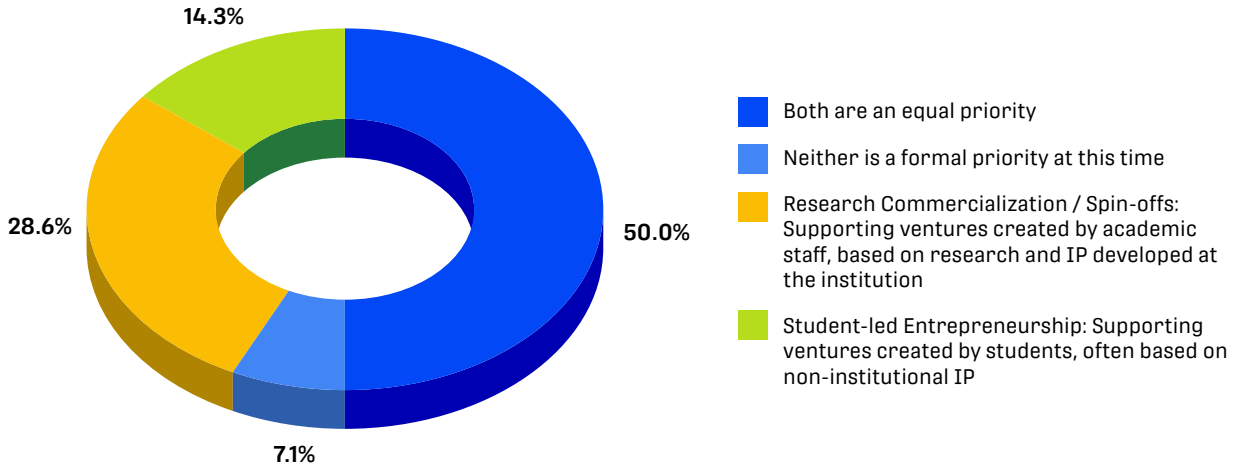


Figure 8.a. Primary focus of entrepreneurship support efforts within Lower Silesian Academia (N=14)

When asked to rate the culture of entrepreneurship, the responses suggest there is considerable room for growth. As seen in Figure 8.b., a clear majority (64.3%) describe the level of support as "Average," indicating that while some foundational support exists, it is not a primary focus. Just over a fifth of respondents (21.4%) rate the support as "Good," with several resources available. Finally, 14.3% perceive the support as "Weak," with little to no encouragement for entrepreneurial activities. This indicates that while entrepreneurship is present, it is not yet deeply embedded in the culture of most institutions.

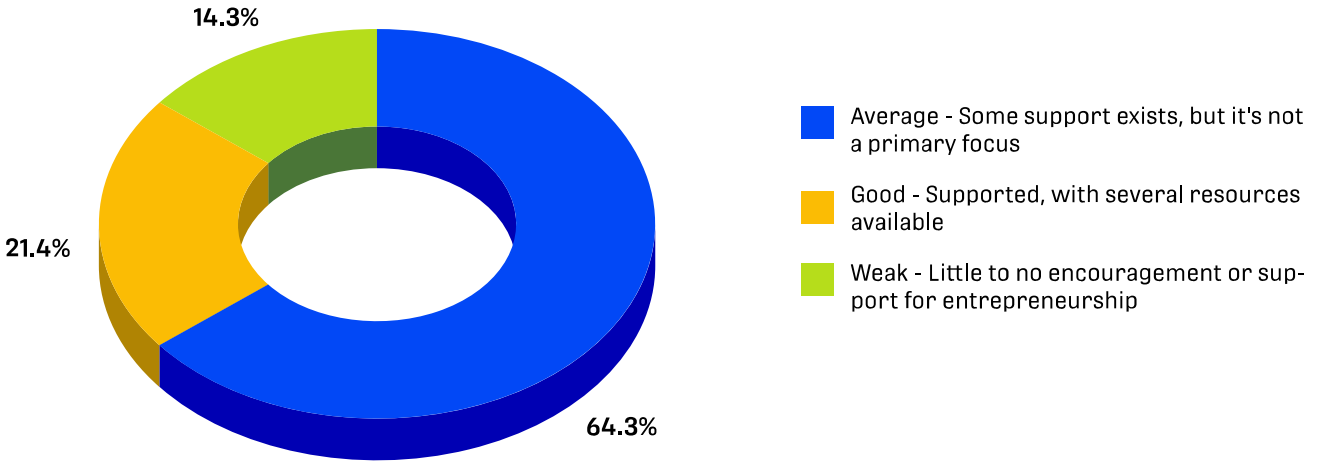


Figure 8.b. Perceived culture and support for entrepreneurship within academia (N=14)

Academia's key support and collaboration mechanisms

Throughout this report, stakeholders have noted that Lower Silesian talent is a key advantage, and the data in Table 8.a. shows how Academia is cultivating this talent.

The support mechanisms offered are logically aligned with the institutions' stated priorities. For example, this targeted approach is evident in the data: the four institutions focused primarily on research commercialization are all supporting in patent applications and IP management. Conversely, the seven institutions that treat both students and research as an equal priority are the main drivers of mentoring programs and on-campus incubators. This shows a thoughtful allocation of resources aligned with their stated strategic goals.

Table 8.a. Types of support offered by Academia, segmented by primary focus (N=14)

Academia's primary focus	Academia's support student and staff entrepreneurship					
	Credit-bearing courses on entrepreneurship	Mentoring programs (e.g., with alumni or business leaders)	Access to seed funding for student/staff ventures	Dedicated prototyping labs or makerspaces	An on-campus incubator or accelerator program	Support with patent applications and IP management
Student-led Entrepreneurship: Supporting ventures created by students, often based on non-institutional IP	0	2	0	0	1	1
Research Commercialization / Spin-offs: Supporting ventures created by academic staff, based on research and IP developed at the institution	2	0	1	2	0	4
Both are an equal priority	5	6	2	0	5	5
Neither is a formal priority at this time	0	1	0	0	0	0

However, Figure 8.c. suggests that industry collaborations are often a light touch. The most common forms of engagement are guest lectures and internships. There focus on talent development, but deeper, more resource-intensive collaborations like joint grant applications and industry-sponsored research are less frequent. This may limit the potential for groundbreaking, commercially-driven R&D partnerships. An opportunity for both Corporations and Academia to build on, and local ecosystem to facilitate.

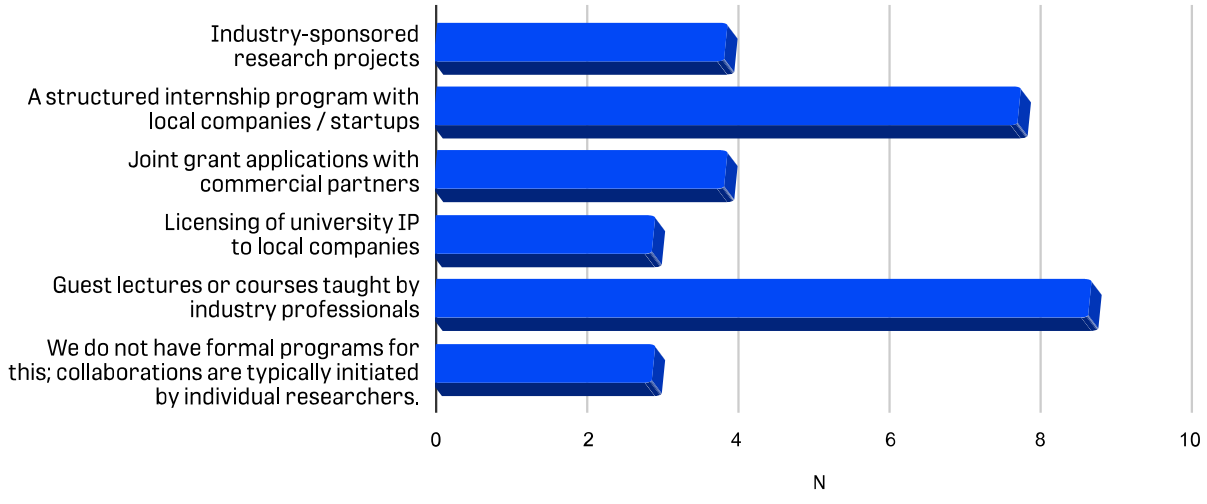


Figure 8.c. Primary methods of collaboration between academic institutions and industry partners (N=14)

Academia's perception of ecosystem

A critical theme emerging from the data is a disconnect between academic institutions and the startup ecosystem. Figure 8.d. reveals that a combined 89% of academic respondents feel either "Neutral" or "Poorly aligned" with the local startup community.

This disconnect directly leads to the challenges identified in Figure 8.e. The top obstacle, cited by 10 out of 14 respondents, is a lack of funding for proof-of-concept, the classic "valley of death" for early-stage research. Other key challenges, a lack of business skills among researchers and insufficient connections to investors, are direct symptoms of this poor alignment.

Academia has the innovation but indicates that it faces challenges with the network and commercial know-how to bring it to market.

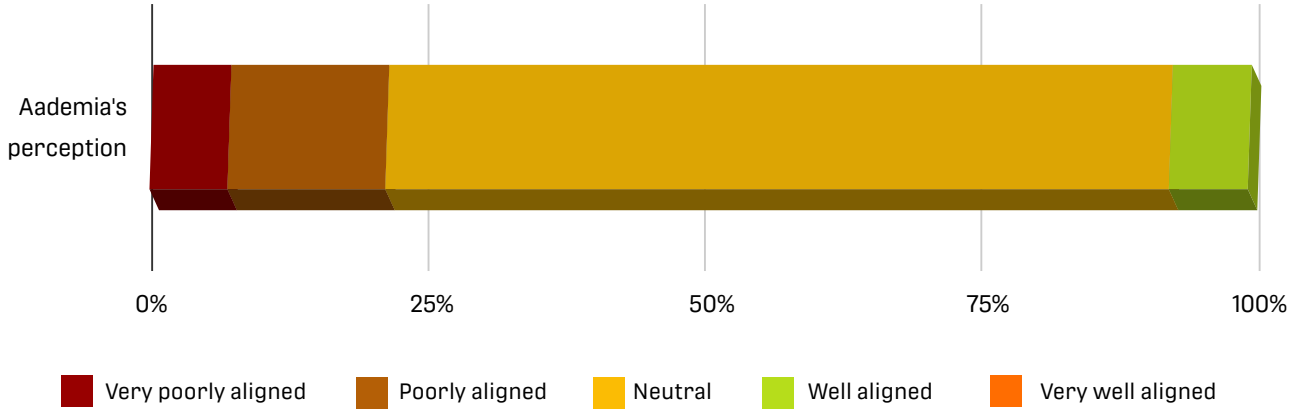


Figure 8.d. Academia's perception of its alignment with the Lower Silesian startup ecosystem (N=14)

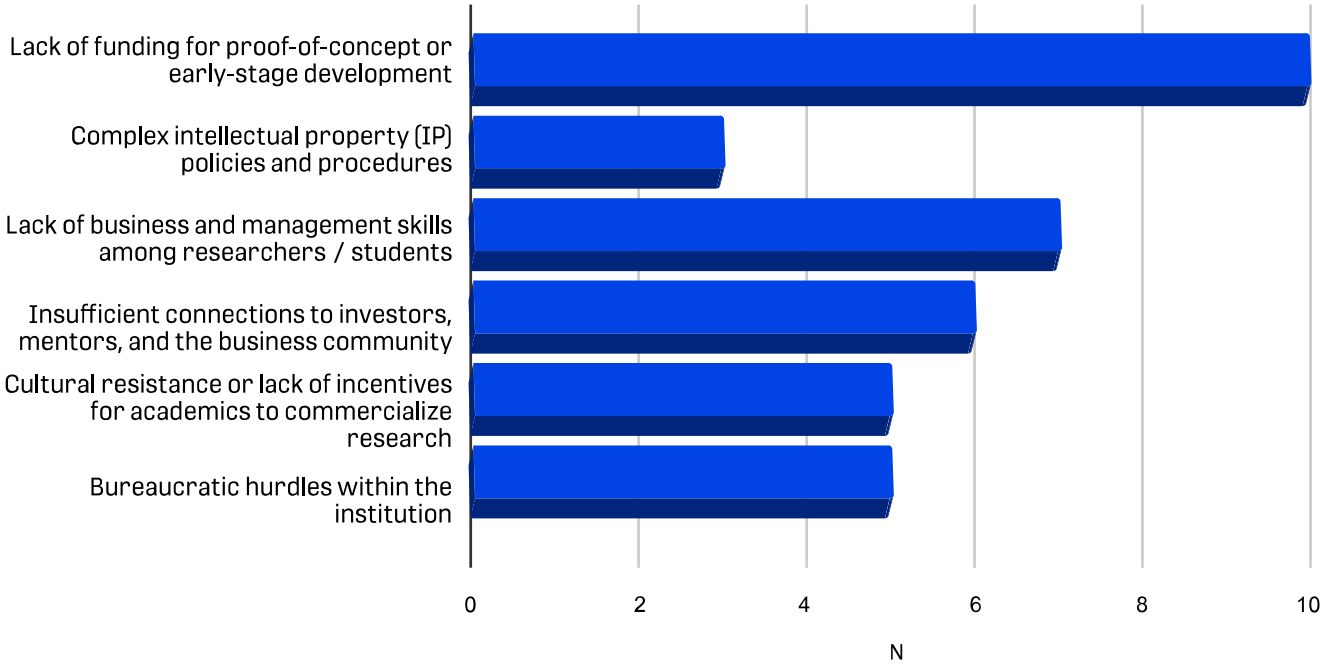


Figure 8.e. Primary obstacles to commercialization identified by Academia (N=14)

Ecosystem support desired by Academia

Academia's expectations from the ecosystem are not just for capital, but for connection and translation to bridge the gap identified above.

Figure 8.f. shows the most desired form of support is better promotion of academic research to the business community. This is a clear call for a "translator" to help package academic R&D for a commercial audience. The second major need is for practical workshops on topics like IP, company formation, and fundraising, directly addressing the skills gap. In essence, academia is asking the ecosystem for two things: "Support us to talk to you" and "Partner with us and let's think alike".

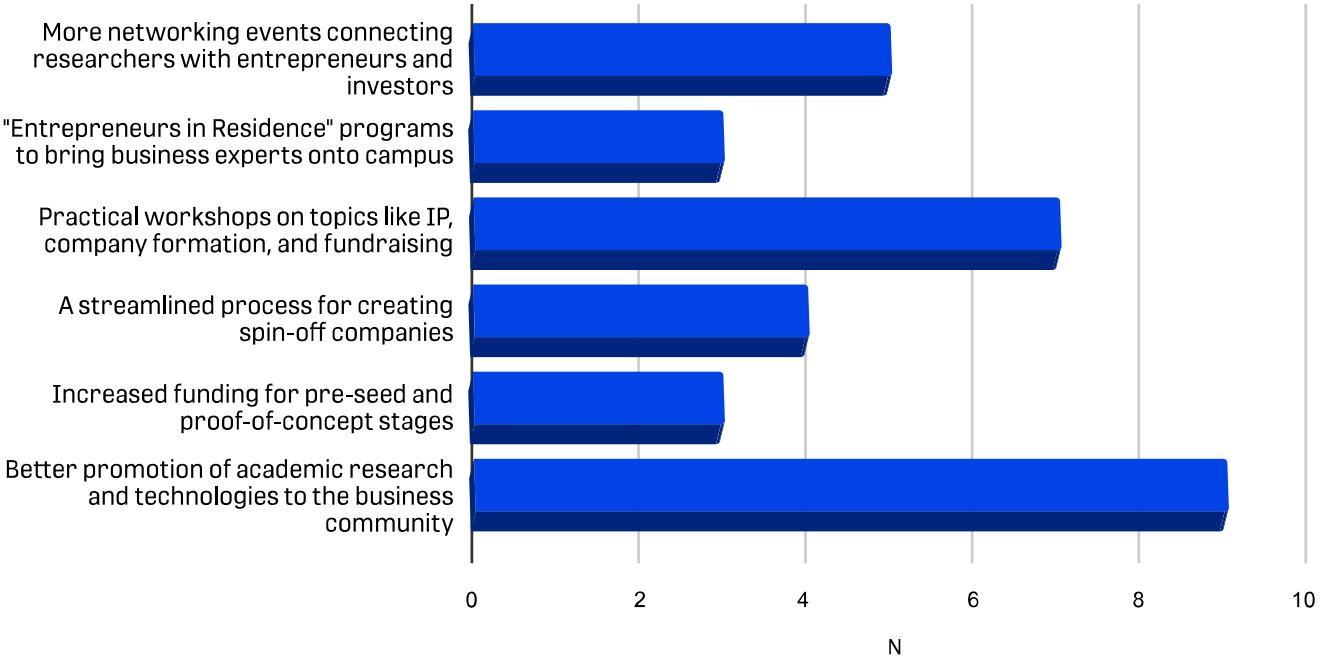


Figure 8.f. Types of support sought by academia from the startup ecosystem (N=14)

The academic institutions of Lower Silesia are a proven, powerful engine of the region's startup ecosystem, producing both a high volume of founders and world-class, high-valuation companies. However, this success exists despite an internal feeling of disconnect from the very community they help build. While universities are working to support entrepreneurship, they are hampered by a gap between their ambitions and resources, and face significant hurdles in funding, business expertise, and network access. To unlock the next wave of innovation, the ecosystem must focus on building intentional bridges to its academic partners. By creating better channels for communication, providing practical business education for researchers, and fostering a truly integrated community, Lower Silesia can ensure its greatest asset—its talent—is fully empowered to build the future.

Wrocław's computational edge

Powering science and innovation

Wrocław offers a unique, full-spectrum computational ecosystem, combining world-class classical supercomputing with pioneering quantum technology. This dual advantage positions Lower Silesia as a premier hub for deep-tech innovation.

WROCŁAW CENTRE FOR NETWORKING AND SUPERCOMPUTING (WCSS)

For more than three decades, WCSS has provided the advanced infrastructure that powers science, innovation, and digital transformation in Poland. Today, it delivers the massive-scale computing power required for the most demanding challenges in AI, big data, and cutting-edge research - supporting both academia and industry.

See more:

"LEM" SUPERCOMPUTER

Global Rank:

#80, #99 and #121 on the TOP500 list of the world's fastest supercomputers (2024, 2025).

Performance:

- Computing power: 22 PFLOPS
- CPU cores: 24 960
- Operating memory: 281,5 Terabyte RAM
- Disk space: 11 Petabytes

Focus:

Optimized for AI and Machine Learning workloads, supporting the region's top startup and research sector.

Ecosystem Role:

A full-service innovation platform providing hardware, software, and expert support to to accelerate breakthroughs in science, technology, and business. Data Sovereignty & Security - all data is stored and processed in Poland, ensuring compliance with European standards, digital sovereignty, and maximum protection of sensitive information.

ODRA 5 QUANTUM COMPUTER

A strategic gateway to the next generation of computing, tackling problems impossible for any classical machine.

Regional First:

Poland's first quantum computer using cutting-edge superconducting technology.

Core Tech:

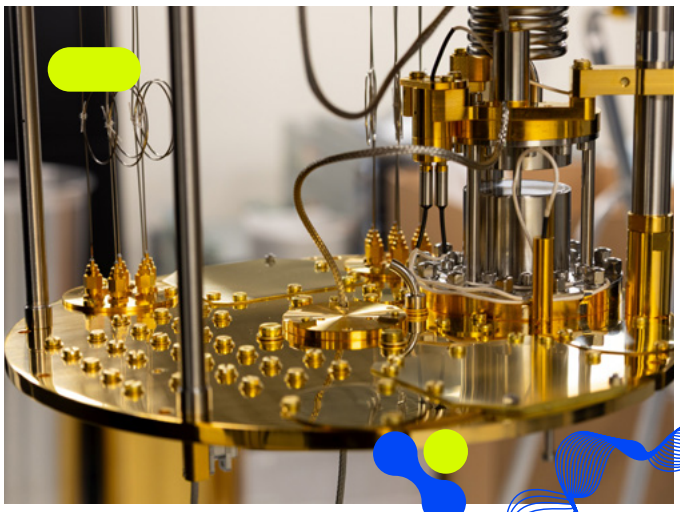
A 5-qubit system operating at -273.14°C, colder than deep space.

Global Access:

A strategic partnership with IQM provides a direct pathway to more powerful 20- and 50+ qubit systems.

Ecosystem Role:

Building a quantum-ready talent pipeline through hands-on research and new academic programs.



OPPORTUNITIES FOR COLLABORATION WITH WCSS

Supercomputing as a Service

On-demand access to advanced infrastructure for continuous high-performance workloads, supported by expert supervision.

Cloud Data Storage

Secure, large-scale data storage tailored for AI, research, and industry applications.

AI and Quantum Innovation Support

Dedicated resources and expertise for startups exploring advanced machine learning or quantum-enabled solutions.

Technology Partnership for Growth

Seamless integration with European - scale infrastructures and services, giving startups a fast track to scale and connect with international ecosystems.

Trusted Partner in Funding Applications

WCSS can join as a technology partner in EU and other grant projects, strengthening proposals with proven infrastructure and know-how.

ERC Grant holders in Wrocław

TeraERC

1.5 MEUR TERAERC

The 1.5 MEUR TeraERC project focuses on the development of chip-based technologies for room-temperature spectroscopy in the terahertz range, which our eyes cannot see. While this part of the electromagnetic spectrum is technologically challenging, it carries a wealth of information about drug authenticity, air pollution and internal structure of non-metal objects. Our team aims to democratize access to the terahertz range by providing the necessary light sources, detectors, and spectroscopic techniques operating without cryogenic cooling. On a larger scale, we contribute to an EU-wide initiative to leverage infrared photonic technologies for health monitoring and early-stage disease detection.

> The relevance of academic research (particularly in applied sciences) can be summarized by paraphrasing the famous quote: research turns money into knowledge, while business turns knowledge into money. Without investment in exploring new technologies, starting from groundbreaking research, we will always be limited to merely integrating existing solutions rather than being ahead of competitors.

Łukasz A. Sterczewski, PhD

BIO

Dr. Łukasz A. Sterczewski is an assistant professor in the faculty of Electronics, Photonics, and Microsystems at Wrocław University of Science and Technology in Poland. His research focuses on room temperature generation and detection of terahertz waves. He holds 3 international patents and has 5 years of research experience in the US including NASA Jet Propulsion Laboratory, Caltech, and Princeton. Now he continues his research journey in Poland with a newly established research team.

REHEAL4WASTE

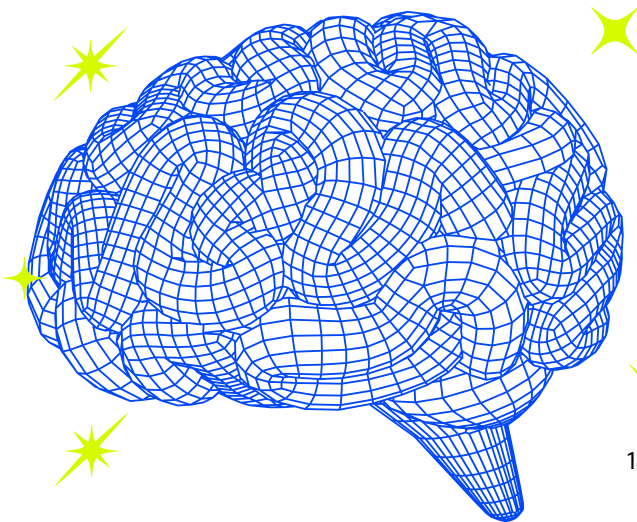
ReHeal4Waste pioneers a new approach to lithium-ion battery waste by combining metal recovery with clean energy generation. Using reverse electrodialysis, it selectively extracts transition metals such as cobalt, nickel and manganese from complex leachates while harvesting salinity-gradient energy to drive green hydrogen production. At its heart is the development of ultra-selective cation-exchange membranes that link separation and energy generation in a single stack. Scientifically, the project advances understanding of membrane structure and performance under real effluents. Societally, it cuts carbon footprint, recovers critical raw materials and enables a circular economy for sustainable batteries and clean technologies.

> As a scientist and professor, I want students to see that academic research is not an abstract exercise but a powerful force for change. By exploring bold ideas in areas such as membrane technologies and resource recovery, we can create tangible benefits for society. I believe ambitious, collaborative research empowers young minds to shape the innovation ecosystem and build a sustainable future.

Anna Siekierka, DSc, PhD

BIO

Professor at Wrocław University of Science and Technology, specialises in chemical engineering and membrane technologies. She researches electro-membrane processes, selective metal ion separation and energy recovery, pioneering lithium recovery and metal recycling from batteries. Leader of the ERC "Reheal4waste" project, she has international research experience, keynote talks, 40+ papers (h-index 18) and multiple national and international awards.



Medicine as an inspiring partner for technology

Wrocław, due to the synergy of its academic potential and business dynamism, is increasingly establishing itself on the European map as a formidable medtech hub.

We are exceptionally gratified that, as the Wroclaw Medical University, we are not merely a participant but a pivotal architect of this success, actively shaping the innovative profile of Wrocław and Lower Silesia. Medicine serves as an inspiring partner for technology and relies on it daily, not only in patient care but also in the education of students.

> The mission of Wroclaw Medical University is not only to impart knowledge but also to inspire its creative application and transformation into practical solutions.

Therefore, our curricula place a strong emphasis on cultivating competencies for the future, integrating medical knowledge with elements of management, entrepreneurship, intellectual property law, and emerging technologies. We have instituted dedicated courses in innovation and academic entrepreneurship to ensure our graduates are not only impeccably prepared for careers in healthcare but also conscientious leaders capable of pioneering innovations and founding valuable medtech ventures.

A cornerstone of our philosophy is a close and collaborative partnership with the business sector. We are convinced that the fusion of scientific potential and market experience is the bedrock for generating breakthrough innovations. Science should find practical application and be responsive to the needs of our socio-economic landscape. We attach immense importance to this pragmatic dimension of our work.

Our unique advantage is also the seamless synergy with the University Hospital in Wroclaw. Access to genuine clinical data and daily collaboration with practitioners enable us to validate innovations in a real-world setting, which substantially expedites the journey from the laboratory to the patient's bedside.

Looking to the future, we are determined to further strengthen this innovative ecosystem by attracting talent and investment. We believe that by reinforcing the partnership between science, business, and local government, we will jointly solidify Wrocław position as a leading European hub for medical technologies, recognized on the international stage.

Prof. Piotr Ponikowski, MD, PhD, FESC, FHFA

Rector of Wroclaw Medical University

Entrepreneurship in the education of engineers

At Wrocław University of Science and Technology, we believe that academic entrepreneurship is one of the most important driving forces for the development of a modern university.

Startups founded by our students and researchers are not just companies – they are laboratories of the future, where knowledge meets courage to create innovations of real significance.

We are building an entire ecosystem of support around them. The Grow Up Tech program provides young innovators with space for experimentation, gaining practical competencies, and collaborating with experienced experts. Initiatives implemented with the participation of business representatives and our alumni help them take their first steps into the world of entrepreneurship. The Academic Enterprise Incubator provides formal and substantive support, while the Center for Innovation and Business and the Wroclaw Centre for Technology Transfer support the commercialization of research, intellectual property protection, and connections with industry.

A huge role is also played by the university's faculties, which incorporate elements of entrepreneurship into the education of engineers. It is there that interdisciplinary projects are born, often becoming the seed for future startups. No less important are student research clubs, which provide a natural environment for the development of young talents.

> We create space and provide support for students to realize bold ideas – from daring constructions to technologies with significant business potential.

Our strength also lies in our participation in the Unite! alliance, thanks to which projects developed at Wrocław University of Science and Technology can benefit from a European network of laboratories, partners, and acceleration programs.

In my vision for the future, the university should be a place that not only educates engineers but also inspires leaders – capable of creating companies, solving global problems, and building bridges connecting science, business, and society.

Prof. Arkadiusz Wójs, DSc, PhD, Eng.

Rector of Wrocław University of Science and Technology

Lower Silesian public support toolkit

The local and regional support structure

There are several public support institutions in Wrocław and Lower Silesia that form the backbone of the startup ecosystem in the region. Understanding their roles is the first step for any founder or startup ecosystem stakeholder looking to navigate the local public support landscape.

CITY AND LOCAL AGENCIES IN WROCŁAW

INSTITUTION	CORE PURPOSE AND FUNCTION	WEBSITE
Wrocław Agglomeration Development Agency (ARAW)	**Primary economic and ecosystem driver** A non-profit owned by the Wrocław commune and surrounding municipalities. ARAW attracts investments, supports local business, runs initiatives to connect and promote the ecosystem. Key initiatives include: Startup Wroclaw, Invest in Wroclaw, and Study in Wroclaw.	
Startup Wroclaw	**Central information and networking hub for things related to Startup** Startup Wroclaw integrates the startup community by providing curated information, news, event organization (like Evolutions: Meetup & Showcase), and connections to corporations, academia, and government.	
Invest in Wroclaw	**Primary point of contact for business investment and support** Provides free support services for soft landing, including site selection, data analysis, and partner connections, to attract new business and assist investors in the region.	
Study in Wroclaw	**Support for international academic talent** Promotes Wrocław as a leading academic center and serves as the primary resource for international students, offering information on universities, programs, and city life.	

REGIONAL GOVERNANCE AND DEVELOPMENT AGENCIES

INSTITUTION	CORE PURPOSE AND FUNCTION	WEBSITE
Marshal's office of the Lower Silesian Voivodeship	**Regional governance and EU funds management** The regional public authority responsible for implementing the voivodeship's development strategy and managing major EU funds, including the European Regional Development Fund (ERDF) for 2021-2027.	
Lower Silesian Regional Development Agency (DARR S.A.)	**Regional development and tech park management** Supports economic transformation, particularly in the Wałbrzych sub-region. Manages the T-Park technology park and provides training, consultancy, and helps secure EU funds.	
Regional Development Agency (ARLEG S.A.)	**Regional development and business support** Offers comprehensive services for entrepreneurs, including financial instruments like loans and guarantees, advisory services, training, and support for business establishment and growth in the Legnica-Głogów Copper Belt.	
Regional Development Agency (AGROREG S.A.)	**Rural and agricultural development** Specializes in supporting the economic development of rural areas and agriculture by providing loans, advisory services, and implementing projects aimed at SMEs in the agro-industry.	

REGIONAL GOVERNANCE AND DEVELOPMENT AGENCIES

INSTITUTION	CORE PURPOSE AND FUNCTION	WEBSITE
Karkonosze Regional Development Agency (KARR S.A.)	**Regional development and cross-border cooperation** Supports the economic development of the Jelenia Góra sub-region, with a special focus on Polish-Czech cross-border cooperation, tourism, and providing comprehensive services for SMEs.	
Wrocław Regional Development Agency	**Regional development and business services** Stimulates the economic and social development of the region by providing financial services (loans, guarantees), business consulting, and supporting innovation and entrepreneurship.	

FINANCIAL INSTITUTIONS AND LOAN FUNDS

INSTITUTION	CORE PURPOSE AND FUNCTION	WEBSITE
Lower Silesian Development Fund (DFR)	**Regional financial institution** Wholly owned by the Marshal's Office, DFR provides repayable financial instruments to regional SMEs, including loans, guarantees, and equity investments to support business development.	
Lower Silesian Economic Fund (DFG)	**Business financing and loans** Provides preferential loans to micro, small, and medium-sized enterprises (MSPs) in Lower Silesia, supporting investment, liquidity, and business development.	
Wałbrzych Region Fund (FRW)	**Regional loan fund and business support** A local non-banking financial institution that supports the development of micro, small, and medium-sized enterprises in the Wałbrzych sub-region through loans, training, and advisory services.	
"Wałbrzych 2000" Foundation	**Local entrepreneurship and community support** Supports local economic development and entrepreneurship in the Wałbrzych region by providing loan funds for SMEs, managing projects, and engaging in activities aimed at counteracting unemployment.	

DIRECT BUSINESS/ENTREPRENEURSHIP SUPPORT AND ECONOMIC ZONES

INSTITUTION	CORE PURPOSE AND FUNCTION	WEBSITE
Lower Silesian Agency for Economic Cooperation (DAWG)	**Regional entrepreneurship and internationalization** A company 100% owned by the regional government, focused on supporting entrepreneurship, innovation, and internationalization. It runs an Entrepreneurship Incubator and the Investor and Exporter Assistance Department.	
Lower Silesian Chamber of Commerce (DIG)	**Business community representation and integration** A business self-government organization that represents the interests of its member companies, provides networking opportunities, training, and legal-economic consulting to support the Lower Silesian business environment.	
Western Chamber of Commerce (ZIG)	**Business self-government and advocacy** An organization of entrepreneurs that works to protect and represent their economic interests, provides legal and business consulting, and facilitates networking and cooperation among member companies.	
Legnica Special Economic Zone S.A.	**Public aid and regional support** A designated area offering public aid and tax exemptions to entrepreneurs making new investments, aiming to accelerate regional economic growth and create new jobs.	
Wałbrzych Special Economic Zone - INVEST-PARK	**Public aid and support for entrepreneurship** One of Poland's largest special economic zones, spanning three voivodeships, to attract new investment and support job creation by offering public aid, tax exemptions, and comprehensive services to entrepreneurs.	

National and EU programs

There are many grant, loan, and acceleration programs available to startups in Lower Silesia from national agencies and European Union funds. These programs represent the primary non-dilutive and preferential funding opportunities.

KEY PROGRAMS

PROGRAM NAME	MANAGING AGENCY	TARGET STARTUP (STAGE/TYPE)	SUPPORT OFFERED	WEBSITE
Startup platforms for new ideas	PARP (via FEPW)	Individuals or teams with an innovative idea (pre-company) willing to establish a company in Eastern Poland.	Incubation phase: MVP development, mentoring, business model verification. Post-incubation: Grant of up to PLN 600,000 for initial business activity.	
Startup Booster Poland	PARP (via FENG)	Micro/small enterprises (<5 years old) with an innovative product/service ready for acceleration.	Up to PLN 400,000 grant. Includes mentoring, access to corporate partners, and connections to VC funds. Offers multiple acceleration paths.	
Poland Prize (Track)	PARP	Foreign startups and founders interested in establishing a business and expanding in Poland.	Up to PLN 300,000 grant. Provides soft-landing support (legal, visa), concierge services, and a full acceleration program.	
'First Business - Support at the Start'	BGK	Unemployed persons, students in their final year, and jobseekers.	Loan upto 20 times average wage, with a preferential interest rate, 7 year repayment period, and 1year grace period.	
Poland. Business Harbour	PAIH, GovTech Polska, PARP	Foreign IT professionals, startups, and established IT companies wishing to relocate to Poland.	Special visa path, legal and business concierge, soft-landing support, and connections to investors and acceleration programs.	
(Ścieżka) Smart Path	PARP / NCBR (via FENG)	SMEs and large enterprises (or consortia) with R&D projects.	Modular support including grants for R&D, implementation of innovation, internationalization, green transition, and digitalization.	
PFR for Funds	PFR	Venture Capital and Private Equity funds	Nine different programs: Starter, Buznest, OI, KOFFI,CVC, VC, and PE. Each stimulates a different market area and distinguishes itself by its investment strategy	
European Funds for Lower Silesia 2021-2027	Marshal's office	Varies by call: includes SMEs, R&D institutions, and public bodies.	Co-financing for projects in innovation, green transition, digitalization, education, and labor market development.	
Horizon Europe	European Commission, National contact point at NCBR	Science-based and deep tech startups, innovative SMEs, research institutions.	Significant grants for groundbreaking research and innovation projects, often requiring international consortia.	
Ideas Powered for business SME Fund	European Union Intellectual Property Office (EUIPO)	Small and medium-sized enterprises (SMEs).	Vouchers for partial reimbursement of intellectual property (IP) protection costs, such as trademark and patent fees.	

MORE INFORMATION

For information about various grants and support for business in Poland:

Business in Poland	Polish Investment and Trade Agency	PFR Ventures	National Centre for Research and Development (NCBR)	GovTech Poland

Public Support Matrix

I need...

This matrix synthesizes the public toolkit into an actionable, needs-based guide. Founders can identify their immediate challenge and be directed to the most relevant organizations and programs. Please note that this is not an exhaustive list of contacts.

The need (I am/I need...)	Primary contacts (Start Here)	Secondary contacts / Other resources
...an idea and want to start a company.	**Startup Wroclaw** (for connections and ecosystem info).	**University Incubators** for students, graduates, and researchers. **Wrocław Technology Park (WPT)** for pre-incubation support.
...a loan to start my business.	**BGK Financial Intermediaries** (List available on BGK website).	**Lower Silesian Development Fund (DFR)** and its network of intermediaries. **Bank Gospodarstwa Krajowego and its 'First Business** - Support at the Start'.
...an early-stage grant for my new company.	**PARP-accredited Accelerators** (List available on PARP website).	**Lower Silesian Development Fund (DFR)** for potential equity investment. **Startup Booster Poland** (up to PLN 400k). **Development of Start-ups in Eastern Poland** (up to PLN 600k, post-incubation).
...funding for a high-risk R&D or deep tech project.	**National Centre for Research and Development (NCBR)** as the main R&D funding agency.	**Wrocław Technology Park (WPT)** for access to specialized labs and R&D consulting. **PARP** for innovation-focused grants. **Horizon Europe** for large-scale, international R&D projects.
...to relocate my foreign startup to Lower Silesia.	**Startup Wroclaw** (for startups) or **Invest in Wroclaw** (for large companies).	**PARP** - accredited Accelerators running the Poland Prize track. **Polish Agency for Investment and Trade (PAIH)** for general investment support. **Poland Prize** (grant up to PLN 300,000, visa pathway, soft-landing services).

Where do I go?

The need (I am/I need...)	Primary contacts (Start Here)	Secondary contacts / Other resources
...office space, a lab, or a workshop.	**Wrocław Technology Park (WPT)** for a wide range of office/lab spaces and incubators.	**University Incubators** (inQUBE, AIP) for academic entrepreneurs. **DAWG's triQube Incubator for** modern office space. **WPT STARTUP HUB** (offers up to 90% support for office space rental for young companies).
...mentoring, training, and business advice.	**Startup Wroclaw** for events and connections to mentors.	**University Incubators** for structured mentoring programs. **Wrocław Technology Park (WPT)** for specialized training and consulting. **DAWG and DARR** for business and export consulting. **Startup Booster Poland & Start-up Platforms** (both include intensive mentoring and expert services).
...help with international expansion.	**Polish Agency for Investment and Trade (PAIH)** as the national agency for foreign expansion.	**Going Global 4.0 - Internationalization of Lower Silesian Entreprises** program run by the Marshal's office of the Lower Silesian Voivodeship. **Lower Silesian Agency for Economic Cooperation (DAWG)** via its Investor and Exporter Assistance Dept. **Startup Booster Poland** - "Go Global" track. **Enterprise Europe Network** (often available via DARR).
...to connect with the local ecosystem.	**Startup Wroclaw** (attend their meetups and conferences like Evolutions).	**Made in Wroclaw** (annual conference and expo by ARAW). **Wrocław Technology Park (WPT)** for networking events within the park's community.
...to find a corporate partner or pilot customer.	**PARP** - accredited Accelerators (many have corporate partners).	**Startup Wroclaw** (connects startups with larger companies). **Startup Booster Poland** - B2B/B2A track (focuses on collaboration with a "Technology Recipient").

Analysis of Public Support representatives' perceptions

This section outlines the perspectives of a select group of **nine representatives** from *Public Support* (public sector and government-affiliated organizations). Given the small sample size, the following data is presented to offer qualitative insights and highlight recurring themes from these key stakeholders, rather than to provide statistically significant conclusions about the entire sector. The respondents include municipal and regional government bodies, a special economic zone, a vocational training organization, a municipal company, and a regional development agency, see Figure 9.2.a.

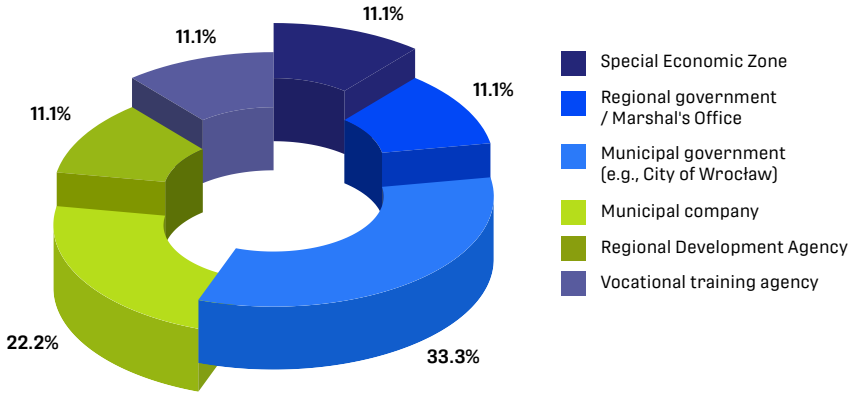


Figure 9.2.a Distribution of survey respondents (N=9)

Thematic Findings

OBJECTIVES

The survey data reveals clear and consistent objectives across nearly all public support institutions: driving broad socio-economic outcomes.

6 out of 9 respondents

Have a primary objective of job creation and regional economic growth.

6 out of 9 respondents

Have a primary objective of fostering innovation and developing new technologies.

Only 2 out of 9 respondents

Have a primary objective of attracting, developing, and retaining entrepreneurial talent.

Only 2 out of 9 respondents

Have a primary objective of:

- Building a dense, collaborative startup community.
- Supporting the growth of specific strategic industries.
- Addressing specific social or environmental challenges.

Only 1 out of 9 respondents

Have a primary objective of "Generating strong financial returns (ROI)."

This data confirms that the public sector's role is perceived as that of a market facilitator and enabler, not a commercial investor.

SUPPORT TOOLS

The data shows that public support in Lower Silesia is relational and informational, with institutions acting primarily as connectors and guides rather than direct funders. There is a clear scarcity of "hard" financial instruments like grants or subsidized loans.

8 out of 9 respondents

Provide non-financial support only, such as information, networking, and ecosystem promotion. One institution specified its offer as access to the "network of the entire ecosystem".

None of the respondents

Reported offering non-repayable grants, subsidized loans or loan guarantees.

Only 1 out of 9 respondents

Offer vouchers for expert services, direct equity investments or tax incentives.

This confirms that the public sector's primary operational role is to build and maintain the ecosystem's connective tissue, leaving direct capital injection to private or other specialized actors.

CHALLENGES

The greatest challenges faced by public institutions are not external market dynamics but internal, systemic hurdles related to resources and bureaucracy. This suggests that their ability to act is constrained more by their own operational environment than by the fast-changing startup world.

7 out of 9 respondents

Cited budgetary constraints as a primary challenge.

6 out of 9 respondents

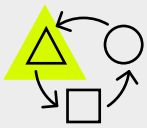
Cited long or complex legislative/ procurement processes.

4 out of 9 respondents

Cited ensuring coordination with other public and private support organizations.

Only 1 out of 9 respondents

Cited reaching the right target audience (startups) with their offer.



None of the respondents

Cited difficulty in keeping pace with rapid market/technology changes or measuring the long-term impact of their programs as top challenges.

This focus on internal constraints indicates that the public support system's effectiveness is often dictated by its own structural limitations rather than by a failure to understand or adapt to market needs.

SUCCESS METRICS

There is no single, universally adopted metric for success, and a significant portion of the ecosystem's key actors are still formalizing how they measure their impact. This points to a developing maturity in program evaluation and impact assessment.

4 out of 9 respondents

Track the number of new jobs created.

3 out of 9 respondents

Report that they are still developing their measurement framework.

3 out of 9 respondents

Also track the number of companies supported/funded or company survival rates.

Only
2 out of 9 respondents

Track patents filed or new products launched or the revenue growth of supported companies.

Only
1 out of 9 respondents

Track amount of private investment leveraged or number of young entrepreneurs prepared and introduced to the market or the position of Wrocław in the rankings or number of startups or announced investments.

This analysis shows that impact measurement varies. The fact that a third of institutions are still formalizing their KPIs suggests that the ecosystem is still maturing in its ability to uniformly and quantitatively demonstrate the return on public investment.

Stakeholder needs and future outlook

Respondents were asked to share about what new types of support or policy changes they believe are most needed to accelerate the ecosystem's growth. Following are exact quotes from some of the respondents in this regard.

Cooperation between research institutes and technology transfer policies

Introducing mechanisms that reward enterprise development and growth based on specific indicators and adopt other classification criteria. Some companies are created as startups to obtain various types of subsidies and conduct sham operations. This boils down to figuring out how to trick the ecosystem, rather than aiming to generate and sell value.

False growth trickery

Targeted support for innovative industries, including financial support for R&D.

Targeted growth

Public sector cooperation at various levels (city/regional/national) and synergy of activities resulting from a centrally prepared strategy.

Synergy, strategy, growth

Increased interest from city and regional authorities, soft-landing programs for startups from abroad, and an accelerator connecting all ecosystem players (universities, technology parks, city and regional authorities).

Global startup soft-landing

Tax incentives and a strategy that transcends divisions.

Tax incentives

The survey results accurately reflect the operational reality of local public support bodies: they are relationally focused, information-driven, and constrained by their own operational budgets. Their primary function is not to provide direct capital but to build the "ecosystem's connective tissue", helping entrepreneurs navigate a complex landscape. The perceived lack of local funding is not a system-wide failure but a feature of its specialization. The heavy financial lifting is handled at the national level, fueled by EU capital. The challenges and needs expressed by the survey respondents, such as the call for better-coordinated strategy and mechanisms to ensure genuine growth, should be interpreted as a desire for a more seamless and effective link between local ecosystem needs and the powerful financial instruments available at the national level.

Partner Showcase

Invest in Wroclaw

Invest in Wroclaw

Operating under the Wroclaw Agglomeration Development Agency (ARAW), Invest in Wroclaw is the primary gateway for businesses looking to establish themselves in the region.

Its "one-stop-shop" philosophy simplifies market entry, guiding companies through everything from legal and real estate matters to talent recruitment. Core services include:

- **Investor support:** comprehensive assistance for companies planning investments in the region, including advice on location selection, administrative procedures, and regulations for obtaining grants and tax relief. Support within the one-stop-shop formula, project support at all stages of implementation and functioning within the framework of post-investment care.
- **Promotion of investment in the region:** an active presentation of Wrocław and the Wrocław Agglomeration as an attractive location for investments from various sectors, with particular emphasis on modern technologies, R&D, industry, modern business services, and electromobility.
- **Market analyses and reports:** preparing data, analyses, and forecasts concerning the labor market, industrial sector, and investment potential of the region.
- **Organization of events and economic missions:** participation in and organization of conferences, trade fairs, economic missions, and business meetings aimed at promoting the region, supporting the local ecosystem in establishing business relationships, and presenting the local socio-economic potential.
- **Integration of the economic ecosystem:** organization of thematic events as part of the "Invest in Wroclaw" project, aimed at bringing together all stakeholders in the ecosystem.
- **PR and branding:** supporting new investors in establishing their project in the local community and presenting their new brand through PR and branding support.

Website:

Regional Development Agency “ARLEG” S.A.

ARLEG S.A. is dedicated to strengthening the competitiveness of the Legnica subregion, ensuring balanced growth across Lower Silesia.

With offices in Legnica and Głogów, it provides tailored support to local enterprises, preventing an over-concentration of economic activity in the capital. It has three core services:

- **Business incubator:** Offers modern office space and conference rooms for rent for startups and SME's in attractive locations in the centre of Legnica.
- **Innovation accelerator:** We operate a seed capital fund investing in innovative business ideas in the early stages of their development.
- **Loans and grants:** We provide low-interest loans for SMEs, start-ups and grants for improving qualifications and competences of local entrepreneurs and employees.

Website:

Lower Silesian Development Fund (DFR)

Established in 2012 and wholly owned by the regional government, the DFR is a specialized financial institution tasked with providing sustainable, long-term financing for the region's SMEs.

It operates on a revolving basis, where repaid capital from loans is reinvested into new projects, ensuring the system's permanence. Core services include:

- **Debt and equity financing:** Offers a wide spectrum of financial instruments, from working capital loans and investment loans to guarantees that make SMEs more attractive to commercial banks.
- **Venture capital:** Through its subsidiary, DFR Inwestycyjny (DFRI), it provides "smart money" to innovative, high-growth startups, offering not just equity financing but also crucial managerial and strategic support.

This catalytic role helps de-risk early-stage ventures, attracting further private investment and maturing the regional funding ecosystem.

Website:

INVEST PARK

WAŁBRZYCH SPECIAL ECONOMIC ZONE

Wałbrzych Special Economic Zone "INVEST-PARK" – a zone for good investments!

SUMMARY OF INVEST PARK

over
25 years
of activity on the market

400 investors
who have invested a total of over PLN 43 billion

And benefited from CIT/PIT tax reliefs worth approximately
7 billion PLN

Operating in 3 provinces: Lower Silesia, Opole, and Greater Poland – a total of
174 municipalities

WSSE INVEST-PARK offers comprehensive support at every stage of the investment. We represent the interests of our investors in government institutions, ministries, local government units, and business environment institutions.

In addition to attractive tax breaks, our partners receive real support in developing their businesses. We help the largest investors obtain government grants.

We offer comprehensive support to entrepreneurs so that they can implement their business plans:

- Tax breaks reducing income tax from 15% to 60% of the value of investment outlays for up to 15 years. These are real benefits for investors in our zone, who can allocate the saved funds to further development of their companies.
- The best investment plots located in the heart of Europe, with modern infrastructure providing access to major transport routes – motorways, expressways, and railways. This is an excellent opportunity to develop your business in a place that supports growth and success.
- Production and storage halls for rent and sale. Possibility to rent the entire facility or individual modules. Great locations close to national roads and logistics centers.

Tell us about your planned investment and we will help you with the investment process.

Feel free to contact us:

We connect startups with entrepreneurs to jointly implement modern technologies and accelerate development.

InvestUp

YOUR BRIDGE TO INNOVATION AND BUSINESS COOPERATION

InvestUp is a program created by the Wałbrzych Special Economic Zone "INVEST-PARK," whose goal is to connect companies with solutions that truly meet their needs.

We analyze specific business challenges and connect entrepreneurs with startups ready for real implementation. We create a space for cooperation where practical, measurable innovations are born.

Our slogan, "We connect startups with business," translates into real actions aimed at combining two elements—startups and companies—which together will create an ecosystem for the development of a product or service.

> **The biggest barrier for startups is not the idea, but the lack of access to an environment where that idea could mature. That is why the idea of InvestUp was born – a place that gives you the opportunity to see what really works – and in an environment of experienced companies such as Umicore, 3M, and Volkswagen.**
>
> *Anna Sawkiewicz, InvestUp project coordinator*

The benefits for startups include:

- Access to business partners and first customers.
- The opportunity to work on solutions in a real business environment.
- The option of rapid growth through collaboration with investors and entrepreneurs.

The benefits for entrepreneurs include:

- Gaining an advantage through quick access to proven, innovative solutions.
- Reducing implementation time and costs.

> **On one side, a startup; on the other, Toyota's production line. At InvestUp, these two worlds not only meet, but also begin to cooperate. For entrepreneurs, this means business development through innovation and access to innovative solutions without having to create them from scratch.**
>
> *Anna Sawkiewicz, InvestUp project coordinator*

- Obtaining specific technologies tailored to current challenges.

By joining InvestUp, you gain:

- Implementation of technologies that increase efficiency.
- Access to a proven network of startups and experts.
- Increased business value thanks to new development opportunities.
- Promotion of program participants at the regional and national level.
- Support from the InvestUp team at every stage of cooperation.

Do you want to introduce innovation to your company or scale your startup in a real environment? Scan the QR code and fill out a short form. We will contact you and help you choose the perfect business partner.

Contact us:

Our ecosystem is booming and has a strategy envisioning 2050

Anna Mazurek

HEAD OF COMMUNITY

Startup Poland

I have been observing the development of the Polish startup ecosystem for years, and I must admit: Lower Silesia is not only keeping pace, but at times even overtaking the peloton! Wrocław and its surroundings are a place where startups are not afraid of innovation, and successes are not a matter of chance, but the result of a wise strategy and a strong community. What particularly captivates me? It is something that cannot be put into Excel – local patriotism mixed with global ambition. Here, even after conquering foreign markets, companies proudly recall their Lower Silesian roots, as if every MVP was created in Nadodrze over coffee from a backyard roastery. But enthusiasm alone is not enough.

Behind this energy is the Startup Wroclaw team, which works as efficiently as if it had hackathons instead of Monday meetings. Paulina Muszyńska, Krystyna Kardacz, Maciek Jacenik and Marta Piksa, not only do they know the ecosystem inside out, but they can also heat it up to red hot. Their initiatives are not just ordinary meetings, they are catalysts for relationships, ideas and partnerships.

The Lower Silesian ecosystem is not just about funds and technologies. It is also a community where founders, investors, local government officials and innovators actually know each other, listen to each other and support each other. This synergy makes Lower Silesia deserve the title of a startup laboratory of success.

Congratulations to the entire Lower Silesian startup community, you are not only doing it well, you are doing it with heart and imagination!

Keep it up!

Startup Poland, together with Syrena Legal, is launching a project to standardise the venture capital market in Poland. Its core is a free, open-access database of practical documents addressing the lack of a common language between VC funds, founders and business angels. Unlike traditional legal initiatives, this project is co-created by practitioners, with lawyers moderating and ensuring usability. The first results include a standard termsheet, a convertible loan agreement, guides for founders and a code of ethical investing. The goal is simple: easier fundraising, clearer rules and stronger relationships across the startup ecosystem.

Download whatever you want.
As many times as you want. For free.

Marzena Horak

CITY STRATEGY OFFICE DIRECTOR

Municipality of Wrocław

In the new Wrocław Development Strategy "Wrocław 2050," startups are no longer just an interesting business phenomenon, they are becoming part of the city's identity and its future. They have been directly incorporated into the vision of Wrocław as a blue-green metropolis of future competencies. This is a clear signal that we treat the development of technological entrepreneurship and innovation as a strategic direction that contributes to the city's competitiveness and resilience in Europe.

Wrocław 2050 is also a city of talent. The strategy clearly focuses on developing the skills of the future, digital, technological, and social—and on close cooperation between science and business. Wrocław is a space for lifelong learning – from students to experienced professionals and economically active seniors. These diverse resources of knowledge and experience form the foundation of the city's innovation, thanks to which startups can count not only on inspiring founders, but also on access to teams, partners, and innovative infrastructure.

An important part of this vision is a blue-green metropolis. Wrocław is developing in such a way that every resident has access to nature within a few minutes' walk. A sustainable city, located on the river and full of parks, is becoming an attractive place not only to live, but also to work and invest. Startups are emerging and growing faster where quality of life goes hand in hand with a modern economy. Wrocław shows that innovation is best born in an environment conducive to health, creativity, and cooperation.

It is also an open and diverse city. A city of encounters, as it is traditionally described, it is a place where diversity and inclusiveness are written into its DNA. The presence of an international community, tolerance, and solidarity mean that new ideas find a natural space to develop here. For startups, this means an environment where it is easy to create international teams, combine experiences, and look at business globally from day one.

Wrocław is building its future within a network of European and global connections. The city is investing in digital infrastructure and participating in international research and development projects, creating natural conditions for startups thinking about expansion. It is a place where a local idea can quickly become part of global innovation. Wrocław 2050 is a city that combines the ambitions of entrepreneurs with the opportunities of the global economy.

Finally, the strategy emphasizes the importance of quality of life, because innovation does not develop in a vacuum. It needs an environment where people want to live, work, and create. Wrocław offers its residents a rich cultural life, access to green spaces, good housing conditions, and public transport. All this makes the city attractive to talented people and investors who are looking not only for a market but also for quality of life. Wrocław inspires startups and provides everyday comfort.

Wrocław is a city that is consistently building its identity as a blue-green metropolis – people-friendly, open to diversity, and ready for the challenges of the future. Innovation is born in an environment where different perspectives, experiences, and cultures come together – and this is precisely what the social fabric of Wrocław is like.

The "Wrocław 2050" strategy assumes that the city's economic development cannot be separated from quality of life and concern for the climate. Startups that decide to invest in Wrocław gain not only access to talent, universities, and infrastructure, but also to an inspiring, green, and diverse environment that fosters creativity and the development of innovative business models.

Horizontal dimensions of the strategy:

1. Climate-neutral and blue-green Wrocław
2. Bluee-gren Wrocław
3. Smart technologies for the residents of Wrocław
4. High culture of cooperation
5. Metropolitan position of Wrocław

Aspiring entrepreneurs in Lower Silesia

This section discusses the profile of Aspiring Entrepreneurs within the Lower Silesian startup ecosystem. The analysis is based on data gathered from the Startup Wroclaw survey, which saw participation from 54 Aspiring Entrepreneurs, of which, 26 completed the survey in its entirety, while 28 provided partial responses, all of which contribute to the insights presented here. To understand who the aspiring entrepreneurs of Lower Silesia are, we first look at their current professional activities and fields of expertise. The data, presented in Figure 10.a., reveals that the path to entrepreneurship in Lower Silesia is not uniform but rather draws from a diverse pool of talent and experience. A significant portion of respondents are already experienced business owners running non-startup enterprises, suggesting a desire to pivot towards more scalable, innovation-driven models. Another large group consists of full-time employees, who are likely developing their startup concepts alongside their day jobs, indicating a high level of motivation and careful risk management. The strong presence of university students highlights the crucial role of local academic institutions as incubators for future talent, particularly in scientific and technical fields. This blend of seasoned business professionals, dedicated employees, and bright academic minds creates a rich and dynamic foundation for the ecosystem.

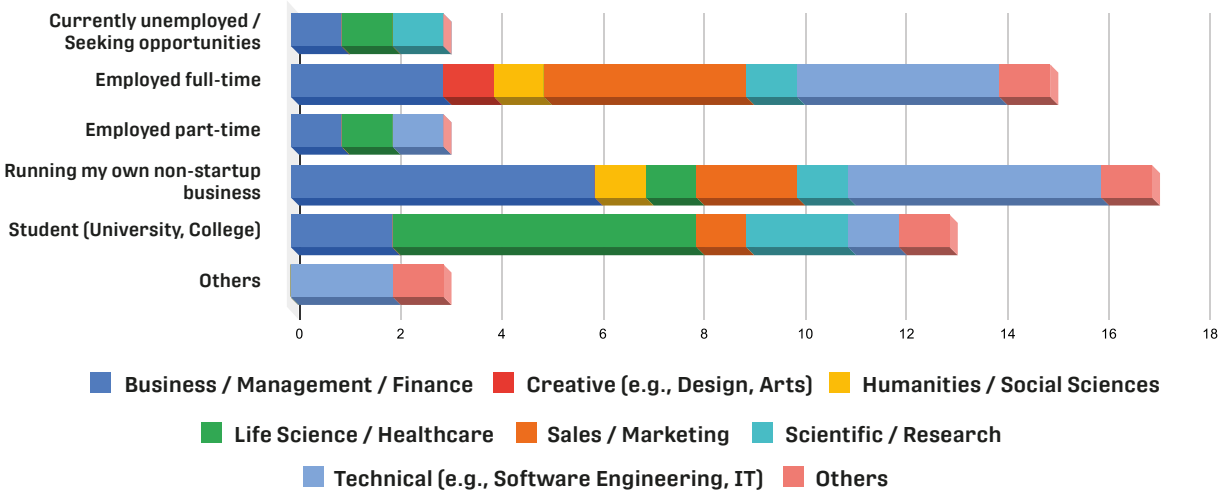


Figure 10.a. Primary activity and professional background of aspiring entrepreneurs in Lower Silesia (N=54, survey data)

The idea stage

The results in Figure 10.b. reveal two key trends for the ecosystem. Firstly, while over half of respondents have a specific idea, the largest single group has not yet started working on it, highlighting a critical "activation gap" where support can make a difference. Secondly, a substantial number of individuals are entrepreneurial but are still searching for the right concept, pointing to a clear opportunity for initiatives that foster ideation and co-founder matchmaking.

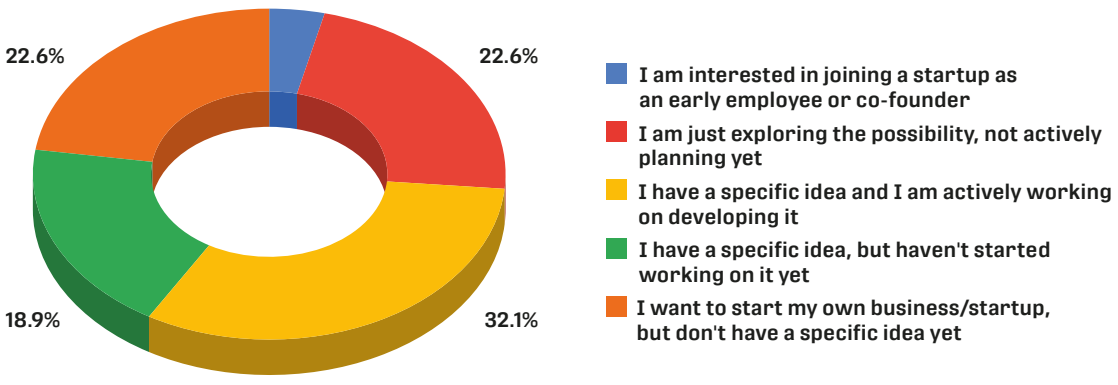


Figure 10.b.Aspiring entrepreneurs' progress in developing a startup idea (N=48, survey data)

Anatomy of Aspiring Entrepreneurs' ideas

For the aspiring entrepreneurs who have already identified a specific business concept, we further analyzed the nature of their ideas and their current stage of development. As shown in Table 10.a., the ideas are in their infancy. The primary focus is on product development, with the most common stage being the creation of an initial prototype or MVP plan, followed closely by the initial brainstorming phase. Business-centric tasks like developing a formal business plan or actively seeking co-founders are less common at this point. The ideas span a wide array of industries, from AI and Fintech to E-commerce and Gamedev, reflecting a diverse technological landscape. Notably, there appears to be an emerging cluster of activity in the life sciences and health sectors, with several ventures in Medtech/Healthtech, Veterinary, and Biotechnology, suggesting a potential area of specialization for the Lower Silesian ecosystem

Table 10.a. Aspiring entrepreneurs' stage of the startup idea by primary sector (N=26, survey data)

Primary sector of Aspiring Entrepreneur's idea	Startup Idea Stage					
	Actively seeking co-fo-unders / team members	Building an initial prototy-pe / MVP plan	Developing a basic business plan / model	Just an initial concept / Brainstorming phase	Market rese-arch / Idea vali-dation phase	Unsure
AI / Machine Learning	0	1	0	0	1	0
AR / VR	0	1	0	0	0	0
Biotechnology	0	0	0	2	0	0
Cloud Services	0	0	0	1	0	0
DeepTech	0	1	0	0	0	0
E-commerce	0	0	0	1	0	0
EduTech	1	0	0	0	0	0
Entertainment / Media	0	0	0	0	1	0
Fintech / Insurtech	0	1	0	0	0	0
FoodTech	0	1	0	1	0	0
Gamedev	0	0	0	1	0	0
Medtech / Healthtech	0	2	0	0	0	0
PropTech	0	0	0	0	1	0
Raw Material Industry	0	0	0	1	0	0
Software	0	0	0	0	1	0
Telecommuni-cation	0	0	1	0	0	0
Veterinary	0	2	0	0	0	0
analytics / BI	0	0	1	0	0	0
Others	1	0	0	1	0	1

From idea to action

What separates an idea from a business is action. To understand this transition, we examined the immediate next steps planned by founders, comparing those who are actively working on their idea against those who have not yet started. Figure 10.c. illustrates the difference in focus. For those who have not yet begun, the journey is still in the conceptual phase, with efforts centered on brainstorming. In stark contrast, those actively developing their idea are overwhelmingly concentrated on building an initial prototype or MVP. This highlights a key challenge for the ecosystem: helping founders bridge the gap from abstract brainstorming to tangible product development.

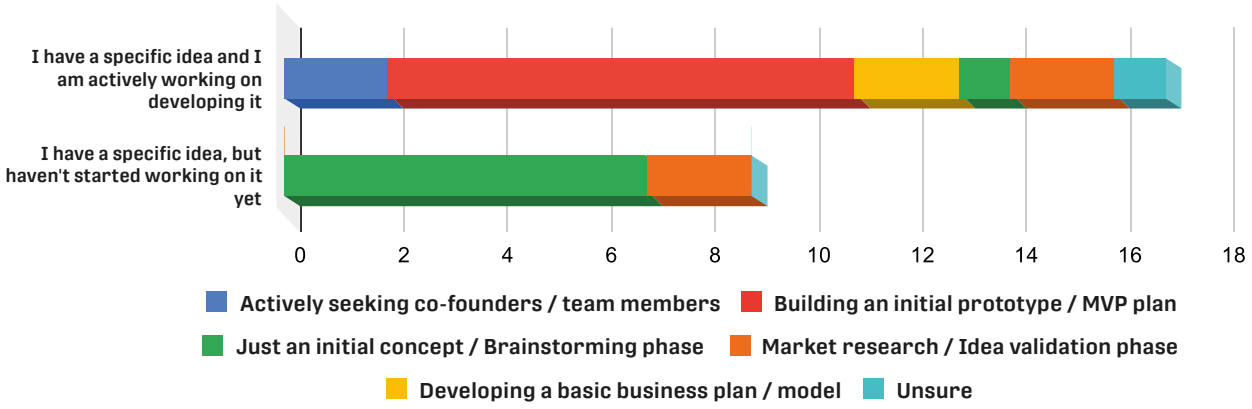


Figure 10.c. Next steps based on whether the founder has started working on their idea (N=26, survey data)

Beyond building, validating the idea is a critical step. The data in Table 10.b. shows a significant behavioral divide in how these two groups approach validation. Founders who are actively working are proactive in de-risking their concepts; they are talking to potential customers, pitching to mentors for feedback, and conducting market research. Conversely, those who haven't started are largely limiting their validation to passive online research, with none having yet interviewed potential customers. This indicates a need for programs that teach and encourage hands-on, customer-centric validation methods to help early-stage founders confirm their ideas have real market potential before they start building.

Table 10.b. Steps taken to validate a startup idea (N=25, survey data)

Steps have you taken to validate the idea	I have a specific idea and I am actively working on developing it	I have a specific idea, but have not started working on it yet
Conducted online research on the market and competitors	8	4
Interviewed potential customers about their problems and needs	9	0
Created a mock-up, landing page, or prototype to gauge interest	4	0
Calculated a basic business case or market size estimate	6	0
Pitched the idea to experienced mentors or entrepreneurs for feedback	8	1
I have not taken any specific validation steps yet	3	3

The search for co-founders and team members

A successful startup is rarely the work of one person, as highlighted by Dr. Scheffer in earlier part of the report. The right co-founding team provides complementary skills, resilience, and momentum. We asked aspiring entrepreneurs about their current team situation and what kind of support they are looking for.

The data in Figure 10.d. reveals that the majority of aspiring founders in Lower Silesia are currently working on their idea alone. For these solo entrepreneurs, there is a clear and pressing need for partners with specific skill sets. The most sought-after collaborators are co-founders with strong business skills in areas like sales, marketing, and finance, followed closely by those with a strong technical background such as software development. Interestingly, a large number of solo founders are not actively looking for anyone at the moment, which may suggest that their ideas are still in a very early, confidential phase.

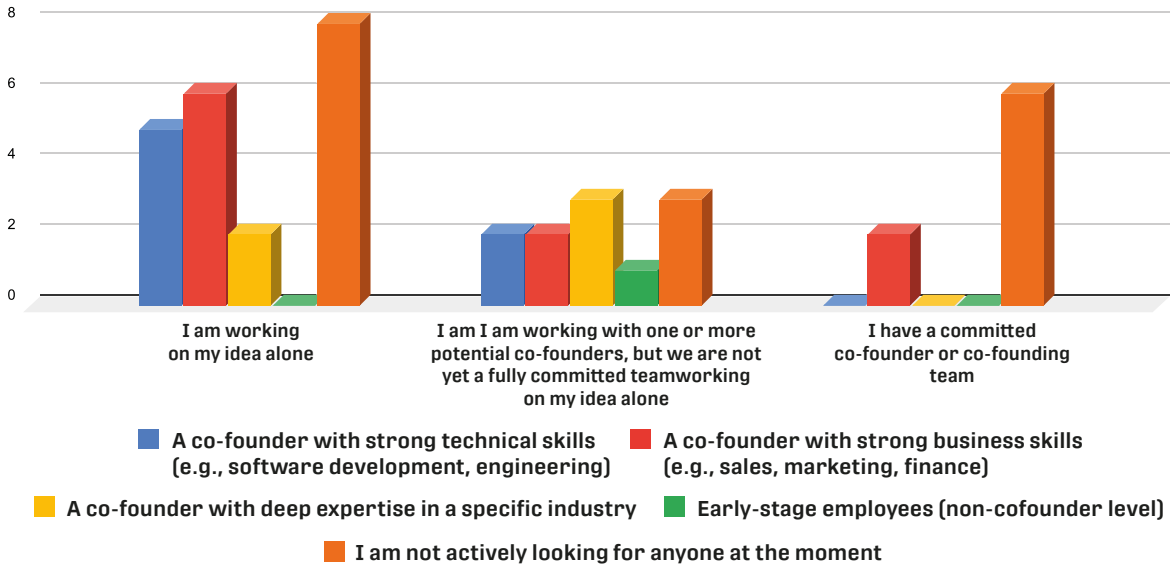


Figure 10.d. Current team status and team member needs of aspiring entrepreneurs (N=40)

Awareness and use of local startup support

Analysis of how aspiring founders use local resources, reveals a significant awareness gap. Many entrepreneurs have not used any support simply because they are unaware of what is available. The data in Table 10.c. shows that engagement is highest with accessible activities like networking events and online webinars, while more intensive programs see much lower participation. This highlights a clear need for support organizations to increase their visibility and better communicate their value to this early-stage audience.

Table 10.c. Awareness and utilization of ecosystem support resources by aspiring entrepreneurs (N=37, survey data)

Utilized any support?	Aware of ecosystem resources and support?		
	No, I am not really aware of what support is available	Yes, I am well aware of the available resources	Yes, I know some resources but could know more
Academic Incubator program	0	1	1
Startup Weekend or similar idea hackathon	0	1	1
Pre-acceleration program	0	1	0
Mentoring program specifically for idea-stage founders	2	1	1
Online entrepreneurship courses / webinars	1	1	4
Startup networking events	2	2	5
University entrepreneurship center resources	1	1	2
None yet	12	2	8

Challenges faced by Aspiring Entrepreneurs

Every entrepreneurial path has its challenges. To better understand emerging startups, we asked aspiring entrepreneurs about the most significant challenges they face on their journey. The responses, detailed in Table 10.d, reveal two dominant hurdles that transcend all stages of development: a lack of personal funds or access to initial capital, and not enough time due to current jobs or studies. Funding is a particularly critical barrier for those who have an idea but have not yet started, suggesting it is a primary factor preventing them from taking the first step. For those already actively building their venture, time constraints become the most pressing issue. Other notable challenges include the fear of failure, especially for those in the earliest exploratory phases, and difficulties navigating legal and administrative requirements as their ideas become more concrete.

Table 10.d. Top challenges faced by aspiring entrepreneurs based on their current situation (N=36, survey data)

Challenges Faced	Aspiring entrepreneur's current situation				
	I am interested in joining a startup as an early employee or co-founder	I am just exploring the possibility, not actively planning yet	I have a specific idea and I am actively working on developing it	I have a specific idea, but have not started working on it yet	I want to start my own business/ startup, but do not have a specific idea yet
Fear of failure / Risk aversion	0	3	2	3	1
Lack of a validated business idea	0	1	1	2	1
Difficulty finding co-founders / the right team	1	1	2	0	2
Lack of personal funds / Access to initial capital	2	1	5	6	4
Lack of specific business knowledge (e.g., finance, marketing)	1	0	3	1	2
Not enough time due to current job/studies	0	0	7	3	4
Uncertainty about the market / competition	0	1	3	1	1
Lack of technical skills (if relevant)	0	1	0	1	1
Navigating legal/ administrative requirements	1	2	4	1	1
Lack of mentorship / guidance	0	2	3	2	0

Bright spots of inspiration in the ecosystem

Despite the challenges, aspiring entrepreneurs find significant motivation within the Lower Silesian startup scene. We asked what aspects of the local ecosystem they find most inspiring. As shown in Figure 10.e., the strongest drivers of inspiration are the ecosystem's "soft" assets. Founders are most energized by the collaborative spirit and active community, the general enthusiasm and optimism in the scene, and the opportunities for international cooperation. The deep pool of local talent is also seen as a major strength. However, there is a telling disconnect between what inspires founders and the challenges they face. While the community is highly valued, the "pioneering innovation and R&D focus" is one of the least inspiring aspects of the ecosystem. Among those working actively to develop their idea, one of the lowest rated motivations was ease to connect with investors and securing capital. This directly reinforces the earlier finding that access to funding is the number one challenge, highlighting a critical area for improvement.

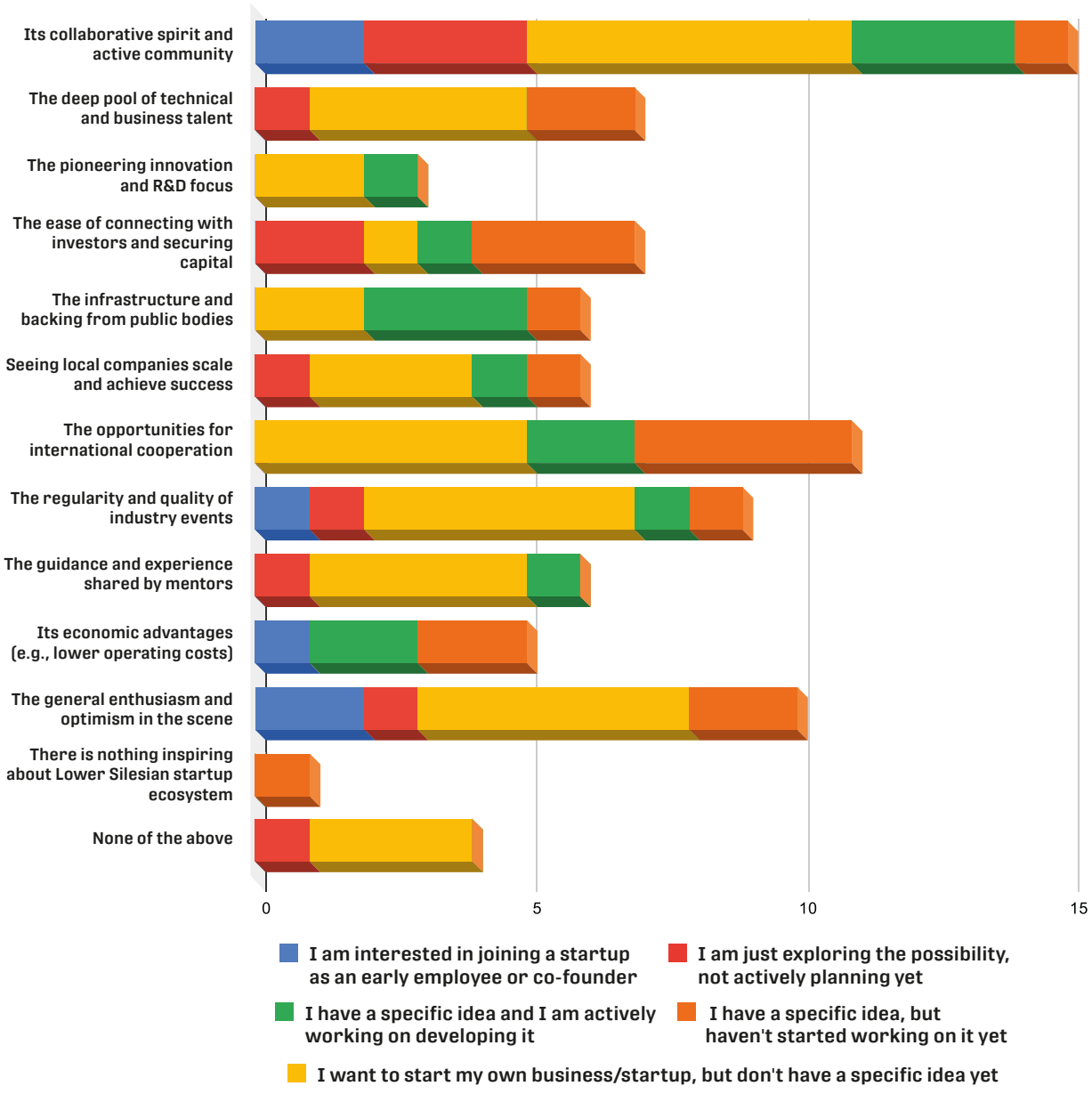


Figure 10.e. The most inspiring aspects of the Lower Silesian startup ecosystem according to aspiring entrepreneurs (N=32, survey data)

What Aspiring Entrepreneurs need the most

To create an effective support system, it is crucial to understand what aspiring entrepreneurs are actively looking for. We asked them to identify the types of assistance that would be most valuable for their journey. The responses in Table 10.e. show the practical, tangible needs. The most sought-after forms of support are focused on gaining knowledge and resources. There is a demand for access to expertise, both through mentorship from experienced entrepreneurs and market insights from industry experts. This is closely followed by a need for early-stage capital, specifically in the form of grants for prototyping. These top requests are consistent across different situations Aspiring Entrepreneurs are in, providing a clear roadmap for ecosystem support organizations to focus on facilitating connections and providing accessible micro-funding.

Table 10.e. The most sought-after support by aspiring entrepreneurs (N=34, survey data)

Aspiring entrepreneurs are looking for...	Aspiring entrepreneur's current situation				
	I am interested in joining a startup as an early employee or co-founder	I am just exploring the possibility, not actively planning yet	I have a specific idea and I am actively working on developing it	I have a specific idea, but haven't started working on it yet	I want to start my own business/ startup, but don't have a specific idea yet
Mentorship from experienced entrepreneurs	1	3	6	4	1
Workshops on business model development / validation	1	0	2	2	2
Access to grants for prototyping	1	2	6	3	2
Networking events to find co-founders or partners	0	1	2	2	2
Guidance on legal setup and administration	2	2	2	1	2
Access to industry experts for market insights	0	1	5	7	3
Training on pitching and presenting ideas	0	1	1	0	0
Co-working space access	0	1	0	0	1
Inspiration / Success stories from local founders	0	1	1	0	1
Structured idea--stage / pre-acceleration program	1	0	3	1	2

Aspiring Entrepreneurs' initial investment ask

To further understand the primary challenge of funding, we asked Aspiring Entrepreneurs how much initial investment they are seeking to get their ventures off the ground. The results, shown in Figure 10.f., may be surprising. The single largest group of aspiring entrepreneurs, nearly a third of respondents, is not seeking any initial investment, indicating a strong focus on bootstrapping in the earliest stages. For those who do require capital, the needs are concentrated in the pre-seed or micro-grant range. The most common request is for small amounts around €10,000, with other significant clusters around €50,000 and €100,000. This confirms that the primary financial need is for small, targeted funds to build an MVP and validate an idea, rather than large, traditional venture capital rounds.

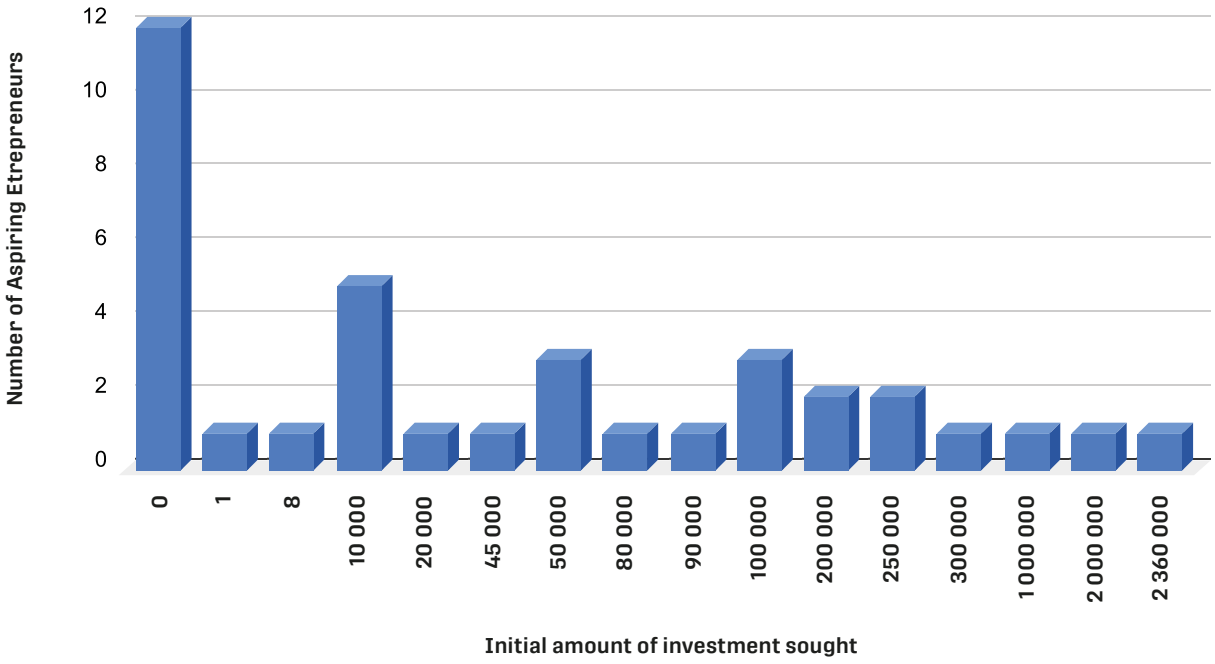


Figure 10.f. Initial investment amount sought by aspiring entrepreneurs (N=37, survey data)

Willingness to invest personal savings

Beyond seeking external capital, an entrepreneur's willingness to invest their own money is a powerful indicator of their commitment and belief in their venture. We asked Aspiring Entrepreneurs how much of their personal savings they were prepared to invest. The results in Table 10.f. show a very strong personal commitment. The vast majority are willing to put their own capital on the line, with the largest single group prepared to invest more than €10,000. This supports the earlier finding that initially many are not seeking external funds; this data suggests that bootstrapping is often fueled by significant personal investment. This high level of "skin in the game" demonstrates a deep-seated belief in their ideas and a seriousness that is a positive signal for the entire ecosystem.

Table 10.f. Personal savings aspiring entrepreneurs are willing to invest in their startup (N=37, survey data)

Aspiring entrepreneurs' personal savings to invest.	No. of aspiring entrepreneurs
€0	1
€1,001 - €5,000	8
€5,001 - €10,000	3
I prefer not to say	6
More than €10,000	11
Up to €1,000	8

Wrocław and Lower Silesia: 2026 and beyond

A strategic outlook and summary

An ecosystem at a crossroads

Wrocław and Lower Silesian startup ecosystem is a regional leader in Poland, characterized by a vibrant community, a deep well of technical talent, and a surge in entrepreneurial activity.

With a positive stakeholder perception (overall score of 6.86/10) and a healthy Net Promoter Score of +27.28, the foundations are strong. However, the ecosystem is at a critical inflection point. It has successfully mastered the art of community building and idea generation but now faces the crucial challenge of transforming this potential into a sustainable, globally competitive market that creates and retains high-growth companies. The next three to five years will be defined by the region's ability to bridge the gap between producing technology and building scalable businesses around it.

THE CORE ASSETS

A world-class talent engine

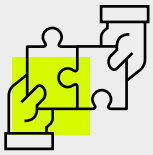
The ecosystem's universally recognized #1 strength is its strong pool of technical talent. With over 117,600 students and 29,300 graduates annually from 30 institutions, the region is a proven factory for the skilled engineers and specialists who form the bedrock of any tech hub. Universities like Wrocław University of Science and Technology are a dominant source of founders and spinouts.

Vibrant community and good quality of life

The active, supportive, and collaborative startup community is the ecosystem's second important asset. This is amplified by Wrocław's good quality of life, which has the potential to be groomed into a magnet for outside talent. The city is celebrated for its green spaces, rich culture, multiculturalism (home to 119 nationalities), and affordability compared to other European hubs.

Strategic and economic powerhouse

Positioned at the crossroads of Europe with direct borders to Germany and Czechia, the region is the 4th largest regional economy in Poland. This provides startups with a significant domestic market, lower operational costs than Western hubs, and superior connectivity for international expansion.

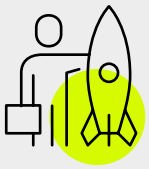


Robust early-stage support

The ecosystem excels at nurturing ideas. A dense network of incubators, accelerators, and over 550 annual events provides a fertile ground for aspiring entrepreneurs. All surveyed *Support Organizations* cater to idea-stage founders, ensuring *Aspiring Entrepreneurs* get ample support to get their venture going.

THE CRITICAL GAPS

Wrocław and Lower Silesian startup ecosystem has strong assets, nevertheless the report clearly identifies four structural gaps that must be addressed to unlock the ecosystem's full potential. Closing these gaps should be the central focus of the region's strategy.



The commercialization gap

The ecosystem excels at building products but struggles to build businesses.

- *Startups* identify their biggest challenge as customer acquisition and sales, and seek to improve skills in sales and marketing.
- *Investors* cite a lack of market validation and clear business models as top startup weaknesses.
- *Support Organizations* name "go-to-market strategy" as the #1 skill gap they observe in founders.

The scale-up funding gap

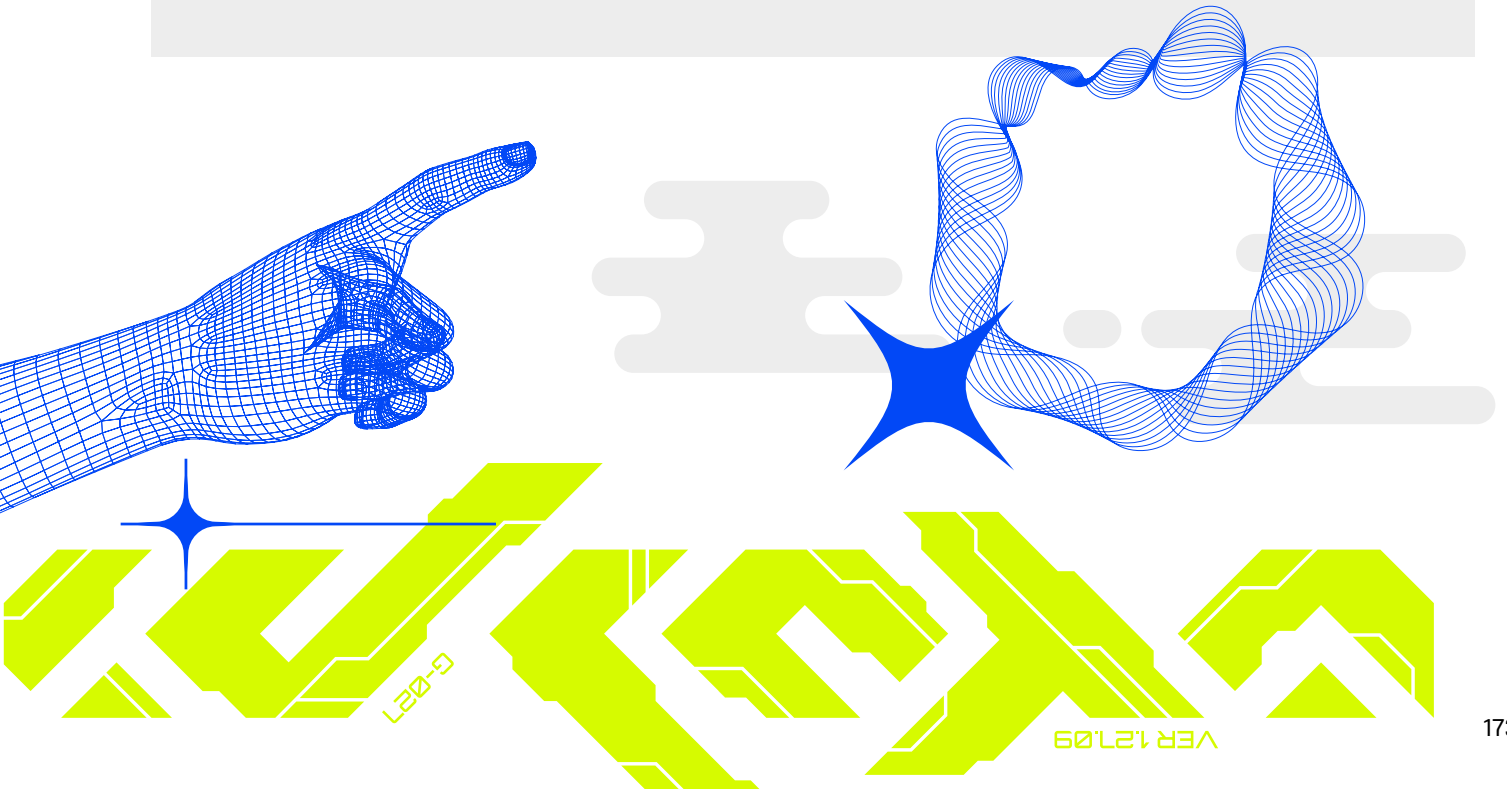
- There is a "capital crowd" at the pre-seed/seed stage, with 83% of Investors focused here. However, a severe "Series A+ funding gap," with very few local investors able to lead growth-stage rounds. This is the ecosystem's single greatest risk, forcing its most promising companies to seek capital elsewhere, and causing them to move out to the ecosystem to the west.

The academia-industry gap

- Despite being the primary source of talent, academic institutions feel "Poorly aligned" or "Neutral" regarding the startup ecosystem. They are hindered by a lack of proof-of-concept funding, insufficient business skills among researchers, and weak connections to investors. They need support in "translating" their research for the business community.

The corporate integration gap

- Startups are very open to corporate collaboration. Corporations are engaged but are primarily blocked by their own "complex internal processes" and a "lack of dedicated internal resources". Better matchmaking platforms and industry-specific events are needed to bridge this divide.



Key trends and opportunities

The analysis pinpoints four powerful trends that are shaping the ecosystem. Understanding and strategically responding to these trends is essential for accelerating our maturity and aligning our growth with broader European and national policy objectives.

TREND 1: THE ASCENDANCY OF DEEP TECH AND DEFENSIBLE IP

What it is

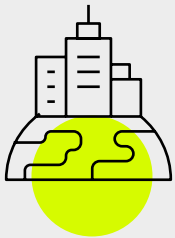
The ecosystem's center of gravity is shifting from software-as-a-service to ventures built on foundational science, proprietary engineering, and protected intellectual property. This is validated by multiple data points:

- Investor focus: "Deep Tech," "AI/ Machine Learning," and "Industry 4.0" are among the top investment sectors.
- Startup advantage: "Proprietary technology / IP" is the most cited competitive advantage for early-stage companies.
- Academic engine: Wrocław University of Science and Technology is the primary source of the ecosystem's direct technology spinouts.

Alignment with strategic policy

This trend perfectly aligns with the European Innovation Council's (EIC) strategic conviction. As stated by Dr. Michiel Scheffer, the EIC is "really deep tech oriented," defining it as innovation proven by a "fully granted patent". This focus also directly supports the EU's goal of achieving "strategic autonomy" in foundational technologies, as outlined in the Digital Europe Programme.

The opportunity



This trend presents the opportunity for Wrocław and Lower Silesia to transition from being a generalist tech hub to a specialized, high-value center of excellence for Deep Tech. Instead of competing with every other European city on software development, the region can build a defensible global brand as the place to create and fund ventures rooted in hard science and engineering. This attracts a more sophisticated class of international investors, specialized corporate partners, and world-class scientific talent, allowing the ecosystem to move up the global value chain and capture a premium for its innovation.

TREND 2: THE IMPERATIVE PIVOT FROM PRODUCT-CENTRIC TO MARKET-CENTRIC

What it is

The ecosystem is confronting the reality that a superior product is not enough. The "Commercialization Gap" is the most consistent theme in this report, identified by all major stakeholders.

- **Founder needs:** The top areas founders seek to improve are "Advanced Sales Techniques" and "Digital Marketing."
- **Hiring challenges:** The single most difficult role for startups to fill is "Sales and Business Development professionals."
- **Investor feedback:** The most common weaknesses in pitches are "insufficient market validation" and "unrealistic valuations."

Alignment with strategic policy

This challenge is directly addressed by national support mechanisms. PARP's "Startup Booster Poland" program, with its "Go Global" track, is designed to provide the exact commercialization support and internationalization strategy that local founders are asking for.

The opportunity

Solving the commercialization gap unlocks the opportunity to dramatically increase the ecosystem's overall economic efficiency and "hit rate". For every ten startups founded, improving their go-to-market capabilities could mean the difference between one and three succeeding. This is not just about helping individual companies; it is about maximizing the return on the region's immense investment in talent and R&D. A reputation for commercial excellence would make Lower Silesian startups more attractive to international investors, who are ultimately backing businesses, not just technologies. This shift would translate directly into higher valuations, faster growth, more high-value jobs, and greater retained wealth within the region.

DISCUSSION POINT: THE INNOVATOR'S DILEMMA: FROM DEEP TECH TO MARKET SUCCESS

The ecosystem's strategic shift towards Deep Tech and defensible IP (Trend 1) is a sign of maturity. However, this makes the Commercialization Gap (Trend 2) even more critical to solve. Selling complex, foundational technology is a fundamentally different challenge than selling software. This reality prompts a deeper discussion:

- As our startups become more technically advanced, how must our support ecosystem evolve? Does a founder with a patented biotech innovation need the same go-to-market advice as a SaaS founder, or do they require specialized mentorship on navigating regulatory hurdles, long sales cycles, and building trust with enterprise clients?
- Is the traditional "hustler & hacker" founding team model sufficient for Deep Tech? The discussion must expand to include how we pair brilliant "scientist-founders" with experienced commercial leaders who can translate groundbreaking research into a compelling business case for investors.
- How do we prepare founders for the patience that Deep Tech requires? The ecosystem's narrative must celebrate not only rapid growth but also the resilience needed to guide a research-heavy product from the lab to a sustainable market position.

TREND 3: THE BIFURCATION OF THE FUNDING LANDSCAPE AND THE RISE OF SYNDICATION

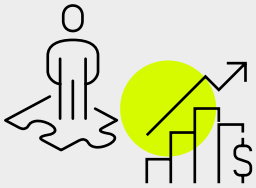
What it is

The regional investment scene is maturing into two distinct tiers. The pre-seed/seed stage is vibrant but crowded, leading to intense competition. This is immediately followed by the "Scale-Up Funding Gap" at Series A, a critical structural bottleneck forcing our best companies to seek capital, and often relocate, elsewhere.

Alignment with strategic policy

This dynamic mirrors the challenge identified by the EIC at a European level ("The scaling-up void") and is a key focus for national bodies. PFR Ventures was established precisely to stimulate the later-stage funding market. The growth of local angel networks like the Wroclaw Tech Business Angels Club (WTBAC) is the grassroots answer to this challenge.

The opportunity

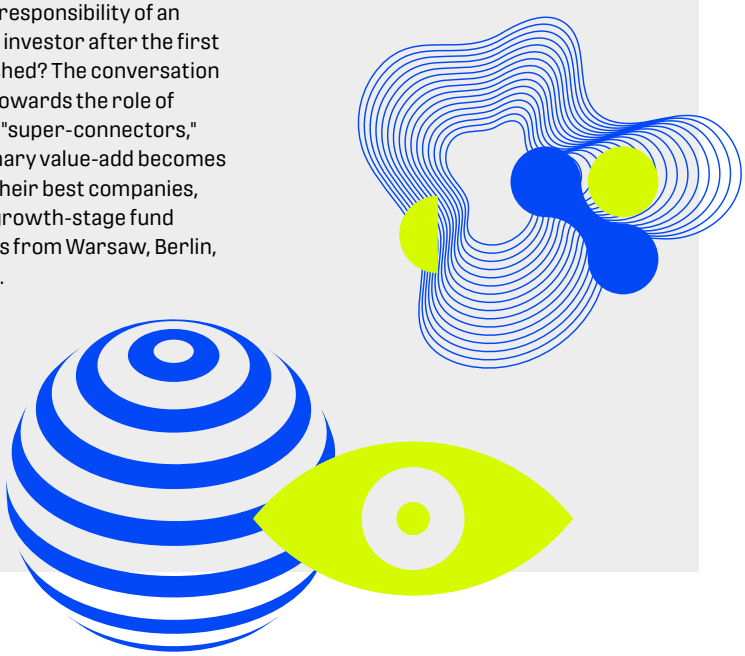


The funding gap presents a clear opportunity to build a sovereign and virtuous capital cycle within the ecosystem. By fostering local syndication and actively connecting our scale-ups with national and international growth funds, we not only solve an immediate funding need but also lay the groundwork for long-term self-sufficiency. When local companies achieve major exits fueled by locally-led or co-led rounds, a significant portion of that capital and, critically, the invaluable experience of the founders and early investors, flows back into the ecosystem. This creates a new generation of sophisticated local angel investors and mentors, kickstarting a powerful flywheel that reduces dependency on outside capital and builds lasting regional wealth.

DISCUSSION POINT: CULTIVATING A SOVEREIGN CAPITAL CYCLE

With a concentration of capital at the seed stage, the ecosystem's long-term value capture depends on solving the Series A gap. This presents a challenge and a strategic discussion for the local investment community:

- How can local seed funds and angel investors move from competing for deals to collaborating on them? The discussion should focus on creating formal "super-syndicates" capable of writing the larger, crucial first €1M+ checks.
- What is the responsibility of an early-stage investor after the first check is cashed? The conversation must shift towards the role of local VCs as "super-connectors," whose primary value-add becomes preparing their best companies, to attract, growth-stage fund investments from Warsaw, Berlin, and London.



TREND 4: THE UNTAPPED POTENTIAL OF "TRIPLE HELIX" INTEGRATION

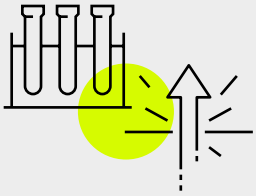
What it is

Three of the ecosystem's most powerful engines, Academia, Corporations, and Startups, operate in parallel but are not deeply integrated. The report reveals a strong mutual desire for collaboration hindered by structural and communication barriers. Academia feels disconnected, corporations are slowed by internal processes, and startups struggle to find the right entry points.

Alignment with strategic policy

Fostering these linkages is the core objective of the Lower Silesian Innovation Strategy (RIS3 2030), which emphasizes building a collaborative ecosystem around its designated "Smart Specialisations." The success of this regional strategy hinges on our ability to forge these connections.

The opportunity



This integration gap provides the opportunity to create unique, defensible innovation clusters that are globally competitive. By systematically connecting these three pillars around our RIS3 specialisations, we can tackle large-scale, complex challenges that no single actor could solve alone. Imagine a Medtech cluster where the Medical University provides clinical research, a startup develops an AI diagnostic tool, and a large corporation provides the manufacturing and distribution channels. Such integrated "Triple Helix" collaborations create a powerful competitive moat, generating innovation that is not easily replicated elsewhere. This is the path to moving beyond individual startup successes and building entire industry verticals where the region is a recognized world leader.

DISCUSSION POINT: THE NEED FOR AN ECOSYSTEM "TRANSLATOR"

The report shows that Academia, Corporations, and Startups are willing partners speaking different "languages." This suggests that the solution is not simply more networking events, but a more fundamental discussion about strategic orchestration:

- Who is best positioned to act as the ecosystem's chief "translator"? This role requires the credibility and expertise to understand academic research, corporate procurement cycles, and startup agility. Is this the natural role of a public-private entity like Startup Wrocław, or is a new platform needed?
- How do we shift the ecosystem from a model of "fortunate discovery" to one of "intentional matchmaking"? The discussion should explore creating permanent, trusted platforms where corporations can post their innovation needs and universities can showcase their commercial-ready IP in a standardized, business-friendly format.

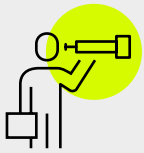
A unified strategy for 2026 and beyond

Addressing the identified gaps require a coordinated, multi-stakeholder effort. The following are actionable recommendations for each group, synthesized from the report's data and expert insights.

FOR STARTUPS AND ASPIRING ENTREPRENEURS

Master the business of tech

A strong focus is needed to closing the commercialization gap. To do so, prioritize learning advanced sales techniques, digital marketing, and international expansion strategy, as these are the most-needed skills identified by you, investors, and support organizations.



Validate before you build

The analysis shows a tendency to focus on building a prototype without first validating the idea with real customers. Get out of the building. Interview potential users and pitch to mentors before writing a single line of code.

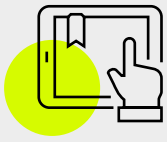
Think globally from day one

Take notice of the warning from experienced founders: building for the Polish market first is a trap that limits your company's horizons. Leverage the ecosystem's international outlook and strategically plan to build for global or European markets from the get go.

Build a complete team

A successful venture requires a blend of technical, business, and financial expertise. Most aspiring founders are seeking co-founders with strong business skills, make finding this partner a top priority.

FOR INVESTORS



Become the Bridge to Series A

The ecosystem's future depends on solving the scale-up funding gap. Syndicate with other local investors to write the first €1M+ checks. Act as super-connectors by proactively marketing your best portfolio companies to growth-stage funds in Warsaw, Berlin, and London.

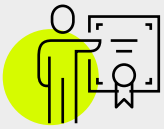
Invest in Commercialization

Smart capital is most effective, i.e. when investment is paired with hands-on support. The data is clear: founders need help with sales and go-to-market strategy. Offer operational support and access to your network to help your portfolio companies acquire their first major clients.

Engage with academia

Investors are perceived as the most disconnected group from the region's #1 asset—its universities. Proactively build relationships with technology transfer offices and research centers to gain early access to defensible, deep-tech IP.

FOR CORPORATIONS



Streamline to innovate

The biggest barrier to innovation in corporations is internal bureaucracy. Establish dedicated, agile teams or landing pads with simplified procurement processes to manage startup partnerships effectively.

Signal your needs

Answer the ecosystem's call for better direction. Participate in or host "reverse pitch" events where you present your key business challenges to attract targeted solutions from startups. This is one of the most desired enablers.

Become a scaling partner

Move beyond basic supplier relationships. Offer startups opportunities for pilot projects and proof-of-concepts, which is the most sought-after form of collaboration. This de-risks innovation for you and provides critical validation for them.

FOR ACADEMIA AND RESEARCH INSTITUTIONS

Build your bridge to business

You possess world-class research but feel disconnected. Act on this by creating a "valorization roundtable" where all local universities meet with industry and investors to share information and collaborate on commercializing research, as advised by the EIC.

Embed commercial curiosity

Entrepreneurship must become part of the academic culture. Implement compulsory interdisciplinary courses that bring together students from technology, business, and other faculties to develop business cases together.

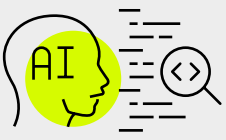
Simplify tech transfer

Your own data shows that complex IP policies are a barrier. Learn from the success of other European universities, such as ETH Zurich, EPFL Lausanne, Technical University of Denmark and others, who have mastered spinoff creation. The key is to create a more streamlined path from lab to market.

FOR PUBLIC SECTOR AND ECOSYSTEM SUPPORT NETWORK

Orchestrate and connect

Your core strength is not direct funding but acting as the ecosystem's "connective tissue". Double down on this role by creating platforms and events that directly address the identified gaps: connect scale-ups to Series A investors, connect academia to industry, and connect corporations to startups.



Brand the region for global impact

The ecosystem needs a stronger international brand. Based on investor feedback and startup activity, formally promote Wrocław and Lower Silesia as a European hub for AI, DeepTech, Medtech, and Gamedev. Showcase global success stories like CCC, Techland, Tensquare games, Text, Infermedica, Clone and SatRev to validate this claim on the world stage.

Target the awareness gap

Aspiring entrepreneurs are often unaware of available support. Launch targeted campaigns to promote existing resources, especially mentorship and pre-acceleration programs, to this crucial early-stage audience.

Methodology

This report provides a comprehensive, multi-faceted analysis of the Wrocław and Lower Silesian startup ecosystem. The research was designed to move beyond anecdotal evidence and create a data-driven, stakeholder-validated portrait of the region's innovation landscape. A mixed-methods approach was adopted, integrating primary quantitative and qualitative data collection with an extensive review of secondary data sources. This triangulation ensures a robust and nuanced understanding of the ecosystem's dynamics, strengths, and challenges.

RESEARCH DESIGN AND INSTRUMENT DEVELOPMENT

The study's cornerstone is a quantitative survey designed to capture the distinct perspectives of the seven key stakeholder groups that constitute the ecosystem.

STAKEHOLDER SEGMENTATION

The ecosystem was segmented into seven distinct groups to allow for tailored questioning and comparative analysis: (i) Investors (Venture Capital, Business Angels), (ii) Founders/Co-Founders of existing startups, (iii) Aspiring Entrepreneurs, (iv) Corporations / Large Businesses, (v) Support Network (Incubators, Accelerators, Technology Parks), (vi) Academia & Research Institutions, (vii) Public Sector & Government Agencies

QUESTIONNAIRE FORMULATION

A unique survey instrument was developed for each stakeholder group. The question design was informed by an iterative process involving:

- **Preliminary research:** Initial qualitative insights were gathered from stakeholder interviews and workshops conducted by Startup Wrocław.
- **Framework review:** The survey structure was benchmarked against internationally recognized ecosystem assessment frameworks, including methodologies from Startup Genome, the Global Entrepreneurship Monitor (GEM), and the OECD.
- **Contextual adaptation:** Questions were adapted for local relevance based on a review of national reports, such as the "Polskie Startupy" series by Startup Poland and publications from the Polish Development Fund (PFR).
- **Pilot testing:** Draft versions of the survey were pilot-tested with a small, representative group of stakeholders to ensure clarity, logical flow, and validity of the questions before full deployment.

DATA COLLECTION

PRIMARY DATA: THE MULTI-STAKEHOLDER ECOSYSTEM SURVEY

- **Survey Platform & Period:** The primary data was collected via a dedicated online survey, administered using the Webaniketa platform, and was available in English and Polish languages. The data collection window was active from July 22, 2025, to September 13, 2025. Prior to data collection, a pilot testing of the survey platform was carried out. All found errors were rectified.
- **Sampling strategy:** A non-probabilistic, purposive sampling strategy was employed. The initial sampling frame was constructed from internal databases of Startup Wroclaw and the Wroclaw Agglomeration Development Agency (ARAW).
- **Distribution and outreach:** To maximize the breadth and depth of the response pool, a multi-channel distribution strategy was executed: Direct email campaigns: Targeted invitations were sent to a curated list of known ecosystem stakeholders. Social media promotion: The survey was actively promoted across professional networks (LinkedIn) and community platforms (Facebook, Instagram and WhatsApp). Partner amplification: Key ecosystem organizations were engaged to distribute the survey to their respective members and networks. Snowball sampling: Personalized outreach was conducted by the teams at Startup Wroclaw, ARAW, and the report's author, Dr. Yash Chawla, encouraging influential stakeholders to participate and forward the survey to their peers.
- **Response sample and data cleaning:** A total of 1945 individuals landed on the survey page. Out of which 133 respondents (ca. 7%) fully completed the survey and 67 respondents partially completed the survey with the main questions. Data from these were only considered in the analysis, see the distribution in Figure 11.a.. 80 more respondents responded to a few questions, however their responses were discarded as they did not complete all the main questions. Finally the rest of the 1665 respondents did not answer any questions and dropped out from the

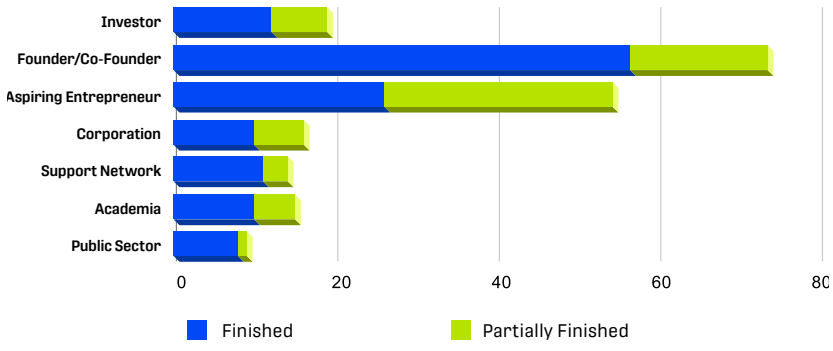


Figure 11.a. Distribution of survey participants by segment and response completion

survey home page. Partial responses were retained in the dataset to maximize the number of valid data points for each individual question. The raw data underwent a cleaning process to check for inconsistencies and remove duplicate entries.

SECONDARY DATA: TRIANGULATION AND CONTEXTUALIZATION

An extensive review of secondary data was conducted to validate, benchmark, and provide context for the primary survey findings.

- **Ecosystem databases:** Quantitative data on funding rounds, valuations, company founding dates, and founder profiles were primarily sourced from the "Map of the Polish Ecosystem," created by Dealroom and PFR Ventures.
- **Regional economic data:** Reports and datasets from Invest in Wroclaw, ARAW, and the Polish Central Statistical Office (GUS) provided critical statistics on regional economic performance, FDI, and municipal development.
- **Policy and strategic documents:** Reports from the European Innovation Council (EIC) and Smart City Department, and regional policy documents like the Lower Silesian Innovation Strategy (RIS3 2030) were used to frame the analysis within a broader strategic context. Here we would like to acknowledge Marzena Horak (City Strategy Office Director) and Robert Bednarski (Director of Smart City, Department of City Promotion and Tourism) from the Municipality of Wrocław, who provided curated information from policy documents.
- **Publicly available information:** Information was supplemented and cross-verified using company websites, official press releases, and reputable business media.
- **Assistance in secondary data collection** was provided by student volunteers from the Organizational Management program (Faculty of Management, Wrocław Tech), led by Nikol Khmura and including Jakub Bęben, Aleksandra Drozdowska, Katarzyna Karpińska, Magdalena Kotas, Maksymilian Pordzik, Mert Selcuk, Kerem Seyhan, and Nazlı Üngören. We acknowledge and appreciate their support.

A list of exact sources/reference is available on the Startup Wroclaw webpage:

DATA ANALYSIS

A mixed-methods analytical approach was employed to synthesize the quantitative and qualitative data into a coherent narrative.

Quantitative analysis: The structured survey data was processed and analyzed using a combination of Python 3.x (with Pandas and NumPy libraries in a Google Colab environment) for data wrangling and visualization, and IBM SPSS Statistics v28 for statistical analysis.

- Descriptive statistics: Frequencies, percentages, means, standard deviations, and ranges were used to summarize the data.
- Perceptual analysis: Perceptual data collected on 5-point Likert scales were analyzed by calculating mean scores to rank factors such as ecosystem strengths and challenges. The Net Promoter Score (NPS) was calculated using the standard formula: (% Promoters - % Detractors).
- Relational analysis: Cross-tabulations were used extensively to explore the relationships between key categorical variables (e.g., startup development stage vs. funding sources).
- Data visualization: A range of visualization techniques were used to present the data, including bar charts (for comparisons), donut charts (for proportions), heatmaps (for correlation matrices), stacked bar charts (for part-to-whole relationships), and Upset plots (to visualize intersections of multiple sets).

Qualitative analysis:

- Thematic Analysis: Open-ended survey responses, expert commentaries, and interview transcripts were scanned for theme frequencies using python and as the data was very less, the analysis was done manually by the lead researcher . Direct quotes were selected and used throughout the report to illustrate these themes in the authentic voice of the stakeholders.

ETHICAL CONSIDERATIONS AND LIMITATIONS

Ethical considerations: All survey participants were informed of the research purpose and their data was collected anonymously and treated with strict confidentiality. Participation was voluntary.

Use of Artificial Intelligence (AI): AI was used primarily for language correction. Gemini within Google Collab was used to assist with python programming. The lead researcher has verified all output. There was no synthetic data generated using any AI models.

Limitations: The researcher and the whole team behind this report has taken all measures to maintain the quality and reliability of data and analysis in this report. However, some limitations are noted here. (i) Sampling method: The use of non-probabilistic, purposive, and snowball sampling means the results are not statistically generalizable to the entire population of stakeholders in Lower Silesia. However, the methodology is appropriate for generating a deep, indicative snapshot of the most active and engaged segments of the ecosystem. (ii) Self-reported data: The analysis relies on self-reported data, which can be subject to individual biases such as recall bias or social desirability bias. (iii) Sample size: While the overall sample size is robust for a report of this nature and the total population sizes of each stakeholder in Lower Silesia, the number of respondents within certain sub-groups (e.g., Public Sector) is small. The findings for these groups should be considered qualitative and illustrative. Temporal snapshot: This report represents a snapshot in time (mid-2025) of a highly dynamic and rapidly evolving ecosystem. Hence it is recommended that such analysis be carried out annually at the least, to get deeper and more precis results.

Wroclaw Agglomeration Development Agency (ARAW)

is a company with 20 years of experience in shaping a modern region. It is owned by the City of Wroclaw and 32 municipalities united by a common goal: to provide residents and entrepreneurs with access to new opportunities through cooperation, a modern labor market, and education. Our activities cover many areas of life in Wroclaw and the surrounding municipalities, contributing to closer collaboration and strengthening the economic position and image of the Wroclaw metropolitan area.

See more:

Made in Wroclaw

is a pivotal annual event, spotlighting the dynamic evolution of the Wrocław business landscape. It unites leaders in business, science, technology, and innovation, from global corporations to local visionaries, to share strategies for global success. The core focus is on future-oriented collaboration, emphasizing that collective effort is essential to overcome challenges and transform them into new opportunities.

See more:

Invest in Wroclaw

focuses on creating new jobs for residents by attracting foreign investors from the manufacturing and service sectors who establish their operations in the region. In addition, it cooperates with local companies through post-investment support and strengthens the relationship between the city and the business community.

See more:

Startup Wroclaw

strongly supports and promotes the entire ecosystem of young, innovative companies in Wroclaw and its surroundings. We create the right conditions for startup development, national and international networking, promotion of business ideas, matchmaking with investors and local business environment institutions. We regularly organize Startup WRO Meetup, Tech Tap Tuesday, as well as the conference Evolutions: Meetup & Showcase.

See more:

Study in Wroclaw

We also run numerous projects supporting cooperation between municipalities, as well as initiatives in the field of education. Thanks to EU funding, we enhance the educational offer of Wroclaw's vocational schools and high schools. Through collaboration with local companies, we equip students and teachers with future-oriented skills, ensuring that school graduates are better prepared for the regional job market. We also cooperate with universities and jointly run the Study in Wroclaw project, which promotes the city's academic potential and university offer abroad. As a result, Wroclaw universities have achieved notable successes in internationalization.

See more:

Wroclaw.pl – the official city portal

We are active in social communication. ARAW is responsible for editing the official city portal Wroclaw.pl and the printed bulletin. Using all available formats and channels, we inform residents about the most important economic, social, cultural, sports, and entertainment events. In addition, we carry out information and promotional campaigns for the benefit of Wroclaw residents.

See more:

BNP PARIBAS

InvestUp

SDZLEGAL SCHINDHELM
law. tax. clarity.

INVEST PARK
WAŁBRZYCH SPECIAL ECONOMIC ZONE

WP² INVESTMENTS
everything squared

ARAW Wroclaw Agglomeration Development Agency

Startup Wroclaw

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See more:

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LinkedIn ARAW:

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