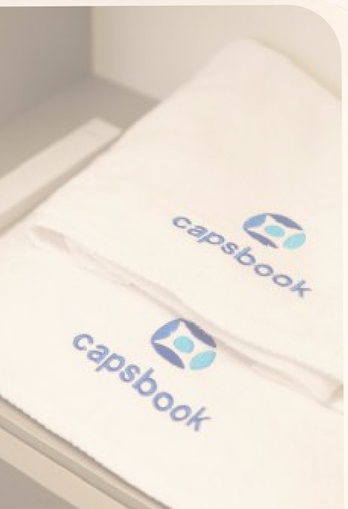
capsbook

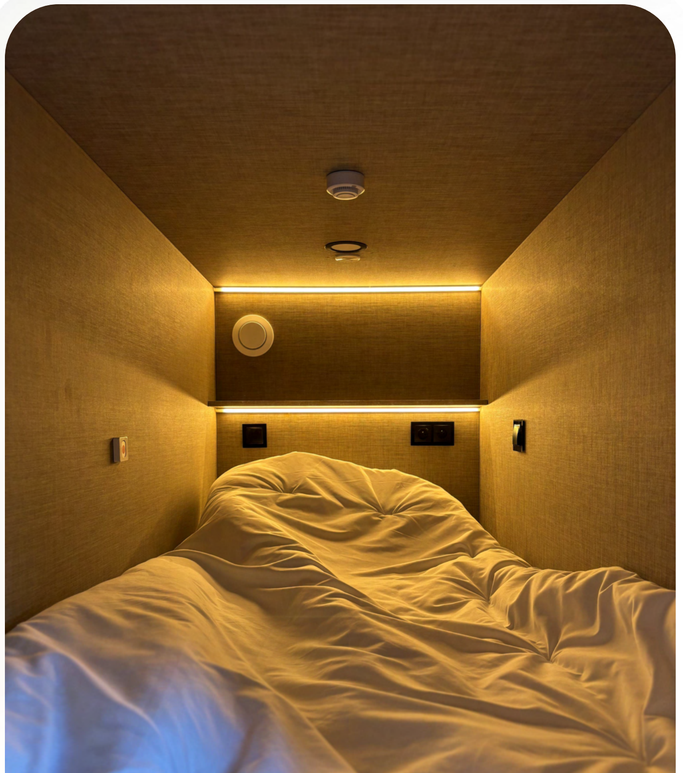
Seed Round

The Future of Sleep

Modular capsule micro hotels











capsbook

We are creating the future of affordable, flexible accommodation –

smart modular capsule micro hotels in premium standard operating autonomously and ready to be deployed in any location within 1 month.

Challenges in the hospitality industry

Limited accommodation infrastructure for transit travelers

According to the Responsible Trucking Survey 2024 (CSR Europe), many drivers in Europe still sleep in their vehicles due to the shortage of secure and hygienic rest facilities — highlighting a major gap in the mobility accommodation sector.

Legal restrictions on short-term rentals

Platforms like Airbnb or Booking.com are increasingly limited by upcoming regulations and housing communities, leading to a shrinking supply of such stays. Barcelona has already announced it will phase out all tourist apartment licenses by 2028. Similar trends are observed in other countries, including Poland.

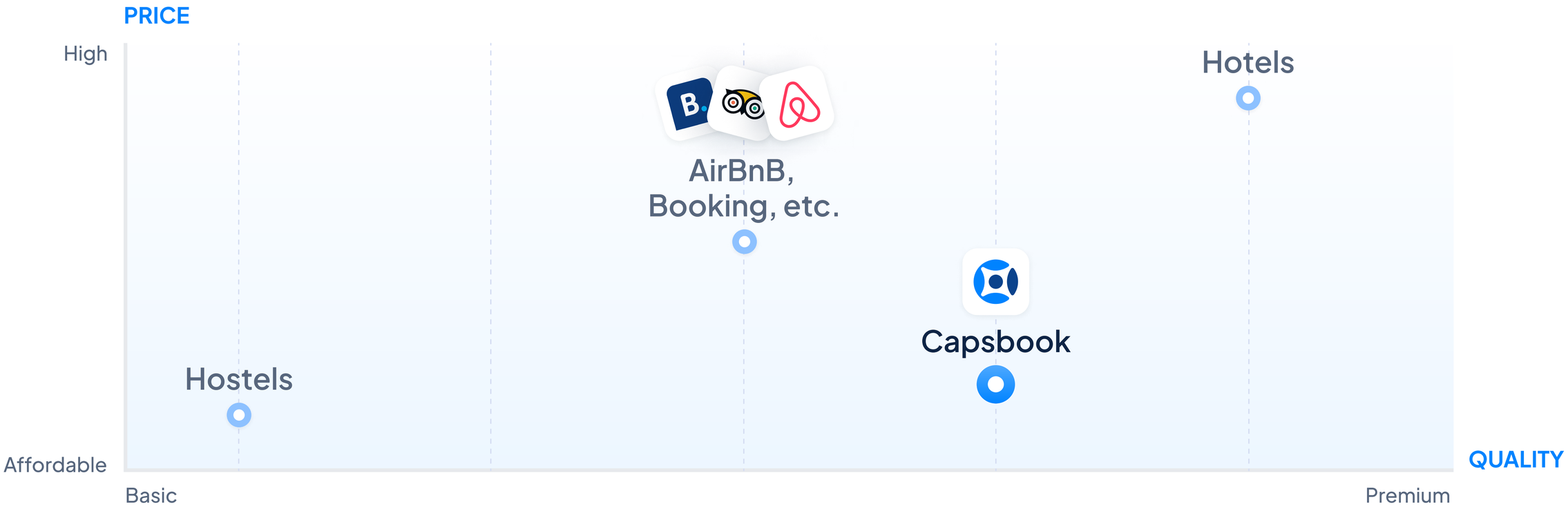
Lack of flexible and quality economy accommodation

Hostels are low-quality and non-private . Hotels generate high costs for both individual and corporate travelers. At the same time, the market lacks convenient, short-stay solutions — “right now” (in transit, between meetings, or on business trips).

Mismatch with modern traveler needs

Traditional properties rely on reception and rigid check-in/check-out hours, while customers now expect flexibility, full automation and 24/7 online service. 73% of travelers want to use their mobile device to manage their hotel experience, including checking in and out, paying, ordering food, and more.

Accommodation market overview



Capsbook combines hotel-level comfort with hostel-level affordability — filling the gap between economy and premium hospitality.

Our solution

Premium standard at an affordable price

One hotel module consists of 8 private sleep capsules and 2 bathrooms meeting high standards of lighting, ventilation, insulation and safety.

Full automation and mobile service

Booking, payment and check-in via app. 24/7 access without reception – code, PIN or NFC.

Flexible booking model

Option to stay for a full day or half-day (micro-day), adjusted to every traveler's needs.

Mobility and quick installation

Modules ready to launch in 1 month in any location: city centers, airports, along highways, at festivals, concerts or large business and sports events.











more pictures available on request











more pictures available on request

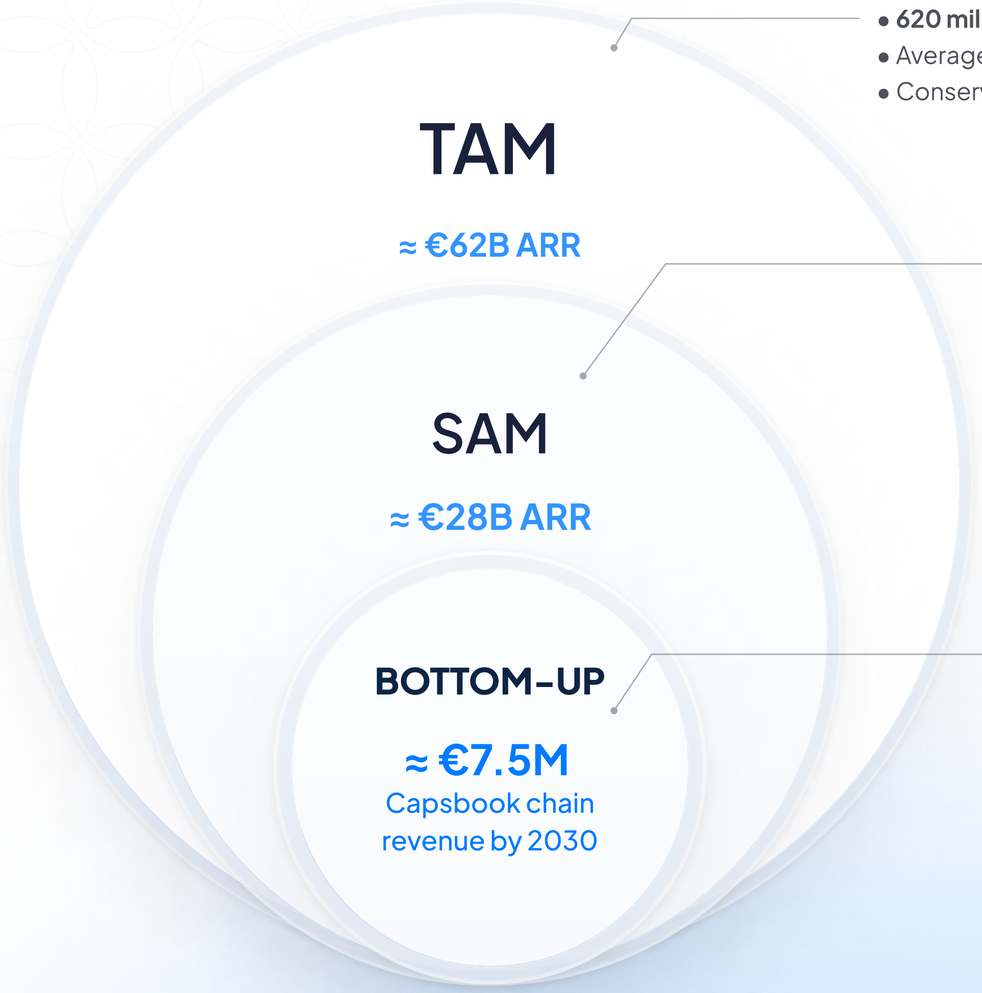
Market size

Capsbook targets short-stay budget accommodation currently served by:

- budget hotels
- hostels
- short-term rentals

First market: Poland.

37 cities over 100k residents, 14 commercial airports and 300+ motorway service areas give several hundred candidate sites for 1 to 3 modules each. Our 2030 plan uses a fraction of them.



- **620 million short trips** per year in the EU
- Average short-stay length: **~2 nights**
- Conservative economy ADR: **€50 per night**

Capsbook-compatible short-stay use cases include: solo and business travellers, transit and airport stays, city breaks, event or pop-up demand.

Together, these segments account for approximately **45–50% of total short-stay demand**.

Our 2030 plan (bottom-up):

101 modules (48 owned + 53 franchise), ~800 capsules, ~€7.5M chain revenue, of which ~€4.2M Capsbook revenue and ~€1.6M EBITDA (MID scenario, according to financial model 08/2026). MAX scenario: 172 modules, ~€9M. This is below 0.1% of SAM.

We do not need to win the market to deliver this plan. Everything above 0.1% is upside.

How Capsbook compares

Customer and operator criteria vs 4 alternatives a short-stay traveller has today.

Criteria	Capsbook	Independent capsule hotels in Poland (Kapsuła Hostel Warszawa, Capsule Kijowska)	Capsule / pod hotel chains (e.g. CityHub, YOTELAIR)	Hostels (e.g. a&o, Generator)	Budget hotel chains (e.g. ibis budget, B&B)	Short-term rentals (Airbnb, Booking)
Consistent & repeatable standard	✓	~	✓	~	✓	✗
Private sleeping space	✓	✓	✓	✗	✓	✓
Price per night (Poland)	**€18–32**	€20–72	€35–58	€14–28	€47–81	€47–93
No reception, 24/7 access	✓	~	~	✗	~	~
New location live in	**~ 1 month**	12–24 months	12–24 months	12–24 months	24–36 months	n/a
Relocatable asset	✓	✗	✗	✗	✗	✗
Suitable for airports, events & seasonal locations	✓	✗	~	✗	✗	~
CAPEX per bed	**~€10.5k**	€10–15k	€35k	€14–23k	€58k+	n/a
Brand recognition today	✗	✗	~	~	✓	✓

✓ yes, ~ partly / some operators, **x** no.

Traction – first MVP hotel

The hotel operates fully autonomously,
with no reception and minimal on-site operations.

Our performance metrics for the first 6 months after launch

950+	€23,000+	90%+	9/10	6
nights sold	booking value generated	occupancy in July and August	rating on Booking.com	sleeping units only

How we make money

1. Owned locations

Capsbook owns and operates the module. Focus 2026 to 2027.

Revenue per module / year	**~€60.5k**
Module-level EBITDA margin	**~55%**
Capex per module (net)	**~€60.5k**
Payback	**~55%**
Proof: MVP Poznań, month 5	**~2.5 years**
Sales channels	**Booking.com + own app**

2. Franchise and partner locations

Partner buys module and site. Capsbook provides brand, platform, pricing and remote operations. From 2027.

Module price to partner (gross)	**~€81.4k, at cost**
Revenue share	**15% of bookings**
Capsbook revenue per module / year	**~€9.1k**
Entry fee	**none for launch partners**
Capsbook capex	**~0**
Quality control	**standard + audits**

Revenue mix 2030 (MID scenario)

48 owned + 53 franchise modules · ~PLN 18M revenue · ~PLN 6.7M EBITDA

Owned generates the profit.
Franchise generates the growth.

Step 3 (2029+): platform and software fees for third-party capsule operators; not included in the model. Figures: financial model 23.08.2026, MID; ADR PLN 120 net, 75% occupancy.

Metric	Value
Capsules per module	8
Occupancy assumption	65%
ADR per capsule-night	€29
Monthly revenue	€4,600
Annual revenue	€55,200
Fixed OPEX / month	€1,440
Commisions & payment fees	12%
Monthly EBITDA	€2,610
Annual EBITDA	€31,300
EBITDA margin	56.8%
CAPEX per module	€81,400
Payback period	2.6 years

Unit economics of target module

A single Capsbook module is designed as a repeatable, high-margin hospitality asset.

Reality check

in August 2026 the 6-capsule MVP in Poznań ran at 91% occupancy, €640 net revenue per capsule per month (vs €575 assumed above) and a 48.6% EBITDA margin.

Financial forecasts

MID scenario, €

See full financial projections here

	2026	2027	2028	2029	2030
Revenue	0.15M	2.35M	7.0M	12.7M	18.1M
EBITDA	-0.37M	0.17M	1.8M	3.9M	6.7M
EBITDA margin	n/a	7%	25%	30%	37%
Owned modules (YE)	2	11	22	34	48
Franchise modules (YE)	0	3	13	31	53

PLN rates converted at an assumed exchange rate of EUR/PLN 4.30

Funding needs

Seed round: € 1.2M

Use of funds



Module production, 10 modules	**€664k**	**57%**
Locations: site prep, utilities, transport	**€106k**	**9%**
Technology and marketing (booking engine, direct channel)	**€210k**	**18%**
Team, operations and reserve	**€187k**	**16%**

Founder investment to date: ~€350k incl. the MVP module

What it buys, 18 months

- ✓ 11 owned modules live by end of 2027
- ✓ First 3 franchise partners operating
- ✓ Positive EBITDA from mid-2027
- ✓ Direct booking at 25% of sales (8% today)
- ✓ 18 months runway, no further equity in base plan

Terms

Instrument	**new shares, Capsbook P.S.A.**
Valuation and terms	**discussed individually**
Data room	**full model, MVP data, legal pack**

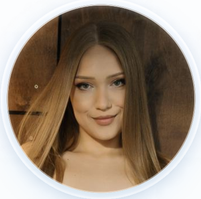
Team



Tomasz Wesołowski

Founder & CEO

Entrepreneur with 18 years in industrial engineering. Founder and owner of KONSTA, delivering advanced projects for Western European clients incl. Airbus. At Capsbook: production, technology and operations.



Lizaveta Hancharenka

CPO

Product and marketing lead with experience in digital marketing, real estate, fintech and equity crowdfunding campaigns. At Capsbook: product strategy, brand, guest experience and sales.

Hiring plan funded by the round:

- **Q1 2027** – Head of Operations (hospitality)
- **Q3 2027** – Customer experience and revenue management

KONSTA sp. z o.o.

Strategic partner

Module production partner.
Founder-owned

Local partners

Additional support

On-site operators for cleaning, maintenance and guest support in each location.

capsbook

Raising €1.2M seed to scale Capsbook across Poland and launch in Germany in 2027.



- Proven model.
- Repeatable economics.
- Capital-light path to scale.

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