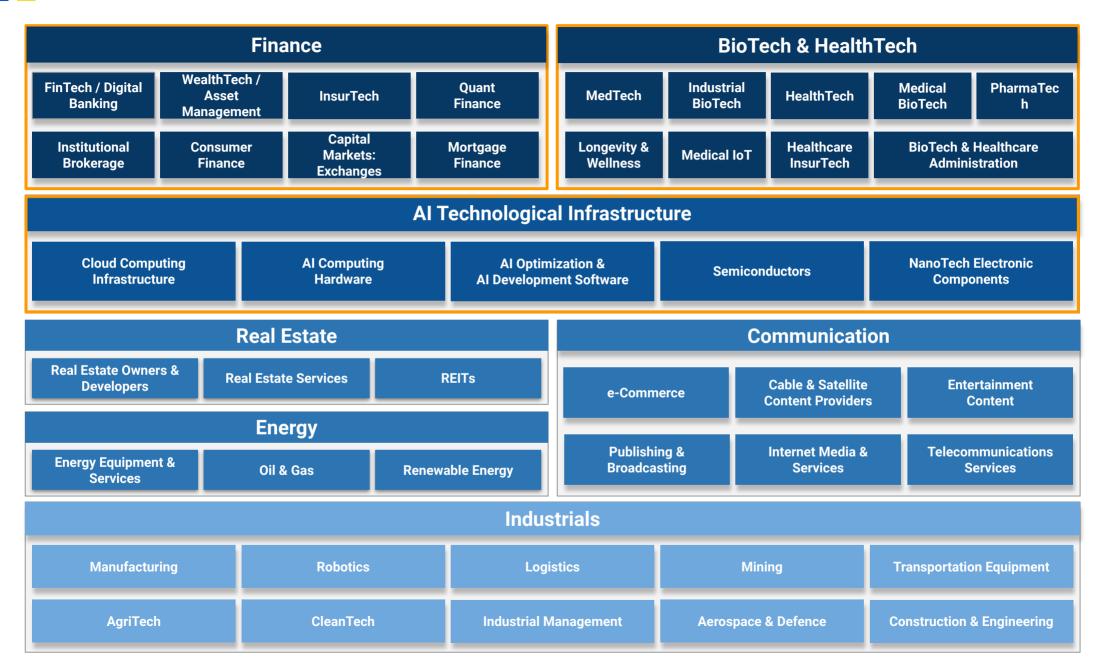


# Deep Tech and Al Ecosystem in Ukraine Teaser

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# **Al Industry Framework**



# Fusion of IT and DeepTech Industries with AI Industry

# **IT Industry**

Over 500,000 IT companies worldwide



The best companies and specialists moving into fields related to Al



Over 100 million software developers

# **Al Industry**

Over 50,000
Al companies
worldwide

Breakthroughs in generative Al

Over 4 million Al specialists

# DeepTech Industry

Over 500,000
DeepTech companies
worldwide

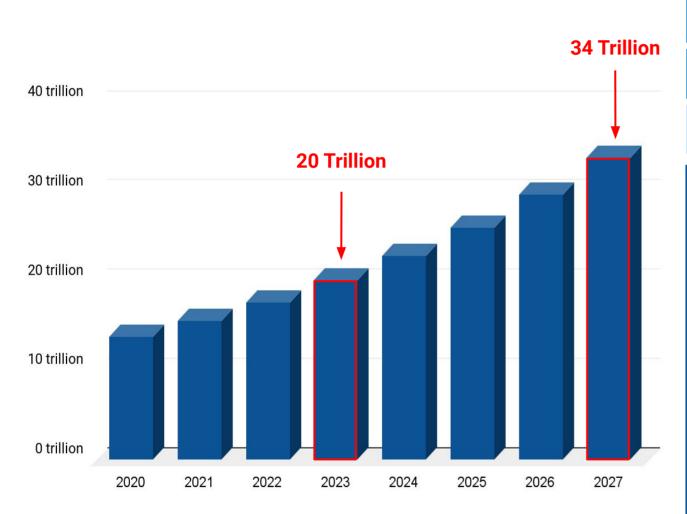


Exponentially growing demand for AI products and solutions



Over 100 million DeepTech specialists

# **Global AI Economy Size Projections (USD)**



Note: Global AI Economy Size - estimated total value of global AI assets.

# \$20 Trillion AI Economy Size

### 50,000 Al Companies

## **5 Million Specialists**

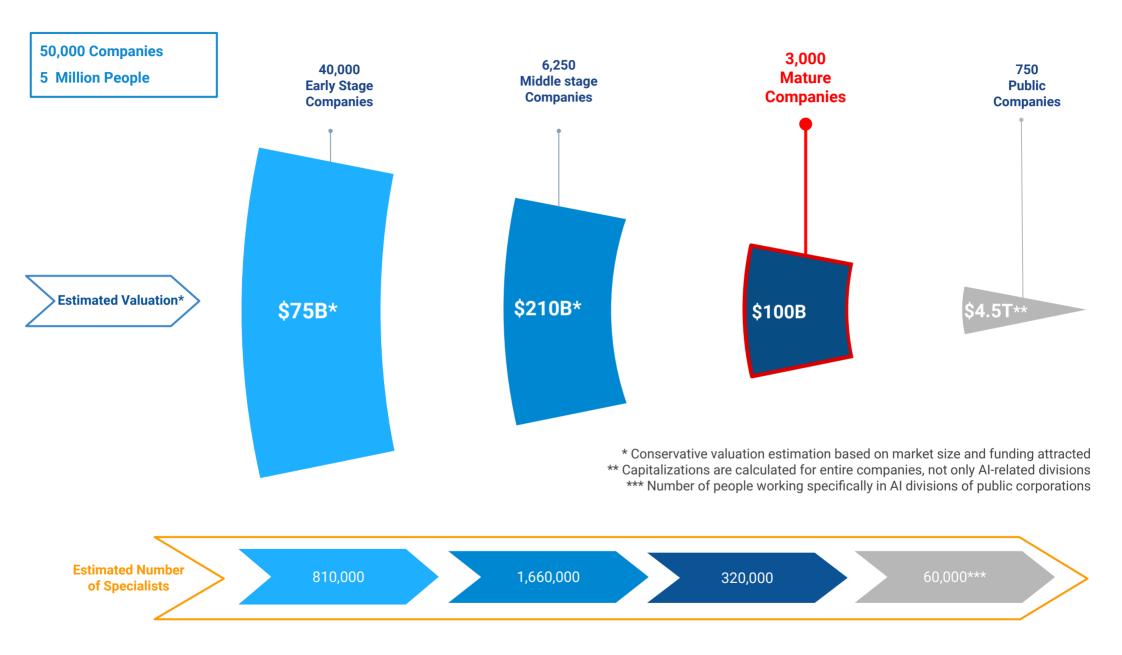
Al Industry Analytics defines the Al Economy as an ecosystem of entities whose activities are related to utilizing, developing or supplying Al technologies.

- Publicly Traded AI corporations:
   USD 16T / 1000 Corporations / 2M
   Specialists
- Private Al companies:
   USD 2.4T / 50,000 Companies / 2.7M
   Specialists
- Government-funded projects:
   USD 1.6T / 0.3M Specialists

Three key industries of the global AI economy are: BioTech & HealthTech, Finance, and AI Technological Infrastructure

By 2027, the global AI Economy size is projected to reach **USD 34 trillion**.

# Al Industry - Significant Business Opportunity and Market Capacity



# **AI Economy Size Preliminary Assessment by Country**

The AI economy has experienced remarkable growth in recent years, revolutionizing various sectors and transforming the way we live and work. Assessing the size of the AI economy on a country-by-country basis provides valuable insights into the global AI landscape. While this report does not focus on ranking, it serves as an illustrative snapshot of the AI market, showcasing the AI economy size preliminary assessment by country.

### By AI Economy Size, 2023

	US	USD 10 T
	UK	USD 1.7 T
*	CANADA	USD 900 B
	SWITZERLAND	USD 650 B
**	CHINA	USD 450 B
	GERMANY	USD 400 B
	FRANCE	USD 300 B
	ISRAEL	USD 170 B

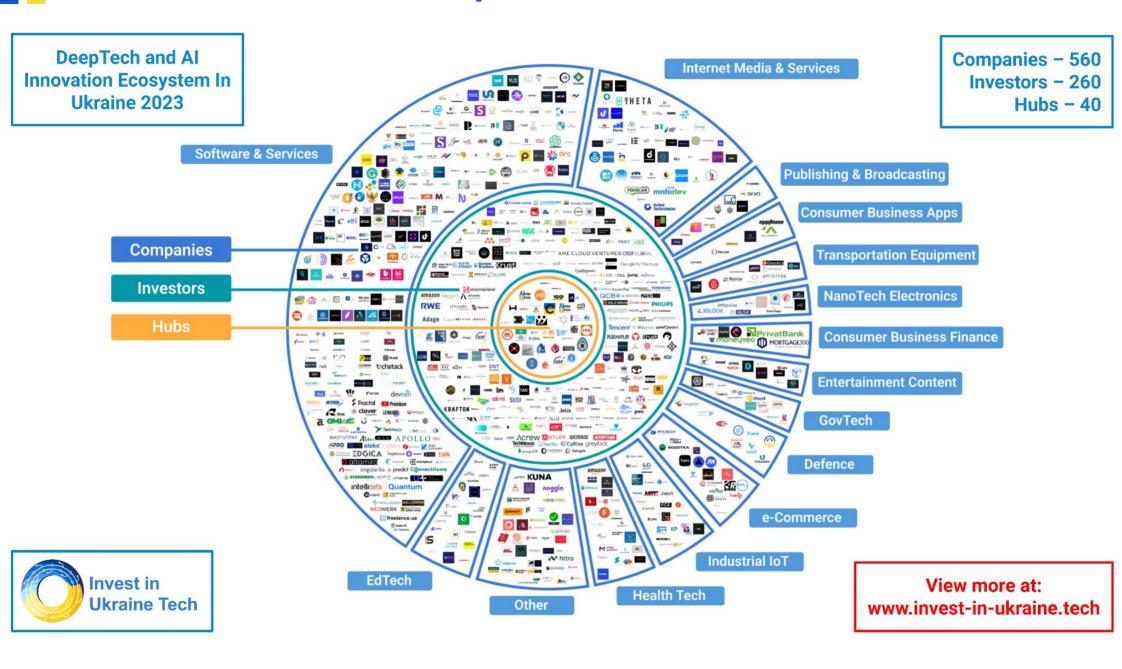
# By Government Spending on Al

	US	USD 800 B
	UK	USD 140 B
*	CANADA	USD 100 B
**	CHINA	USD 66 B
	GERMANY	USD 60 B
	FRANCE	USD 55 B
	SWITZERLAND	USD 50 B
	ISRAEL	USD 40 B

# **By Number of AI Specialists**

	US	2,600,000
	SWITZERLAND	780,000
*	CANADA	550,000
	UK	450,000
**	CHINA	350,000
	GERMANY	120,000
	FRANCE	100,000
***	ISRAEL	25,000

# **Invest in Ukraine Mindmap**



# Distribution of Industries on the Market of 560 AI Companies

4.4%

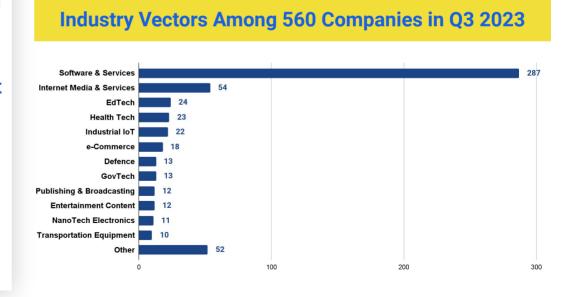
Internet Media & Services

Industry market share shows the percentage of a certain industry among all industries in which Al-related companies operate. Thus, the more companies operate in a particular industry, the greater the share of this industry in the overall market is. Since companies may implement Al technology in an almost infinite number of cases, they participate not in a single industry solely but several at a time.

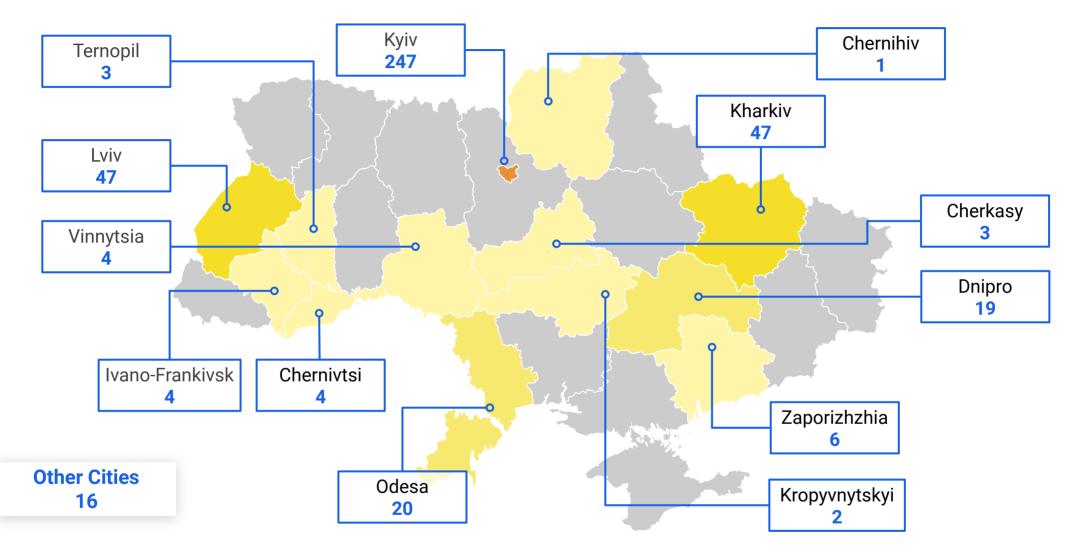
According to the graph, more than half of all companies (52%) are engaged in Software & Services, some for internal usage, and some sell their software as a service. It is followed by Internet Media & Services with the share of about 10%. Nearly one-fifth of companies work in EdTech, HealthTech, Industrial IoT, E-Commerce, GovTech, and Defence.

# Other 22.3% e-Commerce 3.3% Industrial IoT 4.0% Health Tech 4.2% EdTech

**Industry Market Share in Q3 2023** 



# Distribution of DeepTech Companies in Ukraine in Q3 2023



Most Ukrainian companies are located or registered in **Kyiv**. Also, a large number of companies are registered in large Ukrainian cities, such as **Kharkiv**, **Lviv**, **Odesa**, and **Dnipro**. Also, it can be noted the growth in the number of companies in cities such as **Zaporizhzhia**, **Ivano-Frankivsk**, **Chernivtsi** and **Vinnytsia**.

# **Solutions**



# **Collaborative Platform**

Invest in Ukraine Tech aims to find incentives to further development of AI and DeepTech in Ukraine. To this end, the specialized collaborative platform will allow to contribute to building the network of tech entrepreneurs

### Investors-to-companies smart matching

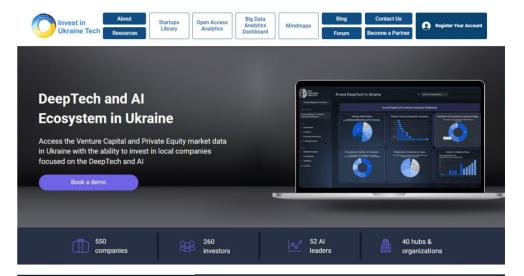
The analytical dashboard will ease the cooperation between companies and DeepTech investors. The algorithms embedded into the platform will provide the recommendations for both types of users on the mutually beneficial partnerships.

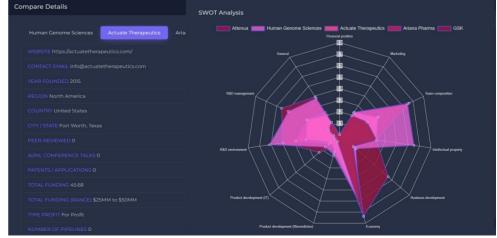
# Company-to-company smart matching

The tool is aimed to trace the interdependencies between companies and provide opportunities to back each other based on their industry fields.

# **SWOT** analysis

The tool will allow investors to receive quantifiable assessment of the companies and make a profound and specialized market intelligence.





# **Solutions**



# **Advanced Market Intelligence**

At Advanced Market Intelligence, we are passionate about revolutionizing the way businesses harness the power of Al. Our mission is to provide cutting-edge market intelligence solutions that empower decision-makers to make informed and strategic choices.

# 0

# **Proprietary Analytics**

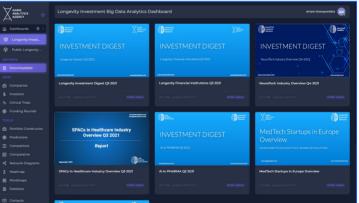
Our team of AI analytics experts and Data Science specialists use state-of-the-art technology and advanced analytics techniques to provide insights specific to your business needs. We provide Comprehensive due diligence, SWOT analysis, Industry profiling as well as monitoring of technology development status



# **Forecasting and Predictions**

With this tool you can leverage AI combined with human intelligence to predict stock prices. Predictions allow you to build forecasts on equity prices based on different approaches and compare them in real-time.

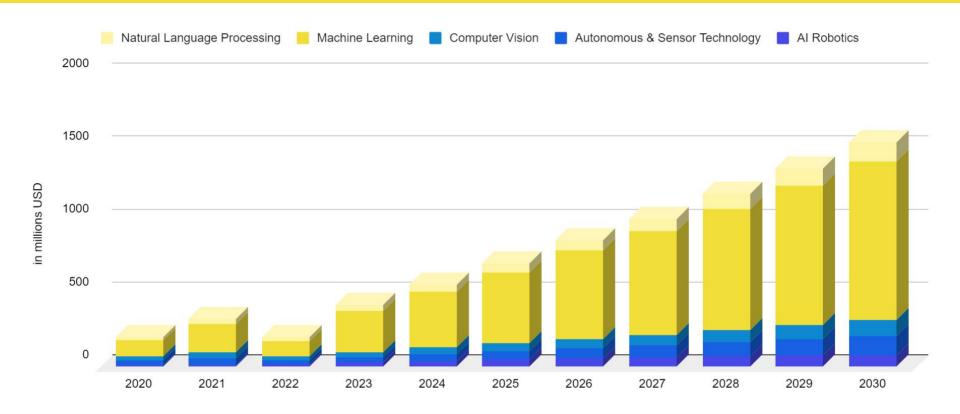






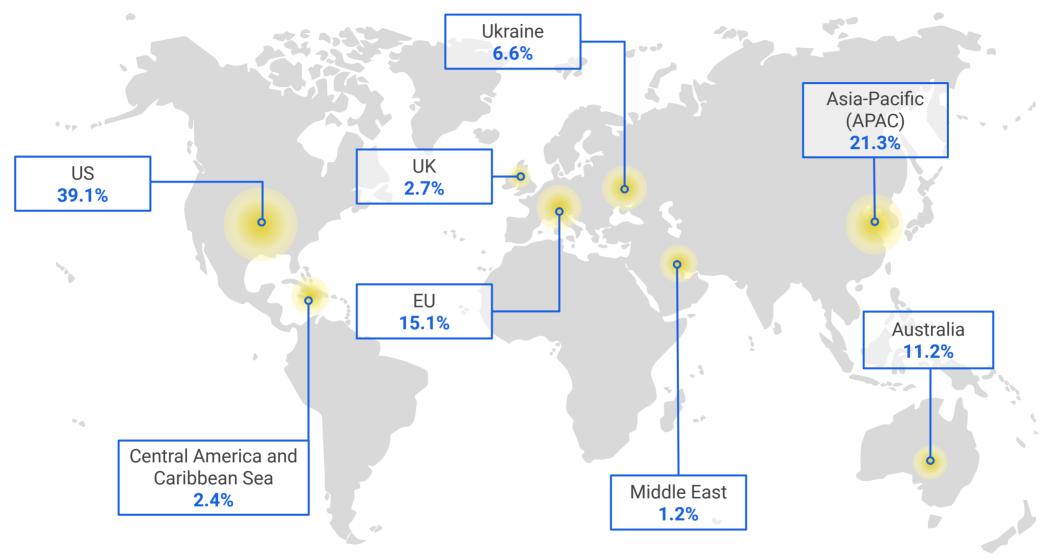
# **AI Trends**

# **Value in the Artificial Intelligence Market**



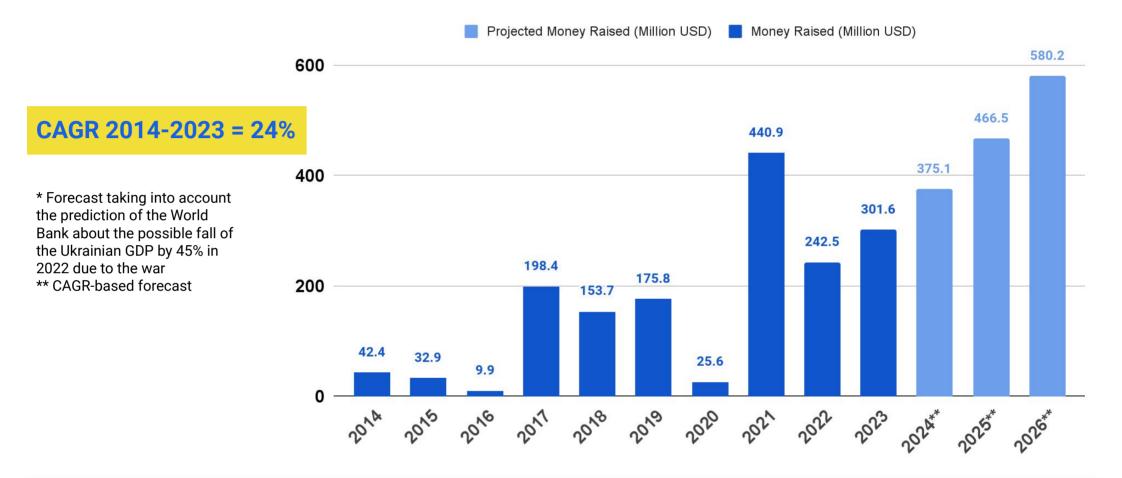
In 2023, the value of the artificial intelligence market in Ukraine is expected to reach USD 422.50 million. The annual value growth rate (CAGR 2023-2030) is expected to be 20.35%, leading to a market size of USD 1,545.00 million by 2030, which is due to increased adoption of artificial intelligence technologies in industries, improvement of artificial intelligence algorithms and infrastructure, and increased investment in artificial intelligence research and development.

# **Distribution of 260 Investors in Q3 2023**



The **United States** takes the lead in the number of investors in AI/ML companies in Ukraine accounting for 39.1% of all investors. Such distribution occurs because the United States is among the top markets where Ukrainian Al companies operate. **Ukrainian** investors take only the 5th place accounting for 6.6% of all investors.

# **Industry Funding by Years**



Investments in Ukrainian innovative companies increased significantly over the last 10 years from \$42.4 million in 2014 to \$301.6 million in 2023, which shows the incredible growth of the Ukrainian economy and the attractiveness of Ukrainian companies to domestic and foreign investors. It is worth noting the sharp decline in investment in 2020 in connection with COVID-19, and in 2022 (\$1.1 million in Q1 2022) due to the invasion and war of russia against Ukraine.

# **40 Tech Hubs in Ukraine**



**Data Science UA** 



**Kharkiv AI Community** 



**Kyiv Al Club** 

**LvivTech.**City

LvivTech.City



**Ukrainian Al** Community

Kharkiv

**UNIT.City Kharkiv** 



**Crystals** 



Promprylad.Renovation

























Al House



OBOZREVATEL

**ITalent** 







**Startup Constructor** 



















**Scythia Ventures** 

Accelerator

challenger











Center for

I nnovations

# **Top Hubs Profiling: Ukrainian Startup Fund**



# **Ukrainian Startup Fund**

The Ukrainian Startup Fund (USF) is a state fund launched on the initiative of Cabinet of Ministers of Ukraine. The mission of the fund is to promote the creation and development of technological startups in the early stages (pre-seed and seed), in order to increase their global competitiveness. The process of selecting startups for grants takes place on a competitive basis.

USF is expressly mandated to provide funding for early-stage startups. It has launched a pre-seed and seed-stage grant program, with awards of \$25,000 and \$50,000 for qualified businesses. USF plans to continue to grow this program as an important source of capital for early-stage businesses.



**Launched:** 

2018



**Location:** 

Kyiv



Type:

Accelerator

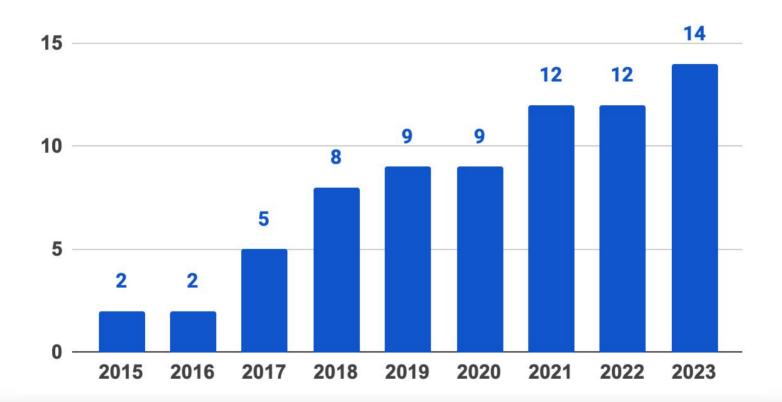


**Ownership:** 

State

# **AI- & ML-related Conferences in Ukraine**

### **Amount of AI Conferences in Ukraine 2014-2023**



Due to the dynamics of the graph, it can be concluded that the amount of AI conferences in Ukraine has been growing steadily since 2014. This indicates the popularization of this topic in Ukraine and the increase of companies that use AI technology in their activities. Most conferences in recent years have been held online due to the COVID-19 pandemic, but are transitioning back to in-person formats, even in spite of the war.

# **Key Takeaways 1/2**

# **Software & Services Segment Leads the Market**



The **Software & Services segment** takes the biggest market share – **52**% of companies. It is followed by **Internet Media & Services** with the share of about **10**%. Nearly **one-fifth** of companies work in **EdTech**, **HealthTech**, **Industrial IoT**, **E-Commerce**, **GovTech**, **and Defence**.

# **Partially Diminished Investment Potential**



The US takes the lead in the number of investors in AI companies in Ukraine accounting for almost 40% of all investors. Two-thirds of companies have seed funding status whereas VC firms and angel investors make up half of all investors of Ukrainian AI companies. Investments in Ukrainian AI increased significantly over the last 7 years from \$42 million in 2014 to \$301.6 million in 2023 with a CAGR of 40%. Unfortunately, due to the russian invasion of Ukraine Q1 2022 brought only \$1 million and the adjusted CAGR hit 24%.

### Due to the War, 41% of Ukrainian Startups Lack Money but 72% Will Try Continue to Operate



Since the war started, **71%** of startups **haven't relocated** abroad, **39%** claim that they **will run out of money shortly** and **28%** decided to **stop the operational activity**. Obviously, the dynamics of the startup market in Ukraine roughly reflects the situation with Ukrainian Al companies.

# 560 Companies 1/6

1.	12Climb
2.	20 Thousand Leagues
3.	2021.AI
4.	3D-Ace Studio
5.	3DLOOK
6.	42flows.tech
7.	482.solutions
8.	4HIRES
9.	4IRE labs
10.	4a Games
	4comfortshoes
12.	8allocate Sallocate
13.	A-Gnostics
	A-listware
	A-team
16.	ABM Cloud
17.	ABRIS Design Group
	AESTAR
	AIBRO
20.	AIDI Solar
	AKS.UA
	AR Warriors
23.	ASMBRAIN
	AYA Software
	Abto Software
	Acrovations
27.	AdMarket
	Ademrius
	Adexin
	Adimen
	Adoriasoft
32.	Advertising Management Systems Group

33. Advin

34.	AestheticCam
35.	Agiliway
36.	Agro BI by Horos.Al
37.	AgroHub
38.	Agrocontrol
39.	Ajax Systems
40.	Almexoft
41.	AltSolution
42.	Altamira.ai
43.	Altris.Al
44.	Am Integrator Group
45.	Amazinum
	Antagosoft
47.	Anthill WorldWide
48.	Apollo
49.	Apostera
50.	Appflame
51.	Appus Studio
52.	Arbrowser
53.	Arcane Future
54.	Archer Software
55.	Argus Affiliate
56.	Argus Soft
57.	Arina Software
58.	Arkhipova Advisory
59.	Arquest
60. 61.	Artkai
62.	Astroputaguraing
63.	Astraoutsourcing Attic Lab
64.	Autoline
65.	
66.	Avenga Avocado Al
00.	AVUCAUU AI

67.	Awesomic
68.	BIOsens Inc.
69.	BannerBoo
70.	Bau-Info
71.	Beatshapers
72.	BeforeCode.ai
73.	BetterMe
74.	Bicovery
75.	Big Brain
76.	Binaryx Exchange
77.	BioBetter
78.	Bionity
79.	Biopharma
80.	Bitfury Group
81.	Blitz SD
82.	Blockchain Association of Ukraine
83.	Botodata
84.	BotsBand
85.	BrainyBot chatGPT AI Companion
86.	BrandProtection.ai
87.	Brandays Designworks
88.	Brocoders
89.	Bruno Development
90.	Business Automatics JSC
91.	ByteAnt
92.	CCLoan
93.	CHI Software
94.	CITVY
95.	Captain Growth
96.	Caretech Human
97.	Casers
98.	Chatbot.Boutique
99.	Chatbots.Studio

100.

Checki

# **258 Investors 1/3**

1. 500 Global 34. B Capital Group 67. Czysta3.vc 2. 5Y Capital 35. BADideas.fund 68. Daesung Private Equity 3. 8090 Partners 36. BADideas.fund 69. Debiopharm Innovation Fund 4. AAF Management Ltd. 37. Benchmark 70. Delta Blockchain Fund 5. AC Ventures 38. Bessemer Venture Partners 71. Dentsu Ventures 6. Accel 39. Binance Labs 72. Digital Currency Group 71. Acrew Capital 40. Black Sheep Capital 73. Digitat Capital 24. Digitat Capital 25. Dozen 74. Acrew Capital Management 42. BlackRock 75. Dozen 75. Adage Capital Management 44. Blockchain Cuties Universe 77. DST Global 76. Dreamers VC 77. Admitad 44. Blockchain Cuties Universe 77. DST Global 77	1	500 Global	24	D. Conital Croup	67	Cavete 2 ve
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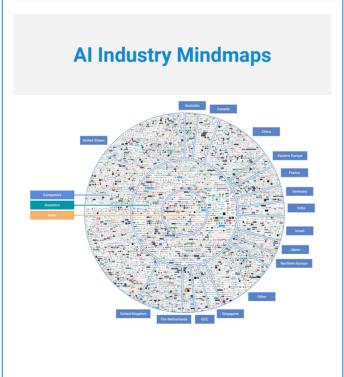
# **About AI Industry Analytics**



Over less than a month of its operation, **Al Industry Analytics** has released the IT Platform involving three major components relevant to analysis of Al Industry. The IT Platform is set to provide users the valuable information and tools for analysis of the entire Artificial Intelligence Industry.

# **IT Platform of AI Industry Analytics**





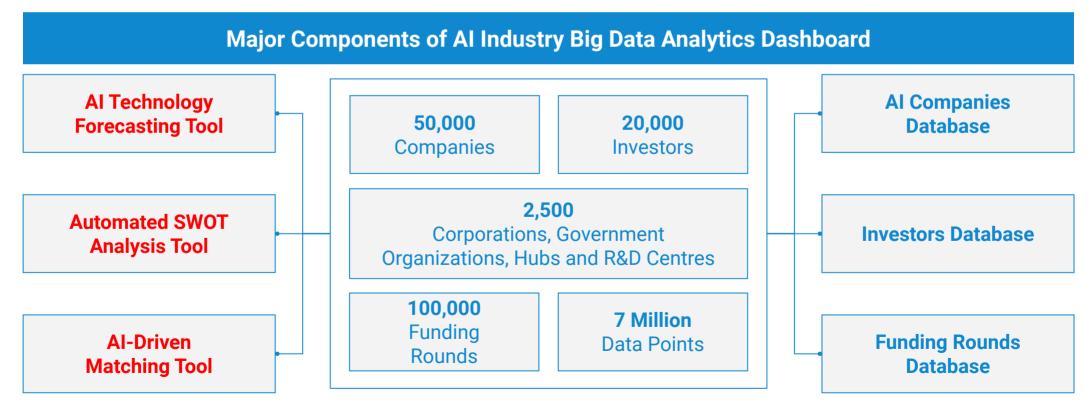


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# **Al Industry Big Data Analytics Dashboard**

The Artificial Intelligence Industry Big Data Analytics System and Dashboard is the advanced tool allowing to access and analyze vast amount of Al industry data in one place. With advanced algorithms and cutting-edge technology, Dashboard provides a comprehensive view of market intelligence and investments data across Al industry.





# **About Philanthropy.International**



Philanthropy.International aims to remove existing barriers in the philanthropy sector and to add value for all stakeholders with its Big Data Analytics System & Dashboard, an innovative system that analyses and benchmarks the global philanthropy, charity, and impact investment industry ecosystem using sophisticated, prevalidated Big Data, Machine Learning, and Al techniques. Its mission is to make the global philanthropy industry more efficient, transparent, accountable, and socially impactful.

Charity, Philanthropy, and Social Impact Platform 2.0

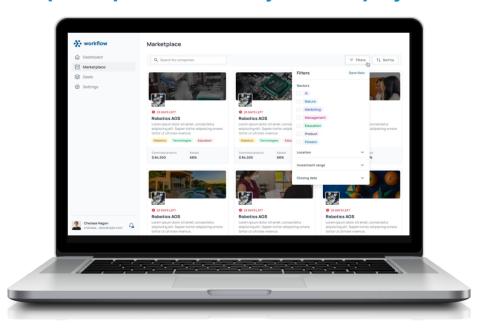
Modern approaches for venture philanthropy

Sophisticated donor-project matching algorithms

Collaborative solutions designed for charity projects

Robust transparency and accountability mechanism

Charity, Philanthropy, and Social Impact
Platform 2.0 provides the full-scope of tools
for participation in charity-related projects



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info@invest-in-ukraine.tech

www.invest-in-ukraine.tech

