TECH

ECOSYSTEM

GUIDE TO UKRAINE

2019

UNIT.City

Western NIS
Enterprise Fund

Ukraine's Tech Ecosystem Guide 2019 Ukraine's Tech Ecosystem Guide 2019 Ukraine's Tech Ecosystem Guide 2019

TECH ECOSYSTEM GUIDE TO UKRAINE

2019

Ukraine is experiencing exciting times – and we already have something to be proud of. This book is the first comprehensive review of the Ukrainian tech ecosystem. You will learn about prominent startups, accelerators, leading product companies, biggest investments, deals and cases.

We sincerely believe that now is the best time to start your innovative business or expand it to Ukraine. We hope this book will convince you of that.

Max Yakover

CEO and managing partner at UNIT.City innovation park

We are delighted to support the development of such important guidebook. WNISEF is happy to partner with UNIT.City in this effort given how crucial such visibility for the IT ecosystem and for Ukraine. It is essential that international stakeholders have more information and contact access to the breakthrough Ukrainian startups and stakeholders.

Undoubtedly the technology sector has a strategic importance to the Ukrainian economy and can redefine the way Ukraine is perceived globally in this age of digital transformation.

Jaroslawa Z. Johnson

President and CEO of Western NIS Enterprise Fund

Our company has always strived to create a favorable and stable environment for IT industry growth in Ukraine. It is a very challenging task, which clearly can't be done by a single company. Having this in mind, Sigma Software was among the originators of the EBA IT Committee to unite efforts with the leading IT companies in Ukraine and reach the common big goal.

Together we achieved a lot: in cooperation with leading universities created first strategic plan for IT education development in Ukraine, which was signed by Prime Minister; established a dialogue with State representatives; launched the first industry researches; initiated business participation in Tax Code revision; strengthened Ukraine promotion as a strong IT hub, and more.

Sigma Software is glad to support UNIT.City in creation of Ukraine tech guide. We believe it will become a new step forward to attracting investments and promoting Ukraine as a country with mature IT industry, huge talent pool, and developed infrastructure.

Valery Krasovsky

CEO at Sigma Software

Thanks to Ukrainian products and world-class teams over the past few years, our country has become a sort of tech-phenomenon.
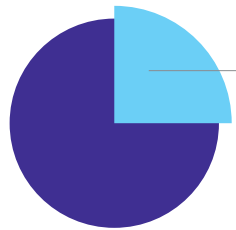
This guide makes it possible to assess the scale and quality of the Ukrainian tech industry.

Vadym Nehay

CEO at Depositphotos

UKRAINIAN TECH INDUSTRY

with offices based in Ukraine

20% [1]

world's leading companies

in software development for mobile platforms

Microsoft

ABBYY®

SAMSUNG

SIEMENS

WARGAMING

HUAWEI

Volume of IT service exports for 2017 [2]

$3.6B   3.4% of GDP

184 700 [3]

software developers

$290M [4]

in startup investments in 2018

IAOP
Collaboration at the Core.

18 [5]

IT service providers

present in the 2018 Global Outsourcing-100 list

FORTUNE 500

100+ [6]

Fortune 500 companies have chosen Ukrainian IT services

SAMSUNG   hp   Google

4000 [7]

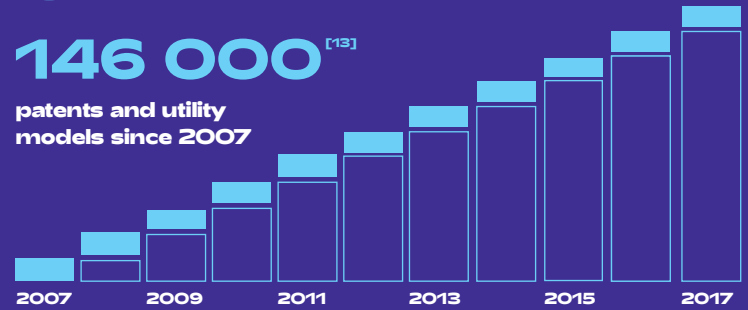**tech companies**

2nd [7]

largest export industry in 2018

It is ranked

24th [8]

best country for
software development

110+ [9]

R&D centres owned
by multinational
corporations

Netcracker   ring   ERICSSON

146 000 [13]

patents and utility
models since 2007

2007   2009   2011   2013   2015   2017

1000+ [10]

events for IT specialists,
startups and investors
every year

50+ [11]

coworking spaces
and hubs

30

industry
communities

19 [12]

exits in 2017

33 [12]

investment deals

UNIT.City

an innovation district
in Kyiv

TRENDS

According to the GLOBAL INNOVATION INDEX, Ukraine is ranked

43rd ▲7

out of 126 countries in 2018 [14]

Startup Investments [15]

2013-2016

2017

$365M

$265M

= 44 deals

with investment companies

Investment funds grow in number

20+

funds operating in Ukraine

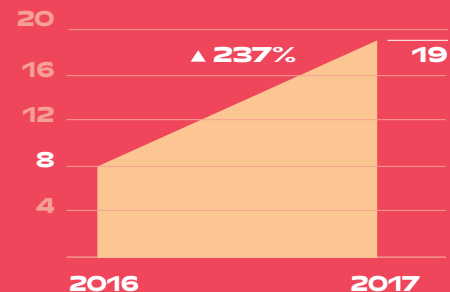**In 2018 the following funds have been established**

OVERKILL

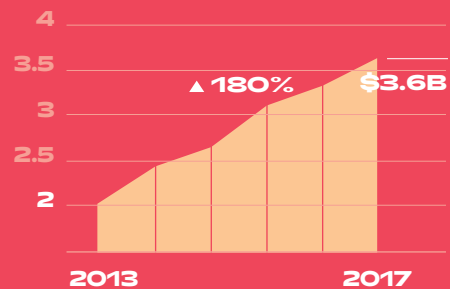Arkley

Western NIS Enterprise Fund (WNISEF) has launched

u.ventures

for investment in startups

Growth in exit numbers [16]

20
16
12
8
4

▲ 237%

19

2016   2017

Growing volumes of IT services

4
3.5
3
2.5
2

▲ 180%

$3.6B

2013   2017

2017 — Rise of the ICO [16]

19

successful ICOs

$160M

attracted

STARTUP INVESTMENTS

■ Investment volumes

■ Number of deals

$265M

88

76

$146M

78

69

$97M

44

$80M

$42M

2013 2014 2015 2016 2017
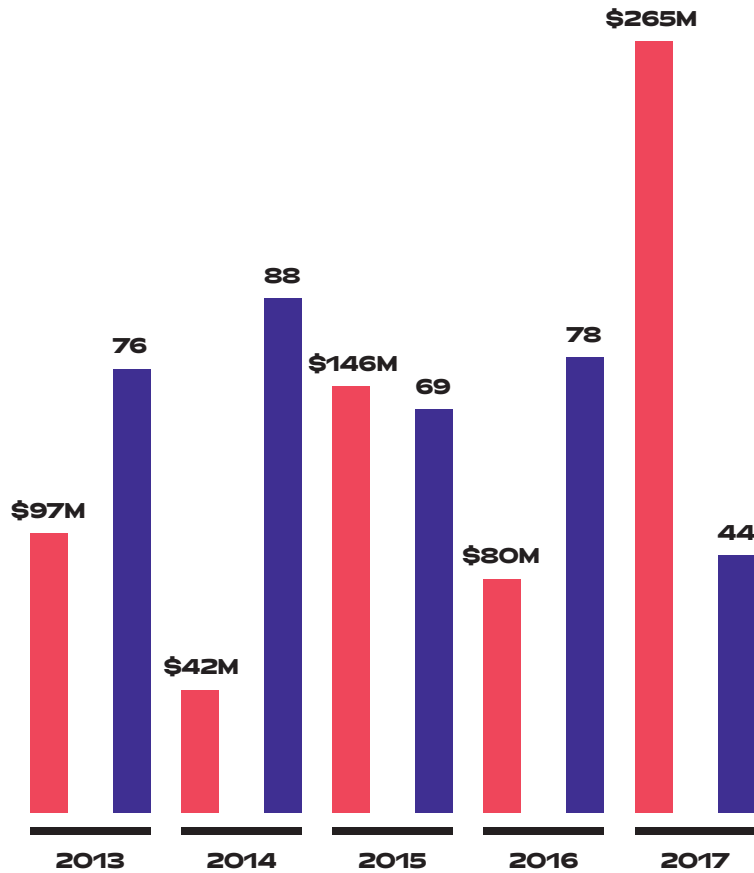
IT SERVICE EXPORTS

■ IT service export volumes

$3.6B

$3.1B

$2.6B

$2.4B

$2B

2013 2014 2015 2016 2017
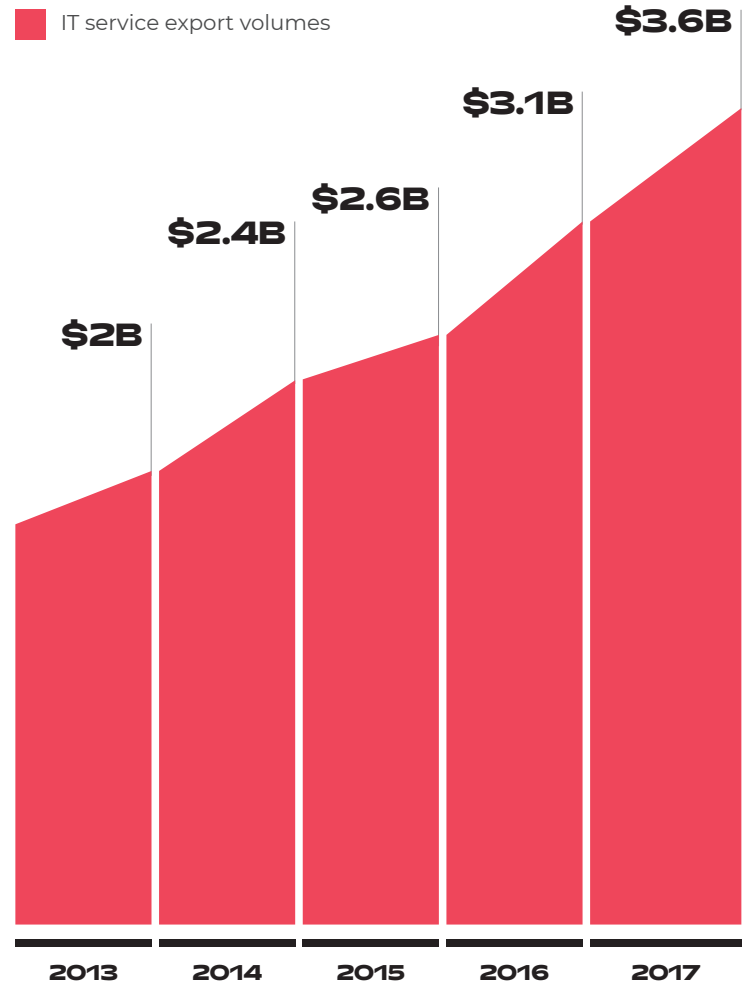
01

INVESTMENT OPPORTUNITIES IN UKRAINE

∕ **MOST ACTIVE INVESTORS**

∕ **LARGEST PUBLICLY DISCLOSED DEALS 2017-2018**

∕ **FUNDS**

MOST ACTIVE INVESTORS IN UKRAINE IN 2017 [17]

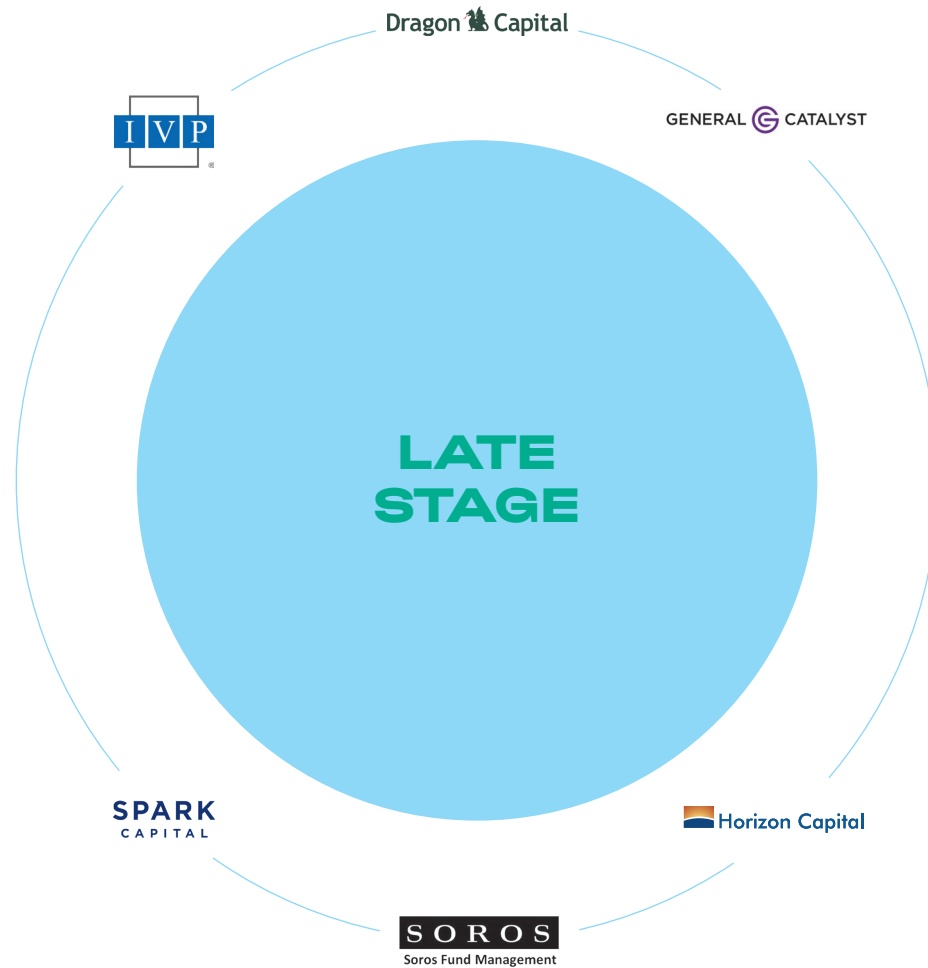# LARGEST PUBLICLY DISCLOSED DEALS 2017-2018

from Andreessen Horowitz, GGV Capital, Lightspeed Venture Partners, Index Ventures, Shasta Ventures, Y Combinator and SV Angel

$37M
People.ai

$130M
GitLab

from GV, ICONIQ Capital, Khosla Ventures and Goldman Sachs

ICO

$70M
Neuromation

from General Catalyst, IVP and Spark Capital

$110M
Grammarly

from Credit China Fintech Holdings, Korelya Capital, Naver Group, Macquarie Capital, Dentsu, Armat Group, Lian Group and iTech Capital

$110M
BitFury

ICO

$25M
DMarket

from Almaz Capital, Y Combinator, AVentures Capital, U.Ventures, Digital Future and others

ICO

$7.9M
TAAS

$10M
Petcube

$13.7M
YayPay

from QED Investors, Birchmere, Information Venture Partners, QED, Gaingels 500 Fintech Fund and Fifth Third Capital

from Greycroft, Andreessen Horowitz, Vaizra Investments, Compound, FJ Labs and SMRK

ICO

$4M
Hacken

$5M
Allset

$30M
Rentberry

$5.5M
CallPage

$4M
Preply

ICO

$20M
Remme

from Innovation Nest, Market One Capital and TDJ Pitango Ventures

from Nine Point Capital and others

$4.5M
Restream

ICO

from Silverton Partners, Anorak Ventures, COLOPL, K Cube, Liquid2 and James Armstrong

$6M
DreamTeam

$15.4M
Propy

ICO

ICO

LARGEST AMOUNTS WERE INVESTED IN THE UKRAINIAN IT SECTOR BY FUNDS

ICONİQ   G/   khosla ventures   Goldman Sachs

cumulatively –
$130M invested in GitLab

$130 000 000

110 000 000

GENERAL CATALYST

SPARK CAPITAL   IVP

110 000 000

cumulatively –
$110M invested in Grammarly

korelya capital   iTechCapital   MACQUARIE

dentsu   ARMAT GROUP   NAVER

聯明集團有限公司 LIAN BENG GROUP LTD   中国信贷 CREDIT CHINA

cumulatively –
$110M invested in BitFury

FUNDS WITH THE LARGEST SHARE OF EARLY-STAGE INVESTMENTS IN 2017

IMPERIOUS GROUP   DIGITAL FUTURE   TA VENTURE   CHERNOVETSKYI INVESTMENT GROUP

AVentures   SMRK VC FUND   u.ventures

FUNDS

AVentures

AVentures Capital

Managing partners and co-founders: Andrii Kolodyuk, Yevgen Sysoev

AVentures Capital is a VC fund established in 2012. Fund is focused on cooperation with companies that disrupt global markets while using Ukraine and CEE-based R&D teams as a leverage in global competition.

The fund's investment focus spans across software tech, including such areas as machine learning, big data, AR, VR, SaaS, cloud, storage, enterprise, web, mobile, IoT and others. The fund invests in both early-stage startups and IT companies in the growth phase.

aventurescapital.com
hello@aventurescapital.co

460+
deals in 8 years

TAVENTURE

125+
investments

TA Ventures

Founding partner: Victoria Tigipko

TA Ventures is an international VC fund investing in early-stage startups. Areas of interest include mobility, digital health, SaaS, AI/ML, online marketplaces and deeptech in fintech, and other sectors.

taventures.vc
info@taventures.vc

u.ventures

U.Ventures

Managing partners: Yaroslava Johnson, Olena Kosharna

Western NIS Enterprise Fund created U.Ventures to find new investment opportunities. It is focused on launching new technologies at an early stage with world-class teams and global growth potential.

u.ventures
info@u.ventures

Western NIS Enterprise Fund (WNISEF)

Western NIS Enterprise Fund

Western NIS Enterprise Fund (WNISEF) is a $150M regional fund, a pioneer in Ukraine and Moldova with more than two decades of successful experience in investing in small and medium-sized companies. WNISEF was funded by the U.S. government incorporated with the U.S. Agency for International Development (USAID). Since its inception, WNISEF's cumulative investments total over $185M to 129 companies employing around 27,000 people and made it possible to unlock $1.8B for companies in Ukraine and Moldova.

In 2015 WNISEF has launched a $35M legacy program focused on export promotion, local economic development, impact investing and economic leadership.

WNISEF is funding innovative, high-impact, reform focused programs and aims to support Ukraine and Moldova at this critical period by developing sound economic policy and leadership. Since 2015, WNISEF supported 100+ innovative and impactful projects in total.

Key projects: Export Promotion Office, UkraineInvest, ProZorro, ProZorro.Sale, CANactions School for Urban Studies, International Mayors Summit, Technovation Ukraine, Social Entrepreneurship, Ukrainian Leadership Academy, SEED Grant.

In November 2017, WNISEF launched a venture fund U.Ventures to invest in early-stage technology startups. To date, U.Ventures invested $3.5M into 10 startups, including Petcube, Sixa, IO Technologies, eTachki, Rallyware, 3DLook, YouTeam.

$35M
Legacy program

▶ Export Promotion   ▶ Local Economic Development

▶ Impact Investing   ▶ Economic Leadership

Goals

Find new markets and attract investments
Improve quality of life in cities and villages
Encourage development of small and medium entrepreneurship
Educate responsible citizens

Social impact

57,000
Direct Beneficiaries

6M+
people reached

Economic impact

$19.1M
funded

$3B+
unlocked / saved
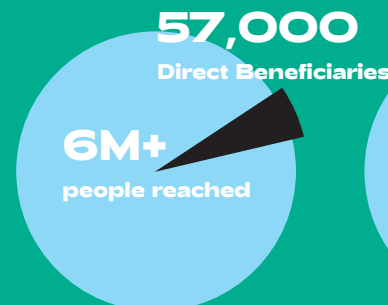
FUNDS

Digital Future

Founding partner:
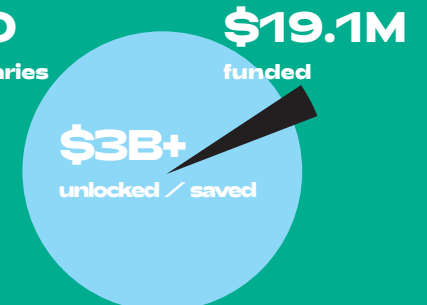Oleksii Vitchenko

Managing partner:
Volodymyr Nesterenko

Digital Future offers partners access to outstanding Ukrainian talents and technologies. Mainly focused on venture investments in the digital economy the fund generally invests in projects at later stages and, on occasion, at the seed stage, in which case Digital Future gives preference to graduates of top accelerators, e.g. Y Combinator, TechStars, etc.

digital-future.org
contact@digifuture.org

WannaBiz

Managing partner:
Alex Bornyakov

WannaBiz is a seed fund for business angels focused on global early-stage projects in advertising technologies and SaaS.

wannabiz.com.ua
info@wannabiz.com.ua

D2N8

Managing partners:
Natalya Berezovska,
Ihor Shreibman

Detonate Ventures is an investment and management company that acts as an early-stage investor, also managing their own projects in technology, media, telecommunications, marketing and strategic consulting.

d2n8.com
info@d2n8.com

Dragon Capital

Managing partners:
Yevgen Baranov,
Volodymyr Tymochko,
Andrii Nosok

Dragon Capital is the largest investment company in Ukraine. It provides a full range of investment banking and brokerage services for corporate and private clients.

dragon-capital.com
dragon@dragon-capital.com

Horizon Capital

Founder and CEO:
Olena Kosharna

Horizon Capital manages direct investment funds with a combined capital of more than $800M. The company's funds are among the most active investors in the IT sector of the region, including, in particular, such companies as Rozetka, Jooble and many others.

horizoncapital.com.ua
info@horizoncapital.com.ua

Chernovetskyi Investment Group

Managing partner:
Volodymyr Kryvko

CIG is among the largest venture capital investors in East Europe with an investment potential of $100M.

cig.vc
info@cig.vc

SMRK VC Fund

Managing Partner:
Andrii Dovzhenko

The fund invests in the following areas: software for mobile OS (mainly but not exclusively, iOS), macOS software, casual/business software, offline business' online presence, B2C and B2B services

smrk.vc
applications@smrk.vc

Imperious Group

Partners:
Dmytro Shvets, Pavlo Aleshin,
Kyrylo Mazur
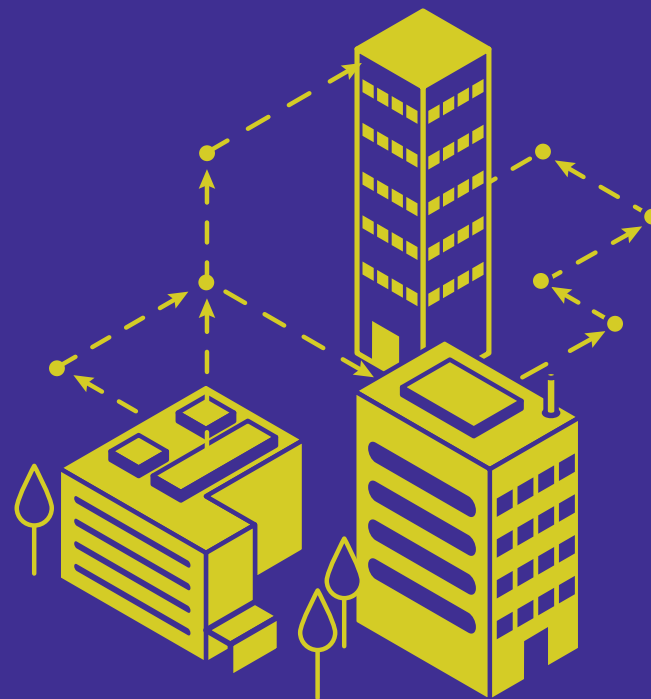
Imperious Group is an Eastern-European $25M VC with representative offices in the United States and Israel.

imperiousgroup.com
info@imperiousgroup.com

02

/ **UNIT.CITY**
/ **O2IT**
/ **ASSOCIATIONS & CLUSTERS**
/ **IT CLUSTERS**
/ **COWORKING SPACES & HUBS**
/ **ACCELERATORS & INCUBATORS**
/ **TECH EVENTS**
/ **COMMUNITIES**

OPPORTUNITIES FOR COOPERATION WITH UKRAINE'S TECH ECOSYSTEM

UNIT.CITY

UNIT.City is one of the largest innovation districts in Central and Eastern Europe.

**It is
a special place**

where businesses operating companies in creative and tech industries have access to unprecedented infrastructure and ecosystem for growth and development.

UNIT.City is a point of entry to Ukraine

for international companies and a magnet attracting innovation from around the world.

400+
events per year

8
accelerators

20
ecosystem projects

75
corporate partners

WE ARE CREATING A MODERN INFRASTRUCTURE AND A BENEFICIAL ENVIRONMENT FOR INNOVATION, BUSINESS, TALENT AND STARTUPS

UNIT.CITY TODAY

4 **laboratories**

- blockchain
- VR/AR
- product prototyping
- digital innovation lab in the agricultural sector

900

students

in the UNIT Factory
IT School

30 000 m²

3

business campuses

360

seats in the coworking space

Modern infrastructure

with universal design, restaurants, fitness club, bike sharing station, parking, etc.

60%

of first residents have done business together

1000

residents

a community made up of
100 companies

ASSOCIATIONS & CLUSTERS

01

IT Ukraine Association

It is comprised of approx. 60 leading IT companies. The Association protects the interests of the IT industry, cooperates with state authorities, local government and educational institutions. Objectives: forming favorable conditions for industry development and improvement of legislation, facilitating training of IT specialists and consolidating Ukraine's scientific and production potential, promotion of services of the Association's member companies to foreign markets.

itukraine.org.ua
office@itukraine.org.ua

02

Ukrainian Venture Capital and Private Equity Association (UVCA)

Member of Invest Europe. The UVCA is comprised of nearly 60 investment funds and private investors. Objectives include: attracting investors and protecting their interests, working with authorities to improve the investment climate, lobbying for new investment mechanisms to expand investment opportunities in Ukraine.

uvca.eu
office@uvca.eu

03

The American Chamber of Commerce (ACC) IT Committee

The ACC brings together more than 600 foreign companies and investors from 50 countries operating in Ukraine and contributing significantly to the Ukrainian government budget.

chamber.ua
chamber@chamber.ua

04

European Business Association (EBA) IT Committee

The EBA has almost 1000 member companies. The IT Committee brings together about 40 companies that develop software products and provide technology services.

eba.com.ua
office@eba.com.ua

05

UANGEL

UAngel

A community of Ukrainian business angels who invest in innovative early-stage startups. Launched in 2014, UAngel brings together investors and helps them to invest in both Ukrainian and international companies as well as to form investment syndicates.

uangel.com.ua
info@uangel.com.ua

O₂IT

O2IT is a full-cycle BPO Consultancy & Services company that provides flexible solutions for establishing and running own IT R&D centers in Ukraine. O2IT is the first on Ukrainian market to provide all required expertise under one roof to fully support «Your People. Your Office. Your Rules» approach. The leadership team brings 10+ years of experience in IT outsourcing with North American, European and Middle East clients and 200+ successful projects delivered.

The company offers various service packages combinations starting from standalone recruitment process outsourcing to the full turnkey solution for launching & supporting highly productive Teams-as-a-Product. Furthermore, the company provides access to the top junior talents via customized educational partnership programs with UNIT Factory and uData School.

o2it.solutions

IT CLUSTERS

20+ cities have created their own IT clusters

01

Lviv IT Cluster

A community of leading IT companies, which together with universities and local authorities improve and develop IT in the city. The cluster has initiated the development of the Lviv Innovation District.

itcluster.lviv.ua
info@itcluster.lviv.ua

02

Kharkiv IT Cluster

Kharkiv IT Cluster unites 73 leading companies and partners working in IT, software development and export-oriented development.

it-kharkiv.com
info@it-kharkiv.com

03

Kyiv IT Cluster

A communication platform for Kyiv-based IT companies that unites over 25 companies. They organize events for cluster members including meetups with non-tech professionals, in particular, representatives of trade missions from EU countries.

itcluster.kiev.ua
info@itcluster.kiev.ua

04

Odesa IT Cluster

The cluster brings together 18 companies, 22 international partners and over 3,000 participants.

it-cluster.od.ua
info@it-cluster.od.ua

05

IT Dnipro Community

Community consists of 29 companies and 4 partners. Well-known projects include IT Dnipro Conference and IT Biz Meetup.

itcluster.dp.ua
contact@itcluster.dp.ua

Map cities: Lutsk, Lviv, Ternopil, Ivano-Frankivsk, Khmelnytsky, Chernivtsi, Rivne, Zhytomyr, Vinnytsia, Kyiv, Cherkasy, Chernihiv, Konotop, Sumy, Kharkiv, Odesa, Mykolaiv, Zhovti Vody, Dnipro, Zaporizhia, Mariupol, Sievierodonetsk

COWORKING SPACES AND HUBS

50+ coworking spaces

01

Kyiv

01 / Chasopys and Chasopys.UNIT

chasopys.ua
prostir@chasopys.kiev.ua

02 / Coworking Platforma and Coworking Platforma Leonardo

coworkingplatforma.com
we@coworkingplatforma.com

03 / Creative Quarter

creativequarter.net
join@creativequarter.net

04 / HUB 4.0

4hub.com.ua
info@4hub.com.ua

05 / DataHub – a network of coworking spaces

data-hub.com.ua
hello@data-hub.com.ua

06 / iHub

ihub.world/ua
post@ihub.world

07 / 1991 Civic Tech Center

1991.center
hey@1991.center

08 / Kyiv Smart City

kyivsmartcity.com
hub@kyivsmartcity.com

09 / Blockchain Hub Kyiv

blockchainhub.one
hello@blockchainhub.one

10 / mOre

more.company
nd@more.company

02

Lviv

11 / ITEA Hub

iteahub.com
info@iteahub.com

12 / CoMMuna

communa.net.ua
com@communa.net.ua

13 / Startup Depot

startupdepot.lviv.ua
office@startupdepot.lviv.ua

03

Odesa

14 / Terminal 42

terminal42.com.ua
info@terminal42.com.ua

15 / Impact Hub Odessa

impacthub.odessa.ua
info@impacthub.odessa.ua

04

Kharkiv, Dnipro

16 / Fabrika.space

fabrika.space
info@fabrika.space

17 / Coworking 365

coworking365.com.ua
wow@coworking365.com.ua

Map labels: Lviv, Ivano-Frankivsk, Chernivtsi, Zhytomyr, Kyiv, Chernihiv, Cherkasy, Vinnytsia, Odesa, Kharkiv, Dnipro, Zaporizhia, Sievierodonetsk

ACCELERATORS AND INCUBATORS

01

RADAR TECH

Radar Tech

Partners: Max Yakover, Julia Poroshenko, Maxym Bakhmatov, Olena Kalibaba, Denys Dovgopoliy, Julia Mironova

A corporate accelerator focused on telecommunications, energy, fintech and agriculture.

radartech.com.ua
info@radartech.com.ua

02

CONCEPTER

Concepter

Partners and mentors:
Vlad Tislenko, Ali Kutay, Yaroslav Azhnyuk, Andrii Zdesenko and others

A Product idea accelerator focused on hardware startups ready to launch via crowdfunding.

concepter.co/accelerator

03

Ukrinnovate

Strategic Council: Gelena Savruk, Denys Gurak, Viktor Kryvenko, Ihor Kabanenko, Igor Lisitsky, Viktor Kompaneiets, Dmytro Shestakov

An agency for incubation and implementation of innovative defence technology projects.

ukrinnovate.com
info@ukrinnovate.com

04

IoT Hub Accelerator

Founder: Roman Kravchenko

A hub and an accelerator for IoT-startups focusing on robotics, smart home technology, smart clothing, drones, etc.

iothub.xyz
hello@iothub.xyz

05

1991 Open Data Incubator

1991 Open Data Incubator

Founders: Denys Gursky, Viktor Gursky

A non-commercial incubator that supports big data startups. Clients and partners are government agencies, businesses, and civil society organizations.

1991.vc
i@1991.vc

06

GROWTH UP

GrowthUP

President: Denys Dovgopoliy

It is focused on providing assistance to startups in launching and building their businesses, attracting early customers, and testing and verifying their primary hypotheses. The GrowthUP+ venture fund co-invests in seed or pre-seed B2B / B2C projects in both software and hardware.

growthup.com
is@growthup.com

07

Sector X

CEO: Andrii Komarovsky

Mentors: Andriy Verbitsky, Marvin Liao, Vitaliy Bulda

A B2B / BTC startup accelerator for teams from Ukraine and Eastern Europe in the field of big data, VR/AR, IoT.

sectorx.city
hello@sectorx.city

08

AGRO HUB

AgroHub

Founder: Julia Poroshenko

An agricultural innovation platform that brings together startups and corporations. It is specialized in market analysis, regular industry heat map and innovation reports, nurturing a culture of innovation in the agro-sector.

agrohub.org
start@agrohub.org

TECH EVENTS

01
Lviv IT Arena

A conference for industry's top managers, project managers, startups, developers, designers, business analysts, etc. The conference is held annually since 2014 in Lviv, attracting visitors from Eastern European countries. The 2018 edition was attended by 3,300 participants.

itarena.ua

02
12,000 attendees

iForum

The main event for the internet industry dedicated to startups, internet marketing and advertising, software development, education, blockchain and cryptocurrencies. The event has been held annually in Kyiv since 2009. In 2018 it was attended by 12,000 participants.

2018.iforum.ua

03
7,000 attendees in seven years

IT Weekend Ukraine

A series of international IT conferences was held in different cities of Ukraine, as well as in Poland (Wroclaw) and Bulgaria (Sofia). 90% of the "weekend" speakers are world class experts. Over 7,000 IT specialists and 275 speakers attended more than 80 conferences in seven years.
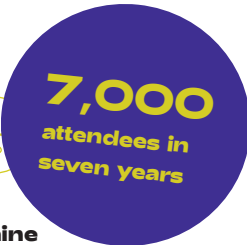
itweekend.events

04
UNIT Investment Summit

A conference for investors, venture funds, business angels, internet entrepreneurs, startups, ecosystem leaders, and IT professionals from over 10 countries in Central and Eastern Europe and Ukraine. Summit organizer is UNIT.City innovation district.

42.unit.city/investment-summit-18

05
UNIT Fintech Forum

It is an innovation and technology forum for the banking industry, including blockchain and cashless economy. The event is conducted by UNIT.City innovation district and UFuture Investment Group.

fintech.unit.city/forum

06
Devoxx Ukraine (former JavaDay)

According to a respected online portal DOU.ua, Devoxx Ukraine is among the top 3 events for software developers in Ukraine. The event attracts an audience of more than 1,000 visitors. World-renowned Java experts are among the featured speakers of the conference.

devoxx.org.ua

1,000 attendees

07
1,600 attendees

ITEM

The conference is dedicated to IT and software development. It is held annually since 2013 in Dnipro. Visitors include top managers, technical directors, PMs, developers and QAs. Estimated number of visitors is 1,600.

item.com.ua

08
500 attendees

SaaS Nation

A Software-as-a-Service oriented conference aimed at founders, C and VP level partners and managers. Speakers work in top managerial roles for Ukrainian and European product companies developing SaaS platforms.

saas-nation.com

09 Kyiv Outsourcing Forum

2,000 attendees

The largest Ukrainian forum for product- and service-based IT companies. The forum has been held in Kyiv since 2008. It attracts around 2,000 visitors annually. Among them are top managers of large and medium-sized IT companies.

outsourceforum.org

10 Mobile Beach Conference Odesa

Europe's fastest growing conference on mobile, programmatic, VR and AR.

mobilebeach.rocks

11 QA Fest

It is the largest testing conference in Ukraine. Is held annually since 2013 in Kyiv. Speakers include experts from Ukraine, CIS and other countries of the world.

qafest.com

12 .Net Fest

600 attendees

The main conference on .NET development in Ukraine. It is devoted to the latest technologies in the industry as well as their practical application. Size: around 600 visitors. The conference is hosted by leading experts from Ukraine, CIS and the rest of the world.

dotnetfest.com

13 JEEConf

1,000 participants

This international conference caters to Java professionals. It has been held in Kyiv for 8 consecutive years and attracts world-class speakers. In 2018 experts from Twitter, Pivotal and others appeared at JEEConf.

jeeconf.com

COMMUNITIES

01 #UTEW — UTEW (Ukrainians at Tech Events of the World)

Founders: Olexandra Govorukha, Inna Stelmakh

An open Facebook community with 3,000 people. Participants attend international tech events to find business partners and investors. They regularly meet offline in order to share best business development practices and better represent Ukraine in the international tech community.

utew.tilda.ws/utew

02 DS — Data Science UA

Founder: Olexandra Syrovatko

A community for Data Science professionals. They organize industry conferences and meetups, support their members with educational and recruitment opportunities, spread awareness and conduct trainings.

data-science.com.ua

03 TESTUA STARTUPS — Test UA startups

Founders: Olexander Maydanyuk, Maryna Shevchenko

A community that hosts «testathons» – hackathons for software testers. Participants challenge themselves with new projects, receive feedback and build up their experience. Tech products of various maturities can get their products tested for free. Well-known Ukrainian startups like Petcube, Recap, EdEra and others provided their products for testing.

testuastartups.com

04

PM community

A community for project managers operating as a platform for networking and sharing best practices. They organize discussion clubs and annual PM Forums attracting participants from Ukraine and Europe.

spiderproject.com.ua/community/about

05

Bitcoin Foundation

A public organization, which is a platform for communication and information support for cryptocurrency and blockchain specialist protocols. Founded by Blockchain Hub Kyiv.

bitcoinua.org

06

UNIT Residents Club

UNIT.City innovation district members' club. The community organizes educational and networking events for residents, meetings with investors. They established the EiR mentoring program in Ukraine, which is also opened for non-residents of the district.

The community provides UNIT.Perks, a pack of exclusive perks from about 70 international and Ukrainian companies that operate worldwide.

unit.city/residents

07

SaaS Nation Community

A Facebook community includes 900 members for experience exchange among C and VP level founders, managers from SaaS companies.

facebook.com/groups/633153890179957

08

IT community

The IT Community was founded in 2014 as an information and communication source. There IT specialists of different levels can share their experience about new products and their configuration features. The community is supported by the efforts of authors who represent different areas of information technologies. It is an open project, and anyone can apply and publish materials and subsequently become a permanent contributor.

it-community.in.ua

09

WTECH

A community for female executives in IT, founders of startups, investors, venture capital partners, top managers and executives in IT companies. It was founded by TA Ventures and SLOVA Tech PR.

wtech.club

10

Silicon Drinkabout

The Community was created for Ukrainian developers from tech companies. They hold informal meetings on Fridays in order to exchange ideas, news and have fun.

facebook.com/SiliconDrinkaboutKiev

11

Developers.Org.Ua

The largest community of Ukrainian software developers, founded in 2005.

dou.ua

03

/ **KEY TECHNICAL HIGHER EDUCATION INSTITUTIONS**

/ **IT SCHOOLS AND COURSES**

KEY EDUCATIONAL PROJECTS

KEY TECH UNIVERSITIES

200+

institutions where they teach IT specialties

16,000 [18]

specialists per annum

IT training is provided by higher education institutions of various types of ownership in all big cities of the country and by dedicated courses that often cooperate with IT companies and communities so that graduates' knowledge meets the needs of the market.

According to the DOU.ua, during 2016, 35,000 specialists were trained, and a year earlier – 30,000.

National Technical University of Ukraine "Ihor Sikorsky Kyiv Polytechnic Institute"

Number of students: 30,000

The largest technical university of Ukraine. It is one of the world's top 1,000 best universities (ranked 501st in QS World University Rankings) and is one of the best universities in the CIS (category B "very high level of graduates training"). The University comprises nine institutes and 19 faculties, as well as a design bureau and a sci-tech association. Among the specialties are mathematics and engineering, telecommunications, computer science, space technologies, etc.

On the basis of NTUU "KPI" an ecosystem for the development of innovative projects Sikorsky Challenge has been created. It includes startup school, the festival of innovative projects, incubator, technological environment Sikorsky Lab, intellectual property center, venture fund, etc.

Kharkiv National University of Radio Electronics

Number of students: 11,000

According to the Kharkiv IT Cluster this is №1 education institution for IT specialists in Kharkiv. It is also one of the best educational institutions in Ukraine in the field of radio electronics, telecommunications, information technologies and computer engineering.

National Technical University "Kharkiv Polytechnic Institute"

Number of students: 22,000

One of the world's top 1,000 best universities (ranked 701st in QS World University Rankings). The institute offers training programs in eight IT fields. The university is included in the Microsoft IT Academy, Oracle IT Academy programs and trains students for the Cisco Academy program.

04

Zhukovsky National Aerospace University "Kharkiv Aviation Institute"

Number of students: 8,000

KhAI prepares technical specialists in the fields of aviation and aerospace technology, automation, instrumentation, information technology, cybersecurity, telecommunications and others.

06

Taras Shevchenko National University in Kyiv

Number of students: 25,000

One of the world's top 500 universities in the world (ranked 431st in QS World University Rankings) and holds top positions in national ratings. It hosts Startup Business Incubator Business School. Their students have an opportunity to gain additional insights on how to organize their own business and get to know investors.

05

Lviv Polytechnic National University

Number of students: 25,000

The University holds top positions in all national ratings of higher education institutions. The Tech StartUp School was created on the basis of the university.

07

National University "Kyiv-Mohyla Academy"

Number of students: 3,500

This higher education institution holds top positions in local ratings, cooperates with dozens of international educational institutions, academic and cultural communities.

IT COURSES AND SCHOOLS

01

Computer academy "STEP"

Established in 1999
Number of graduates: 95,000

It is specialized in long-term professional and children's IT education. Has a license from the Ministry of Education and Science for training 300 bachelors and 100 masters every year. Graduates of the academy work in all major IT companies of the country. The academy has schools in most of the country's regional centers and in Kyiv.

Location: 18 countries of the world, in Ukraine – Kyiv, Kharkiv, Dnipro, Odesa, Lutsk, Lviv, Rivne, Vinnytsia, Mykolaiv, Zhytomyr, Khmelnytskyi, Chernihiv, Poltava, Kamyanske, Kryvyi Rih, Zaporizhia, Kherson, and Mariupol

Training programs: software development, computer and mobile games, computer graphics and design, networking and security, QA, frontend development, etc.

itstep.org

02

Main Academy

Number of graduates: over 6,000

Location: Kyiv, Lviv, Kharkiv, Odesa, Ternopil, Vinnytsia, Mykolaiv, Kherson, Zaporizhia, online

Training programs:
QA, frontend development, Java, PHP, C#, Python, Android.

mainacad.com

03

CyberBionic Systematics

Number of graduates: 3,000 annually

Location: Kyiv, online

Training programs: Java, Python, C#/. NET, frontend development.

edu.cbsystematics.com

04 UNIT Factory

UNIT Factory

Number of students: 900

The education system is based on the method of the French school "42", where students study peer-to-peer (from each other) with gamification elements. Students are working on real tasks in real companies, and in addition to professional skills they acquire teamwork skills, as well as the ability to reveal their creative potential.

Location: Kyiv

Training programs: game developer and mobile app developer, web developer, software architect, security specialist, and others.

unit.ua

05 LITS (Lviv IT School)

Number of graduates: 2,000

Location: Lviv, Odesa, Mykolaiv, Ivano-Frankivsk, Chernivtsi

Training programs: ML, Python, Web UI, QA, product management, scrum and agile, UX/UI, business development, etc.

lits.ua

06 Sigma Software University

Sigma Software University

Number of graduates: 600 annually

A learning platform to share knowledge and experience with the IT community in Ukraine. The target audience for its trainings varies from interns up to senior level professionals.

Location: Kyiv, Odesa, Lviv, Kharkiv

Training programs: Java, JavaScript, PHP, Android, iOS.

university.sigma.software

07 QALight

QALight

Number of graduates: over 8,000

Location: Kyiv, Lviv

Training programs: testing (basic unit, testing of web services, mobile applications, etc.), development (HTML5 and CSS3, JavaScript Basic, FullStack Web Developer, etc.), tech skills (Unity and network basics, Big Data, Hadoop, etc.), soft skills (IT Product Manager in IT, etc.)

qalight.com.ua

08 SoftServe IT Academy

SoftServe IT Academy

Number of graduates: 1,600 annually

One of the SoftServe University divisions. Employment rate of graduates is about 70%.

Location: Lviv, Kyiv, Dnipro, Kharkiv, Rivne, Ivano-Frankivsk, Chernivtsi, Sofia, Wrocław, Białystok, Gliwice

Training programs: DevOps, Web UI, Java, C++, .NET, iOS, etc.

career.softserveinc.com/uk-ua/technology

09 Projector

Projector

Number of graduates: 1,500 annually

Location: Kyiv, Odesa, Lviv, London, Prague, Berlin, online

Training programs: over 60 courses in six subjects – UI/design, graphics and media, gamedev, coding and programming, urban design, marketing and management.

prjctr.com.ua

10 Ukrainian IT School

Ukrainian IT School

Number of graduates: 1,600 annually

Location: Kharkiv, Mykolaiv

Training programs: web design, layout, frontend advanced, JavaScript, PHP, QA, automation QA, English for IT.

uitschool.com

11 GoIT

GoIT

Number of graduates: over 2,000 annually

Location: Kyiv, online

Training programs: Fullstack, QA, Java, PHP Wordpress, etc.

goit.ua

12 uData School

uData School

Number of students: 90+

Location: Kyiv

Training programs: mathematical education for data science professions.

udata.school

04

R&D
CENTERS

360°

R&D CENTERS

There are

110+
R&D centers in Ukraine

USA is the largest R&D partner of

45% [19]
of the companies

There are over 110 research and development centers in Ukraine. Ukraine's largest R&D partner is the United States (45% of companies), followed by EU and Israel. Areas of expertise of Ukrainian R&D centers include games, e-commerce, big data and artificial intelligence,

telecommunications, Internet, software development and other fields.

More than half of the R&D centers are located in Kyiv. Other major research centers are located in Dnipro, Lviv, Kharkiv, Odesa and Vinnytsia.

Acquired by Amazon for $1B

01

Ring

**Headquarters:
Santa Monica, USA**

Offices: Kyiv

Number of employees: 500

Startup Ring was developing the "smart" door locks and had its R&D office in Ukraine. In 2018 the Amazon Corporation purchased Ring for $1B. Following the acquisition, the company's offices in Ukraine continued their work.

Company profile: software development in the field of machine learning, computer vision, intelligent data analysis.

02

Snap

**Headquarters:
San Francisco, USA**

Offices: Kyiv, Odesa

Number of employees: 200

It was a Ukrainian office of the company that created lenses for iPhone X. Apple used them in a PR campaign.

Company profile: Snapchat filters, Face Tracking Technology.

03

Plarium

**Headquarters:
Herzliya, Israel**

Offices: Kyiv, Lviv, Kharkiv, Odesa

Number of employees: 1,200

Plarium develops mobile and social games with a total audience of 250M users. It has 1,200 employees and 8 studios.

Company profile: mobile and social games for Android and iOS.

04

Samsung R&D Institute Ukraine

**Headquarters:
Seoul, Republic of Korea**

Offices: Kyiv

Number of employees: 600

Ukraine has one of the largest R&D centers in Europe that develops expertise in the areas of artificial intelligence and machine learning.

Company profile: computer vision research and human-computer interfaces, new types of multimedia content use and creation programs, converged devices (device-2-device, device-2-cloud), information security, artificial intelligence, natural language processing (NLP), human-computer interaction (HCI), information retrieval, computational intelligence.

05 NetCracker

NetCracker

Headquarters: Boston, USA

Offices: Kyiv, Odesa, Sumy

Number of employees: 1,000

Company's clients are AT&T, France Telecom, Deutsche Telecom, DHL. Over a thousand of the 5,000 programmers, analysts and other IT specialists of the company are working in Ukrainian R&D.

Company profile: telecommunication processes management services.

06 Playtika

Playtika

Headquarters: Tel Aviv, Israel

Offices: Kyiv, Dnipro, Vinnytsia

Number of employees: 750

One of the world's largest social casino games development companies.

07 astound

Astound Commerce

Headquarters: San Francisco, USA

Offices: Kyiv, Vinnytsia, Chernihiv, Uzhhorod

Number of employees: 600

It is one of the world's leaders in e-commerce development. Four out of seven development centers are located in Ukraine.

Company profile: e-commerce solutions, including development, UI/UX design, business analytics.

08 SIEMENS

Siemens

Headquarters: Munich, Germany

Offices: Kyiv, Lviv

Number of employees: 300

Company's Ukrainian office is engaged in IT implementation in several industries. The company's solutions are used there.

09 ORACLE

Oracle

Headquarters: Redwood, USA

Offices: Kyiv, Kharkiv, Lviv, Dnipro, Odesa

Number of employees: 500

In 2015, the company purchased Ukrainian Maximizer and thus multiplied the presence of R&D centers in Ukraine by two. Ukrainian IT specialists specialize in cloud solutions.

10 ERICSSON

Ericsson

Headquarters: Stockholm, Sweden

Offices: Kyiv, Lviv

Number of employees: 300

Their first office in Ukraine was opened in 1995. The company opened its R&D center in Lviv following the acquisition of Ericpol.

Company profile: cloud technologies and IP.

11 HUAWEI

Huawei

Headquarters: Shenzhen, PRC

Offices: Kyiv

Number of employees: 150

Huawei is one the largest suppliers of telecom equipment and smartphones in the world. It is rapidly developing its R&D office in Ukraine.

Company profile: consumer electronics, IT solutions for enterprises, telecommunications.

12 Wargaming

Wargaming

Headquarters: Minsk, Republic of Belarus

Offices: Kyiv

Number of employees: 400

The largest game developer in the CIS with an active audience of more than 60M users of the flagship game World of Tanks. Almost 400 of 2,200 company's specialists work in Ukraine.

13 SIGMA Software

Sigma Software

Headquarters: Stockholm, Sweden

Offices: Kyiv, Lviv, Kharkiv, Odesa

Number of employees: any Sigma Software specialist with good ideas can join R&D. The number is currently over 850.

One of the largest software development companies in Ukraine. It is included in The 2018 Global Outsourcing-100 rating. The company develops its own expertise and provides consulting services in IT. Has R&D centers in all Ukrainian cities where the company operates.

Company profile: information, AR/VR, blockchain, machine learning, data science, AI, cybersecurity.

14 GAMELOFT

Gameloft

Headquarters: Paris, France

Offices: Kharkiv, Lviv

Number of employees: 600

Famous French video game developer for various platforms.

Games of the company are distributed in 100 countries, the total audience of about 157M users. The tenth of 6,000 Gameloft employees are working in Ukraine.

15 playtech

Playtech

Headquarters: London, UK

Offices: Kyiv

Number of employees: 600

The largest online software developer on the London Stock Exchange with a capitalization of $2.18B. The company employs a team of 5,000 professionals.

LABORATORIES

01

Fabricator/FabLab

One of the largest prototyping laboratories in Ukraine and a part of the FabLab global network.

The company has modern equipment, expertise and licensed software. The company's purpose is to form the community, exchange expertise and develop open-source projects.

fabricator.me
info@fabricator.me

02

Sensorama VR/AR Lab

A virtual and augmented reality laboratory where you can get acquainted with technology, gain knowledge or access to AR/VR project development equipment.

sensoramalab.com
team@sensoramalab.com

03

DIY Lab

A workshop with state-of-the-art equipment for making and prototyping (3D printers, vacuum presses, robot designers, etc.), as well as the space for workshops and a place where expert appraisals of a hardware project can be obtained and included in the accelerated program.

kiev.diylab.org
hello@diylab.org

04

Syngenta

Digital Innovation Lab became sixth in the global network of LTI Syngenta. The laboratory's activities are aimed at providing digital innovations to Ukrainian agricultural producers, as well as serving agribusiness needs in other European countries.

syngenta.ua

05

ARTKB

A full-cycle hardware product development bureau (idea inception, mass production, design, certification and worldwide logistics).

The bureau created HushMe – a personal headset that makes the conversation inaudible to those who are around the user. In 2017, the project raised $170,000 on crowdfunding platforms.

In 2018, the model was showcased at the International Consumer Electronics Show (CES).
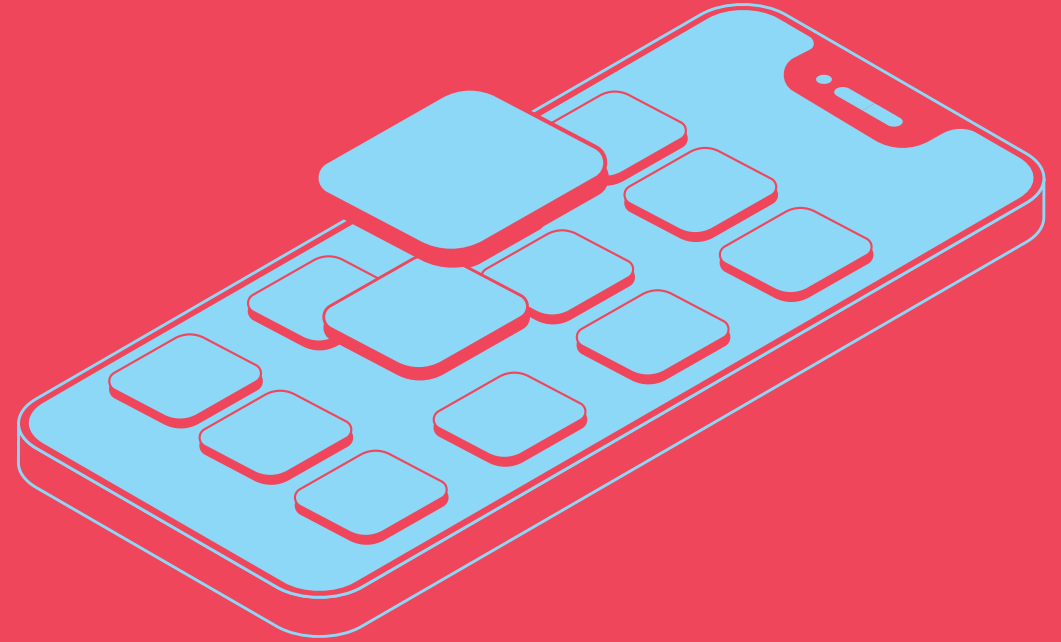
info@artkb.net
artkb.net

05

PRODUCT COMPANIES

SUCCESSFUL PRODUCT COMPANIES
DEPOSITPHOTOS

01

depositphotos

more than
400
employees

50
languages

$8M
from
TMT Investment,
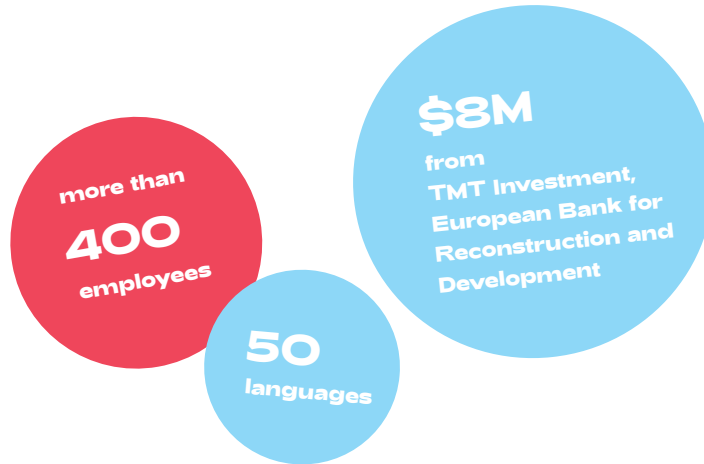European Bank for
Reconstruction and
Development

Year founded: 2009
Photobank

Founder: Dmytro Sergeev
CEO: Vadym Nehay

Depositphotos is one of the leaders of the Ukrainian tech industry. A serial entrepreneur Dmitry Sergeev founded the company in 2009.

The first four years, Depositphotos developed one product – a photobank with a microstock model, where photos, graphics, and videos from contributors from all over the world are distributed under the Royalty-free license; content contributors earn from each license purchase and the photobank earns its commission from each purchase.

In 2011, Depositphotos received $3M investments from TMT Investments.

In 2015, the European Bank of Reconstruction and Development together with TMT Investments invested in the company $5M more. Today, Depositphotos is an ecosystem consisting of several products, which complement each other. More than 400 employees work with clients from 192 countries of the world.

Depositphotos' head office, where the most employees work is located in Kyiv and the headquarters is situated in New York.

depositphotos.com

Products

depositphotos

Depositphotos

A commercial platform that brings authors of high-quality licensed stock photos, graphics, vectors and videos together with buyers of content from all over the world. The photobank offers over 90M images and 4M videos.

depositphotos.com

Lightfield PRODUCTIONS

Lightfield.Productions

Production studio and a creative space in Kyiv, the largest photo studio in Ukraine and one of the largest studios in Europe. 15 shooting stages located over an area of 2,500 m^2. The Studio's clients include H&M, Pepsi, Canon, Vodafone, Cosmopolitan, Porsche, Nestle, Elle.

lightfield.ua

CRELLO

Crello

The product was developed by Depositphotos team and launched in June, 2017. This is an interactive online graphic tool that allows users to create visuals in 36 different formats, including animated videos, visuals for social networks and advertising, multipage presentations, and print materials.

Crello offers over 12,000 free templates and a lot of free content such as photos, badges, patterns, vectors, frames, shapes, and illustrations.

crello.com

BIRD IN FLIGHT

Bird in Flight

Online magazine on photography and visual culture.

birdinflight.com

WAS

WAS

Popular media on history, which constantly looks for an out-of-the-box and unhacked presentation formats.

was.media

SUCCESSFUL PRODUCT COMPANIES

Company valuation $1.1B

Snapchat $150M

6.9M users a day

100M apps downloaded

$14M of investments

Google $30-45M

GitLab

Year founded: 2011

Git repository management

Opensource system for hosting git repositories raised $110M in a series D round in 2018.

Iconiq Capital led the round, with participation from GV, Khosla Ventures and Goldman Sachs. According to the platform founders, the company's valuation within the round amounted to $1.1B, making GitLab the first Ukrainian "unicorn". More than 100,000 companies use GitLab, including Ticketmaster, ING, NASDAQ, Sony, VMWare, and Intel.

gitlab.com

Looksery

Year founded: 2013

The software that allows you to apply filters to faces in photos and videos

The startup has developed a mobile app that uses AI to apply filters to faces while shooting photos and videos.

In 2014, Looksery raised $46,000 in the Kickstarter campaign, which exceeded the funding target by 50%. In 2015, it was acquired by Snapchat for $150M. The Looksery software became a part of this social media platform.

Grammarly

Year founded: 2009

Intelligent online text quality checking service

Grammarly checks spelling and gives tips on correcting grammar and improving stylistics and structure of the written content using a machine learning technology.

Until 2015, the service was only available by subscription ($30 per month). Currently, the service is free, but a paid version with advanced options is available. In 2017, Grammarly raised $110M of its first investment, which was a record for Ukraine at the time. At present, its audience is 6.9M active users every day.

grammarly.com

Readdle

Year founded: 2007

Software for macOS and iOS

This Ukrainian company from Odesa was one of the first to begin developing apps for the iPhone even before the creation of the App Store.

Readdle started with a service for reading books and documents in Safari. Now an audience of their services is 90M users.

readdle.com

Jooble

Year founded: 2007

Job search service

It is in the top 5 largest job search services in the world, and boasts a daily audience of 2M visitors. It operates in 61 countries.

jooble.org

2M visitors a day

Petcube

Year founded: 2012

Smart gadgets for pets

As a matter of fact Petcube created the whole category of smart devices for a remote pet monitoring and took there the largest share.

Currently, the company's portfolio includes three models that sold in 2,500 U.S. brick and mortar stores and on Amazon; they can be purchased in many countries around the world. In 2017 startup acquired canadian Petbot company as well attracted $10M of investment.

petcube.com

Viewdle

Year founded: 2006

Face recognition technology and video processing

When this startup was launched, its technology was the first one that made it possible to identify a person without physical contact.

In 2012, Viewdle became the first Ukrainian company acquired by Google, which paid $30 to 45M for the project according to expert estimates. In 2014, the startup was closed and its specialists were transferred to Google. Most of them started working at Motorola Mobility division of Google.

09 MacPaw

Year founded: 2008

Software for macOS

Facebook 1,000+ licenses

MacPaw created CleanMyMac app, which boasts a million-wide audience in the world, as well as many other services for macOS. The company's customers include Facebook, which purchased thousands of licenses for its employees. MacPaw software periodically appears on the first page of the Mac App Store ranking.

macpaw.com

10 CONCEPTER Concepter

KICKSTARTER $250,000

Year founded: 2013

Smartphone accessories

IBlazr mobile flash developer. Company's gadgets are sold in 40 countries around the world, including branded Apple stores. Concepter was first Ukrainian startup that appeared there. In 2017 Concepter opened the division of consulting for start-ups and launched accelerator program.

concepter.co

11 TemplateMonster Template Monster

5M visitors per month

Year founded: 2012

Website solutions

Template Monster is in the top 3 of global vendors for web development solutions. The company develops templates for popular content management systems (WordPress, Drupal, Joomla, etc.) and e-commerce platforms (Magento, Shopify, osCommerce, and many more), as well as HTML5 and Bootstrap templates, corporate style elements, etc. Its monthly audience totals 5M visitors from all over the world.

templatemonster.com

12 Preply

$5.5M of investments

Preply

Year founded: 2012

An online platform that brings together tutors and students

Preply is an online platform that connects students with language tutors. The system uses machine learning to rank candidates and acts as a guarantor of financial transactions between the parties.

The service operates in Ukraine, as well as in several European and Latin American countries.

In the past two years Preply raised $5.5M from several investors, funds and the TechStars accelerator.

preply.com
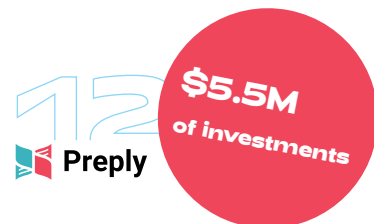
13 Terrasoft

Terrasoft

Year founded: 2002

BPM and CRM systems

Terrasoft is a group of companies that develops corporate software, offers IT consulting, CRM implementation and enterprise automation services. Terrasoft's customers include thousands of companies around the world: OTP Bank, Kraft Heinz, OKI, Bayer CropScience, etc.

terrasoft.ua

14 GENESIS

150M users per month

Genesis

Year founded: 2009

Online media, e-commerce

It is one of Ukraine's largest IT product companies (800 full-time employees) operating in the markets of African and Asian countries, as well as the USA and Europe. In the autumn of 2018 the company has launched an investment fund for projects in media, mobile software development, AI and healthcare.

gen.tech

15 EVO

$100M trade turnover
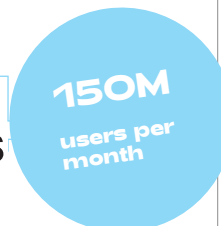
EVO

Year founded: 2008

Marketplaces

A group of companies operating in several CIS countries. The monthly audience of marketplaces totals 121M users; the turnover reaches almost $100M.

The EVO marketplace group includes such projects as Prom.ua, Satu.kz, Deal.by, Bigl.ua, Zakupki.prom.ua, Kabanchik.ua, Kabanchik.by, MegaMaster.kz, Crafta.ua, and Vchasno.com.ua. The company merged with Rozetka in summer 2018.

evo.company

16 competera

Competera

Year founded: 2014

SaaS platform for e-commerce

Competera has two major products: competitors' activity analytics platform and price optimization service. Competera has more than 120 corporate clients from 26 countries, including: OBI, Deloitte, Acer, LG, Watsons, Panasonic and others. Competera offices are located in three countries around the world.

competera.net

17 ZEO ALLIANCE

ZeoAlliance

Year founded: 2010

Software for macOS

ZeoAlliance comprises several popular projects, including: ZeoBIT, which developed Mackeeper, an application to optimize macOS, and Zoomsupport, a 24/7 support service.

zeoalliance.com

18

AJAX

Ajax Systems

Year founded: 2011

Wireless security systems and smart homes

Ajax creates smart security systems and devices for smart home. Ajax's portfolio includes 17 security gadgets that are in high demand in dozens of countries in Europe, the CIS, Asia, and South America as a high-quality alternative to expensive brands. The production is based in Ukraine.

In 2015, the startup raised $1M of investment. Currently, approximately 100,000 units of products are manufactured each month.

ajax.systems

100,000 devices per month

19

Kodisoft

Kodisoft

Year founded: 2002

Interactive tables for public institutions (including restaurants)

Over the course of 16 years of its existence, the company changed several areas of activity, which were all were related to IT. Currently, interactive tables for restaurants and other public institutions are the most famous products of Kodisoft.

kodisoft.com

20

Paymentwall

Paymentwall

Year founded: 2010

Payment services

Payment wall's portfolio includes several financial projects operating in different countries and performing functions ranging from processing to a gateway for merchant accounts (Brick, PayAlto, SpiderPipe, Offerwall, and others).

paymentwall.com

21

YOUSCAN

Clients
Google Coca-Cola
SAMSUNG

YouScan

Year founded: 2009

Social media monitoring system

YouScan is a service for marketing specialists, PR professionals and anyone who wants to know what consumers think about their products. It scans reviews in social media, blogs and forums, and presents results in the form of convenient reports.

Customers of the service include Google, Yandex, Coca Cola, Nestlé, Samsung, and others.

youscan.io

PROMISING STARTUPS

01

people.ai

$37M investments

People AI

Year founded: 2016

Sales department management and control platform

People.ai analyses the activity of sales managers based on CRM records and communication with clients in messengers and e-mail. In 2016, the startup raised $450,000 in the angel investment round and an investment from Garage Technology Ventures. During the first two years of operation, People.ai got into Y Combinator, became #1 in the B2B segment among residents of the accelerator, raised another $37M investment, and got its first customers.

people.ai

02

monobank

Monobank

Year founded: 2017

Mobile Bank without offices

This bank is the first in Ukraine and one of the first in Europe mobile banks to work completely without physical branches. More than 500,000 customers signed up in Ukraine within the first year of its operation. Currently the team is planning to enter the UK market.

monobank.com.ua

700,000 clients in Ukraine

03

allset

$8.5M investments

Allset

Year founded: 2015

Table booking and food ordering app

Allset is a restaurant reservation and pre-ordering service that allows clients and venues to reduce waiting time. The app is free for end users, but the company takes a 10% commission off the venues.

The company operates in more than 1,500 locations in 11 US cities and serves about 25,000 orders a month. In 2016 and 2017, the startup raised $3.5M and $5M of investment, respectively.

allsetnow.com

SolarGaps

Solar Gaps

Year founded: 2016

The world's first smart blinds collecting solar energy

SolarGaps smart blinds use a window area for green energy accumulation, decreasing electricity bills and reducing CO_2 emissions. For two years of its existence, the project raised $700,000 of investment from the European Union, the European Bank for Reconstruction and Development, AVentures, Effective investments, an angel investor, HAX Accelerator, IoT Hub and through successful Kickstarter and Indiegogo campaigns. The project currently boasts $175,000 of upfront sales in the B2C segment and $5M in the B2B segment, as well as of distribution contracts in 30 countries.

solargaps.com

$700,000 of investments

KWAMBIO

Kwambio

Year founded: 2014

3D printing

Kwambio is an additive manufacturing company and a developer of unique products with implementations in a variety of fields.

kwambio.com

$1.6M of investments

HACKEN

Hacken

Year founded: 2017

Cybersecurity ecosystem project

In 2017, the startup raised $4M in ICO, and attracted John McAfee and Steve Wozniak to participate in the bug tracking marathon as advisers.

hacken.io

ICO $4M

Dmarket

Dmarket

Year founded: 2017

Blockchain marketplace for gamers

Dmarket is a blockchain-based marketplace that enables gamers to convert their gaming achievements into real money. In 2017 the startup has raised $25M through an ICO.

dmarket.io

ICO $25M

HIDEEZ

Hideez

Year founded: 2015

Identity and access management solutions

Hideez has several products in its portfolio: Key, Lock, Wallet and Enterprise Server.

hideez.com

DELFAST

Delfast

Year founded: 2017

Manufacture of electric bicycles

The Ukrainian electric bicycle Delfast was launched on Kickstarter crowdfunding platform in 2017. An unprecedented range on a single charge is the peculiarity of this model. Delfast traveled 367 km on a single charge and was registered in the Guinness Book of Records.

delfastbikes.com

youTEAM

YouTeam

Year founded: 2017

Marketplace

YouTeam is a marketplace for assembling offshore software development teams. They are the fourth Ukrainian company that had participated in the prestigious Y Combinator acceleration program in the United States. The platform connects a global pool of vetted software development providers with startups and SMEs setting up or scaling their remote software development teams.

youteam.io

Dom.ai

PassivDom

Year founded: 2016

Off-the-grid energy-efficient houses

PassivDom founders intended to create a fully off-the-grid house that you can print on a 3D printer by yourself and that does not need connections to centralized electricity and water supply networks. Currently, the startup builds such houses at prices starting at $64,000.

passivdom.com

Distributed Lab

Distributed Lab

Year founded: 2014

Blockchain technology competence centre

Distributed Lab is engaged in blockchain-based projects and in the organization of events and training specialists in this field. The project team includes developers, researchers, and analysts.

distributedlab.com

Cardiomo

Cardiomo Care

Year founded: 2014

Smart heart condition monitoring gadget

Cardiomo tracks the heart rate 24/7 and sends geolocation-tied alerts to contact phone numbers in case of problems. In 2016, the project entered the final of New York Starta Accelerator program, and raised $130,000 from Starta Accelerator for 7% of the stock.

cardiomo.com

INFLU2

Influ2

Year founded: 2017

Advertisement microtargeting solution

The project was founded in the summer of 2017. In Autumn 2017, it raised $1.4M of angel investment and was presented at TechCrunch Disrupt. In May 2018, it was launched in open access.

influ2.com

$190,000 of investments

06

IT SERVICE COMPANIES

UKRAINE IN THE GLOBAL IT MARKET

1st
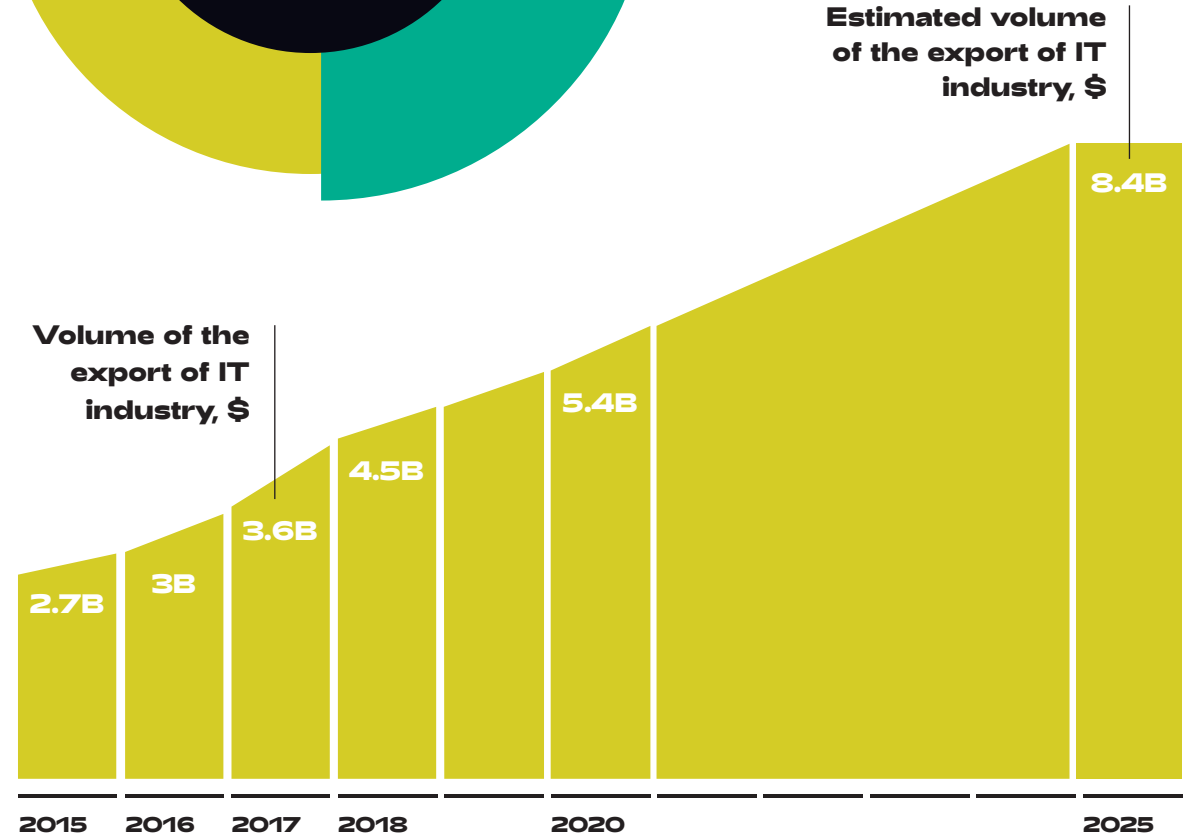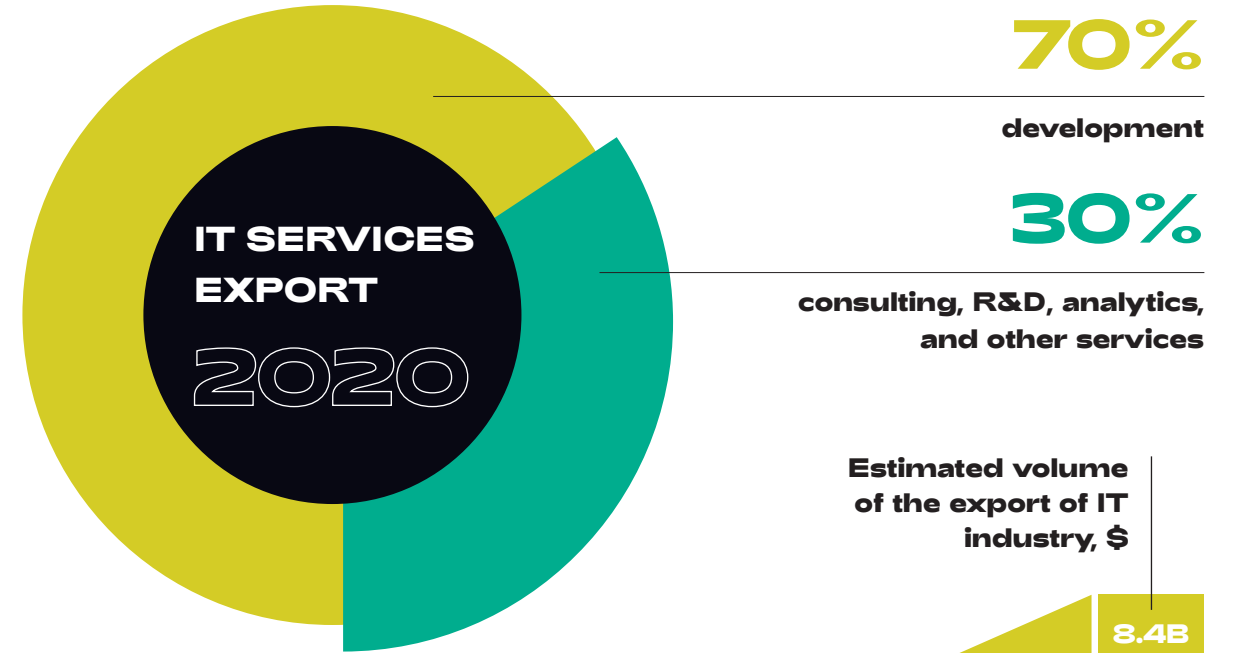**place in Europe in terms of the volume of IT service exports[19]**

24th
place among the 55 most attractive countries[20]

11th
place in the top 50 world's developers[21]

7th
place in the world in terms of quality and efficiency of the freelance workforce

IT SERVICES EXPORT 2020

70%
development

30%
consulting, R&D, analytics, and other services

Estimated volume of the export of IT industry, $

Volume of the export of IT industry, $

2.7B   3B   3.6B   4.5B   5.4B   8.4B

2015   2016   2017   2018   2020   2025

UKRAINE ON IT MARKET

IAOP
Collaboration at the Core.

The 2018 Global Outsourcing-100 global ranking includes

18

Ukrainian IT companies and companies with offices in Ukraine

Currently, the largest Ukrainian IT companies have gone beyond outsourcing in its classic sense and offer consulting, grow their own expertise, and open R&D centers instead.

01

sigma
Software

SIGMA SOFTWARE

Sigma Software provides cutting-edge technology solutions and consulting within IT. We deliver smartest solutions for over 16 years to our customers in the areas of government, telecommunications, advertising, automotive, gaming, and others.

Being a part of Sigma Group, one of the largest scandinavian IT corporations, we are a global player with more than 3,700 employees in 12 countries and over 950 in Ukraine.

sigma.software

Our principles

No matter what project we undertake, our principles remain the same: we make sure you get the solution that is the best for you, on time, and on budget. And we always deliver on our promises.

Our mission

Provide premier value IT services, keeping the focus on helping our customers to reach their business goals.

Company is complained to

ISO 9001:2001
Quality Management System

ISO 27001
Information Security Management

R&D   **In 2017 R&D center with three regional hubs was established.**

CSR   **Sigma Software has a big idea in its mind: creating a strong and stable environment for IT development in Ukraine due to work with government, improving education, promoting the country as a huge IT hub.**

Sigma Sowtware is listed **among Top-100 best outsorcing companies** in the world according to the International Association of Outsourcing Professionals.

SOFTSERVE

O2 softserve

SoftServe is a global digital authority and consulting company, operating at the cutting edge of technology. We reveal, transform, accelerate, and optimize the way large enterprises and software companies do business. With expertise across healthcare, retail, financial services, software, and more, we implement end-to-end solutions to deliver the innovation, quality, and speed that our clients' users expect.

SoftServe was founded as a software development company in 1993 in Lviv, Ukraine. Today company operates in 30 cities in the USA, EU, Ukraine, Bulgaria and Poland.

info@softserveinc.com
softserveinc.com

70
Net Promoter Score

30
global offices

30%
Organic CAGR YoY

5,500+
associates

Clients

Cisco, Atlassian, Bazaarvoice, Deutsche Bank, Nordea, Liebherr, Logitech, IBM, Panasonic, Cloudera

Key technologies and practice areas

- Experience Design
- Internet of Things
- Big Data
- AI/ML
- Cybersecurity
- Cloud/DevOps
- Digital Experience Platforms
- Mixed Reality
- Blockchain
- Robotics

Ultimately, SoftServe empowers businesses to re-identify their differentiation, accelerate market position, and vigorously compete in today's digital, global economy.

03

EPAM

Offices in Ukraine: Kyiv, Kharkiv, Lviv, Dnipro, Vinnytsia

5,700 specialists

Software development in finance, media, sales, healthcare, energy, insurance, etc.

Customers:
Fidor Bank, Barclay's, Canadian Tires and others.

epam.com
info@epam.com

04

Luxoft

Offices in Ukraine: Kyiv, Dnipro, Odesa

More than 3,900 specialists in Ukraine

Software development in telecommunications, car manufacturing, healthcare, etc.

Customers:
Deutsche Bank, UBS, Dell, Sabre and others.

luxoft.com
ir@luxoft.com

$2B evaluation

05

GlobalLogic

Offices in Ukraine: Kyiv, Kharkiv, Lviv, Mykolayiv

More than 3,600 specialists in Ukraine

Full cycle software development in retail, multimedia and communications services, medical technology, automotive industry, etc.

Customers:
Fox, Oracle, Zappos, Adobe, Panasonic and others.

globallogic.com
prmarketing-ua@globallogic.com

06

Ciklum

Offices in Ukraine: Kyiv, Kharkiv, Lviv, Dnipro, Odesa, Vinnytsia

More than 2,600 specialists

Software development in retail, fintech, media, tourism, entertainment industry, etc.

Customers:
Google, Intel, Jabra, Thomas Cook, Lenovo and others.

ciklum.com
ciklum@ciklum.com

07

N-iX

Offices in Ukraine: Lviv, Kyiv

More than 1,600 specialists.

Software and mobile apps development in telecom, fintech, media, energy, aviation, education, etc.

Customers:
Deutsche Post, Opentext, Delaware, Photon and others.

n-ix.com
contact@n-ix.com

08

Infopulse

Offices in Ukraine: Kyiv, Kharkiv, Lviv, Odesa, Vinnytsia, Zhytomyr, Chernihiv

More than 1,750 specialists

Development and providing of services for the entire life cycle of IT systems in telecom, automotive industry, insurance, etc.

Customers:
Bosch, Microsoft, Vodafone, British American Tobacco and others.

infopulse.com
info@infopulse.com

Clients: Bosch, Microsoft, Vodafone

09

ELEKS

Offices in Ukraine: Kyiv, Lviv, Ivano-Frankivsk, Ternopil

More than 1,100 specialists

Software development, consulting services, and quality assurance in retail, fintech, logistics, media, etc.

Customers:
Autodesk, Phoenix, Xceedium, Havas and others.

eleks.com
eleksinfo@eleks.com

10

Intellias

Offices in Ukraine: Kyiv, Odesa, Lviv

More than 1,000 specialists

Software development in automotive industry, SaaS, big data and data science.

Customers:
Nokia, Microsoft, Siemens, Playbuzz and others.

intellias.ua
info@intellias.com

Clients: Siemens, Philips, Fujitsu, Samsung

11

Miratech

Offices in Ukraine: Kyiv, Kharkiv, Vinnytsia

More than 800 employees

Software development in telecom, insurance, tourism, banking sector, healthcare, etc.

Customers:
Siemens, Philips, Fujitsu, Samsung, BNP Paribas and others.

miratechgroup.com
info@miratechgroup.com

12

Innovecs

Offices in Ukraine: Kyiv, Myko-layiv

More than 500 specialists

Software development in block-chain, advertising and market-ing, healthcare, fintech, educa-tion, telecom, etc.

Customers:
Zinga, edX, Wagner Brothers, Neogames and others.

innovecs.com

Clients:
Digimation,
Hopster, GSN,
Pixomondo,
Wargaming

14

Program-Ace

Offices in Ukraine: Kyiv, Kharkiv

More than 100 specialists

Software development in agri-culture, media, entertainment, education, marketing and adver-tising, fintech, health, insurance, etc.

Customers:
Digimation, Hopster, GSN Games, Wargaming and others.

program-ace.com
rfp@program-ace.com

13

AMC Bridge

Offices in Ukraine: Dnipro, Khmelnytskyi, Sumy, Chernivtsi

More than 450 specialists

Software development in architecture, engineering and construction.

Customers:
Amadeus, AMD, aPriory, Albi-tech and others.

amcbridge.com
contacts@amcbridge.com.ua

15

TEAM International Services

Offices in Ukraine: Kyiv, Kharkiv, Lviv

More than 300 specialists

Software development in health-care, telecom, media, finance, retail, etc.

Customers:
Bond, Telenor, iTEAM Network, ITC and others.

teaminternational.com
sales@teaminternational.com

16

Itera

Offices in Ukraine: Kyiv

More than 150 specialists

Business solutions development in fintech, e-commerce, retail, etc.

Customers:
Santander, Storebrand, Viams and others.

itera.no

17

Softengi

Offices in Ukraine: Kyiv, Kharkiv, Chernihiv, Zhytomyr

More than 200 specialists

Software development and test-ing in finance, telecom, ecology, renewable energy, aviation, transport and logistics, health-care, etc.

Customers:
Bank of Georgia, Enviance, Iner-soll Rand, AZIOT, Zeppelin CAT and others.

softengi.com

Clients:
Bank of Georgia,
AZIOT,
Zeppelin CAT

18

Softjourn

Offices in Ukraine:
Ivano-Frankivsk

More than 100 employees

Web and mobile software devel-opment in media, fintech, etc.

Customers:
Janam, InTix, FutureTix, Boca Systems, Ukrainian Processing Center and others.

softjourn.com
info@softjourn.com

Clients:
Janam, InTix,
Boca Systems,
PayPartners

19

Svitla Systems

Offices in Ukraine: Kyiv, Kharkiv, Lviv, Chernivtsi, Cherkasy

More than 500 specialists

Development and testing of soft-ware in various industries.

Clients:
InvoiceASAP, Inflection, Stanford

svitla.com

20

Artezio

Offices in Ukraine: Kharkiv

More than 300 employees

Corporate application and soft-ware development in finance and insurance, telecom, healthcare, etc.

Customers:
Swisscom, Beeline, Siemens and others.

artezio.ru

Clients:
Swisscom,
Siemens,
Philip Morris
International

21

DataArt

Offices in Ukraine: Kyiv, Kharkiv, Lviv, Dnipro, Odesa, Kherson

1,200 specialists in Ukraine

Design, modernization and support of IT solutions in finance, healthcare,tourism, media and the internet of things.

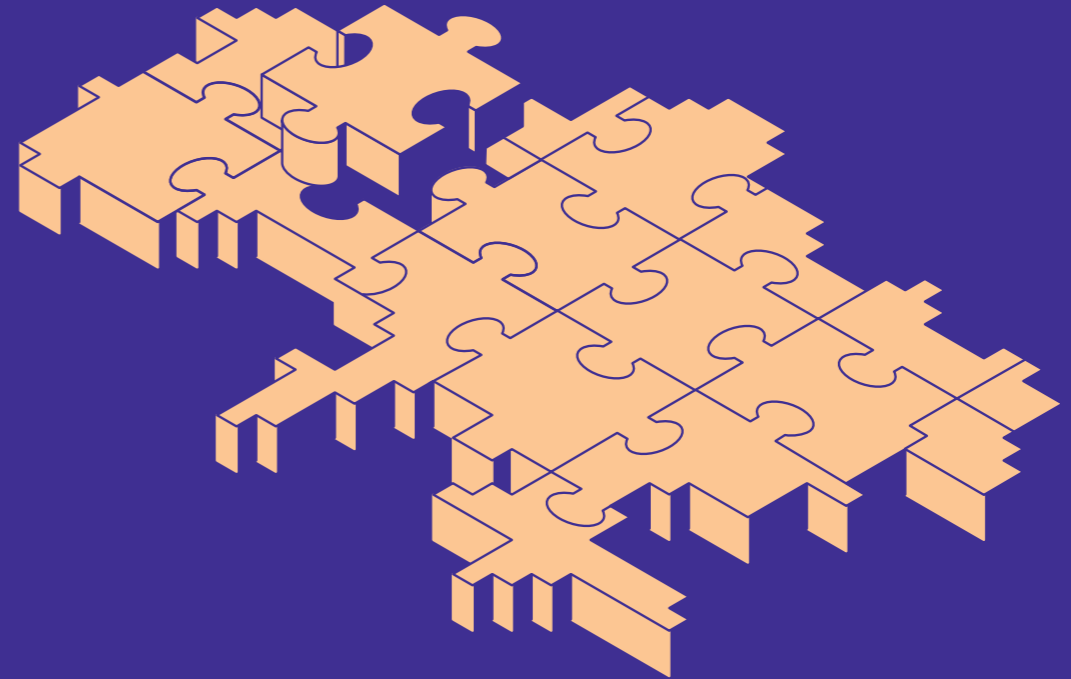**Customers:**
BNP Paribas, IPM, Nielsen and others.

dataart.ua

07

PUBLIC SECTOR

∕ **STATE LEVEL PROJECTS AND INSTITUTIONS**

∕ **CITY LEVEL PROJECTS AND INSTITUTIONS**

STATE LEVEL PROJECTS AND INSTITUTIONS

Ukraine has a separate executive body in charge of implementation of the digital strategy of the Cabinet of Ministers for Ukraine's development:

The State Agency for E-Governance of Ukraine.

In addition, there is a union that coordinates the needs of industry and government experts in implementing reforms. Moreover, in May 2018, the Ministry of Economic Development announced

a course to support startups at the level of the public policy.

01 UkraineInvest

UkraineInvest

The project of the Cabinet of Ministers of Ukraine on investment opportunities of the state contains all key economic indicators, detailed information on opportunities in each of the branches and background information on establishing a business in the country, in particular, visa issues, information about company registration procedures, etc.

ukraineinvest.com

02 SFII

The State Finance Institution for Innovations (SFII)

SFII provides financial support and attracts domestic and foreign investments for the development of the real sector of the economy and support of innovative projects of companies of different forms of ownership through co-investing or consortium lending together with international investment and credit funds.

difku.gov.ua
office@sfii.gov.ua

03

The State Agency for E-Governance of Ukraine

It is the central executive body that embodies the strategic vector of the Cabinet of Ministers in the field of e-governance, informatization and development of the information society in Ukraine. The agency was established in 2014.

Key areas of activities:

- development and implementation of electronic services and electronic document flow;
- introduction of e-democracy and e-identification;
- implementation of the National Informatization Program;
- opening of data;
- stimulation of the development of the digital economy;
- implementation of electronic interactions of registries and maintenance of registry ledgers;
- development of the gov.ua national portal.

The projects of the Agency include the implementation of MobileID identification system, Trembita registry interaction system, digitization of a number of registries, and the introduction of the blockchain technology into the Land Cadastre of Ukraine.

e.gov.ua
agency@e.gov.ua

04 Hi-Tech Office

The agency was established in 2016 by EPAM, Vodafone Ukraine, Mastercard, and Kyivstar. Its purpose is to ensure the interaction between the state and business (as the Hi-Tech Office's Supervisory Board includes representatives of the Ministry of Economic Development and Trade, the Verkhovna Rada, and the Presidential Administration), support for startups and major infrastructure projects, and legislative support for the development of the innovative component of the economy.

ht-office.org
office@ht-office.org

05 ProZorro

ProZorro is a tender procurement system for state and public companies, which was created by volunteers and transferred to the state in 2015. Since August 1, 2016 ProZorro became mandatory for use throughout the country. Within a few years of operation, the system received several industry awards, including the international anticorruption award from the C5 Accelerate and the US Institute of Peace (2018) and the Trust of the Future at the Davos Awards. In 2018, Wired dedicated a long article to ProZorro, in which the system was called the most transparent system in the world. According to the publication, the system holds 1,500 auctions per day today and accounts for saving for the state budget in the amount of 1.4% of country's GDP.

prozorro.gov.ua
feedback@prozorro.ua

06 Ukrainian National Startup Fund (UNSF)

The UNSF was established in Autumn 2018. The fund plans to invest $2M into Ukrainian startups during its first year of operation. The fund will finance startups in pre-seed and seed rounds, that already have an MVP, a business plan and a team. The Fund will focus on companies operating in the areas of Internet of Things, blockchain, artificial intelligence, FinTech, biotechnology and medicine, cybersecurity, defence, and energy industries. The National Fund will be providing from $25,000 to $75,000 in the form of grants. In addition to monetary support, the UNSF will provide training and mentoring support, as well as assistance with publicity and marketing. The Fund will also work on attracting private investors interested in investing in projects that have been already funded by the state.

07 The National Commission for the State Regulation of Communications and Informatization (NCSRCI)

It is the state collegiate body under the President of Ukraine that carries out state regulation in telecommunications, informatization, and use of radio frequency resources and provision of postal services.

nkrzi.gov.ua
e_zvernen@nkrzi.gov.ua

CITY LEVEL PROJECTS AND INSTITUTIONS

01 Kyiv Smart City

The initiative by the city of Kyiv, which brings together residents, businesses and authorities of Kyiv for the development of smart urban infrastructure. It is based on the principles of intelligent and transparent management and transformation of Kyiv into an innovative and progressive city. The Initiative includes an accelerator and a hub for urban development projects.

kyivsmartcity.com
team@kyivsmartcity.com

02 Smart City Lviv

In 2015, Lviv City Council announced a course on innovation in the city through the use of the smart city approach and tools. Implementation of innovations involves cooperation between the authorities, public services, citizens, and business representatives.

fb.com/lviv.smart.city

03 Dnipro Development Agency

The Dnipro Development Agency was established by the decision of the Dnipro City Council and is engaged in developing the city's infrastructure and increasing its attractiveness for investors. The projects of the Agency include a science and technology park named "Academia", and another industrial park. Also, the Dnipro – Smart City taskforce was created on its base. The taskforce is involved in the implementation of "smart city" projects.

dda.dp.ua
info@dda.dp.ua

04 Smart City Kharkiv

Smart City Kharkiv is an image project of Kharkiv within the framework of the Invest Kharkiv Project, which promotes the introduction of innovations in the city.

invest.kh.ua
invest_molod@city.kharkov.ua

08

CORPORATIONS INVESTING IN STARTUPS

01 Myronivsky Hliboproduct (MHP)

It is one of the largest agribusiness complexes in Ukraine. The complex includes about 20 enterprises that create a closed cycle of production of chicken meat products; the company has about 50% share of the Ukrainian market and exports its products to 70 countries.

The MHP structure includes a department responsible for the implementation of innovations. In addition to that, according to Forbes, this agricultural company became one of the first in Ukraine in its sector to introduce a geoinformation system for land bank management. In 2017, MHP and Radar Tech launched MHP Accelerator for startups engaged in agrarian innovation.

mhp.com.ua
office@mhp.com.ua

02 Ukroboronprom

A state concern that includes more than 100 enterprises of defence industry and design offices. In 2017, Ukroboronprom jointly with 1991 Open Data Incubator, Cyber Guard, and Hacken blockchain project launched an accelerating program for cybersecurity. In 2018, the state concern became a partner of Ukrinnovate incubation agency engaged in defence projects.

ukroboronprom.com.ua
kanc@ukroboronprom.com

03 DTEK

DTEK is the largest energy holding in Ukraine, which includes companies producing coal and natural gas, generating electricity, supplying heat and electricity and providing related services to end users.

In 2018, jointly with Radar Tech, the company launched the Energy Accelerator for energy projects that supports startups, companies, and teams that offer solutions for business needs in this industry.

dtek.com
info@dtek.com

04 Kyivstar

Kyivstar is the largest mobile operator in Ukraine and one of the largest fixed-line Internet service providers and digital service providers.

Using the facilities of the Radar Tech accelerator, the company supports projects in a telecommunication accelerator, in particular in the fields of client interactions, public sector, FinTech, smart home, B2B, and over-the-top content. Also, the operator opened its own free training courses for working with big data.

kyivstar.ua
m.me/kyivstar

05 UKRSIBBANK BNP Paribas Group

UKRSIBBANK BNP Paribas Group is in the top 10 largest Ukrainian banks. Using the Radar Tech facilities, the bank launched the POPCORP accelerator program to search, develop and integrate innovation in the banking sector.

ukrsibbank.com
info@ukrsibbank.com

06 Mastercard Ukraine

One of the largest international payment systems, which supports acceleration and incubation programs, as well as FinTech events and startups in Ukraine. In 2017, the company launched the FINTECH MASTER incubation program together with the 1991 Incubator and invested in the MAWI Pay smart bracelet together with PrivatBank. Together with Oschadbank, the company introduced contactless payment system for public transport.

mastercard.ua
m.me/MastercardUkraine

07 Oschadbank

A state-owned bank and one of the largest banks in Ukraine. Jointly with Mastercard, it introduced a system of contactless payment in public transport and at social facilities.

In 2017, the bank launched its Build Your Own business development program, which includes consulting and mentoring in addition to special tariffs for businesses. The bank plans to reach 2M participants.

oschadbank.ua
contact-centre@oschadbank.ua

08 Raiffeisen Bank Aval

Raiffeisen Bank Aval is one of the largest banks in Ukraine. In 2017 the bank launched the Raiffeisen Digital HUB division, which is engaged in introduction and improvement of digital products. In particular, it deals with the generation of ideas for new solutions or the integration of the experience of the parent group.

aval.ua
info@aval.ua

09 Alfa-Bank Ukraine

In 2017, Alfa-Bank Ukraine opened the Alfa-Digital division with a full-cycle team working on mobile app, Internet banking and e-commerce. At the end of the year, it launched a digital bank projects competition together with reactor.ua.

alfabank.ua
ccd@alfabank.kiev.ua

10 OTP Bank Ukraine

OTP Bank is in the Top 20 largest banks in Ukraine and is part of OTP Bank Group, which is one of the largest financial institutions in Central and Eastern Europe. Together with the 1991 Open Data Incubator and the NBU, the bank launched the Open Banking Lab incubation program. This program promotes the concept of open banking and access to open (non-confidential) banking data through the API.

otpbank.com.ua
call.operator@otpbank.com.ua

11 Vodafone Ukraine

Vodafone is the second largest mobile operator of Ukraine in terms of the subscriber base. The company develops digital services and services for the state and business based on big data. In 2017, the carrier launched the Big Data Lab for IT specialists, managers of various levels, analysts, marketers, etc.

vodafone.ua
m.me/VFUkraine

CREATED BY THE INITIATIVE

GUIDE PARTNERS

UNIT.City

Western NIS Enterprise Fund

SIGMA Software

softserve

O₂IT
OUTSOURCING TO IT

depositphotos

GUIDE INFO AND MEDIA PARTNERS

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[17] According to **The DealBook of Ukraine 2018** by AVentures Capital

[18] According to **Ukraine's role & perception in the Global IT market** by Chirag Ravat Associate Director, Avasant

[19] **IT UKRAINE. IT services and software R&D in Europe's rising tech nation** by AVentures Capital та Ukraine Digital News

[20] According to **Ukraine's role & perception in the Global IT market** by Chirag Ravat Associate Director, Avasant

[21] According to **HackerRank**

All the other data was taken from the open sources.

THE PROJECT WAS MADE BY: