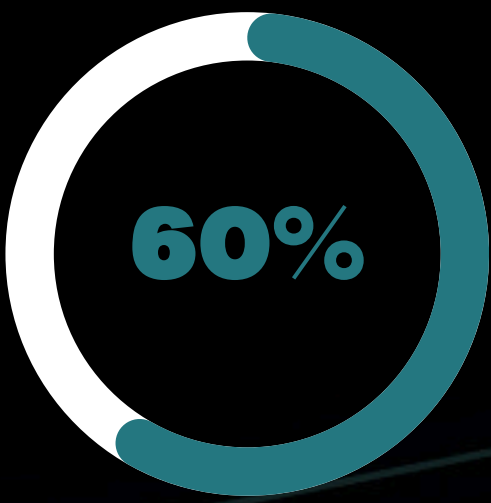


DEEP TECH

BREAKTHROUGH TECHNOLOGIES OF THE NEXT DECADE

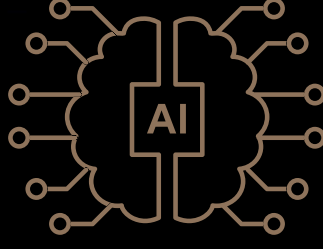


European Deep Tech startups raised \$17.7B in 2022, 22% less than 2021 total, but still +60% more than 2020.

Next Frontier AI, Future Computing, Novel Energy and Space Tech raised \$4.4B in 2022. This is their highest total ever and double the amount of 2020.*

NEXT FRONTIER AI

- AI-First Biology
- Autonomous Driving
- Generative AI
- AI-Programming
- No/Low Code Software
- New AI/ML Tech Stack
- Speech Recognition
- Conversational AI
- Privacy-Preserving AI

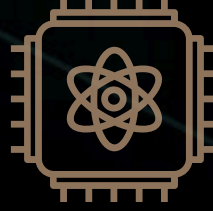


- Explainable AI
- Neuromorphic Advanced AI Computing Chips
- Generative Design
- AI-Aided Engineering
- Quantum Chemistry
- AI for Chemical and Biotech Fields



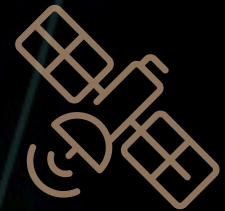
NOVEL ENERGY

- Hydrogen
- Nuclear Fission
- New Battery Chemistries & Supercapacitors
- Grid Scale Energy Storage
- Nuclear Fusion



FUTURE COMPUTING

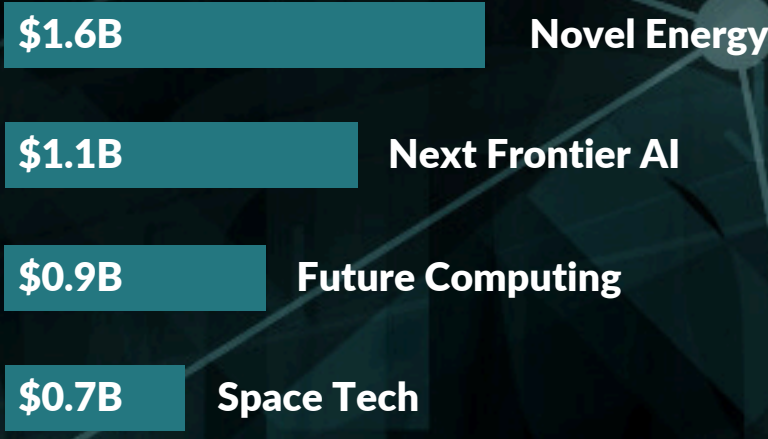
- AR & VR
- Quantum Computers
- Photonic Integrated Circuits & Photonics IP
- Quantum Cryptography
- Brain-Computer Interfaces
- Quantum Chemistry
- Quantum Sensing



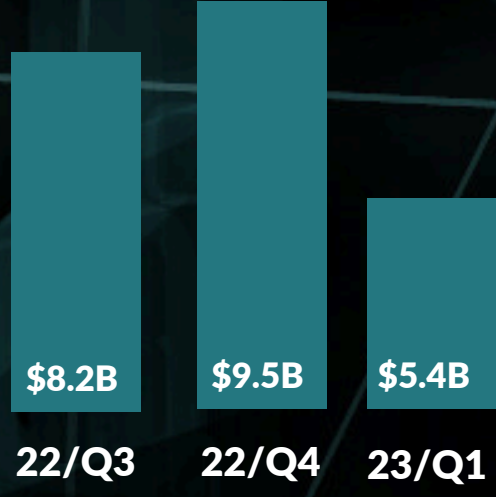
SPACE TECH

- OneWeb
- Earth Observation
- Launch Vehicles
- Communication & Connectivity Satellites
- Materials for Space
- In-Space Operations
- Space Exploration
- Spacecraft Parts

VC Investment Next Frontier Deep Tech Segments in Europe (2022)



Global AI Venture Funding is Down in 23/Q1, but Generative AI is gaining Momentum**



KEY TAKEAWAYS

Digital Sovereignty and Innovation Leadership in Next Frontier Technologies will determine the future of the European Tech Scene and Europe as a whole. We need European solution in Climate Tech and Energy, Quantum, and AI Large Language Models (LLM) and other future technologies.

There will be thousands of startups utilizing AI Foundation Models, such as LLM, for downstream business cases in the future. Investors will need to understand, how the underlying models have been trained and how bias is handled and accounted for.

Hardware and hybrid is the new software - It is becoming more of a commodity. This will be a decisive factor in Next Frontier Deep Tech, especially Space Tech, Future Computing and Climate Tech and Energy.