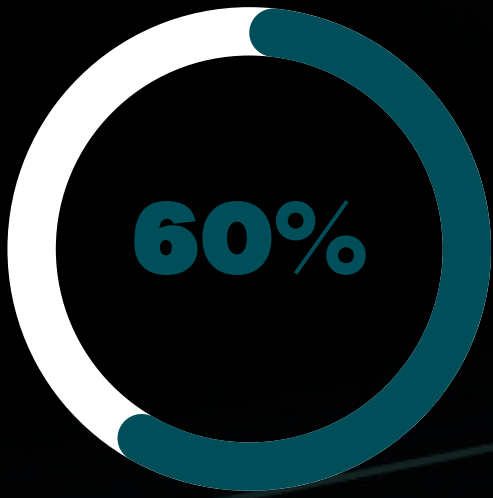


# DEEP TECH

## BREAKTHROUGH TECHNOLOGIES OF THE NEXT DECADE

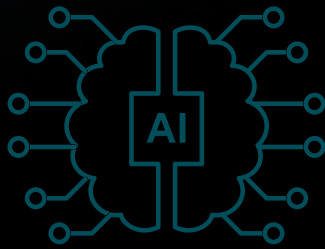


European Deep Tech startups raised \$17.7B in 2022, 22% less than 2021 total, but still +60% more than 2020.

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

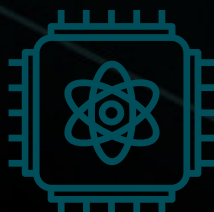


Explainable AI  
Neuromorphic Advanced  
AI Computing Chips  
Generative Design  
AI-Aided Engineering  
Quantum Chemistry  
AI for Chemical and  
Biotech Fields



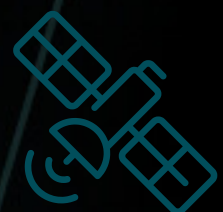
## NOVEL ENERGY

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



## FUTURE COMPUTING

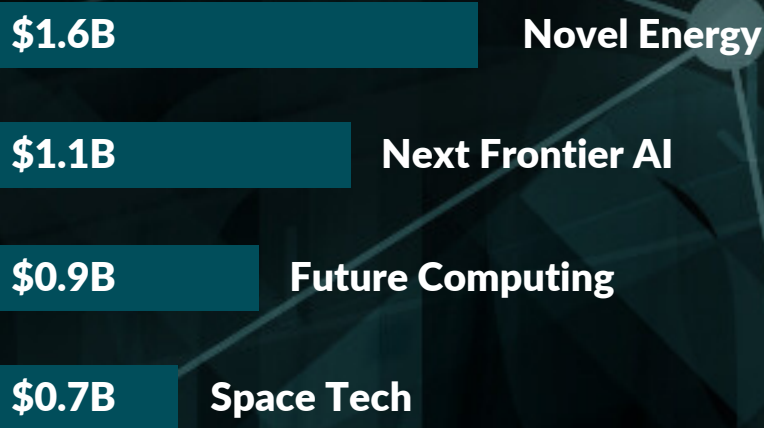
AR & VR  
Quantum Computers  
Photonic Integrated  
Circuits & Photonics IP  
Quantum Cryptography  
Brain-Computer  
Interfaces  
Quantum Chemistry  
Quantum Sensing



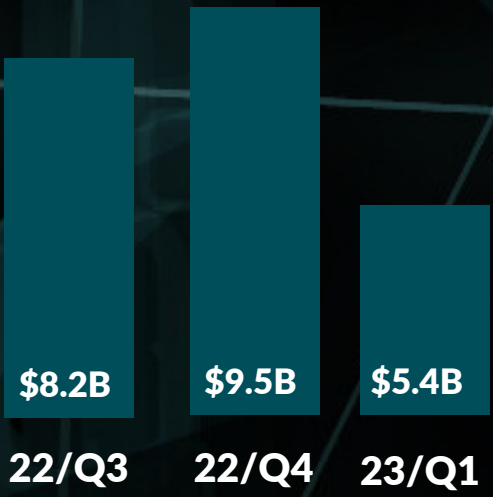
## SPACE TECH

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.