



MINISTRY FOR DEVELOPMENT OF  
ECONOMY, TRADE AND AGRICULTURE  
OF UKRAINE

**#ЕКСПОРТУЙ**  
EXPORT STRATEGY TEAM

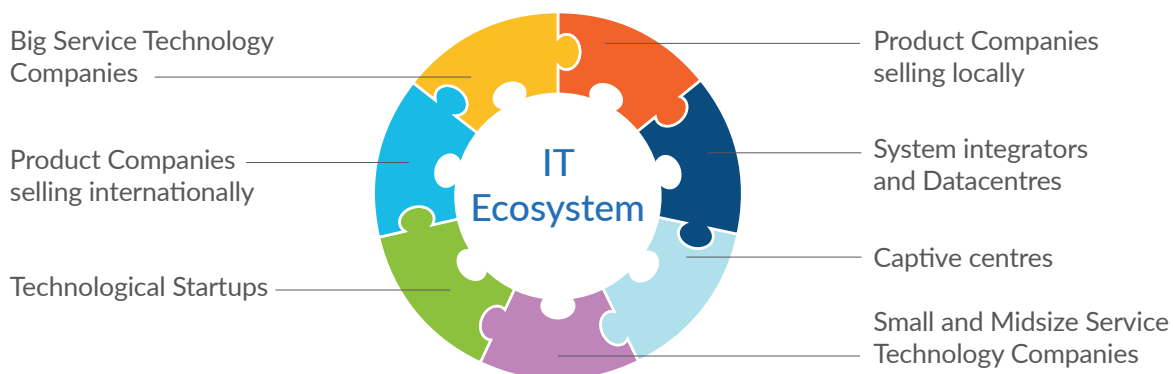


# Ukraine's Information Technologies Sector

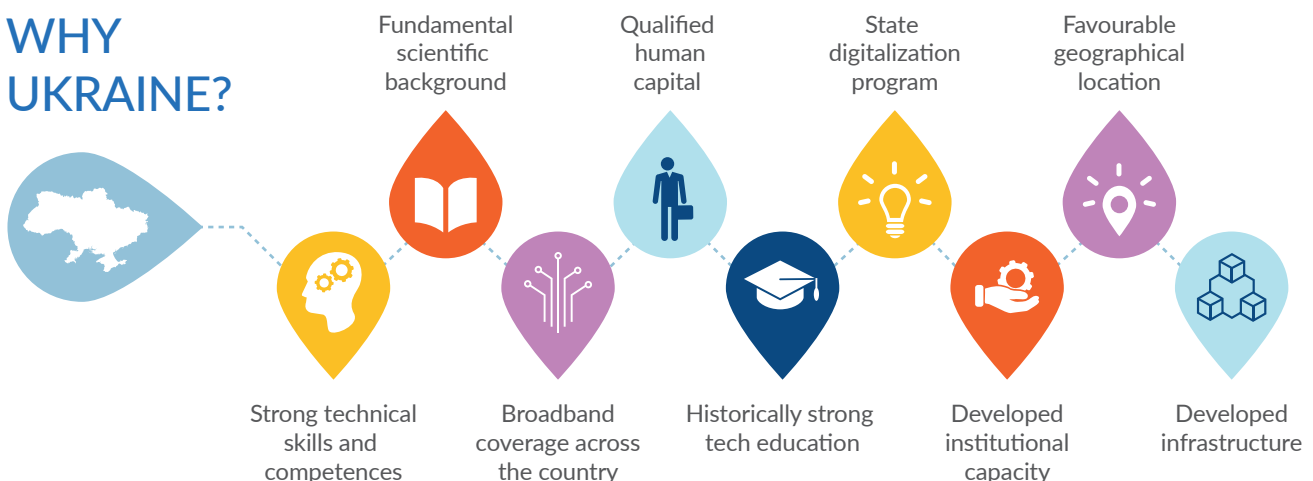
# UKRAINE'S INFORMATION TECHNOLOGIES ECOSYSTEM

Ukrainian IT sector has been growing rapidly over recent decade in the global tech arena thanks to its fundamental scientific background, high broadband coverage enjoyed across the country, highly-qualified specialists and traditionally strong technical education.

- **Big Service Technologies Companies.** The strongest segment. They upgraded from purely outsourcing companies to something larger and with higher value, either as services for extending clients' teams (retention, teambuilding, personal development programs, enhancing productivity through adequate procedures) or as services that provide solutions.
- **Product Companies selling internationally.** Second most promising segment. Head offices of these companies are mainly located outside Ukraine; there is hardly any difference to the Service Technology Companies or Captive centres in terms of their organizational structure.
- **Technological Startups.** Startups are the rising stars according to the matrix of the Boston Consulting Group and they need an adequate ecosystem to grow and flourish.
- **Small and Midsize Service Technology Companies.** These companies already actively explore options to transform to product companies considering high competition in the outsourcing.
- **Captive centres.** Captive centres with R&D activities already operate in Ukraine. However, to develop a resilient and competitive R&D ecosystem, the number of captive centres must be significantly increased.
- **Product Companies selling locally.** This segment consists of old local companies unable to export and fighting for survival in a limited local market, as well as new local companies that have launched successful products and services within respective market niches that justifies their primary focus on the local market.
- **System integrators and Datacentres.** System integrators have small export potential at the moment, just like datacentres; despite the high potential of the latter they are not consolidated nor searching for solutions to resolve their business problems and do not have a proper understanding of business requirements.



## WHY UKRAINE?



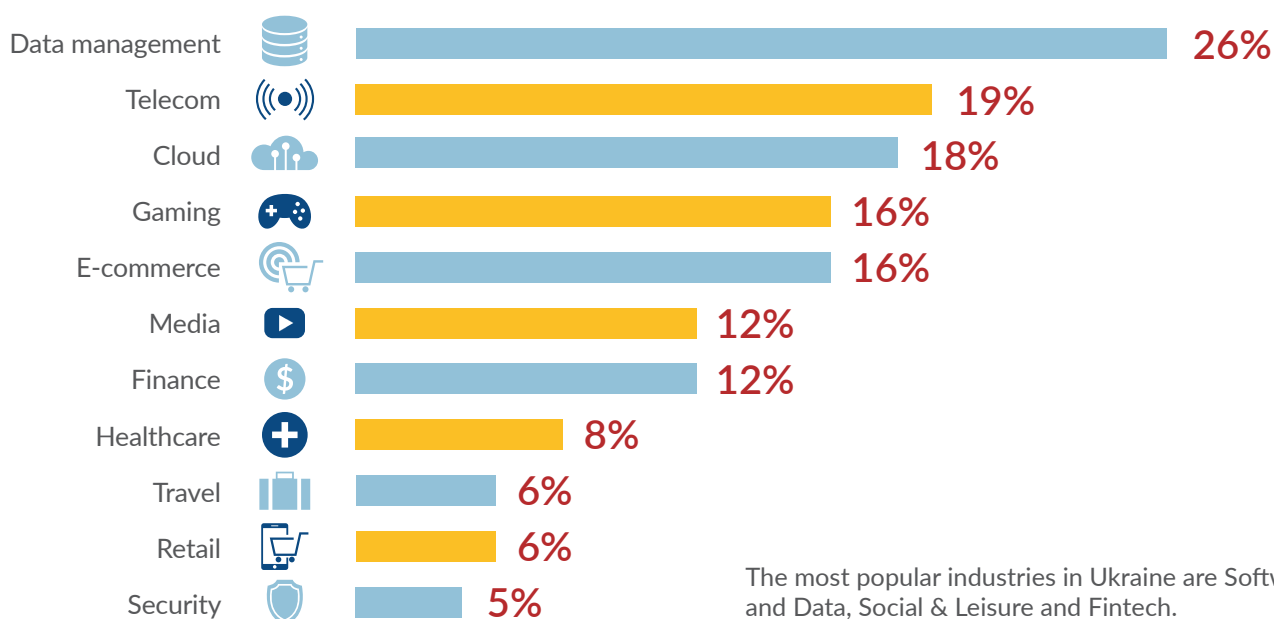
# UKRAINE'S INFORMATION TECHNOLOGIES SECTOR OVERVIEW

The sector has grown by nearly 40 times over the last 15 years, from \$110 mln in 2003 to about \$4.5 bln in 2018. New trends such as cloud computing, IoT and robotics, big data and AI, 3D printing and blockchain are developing and considered to be a dynamic, fast-growing sector segments.



The Government has established the Ukrainian Startup Fund to support innovation and IT in Ukraine and has taken important steps to strengthen the protection of intellectual property rights.

## KEY INDUSTRIES OF UKRAINIAN IT COMPANIES

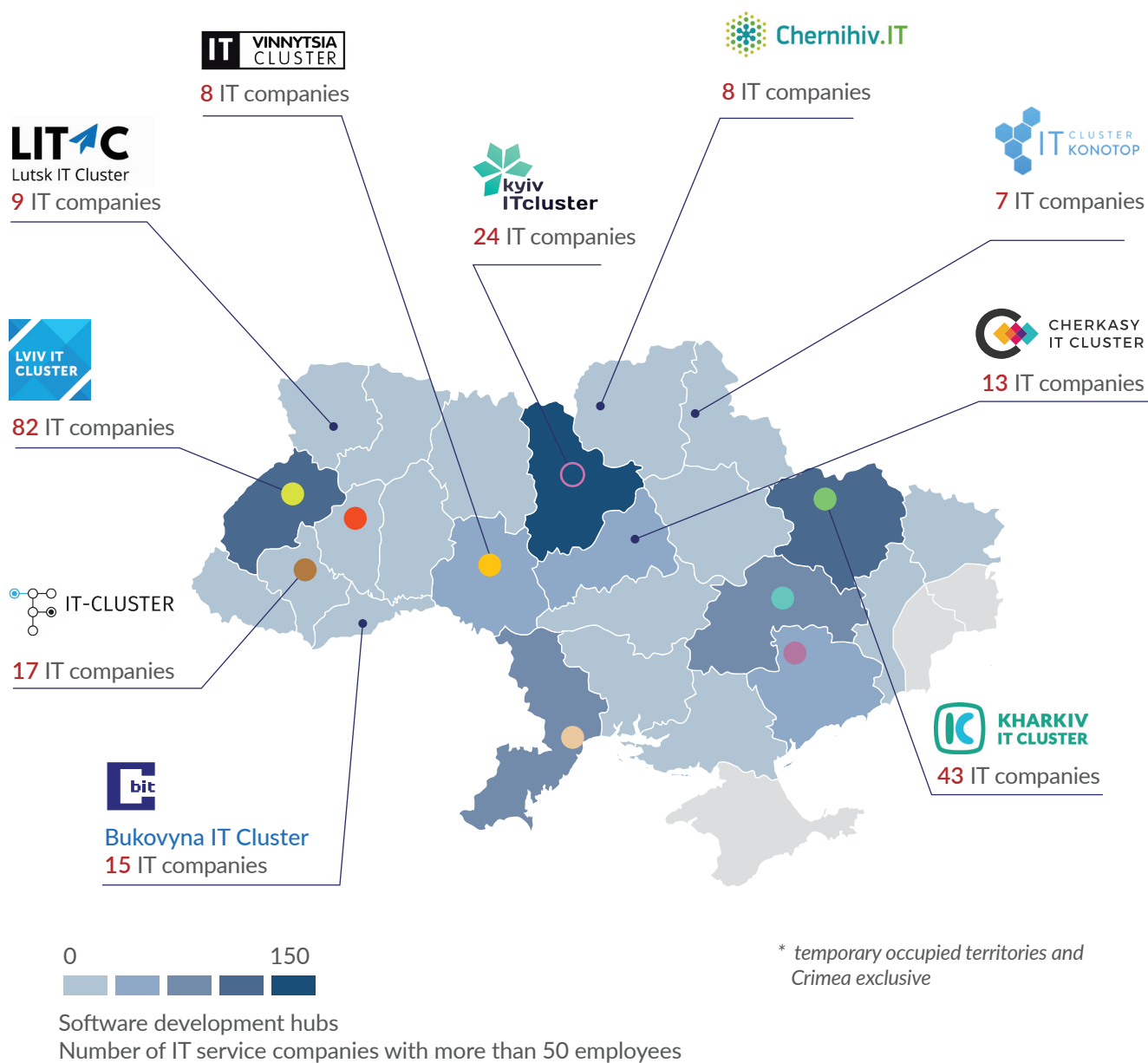


The most popular industries in Ukraine are Software and Data, Social & Leisure and Fintech.



# MAJOR IT CLUSTERS AND HUBS IN UKRAINE

## CONCENTRATION OF IT PROFESSIONALS



### Concentration of IT professionals



Ukrainian developers are skilled in a variety of technologies, with Java, C#, JavaScript, PHP, and Python being the most popular programming languages.





# MAJOR TECH EVENTS IN UKRAINE



.Net Fest



Devovx Ukraine  
(former JavaDay)



iForum



ITEM



WEEKEND  
UKRAINE

IT Weekend Ukraine



JEEConf



KharkivJS



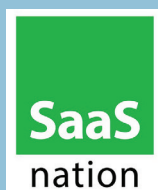
Kyiv Outsourcing Forum



Lviv IT Arena



Mobile Beach  
Conference Odesa



SaaS Nation



QA Fest



UNIT Fintech Forum



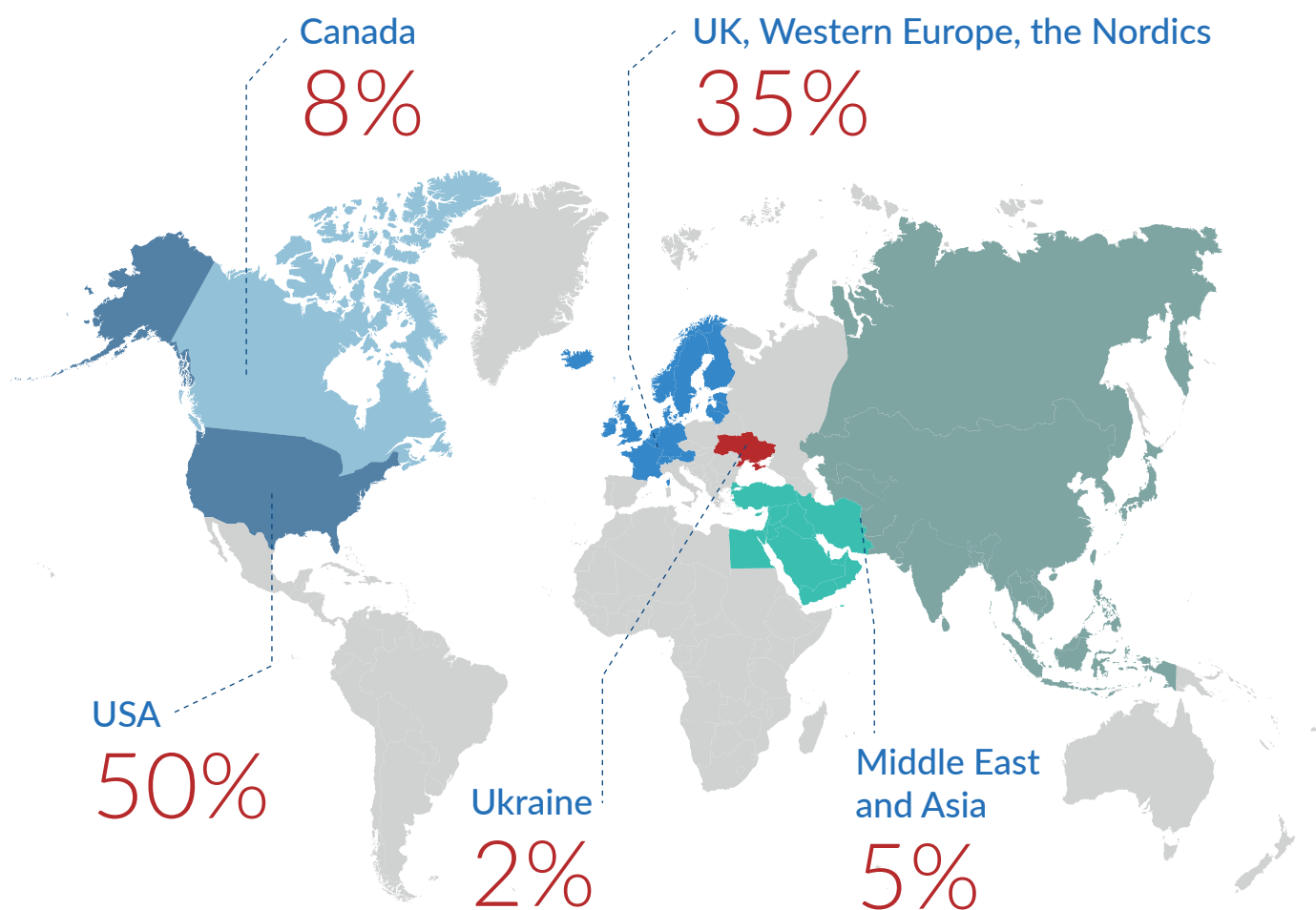
UNIT Investment Summit

1000+ events for  
IT specialists, Startups  
and investors annually



# GLOBAL RECOGNITION OF INFORMATION TECHNOLOGIES SECTOR

## Target markets of the Ukrainian IT service companies



**Nº1** in Europe by the volume of IT services



**>50%** of exports go to USA and Europe



**2<sup>nd</sup>** largest service export in Ukraine in 2019



**100+** Fortune 500 companies are Ukrainian IT companies' clients



Ranked **5<sup>th</sup>** by 2019 Global Gig-Economy Index



Ranked **8<sup>th</sup>** by Best programmers ranking by Skill Value



**Top-15** in TopCoder ranking



**Top-10** countries in software development and IT outsourcing



Ranked **20<sup>th</sup>** by 2019 Global Services Location Index by ATKearney



Ukraine ranked **29<sup>th</sup>** in 2020 StartupBlink global ranking based on evaluation of Startup ecosystem



Kyiv ranked **32<sup>nd</sup>** by 2020 StartupBlink global ranking based on evaluation of its startup ecosystem



**Top-50** in the Global Innovation Index



Highly ranked at the annual International Mathematical Olympiad



Gradually improving in the Doing Business ranking



# EXPORT STRATEGY FOR INFORMATION TECHNOLOGIES SECTOR

## Vision

Ukraine: an innovation-driven, universally recognized technology destination that delivers high value for the global economy

## Strategic objectives



**Support** and further develop an enabling, predictable and transparent business environment that stimulates increased growth and development of the IT sector and facilitates its export potential

- ◆ Ensure favourable conditions to stimulate sustainable sector growth through key regulatory changes
- ◆ Provide an enabling environment for the creation of Startups and IT product development, and increased number of captive centres of international companies



**Enhance** national and international visibility of IT sector to promote Ukraine as a preferable IT location for investors and increase export opportunities for IT services and products

- ◆ On the state level to enhance collaboration between the Ministry of Education and IT sector to support transformation of universities to meet the needs of economy, improve their governance structure and attract IT talent to teach at the universities
- ◆ On the regional level to enhance collaboration among universities and local IT clusters, companies, associations, other NGOs and communities to facilitate development of new bachelor's and master's programs and improving teaching staff skills
- ◆ Improve business development, marketing, soft skills and foreign languages skills of IT professionals
- ◆ Create favourable conditions for professionals in IT sector, as well as in other knowledge-based and creative industries to keep talents in the country



**Improve** supply of skilled, highly specialized professionals to satisfy growing needs in IT sector through improvement of the education system and creation of favourable conditions for keeping IT talent in Ukraine

- ◆ Implement country branding and promotion of Ukraine abroad as an innovation-driven, universally recognized technology destination that delivers high value for the global economy
- ◆ Implement internal promotion of the IT sector that brings global standards of doing business into Ukraine, fosters new generations of people with a global mindset, increases the purchasing power of Ukrainians, stimulates development of adjacent sectors and the IT ecosystem as a whole
- ◆ Contribute to further development and cooperation of trade support institutions, investment promotion institutions and other local stakeholders to educate and attract global investors





MINISTRY FOR DEVELOPMENT OF  
ECONOMY, TRADE AND AGRICULTURE  
OF UKRAINE

**#ЕКСПОРТУЙ**  
EXPORT STRATEGY TEAM



NON - GOVERNMENTAL UNION  
FOUNDATION FOR SUPPORT OF REFORMS IN UKRAINE

