



**MAIN
PROCESSES IN
THE SOFTWARE
DEVELOPMENT
INDUSTRY
IN RUSSIA**

Attraction of investments

RUSSOFT began to pay attention to the problem of investments within the framework of its annual research since 2011. First of all, during the surveys it was possible to find out what part of the companies has external financing, as well as to clarify plans for attracting investments in the next 2 years. The fact that the lack of investment is one of the most serious problems of the industry was confirmed by a survey conducted in early 2017 as part of the study “Prospects of Russian IT developments in the global market” initiated by the SAP corporation. It showed that for 52 % of software companies the growth of foreign sales is constrained by an insufficient marketing budget, and for 33 % – by a lack of funds to develop solutions that can be competitive in foreign markets. Moreover, software companies, first of all, do not have enough “long-term money” – investments for 3–5 years. Attracting loans requires material collateral, which they do not have due to the virtual nature of production, so companies usually need venture capital or access to the stock market. But even there, there are severe restrictions. The results of the annual RUSSOFT research indicate that

no cardinal changes have taken place in 4 years – the investment deficit is still large, and the marketing budget has not increased on average.

In 2017, changes in the questionnaire made it possible to estimate not only the share of companies with external financing, but also the approximate volume of attracted investments. However, when extrapolating the data for the surveyed companies to the entire industry for four years (summing up the results of 2016–2019), too large fluctuations were obtained, which in reality could hardly have taken place. Therefore, this extrapolation was not justified. This was especially true of the results of 2019, since in 2020 only 72 companies participated in the survey due to the pandemic, and in previous years – 150–160.

In 2020, there was another change in the questionnaire: respondents were able to indicate the total volume of investments and their need for them. It was possible to use this addition to calculate the total investment in the entire industry only in 2021, thanks to the participation in a

survey of a record number of software companies (206). Such activity of enterprises allows to make conservative estimates of the volume of investments in the software industry.

Calculations showed that the volume of external financing amounted to approximately RUB 10 billion (\$140 million), and the total investment amounted to RUB 46.5 billion (\$640 million) with a need estimated at RUB 125 billion (\$1.73 billion). Consequently, the available investment is only 37 % of the required amount. At the same time, external financing provides 22 % of all investments made in 2020.

For previous years, you can focus only on relative values: the share of external investments in their total volume, the share of actual investments in the amount required, the expected change in the current and next years.

If we use the same methods of extrapolating the survey data (based on total revenues), then in 2020 there was a significant increase in both the total volume of investments and the volume of external financing.

Investment attraction plans of software companies and their implementation

The data of the annual survey allow RUSSOFT to determine not only the approximate volume of investments, but also the share of companies that would like to have external financing, but cannot attract it.

There were at least 2 times more companies that counted on external financing from 2011 to 2018 (according

to the results of one of the surveys – almost 2 times more) than the recipients of investments. For example, if 14 % of the surveyed companies expected to receive external financing by the end of 2017, then in reality there were 6 %. Consequently, the assumption that the need for external financing is several times higher than the volume of actual investments received additional

confirmation. Other sources also confirmed such a large gap, but, as a rule, they represented the entire high-tech sector of the Russian economy, or at least the entire IT industry (together with Internet companies).

By 2018, the results of surveys showed that companies began to more realistically assess the prospects for

attracting investment. If in terms of the volume of investments they still significantly overestimated the available opportunities, then in the fact of attracting funds from external sources, there was already no big difference with their forecasts. For example, 11 % of the companies surveyed in 2017 and 12 % of those surveyed at the beginning of 2018 counted on investments in 2018. The share of actual recipients is fully in line with the forecast – 11 %.

However, in 2020 the difference turned out to be large again: if 12 % of companies planned to attract external investments, then in fact there were only 7 % of them.

Share of companies that have attracted or are planning to attract external financing

Year of the survey	in the previous year	this year	next year
2011	9%	16%	18%
2012	9%	24%	26%
2013	12%	25%	25%
2014	7%	18%	27%
2015	7%	22%	24%
2016	10%	19%	23%
2017	11%	14%	11%
2018	6%	12%	10%
2019	11%	13%	16%
2020	6%	12%	27%
2021	7%	16%	18%

Share of companies that invested in development in 2020, by volume of internal and external investments (forecast for 2021–2022)

	In 2020 (fact)		In 2021 (forecast)		In 2022 (forecast)	
	Have attracted investments	Have attracted external investments	Expect to attract investments	Expect to attract external investments	Expect to attract investments	Expect to attract external investments
Less than RUB 64 million	25%	7%	27%	12%	25%	13%
From RUB 64 million to RUB 320 million	6%	0%	8%	3%	10%	4%
From RUB 320 million to RUB 640 million	1%	1%	1%	1%	2%	2%
More than RUB 640 million	0%	0%	0%	0%	0%	0%
Found it difficult to answer	5%	5%	5%	4%	6%	5%
Attracted (plan)	31%	7%	36%	16%	36%	18%

It is noteworthy that no surveyed company received more than RUB 640 million in investments in the previous year (2020), and no company plans such a volume of investments in 2021–2022 (although there were such companies a year earlier).

In 2020, there was another change in the questionnaire: respondents were able to indicate the total amount of available investments and their need for them. Although due to the pandemic, it was not possible to conduct a full-fledged survey, however, some preliminary conclusions can be drawn from the new data obtained.

A survey with an updated question on investments showed that at the end of 2019, external financing accounted

for only about a fifth (18 %) of the total volume of investments. The main source of investment in the software industry is the own funds of companies and their owners. At the same time, software developers believe that the volume of investments could be 60 % more.

Available investments in 2020 covered only 37 % of companies' financial investment needs. Software companies could ideally absorb more than 2.5 times more investment funds than they had. This data was obtained based on the assessments of the surveyed companies. In reality, much depends on whether they would be able to expand their staff accordingly due to a shortage of personnel (they can do this mainly only at the expense of each other).

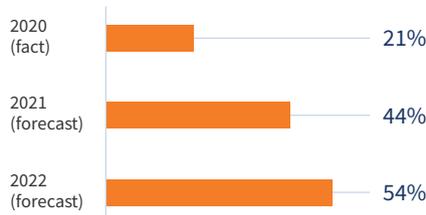
In 2021–2022, the companies surveyed do not expect a reduction in the investment gap. At the same time, they expect to increase the share of external financing in total investment (from 21 % in 2020 to 54 % in 2022).

There is clearly a request for a fundamental change in the funding structure. It is difficult to judge how justified the investment expectations are in the current situation of high uncertainty. Most likely, even under the most optimistic scenario, such a strong increase in external financing is highly improbable. Nevertheless, a gradual increase in its share is quite possible with the attention that the government has begun to pay to the industry.

The share of the total investment in the required investment (calculated according to the RUSSOFT survey in 2021)



The share of external financing in the total volume of investments in 2020 and in the next 2 years (calculated according to the RUSSOFT survey in 2021)



The main events of the venture market

A selection of news from 2017–2019 showed that the state, through its structures: development institutions and state corporations tried to stimulate investment activity in Russia again, as it was in 2008–2009. At the same time, the number of relevant messages in the media grew. Along with state corporations, large Russian private companies also more often began to demonstrate investment activity in the high-tech sector of the economy. Some news suggests that you can count on foreign funding (for example, Chinese companies and investment funds).

The purchase of domestic software companies by Russian state corporations and large foreign companies is another trend that should be noted in connection with the situation on the venture capital market. At the same time, in 2018–2019, very large enterprises by Russian standards were sold to foreigners: TRANSAS, Parallels and Luxoft. There were no such deals in previous years.

The purchase by corporations of a controlling stake in software companies may well ensure a sharp increase in investment in the development of these companies. However, not all of these investments will be directed to the Russian development centers of the sold companies.

Judging by the media publications about the IT sector in Russia, we can confidently say that the pandemic did not reduce investment activity in 2020 compared to the previous year. Several studies have subsequently confirmed the absence of contraction. Although there are other results, they seem less reliable.

For incomplete 2021 (in fact, for 8 months), there were almost 2 times more reports on attracting investments by Russian companies than for the whole of 2020, as well as for the whole of 2019.

Since there is no reason to associate such growth with the sudden great openness of the venture capital investment market, it can be assumed that an upturn began in 2021 and, perhaps, even something similar to an investment boom occurred, but such estimates require confirmation.

Nevertheless, positive changes can be noted. The question is how significant they are.

According to media reports, certain priorities and dynamics of attracting investments are also traced. If we consider technologies, then most of all investments in two incomplete years (2020 and 8 months of 2021) came to the field of automation of various types of activities (tourism, manufacturing, management, payments). There are 18 messages about this (5 in 2020 and 13 in 2021). Artificial intelligence and robotization are mentioned in 12 messages (5 in 2020 and 7 in 2021), various types of image recognition (objects, faces, emotions, texts) – 6 (2 in 2020 and 4 in 2021), office software – 4 (only in 2021), information security – 4 (2 each in 2020 and 2021).

Information storage technologies, games and entertainment, educational solutions, navigation technologies, analytics, navigation systems, video conferencing, VR and AR were mentioned no more than 2–3 times for a year and 8 months.

According to the sources of investments, the following statistics were obtained. Most often, investors are private funds, investor clubs, individuals – 24 mentions (9 in 2020 and 15 in 2021). These are domestic foundations or the foundations, the affiliation of which to any country was not indicated. At the same time, a number of investors were unambiguously defined as foreign: in 2020 there was only one mention of such

an investor, and in 2021 – 8 at once. At the same time, there are many reports about attracting investments from companies with Russian roots. RUSSOFT has not yet classified them as Russian or foreign companies, according to its own criteria. They can be both, but, as a rule, development is carried out in Russia. Such companies were mentioned 5 times in 2020 and 4 times – in 2021 in relation to attracting investments abroad.

State structures (foundations or development institutions that distribute grants) were mentioned as investors 9 times (3 times in 2020 and 6 in 2021), Russian corporations – 4 times (2 times in 2020 and 2021).

It can be assumed that a new source of replenishment of investment resources, the stock exchange (basically, we are talking about the Moscow Stock Exchange), has started working. There were 6 messages about the placement of shares or bonds (3 each in 2020 and 2021).

Import substitution

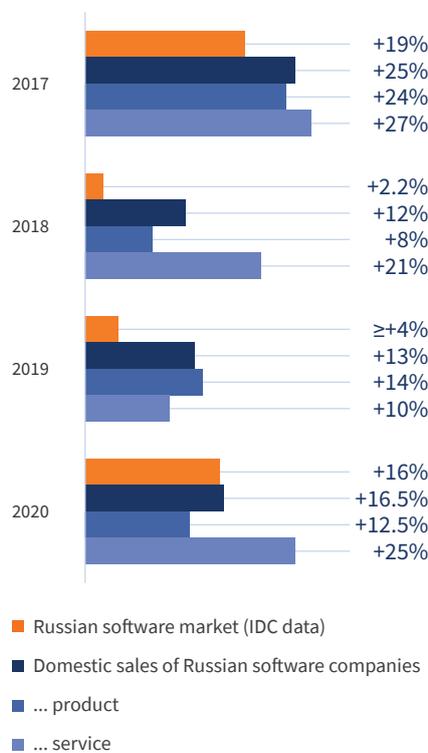
The process of import substitution in the software sector has been going on for the last 15–20 years, but it began to take shape in 2014 in connection with the American sanctions against a number of Russian enterprises (including banks) due to the events in Ukraine.

In recent years, the process of import substitution has either accelerated or slowed down. Another slowdown was recorded at the end of 2017, and in 2018 there was an acceleration. This was evidenced primarily by the growth in sales of Russian software companies in the domestic market and the change in the volume of the Russian software market. In addition, the change in activity for the transition to domestic solutions can be judged by the number of relevant messages in the media (see section Quantitative estimates of the effect obtained from the practical implementation of information technology).

If we compare the growth rates of the market and the growth of sales of Russian companies in the domestic market, then in 2016 the difference was huge – 30 percentage points (the sales of domestic companies on it grew so much faster than the market), in 2017 this difference decreased to 5 percentage points, and in 2018 it increased to about 10. It remained at this level in 2019.

In 2020, if we compare data on the growth of the domestic market and sales of domestic companies on it, the process of import substitution has stopped. This (or at least a slowdown) is also indicated by media reports, which reflect how this process is going (below is a list of these messages and their analysis). Apparently, during the pandemic, it was necessary to buy software urgently, without giving priority to domestic companies, since the implementation of domestic software, as a rule, requires more time and more

Comparison of growth indicators of the Russian software market and sales of Russian software companies on this market (in dollar terms)



preparation. In addition, there is every reason to believe that the Russian software market is already growing largely due to the sales of domestic software on it.

Service companies, which are dominated by revenues from custom development, are increasing sales in the domestic market faster than this market is growing (in 2017–2018 and by the end of 2020, the growth in sales within Russia was even more significant than that of product companies).

Companies developing custom software were not previously considered participants in the import substitution process, because since 2005–2008 their foreign competitors almost did not provide similar services in Russia. In fact, import substitution in the provision of software development services in Russia was successfully carried out by Russian service companies, which did not allow competitors from India and China (other developing countries with lower efficiency and a similar service price), or competitors from developed countries to conquer the Russian market.

It is noteworthy that IDC in its reports began to mention import substitution as a trend that would have a significant impact on the Russian IT market in the near future.

Comparison of the market growth rates and the growth rates of sales of Russian companies on it allows, with some assumptions, to make a supposition about the trend of software import substitution, which is subsequently verified by other indicators and other information. At the same time, the slowdown in the rate of import substitution in 2018–2020 looks quite logical.

The main drivers of the import substitution process were the sanctions imposed on a certain circle of Russian enterprises (a real threat of expanding this circle), and the fall in the ruble against the dollar, which sharply increased the price of foreign solutions in ruble terms. Since the ruble strengthened by about 15 % in 2017, the factor of exchange rate fluctuations began to work against import substitution. At the same time, the impact of the sanctions has not changed dramatically. In 2018–2020, the ruble against the dollar depreciated again, because of this, the price of foreign software increased and Russian customers began to purchase foreign

software that had risen in ruble terms less often.

Obtaining quantitative indicators that objectively characterize the entire process of import substitution is not easy, if not impossible. For example, in the case of a transition to free software, which makes it possible not to depend on the loyalty of foreign countries, in general it is not always a question of selling software, but often of providing services for its installation, support and development. And small businesses download such software from free software repositories without even requesting a service for its support and installation.

The number of messages about significant events related to import substitution also serves as an indirect sign of how actively domestic solutions are replacing foreign ones. If in 2017 there were 9 such messages, then in 2018 there were already 19, in 2019 – 37, in 2020 – 46, and for incomplete 2021 – 53 of them. Relevant news is related both to launched projects and plans of state corporations, and government decisions.

The process of import substitution can also be judged by the change in the proceeds from the sales within Russia of key foreign and Russian companies. For example, in 2019, the revenue of the Russian office of Microsoft (Microsoft Rus) decreased by 13 % – from RUB 7.97 billion to RUB 6.93 billion, and in June 2021 it became known that the headcount of Microsoft in Russia for 7 years (since 2014) decreased from 1 thousand up to 300 employees. At the same time, Russian developers of OS (based on Linux) and office applications are experiencing an increase of tens of percent, and in some cases, of several times.

Analysis of media reports, as well as other observations, allows us to conclude that there is some confusion in the

government's attempts to influence the import substitution process.

This conclusion is confirmed by the results of the analysis of the spending of Russian government agencies on import substitution of software in 2017–2018, which was presented by the Accounts Chamber in early 2019. Its auditors noted the absence of clear plans for import substitution among government agencies and the presence of violations in the implementation of public procurement. In addition, unified characteristics of the purchased software have not been established for government agencies, which allows them to purchase foreign products with the supposedly necessary redundant functionality. The objects of audit by the Accounts Chamber were 80 federal state bodies and governing bodies of state extra-budgetary funds, state bodies of 85 regions, as well as of 36 urban districts with a population of more than 500 thousand people. During the audit, 33.7 thousand state and municipal purchases were analyzed. The auditors found that in 121 purchases of federal government agencies and state funds for the amount of almost RUB 3.3 billion, there are signs of violations of import substitution standards.

In 2017–2018, more than 96 % of government agencies and state funds in Russia used OS that were not in the Russian Software Registry. About 82 % of government agencies used foreign mail servers. More than 99 % of government agencies used Microsoft or Oracle DBMSs, as well as open source DBMSs of Red Hat, CentOS, Sybase SQL Anywhere, FreeBSD, etc. These DBMSs are not in the Russian Software Registry, some of them have restrictions on the use and technical support in Russia.

As for electronic document management and information security systems,

Russian software makes up three quarters of the products used.

In the regions of Russia, server operating systems, directory services and basic services of Microsoft and other foreign vendors are used in about 94 % of cases, foreign DBMSs – in 100 % of cases, foreign mail systems – in 91 % of cases.

Since 2020, the situation has most likely begun to improve, but there are still a lot of manifestations that the process is chaotic. There is still no single plan with control over its implementation in terms of key indicators, except for plans for the share of purchases of domestic software by government agencies.

State policy in the field of import substitution

After long talks about the need for import substitution, after the adoption of the first anti-Russian sanctions applicable to the supply of software to Russia, in 2014 the corresponding decisions at the state level began to be made, although for almost two years they did not have a significant effect. It turned out that first it was necessary to decide what exactly should be stimulated and what should be called import substitution. It was necessary to define a domestic software developer (it took almost a year to formulate this definition and amend the legislation).

When the definitions became clear and a ban was formulated for state structures and enterprises to purchase foreign software, provided that there was a domestic analogue, it turned out that the control mechanism had not been developed, and state purchasers did not have incentives to import substitution, but they acquire serious risks of criminal prosecution for the violation of the law in connection with the violation of the terms of purchases, which they must agree to during import substitution before the expiration of the amortization period of previously purchased imported software.

As a result, according to the respondents, despite the prohibitions, foreign solutions continue to be supplied to government structures (either justifying this fact by the absence of a domestic analogue, or under the trademarks of the Russian companies that use the OEM model for this).

While the state was working out approaches to import substitution of software and trying to form tools for its financial support, Russian IT companies in 2014 began to actively take actions aimed at preparing alternative solutions to replace imported software. In 2014, the creation of consortia of companies was

initiated, which would make it possible to create complex solutions based on the developments of a number of companies or jointly promote their systems on the Russian market (especially in the public sector, including state-owned enterprises). In particular, the following consortia were created: BETA – to form a full stack of domestic software (or free software) and replace basic and application software for the banking sector, and SOYUZ – to replace not only imported basic and application software for the oil and gas sector, but also to replace imported servers with domestic ones based on Elbrus processors. Looking at these actions of domestic companies, one can unequivocally speak of preparations for a change in the market structure (positive from the standpoint of IT users and domestic developers).

In 2015, there was some acceleration in the import substitution process. However, it was caused not so much by the decisions of the Russian government and changes in legislation, as by anti-Russian sanctions and the devaluation of the ruble. A number of enterprises faced with the fact that foreign software vendors have ceased to support previously purchased software, and they had to look for an alternative, even without government incentives for import substitution. Some corporations that risked getting on the sanctions list did not wait for a denial of service from Western vendors. For example, JSC Russian Helicopters launched a program to switch to free basic software (first of all, to the Linux operating system of domestic assembly).

There are doubts about the effectiveness of the Russian Software Registry, which appeared in 2016 under the Ministry of Digital Development, Communications and Mass Media of the Russian Federation. As of early September 2021, 11,320 domestic software products



It is obvious that with the adoption of the course towards import substitution and digitalization, the Russian IT-market has become not only more voluminous, but also of higher quality. An increase in the competitiveness of domestic products together with an effective dialogue among developers stimulates the release of complex sanction-resistant solutions that are so necessary for the implementation of the state tasks. Strengthening the country's IT sovereignty is the main trend that will determine the development of the information technology industry in the coming years.

Rustam Rustamov
deputy general director
at RED SOFT



were registered in the Registry (62 % more than a year earlier) and 3,574 copyright holders. A number of domestic developers consider its creation to be quite useful for ensuring the import substitution process. The presence of such a large number of companies that register their software in the Registry also suggests that there is a need for it, albeit artificially created. However, there are doubts about the effectiveness of the Registry as it exists.

In June 2021, the Ministry of Digital Development, Communications and Mass Media developed a new, more detailed version of the classifier, which would be used as part of the Russian Software Registry. Its current version includes only 26 classes, and the new version is also divided into sections, and the total number of classes has exceeded 95. This classifier has yet to be studied together with experts, but it is unlikely that it will fundamentally change anything if it does

not reflect the need to replace a set of interrelated decisions. In many cases, these must be hardware and software systems. However, until now, in Russian reality, the developers of such complexes have to choose for themselves: to become either software developers or hardware developers in order to take advantage of the tax benefits provided by the state.

The annual survey of RUSOFT shows that, on average, the assessment of the effectiveness of the Domestic Software Registry in terms of its impact on the economic activities of the surveyed companies is low.

In 2019, the average score of such influence of the Registry for all the surveyed companies approached zero: it decreased from 0.16 to 0.09. However, at the same time, companies that do not work in far-abroad countries began to assess this influence better – there was

an increase in the average score from 0.15 to 0.22 (still less than 0.25 obtained in the 2017 survey), and companies operating in the far abroad, it was estimated much worse – a drop from 0.16 to a negative value (-0.01).

In 2020, there were no significant changes in the assessment of the effectiveness of the software import substitution policy, and since there were much fewer respondents than in previous years, the analysis of assessments for individual categories of companies was not carried out (splitting further increases the error).

In 2021, the average score rose to a record value of 0.33 (which is still closer to zero than to 1). This means that companies assess the bans on the use of foreign software in the presence of an analogue in the Domestic Software Registry positively, but believe that their impact is insignificant.

Impact of bans on the use of foreign software in the presence of an analogue in the Domestic Software Registry on companies with different dependence on the situation in the Russian market, the share of the companies surveyed in 2021

	All surveyed companies	Do not work in far-abroad countries	Work in far-abroad countries
Very negative (-3 points)	3.5 %	3.8 %	3.3 %
Negative (-2)	8 %	6 %	10 %
Negative, but insignificant impact (-1)	6 %	5 %	8 %
No impact (0)	45 %	43 %	47 %
Positive, but insignificant impact (+1)	16 %	19 %	13 %
Positive (+2)	12 %	13 %	12 %
Very positive (+3)		10 %	8 %
Average point	0.33	0.46	0.23
Found it difficult to assess	17 %	20 %	14 %

For service companies in general, the importance of the Registry is very low. The average score was only 0.01 in 2019, and in 2021 it became completely negative (-0.04). This figure has almost always fluctuated around zero in recent years. Moreover, more than half of such companies (50–60 %) traditionally do not see any impact of the Registry on the IT market.

Developers of software products are much less likely to show indifference to the Registry. Only 35–40 % of developers of replicated solutions do not see any impact of it, and the average score in 2019 was 0.18, in 2021 it increased to 0.70.

At the same time, 28 % of the companies that receive at least 50 % of their income from exports believe that the existing bans have a negative impact on them. Together with 56 % of the companies that noted its zero impact on the market, the average score was -0.28.

If companies receive their main income in Russia, then the attitude towards the Registry is generally positive – the average score is 0.48, but it is still very low (for 43 % of respondents from this segment, the Registry has no effect).

The biggest benefits from the Registry, according to the survey, are received by product companies, which generate more than 50 % of their revenue from domestic sales. But their average score was 0.78, which is less than the level of positive insignificant influence.

The RUSOFT survey does not allow us to determine what kind of negative impact the presence of bans on the use of foreign software has in the presence of an analogue in the Domestic Software Registry. One can only assume that it has become more difficult for companies to work in foreign markets. It is required to

study more how foreign software bans affect the software industry as a whole.

We will have to take into account the situation and various processes in the world market. For example, the fact that the World Trade Organization (WTO) in October 2020 expressed concern about the Russian policy of import substitution of software and radio electronic equipment, demanding a report on its compliance with the open market requirements. At the same time, under the slogan of protecting the open market, it will be difficult to ignore the threats that most countries in the world have under the US and EU sanctions policy. It is precisely these threats that prevent the formation of an open market.

Western governments use sanctions to exercise political pressure on various states: from China and Russia to Venezuela and Syria, providing preferences to their own companies. Corporations themselves use or try to use their own monopoly position. There are already many similar examples.

For example, in early 2020, Google left Turkey without its Android operating system and applications on new devices in response to a fine from the Turkish antitrust authority. The Turkish Competition Council drew attention to the fact that users of the Android system on smartphones cannot choose their search engine by default, and obliged Google to amend the license agreement.

In April 2021, the US authorities blacklisted the Chinese company Phytium with alleged links to the Chinese military. Because of this, the Taiwanese company TSMC, the world's largest manufacturer of semiconductor products, was forced to suspend cooperation with it. Phytium develops processors for supercomputers based on the ARM architecture. In a similar pattern,

the United States is putting pressure on Huawei, which it uses as leverage over China in a trade war. In May 2020, they also banned TSMC from producing chips for it.

In September 2021, it became known that the Ministry of Digital Development, Communications and Mass Media plans to conduct a total revision of software from the Russian Software Registry. This need arose because of the new rules for the formation of the Russian Software Registry, as well as because of the avalanche-like increase in the flow of applications to it due to the emergence of benefits from the First package of measures of the state support for the IT industry. The verification process of over 11 thousand programs should be completed by the end of 2021.

Analysis of news that are directly related to import substitution

The analysis of messages concerning directly import substitution leads to the following conclusions. First of all, it is worth noting the intensification of the transition of Russian corporations and authorities to domestic software after a slight slowdown in 2020 caused by the uncertainty of the situation in the first months after the pandemic announcement (in the first 8 months of 2020 there were only 2 relevant messages, and in the last 4 months there were eight of them). In 2021, the process acceleration, which was observed before the pandemic, continued and became obvious (there was, apparently, catching up in the implementation of plans already outlined for 2020–2021).

It should also be noted that in 2021 the number of messages about government decisions (and key companies) stimulating import substitution has increased. At the same time, among these messages appeared those that reflected the activity of key private companies and other non-state structures (primarily industry associations).

Improvement of Russian IT solutions (creation of platform solutions) began to be mentioned more often from September 2020. There were 3 messages for the last 4 months of this year, and only one for the previous 8 months (3 for 8 months of 2021). In this case, it is not the quantity itself that is more important,

but the dynamics. As a rule, work on improving domestic solutions seems to be routine, and there are few reasons to report on the existing constant progress.

There are very few statistical data characterizing the import substitution process. There were problems with this before, but in terms of the reliability of these data. Most likely, such data do not just fail to get into the media, but they do not exist at all. In any case, they are not in the volume that allows us to generally assess the import substitution process.

Distribution of messages in the media in 2018–2021, directly related to import substitution, by topic

	2018	2019	2020	2021 (January–September)	Total for 2018–2021
Transition of Russian corporations and government bodies to domestic software	6	12	10	27	55
Decisions of the government (and key companies) stimulating import substitution	11	11	13	17	52
Sales of companies that receive the most benefits (or losses) from import substitution	—	5	3	5	13
Statistical data characterizing the import substitution process	—	7	2	2	11
Revision of import substitution plans in favor of foreign software	—	2	5	—	7
Improving Russian solutions (creating a set of solutions)	1	2	4	3	10
Messages about sanctions aimed at restricting Russian enterprises to purchase foreign software	2	—	1	2	5

The need for cooperation

The situation in the global and Russian markets is developing in such a way that domestic companies, in order to successfully promote their solutions and services abroad, need to combine efforts at various levels: from coordinated development to joint marketing.

First, there are no companies in Russia with billions of dollars in annual revenues that can compete on an equal footing in turnover and, consequently, in production costs and marketing budget with world leaders. Even the largest Russian software company Kaspersky, with annual revenue of about \$700 million, understands the need for cooperation, which may even be at the level of information exchange.

The management of Kaspersky believes that the more Russian companies there are in a certain market (especially in the countries that are quite exotic for them), the easier it will be for it to conduct business and develop in this market. By and large, successful Russian IT exporters are ready to help newcomers whenever possible, even for free. Especially if these newcomers can become potential technology partners.

Secondly, according to the Russian Export Center, there is a demand in emerging markets for turnkey complex solutions. Customers, as a rule, refuse to form them on their own and wait for an appropriate offer on the market. Such solutions require not only unification of different software developers, but also cooperation with custom software developers, system integrators, distributors, and equipment manufacturers. There are similar requests for complex solutions in the Russian market.

For RUSSOFT, this topic is especially close, since the Association arose due to the fact that in 1999 several companies decided to merge, realizing how small they are in the American

market. Facilitating cooperation between Russian software companies is one of the strategic objectives of the Association.

Thirdly, the import substitution process is often impossible without offering a comprehensive solution. The fact is that Western hardware and software manufacturers have created a client's dependence on interconnected solutions. In many ways, this dependence was created deliberately and artificially in order to bind corporate clients (as well as private users) to them. Therefore, replacing one component of a telecommunications or IT infrastructure with another is either impossible or very difficult without compromising the reliability of the systems used. Consequently, the substitution must also be complex. For example, a computer should ideally have a Russian processor, a Russian OS (based on open source software) and Russian office applications.

Sometimes the conjugation of only two software products is enough, but more often a single hardware and software complex is required. For a number of years, RUSSOFT has been proposing to promote the creation of such complexes at the state level within the framework of the import substitution policy. The Association's Import Substitution Committee, with the support of IIDF, is developing a concept for creating IT consortia in Russia to develop platform IT solutions for industries.

State incentives for the creation of consortia are also important because in Russia joint actions of companies, as well as combining decisions, are difficult, even if they are beneficial to both parties. There are no established traditions of building appropriate relations yet. In this case, unnecessary ambitions and a lack of trust in each other interfere.

In-depth interviews conducted with experts (heads of successful IT exporters, investors, representatives



Besides software development Astra Linux Group also takes an active part in its implementation. This allows us to receive valuable feedback that helps us to improve our products and ensure consumer's needs.

Roman Mylitsin
Director for Innovations,
Astra Linux Group



of development institutions) in the framework of the research “Prospects of Russian IT developments in the global market” initiated by the SAP Corporation (2017), as well as long-term observations

of RUSSOFT experts on developments in software industry allow us to conclude that Russian business is having difficulty establishing interaction. In the last 2 years (2020–2021), successful examples

of such interaction are associated, first of all, with the need to create complexes of solutions to replace foreign analogues.

Examples of joining efforts of Russian companies

2020

1. In July, it became known that Foresight, a developer of BI solutions, and the Parma Technologies Group entered into a partnership agreement. The goal of cooperation is to expand the number of projects to create data management systems based on Russian software in the public and corporate sectors. The Parma Technologies Group of companies develops application systems using technologies for integrating and processing big amounts of data, artificial intelligence and machine learning, and creates cloud services.

2. In July, the Russian companies Edelweiss (electronics developer), Basalt SPO (developer of the Alt operating system line) and Baikal Electronics (developer of crystal-based systems on MIPS and ARM architectures) announced the start of production of the motherboard based on the domestic Baikal-M processor running Alt OS.

3. In July, Kaspersky increased its stake in the Russian company New Cloud Technologies (NCT, developer of the My Office office package) to 47 % by purchasing 17.5 % of its shares. This made it the largest shareholder in NCT. The deal became a continuation of Kaspersky’s strategy to diversify its business and invest in promising IT areas.

4. In July, Medsoft and RED SOFT, as part of a technology partnership, conducted compatibility testing of their products. The developers have confirmed the correct operation of the Quasar software package of the 4th version manufactured by Medsoft with the RED OS operating system manufactured by RED SOFT. The test results are reflected in the bilateral certificate of compatibility. The Quasar software package of the 4th version is an integrated medical information system, fully automated from the registration desk to automatic electronic interaction with federal agencies.

5. In July, it became known that the SKB Kontur group of companies had bought the Kazan developer TaxNet, one of the largest players in the electronic signature and reporting markets of Tatarstan.

6. In February, Mail.ru Group paid RUB 1.6 billion for a controlling stake in the Skillbox educational platform. This project is an online university with employment opportunities for students.

7. In July, two domestic software developers: MyOffice and Instream announced the start of deliveries of a set of import-independent solutions. Customers will be able to purchase the Lotus operating system with the MyOffice Standard package at 20 % below the recommended retail price.

8. In July, Kaspersky and AVL Software and Functions announced the joint development of an automotive electronic control unit based on the KasperskyOS operating system.

9. In December, it became known that ICL Techno and RAIDIX have created the first joint data storage system. Component testing has confirmed the compatibility of the ICL Techno hardware complex and the RAIDIX software. The result was a new joint product called SDS ICL teamRay.

10. In December, Basalt SPO company and the Autonomous non-profit organization for the development of the radio-electronic industry Computing Machinery Consortium signed a memorandum of long-term cooperation. The result of joint activities should be the formation of a domestic software and hardware platform, which is built on the principles of technological independence, develops taking into account modern global trends in the field of IT and computing tools, and meets the requirements of Russian legislation.

2021

1. In January, three residents of Innopolis: My Office, Akronis Infozaschita and ICL presented a turnkey integrated solution that would allow organizations from scratch and quickly deploy a private cloud for joint work with documents, mail, calendar and contacts.

2. In January, VisionLabs and HeadPoint announced a strategic partnership to build IoT and computer vision solutions. They are expected to offer banks, retailers, industrial enterprises, and government agencies

a number of joint solutions based on HeadPoint's InOne IoT platform and VisionLabs' computer vision and machine learning technologies.

3. In March, the Russian software developer Red Soft and the multi-vendor system integrator GK RosIntegratsiya entered into a partnership agreement. The companies will cooperate to jointly develop import-independent software

and hardware systems for public sector customers, as well as develop national technology initiatives.

4. In June, the STC group of companies, which is part of the Sberbank ecosystem, introduced Nestor.BRIEF, a new product based on AI technologies, which is designed to provide record-keeping of workshops and online meetings. It was created jointly with TrueConf. The joint application of the STC solution

with the TrueConf platform will allow companies and organizations to provide their employees with secure video communication with the possibility of open or private record-keeping, which is important for large public and private corporations, federal ministries, services, administrations and other specialized structures where information security requirements are critically important.

The role of IT in the Russian economy

IT companies, including software developers, make a certain contribution to the development of the entire Russian state. They provide employment (at the same time, that employment, which presupposes highly paid work) and tax revenues to budgets of different levels. IT (primarily software) exporters create an inflow of foreign currency into the country, which contributes to the stability of the national currency rate (reduces its volatility).

In the list of indicators of business importance for the state, an important influence of IT against the background of other industries is employment, since more than 1 million people work in the IT sector, including the IT services of various enterprises and government agencies (there are almost 200 thousand people in the software industry in Russia).

However, the impact of IT on the country's economy and the work of government agencies is so great that it will be beneficial for the state to support

the existence of IT companies in every possible way, even if they do not pay taxes, attract foreign currency to the country and provide employment at all.

The influence of IT companies on the economy and the work of government bodies is reflected in a significant increase in productivity and better manageability of enterprises in various industries, significant savings, acceleration of processes, ensuring transparency in decision-making by officials, in increasing the competitiveness of Russian enterprises (including arms exporters) in the world market through embedded software and the use of the most advanced technologies in complex solutions. In addition, software companies can provide the exchange, processing and analysis of a huge amount of information that accumulates in various government bodies and international organizations, as well as create tools for civilian control over the work of officials.

Outsourcing companies that have participated in the implementation of large projects abroad are capable of transferring expertise in the field of management, organization of work of enterprises and government agencies to Russia. Any successful digital transformation project starts with debugging business processes.

The events of recent years (especially the events of 2020) have even more clearly shown the special importance of information technologies for ensuring the functioning of public institutions and also in terms of protecting the human environment.

The pandemic as a whole has accelerated digital transformation (as evidenced by the results of various studies, some of which are presented below in this section). It has also set or will set new tasks that cannot be solved without the computer analysis of a huge amount of data.

It is possible to quantify the impact of the IT industry on the economy, the work of government agencies, and society, but only partially. Any relevant calculations will rely heavily on assumptions and a plenty of expert judgments with very approximate values. In the commercial sphere, the issue of IT implementation is often not discussed at all, because otherwise the company simply cannot exist in the current environment. In such cases, digital transformation may not lead to an immediate improvement in some financial indicators, but it must be compared with what it would have been without the implementation of some critical IT project.

It is obvious that digital transformation will lead to further global changes in society, in governance at the level of states and companies, in the way of life of billions of people, in solving some social problems and the emergence of new ones. It is difficult to find at least some area of human activity that will not be affected by this process. In such a situation, it is important to somehow track the existing tectonic shifts in the economy and social sphere caused by digital transformation. But,

unfortunately, there is still no complete idea of them in order to see the world at least in the foreseeable future. Nevertheless, the process cannot be stopped anyway.

After the Russian government was headed by Mikhail Mishustin, who achieved a lot as the head of the Federal Tax Service thanks to the introduction of information technologies, there appeared more reasons for officials at different levels to better understand the importance of these technologies for the economy, society and government. Moreover, the new prime minister received a higher education diploma in computer-aided design (CAD) with the qualification of a systems engineer.

It is important to bear in mind that thanks to Mikhail Mishustin, a law on tax maneuver in the IT industry was adopted in 2020: from January 1, 2021, for IT companies, income tax rates and contributions to state extra-budgetary funds will be significantly reduced (for more details, see Chapter 4). First of all, these benefits apply to software companies.

At the same time, digital business transformation will be successful only if all employees are involved in the process, and a digital culture takes root in the company. This conclusion was made thanks to an international study conducted in 2019 by the consulting company Capgemini in Europe and the United States. At the same time, six out of ten respondents named corporate culture as the main obstacle to digital transformation.

It is noteworthy that 40 % of executives believe their companies already have a digital culture, but only 27 % of employees agree with them. 62 % of respondents named corporate culture as the main obstacle to digital transformation. This indicator increased in comparison with the previous study – 55 % of respondents believed the same in 2011. Among other factors hampering the transformation process, the survey participants identified archaic IT systems and applications (48 %), lack of digital skills (43 %) and lack of a clear vision of the management (38 %).

Quantitative estimates of the effect obtained from the practical implementation of information technology

According to the calculations of experts of the analytical company J'son & Partners Consulting, IoT solutions and digitalization in agriculture in Russia will bring a total economic effect of RUB 4.8 trillion per year or 5.6 % of the country's GDP growth. The volume of information technology consumption can grow by 22 %, and moreover due to the digitalization of only one industry – agriculture.

J'son & Partners Consulting considers promising a direct sales model, in which agricultural producers “see” the end consumer, its demand volume and structure, and through the use of predictive analytics, they produce exactly what the consumer needs and when they need it. At the same time, product supply management is carried out on the principles of the automatic exchange of information between participants in

the supply chain and minimal use of the warehouse and logistics infrastructure of wholesale intermediaries.

This can be achieved with the help of IoT technologies and end-to-end automation of production and business processes, as a result of which, according to analysts, it will be possible to reduce the prices of basic food products by half while improving their quality.

In addition, the implementation of such a model of relationships in the value added chain of agricultural products will help to dramatically increase the level of automation of the main production and business processes of agriculture, including small ones, which will increase the consumption of information technologies by agricultural enterprises by RUB 156 billion and data transfer services by RUB 11 billion per year.

Finally, the transition to end-to-end highly automated production and supply chains of agricultural products will make this process transparent for banks and allow them to minimize the risks of lending to agricultural producers. This will create the preconditions for increasing the volume of lending to agricultural producers by RUB 500 billion.

Digital McKinsey (a global expert group that brings together McKinsey experts in digital technologies) has identified the sources of GDP growth by 2025 through digitalization. It indicated the values in 2015 prices.

Optimization of production and logistics operations will provide RUB 1.4–4 trillion.

Improving labor efficiency will provide RUB 2.1–2.9 trillion.

Improving equipment performance will provide RUB 0.4–1.4 trillion.

Increasing the efficiency of R&D and product development will provide RUB 0.2–0.5 trillion.

Reduced costs and production losses will provide less than RUB 0.1 trillion

In total, it will provide RUB 4.1–8.9 trillion, or 19–34 % of the total increase in GDP.

Tripling the digital economy by 2025, according to McKinsey experts, is an ambitious, but achievable goal. The share of the digital economy in the US GDP is 10.9 %, in China – 10.0 %, in the EU – 8.2 %, in Czechoslovakia – 6.3 %, in Brazil – 6.2 %.

In Russia, in 2011 this figure was 2.6 %, and by 2015 it grew to 3.9 %.

According to the McKinsey Global Institute (MGI), in the next 20 years, up to 50 % of the world's work operations can be automated, and this process will be comparable in scale to the industrial revolution of the 18th – 19th centuries. Then in England the share of workers employed in the primary sector of the economy more than halved, although it took eight times longer – from 1710 to 1871.

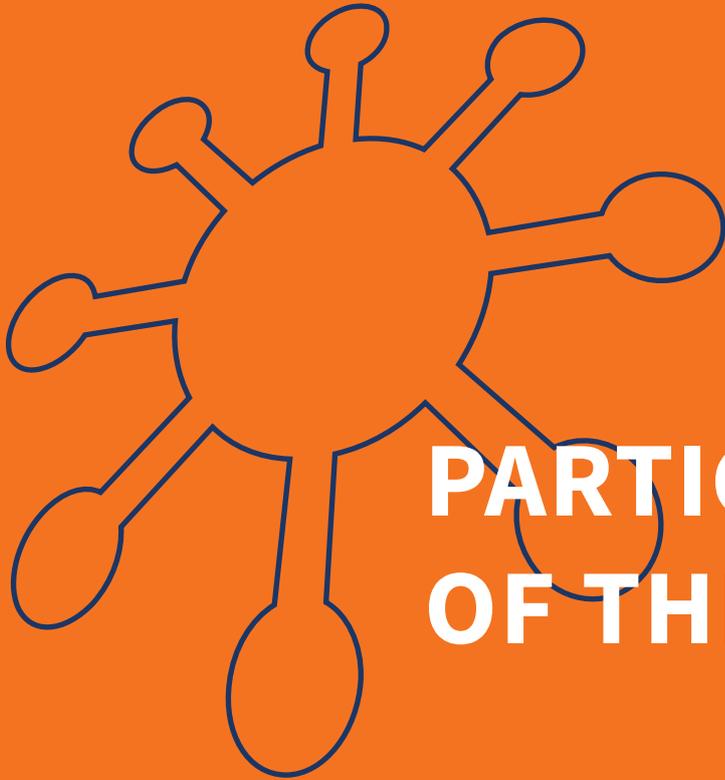
In May 2020, EY published the results of a survey of the Russian market for unmanned aerial vehicles. The effect of using drones, according to its experts, exceeds \$1 billion in the country, but their implementation is limited due to problems with infrastructure and regulation. The report says that, given the territories and uneven development of infrastructure, the effect of using drones in the Russian Federation may be greater than in many other countries. Russian manufacturers offer world-class products, but faced with numerous restrictions, they are often forced to focus on foreign markets.

According to a study by Accenture, the results of which were presented in early 2021, the digital transformation of companies accelerated against the background of the pandemic and the emergence of new flexible business models would allow economic growth of \$5.4 trillion.

The study surveyed 1,100 largest companies in 11 countries and 13

industries. The economic effect is calculated based on financial data provided by 810 companies.

The study results showed that even in the face of persisting economic uncertainty, 7 % of companies achieved twice the efficiency and three times higher profitability compared to competitors. Accenture calls these companies “future-ready”. They accelerated the use of digital solutions and upgraded operational models, moving from gradual improvements to massive upgrades.



PARTICIPANTS OF THE SURVEY

Company	Head office location	Web	E-mail	Phone	Specialization	Expertise in areas corresponding to global technological trends
3iTech	Moscow	3itech.ru	info@3itech.ru	(495) 645-4306	Text and media processing products	Artificial Intelligence, Big Data & BI, Smart City
3kex	Krasnoyarsk	3ksigma.ru	info@3ksigma.ru	(902) 945-6719	Basic software development (DBCS, OS, office applications, virtualization tools, programming languages and tools)	Smart City
404studio	Orel	404studio.ru	office@404studio.ru	(4862) 78-2696	Website designing	
4px	Moscow	4px.ru	we@4px.ru	(495) 181-1619	Full Cycle Digital Agency	Artificial Intelligence, Big Data & BI, Blockchain Technology
7 Red Lines	Moscow	7rlines.ru	a.gavrilovich@7rlines.com	(965) 277-9107	Custom software development	AR & VR Development, Big Data & BI
A2B	Ufa	a2b.su	zaripov@a2b.su	(905) 355-9194	Replicated enterprise (institution) management, document flow automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other)	
ABISoft	Saint-Petersburg	abisoft.biz	info@abisoft.spb.ru	(921) 936-1280	Custom software development	
AGNEKO	Moscow region	agneko.com	sales@agneko.com	(495) 660-3590	Custom software development	
AIC	Moscow	en.aic.ru	reception@aic.ru	(499) 350-5674	Intelligent design, plain and simple.	Big Data & BI
ALFASATCOM	Moscow	Alfasatcom.ru	info@alfasatcom.ru	(916) 601-3838	Custom software development	BigData & BI, IoT
Alliance+ (Internet-agency)	Bryansk	alianscompany.ru	sergejkonet@mail.ru	(920) 605-9345	Custom software development	Artificial Intelligence, Big Data & BI
Andsoft	Saint-Petersburg	andsoft.ru	admin@andsoft.ru	(921) 301-2085	Basic software development (DBCS, OS, office applications, virtualization tools, programming languages and tools)	
Aquarius Software	Kostroma	aqua-soft.ru	info@aqua-soft.ru	(910) 660-4618	Basic software development (DBCS, OS, office applications, virtualization tools, programming languages and tools) , Custom software development	

Company	Head office location	Web	E-mail	Phone	Specialization	Expertise in areas corresponding to global technological trends
Aquilon Software Technologies	Kazan	aquilon-st.ru	dir@aquilon-st.ru	(843) 524-7366	Custom software development	Big Data & BI
AraxGroup	Moscow	araxgroup.ru	info@araxgroup.ru	(495) 504-8263	Replicated enterprise (institution) management, document ow automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other)	Artificial Intelligence
Arcadia	Saint-Petersburg	softwarecountry.com	info@softwarecountry.com	(812) 610-5955	Custom software development	AR & VR Development, Artificial Intelligence, Big Data & BI, IoT
A-Real Consulting	Yaroslavl	xserver.a-real.ru	hello@a-real.ru	(800) 555-9297	Information security solutions	
Artezio	Moscow	artezio.com	sales@artezio.com	(495) 981-0531	Custom software development	Artificial Intelligence, Big Data & BI, Blockchain Technology
		<p>Artezio is an international technology company that specializes in professionally solving complex tasks in digital business transformation and custom software development.</p> <p>Artezio is included in the list of the world's best outsourcing service providers (The Global Outsourcing 100) and one of the top developers in several professional categories according to Clutch, the rating and reviews platform. The company's experience and professionalism have been highlighted by a number of international analytical agencies.</p> <p>Among Artezio's clients are customers from Russia, Europe, and the US. We create innovative solutions in various spheres: banking and finance, healthcare and tourism, and build solutions that are used by millions of people around the globe.</p> <p>Artezio's development centers are located in Moscow, Saratov, Nizhny Novgorod, Saint Petersburg, Minsk, Vitebsk, and Mogilev. Additionally, the company has representative offices in the US, Canada, and Poland.</p>				
ASD Technologies	Nizhny Novgorod	asdtech.co	dfeshin@asdco.ru	(963) 672-7526	Developers of personal accounts / self-service portals for fintech, telecom operators and service providers.	Big Data & BI
AssetData	Moscow	assetdata.market	au@assetdata.market	(965) 320-8512	Replicated enterprise (institution) management, document ow automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other)	Artificial Intelligence, Big Data & BI, IoT
ASV	Perm	asv.ru	a.kazymov@asv.ru	(912) 885-3300	Replicated enterprise (institution) management, document ow automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other)	Smart City

Company	Head office location	Web	E-mail	Phone	Specialization	Expertise in areas corresponding to global technological trends
Auriga 	Moscow	auriga.com	pr@auriga.com	(495) 713-9900	Custom software development	AR & VR Development, Artificial Intelligence, Big Data & BI, IoT
<p>Established in 1990, Auriga (www.auriga.com) is recognized as one of the Top-100 leading outsourcing software R&D providers worldwide. Headquartered in Boston, MA with 600+ employees, seven development centers across six time zones, 13+ embedded testing R&D labs and 100+ projects yearly for medical device, automobile and construction tools manufacturers, telecom and power management companies, chip manufacturers, our company offers maximum flexibility in terms of processes, communications, issue resolution while conduct project in strict compliance to quality and risk management standards (ISO 13485).</p>						
Axbit	Samara	axbit.ru	info@axbit.ru	(495) 414-1404	IT Services from site development and mobile applications to comprehensive enterprise automation.	AR & VR Development, Smart City
Axilon Consulting	Moscow	axilon.ru	info@axilon.ru	(916) 815-3499	Information and Analysis Platform (CPM, BI)	Big Data & BI
BACUP IT	Novosibirsk	bacup.ru	a.r.rakhimov@bacup.ru	(383) 325-0771	Custom software development	Artificial Intelligence
BaseALT	Moscow	basealt.ru	org@basealt.ru	(903) 288-1093	Basic software development (DBCS, OS, office applications, virtualization tools, programming languages and tools)	
Bee Pitron	Saint-Petersburg	beepitron.com	all@beepitron.com	(812) 740-1800	Replicated enterprise (institution) management, document flow automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other)	IoT
BellSoft	Saint-Petersburg	bell-sw.com	info@bell-sw.com		Basic software development (DBCS, OS, office applications, virtualization tools, programming languages and tools)	BigData & BI, Blockchain Technology, IoT
BETA	Saint-Petersburg	beta.spb.ru	info@beta.spb.ru	(906) 259-3820	Custom software development	Artificial Intelligence, Big Data & BI, IoT, Smart City
Bitrixoid	Novosibirsk	b-id.ru	info@b-id.ru	(383) 380-5259	Website designing	
Budget and Finance Technologies	Moscow	bftcom.com	info@bftcom.com	(495) 784-7000	Software and consulting solutions for public sector and business	Big Data & BI

Company	Head office location	Web	E-mail	Phone	Specialization	Expertise in areas corresponding to global technological trends
Business Automatics	Moscow	npc.ba	info@pba.su	(495) 221-2965	Build and support complex, intelligent information and analysis systems	Artificial Intelligence, Big Data & BI, Smart City
CEREBRO	Moscow	cerebrohq.com	info@cerebrohq.com	(499) 110-3482	Replicated enterprise (institution) management, document ow automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other)	Big Data & BI
Chilisoft	Moscow	chilisoft.ru	info@chilisoft.ru	(905) 537-2692	Replicated enterprise (institution) management, document ow automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other)	BigData & BI, IoT, Smart City
CodeInside	Penza	codeinside.ru	info@codeinside.ru	(8412) 63-6736	Custom software development	Artificial Intelligence, IoT, Smart City
CommFort software	Novosibirsk	commfort.com	support@commfort.com	(383) 380-4274	Replicated enterprise (institution) management, document ow automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other)	
CrossTech Solutions Group	Moscow	ct-sg.ru	info@ct-sg.ru	(495) 741-8864	Information security solutions	Artificial Intelligence, Big Data & BI, IoT
CVisionLab	Taganrog	cvisionlab.com	info@cvisionlab.com	(905) 454-3313	Custom software development	AR & VR Development, Artificial Intelligence, Big Data & BI, IoT, Smart City
CyberTech	Saint-Petersburg	trikset.com	mikhail@trikset.com	(911) 917-6186	Educational solutions for the study of modern technology and robotics	IoT
Diasoft	Moscow	diasoft.ru	pr@diasoft.ru	(495) 780-7575	Global provider of financial technologies	Artificial Intelligence, Big Data & BI
Digital Mind Development	Krasnoyarsk	dmdevelopment.ru	dmd@dmdevelopment.ru	(3912) 05-0778	Custom software development	Artificial Intelligence
DIP (stp "dip")	Saint-Petersburg	ntp-dip.ru	dip_zenit@mail.ru	(911) 928-8478	Basic software development (DBCS, OS, o ce applications, virtualization tools, programming languages and tools)	
Directum	Izhevsk	directum.ru	office@directum.ru	(3412) 72-1100	Replicated enterprise (institution) management, document ow automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other)	Artificial Intelligence

Company	Head office location	Web	E-mail	Phone	Specialization	Expertise in areas corresponding to global technological trends
DocLab	Ufa	freshdoc.ru	avtushov@freshdoc.ru	(495) 212-1484	Custom software development	Artificial Intelligence
Dom programm	Saint-Petersburg	domprog.com	info@domprog.com	(812) 337-2136	Custom software development	Artificial Intelligence
Ecomash IT	Moscow	ecomash-it.ru	kodeks@ecomash.info	(495) 481-2220	Replicated enterprise (institution) management, document ow automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other)	
Econophysica Ltd	Tomsk	econophysica.com	contactus@econophysica.com	(3822) 90-03-10	Custom software development	Artificial Intelligence, Big Data & BI, Blockchain Technology
eidos	Rostov-on-Don	facebook.com/lubarsky.ru	sergey@lubarsky.ru	(918) 558-3785	Basic software development (DBCS, OS, o ce applications, virtualization tools, programming languages and tools)	Artificial Intelligence, Big Data & BI
EmDev Limited	Saint-Petersburg	emdev.ru	akakunin@emdev.ru	(812) 385-5778	Custom software development	
EPAM Systems	Moscow	epam.com	ask_ru@epam.com	(495) 730-6362	Custom software development	AR & VR Development, Artificial Intelligence, Big Data & BI, Blockchain Technology, IoT, Smart City
ErmineSoft	Novosibirsk	erminesoft.com	denis@erminesoft.ru	(913) 926-2697	Custom software development	AR & VR Development, Artificial Intelligence, IoT, Smart City
EuroMobile	Saint-Petersburg	euromobile.ru	info@euroml.ru	(812) 331-7576	Information security solutions	BigData & BI, IoT, Smart City
eVeloopers	Saint-Petersburg	evelopers.com	info@evelopers.com	(812) 032-4321	Custom software development	
EveryTag	Moscow	everytag.ru	hello@everytag.ru	(495) 008-1695	Information security solutions	
Fast Reports	Rostov-on-Don	fastreport.ru	info@fastreport.ru	(863) 227-0740	Basic software development (DBCS, OS, o ce applications, virtualization tools, programming languages and tools)	
FayGroup	Moscow region	faygroup.ru	info@faygroup.ru	(964) 786-6003	Custom software development	

Company	Head office location	Web	E-mail	Phone	Specialization	Expertise in areas corresponding to global technological trends
ForClasses	Ekaterinburg	moyklass.com	info@moyklass.com	(495) 108-5239	Replicated enterprise (institution) management, document ow automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other)	
Foresight	Moscow	fsight.ru	info@fsight.ru	(495) 137-5498	Replicated enterprise (institution) management, document ow automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other)	Artificial Intelligence, Big Data & BI, IoT, Smart City
GDC Services	Kazan	icl-services.com	pr@icl-services.com	(800) 333-9870	Custom software development	AR & VR Development, Artificial Intelligence, Big Data & BI, IoT
Geoscan Group	Saint-Petersburg	geoscan.aero	info@geoscan.aero	(812) 363-3387	Professional unmanned technologies	AR & VR Development, Artificial Intelligence, IoT
GS Labs	Saint-Petersburg	gs-labs.ru	alexey.goilo@gs-labs.ru	(911) 000-3347	Integrated solutions for the formation of ecosystems for the creation and delivery of digital products based on proprietary technologies	IoT, Smart City
HARMAN Connected Services	Nizhny Novgorod	harman.com	Olga.Sheinfeld@harman.com	(905) 664-1155	Global leader in connected car technology, lifestyle audio innovations, professional audio and lighting solutions, and design and analytics	AR & VR Development, Artificial Intelligence, Big Data & BI, IoT, Smart City
		<p>HARMAN Nizhny Novgorod (founded in 1991, staff – 700 eng.) is following modern trends in Artificial Intelligence, Machine Learning and Natural Language Processing. Our end-to-end software engineering, IoT and data analytics services enable the world's top automotive, mobile and communications, retail and healthcare and software-enabled businesses drive innovation-led growth. HARMAN NN provides cloud technology services, services supporting the Internet of Things and Mobile Applications for Android, iOS, QNX, Java and other mobile platforms. In March 2017, HARMAN became a wholly-owned subsidiary of Samsung Electronics. Customers: Samsung, Jaguar-Land Rover, Mercedes, OnStar/GM, PSA PeugeotCitröen, MSC Cruises, Nielsen, Huawei, Thales, Roche, MainCare, Facebook etc.</p>				
High Technologies Center	Izhevsk	htc-cs.ru	dpletnev@htcmail.ru	(906) 818-7668	Custom software development	Artificial Intelligence, Blockchain Technology
IBIK LLC	Moscow	ibik.ru	director@ibik.ru	(977) 261-1668	Basic software development (DBCS, OS, o ce applications, virtualization tools, programming languages and tools)	
IceRock Development	Novosibirsk	icerockdev.com	info@icerockdev.com	(495) 109-7329	Custom software development, Mobile applications	Blockchain Technology, IoT

Company	Head office location	Web	E-mail	Phone	Specialization	Expertise in areas corresponding to global technological trends
Infoopteka	Moscow	infoopteka.com	office@infoopteka.com	(495) 150-3426	Replicated enterprise (institution) management, document ow automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other)	
INFOPRO	Moscow	info-pro.ru	post@info-pro.ru	(800) 600-2401	Information security solutions	BigData & BI, IoT, Smart City
Information Systems and Services	Novosibirsk	isands.ru	ashovkun@isands.ru	(913) 377-9002	Replicated enterprise (institution) management, document ow automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other)	Smart City
Inostudio Solutions	Taganrog	inostudio.com	russoft@inostudio.com	(8634) 32-0318	Custom software development	AR & VR Development
INOVENTICA Technology	Moscow	inoventica-tech.ru	info@inoventica-tech.ru	(495) 646-7308	Information security solutions	
Inreco LAN	Vladimir	inrecolan.com	sergey.pyatigorskiy@inrecolan.com	(4922) 44-4090	Custom software development	Artificial Intelligence
INTERFACE	Novosibirsk	interface.nsk.su	interface@interface.nsk.su	(913) 912-2216	System Integration	Big Data & BI
Internet-Frigate	Novocherkassk	ifrigate.ru	main@ifrigate.ru	(86352) 2-4110	Navigation systems & Geographic information systems (GIS)	Artificial Intelligence, Big Data & BI, IoT, Smart City
IQ300	Naberezhnye Chelny	IQ300.ru	info@iq300.ru	(927) 480-6426	Replicated enterprise (institution) management, document ow automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other)	Blockchain Technology, Smart City
iSpring	Yoshkar-Ola	ispring.com	valentina.bulygina@ispring.com	(960) 099-0074	Online Training Software	
ISPsystem	Irkutsk	ispsystem.ru	k.petrunina@ispsystem.com	(914) 001-7106	Embedded software (equipment, devices)	
IT "Design Soft"	Ekaterinburg	d-soft.ru	info@d-soft.ru		Replicated enterprise (institution) management, document ow automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other)	
IT Pro	Moscow	biqube.ru	mail@biqube.ru	(499) 347-8480	Custom software development	Artificial Intelligence, IoT

Company	Head office location	Web	E-mail	Phone	Specialization	Expertise in areas corresponding to global technological trends
IT Universe	Samara	it-universe.ru	info@it-universe.ru	(846) 979-8080	Software development	Artificial Intelligence
Ittransition	Saint-Petersburg	ittransition.com	info@ittransition.com	(495) 640-8937	Custom software development	AR & VR Development, Artificial Intelligence, Big Data & BI, Blockchain Technology, IoT
IVCS Ltd	Innopolis	iva-tech.ru	m.tuktarova@iva-tech.ru	(916) 794-2562	Developers of innovative IT solutions for building a modern digital infostructure	Artificial Intelligence
IW Group	Simferopol	iw-group.pro	alexey@ideas-world.com	(978) 015-6915	Custom software development, Mobile applications	
IZZIO	Moscow	izz.io	info@izz.io	(905) 520-3080	Custom software development	Artificial Intelligence, Big Data & BI, Blockchain Technology, IoT
		<p>IZZIO, LLC is a software design and development studio for the digital transformation of different-sized businesses and gov agencies, which specialize in web and mobile applications, high-load information systems, developing and embedding CIPF in the software. The company creates projects based on various technologies: blockchain, AI, Big data, IoT, as well as has a number of own developments for different areas. IZZIO, LLC has an indefinite Russian Federal Security Service (FSB) license to develop solutions using CIPF.</p> <p>The flagship product of the company (in the List of Russian software) is the IZZIO blockchain platform with an integrated module based on GOST (Russian National Standard) cryptography: an infrastructure based on the LCPoA consensus algorithm and a set of tools that allow you to easily and cost-effectively create various products based on blockchain technologies.</p>				
JoyCraft Games	Saint-Petersburg	joycraft-games.com	company@joycraft-games.com	(981) 862-7328	Computer games	
KAMIS	Saint-Petersburg	kamis.ru	info@kamis.ru	(812) 274-3522	Replicated enterprise (institution) management, document ow automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other)	Smart City
King Bird Studio	Moscow	kingbird.ru	ask@kingbird.ru	(495) 540-5229	Mobile applications	AR & VR Development, Artificial Intelligence, Big Data & BI, Blockchain Technology, IoT, Smart City
KODEKS	Saint-Petersburg	kodeks.ru	kodeks@kodeks.ru	(812) 740-7887	Replicated enterprise (institution) management, document ow automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other)	AR & VR Development, Artificial Intelligence

Company	Head office location	Web	E-mail	Phone	Specialization	Expertise in areas corresponding to global technological trends
KOMINTEL	Saint-Petersburg	kom-intel.ru	konstvkv@kom-intel.ru	(812) 931-1272	Custom software development	Big Data & BI
Kosta	Saint-Petersburg	kostasoft.ru	info@kostasoft.ru	(812) 320-0607	Replicated enterprise (institution) management, document ow automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other)	
LABS	Moscow	advalange.ru	info@advalange.com	(499) 350-2599	Embedded software (equipment, devices)	
LANBilling	Moscow	lanbilling.ru	itdep@lanbilling.ru	(495) 795-0677	Developers in the billing system for telecom operators	
Lanit-Tercom	Saint-Petersburg	lanit-tercom.ru	contact@lanit-tercom.com	(931) 330-9982	Custom software development	AR & VR Development, Artificial Intelligence, Big Data & BI, Blockchain Technology
Lartech	Saint-Petersburg	lar.tech	info@lar.tech	(812) 339-4501	Turnkey solutions for a wide variety of industries where long-distance data transmission is required, high autonomy, ease of installation and quick payback of implementation	IoT, Smart City
League Of Code	Saransk	leagueofcode.ru	welcome@Lcode.pro	(963) 149-1199	Replicated enterprise (institution) management, document ow automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other)	
Leantech	Omsk	leantech.ai	info@leantech.ai	(923) 676-0266	Custom software development	Artificial Intelligence, Big Data & BI, Blockchain Technology
Lexema	Ufa	lexema.ru	market@lexema.ru	(3472) 84-7000	Development in the field of ai and robotization of business processes	Artificial Intelligence
LOGUS	Moscow region	logus.ru	ecology@logus.ru	(903) 664-1923	Custom software development	
Luxoft	Moscow	luxoft.com	Vvereschagin@luxoft.com	(495) 967-8030	Custom software development	Artificial Intelligence, Big Data & BI, Blockchain Technology, IoT
Makves Group	Moscow	makves.ru	info@makves.ru	(495) 150-5406	Software for audit and IT Resources monitoring	

Company	Head office location	Web	E-mail	Phone	Specialization	Expertise in areas corresponding to global technological trends
Media technology	Saint-Petersburg	sigmasms.ru	integration@sigmasms.ru	(904) 615-4608	Content provider for A2P text and multimedia messaging	
Media-tel	Moscow	media-tel.ru	info@media-tel.ru	(499) 272-7658	Custom software development	Artificial Intelligence, Big Data & BI, IoT
Megaputer	Moscow	megaputer.ru	info@megaputer.ru	(499) 753-0129	Basic software development (DBCS, OS, office applications, virtualization tools, programming languages and tools)	Artificial Intelligence, Big Data & BI
Monolit-Info	Saint-Petersburg	monolit.com	alex@monolit.com	(921) 937-8542	Replicated enterprise (institution) management, document flow automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other)	
M-Social	Bryansk	msocialproduction.ru	a.trishin@msocialproduction.com	(962) 131-6236	Custom software development	BigData & BI, IoT
Nexign, JSC	Saint-Petersburg	nexign.com	office@nexign.com	(812) 326-1299	Custom software development	Blockchain Technology, IoT
Noviy Disk	Moscow	nd.ru	e-learning@nd.ru	(495) 785-6514	Custom software development	AR & VR Development, Artificial Intelligence, Smart City
Oggetto	Taganrog	oggetto.ru	paul@oggettoweb.com	(989) 612-7000	Custom software development	
OKTET Labs	Saint-Petersburg	oktetlabs.ru	info@oktetlabs.ru	(812) 335-4801	Custom software development	
Overmobile LLC	Novosibirsk	overmobile.ru	finance@overmobile.ru	(913) 798-0533	Computer games	
Paradigma Soft	Saint-Petersburg	paradigma-soft.ru	info@paradigma-soft.ru		Custom software development, Replicated enterprise (institution) management, document flow automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other)	
Pikyug	Novorossiysk	pikyug.ru	py01@py01.ru	(8617) 61-0175	Custom software development	Big Data & BI
PiterSoft	Saint-Petersburg	piter-soft.ru	info@piter-soft.ru	(812) 333-0860	Replicated enterprise (institution) management, document flow automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other)	

Company	Head office location	Web	E-mail	Phone	Specialization	Expertise in areas corresponding to global technological trends
Polymatica	Moscow	polymatica.ru	sales@polymatica.ru	(495) 748-8484	Replicated enterprise (institution) management, document ow automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other)	Artificial Intelligence, Big Data & BI, IoT
Printum	Moscow	http:printum.io	dd@printum.io	(963) 766-2233	Replicated enterprise (institution) management, document ow automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other)	Artificial Intelligence, IoT
 PROMT	Saint-Petersburg	promt.ru	corporate@promt.ru	(812) 655-0350	Replicated enterprise (institution) management, document ow automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other)	Artificial Intelligence, Big Data & BI
<p>PROMT is one of the world's leading developers of linguistic IT-solutions for enterprise-level clients and private users since 1991. The company is among the few machine translation software vendors from Europe and one of the TOP-10 companies globally.</p> <p>The company has thousands of corporate clients all over the world, such as Amadeus, Nornickel, Russian Railways, PayPal, Gazprom, LUKOIL, SpanishDict, Siemens, Mail.ru, TAdviser.</p> <p>PROMT uses the latest advances in the field of AI to create solutions for all popular platforms – Windows, MacOS, Linux, iOS, Android. PROMT MT software supports more than 50 languages and integrates with Microsoft applications and CAT-systems (SDL Trados, Memsource, Across).</p>						
Qligent	Nizhny Novgorod	qligent.ru	info@qligent.ru		Replicated enterprise (institution) management, document ow automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other)	Big Data & BI
QNIUM LLC	Moscow	qniium.ru	office@qniium.ru	(495) 988-0764	Custom software development	AR & VR Development, Artificial Intelligence, IoT
RAIDIX	Saint-Petersburg	raidix.com	request@raidix.com	(812) 622-1680	Basic software development (DBCS, OS, o ce applications, virtualization tools, programming languages and tools)	Artificial Intelligence, Big Data & BI, IoT, Smart City
Raketa	Vladivostok	raketa.world	hello@raketa.travel	(925) 655-9000	Replicated enterprise (institution) management, document ow automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other)	

Company	Head office location	Web	E-mail	Phone	Specialization	Expertise in areas corresponding to global technological trends
RCO	Moscow	rco.ru	info@rco.ru	(495) 287-9887	Custom software development	Artificial Intelligence
RDTEX	Moscow	rdtex.ru	marketing@rdtex.ru	(495) 995-0999	IT Services	Artificial Intelligence, Big Data & BI, IoT
RED Soft	Moscow	red-soft.ru	info@red-soft.ru	(495) 285-6268	Basic and application software	
		<p>RED SOFT — Russian developer and provider of IT solutions and services; Skolkovo resident, member of the "Domestic Software" and RUSOFT associations. The company implements integrated projects in the field of data storage and management using its own technology stack. RED SOFT is an efficient team with more than 15 years experience in development in the Russian public and commercial sectors. RED SOFT has its own product line: RED OS, Red Database DBMS, Red Platform, Red Virtualization and others. All products are listed in the Unified Register of Russian Software and Databases. Among the company's customers there are more than 20 government bodies, including the Federal Bailiff Service of Russia, the Prosecutor General's Office of the Russian Federation and the Ministry of Defense of the Russian Federation. Projects are being actively implemented in the regions.</p>				
Reksoft	Moscow	reksoft.ru	rfi@reksoft.ru	(495) 926-1771	Custom software development	Artificial Intelligence, Big Data & BI, Blockchain Technology, IoT, Smart City
RIT automation	Novosibirsk	rit-it.com	lb@rit-it.com	(913) 700-8372	Embedded software (equipment, devices)	
RNDSOFT	Rostov-on-Don	rnds.pro	es@rnds.pro	(499) 110-9973	Replicated enterprise (institution) management, document ow automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other)	AR & VR Development, Artificial Intelligence, Blockchain Technology, Smart City
Roonyx	Rostov-on-Don	roonyx.tech	vladimir@roonyx.tech	(909) 413-4138	Custom software development	Artificial Intelligence, Blockchain Technology
Rubius	Tomsk	rubius.com	info@rubius.com	(3822) 97-7772	Custom software development	AR & VR Development, Artificial Intelligence, Big Data & BI, Smart City
RunCall	Saint-Petersburg	runcall.ru	info@runcall.ru	(911) 949-4560	Custom software development	Artificial Intelligence
RuNetSoft	Saint-Petersburg	runetsoft.ru	mailbox@runetsoft.ru	(812) 337-2414	Website designing	AR & VR Development, Artificial Intelligence, Smart City

Company	Head office location	Web	E-mail	Phone	Specialization	Expertise in areas corresponding to global technological trends
RusBITech-Astra 	Moscow	astralinux.ru	sfedorov@astralinux.ru	(495) 369-4816	Basic software development (DBCS, OS, office applications, virtualization tools, programming languages and tools)	Smart City
<p>Astra Linux Group is one of the leaders in the Russian information technology market in the area of developing software and information security tools – operating systems of the Astra Linux family and virtualization platforms. The Company has been operating since 2008. Today Astra Linux team consists of more than 300 highly qualified developers and technical support staff.</p> <p>Astra Linux solutions are actively used to ensure security of Critical Information Infrastructure (CII) facilities.</p> <p>The company is a member of ‘Russoft’ and ARPP Software Developers association. Winner of international & local awards.</p>						
SDI SOFT	Moscow	sdisoft.ru	info@sdisoft.ru		Replicated enterprise (institution) management, document flow automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other)	Big Data & BI
Searchinform 	Moscow	searchinform.com	info@searchinform.ru	(495) 721-8406	Complex information protection	
<p>SearchInform is a leading Russian developer of information security solutions. Today, the company’s current list of offered products includes instruments for comprehensive protection against internal threats: SearchInform Risk Monitor, SearchInform DLP, SearchInform SIEM, SearchInform FileAuditor – a DCAP solution, SearchInform Database Monitor – a DAM solution, SearchInform ProfileCenter based on automated profiling, TimeInformer for time-tracking and control of relevance of used websites and applications, as well as offers software as a service.</p> <p>SearchInform products are suitable for companies from all industries, where personal data is stored and processed, as well as commercial, medical, state secret, trade secret and know-how information is kept. The competence of the company is confirmed by a perpetual license from the Center for Licensing, Certification and Protection of State Secrets of the Federal Security Service of the Russian Federation, licenses from the Federal Service for Technical and Export Control of Russia, the products are included in the Unified Register of Russian Programs.</p>						
SFERA	Moscow	sphaera.ru	info@sphaera.ru	(495) 672-7036	Replicated enterprise (institution) management, document flow automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other)	BigData & BI, Smart City
SimbirSoft	Ulyanovsk	simbirsoft.com	info@simbirsoft.com	(800) 2009924	Custom software development	BigData & BI, Blockchain Technology, IoT, Smart City

Company	Head office location	Web	E-mail	Phone	Specialization	Expertise in areas corresponding to global technological trends
Sibedge 	Tomsk	sibedge.com	contacts@sibedge.com	(3822) 70-1841	A full-cycle global software development company focusing on an approach to business transformation that puts people first	
		<p>Sibedge is a globally distributed software engineering company that puts people first. We combine our innovative technology vision with our clients' business objectives to help them have a smooth journey to digital transformation. For over 15 years, we have successfully implemented over 350 projects across more than 15 countries. We have offices in San Francisco, CA, and Moscow, Saint Petersburg and Tomsk, Russia. In 2019, the company opened a representative office in Australia.</p>				
SIMETRA	Saint-Petersburg	simetrargroup.ru	moscow@simetrargroup.ru		Solution for dispatching, monitoring and modeling transport and logistics flows	Artificial Intelligence, Big Data & BI, Smart City
Smart Design	Saint-Petersburg	smddev.com	info@smddev.com	(921) 932-7150	Custom software development	Artificial Intelligence, Big Data & BI, IoT
Smart Life	Moscow region	smart-life.pro	v.mironov@smart-life.pro	(968) 867-1162	Embedded software (equipment, devices)	BigData & BI, Smart City
SMS-Information technologies	Samara	sms-it.ru	info@sms-it.ru	(927) 263-8621	Proprietary software and creation of solutions for energy and industrial enterprises.	IoT
SoftInform	Tomsk	ssp-soft.com	sales@ssp-soft.com	(906) 950-2550	Custom software development	
SoftLab-NSK	Novosibirsk	softlab-nsk.com	trav@sl.iae.nsk.su	(913) 915-5915	Replicated enterprise (institution) management, document ow automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other)	AR & VR Development
Sonda Pro	Miass	sonda.ru	sonda@sonda.ru	(35135) 3-0677	Custom software development	Artificial Intelligence, IoT, Smart City
Statanly Technologies	Saint-Petersburg	statanly.com	hello@statanly.com	(921) 875-2396	Custom software development	Artificial Intelligence, Big Data & BI, Smart City
Supl.biz	Tomsk	supl.biz	Evg@supl.biz	(913) 823-5866	Replicated enterprise (institution) management, document ow automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other)	Artificial Intelligence, Big Data & BI
SWDC RTSOFT	Moscow	rtsoft.ru	rtsoft@rtsoft.ru	(495) 967-1505	Custom software development, Embedded software (equipment, devices)	AR & VR Development, Artificial Intelligence, IoT, Smart City

Company	Head office location	Web	E-mail	Phone	Specialization	Expertise in areas corresponding to global technological trends
SWTECN	Nizhny Novgorod	swtecnn.com	valery.kalachev@swtecnn.com	(903) 060-7607	Custom software development	
T8	Moscow	t8.ru	info@t8.ru	(499) 271-6161	Telecommunication equipment	Artificial Intelligence, Smart City
		<p>T8 is Russian developer and manufacturer of the dense wavelength telecommunications equipment (DWDM).</p> <p>Activities:</p> <ul style="list-style-type: none"> – developing and manufacturing of DWDM equipment – optical networks design – R&D in the field of laser physics and optical electronics – developing and manufacturing of the radio-photonic component base <p>The DWDM platform includes equipment with 100-600G speed over the channel. The equipment is used for design of metro and backbone networks, connections between data-centers, and it is adapted to the new generation 5G networks. The main clients are telecom operators, IT companies, data centers, system integrators, government and industrial enterprises.</p>				
TAP	Tomsk	tomskasu.ru	info@tomskasu.ru	(999) 620-2759	Custom software development	IoT
Telebreeze	Tomsk	telebreeze.com	andrey.nikitin@telebreeze.com	(906) 948-3848	Solutions for video broadcasting platforms	Artificial Intelligence
Telecontact	Moscow	telecontact.ru	tele@telecontact.ru	(495) 744-5543	Contact Center Software	
Test IT	Moscow	testit.software	artem.kostriukov@testit.software	(950) 863-7003	Replicated enterprise (institution) management, document ow automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other)	Artificial Intelligence
Tezis LLC	Ufa		TezisSoft@mail.ru	(996) 404-4231	Replicated enterprise (institution) management, document ow automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other)	Artificial Intelligence
Thales	Moscow	thales-sentinel.ru	mikhail.chukhlomin@thalesgroup.com	(926) 996-4225	Information security solutions	IoT
Transset	Moscow	transset.ru	info@transset.ru	(499) 649-4668	Own platform - providing access, technical support	Artificial Intelligence, Big Data & BI, IoT
TrueConf	Moscow	trueconf.ru	pr@trueconf.ru	(495) 698-6066	Basic software development (DBCS, OS, o ce applications, virtualization tools, programming languages and tools)	Artificial Intelligence, Smart City

Company	Head office location	Web	E-mail	Phone	Specialization	Expertise in areas corresponding to global technological trends
Tsifrovyye kontrol'nyye tekhnologii	Rostov-on-Don	mt-r.ru	am@mt-r.ru	(800) 222-2061	Replicated enterprise (institution) management, document ow automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other)	AR & VR Development, Artificial Intelligence, Smart City
T-Soft	Saint-Petersburg	t-soft.ru	office@t-soft.ru	(812) 665-5105	Development of computer training systems	AR & VR Development, Artificial Intelligence, Big Data & BI, Smart City
UC Transport	Moscow	podkontrolem.online	info@podkontrolem.online	(499) 677-1703	Replicated enterprise (institution) management, document ow automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other)	Smart City
Umbrella Alliance	Taganrog	umbrellait.com	hello@umbrellait.com	(929) 815-0949	Website designing	AR & VR Development, Artificial Intelligence, Big Data & BI, IoT
UNIVERSE-Soft	Tomsk	universe-soft.ru	manager@universe-soft.ru	(495) 150-2152	Replicated enterprise (institution) management, document ow automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other)	
UserGate	Novosibirsk	usergate.com	kk@usergate.com	(926) 975-6796	Information security solutions	Artificial Intelligence
Usetech	Moscow	usetech.ru	info@usetech.ru	(495) 660-5048	Custom software development	AR & VR Development, Artificial Intelligence, Big Data & BI, Blockchain Technology, IoT, Smart City
Valmaster	Saint-Petersburg	valmaster.ru	info@valmaster.ru	(812) 329-4459	Replicated enterprise (institution) management, document ow automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other)	Smart City
Videomatrix	Ekaterinburg	videomatrix.ru	vmx@videomatrix.ru	(343) 204-7330	Developers in solutions using video analytics, neural networks and artificial intelligence in production	Artificial Intelligence, Smart City
Visiology	Moscow	visiology.su	ivan@visiology.com	(495) 133-6290	Replicated enterprise (institution) management, document ow automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other)	Artificial Intelligence, Big Data & BI

Company	Head office location	Web	E-mail	Phone	Specialization	Expertise in areas corresponding to global technological trends
VR Concept	Moscow	vrconcept.net	cc@vrconcept.net	(495) 212-1147	Replicated enterprise (institution) management, document ow automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other)	AR & VR Development
Web3 Tech	Moscow	web3tech.ru	ikuzmichev@wavesenterprise.com	(910) 450-2686	Custom software development	Blockchain Technology
WebAnt	Rostov-on-Don	webant.ru	v@webant.ru	(960) 466-0100	Mobile applications	AR & VR Development, Artificial Intelligence, Blockchain Technology, IoT, Smart City
Webpraktik	Rostov-on-Don	webpraktik.ru	info@webpraktik.ru	(995) 989-0179	Website designing	Artificial Intelligence, Big Data & BI
WESMA	Moscow	wesma.ru	manager@wesma.ru	(495) 118-2474	Website designing	Smart City
WiFly	Saint-Petersburg	wifly.net	admin@wifly.net		Marketing and monetization solution for Wi-Fi networks	BigData & BI, IoT
YASP	Saint-Petersburg	yasp.ru	welcome@yasp.ru	(812) 974-7403	Replicated enterprise (institution) management, document ow automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other)	Artificial Intelligence, Big Data & BI, IoT, Smart City
YouLK	Novosibirsk	youlk.ru	info@youlk.ru	(383) 209-3430	Replicated enterprise (institution) management, document ow automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other)	Artificial Intelligence, Smart City



RUSSOFT Association
199034, Russia, St. Petersburg,
Birzhevaya lane, 16
info@russoft.org
www.russoft.org