



**GEOGRAPHY
AND VERTICAL
MARKETS
OF RUSSIAN
SOFTWARE
COMPANIES**



GLOBAL IT TRENDS SHOULD NOT BE OMIT

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Global spending on information technology will exceed \$4 trillion in 2021 – this forecast was announced by the research company Gartner. According to IDC, Russia's share of IT consumption currently amounts to RUB 1.8 trillion, which is approximately 0.6 % of the global volume. These figures speak volumes to Russian IT companies about the economic prospects of focusing on the global market. Moreover, exporting in-house developments is much more effective for the development of the Russian economy than the "export" and massive brain drain of IT specialists abroad.

Promising Export Destinations

The trend for import-independent solutions supported by the Russian government contributes to the growth of the domestic IT industry. Russian companies are gaining experience and increasing their turnover. At first glance, 140 million residents across Russia may seem like a large IT market. However, in the coming years, many domestic developers will "outgrow" the limits of the national market and take the export route. So, IT companies should not only focus on the needs of Russian consumers, but also keep track of global IT trends. In my opinion, there are several in-demand areas, including information security;

productivity; solutions for big data analysis and processing; collaboration products; services that facilitate interaction between citizens and the government (similar to our government services); and distance learning products.

In terms of the geographical spread of IT solutions exports, Russian developers should pay attention to the emerging markets of Africa, Latin America, and Southeast Asia. Russian software can also be in demand in regions that, due to political circumstances, cannot or do not want to buy software in the West or in the USA, such as certain countries in the Middle East.

MyOffice International Experience

MyOffice began to actively expand in the international market in 2019. with African countries becoming our first customers. We chose this particular region for the following reasons:

- Russia has a solid reputation as a reliable economic and business partner in Africa;
- Our time zones are close, so we can provide technical support from Russia;
- Linguistic accessibility: business communications in African countries are mainly carried out in English and French;

- There is low competition in the software market.

In the short time we have been operating in the African market, we have already established business relations with several countries. We have entered into commercial agreements with the Republic of Burundi worth \$3 million, and have agreed to supply our software to the Republic of Cameroon (1 million licenses), the Republic of Guinea (300.000 licenses) and the Republic of Djibouti (300.000 licenses). We have also reached agreements with the Republic of the Congo regarding the export of Russian office software.

Our export experience suggests that, when buying foreign software, customers pay great attention to data security and preserving the information sovereignty of their country. For our African partners, MyOffice IT solutions turned out to be the most attractive in comparison with other foreign counterparts, because we provide the possibility of deploying private clouds on customers' servers. This means that data can be stored inside the country, in comparison to Google, for example, which operates only through its own clouds, and means that the data processing centers are located outside of Africa.

Russian market and global presence

In 2018–2019, the sales growth rate of software companies in the domestic market and abroad were different, but the difference was insignificant. In 2018, the revenue received in Russia grew faster, whereas in 2019 – the one received abroad. At the end of 2020, full parity was established: sales growth, both in the domestic market and outside Russia, turned out to be approximately 16 % in ruble terms.

In terms of dollars and by rounding to tenths of a percent, sales in the domestic market have a small advantage in the terms of growth rates. They added 4.5 %, and foreign sales – 4.3 %. Nevertheless, we should not talk about some kind of reorientation of the industry to the domestic market.

Shift of interest in working abroad and in Russia can also be monitored by the share of companies that do not have export income at all. According to the results of 2017, there were 24.8 % of the surveyed companies, and according to the results of 2018, about 1.5 times more – 35.6 %. At the same time, most of the companies that participated in the survey in the last 2 years showed decrease in the share of exports (including up to 0 %). As a rule, these are small companies working abroad which provided no more than 10–15 % of revenue in 2017. Large developers of custom software have also increased sales in Russia.

In 2019, the share of companies without export income decreased to 14.3 % (it became less than in 2017). However, it should be borne in mind that, firstly, not many companies participated in the 2020 survey (72 questionnaires), and secondly: among them a large percentage (61 %, which is much more than 20–30 % in previous years) were the members of the RUSSOFT Association, which historically was the association of software exporters.

Therefore, the increase in the share of respondents who do not have export contracts by the end of 2020 to 29.6 % does not indicate a clearly increased interest in the domestic market. This is due to the fact that it is especially difficult (or even impossible) for small companies that have not yet earned a reputation abroad to find customers in other countries and conclude contracts online. Such companies (with a turnover of less than 320 million rubles) increased export revenue by 6.5 %, and larger ones – by 12.8 %.

According to an expert assessment based on the experience of conducting various studies, at least 20 % of software development companies in Russia are not, in principle, ready to enter foreign markets. Most likely, more than 30 % of companies in the entire industry had no export income in 2020 for various reasons, because the survey traditionally covers mainly exporters.

At the height of the pandemic, in mid-2020, RUSSOFT made the following prediction: “Companies that have managed to gain a foothold in foreign markets will have indicators no worse than those that did not work outside Russia and neighboring countries. Reorienting to the domestic market from outside is much easier than vice versa.” This forecast turned out to be correct and is already the rule. Only in times of the rapid growth of the internal IT market (by tens of percent) could this rule have exceptions in some years.

Separately it is worth considering the attitude of companies with an export share of less than 25 % toward foreign markets. Such a share indicates that the main income is provided by work in Russia and in neighboring countries. This category previously included at least 60 % of all surveyed companies (according to the results of the 2019 survey – 64 %).

In 2020, the share of such companies turned out to be lower (52 %), however also due to the fact that the companies that successfully operate abroad participated in the survey. In 2021, 63 % of the surveyed companies turned out to belong to this category, which is slightly lower the level of 2019.

Thus, the desire to expand in foreign markets covers a wide range of software companies in Russia, but with limited resources they have to choose between real opportunities to increase sales in the domestic market and hypothetical prospects for entering new foreign markets, while against the background of anti-Russian sanctions. The choice is more often made in favor of working in the Russian market. A very large number of companies still have the resources to enter new foreign markets, not to the detriment of work in the domestic market. At the same time, in recent years this circle has been narrowing.

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16 %

sales growth in ruble terms,
both in the domestic market
and outside Russia

Comparison of work in Russia and abroad for product and service companies

In the last three years (2018–2020), developers of product software are better able to expand their business at the expense of foreign markets. This new phenomenon is neither affected by fluctuations in the ruble against the dollar, nor by the pandemic. According to the results of 2020, their foreign sales increased by 5 %, and within Russia – by 0.7 % (in dollar terms).

Apparently, the Russian market for product companies is already too cramped. However, import substitution is very active in some of its segments. For example, this applies to basic office software – operating systems and office applications. Companies operating in this segment can grow by tens and even

hundreds of percent per year without going abroad, but their combined turnover relative to all developers of replicated solutions is not yet large.

Product companies are more affected compared to service companies by the policies of several countries that impose bans on Russian developers. Nevertheless, so far foreign markets provide more opportunities to increase the sales of software products than the Russian one.

Service companies are faster to increase sales in the domestic market. Their strong driver is the trend towards digital transformation, which does not have common solution even for enterprises

in certain economy sector, and therefore every time it requires a unique approach to changing the business model and management system. Service companies are also seriously affected by fluctuations in the ruble against the dollar. In previous years, they could sharply increase foreign sales with a serious devaluation of the ruble, which allowed the international market to have an additional competitive advantage at the cost of labor, which is formed in rubles. Over the past three years, there has been no such obvious dependence on currency fluctuations. At the end of 2020, the ruble depreciated significantly – by about 12 %, but in the domestic market, developers of custom software increased sales by 11.5 %, and in external – by 0.5 % (in dollars).

Distribution of sales by macro-regions of the global market

According to the results of 2015, RUSSOFT for the first time presented data on sales of Russian software companies in various macro-regions of the world. In previous years, the importance of certain regions of the global market was estimated entirely by the number of companies surveyed that indicated their presence in a particular part of the world.

Sales by global macro-regions are calculated by the importance of regional markets for respondents.

It should be noted that software developers can receive income directly from the country which they worked in, or through an offshore zone, or through regional hubs (for example, Cyprus, Luxembourg, Hong Kong, Singapore). A higher indicator of Ukraine in the calculations of RUSSOFT compared to

the data of the Central Bank of Russia indicates that it is difficult for Russian companies to work directly in the market of this country. They sell software there under the guise of European developers.

It can also be assumed that respondents possess branches (including development centers) which the head office makes settlements with under different articles, not under the article “computer services”. In addition, customers from neighboring countries often have offices in Russia, which means they can pay for the supplied software from the account of a Russian legal entity.

Therefore, the share of the “Near Abroad” countries of 7.3 % in 2020, according to RUSSOFT calculations, most likely is seriously underestimated. If we consider the market of Russia and neighboring

countries (for all types of products and services), then the share of neighboring countries will be approximately 30 %. For software, this share is likely to be less. This can be explained by the fact that the Russian IT market is much more developed than in neighboring countries, but still much more than 7.3 %.

Thus, RUSSOFT calculations, despite the assumed large error, make it possible to see a close-to-real distribution of foreign sales in various country markets, if appropriate corrections are made. At the same time, the results of calculations in different years allow to determine random deviations. Accuracy is also improved in the process of aggregating indicators; for example, when combining all markets of Western countries, post-Soviet states and all markets new to Russian companies.

Distribution of sales in 2016–2020 of Russian software companies by macro-regions of the global market, % of total turnover (calculation on the assessment of the significance of specific markets)

	2016	2017	2018	2019	2020
Russia	37 %	49.5 %	55.3 %	52.4 %	52.5 %
Belarus	1.9 %	1.0 %	0.8 %	—	—
Ukraine	2.5 %	1.2 %	1.3 %	—	—
Other countries of the former USSR	5.2 %	2.9 %	3.3 %	—	—
Near Abroad (post-Soviet states)	—	—	—	4.7 %	7.3 %
United States and Canada	17.7 %	17.1 %	13.0 %	16.3 %	13.0 %
Germany and German-speaking countries	9.2 %	8.4 %	8.1 %	—	—
Scandinavia and Finland	3.4 %	1.5 %	1.7 %	—	—
Other Western European countries	8.9 %	8.5 %	6.4 %	—	—
Central and Eastern European countries	3.2 %	1.5 %	1.7 %	—	—
Europe (without Russia and Near Abroad)	—	—	—	13.6 %	12.4 %
Southern and Eastern Asia	5.5 %	4.0 %	4.0 %	3.8 %	6.5 %
South and Central America	1.8 %	1.5 %	1.6 %	2.6 %	2.7 %
Africa	1.1 %	0.5 %	0.6 %	2.1 %	1.4 %
Australia	1.6 %	0.9 %	0.9 %	2.4 %	0.7 %
Middle East countries	1.2 %	1.3 %	1.4 %	2.1 %	3.5 %

It is difficult to make direct comparison of RUSSOFT 2019 data with similar data of the previous few years. First, because the division of the world market has changed. Second, due to the fact that the calculations were carried out in a different selection of companies (in 2019, the revenues of several large companies that ceased to be Russian according to the RUSSOFT classification were

not taken into account). In addition, a slightly changed method of calculating total turnover and total foreign sales was applied.

The distribution of 2020 is calculated according to the data obtained as a result of a full-fledged survey (unlike the distribution of 2019). Therefore, it is more correct to make a comparison

of data for 2020 with data for 2018, but to take into account a slightly changed methodology.

Traditional markets for the Russian IT industry are Western World and Post-Soviet States. “Western World” is presented in the general table with the distribution of sales by macro-regions as follows: “USA or Canada”, “Germany

and German-speaking countries”, “Scandinavia and Finland”, “Other Western European countries”, “Australia” and “ Central and Eastern European countries”, which are now becoming closer to the Western world (especially since they are all part of the EU).

Belarus, Ukraine, Kazakhstan and Uzbekistan are separately allocated in the post-Soviet states, except for Russia.

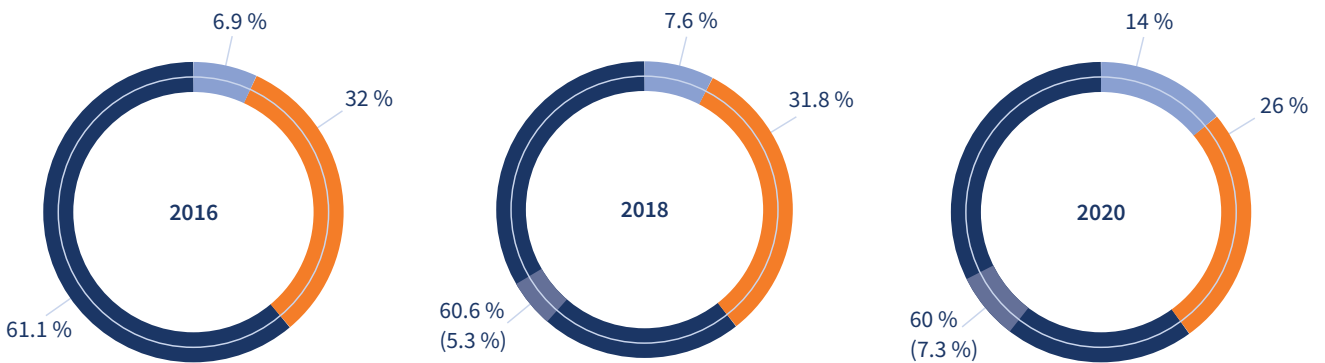
“New Markets” are divided into the following macro-regions: “Southern and Eastern Asia”, “Africa”, “South and Central America” and “Middle East”.

Grouping markets allows to improve the accuracy of calculations. In recent years, we can talk quite confidently about the growth of the share of “Russia and other countries of the former USSR” and “New Markets” while reducing the share

of “Western World”. The growth of the Western World market indicator in 2017 can be considered an episode related to the devaluation effect.

Such changes are confirmed by data on a significant increase in sales in the domestic market and an increase in the number of news about activity in the “New Markets”.

Distribution of sales of Russian software companies by market groups



- Russia and Near Abroad (in parentheses – Near Abroad only)
- Western World
- New Markets

Presence of Russian software companies in foreign markets

Interest in different markets can also be estimated by the share of companies in these markets, as well as by assessing the importance of each market (whether it is a key one or only individual projects are implemented in it).

According to the results of 2020, the most interesting markets for all software industry enterprises are Russia (can be combined with Near Abroad), the USA/Canada, Europe as a whole (especially Great Britain and Germany with German-speaking countries). At least 10 % of the companies surveyed consider

these markets as key ones. The Asian region does not yet belong to them, but almost 22 % of the surveyed companies are already present in the markets of Southern and Eastern Asia. In the future, with existing trends, there should be no less of them than in the United States.

Europe still lags behind the United States in terms of the share of companies that consider the corresponding market to be a key one (12.6 % versus 16.0 %), but is already ahead with a noticeable gap in terms of presence (42.2 % versus 31.5 %).

There are many markets where there is a fairly large share of surveyed companies, but only a small part of software developers recognized them as key ones. These markets can be considered as potentially promising.

The presence of software companies in domestic and foreign markets in 2020 with assessment of their importance, % of surveyed companies

	The market is key	Only individual projects are implemented in this market	Presence
Russia	87.4 %	11.6 %	99.0 %
Near Abroad	6.8 %	42.2 %	49.0 %
Belarus	2.9 %	22.8 %	25.7 %
Ukraine	1.0 %	18.4 %	19.4 %
Kazakhstan	5.3 %	30.6 %	35.9 %
Uzbekistan	1.9 %	13.6 %	15.5 %
USA/Canada	16.0 %	15.5 %	31.5 %
Europe (without Russia and Near Abroad)	12.6 %	29.6 %	42.2 %
Great Britain	3.4 %	12.6 %	16.0 %
France	2.9 %	7.8 %	10.7 %
Italy	1.9 %	8.3 %	10.2 %
Germany and German-speaking countries	4.9 %	12.1 %	17.0 %
Northern Europe (Scandinavia and Finland)	2.9 %	9.2 %	12.1 %
Central and Eastern Europe	2.4 %	13.6 %	16.0 %

	The market is key	Only individual projects are implemented in this market	Presence
Southern and Eastern Asia	3.9 %	18.0 %	21.9 %
China	1.0 %	8.7 %	9.7 %
Japan	0.5 %	3.4 %	3.9 %
India	2.4 %	6.3 %	8.7 %
Africa	1.5 %	7.8 %	9.3 %
South and Central America	1.9 %	8.3 %	10.3 %
Brazil	1.0 %	3.9 %	4.9 %
Mexico	0.5 %	4.4 %	4.9 %
Argentina	0.5 %	2.9 %	3.4 %
Middle East	2.4 %	10.2 %	12.6 %
Australia / New Zealand	1.9 %	5.8 %	7.7 %

Grouping of markets			
Developed markets			61.2 %
New Markets			40.3 %

Presence of Russian companies in domestic and foreign markets in 2007–2020, % of surveyed companies

	2007	2013	2014	2015	2016	2017	2018	2019	2020
Russia	55 %	93 %	94 %	92 %	87 %	93 %	94 %	90 %	99 %
Near Abroad	—	—	—	—	—	—	—	44 %	49 %
Kazakhstan	—	—	—	—	—	—	—	36 %	26 %
Belarus	32 %	33 %	27 %	33 %	28 %	29 %	26 %	32 %	19 %
Ukraine	17 %	39 %	30 %	32 %	25 %	23 %	20 %	28 %	36 %

	2007	2013	2014	2015	2016	2017	2018	2019	2020
Uzbekistan	—	—	—	—	—	—	—	24 %	16 %
Other countries of the former USSR	39 %	31 %	45 %	40 %	42 %	40 %	45 %	—	—
United States and Canada	55 %	41 %	48 %	36 %	37 %	42 %	39 %	58 %	32 %
Europe (without Russia and Near Abroad)	—	—	—	—	—	—	—	51 %	42 %
Great Britain	—	—	—	—	—	—	—	28 %	16 %
Germany (German-speaking countries)	25 %	22 %	24 %	27 %	19 %	31 %	29 %	33 %	11 %
France	—	—	—	—	—	—	—	19 %	10 %
Italy	—	—	—	—	—	—	—	21 %	17 %
Scandinavia (with Finland)	28 %	17 %	17 %	18 %	16 %	20 %	21 %	22 %	12 %
Central and Eastern European countries	—	—	—	—	16 %	20 %	21 %	24 %	16 %
Other Western European countries	35 %	34 %	37 %	32 %	30 %	35 %	31 %	—	—
Southern and Eastern Asia	19 %	8 %	12 %	15 %	13 %	16 %	17 %	26 %	22 %
China	—	—	—	—	—	—	—	24 %	10 %
Japan	—	—	—	—	—	—	—	10 %	4 %
India	—	—	—	—	—	—	—	15 %	9 %
Australia	—	—	—	8 %	10 %	16 %	12 %	15 %	8 %
South and Central America	25 %	14 %	12 %	8 %	8 %	14 %	10 %	17 %	9 %
Brazil	—	—	—	—	—	—	—	10 %	10 %
Mexico	—	—	—	—	—	—	—	10 %	5 %
Argentina	—	—	—	—	—	—	—	7 %	5 %
Africa	—	—	—	9 %	7 %	10 %	8 %	17 %	3 %
Middle East	—	8 %	6 %	9 %	11 %	16 %	19 %	21 %	13 %

According to the share of the companies present in various markets, the importance of the Russian market has increased to a record level. Only 1 % of the companies surveyed did not work on it in 2020. In previous years, the share of such respondents did not fall below 6 %.

It is also interesting that 36 % of respondents implemented projects in the Ukrainian market, so it cannot be said that it is impossible to work on it due to political confrontation. At the same time, only 1 % of surveyed companies consider the Ukrainian market to be the key one, and until 2018 there were at least 5 %

of such companies (in some years even 15 % and 22 %). Such a reduction in the priority of the Ukrainian market with the remaining high percentage of companies present on it suggests that Russian companies can work in this country, but the market itself has become much less interesting, primarily due to its rapid reduction.

Software developers who have already gained a foothold in the US market are trying not to leave it. It is becoming increasingly difficult for new companies to enter it. Nevertheless, the share of companies that plan to make their debut

in the American market in the current and next year (relative to the year of the survey) from 2016 to 2019 has steadily grown, increasing over 4 years from 8 % to 13 %. The 2020 survey is not indicative, and in 2021 this indicator remained at a fairly high level – 11.6 %.

The high interest in the American market among companies that have not yet entered it is due to the fact that it is still the largest in the world. At the same time, after consolidating their positions in the United States, it is much easier for companies to enter other foreign markets.

Share of companies interested in different markets

	There is interest *	2021	2022
Near Abroad	63.1 %	9.7 %	4.4 %
Kazakhstan	48.1 %	8.3 %	3.9 %
Belarus	35.9 %	5.3 %	4.9 %
Ukraine	24.8 %	3.9 %	1.5 %
Uzbekistan	26.7 %	6.8 %	4.4 %
United States and Canada	43.2 %	6.8 %	4.9 %
Europe (without Russia and Near Abroad)	56.8 %	7.8 %	6.8 %
Great Britain	19.9 %	2.4 %	1.5 %
Germany (German-speaking countries)	26.2 %	6.3 %	2.9 %
France	14.1 %	1.9 %	1.5 %
Italy	13.6 %	1.5 %	1.9 %
Scandinavia (with Finland)	16.5 %	2.4 %	1.9 %
Central and Eastern European countries	25.2 %	4.9 %	4.4 %

	There is interest *	2021	2022
Southern and Eastern Asia	33.0 %	5.3 %	5.9 %
China	15.5 %	2.9 %	2.9 %
Japan	8.7 %	1.9 %	2.9 %
India	12.1 %	2.4 %	1.0 %
South and Central America	19.4 %	4.9 %	4.4 %
Brazil	11.2 %	2.9 %	3.4 %
Mexico	8.3 %	2.9 %	0.5 %
Argentina	7.3 %	2.4 %	1.5 %
Africa	16.0 %	2.9 %	3.9 %
Middle East	20.9 %	4.4 %	3.9 %
Australia	12.6 %	1.9 %	2.9 %

* – already present in the market or plan to enter it in 2021–2022

For the first time in 2021, 22.8 % of surveyed companies plan to enter a new foreign market, and in 2022 – 21.9 %. Relative to Far Abroad, these figures are 16.5 % in 2021 and 19.4 % in 2022.

Most often they want to make their debut in Near Abroad. From Far Abroad, the greatest interest is in the markets of the USA and Europe.

This was the case in previous years. However, the existing plans have almost never been confirmed by actions: with all intentions to more actively enter foreign markets, Russian developers have increased sales in the domestic market at a faster pace. With greater interest in the large markets of the United States and Europe, their share is still steadily declining, and the share of “New Markets” is growing slightly.

The emergence of “problematic markets” due to increased political tension

In terms of sales, the US market for Russian companies remains in the second place (after Russia) for all the years of the RUSSOFT study, but the gap from Europe is already very small (13 % for the United States and 12.4 % for Europe). Previously, the difference between them was much bigger.

It is known that among the largest Russian exporters, the share of sales in the United States in total revenue is often measured in tens of percent, and sometimes reaches 50 % and even 80 %. Service companies are the leaders in working in developed markets (the USA and the EU). They are twice as ahead of service ones in terms of the share of companies in these markets.

Nevertheless, the US market provides very significant volumes of export revenue for leading product companies. For example, Kaspersky Company, the leading Russian developer of information security solutions, earned up to \$200 million annually in the US market. In recent years, this figure has decreased (according to US media reports, in 2017 – up to about \$150 million). Over the past three years, sales in the United States

could increase (although according to the company itself, there was still no drop in sales in the US market in 2020).

Over the past 5 years, certain political risks have arisen in traditional markets for Russian developers. This applies to the countries of the European Union, the USA, Canada and Ukraine, where a campaign is being conducted in the media to create a negative image of Russia. Government agencies are not allowed to acquire Russian software in any form at all. Commercial companies are not recommended to purchase Russian software or engage Russian companies to develop software if it is used in the interests of the Ministries of Defense.

The tendency of increasing the displacement of Russian companies from the markets of Western countries (primarily the United States) has already negatively affected their sales there. At the same time, there are no reasons to expect a turning point and a change in the attitude towards Russia and Russian software companies. The number of companies, about the sanctions against which it became known from the media, is expanding.

Nevertheless, the market of the USA and other developed countries inexorably requires the presence of Russian software developers. Even US government agencies cannot quickly abandon solutions of Kaspersky Company. Phasing out Russian custom software developers from the US market can also be a difficult task given the need to maintain a budget and improve the quality of software. At the end of June 2019, it became known that the software for the crashed Boeing 737 Max aircrafts was created by Indian programmers, who were used by American contractors to develop applications. This was reported by Bloomberg, an authoritative media outlet in Western countries.

Consequently, not only the Russian side, but also the American one suffers from political aggravation. Mutual dependence in the field of IT was quite high. Nevertheless, attempts to phase out Russian companies from the markets of Western countries are not only ongoing, but also becoming more active.

“New Markets”

If we consider the geographical distribution of foreign sales, then traditional markets account for 83 % of sales of companies from Russia in 2018, and “New Markets” (Southern and Eastern Asia, Africa, South and Central America and the Middle East) – about 17 %. At the end of 2019, the share of “New Markets” increased up to 25 %, and at the end of 2020 it reached 30 %. Most likely,

the conclusions about such high sales growth rates are slightly exaggerated, but this indicator has undoubtedly grown in the last 2 years.

This ratio (70 per 30) already almost corresponds to the geographical structure of the world market. But if you focus on data of Gartner and IDC, then the United States and the EU account for

approximately 60 % of global IT spending (including communications services), and other markets – 40 %. Thus, the potential for increasing sales in emerging markets is still great. Moreover, there is an opportunity not to dwell on reaching the share of “New Markets” of 40 %. In the future, if the process of replacing American IT solutions around the world continues, these markets may account

for at least 50 % of foreign sales of Russian software companies, since these are fast-growing markets in which higher growth rates can be obtained than in stable markets in Western countries.

The growing interest in the IT markets of developing countries is also caused by the fact that the sanctions policy of the US authorities undermines confidence in American solutions and platforms in

many countries, which pushes them to find alternative suppliers.

Geographical preferences of service and product companies

Service companies are better represented (compared to product ones) in developed countries with a high level of income and with the availability of their own software products. Product companies have an advantage in Near Abroad and in “New Markets”. The same was observed in previous years. However, according to the results of the 2021 survey, interest in “New Markets” almost leveled off.

Among product companies, there are much more of those that are already working or planning to work in the next 2 years in absolutely all macro-regions (among service ones, only 1.1 %, and among product ones – 9.7 %).

10–15 years ago, service companies were generally oriented exclusively to the developed markets of the USA and Europe, since in Russia and in neighboring countries there was no solvent customer. They also did not see prospects in the “New Markets”, where the average salaries of software developers are lower than in Russian cities.

However, the situation gradually changed. Having received serious

experience working for a foreign customer, developers of custom software began to participate in large projects in the domestic market and in the CIS countries. In 2018–2019, they showed interest in the markets of Africa, the Middle East and Asia. For example, in 2017, only 2 % of service companies reported plans to enter African markets, and in 2019 there were already 7 % of them. According to the 2021 survey, this figure remained at the same level – 6.8 %.

Attitude of Russian product and service companies to work abroad (the share of surveyed companies)

	Service	Product
Work or plan to work in 2021–2022 in all markets	1.1 %	9.7 %
Did not work abroad in 2020 and do not plan	16.5 %	16.8 %
Worked only in Russia in 2020	23.1 %	27.4 %
Developed markets (presence and plans)	64.8 %	57.5 %
New Markets (presence and plans)	39.6 %	40.7 %

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**Presence of Russian product and service companies in domestic and foreign markets in 2020,
% of surveyed companies**

	Product	Service
Russia	100 %	98 %
Near Abroad	64 %	32 %
Belarus	35 %	14 %
Ukraine	27 %	11 %
Kazakhstan	51 %	18 %
Uzbekistan	22 %	8 %
USA/Canada	21 %	43 %
Europe (without Russia and Near Abroad)	32 %	54 %
Great Britain	13 %	20 %
France	12 %	10 %
Italy	12 %	9 %
Germany and German-speaking countries	12 %	24 %
Northern Europe (Scandinavia and Finland)	10 %	14 %
Central and Eastern Europe	18 %	14 %
Southern and Eastern Asia	25 %	18 %
China	12 %	7 %
Japan	5 %	2 %
India	13 %	2 %
Africa	16 %	1 %
South and Central America	16 %	3 %
Brazil	8 %	1 %
Mexico	8 %	1 %
Argentina	5 %	1 %
Middle East	17 %	8 %
Australia / New Zealand	9 %	7 %

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Geographical distribution of software development centers

Remote development centers are created by Russian companies to solve two problems: either for the reason that developers are closer to the customer and can work out with them all the emerging issues 24/24 and 7/7, or (more often) to gain access to local human resources in the labor market.

Most often, Russian companies find the necessary specialists in other cities of Russia.

In 2019, 44 % of the surveyed companies had remote development centers in

other cities of Russia, but in this case the special composition of the surveyed companies with a larger predominance of large companies in Moscow and St. Petersburg affected. And the number of respondents turned out to be insufficient. The results of the 2020 survey can only rarely reveal any trends in the distribution of remote software development centers in Russia.

Data from the 2021 survey provided the results which allow us to identify trends in a better way. So, for example, there is every reason to assume that the share

of the companies planning to open a development center in Russia or abroad will increase in the next 2 years (this also applies to Far Abroad). However, it is not yet clear how these plans will be affected by the practice of using the mode of work of a significant part of employees outside the office. In 2021, the companies surveyed plan that such a mode will account for 58 % of man-hours. In many cases, the office is still needed, but in 2021 and perhaps next year, companies will study the pros and cons of remote operation to make final decisions.

Availability of software development centers and their opening plans in the next 2 years, share of surveyed companies

	Survey 2016	Survey 2017	Survey 2018	Survey 2019	Survey 2020	Survey 2021
Have at least one remote development center in Russia or abroad	40 %	43 %	31 %	32 %	44 %	37 %
They plan to open at least one remote development center in Russia or abroad in the next 2 years	32 %	25 %	31 %	31 %	36 %	38 %
Have at least one remote development center abroad	22 %	22 %	16 %	14 %	28 %	13 %
They plan to open at least one remote development center abroad in the next 2 years	22 %	11 %	11 %	17 %	21 %	20 %
Have at least one remote development center in foreign countries	11 %	14 %	11 %	10 %	24 %	10 %
They plan to open at least one remote development center in Far Abroad in the next 2 years	15 %	9 %	10 %	14 %	18 %	17 %

In practice, plans to open new offices only characterize the desire for geographical expansion, increasing turnover and exports. Other sections of this chapter and other chapters explain that these plans most often reflect the overly optimistic attitude of respondents, and they cannot always be implemented.

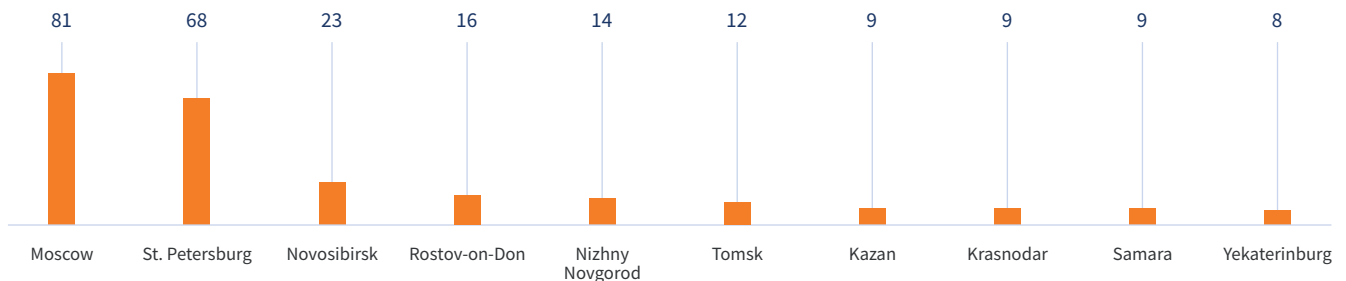
Changes in the questionnaire in 2020 made it possible to get data on which cities of Russia were most interesting for creating remote development centers in them and what the number of employees in these centers was.

In 2021, the survey presented much more cities than a year earlier, because the number of companies surveyed increased from 72 (a year earlier) to 206. As a result, it turned out that the head office or remote development center is in 66 cities of Russia, which represent 50 regions. It can be considered that the survey covered all cities and regions in which at least several dozens of software companies operate. But Vologda and Yakutsk did not get into this list, although the corresponding regions are in the top 20 of the RUSSOFT region rating in terms of software exports, because they have

one large company each, there are no many other software enterprises.

In 2021, almost three times more companies took part in the survey than a year earlier, but not very large companies provided the growth. Therefore, the total number of specialized technical personnel increased over the year not threefold, but only by 20% – up to 26,664 people. Of these, 11,396 specialists work in remote development centers in other cities of Russia.

Number of mentions of the city as the location of the head office or remote development center (Top 10)



Remote centers of surveyed companies are in 56 Russian cities. This means that in 10 cities there are only head offices.

Although the quality of the survey in 2021 was much better than a year earlier, Petersburg (again with a wide margin from all), Voronezh, Nizhny Novgorod and Saratov also occupy the first 4 positions in the number of employees in remote development centers (only Nizhny Novgorod and Saratov have changed places, but their indicators do not differ much).

**St. Petersburg
Voronezh
Nizhny Novgorod
Saratov**

the leaders in the number of employees in remote development centers

The top 15 Russian cities by the number of employees in the remote development centers of nonresident companies located in them, people

Survey 2020

1	St. Petersburg	3487
2	Voronezh	749
3	Saratov	728
4	Nizhny Novgorod	546
5	Moscow	497
6	Omsk	480
7	Ryazan	480
8	Izhevsk	297
9	Samara	297
10	Kostroma	286
11	Novosibirsk	180
12	Tver	140
13	Taganrog	85
14	Togliatti	80
15	Rostov-on-Don	79

Survey 2021

1	St. Petersburg	4318
2	Voronezh	845
3	Nizhny Novgorod	656
4	Saratov	621
5	Samara	554
6	Ryazan	521
7	Omsk	415
8	Perm	295
9	Moscow	286
10	Izhevsk	278
11	Yaroslavl	275
12	Cheboksary	240
13	Rostov-on-Don	204
14	Belgorod	143
15	Tver	138

Facts related to the geographical expansion of Russian companies in 2018–2021

The number of news that reflects the activity of Russian software companies in foreign markets is growing every year with the exception of the failure in 2018. This growth has become significant and obvious since about 2013. At the same time, interest was primarily caused by those markets that are not yet traditional for Russian software companies. This growth was expected to stop in 2020. Amidst the pandemic, marketing activity abroad is difficult, but still it did not decline as much as could be expected while maintaining restrictions on movement in the second half of 2021.

According to the results of 2021, the number of news related to expansion abroad is likely to be about the same as it was in 2019. Given that the pandemic will limit the development of international business, achieving the 2019 level is tantamount to growth.

The number of news about activity abroad, starting in 2017, has become so large that it became possible to see statistics for analyzing and identifying trends. Naturally, in 5 incomplete years, the most news was in the field of information security. Note that in this area, the conclusion of some contracts is advertised much less often than in others.

Judging by the number of news, the largest activity of Russian IT companies is observed in Southern and Eastern Asia. The second and third places are taken by Europe (without Russia and neighboring countries) and the Middle East. Given the fact that in the Middle East Russian software companies began to have actively started to work relatively recently (in Europe 20 years earlier), it can be assumed that the European market will soon be less interesting for foreign expansion than the Middle East.

Statistics on news about activity abroad in the IT sector in 2017–2021, divided by macro-regions

	2017	2018	2019	2020	2021 (6 months)	Total news for 5 years
Southern and Eastern Asia	7	4	13	8	1	28
Europe (without Russia and Near Abroad)	6	3 (-1)*	6	6	—	17
Middle East	5	2	7	3	2	17
Near Abroad	5	2	5	6	3	14
Africa	1	2	5	4	3	9
Latin America	4	1	1	2	1	8
USA	1	2	—	1	3	3
Australia	1	—	—	—	1	1
Total within a year**	22	16	31	24	15	—

* – one piece of news about leaving the market, and therefore with a minus.

** – the news may concern more than one macro-region, so it is not the sum of the top lines

**Statistics on news about activity abroad in the IT sector in 2017–2021
with separation by developers' areas of activity**

	2017	2018	2019	2020	2021 (6 months)	Total news for 5 years
Information security	6	4 (-1)*	6	5	2	22
AI, robotics	1	1	3	1	1	7
Custom software development and IT services	1	1	3	—	—	5
Enterprise management systems, billing	5	—	1	3	2	11
Biometrics and identification systems	2	1	1	1	1	6
Data storage system, backup, and data storage	2	2	—	—	1	5
Systems for public administration	—	—	2	2	—	4
Data Analysis Solutions	2	—	1	—	—	3
Cloud Management Development	1	1	—	1	—	3
Solutions for banks	—	1	—	1	—	2
Internet projects	1	—	1	—	—	2
Navigation systems	—	—	1	1	—	2
Video conferencing	—	—	1	3	—	4
Office Software	—	—	1	1	1	3
Solutions for Training	—	—	1	—	1	2
Biomedical Solutions	—	—	1	—	—	1
Solutions for Contact Centers	—	—	1	—	—	1
IoT	—	—	—	1	—	1
Platform for VAS	—	—	—	1	—	1
E-document flow	—	—	—	2	1	3
Solutions for Online Commerce	—	—	—	1	2	3
Total directions covered	9	7	14	14	9	—

* – one piece of news about leaving the market, and therefore with a minus.

Vertical Markets

Frequency of vertical markets in 2007–2019, % of all respondents

survey year/vertical markets	2007	2009	2011	2013	2015	2016	2017	2019	2020	2021
Information Technology	89 %	69 %	74 %	74 %	68 %	70 %	80 %	78 %	79 %	78 %
Banking*	35 %	36 %	23 %	26 %	34 %	29 %	20 %	38 %	53 %	39 %
Telecommunications	34 %	33 %	26 %	31 %	27 %	27 %	30 %	44 %	46 %	41 %
Industries	31 %	31 %	27 %	38 %	37 %	33 %	28 %	41 %	57 %	51 %
Hospitality, Travel & Transportation	24 %	31 %	28 %	29 %	31 %	27 %	28 %	45 %	61 %	42 %
Government	28 %	25 %	21 %	24 %	28 %	24 %	22 %	37 %	49 %	38 %
Power supply, Gas & Oil	18 %	24 %	17 %	22 %	29 %	21 %	18 %	32 %	43 %	41 %
Healthcare & Pharmaceuticals	23 %	24 %	23 %	28 %	28 %	24 %	26 %	39 %	53 %	43 %
Retail & Distribution	35 %	24 %	26 %	29 %	24 %	26 %	22 %	38 %	50 %	37 %
Education	36 %	23 %	21 %	28 %	24 %	25 %	22 %	31 %	39 %	37 %
Science & Research	—	—	18 %	26 %	20 %	20 %	26 %	31 %	35 %	25 %
Gaming & Entertainment	20 %	11 %	9 %	15 %	17 %	15 %	16 %	22 %	14 %	11 %
Media	—	—	13 %	18 %	18 %	13 %	14 %	18 %	21 %	18 %
Sport & Travel	—	—	10 %	17 %	11 %	15 %	16 %	23 %	29 %	19 %
Insurance	—	—	13 %	15 %	15 %	13 %	11 %	21 %	25 %	24 %
Building & Real estate	—	—	12 %	17 %	28 %	17 %	16 %	33 %	36 %	33 %
Services	—	—	27 %	35 %	26 %	22 %	28 %	42 %	44 %	36 %
Finances	—	—	25 %	26 %	21 %	19 %	19 %	33 %	47 %	33 %
Energy	—	—	17 %	21 %	24 %	22 %	21 %	31 %	42 %	35 %

* – until 2011: Banking & Financial Services

During all the time of the NP RUSOFT research, no regularity was revealed in changing the significance of certain vertical markets for Russian software companies. Fluctuations in this indicator are random or temporary. In general, it can be concluded that the sectoral priorities of Russian exporting companies do not fundamentally change during the decade.

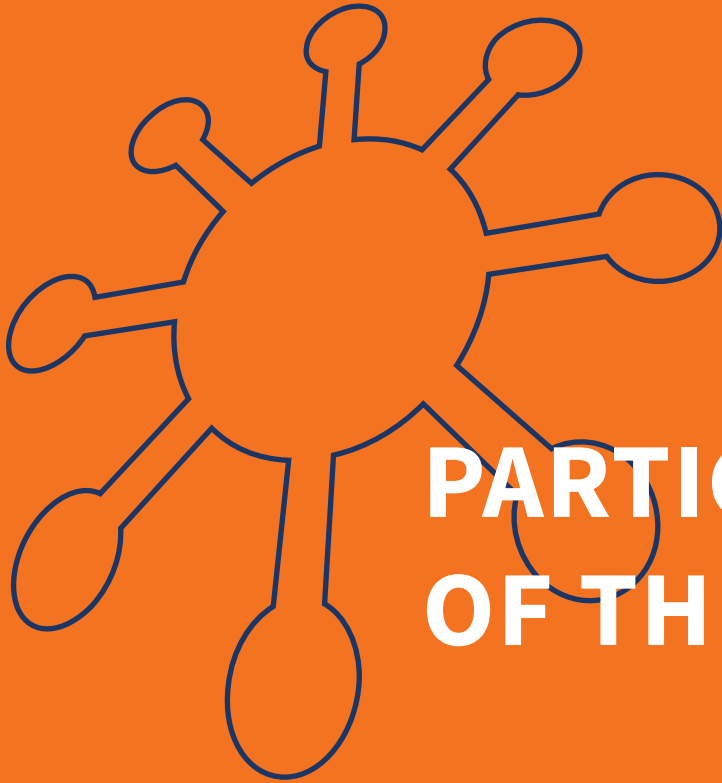
The only clearly identified pattern associated with vertical markets was due to a sharp reduction in the number of their mentions per company in crisis times. In 2009–2010, software developers had to focus on the areas in which they were most competitive or which were less

vulnerable to the global crisis. A similar decrease in this indicator was revealed in a survey of 2015–2016.

In 2018, there was no corresponding question in the questionnaire. It reappeared in 2019 and made it possible to see a sharp increase in the average number of these vertical markets: it reached 6.8, and in 2016–2017 this indicator was 4.6. All vertical markets with the exception of “Information Technology” are mentioned by a large number of surveyed companies.

In 2020, the growth of this indicator continued (an increase to 8.2), but this is primarily due to the special composition

of the companies surveyed (there was a much smaller share of small companies than in previous years). Nevertheless, data from the survey of 2021 allow us to conclude that since 2019 (possibly since 2018, when there was no corresponding question in the questionnaire) there has been an increase in the digitalization process in almost all sectors of the Russian economy, and demand in vertical markets has grown. In the last three years, the mention frequency indicator of each vertical market has also fluctuated, as in previous years, but already at a higher level. The average number of these vertical markets in the survey in 2021 was 6.8, as in 2019.



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



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