# POSITIONS OF RUSSIAN SOFTWARE COMPANIES IN THE GLOBAL IT MARKET

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A year ago, we faced a significant increase in demand for IT services, primarily from customers from industry, fintech, retail and other fields. It resulted in revenue growth of almost 40%. The IT market has grown by 20% according to TAdviser.

However, in 2022 the needs of the market have changed. As many foreign software and hardware vendors have curtailed operations in Russia, businesses face the need to adapt quickly, and replace familiar products and services with alternative solutions. Now the domestic IT market is undergoing a transformation; new interaction chains and ways of working are being built. In current circumstances, the value of IT companies with vast expertise, practical experience and the ability to help clients develop import-substituting technologies is increasing. The current realities require flexibility and high speed of implementation of products and solutions.

Local companies have already experienced situations of rapid change. Thus, the global crisis of 2008 similarly slowed down the development of the IT industry. But, having survived it, businesses have become more responsible in developing IT systems in order to increase the productivity of processes and reduce possible risks. For several years, Russian companies have been systematically moving its processes beyond the limits of vendor automation systems and developing its own IT solutions. Many years of practice have taught businesses to act strategically, calculate risks in advance, localize services and systems within a company, on their own servers, in order to be able to manage processes and not to depend on external solutions.

The pandemic has shown that companies with high levels of digital maturity are more resilient in a changing environment and capable of rapid restructuring. In 2022, the trend towards conscious transformation and IT strategy planning continues. Attempts to increase profit margins by automating and robotizing business processes have given a new surge of interest in artificial intelligence technologies, including machine learning and big data analysis. Such solutions are in demand in almost all industries, and their popularity will increase in future.

Work on global markets also runs its course, since new unique software is always in demand regardless of location. We continue to cooperate with partners in the USA, the UK, Germany, Belgium, Cyprus and other countries. Like other companies, we open branch offices abroad, including the CIS countries. We are also actively building connections with partners in the Middle East and Latin America. We work with different clients from various industries and countries, and we are sure that now we need to expand our horizons in order to diversify our business.

# 1.1. Russian ICT market

RUSSOFT does not conduct its own research on the Russian IT market. Analysts of the Association conclusions about the condition of this market only based on the analysis of data obtained from numerous open sources (reports of research companies, published ratings, official data of indicators of the largest Russian IT companies).

Based on its own research, RUSSOFT can only assess the correctness of the measurement of the software segment of the IT market, since it has information on the sales of Russian software developers on the domestic market.

According to IDC the Russian IT market has reached USD 25 bln in 2019 (1.609 tln, which is 7 % more than in 2018). Most segments have grown by more than 10 %.

The performance of sales of IT equipment ("hardware") has appeared to be worse.

At one of the presentations of data made in 2022 IDC managers reported that they have faced difficulties related to obtaining full information in Russia required to correctly measure the entire IT market. RUSSOFT analysts have earlier noted a mismatch of IDC data with the data of other research companies, as well as with RUSSOFT data (sales of Russian software companies in the domestic market were much higher than the whole market size according to IDC).

For this reason, starting with the summary of 2019, a general idea of the whole market and its largest segments (first and foremost, of the "Software Market") was perceived by RUSSOFT based on the analysis of data obtained from various sources of information. In addition to partially disclosed IDC data, the results of studies of individual segments performed by other research companies, official Russian statistics, the reports on the results of the year of the largest companies (turnover data of distributors and system integrators are of principal interest) are also available. In addition, RUSSOFT has its own data on the sales of Russian software companies in the domestic market.

Comparison of the data of analysts, large distributors and the largest companies with own RUSSOFT sales estimates of domestic companies allows to suggest that the entire IT market in Russia has increased in 2019 not by 3.9 %, but by 7–8 %, and its volume is at least USD 29 bln.

**Russian IT market in 2013–2020 according to IDC**

| | | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 |
|---|---|---|---|---|---|---|---|---|---|---|
| Viewpoint of foreign companies | in USD (growth/ reduction over a year) | 33 bln (-1 %) | 28 bln (-16 %) | 17.8 bln (-39 %) | ≈17 bln (-3-4 %) | 21.8 bln (+17 %) | ≈24 bln (+9.5 %) | 24.86 bln (+3.9 %) | 25.35 bln (+2.0 %) | 32.6 bln (+21 %*) |
| Viewpoint of Russian companies | in RUB (growth/ reduction over a year) | 1.05 tln (+3.9 %) | 1.063 tln (+1.2 %) | 1.08 tln (+1.6 %) | 1.137 tln (+5.3 %) | 1.27 tln (+2 %) | 1.51 tln (+18.7 %) | 1.61 tln (+7 %) | 1.83 tln (+14.0 %) | 2.40 tln (+23.5 %) |
| | Variance in RUB adjusted for inflation | -2.4 % | -9.1 % | -9 % | ≈0 % | ≈0 % | +13.8 % | +4 % | +8.7 % | +13.9 % |

* — the growth indicator does not correspond to the data of the previous year, as IDC has probably recalculated the results of 2020.

The question of what is the state of the Russian IT market in 2020 is even more complicated. It is only safe to say that in RUB terms this market has increased by at least 14 %, and in USD terms — by at least 2 %. However, there are grounds to believe that the increase was a few more percentage points higher.

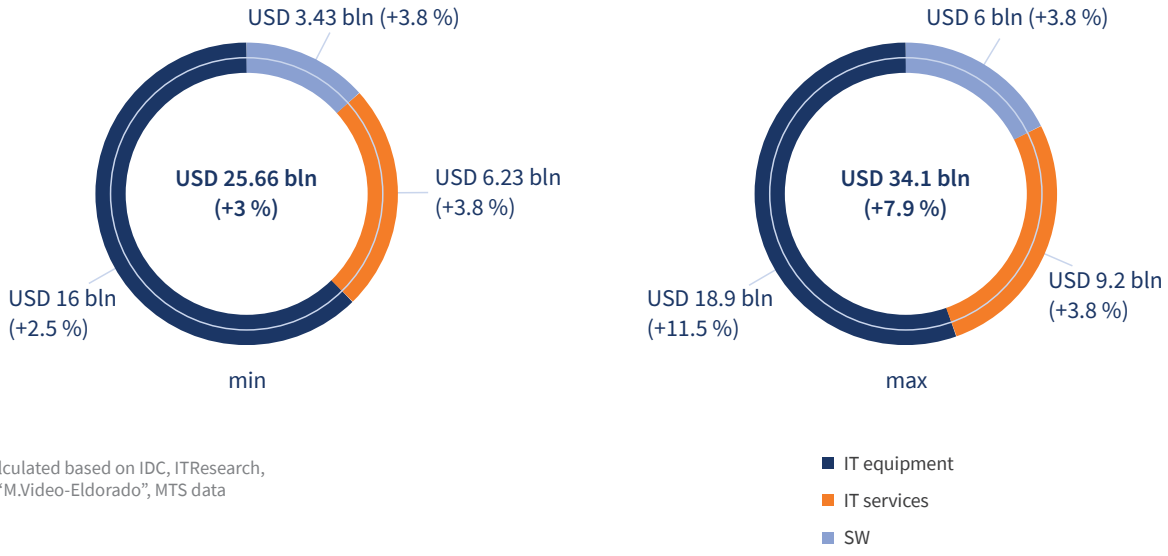
The growth of 14 % in RUB and 2 % in USD in April 2021 was reported by IDC when summing up the preliminary results of the year. With such an increase the Russian IT market has reached RUB 1.83 tln in 2020 (IDC has for the first time presented this indicator in RUB terms) or USD 25.35 bln.

The analysis of the information obtained from different sources allowed to designate a certain range of the size of the Russian IT market, as well as its growth (with the same segmentation that IDC has made in the previous years).

If we focus on the minimum indicators, the market volume based on the results of 2020 was USD 25.66 bln and showed an increase of 3 % (15 % in RUB). These results are somehow very close to the preliminary results presented by IDC.

If we focus on the maximum indicators, we get the size of the IT market of USD 34.1 bln showing an increase of 7.9 % over the year (RUB 2.46 tln with an increase of 20.6 %).

**RUSSOFT estimation of the size of the Russian IT market and of its individual segments based on the results of 2020**




Source: Calculated based on IDC, ITResearch, RUSSOFT, "M.Video-Eldorado", MTS data

There is reason to believe that the minimum indicators reflect the existing underestimation both in absolute values and in terms of growth, while the maximum market size with the corresponding growth is quite consistent with the real state of affairs. This conclusion is based on some important indicators that highly characterize the situation in the Russian IT market.

In particular, the total revenue of the 100 largest Russian IT companies listed in the CNews rating forms such an indicator. It exceeded RUB 2 tln (almost USD 28 bln), showing an increase of 28.6 % over the year (15.1 % growth in USD).

The version on the market volume underestimation is also confirmed by the data on the expenditures of organizations associated with information technologies indicated in the Rosstat directory "Russia in Figures 2021": by the end of 2019 such expenditures exceeded RUB 1.6 tln (USD 25 bln). Most likely, the expenditures of only large and medium-sized enterprises, which are obligated to report to the statistical department are reflected in the directory. These RUB 1.6 tln most certainly do not include the costs of purchases of computers, smartphones, printers and software made by private individuals. With account for the growth in 2020 and for the costs of small businesses and households, the total IT-related expenditures in Russia may well be at least USD 34 bln.

Underestimation of the Russian software market by IDC is especially clearly visible. According to IDC calculations, the volume of this market has amounted to approximately USD 3.5 bln, while according to RUSSOFT sales of software products of Russian software companies has exceeded USD 4 bln and imports,

according to the Central Bank of the Russian Federation, have amounted to USD 4.5 bln.

However, IDC figures cannot be considered incorrect. We can talk about various approaches and methods.

The growth indicators of the Russian IT market based on the results of 2021, presented by IDC, look quite realistic. For these reasons absolute values are easier to count, regardless of which version is considered.

According to IDC, the volume of the entire IT market reached USD 32.6 bln showing an increase of 21 % (in RUB this increase was 23.5 % to RUB 2.40 tln). Thus, the market volume has recovered to the level of 2013. With no account for mobile phones and equipment of telecom operators the size of the IT market is USD 21.7 bln with an increase of 16 %.

According to RUSSOFT, the market volume has reached USD 41.3 bln (RUB 3.04 tln), and its growth continued through the past decade with a slight delay in 2015. IDC data show no doubt about the growth of the market, since the available information confirms the increase by approximately 20 % in 2021.

According to Rosstat data Russian organizations have spent RUB 3.72 tln (USD 50.5 bln) in 2021 on the introduction and use of digital technologies, which is 26 % more than in 2020. About 70 % of this amount are accounted for imports of goods and services (in 2019 — 64 %, in 2020 — 67 %). The amount of these costs shall not consist with the size of the IT market according to IDC, since different techniques are used. However, the growth of these two indicators shall not differ much (in fact, it does not differ). The same applies to the total amount of revenues of companies listed in the Tadviser rating of the 100 largest IT companies in Russia in 2021, which amount has increased by 18 %. According to Tadviser, the entire IT market has grown by 20 % to USD 30.1 bln (RUB 2.22 tln).

**Dual Currency Index of RUSSOFT**

IDC and other foreign analytic companies tend to measure the Russian market in US dollars, although the national currency in Russia is rubles. The use of both US dollars and rubles can be quite justified. Much depends on which market segments are studied and which tasks are set during the study. If we focus on the interests of foreign corporations, which measure their income in US dollars or euros, then the use of the American or European currency will naturally be justified. The US dollar, as the world's reserve currency, has an advantage over the euro.

If we focus on Russian developers and IT consumers, then the importance of taking measurements in rubles is increasing.

In order not to get confused with various growth indicators (in US dollars and in rubles), RUSSOFT proposes to focus on its own dual-currency index. It involves measuring the sales of the solutions produced in Russia in rubles, and measuring the volume of imports of software, electronic devices and IT systems in dollars (with account for their share in the total volume of the Russian IT market).

According to the dual-currency index, the Russian market has grown by 5 % in 2019. At the same time, the calculations are based only on IDC data, which RUSSOFT considers rather underestimated. If we focus on the dual-currency index, it turns out that a slowdown in growth has occurred in 2019, since in 2018 this index has corresponded to an increase of 10 %, and in 2017 — by 9 %. However, with account for the fact that, according to RUSSOFT estimates, the growth indicators of IT services and software markets should be higher than that specified by IDC, it can be argued that all the last three years the development of the IT market has been the same. The growth rate was quite decent, but also not very high.

At the end of 2020, the dual-currency index amounted to 1.134, which corresponds to an increase of 13.4 %. The growth of this indicator resulted in a high demand for the computer equipment, which arose largely due to the pandemic and the associated transition to remote operation, training, trade and entertainment.

Since in 2021 the ruble exchange rate against the US dollar almost did not change, the dual-currency index differs slightly from the indicator of the IT market growth. It amounted to 1.208 (corresponding to an increase of 20.8 %).

Obviously, this index will not be easy to calculate by the end of 2022, since, most likely, not only the average annual dollar exchange rate will change significantly, but also the structure of the IT market will become different. It is possible that there will be not enough data available to accurately determine both the size of the market and its structure.

## 1.1.1. Structure of the Russian IT market

The Russian IT market was considered immature due to the too high share of equipment sold in this market. In part, if the specified maturity criterion is applied, this market still remains immature. However, after many years of slow growth in the share of IT services and software, in 2014–2015 there was a sharp jump in the sales of IT services — their share increased from 20 % to 25 %. In 2016, the share of services almost did not change, and by the end of 2017 it increased by one percentage point — to 26 %. This change in 2014–2015 was primarily caused by a significant increase in the cost of imported equipment (as a result of the devaluation of the ruble due to the crisis in Ukraine) with a very small number of Russian analogues, which led to a decrease in the sales of equipment. However, in 2017, the ruble devaluation factor could no longer contribute to the increase of the share of IT services, since significant strengthening of the ruble has happened that year.

In 2018, IDC has indicated a significant increase in sales of IT equipment in Russia (by 15 % in US dollar terms), but sales of IT services and software have not changed much. Consequently, there was some retreat and a return to the former structure existing before 2014, although the share of IT services (24 %) still remained higher than it was in 2014 (20 %). In 2019, the market structure did not change significantly, but the share of IT services and software has increased slightly.

At the end of 2020, RUSSOFT has conducted its own assessment of the Russian IT market, according to which the share of IT services and software turned out to be higher than those estimated based on IDC calculations. At the same time, according to RUSSOFT the share of IT equipment has increased slightly over the year, while according to IDC calculations this share, perhaps, has even decreased slightly. This is due to the fact that according to preliminary data presented in April 2021, the growth of the software market was slightly larger than the growth of the entire IT market, while the growth of the IT services market (there are final results for it) remained at about the same level.

**Structure of the Russian IT market in 2019**

| | share (a year earlier) | change (absolute value) |
|---|---|---|
| IT equipment | 62.6 % (63 %) | +3 % |
| IT services | 24.1 % (24 %) | +5.5 % |
| SW | 13.3 % (13 %) | +6 % |
| Total: | 100 % | +3.9 % |

Source: Calculated by RUSSOFT based on IDC data

**Structure of the Russian IT market in 2020**

| | share | change (absolute value) |
|---|---|---|
| IT equipment | 55.4 % | +11.5 % |
| IT services | 27.0 % | +3.8 % |
| SW | 17.6 % | +3.8 % |
| Total: | 100 % | +7.9 % |

Source: RUSSOFT assessment

In 2021, hardware sales showed a much bigger growth in comparison to the growth of software and IT services sales. Consequently, the share of equipment in the total market has also increased. However, since 2022, the idea of the market structure evolution has become irrelevant. Only such a structure will be correct one that will allow Russian society and the Russian economy to withstand the pressure of unprecedented sanctions.

**Structure of the Russian IT market in 2021**

| | share (a year earlier) | change (absolute value) |
|---|---|---|
| IT equipment | 66.2 % | +27.9 % |
| IT services | 21.4 % | +7.5 % |
| SW | 12.4 % | +13 % |
| Total: | 100 % | +21 % |

Source: Calculated by RUSSOFT based on IDC data

## 1.1.2. Russian Software Market

In 2020, the growth of the Russian software market, according to IDC, amounted to 16 % — from RUB 213.5 bln to RUB 247.6 bln. Conversion into dollars at the IDC rate (RUB 64.69 for 2019 and RUB 72.32 for 2020) shows an increase from USD 3.3 bln to USD 3.42 bln (by 3.8 %).

The growth indicator looks quite realistic (sales of Russian software companies in the domestic market also increased by about 16 % in ruble terms), but the absolute value seems to be underestimated. It can be assumed that the IDC method does not cover all types of software sold in Russia.

According to the methodology used by RUSSOFT, sales of Russian software companies on the domestic market traditionally turn out to be much higher than the capacity of the entire market. At the end of 2020, domestic sales of Russian software companies amounted to USD 9.5 bln, with an increase of 4.5 % (this increase in rubles was 16.5 %).

However, this figure includes revenues from the sales of custom software, which IDC classifies as IT services.

Nevertheless, sales of domestic software products within Russia amounted to approximately USD 4.5 bln with an increase of 1 %, which turns out to be the largest software market determined by IDC. This phenomenon is partly due to the fact that a double count is factored by RUSSOFT in this indicator, since when creating a solution on the platform of a certain vendor, the cost of software of this vendor is considered twice — in the revenues of the developer of the final solution and in the revenues of the platform provider. However, this double count is unlikely to exceed USD 0.5 bln (most likely much less).

Assuming that foreign software developers sell at least USD 2 bln in Russia, it turns out that the entire Russian software market in 2020 has reached USD 6 bln.

Foreign software may account for much more than USD 2 bln, because the import of computer services, according to the Central Bank of the Russian Federation, amounted to USD 4.5 bln in 2020 with an increase of 25 % compared to 2019 (with estimated USD 3.59 bln import at yearend 2019). This import also includes custom software (some foreign vendors develop custom systems based on their platforms, and some Russian companies order software development abroad), but the supplies of relevant services from foreign companies is not large-scale (these supplies are unlikely to exceed USD 1 bln).

Thus, if we summarize the sales of software products and the sales of software development services in the Russian market, by the end of 2020 these will amount to not less than USD 10.4 bln.

Such a large difference in indicators (of IDC and RUSSOFT) can be easily explained by the use of different

approaches and methods. The methods, goals and objectives of research of certain markets can vary dramatically. Indeed, there may be many options of the ways of the software market measurements. This explains the presence of serious discrepancies in the results of the studies. Shall be custom software included in the software market or not? Shall SaaS be classified as IT services or as software? Shall the revenues of software companies from the implementation and support of software be accounted for or not? Shall custom development made by a company for a specific customer on its own replicated platform be considered as a service or as a typical solution? Shall multiple sales of a software and hardware complex developed by a software company based on its standard software be considered as the sales of hardware or the sales of software? There are many such questions. In most cases, methodological difficulties are related to the lack of understanding whether a certain segment is related to the IT services market or to the software market.

It was indicated in Rosstat "Russia in Figures 2021" directory that in 2019 the expenditures of organizations associated the purchases of software (this figure is calculated with a delay of more than a year) amounted to RUB 488 bln (USD 7.5 bln). It is possible that the indicator is even underestimated, since it is obtained on the basis of statistics reporting. It includes custom software, but with no account for this software, the entire corporate software market shall be about RUB 260 bln (USD 4 bln). According to most conservative estimates, in 2020 this figure has exceeded RUB 290 bln (in dollars it is definitely above USD 4 bln).

Since in previous years the Russian software market was measured in US dollars, to reflect the dynamics for 2020 it is again measured in US currency, but with duplication in rubles.

## Main characteristics of the Russian software market in 2015–2021

| | | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | Notes |
|---|---|---|---|---|---|---|---|---|
| Market size (change over the year) | USD | USD 2.2 bln (-4 %) | USD 3 bln (+19 % *) | USD 3.07 bln (+2.2 %) | USD 3.3 bln (+6 %) | USD 3.42 bln (+3.8 %) | USD 4.04 bln (+13 %*) | IDC version |
| | RUB | — | — | — | RUB 213 bln (+8.7 %) | RUB 247 bln (+16 %) | RUB 298 bln (+15.4 %) | |
| | USD | USD 6–7 bln (+11–12 %) | USD 7.3–8.5 bln (+20–22 %) | USD 8–9.3 bln (+10–11 %) | not less than USD 10 bln (≈ +10 %) | not less than USD 10.4 bln (+3.8 %) | USD 12.06 bln (+16 %) | RUSSOFT version (including custom software, SaaS and implementation services), USD |
| | RUB | — | — | — | RUB 646 bln | RUB 750 bln (+16 %) | RUB 889 bln (+18.5 %) | |
| Change in rubles, with the adjustment for the official inflation rate | | +16–17 % | +3.5 % | +5.5 % | +7 % | +10.6 % | +9.4 % | |

* — indicated IDC growth seems to have been obtained after the adjustment of the data for the previous year

According to IDC in 2021 the Russian software market has increased by 13 % in dollar terms to USD 4.04 bln and by 15.4 % in ruble terms (up to RUB 298 bln). RUSSOFT analysts do not bring these data into question. Obviously, these data do not cover all segments of the Russian software market (in accordance with the IDC methodology).

RUSSOFT considers the software market with the inclusion of the sales of custom development services, having fairly accurate data on the sales of Russian software companies in the domestic market. With account for the fact that sales of foreign companies have amounted to at least USD 2 bln in

2021, the total market size, according to RUSSOFT, has reached USD 12.06 bln with an increase of 16 % over the year (in rubles the increase amounted to 18.5 % to RUB 889 bln).

It is easy to make the general forecast for 2022. It is obvious that the sales of foreign companies will decrease sharply (perhaps by more than 2–3 times). At the same time, the sales of Russian companies will increase significantly (in spring 2022 a multiple increase was registered with some of them), since it shall be required to replace the solutions of the companies that have terminated their operations in Russia. In addition, the cost of some popular Russian software products has increased by 10–20 %. For this reason the growth of the Russian software market in 2022 is still likely to continue, although it is unlikely to be significant.

We can expect a particularly large increase in the office software market due to the massive replacement of solutions, primarily those of Microsoft. According to J'son & Partners Consulting, the growth of this market in 2021 was only 9.3 % — from RUB 38.85 bln to RUB 42.5 bln. The growth is not very large, because at the end of 2021 the saturation of the market was quite high and it was assumed that its further growth will be smooth.

According to analysts at J'son & Partners Consulting, changes in state regulation and the development of market players will result in radical changes in the market structure to be introduced in the coming 3–5 years, including a sharp increase in the share of Russian office software. A smoother trend was expected earlier in the increase of the share of Russian office software (from 7 % in 2020 to 40 % in 2026) and open source software (from 15 % to 30 %), and also in the decrease of the share of foreign software (from 78 % to 30 %) and a more uniform distribution of the market between different types of players. According to the results of a study conducted after the start of a special military operation in Ukraine, on the condition that the observed trends will remain, we can expect that by the end of 2027 a large market share will be taken by Russian office software platforms (forecast — up to 82 %), while the share of open source solutions will remain 10 %, and foreign ones — 8 %.

According to the estimates of J'son & Partners Consulting, the share of foreign software products (Microsoft Office, Hancock Office, WPS Office, etc.) in the office software market in 2020 was 77.5 %, with 15.5 % share of the free software (LibreOffice and OpenOffice) and 7 % share of the Russian software ("MyOffice" developed by "New Cloud technologies", P7-Office and P7 solutions).

### Russian office software market based on the results of 2020–2021


Source: J'son & Partners Consulting

## 1.1.3. Use of Internet Technologies

According to the Russian Electronic Communications Association (RAEC), the growth of the Runet economy has continued in 2020. The coronavirus pandemic not only did not impede this growth, but partly even has contributed to it (restrictive measures have positively influenced some segments of the Runet economy and have negatively influenced other segments). The volume of the e-commerce segment amounted to RUB 6.07 tln (+22 %). The Runet audience reached 97.4 million people, the mobile Internet audience — 89.5 million people. In general, the Runet economy in 2020 grew by 22 % to RUB 6.7 tln.

In 2021 the Russian economy as a whole began to recover and the negative impact of the pandemic came to naught. At the same time, its positive impact on e-commerce has persisted. As a result, the growth of the Runet economy amounted to 42 % (up to RUB 9.5 tln). Such a significant increase was provided primarily by online retail (it reached RUB 2.992 tln with an increase of 52 % over the year) and electronic payment services (RUB 2.547 tln, +42 %). At the same time, the volume of Internet sales of tourist services grew by only 5 % and amounted to RUB 352.3 bln, sales of services via the Internet increased by 28 % to RUB 1.26 tln. The marketing and advertising segment reached RUB 432.5 bln with an increase of 24 %.

The Runet audience has hardly increased over the year. It increased from 97.4 million people (79.5 % of the country's population) up to 97.5 million people (79.9 %). At the same time, 94 million people used Internet every day. The audience of mobile Internet has also slightly increased — from 89.5 million people (73.1 % of the population) up to 90.2 million people. (73.8 %).

According to analysts at the SlickJump advertising platform, in 2021 the share of mobile traffic in Runet increased by 2 %, and in total, portable devices accounted for 83 % of all traffic last year. In March, this figure was 87 %, which is still the highest figure for Runet during the entire records period.

According to the Federal State Statistics Service (Rosstat), in 2020, online sales accounted for 3.9 % of retail sales in the Russian Federation against 2 % in 2019. At the end of 2021, this figure has reached 5.1 %. Thus, the share of e-commerce in two years has increased 2.5 times, which was largely facilitated by the COVID-19 coronavirus pandemic — people started to spend more time at home due to pandemic restrictions and to order goods on the Web.

**The rules of international business are changing and are likely to crystallize in about three years. The world is shifting from being a global market towards regionalization – territorial associations of countries strengthened by economic relationships. Technological sovereignty will begin within "friendly" agglomerations, entire niches and markets will open up for Russian software. We are interested in the markets of the Middle East, Africa, South America, certain countries in Southeast Asia, however, regional competition with India and China will be high.**

**Igor Kalganov**
CEO of Group T1

T1

## 1.1.4. Telecommunications Market

### The volume of the telecommunications market in Russia in 2020

| Absolute value | Growth/ decline in 2021 | Growth/ decline in 2020 | Growth/ decline in 2019 | Source |
|---|---|---|---|---|
| RUB 1.8 tln (USD 24.42 bln) | +3.2 % (+1.8 %) | -0.7 % (-10.5 %) | +2.1 % (-0.4 %) | TMT Consulting |

At the end of 2021 the volume of the Russian telecommunications services market, according to TMT Consulting, grew by a record 3.2 %. In the previous few years, this market either showed slight contraction or small growth (for example, the 2.1 % increase in 2019 was mainly due to tariffs revisions, and there was a 0.7 % reduction in 2020).

According to TMT Consulting, the number of subscribers (active SIM cards) of mobile communications in Russia increased in 2021 by 3.3 % to 259 million, approaching the level of 2019 (260 million). Penetration was 178 %. In absolute terms, the subscriber base grew by 8 million — this is the highest figure in the last 5 years. This growth was facilitated by the relief of "stay-at-home" restrictions, which ensured the influx of visitors to telecom stores, as well as the partial restoration of the number of labor migrants, which traditionally form a noticeable share of customers of Russian operators.

Mobile revenues in 2021 increased by 4.4 % compared to 0.9 % in the previous year. In addition to the growth of the subscriber base, this was facilitated by an increase in roaming revenues due to an increase in outbound tourism. A significant increase in revenues from additional services in the B2B segment formed another growth factor.

According to TMT Consulting, broadband Internet penetration in 2021 was 61 %. The subscriber base grew by 0.8 %, and revenues grew by 3.0 %. The B2B segment had a significant impact on the growth of the broadband Internet access market in 2021 due to the connection of the third stage of socially significant facilities. An additional positive factor was the recovery of the "small and medium entrepreneurship" sector from the negative consequences of "stay-at-home" restrictions introduced in 2020.

Tariffs revision also had an impact, though a slight one, on the market growth. For example, the cost of wired Internet has increased (an increase was up to 15 %).

A more significant impact on the change in the cost of services and on the volume of the entire telecommunications market may appear at the end of 2022. For example, at the beginning of the year mobile operators have raised tariffs by about a 10 %.

According to Svyaznoy, the volume of the Russian smartphones market in 2021 amounted to 29.4 million units, showing a decrease by 7 % compared to 2020. Sales of these devices in the country have dropped for the first time since 2017. In monetary terms, the smartphone market in Russia in 2021 reached RUB 751.1 bln, which is 28 % higher than the result of a previous year. Analysts rationalize the increase in revenues with a decrease in quantitative supplies by an increase in the average price of the gadget for the year by 38 %, to 25.5 thousand rubles. The decline of the Russian market in physical terms is related to its oversaturation. Most people who wanted to buy new smartphones did this in 2020. In addition, people started to use one phone model for a longer period of time, for which reason they buy more expensive versions.

# 1.2. Russia and Russian Cities in the World IT Ratings

The study of the way in which Russia as a whole and Russian cities and companies are represented in various ratings, in analysts' reports and in foreign English-language media, is no longer very relevant after the start of a special military operation in Ukraine. Until the beginning of 2022, there was some bias among the drafters of ratings, foreign analysts and journalists, who were still noting some Russian achievements, which to a greater or lesser degree has fostered the promotion of the solutions of Russian high-tech companies or the development of the infrastructure in Russia.

After the start of a special military operation, one cannot count on any partial objectiveness in the representation of Russia abroad. For this reason most of the achievements that were reflected by the drafters of ratings and by foreign analysts in previous years can only be recollected. At the same time, some analysts continued to study Russia after the start of a special military operation.

There were no significant changes in the position of Russia in world ratings in recent years. It is worth noting the continued rise in the Doing Business rating in 2020, which can be considered the most important among all world ratings. However, in 2020 in most cases a slight slide to somehow lower positions was observed, and in 2021 a slight increase was more often recorded. Apparently, the general negative information background regarding the state of affairs in Russia produces its adverse effect, and this affects the drafters of ratings.

At the same time, any change in Russia's position in world ratings bears a tenuous relation with real changes. Long-term observations allow to determine the following pattern: the position of Russia in the rating is the higher, the less subjective expert assessments are taken into account during rating drafting. For this reason the reduction or the increase in the rating of Russia primarily reflects the way Russia is treated abroad. This is also important, but it is not worth judging by the positions in the ratings about the real situation in a particular area of activity in the country.

At the request of the Ministry for Digital Technology, Communication and Mass Media of the Russian Federation RUSSOFT has conducted in March 2020 interviews of the members of the Association to gain an understanding of the way the position of Russia in the world ratings affects their business (promotion of software products and custom software development services abroad). No examples have been identified that such an influence exists. Most often, respondents answered categorically — they never encountered the fact that positions of Russia in different ratings has exerted any positive or negative influence during contracts conclusion.

Only ratings and analyst reports on specific companies or their products can be relevant for companies (in particular, Gartner and IDC, Forrester Research reports and the rating compiled by the Association of Outsourcing Professionals). There are a lot of companies in the world market whose affiliation with a particular country is difficult to determine. This is why most often the consumer focuses on the brand. In most cases, the country of origin of the company is of absolutely no interest for customers, unless it is about state purchase contracts. In these cases, over the past 7 years (since the events in Ukraine), the geopolitical aspect has influenced the decision to purchase Russian software.

According to the answers of respondents, the following conclusion could be drawn (it is available in the answer of one of the respondents): "We should welcome Russia's progress in these ratings, but only due to the real development in the relevant areas. It is necessary to monitor these ratings, but at the same time we should account for their conventionality, and should not lock ourselves into on them".

However, it is not just about the events in Ukraine and the attitude towards Russia. In 2022 many ratings have lost their relevance since no fairness is any longer possible at these ratings compilation. For example, how can business conditions in the US and the EU be positively assessed if unprecedented political pressure is exerted on companies? At the same time, not only foreign companies (Chinese, Russian) operating in the markets of America and Europe, but also local companies start to be under the pressure of politicians. The situation is aggravated by the fact, that the scope of what is allowed has become incomprehensible. The drafters of ratings, apparently, do not risk to objectively evaluate the conditions for doing business in Western countries, for fear of political and economic pressure. If you adapt to Western politicians, then there will be no confidence in the ratings being compiled — their existence loses any meaning.

Perhaps for this reason, the World Bank has stopped publishing the Doing Business index. This decision became known in September 2022. The representatives of the bank explained it by the fact that errors were spotted in the preparation of previous studies. It is possible that the objectiveness of the drafters of the Doing Business index, who have ranked Russia and China too high, was recognized as a mistake (ranking 28 and 31, respectively, in 2020).

New versions have not appeared in many other well-known ratings of countries. Consequently, the drafters of ratings, too, probably could not find a compromise between the objectiveness and the pressure exerted by politicians.

### Changes in the position of Russia in the ratings of countries with respect to their competitiveness, innovation and the use of ICT

| No. | Rating name | Year/place of Russia in the rating (↑ or ↓ relative to the previous version) | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 |
| Competitiveness and Business Conditions | | | | | | | | | |
| 1. | Doing Business | 62 (↑) | 51 | 40 | 35 | 31 | 28 | — | — |
| 2. | The IMD World Competitiveness Yearbook | 45 (↑) | 44 | 46 | 45 | 45 | 50 | 45 | — |
| 3. | The best developers (ranked by average score across all HackerRank Challenges) | — | — | 2 | — | — | — | — | — |
| Innovation and Use of ICT | | | | | | | | | |
| 4. | Bloomberg Innovation Index | 14 (↑) | 12 | 26 | 25 | 27 | 26 | 24 | — |
| 5. | Global Innovation Index | 48 (↑) | 43 | 45 | 46 | 46 | 47 | — | 47 |
| 6. | E-Government Development Index | — | 35 (↓8) | — | 32 | — | 36 | — | — |
| 7. | UN Global Cybersecurity Index (GCI) | — | — | 10 | — | 26 | — | 5 | — |

## Positions of Russia in Several Other Ratings

In 2021 Russia ranked 10th in the rating of countries with the most stable segments of the national Internet (according to Qrator Labs, the specialist company in network security), rising by 3 positions over the year. At the same time, the maximum percentage of possible networks failures in the Russian Federation increased from 5.08 % to 5.15 %. This means that a larger number of networks in the Russian Federation will lose availability when a national telecom operator fails.

According to the Swiss business school IMD, in 2021 Russia rose one position in the ranking of digital competitiveness of countries, taking the 42nd place in this rating. The same school compiles ratings of countries' competitiveness (not only in the digital sphere). Russia ranks 45th in this rating.

At the same time, according to data from the European Center for Digital Competitiveness, released in early September 2021, Russia's digital competitiveness has decreased by 67 points over three years.

In 2021 Russia ranked 25th among 120 countries included in the study in the world Inclusive Internet Index. This index was published by the analytical division

of the British Economist magazine — The Economist Intelligence Unit.

According to the Center for Innovation in the Financial Sector of the Skolkovo Foundation, published in November 2021, Russia ranked first in the world in the use of mobile proximity payments. The penetration rate of mobile proximity payments in Russia was 78 %. In terms of penetration of fintech services Russia ranks third in the world with a level of 82 %, trailing only India and China.

In the fall 2021 it became known that Russia ranked 19th in the reputable "Top500" rating of supercomputers with the new "Chervonenkis" computer by Yandex. For the first time in a long time, Russia was in the top twenty in this rating. In total, seven Russian supercomputers are listed in the rating — three by Yandex, two by Sberbank and one by MTS and by Moscow State University. In terms of the number of supercomputers listed in the Top 500, Russia ranks 10th.

## 1.2.1. City Ratings

**Innovation Cities Global Index 2018**

In 2018, 500 cities from all over the world were among the participants in the Innovation Cities Index rating of the most innovative cities in the world. The rating allows to determine the potential of participants in the field of innovative ideas development, introduction and translation. Cities are evaluated on 162 special indicators, including: development of market relations, investments in technological progresses, entrepreneurial climate, levels of science, education, health and culture development, as well as levels of sports, financial and information and communication infrastructure of the city. 2015 — was the year of the rise of Russian cities, while 2017 was unsuccessful for all cities (except Moscow): city ratings literally collapsed, losing from 27 to 152 positions. In 2018, the decline in ratings affected all Russian cities, including the capital. In 2019, only a few Russian cities (including Moscow) improved their positions.

There seems to be no reason for such a reduction in the ratings of almost all Russian cities, since economic problems should not greatly affect the development, introduction and translation of innovative ideas. The changes taking place in Russia during the last 3 years have influenced innovation both negatively and positively, since the same economic crisis often forced companies and government structures to become more innovative.

In 2021, 15 cities out of 20 Russian cities included in the rating have improved their positions, and 5 showed a decrease (usually very small).

At the beginning of autumn 2022, a new version of this rating was not presented.

**Most Promising Cities in Terms of Investments in Technology, Innovation and Startups**

According to the Tech Cities of the Future rating, Moscow was among the TOP-20 most promising cities in Europe in 2020. Cities were evaluated in terms of raising capital, the availability of qualified employees and infrastructure development. The five leading cities included London, Paris, Dublin, Amsterdam, Berlin. The overall rating was formed based on the results the cities have scored in each of the five categories — Economic Potential, Innovation and Attractiveness, Level of Foreign Direct Investments, Startups Ecosystem and Profitability. The Russian capital ranked 18th among 76, and in one of the five categories of the rating ("Startups Ecosystem") it raised to the 10th line.

In 2021, Moscow moved up 14th place in the overall rating, and to the 6th place in the "Startups Ecosystem" ecosystem.

A new version of 2022 did not appear by the time of this chapter preparation.

**Best Ecosystems for Startups (StartupBlink)**

StartupBlink ranks not only the country, but also the city in the segment it studies. In the StartupBlink rating presented in 2021 Moscow retained 9th place it took a year earlier, and Saint-Petersburg moved down from 147th place to 199th. The positions of Novosibirsk (400th place, moved down 34 positions), Kazan (428th, 87 positions lost), Chelyabinsk (637th place, loss of 11 positions) and Yekaterinburg 680th place, loss of 138 positions) also worsened. Kaliningrad moved up 289 positions to 610th place, Tomsk — 272 positions to 677th.

In 2022, Russia as a whole in this rating moved down by 12 positions to 29th

## Changes in the positions of Russian cities in the Innovation Cities Global Index rating, place

| Name of the city | 2015 (↑ or ↓ relative to the previous version) | 2016–2017 | 2018 | 2019 | 2021 |
|---|---|---|---|---|---|
| Barnaul | — | 446 | 467 | 476 | 469 |
| Vladivostok | 367 (↑14) | 415 | 439 | 447 | 428 |
| Volgograd | 365 (↑13) | 432 | 436 | 444 | 401 |
| Yekaterinburg | 220 (↓7) | 358 | 402 | 416 | 385 |
| Izhevsk | 400 (↓6) | 454 | 466 | 482 | 455 |
| Kazan | 223 (↓1) | 339 | 375 | 393 | 366 |
| Kaliningrad | 303 (↑11) | 397 | 426 | 437 | 404 |
| Krasnoyarsk | 280 (↑23) | 412 | 443 | 438 | 437 |
| Moscow | 45 (↑18) | 43 | 48 | 38 | 34 |
| Nizhny Novgorod | 273 (↑9) | 388 | 421 | 421 | 423 |
| Novosibirsk | 244 (↑9) | 394 | 416 | 405 | 406 |
| Omsk | 362 (↑9) | 421 | 441 | 449 | 439 |
| Orenburg | 406 (↑1) | 448 | 473 | 473 | 454 |
| Perm | 340 (↑14) | 419 | 440 | 441 | 450 |
| Rostov-on-Don | 289 (↑28) | 392 | 425 | 419 | 425 |
| Samara | 282 (↓16) | 434 | 427 | 440 | 421 |
| Saint-Petersburg | 48 (↑33) | 75 | 93 | 109 | 121 |
| Saratov | 341 (↑14) | 437 | 456 | 463 | 448 |
| Togliatti | 407 (↑1) | 455 | 474 | 475 | 465 |
| Tomsk | 339 (↑4) | 444 | 462 | 460 | 452 |
| Total cities in the rating: | 442 | 500 | 500 | 500 | 500 |

place, and this happened despite the fact that the drafters of the rating have acknowledged the progress of the country in the development of an ecosystem for startups. They responded to the start of a special military operation, which, in their opinion, does not contribute to the emergence and development of new high-tech companies.

At the same time, Russia was represented in this rating by 9 cities (in terms of this indicator, Russia ranks 17th): Petersburg (237th place), Kazan (555), Novosibirsk (589), Kaliningrad (772), Chelyabinsk (839), Tomsk (854), Ulyanovsk (861).

In the fall 2021 it became known that Moscow took second place in the Global ICT Excellence Awards contest in the Startup Ecosystem nomination.

**The World's 100 Best Cities** (for living and business activities)

In October 2020, the Resonance Consultancy consulting company specializing in the field of real estate and economic development announced a new edition of the rating of the best cities in the world for living, business and tourism (The World's 100 Best Cities). Moscow ranked fourth against the fifth line a year earlier. The authors of the study noted Moscow's leadership in the "Product" category, again recognizing it as the best judging by such parameters as infrastructure (in particular, a network of airports), cultural sites and attractions.

In addition, the capital of Russia entered the top three megacities in the "Place" category, which analyzes the quality of the urban environment and safety. The city also improved its position in the "People" category, moving up in this category from the 143th place to the 12th place only in a year. Moscow ranked second in the world in the number of residents with higher education.

St. Petersburg was also included in the rating, and ranked 16th in 2020 (this Russian city took 35th place in the previous list).

In 2021 Moscow retained the 4th place. St. Petersburg moved down to the 17th position.

# 1.3. Achievements of Individual Russian Companies and References of these Companies Global IT Ratings

It is difficult to draw an unambiguous conclusion in the last 4 years about the deterioration or improvement of the position of Russian companies in various world ratings. Some reduction in the representation of Russian software developers in world ratings and in analyst reports is largely due to the fact that a number of companies have changed their Russian jurisdiction to a foreign one. Reorientation to the Russian market and the markets of developing countries is also important for the drafters of ratings located in Western countries. At the same time, new Russian companies appeared replacing some companies excluded from world ratings and analyst reports.

**The Global Outsourcing 100**

The International Association of Outsourcing Professionals (IAOP) has been compiling ratings of the best outsourcing companies in the world for 15 consecutive years.

The representation of Russia in the main IAOP rating in 2015–2021 changed slightly, while in the previous decade it gradually increased. In 2022, it sharply decreased from six to two companies — Auriga and First Line Software. Apparently, getting into this rating has become irrelevant for other companies, as they have curtailed their activities in the markets of Western countries.

In some categories, other Russian companies can be noted by IAOP analysts. Reksoft is reportedly included in the Leader Judging Size category, which is awarded for meeting the highest international standards and for demonstrating the constant growth of professional expertise.

**Russian companies in the The Best of The Global Outsourcing (The Global Outsourcing 100) rating in 2015–2021**

| No. | Name of Russian company | 2015 | 2016 | 2017 | 2018 | 2019 (getting into the rating) | 2020 | 2021 | 2022 |
|---|---|---|---|---|---|---|---|---|---|
| 1 | Artezio | Rising Star | — | — | Rising Star | — | Rising Star | Rising Star | — |
| 2 | Auriga | Rising Star | Rising Star | Rising Star | Rising Star | + | Rising Star | Rising Star | Rising Star |
| 3 | Luxoft | Leader | Leader | Leader | Leader | + | — | — | — |
| 4 | MAYKOR | Leader | Leader | Leader | Leader | + | — | — | — |
| 5 | First Line Software | — | — | Rising Star | — | + | Rising Star | Rising Star | Rising Star |
| 6 | ICL Services | — | Leader | Leader | Leader | + | Leader | Leader | — |
| 7 | MERA | Leader | — | Leader | Leader | + | — | — | — |
| 8 | SimbirSoft | — | — | — | — | + | Rising Star | Leader | — |
| 9 | Reksoft | — | — | — | — | — | — | Leader | — |

### Magic Quadrants of Gartner

The ratings of the Gartner Group analytical agency, which annually compiles the so-called “Gartner Magic Quadrants” represent some of the most prestigious ratings for product companies (software manufacturers). They indicate the products and companies that are among the leaders in certain software segments.In 2021–2022, no new Russian companies appeared in the magic quadrant.

On May 5, 2022, Gartner informed Russian IT vendors of its withdrawal from the Russian market. The letter on this subject says that the decision to leave is associated with the current economic situation and the increasingly complicated conditions for doing business in the country. In its letter, Gartner states that it will no longer cover Russian-based vendors in its research. In addition, from April 11, the company will remove their products from Gartner Peer Insights, an online platform for ratings and customer reviews of software and IT services.

Apparently, after the departure of Gartner, Russian companies will seek to get into the reports of other research companies.

In 2022, the Russian company SPIRIT, the developer of the VideoMost videoconferencing product, is included in the spring G2 report with a map of video conferencing products. According to the analysis of user reviews, the VideoMost product rating is 4.5 out of 5. G2 is the largest international marketplace on which customers can compare and select products and services that most precisely meet their needs and business goals.

In January 2022 Kaspersky Lab is named a key player (Major Player) in the field of endpoint protection for large, medium and small businesses in two IDC reports (this company continued to operate in Russia in the fall of 2022).

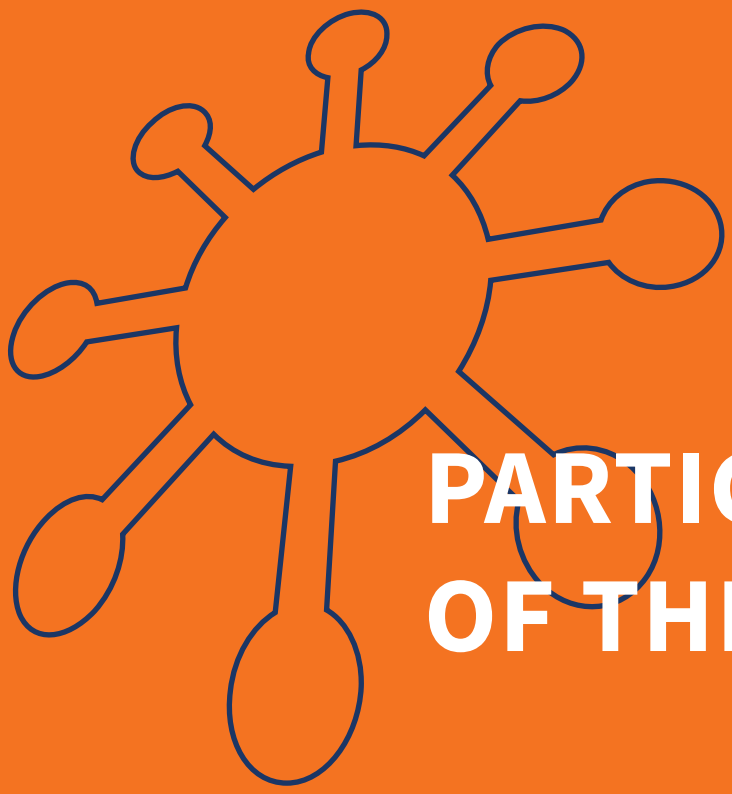
In July 2022, it became known that, according to the results of a global study conducted by Forrester Research, Diasoft has confirmed its status of the leading supplier of banking platforms in Europe in terms of the total number of transactions in 2021, and also was ranked sixth in the list of world leaders in the banking platform market in terms of the number of repeated sales.

In January 2022, IFI Claims Direct named Kaspersky Lab the leader among those Russian companies that have been granted patents in the United States in 2021. According to the analytical report, 43 IT vendor patents were registered in the United States during this period. In total, Kaspersky Lab has received 412 US patents and more than 1,200 patents around the world, including Russia, the EU, China and Japan throughout its history.

In spring 2022, it became known that scientists from the Russian Quantum Center have patented a new architecture of a qudit-based quantum processor. It will increase the power of an ion based quantum computer, which was developed in the end of 2021. Only three states have similar developments: USA, China and Austria.

**Russian companies in the magic quadrant of Gartner**

| Gartner Magic Quadrant Name | Year of publication | Company Name |
|---|---|---|
| Endpoint Protection Platforms | 2021 | Kaspersky |
| Enterprise Data Loss Prevention | 2017 | InfoWatch<br>Zecurion<br>SearchInform |
| Enterprise Backup and Recovery Software Solutions | 2021 | Veeam<br>Acronis |
| Treat Intelligence | 2014 | Kaspersky Lab<br>Group IB |
| Application Security Testing | 2018 | Positive Technologies (Leader) |
| Operational Technology Security | 2016 | Positive Technologies |
| Data Center Backup and Recovery Software/Solutions | 2020 | Veeam<br>Acronis |
| Integrated Revenue and Customer Management for CSPs | 2019 | Nexign |
| Meeting Solutions | 2020, 2021 | TrueConf |



# PARTICIPANTS OF THE SURVEY

| Company | Head office location | Web | E-mail | Phone | Specialization | Expertise in areas corresponding to global technological trends |
|---|---|---|---|---|---|---|
| **2Nova Interactive** | Saint-Petersburg | 2nova.ru | hello@2nova.ru | (812) 318-4085 | Custom software development | |
| **7bits** | Omsk | 7bits.it | | | Custom software development | AR & VR Development; Artificial Intelligence; Big Data & BI; IoT; Smart City |
| **A7 Systems** | Saint-Petersburg | a7systems.ru | info@a7systems.ru | (812) 603-7137 | Development of programming tools and database | Artificial Intelligence; Big Data & BI; IoT; Smart City |
| **Across Engineering** | Moscow | across.ru | info@across.ru | (495) 517-8033 | Custom software development | |
| **Active Business Consult / VS Robotics** | Moscow | vsrobotics.ru | pr@vsrobotics.ru | (495) 136-5182 | Embedded software (equipment, devices) | Artificial Intelligence; Big Data & BI |
| **ALAN-IT** | Yaroslavl | alan-it.ru | info@alan-it.ru | (485) 237-0303 | Development of own analytical services | Artificial Intelligence; Big Data & BI; IoT; Smart City |
| **Alee Software** | Saint-Petersburg | alee.ru | info@alee.ru | (812) 309-7859 | Replicated enterprise (institution) management, document of automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other); Custom software development | |
| **ALPOM** | Saint-Petersburg | alpom.ru | inbox@alpom.ru | (921) 745-5069 | Custom software development; Embedded software (equipment, devices) | |
| **Altcraft** | Ryazan | altcraft.com | contact@altcraft.com | (491) 290-1004 | Replicated enterprise (institution) management, document of automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other) | Big Data & BI |
| **ALT-SOFT** | Saint-Petersburg | altsoft.spb.ru | altsoft@altsoft.spb.ru | (921) 956-7961 | Replicated enterprise (institution) management, document of automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other) | Artificial Intelligence |
| **Alvion Europe** | Sevastopol | alvioneurope.ru | info@alvioneurope.ru | (978) 767-9890 | Custom software development; Website designing | Big Data & BI; IoT; Smart City |

| Company | Head office location | Web | E-mail | Phone | Specialization | Expertise in areas corresponding to global technological trends |
|---|---|---|---|---|---|---|
| **Angels IT** | Voronezh | angelsit.ru | it@angelsit.ru | (473) 255-5007 | Replicated enterprise (institution) management, document of automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other); Embedded software (equipment, devices) | AR & VR Development; Artificial Intelligence; IoT; Smart City |
| **Arax Group** | Moscow | araxgroup.ru | info@araxgroup.ru | (495) 504-8263 | Replicated enterprise (institution) management, document of automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other) | Artificial Intelligence; Blockchain Technology |
| **Arcadia** | Saint-Petersburg | softwarecountry.com | info @softwarecountry.com | (812) 610-5955 | Custom software development | Artificial Intelligence; Big Data & BI |
| **A-Real Consalting** | Yaroslavl | xserver.a-real.ru | hello@a-real.ru | (800 )555-9297 | Information security solutions | Artificial Intelligence |
| **Artezio** | Moscow | artezio.com | welcome@artezio.com | (495) 981-0531 | Custom software development | Artificial Intelligence; Big Data & BI; Blockchain Technology |
| **ASys Soft** | Moscow | asys.ru | asys2007@mail.ru | (929) 539-7815 | Custom software development | |
| **ATM** | Moscow | атм.москва | mail@atm.msk.ru | (499) 490-2207 | Replicated enterprise (institution) management, document of automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other) | Big Data & BI; IoT; Smart City |
| **Auriga** | **Moscow** | **auriga.com** | **pr@auriga.com** | **(495) 713-9900** | **Custom software development** | **Embedded and system-level development; Big Data; ML; IoT** |
| **AV Soft** | Moscow | avsw.ru | konkurs@avsw.ru | (495) 988-9225 | Information security solutions | Artificial Intelligence; Big Data & BI; IoT; Smart City |


Established in 1990, Auriga is one of the top 100 leading outsourcing software R&D providers worldwide. Headquartered in the U.S., with 600+ employees located across seven development centers and operating 13+ embedded testing R&D labs, Auriga delivers 100+ projects yearly. We offer custom software development, product maintenance, re-engineering and porting, integration, testing and test automation services for medical device, automobile and construction tools manufacturers, industrial automation and power management companies, consumer electronics, retail & logistics, software vendors (ISVs), semiconductors and hardware manufacturers (OEMs), like Chrysler, Draeger Medical, nVent and others.

| Company | Head office location | Web | E-mail | Phone | Specialization | Expertise in areas corresponding to global technological trends |
|---|---|---|---|---|---|---|
| **AVS Consulting** | Moscow | avsconsulting.ru | avs@avsconsulting.ru | (925) 999-3071 | Custom software development, Website designing | AR & VR Development; Artificial Intelligence; Big Data & BI; Blockchain Technology; Smart City |
| **AXELOT** | Moscow | axelot.ru | a.dolgikh@axelot.ru | (495) 961-2609 | Replicated enterprise (institution) management, document of automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other) | |
| **Axilon** | Moscow | axilon.ru | info@axilon.ru | (916) 815-3499 | Replicated enterprise (institution) management, document of automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other), Custom software development | Big Data & BI |
| **BOBDAY** | Krasnodar | bobday.ru | info@bobday.ru | (800) 201-3375 | Replicated enterprise (institution) management, document of automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other); Custom software development | Big Data & BI |
| **Brain Systems Group** | Saint-Petersburg | brainsystems.ru | zakupki @brainsystems.ru | (800) 555-3107 | Replicated enterprise (institution) management, document of automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other) | |
| **Celsus** | Kaluga | celsus.ai | celsus@celsus.ai | (965) 077-7705 | Embedded software (equipment, devices) | Artificial Intelligence |
| **CenovikPRO** | Moscow region | cenovik.pro | info@cenovik.pro | (495) 215-5248 | Replicated enterprise (institution) management, document of automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other) | Artificial Intelligence; Big Data & BI |
| **Cerebro** | Moscow | cerebrohq.com | info@cerebrohq.com | (499) 110-8234 | Basic software development (DBCS, OS, office applications, virtualization tools, programming languages and tools) | |
| **Citrus** | Ioshkar-Ola | citrus-soft.ru | alex@citrus-soft.ru | (987) 702-7147 | Website designing | |
| **CodeInside** | Penza | codeinside.ru | office@codeinside.ru | (8412) 636-736 | Custom software development | Artificial Intelligence; IoT |

| Company | Head office location | Web | E-mail | Phone | Specialization | Expertise in areas corresponding to global technological trends |
|---|---|---|---|---|---|---|
| **CommuniGate Systems** | Moscow | communigate.ru | russia @communigate.ru | (499) 271-3154 | Development of unified communications technologies | |
| **Cortex** | **Krasnodar** | **cx.technology** | **info@cx.technology** | **(988) 245-9945** | **Custom software development; Scientific researching** | **Artificial Intelligence; Blockchain Technology** |
| | | | | | | |
| **Crosstech Solutions Group** | Moscow | ct-sg.ru/ | info@ct-sg.ru | (495) 741-8864 | Information security solutions | Artificial Intelligence; Big Data & BI |
| **CVisionLab** | Taganrog | cvisionlab.com | info@cvisionlab.com | (903) 464-7047 | Custom software development | Artificial Intelligence |
| **Cyberprotect** | Moscow | cyberprotect.ru | info@cyberprotect.ru | (903) 203-2299 | Information security solutions | |
| **Data East** | Novosibirsk | dataeast.com | support@dataeast.com | (383) 332-0320 | Navigation and geographic information systems | Artificial Intelligence; Big Data & BI; Smart City |
| **DDoS-Guard** | Rostov-on-Don | ddos-guard.net | info@ddos-guard.net | (495) 215-0387 | Information security solutions | Artificial Intelligence |
| **Development Center SAPR "GeoS"** | Nizhny Novgorod | k3info.ru | sale@k3info.ru | (831) 435-2539 | Replicated enterprise (institution) management, document of automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other) | |

Cortex

Cortex Technology is an international software group focused on digital commodity trading, agritech, biotech, and digital transformation of state authorities.

Our key practices:

— Digital commodity markets for metals and chemicals, trade platforms integration (Nasdaq, CQG, public blockchains), real-time data exchange, blockchain technologies (custom blockchain, dAps, smart-contracts);

— MedTech and BioTech: end-to-end product lifecycle automation, procurement and contract management, bioinformatics, machine learning for biological and medical data, telemedicine SaaS;

— Incident management in casinos;

— Regional decision support and incident management systems.

| Company | Head office location | Web | E-mail | Phone | Specialization | Expertise in areas corresponding to global technological trends |
|---|---|---|---|---|---|---|
| **Diasoft** | **Moscow** | **diasoft.ru** | **pr@diasoft.ru** | **(495) 780-7575, (495) 789-9339** | **Software development for the financial and other industries; custom software development; enterprise resource planning (ERP platform); development of basic software (DBMS, programming tools)** | **Business processes management, visual analytics, Big Data, AI, ML** |
| DIASOFT all for real | Diasoft is one of the largest Russian providers of IT solutions. During its 31-year history, it has accumulated a unique experience in development, implementation and support of comprehensive IT systems for customers from different industries, with the main focus on financial institutions.<br>Diasoft is recognized as a systemically important company for the Russian information and communications industry. Its products are listed in the Unified Register of Russian Programs for Electronic Computers and Databases, and are recognized by Gartner, IDC, Forrester, BIAN and other global experts.<br>The company is headquartered in Moscow, has branches in Saint Petersburg, Yaroslavl, Cheboksary, Perm, Novosibirsk, a representative office in Germany and a subsidiary in Vietnam. | | | | | |
| **Digital Design** | Saint-Petersburg | digdes.ru | info@digdes.com | (812) 346-5833 | Replicated enterprise (institution) management, document of automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other); Custom software development | Artificial Intelligence; Digital Workplace |
| **DZ SYSTEMS** | Moscow | dzsystems.com | sales@dz.ru | (495) 225-7693 | Mobile applications; Custom software development | Artificial Intelligence; Big Data & BI; Smart City |
| **Econophysica** | Tomsk | econophysica.com | conactus @econophysica.com | (3822) 900-601 ext: 1003 | Custom software development; Replicated enterprise (institution) management, document of automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other) | Artificial Intelligence; Big Data & BI; Smart City |
| **EC-Tavrida** | Simferopol | ec-tavrida.ru | ec-tavrida@yandex.ru | (978) 780-6700 | Custom software development | |
| **Edelink** | Saint-Petersburg | edelink.ru | info@edelink.ru | (812) 507-3804 | Replicated enterprise (institution) management, document of automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other) | PropTech |

| Company | Head office location | Web | E-mail | Phone | Specialization | Expertise in areas corresponding to global technological trends |
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| **e-legion** | Saint-Petersburg | e-legion.ru | anna.krasavtseva@e-legion.com | (981) 844-4060 | Mobile applications; Custom software development | Big Data & BI; IoT; Smart City |
| **ErmineSoft ltd.** | Novosibirsk | erminesoft.com | denis@erminesoft.ru | (913) 926-2697 | Custom software development; Website designing | AR & VR Development; Artificial Intelligence |
| **Etton Grup** | Kazan | etton.ru | info@etton.ru | (800) 100-0815 | Custom software development | Artificial Intelligence; Big Data & BI; Blockchain Technology; Smart City |
| **Evavision** | Ekaterinburg | evavision.tv | sales@evavision.tv | | Development of a broadcasting control system for a network of video monitors of a new generation | IoT; Smart City |
| **FAYGROUP** | Moscow region | faygroup.ru | info@faygroup.ru | (964) 786-6003 | Custom software development | IoT |
| **Fidesys LLC** | Moscow | cae-fidesys.com | v.a.levin@mail.ru | (495) 177-3618 | Scientific researching; Replicated enterprise (institution) management, document of automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other) | Artificial Intelligence; IoT; Smart City |
| **FlexSoft** | Moscow | flexsoft.com/about | info@flexsoft.com | (495) 788-0325 | Replicated enterprise (institution) management, document of automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other) | Big Data & BI |
| **Fogstream** | Khabarovsk | fogstream.ru | org@fogstream.ru | (4212) 909-809 | Custom software development | Blockchain Technology; Smart City |
| **Foresight** | **Moscow** | **fsight.ru** | **info@fsight.ru** | **(495) 137-5498** | **BI-systems** | **Artificial Intelligence, Big Data & BI, IoT, Smart City** |

foresight.

Foresight is one of the largest Russian BI vendors. The company delivers to the market native and mature solutions for data analysis and corporate mobility development – Foresight Analytics Platform and Foresight Mobile Platform.

Foresight Analytics Platform features high performance, supports various data types and their data sources, includes machine learning, big data, modeling and forecasting technologies.

The company has also developed such products as Foresight Budgeting, Foresight Investment Management, and FlyBI used for business analysis on-the-go. Company products are used by companies in corporate, state and banking sectors. The Foresight partner network includes more than 60 Russian IT companies.

| Company | Head office location | Web | E-mail | Phone | Specialization | Expertise in areas corresponding to global technological trends |
|---|---|---|---|---|---|---|
| **Format Koda** | **Saint-Petersburg** | **formatkoda.ru** | **info@formatkoda.ru** | **(812) 336-5533** | **Custom software development; Mobile applications** | **Artificial Intelligence, Big Data & BI, IoT, Smart City** |
|  | | FormatKoda is a premier provider of software engineering, software enablement, and digital transformation advisory services.<br>The company leverages its agile technological excellence to efficiently deliver complex projects in retail digitalization, web content management & eCommerce, healthcare IT & real world evidence and data, machine learning and enterprise data management. Software engineering services include Mobile and IoT Dev, Test Automation, and Big Data Implementation. | | | | |
| **GDC Services** | Usady town (Tatarstan) | icl-services.com | pr@icl-services.com | (800) 333-9870 | Custom software development; Replicated enterprise (institution) management, document of automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other) | AR & VR Development; Artificial Intelligence; Big Data & BI; IoT |
| **Gektor** | Moscow | gektorstroi.ru | support@gektorstroi.ru | (495) 510-1545 | Replicated enterprise (institution) management, document of automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other) | |
| **GEOCAD plus** | Novosibirsk | geocad.ru | info@geocad.ru | (383) 352-1333 | Navigation and geographic information systems | AR & VR Development; Smart City |
| **Geoscan Group** | Saint-Petersburg | geoscan.aero | info@geoscan.aero | (812) 363-3387 | Professional unmanned technologies; Embedded software (equipment, devices) | AR & VR Development; Artificial Intelligence; IoT |
| **Global Rus Trade** | Moscow | globalrustrade.com/ru | info@globalrustrade.com | (495) 256-2625 | International trade Marketplace | |
| **GLOLIME LTD** | Saint-Petersburg | glolime.ru | info@glolime.com | (812) 334-9384 | Specialized tablet computers and development of a management system for enterprises and organizations on their basis | 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.ru, harman.com | Olga.Sheinfeld@harman.com | (905) 664-1155 | Custom software development | AR & VR Development; Artificial Intelligence; Big Data & BI; IoT; Smart City |

| Company | Head office location | Web | E-mail | Phone | Specialization | Expertise in areas corresponding to global technological trends |
|---|---|---|---|---|---|---|
| **IBS InfiniSoft** | **Moscow** | **ibs-infinisoft.ru** | **ymaksimenko@ibs.ru; info@ibs-infinisoft.ru** | **(495) 967-8080; (495) 967-8081** | **Custom software development; Mobile applications; Website designing** | |
| IBS InfiniSoft | | IBS InfiniSoft is a development hub of IBS group of companies with global 30 years' experience and big number of projects providing technology solutions and drive business change for customers in Russia and abroad. We focus on the business landscape with industry knowledge and digital capabilities, combining strategy and results-driven software development. IBS InfiniSoft operates efficiently with an agile workforce of 1000+ developers and other IT specialists. It combines a unique mixture of development excellence and deep industry expertise, helping our clients innovate in the areas of State administration, Automotive industry, Financial services, Healthcare, Media and Telecommunications, Retail, Oil and Gas, Energy, and other industries. We offer software, SAP, mobile, 1C and web development, as well as UI/UX design, UX-research, architecture & consulting services. | | | | |
| **Ideas World** | Simferopol | iw-group.pro | info@iw-group.pro | (800) 301-0762 | Custom software development; Mobile applications | |
| **INEC-IT** | Moscow | inec.ru | support@inec.ru | (495) 786-2230 | Replicated enterprise (institution) management, document of automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other) | |
| **InetPartners** | Moscow | callpy.com | business @inetpartners.ru | (926) 613-4870 | Custom software development | Big Data & BI; IoT |
| **Infinity Video Soft** | Tomsk | videograce.ru | contact @videograce.com | (903) 953-3424 | Basic software development (DBCS, OS, office applications, virtualization tools, programming languages and tools) | |
| **INFOPRO** | Moscow | info-pro.ru | post@info-pro.ru | (800) 600-2401 | Custom software development | Artificial Intelligence; Big Data & BI; Blockchain Technology; IoT; Smart City |
| **Information Systems and Services** | **Novosibirsk** | **isands.ru** | **info@isands.ru** | **(800) 775-1986** | **Replicated enterprise (institution) management, document of automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other)** | **Artificial Intelligence; Big Data & BI; IoT; Smart City** |
| ИНФОРМАЦИОННЫЕ СИСТЕМЫ И СЕРВИСЫ | | Information Systems and Services, LLC is a company that uses its own low-code development platform IS.PROMETHEUS to create applications quickly and easily. The company's products are based on microservices architecture to show solid performance in handling the growing number of requests and are used by a variety of large enterprises. | | | | |

| Company | Head office location | Web | E-mail | Phone | Specialization | Expertise in areas corresponding to global technological trends |
|---|---|---|---|---|---|---|
| **INFORM-TEKHNIKA** | Moscow | minicom.ru | inf@infotek.ru | (495) 662-7321 | Developer and manufacturer of modern means of communication | |
| **Inline Group** | Voronezh | inlinegroup-c.ru | contacs @inlinegroup-c.ru | (910) 749-8328 | Replicated enterprise (institution) management, document of automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other) | AR & VR Development |
| **Innotech** | **Moscow** | **inno.tech** | **info@inno.tech** | **(800) 500-3333** | **Custom software development** | **Artificial Intelligence; Big Data & BI** |
| INNOTECH | Innotech Group (part of Group T1) is a fast-growing high-tech IT company. Since 2020 we have been providing cutting edge software solutions for business digitalization. Innotech Group builds partnerships with leading companies in the financial sector, offering them comprehensive solutions for front and back offices, modern fintech products and big data systems. Moreover, Innotech Group carries out custom-made technological projects of any complexity, helping its clients on the path of digital transformation. | | | | | |
| **Inostudio Solutions** | Taganrog | inostudio.com | russoft@inostudio.com | (8634) 320-318 | Custom software development | AR & VR Development; Artificial Intelligence |
| **INOVENTICA Technologies** | Moscow | inoventica-tech.ru | info@inoventica-tech.ru | (495) 646-7308 | Information security solutions | |
| **Inreco LAN** | Vladimir | inrecolan.com | sergey.pyatigorskiy @inrecolan.com | (492) 244-4090 | Custom software development | |
| **Integral** | Saint-Petersburg | integral.ru | eco@integral.ru | (812) 740-1100 | Stationary software for environmental calculations | |
| **ISGneuro** | Moscow | isgneuro.com | info@isgneuro.com | (495) 232-2233 | Development, support and development of our own product line of analytical software | Artificial Intelligence; Big Data & BI; IoT |
| **iSpring** | Ioshkar-Ola | ispring.com | buh@ispring.ru, valentina.bulygina @ispring.com | (960) 099-0074 | Online Training Software | |
| **ISPsystem** | Irkutsk | ispsystem.ru | e.lavrenteva @ispsystem.com | (963) 305-0563 | Embedded software (equipment, devices); Basic software development (DBCS, OS, office applications, virtualization tools, programming languages and tools); Replicated enterprise (institution) management, document of 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 |
|---|---|---|---|---|---|---|
| **IT Pro** | Moscow | biqube.ru | dp@itprocomp.ru | (952) 056-1199 | Custom software development | Artificial Intelligence; Big Data & BI |
| **ITB LLC** | Saint-Petersburg | itb.spb.ru | manager@itb.spb.ru | (812) 335-0145 | Information security solutions | |
| **ITC Solutions** | Sevastopol | itcsolutions.ru | dm@itcsolutions.ru | (989) 836-9939 | Outsourcing/ outstaff architecture, development, system and business analysis, software testing | |
| **ITConstruct** | Novosibirsk | itconstruct.ru | office@itconstruct.ru | (383) 375-1277 | Website designing | |
| **ITPS** | Perm | itps.com | info@itps-russia.ru | (495) 660-8181 | Replicated enterprise (institution) management, document of automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other) | Artificial Intelligence; Big Data & BI; IoT |
| **IVA Technologies (IVKS)** | Innopolis | iva-tech.ru | info@iva-tech.ru | (495) 134-6677 | Developers of innovative IT solutions for building a modern digital infostructure | Artificial Intelligence |
| **IZZZIO** | Moscow | izzz.io/ru | info@izzz.io | (905) 520-3080 | Custom software development | Artificial Intelligence; Big Data & BI; Blockchain Technology; IoT |
| **KAMIS** | Saint-Petersburg | kamis.ru | info@kamis.ru | (812) 274-3522 | Replicated enterprise (institution) management, document of automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other) | Smart City |
| **KODEKS** | Saint-Petersburg | kodeks.ru | nishonov@kodeks.ru | (812) 740-7887 | Replicated enterprise (institution) management, document of automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other) | AR & VR Development; Artificial Intelligence |
| **LANIT-TERCOM** | Saint-Petersburg | lanit-tercom.ru | contact @lanit-tercom.com | (812) 922-2091 | Custom software development | AR & VR Development; Artificial Intelligence; Big Data & BI; Blockchain Technology; Smart City |
| **Lartech** | Saint-Petersburg | lar.tech | info@lar.tech | (812) 339-4501 | Embedded software (equipment, devices) | IoT; Smart City |

| Company | Head office location | Web | E-mail | Phone | Specialization | Expertise in areas corresponding to global technological trends |
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| **Lexema** | Ufa | lexema.ru | info@lexema.ru | (347) 284-7000 | Replicated enterprise (institution) management, document of automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other) | Artificial Intelligence; Big Data & BI |
| **Lotsiya** | Moscow | loodsen.ru | welcome@loodsen.ru | (495) 730-2023 | Custom software development; Mobile applications; Website designing | Big Data & BI |
| **Luxms Group** | Saint-Petersburg | luxmsbi.com | sales@luxmsbi.com | (812) 974-7403 | Basic software development (DBCS, OS, office applications, virtualization tools, programming languages and tools) | Artificial Intelligence; Big Data & BI; IoT; Smart City |
| **Makves** | Moscow | makves.ru | marketing@makves.ru | (495) 150-5406 | Information security solutions | |
| **MATSBKT-SEZ** | Moscow | interpolymech.com | nnevskaya@global-rc.ru | (916) 609-0790 | Custom software development; Embedded software (equipment, devices) | AR & VR Development; Artificial Intelligence; IoT |
| **Megaputer Intelligence** | 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 |
| **Microolap Technologies** | Tatarstan | microolap.ru | formal@microolap.ru | (926) 326-9277 | Information security solutions | Network Traffic Analysis (NTA) |
| **Monolit-Info** | Saint-Petersburg | monolit.com | alex@monolit.com | (921) 937-8542 | Replicated enterprise (institution) management, document of automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other); Custom software development | Big Data & BI |
| **Motiware** | Belgorod | motiw.ru | office@motiw.ru | (472) 278-0000 | Custom software development; Replicated enterprise (institution) management, document of 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 |
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| **Moy Klass** | Ekaterinburg | moyklass.com | info@moyklass.com | (495) 108-5239 | Replicated enterprise (institution) management, document of automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other) | Big Data & BI |
| **New space** | Moscow | newspacecorporation.com | info @newspacecorporation.com | (928) 165-3302 | Custom software development; Website designing | Big Data & BI; Blockchain Technology; IoT; Smart City |
| **Nexign** | Saint-Petersburg | nexign.com/ru | Yekaterina.Petrova @nexign.com | (812) 326-1299 | BSS solution provider | IoT |
| **NitrosData** | Moscow | nitrosdata.ru | info@nitrosbase.com | (495) 101-4324 | | Big Data & BI |
| **NooSoft** | Bryansk | noosoft.ru | lv@noosoft.ru | (913) 271-3993 | Custom software development | Artificial Intelligence; Big Data & BI |
| **Nord Clan** | Ulyanovsk | nordclan.com | welcome @nordclan.com | (499) 404-0943 | Custom software development; Mobile applications; Replicated enterprise (institution) management, document of automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other) | Artificial Intelligence |
| **NotiSend** | Tomsk | notisend.ru | | | Marketing platform for business | |
| **Novosibirsk Scientific and Technological Center** | Novosibirsk | nntc.pro | ematveeva@nntc.pro | (923) 248-2615 | Replicated enterprise (institution) management, document of automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other) | Artificial Intelligence; Big Data & BI |
| **NTP-DIP** | Saint-Petersburg | ntp-dip.ru | dip_zenit@mail.ru | (911) 928-8478 | Replicated enterprise (institution) management, document of automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other) | |
| **OFT** | Bryansk | oft32.ru | oft@inbox.ru | (920) 602-3335 | Replicated enterprise (institution) management, document of 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 |
|---|---|---|---|---|---|---|
| **Open Solutions** | Penza | osinit.com | info@osinit.com | (800) 250-9669 | | AR & VR Development; Artificial Intelligence; Big Data & BI; Blockchain Technology; IoT; Smart City |
| **Piter-Soft** | Saint-Petersburg | piter-soft.ru | info@piter-soft.ru | (812) 333-0860 | Custom software development | |
| **POWWWER** | Novosibirsk | powwwer.io | a.mitasov@powwwer.io | (383) 318-1043 | Custom software development; Replicated enterprise (institution) management, document of automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other) | Blockchain Technology; IoT |
| **Project** | Moscow | project-llc.ru | sdmitriy@project-llc.ru | (985) 890-0000 | Replicated enterprise (institution) management, document of automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other) | Artificial Intelligence; Big Data & BI |
| **PROMT** | Saint-Petersburg | promt.ru | julia.epiphantseva @promt.ru | (812) 655-0350 | Replicated enterprise (institution) management, document of automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other) | Artificial Intelligence; Big Data & BI |
| **Prostorlab** | Moscow | prostorlab.com | korolev@enersys.ru | (926) 296-0502 | Replicated enterprise (institution) management, document of automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other) | IoT; Smart City |
| **PROTEI** | Saint-Petersburg | protei.ru | sales@protei.ru | (812) 449-4727 | Embedded software (equipment, devices) | Big Data & BI; IoT; Smart City |
| **RAIDIX** | Saint-Petersburg | raidix.ru | request@raidix.com | (812) 622-1680 | Basic software development (DBCS, OS, office applications, virtualization tools, programming languages and tools) | Artificial Intelligence; Big Data & BI; IoT; Smart City |

| Company | Head office location | Web | E-mail | Phone | Specialization | Expertise in areas corresponding to global technological trends |
|---|---|---|---|---|---|---|
| **Raketa** | **Moscow** | **raketa.world** | **hello@raketa.travel** | **(925) 655-9007** | **Replicated enterprise (institution) management, document of automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other)** | **Big Data & BI** |
| RAKETA | “Raketa” Company is a developer of the digital platform and the mobile application for business trips and expense management. Our solution helps commercial and government companies save up to 30% of business travel budgets and up to 90% of employees' working time, makes the process of organizing business trips and expense management fully digital and automated.<br>“Raketa” is the winner of the prestigious Buying Business Travel Awards in the Technology category in 2022 and the best Online booking tool in 2018.<br>The company's offices are located in Moscow, Vladivostok, Yekaterinburg, Novosibirsk, Almaty, Nur-Sultan, Bishkek. The staff has 100 employees. Now we have more than 300 largest companies from Russia and abroad in our portfolio. | | | | | |
| **RDTEX** | Moscow | rdtex.ru | marketing@rdtex.ru | (495) 995-0999 | IT Services | Artificial Intelligence; Big Data & BI; IoT |
| **red_mad_ robot Tomsk** | Tomsk | redmadrobot.ru | ee@redmadrobot.com | (909) 542-2169 | Custom software development; Website designing; Mobile applications | Blockchain Technology; IoT |
| **Redline** | Tomsk | redlg.ru | info@redlg.ru | (999) 619-7912 | Website designing; Mobile applications | IoT |
| **Reksoft** | Moscow | reksoft.ru | info@reksoft.ru | (495) 926-1771 | Custom software development | Artificial Intelligence; Big Data & BI; Blockchain Technology; IoT; Smart City |
| **Relex** | Voronezh | relex.ru | market@relex.ru | (473) 271-1711 | Basic software development (DBCS, OS, office applications, virtualization tools, programming languages and tools) | Big Data & BI |
| **Renga** | Saint-Petersburg | rengabim.com | info@rengabim.com | (812) 703-1011 | Replicated enterprise (institution) management, document of automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other) | |
| **RNDSOFT** | Rostov-on-Don | rnds.pro | es@rnds.pro | | Replicated enterprise (institution) management, document of automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other); Custom software development | Big Data & BI; Blockchain Technology; Smart City |

| Company | Head office location | Web | E-mail | Phone | Specialization | Expertise in areas corresponding to global technological trends |
|---|---|---|---|---|---|---|
| **RTC ARGUS** | Saint-Petersburg | argustelecom.ru | t.stakanova @argustelecom.ru | (921) 781-2612 | Replicated enterprise (institution) management, document of automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other) | Big Data & BI |
| **S.C.A.T** | Krasnodar | skat-vending.com | info@skat-vending.com | (918) 199-3891 | Custom software development | Artificial Intelligence |
| **SatvaSpace** | Tver | satvaspace.com | s.abdulova @satvaspace.com | (921) 655-6958 | Custom software development | Artificial Intelligence; IoT |
| **SDI SOFT** | Moscow | sdisoft.ru | info@sdisoft.ru | (499) 495-1042 | Replicated enterprise (institution) management, document of automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other) | NRI – Network Resource Inventory |
| **SearchInform** | **Moscow** | **searchinform.ru** | **info@searchinform.ru** | **(495) 721-8406** | **Information security solutions** | **Artificial Intelligence; Big Data & BI** |

SEARCHINFORM
INFORMATION SECURITY

SearchInform is a leading Russian developer of information security solutions. The company's list of products includes instruments for complex internal threats protection: SearchInform Risk Monitor, SearchInform DLP, SearchInform SIEM, SearchInform FileAuditor, SearchInform ProfileCenter and TimeInformer as well as information security services using its own products.

SearchInform products are suitable for companies of all industries, where data is stored, processed and transferred. 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, as well as by licenses from the Federal Service for Technical and Export Control of Russia.

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|---|---|---|---|---|---|---|
| **Secret Technologies** | Moscow | secretgroup.ru | info@secretgroup.ru | (495) 109-2950 | Information security solutions | |
| **SETERE** | **Saint-Petersburg** | **setere.com** | **info@setere.com** | **(812) 921-0977** | **Basic software development (DBCS, OS, office applications, virtualization tools, programming languages and tools); Custom software development** | **Blockchain Technology** |

SECURITY
TECHNOLOGY RESEARCH

SETERE (LLC "TBI") is a software development company for users of domestic operating systems based on LINUX. At the moment, the company has released two of its own products: a software package for the rapid deployment of remote workstations "ISU Terminal" and "SETERE OCR optical text recognition system".

SETERE is also engaged in import substitution projects, carries out complex deliveries of software and equipment of its partners.

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|---|---|---|---|---|---|---|
| **Sibedge** | Tomsk | sibedge.com | contacts@sibedge.com | (382) 270-1841 | Custom software development | Artificial Intelligence; IoT |

| Company | Head office location | Web | E-mail | Phone | Specialization | Expertise in areas corresponding to global technological trends |
|---|---|---|---|---|---|---|
| **SIGMA messaging** | Saint-Petersburg | sigmasms.ru | integration @sigmasms.ru | (904) 615-4608 | Content provider for A2P text and multimedia messaging | |
| **SimbirSoft** | **Ulyanovsk** | **simbirsoft.com** | **request @simbirsoft.com** | **(800) 200-9924** | **Custom software development** | **Artificial Intelligence; Big Data & BI; Blockchain Technology; IoT** |
| SimbirSoft | SimbirSoft provides custom software development and testing services. Since 2001, we have created more than 1000 IT products for business growth and development in fintech, retail, healthcare, logistics, industry, etc. We develop IT solutions for work automation, high-load systems, mobile apps, machine learning and data science systems for customers from Russia, Europe and the USA. We provide all services with our own staff of 1300 employees.<br><br>SimbirSoft is listed among the largest IT companies in Russia and in the Software 500 global rating. Growth rates and service quality are confirmed by international awards and Global Outsourcing 100, RAEX, RUSSOFT AWARD, CNews, Tadviser, and Tagline ratings. | | | | | |
| **SIMETRA** | Saint-Petersburg | simetragroup.ru | moscow @simetragroup.ru | (812) 702-1335 | Custom software development; Navigation and geographic information systems; Replicated enterprise (institution) management, document of automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other) | Smart City; Big Data & BI; Artificial Intelligence |
| **Simtech Development** | **Ulyanovsk** | **simtechdev.ru** | **sales@simtechdev.org** | **(800) 550-8510** | **Custom software development** | |
| simtech DEVELOPMENT | Simtech Development is a developer of eCom solutions for the transitioning of business to a new level of digitalization.<br><br>We have been converting sales to online for more than 17 years. Since then, we have implemented more than 5,000 projects, including the launch of highly loaded online stores and marketplaces “from scratch”, as well as modifications of existing complex eCom projects. We work with corporations, financial and trading companies, manufacturing enterprises and local businesses.<br><br>We work in the in-house development format, implementing projects by specialists of our own.<br><br>Furthermore, our operation is in accordance with the requirements of the international standard ISO 9001:2015. | | | | | |
| **SKB Kontur** | Ekaterinburg | kontur.ru | pr@skbkontur.ru | (800) 500-5080 | Replicated enterprise (institution) management, document of automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other); Basic software development (DBCS, OS, office applications, virtualization tools, programming languages and tools) | Artificial Intelligence; Big Data & BI |

| Company | Head office location | Web | E-mail | Phone | Specialization | Expertise in areas corresponding to global technological trends |
|---|---|---|---|---|---|---|
| **SkyDNS** | Ekaterinburg | skydns.ru | | (812) 385-7421 | Information security solutions | Big Data & BI |
| **Smart Analytics** | Perm | sm-analytics.com.ru | eugenia.shadrina@sm-analytics.com | (964) 190-3412 | Custom software development | Big Data & BI |
| **Smart Design** | Saint-Petersburg | smddev.com | vitaly.tishkov@smddev.com | (921) 932-7150 | Custom software development | Artificial Intelligence; Big Data & BI; IoT |
| **Smartilizer Rus** | Saint-Petersburg | smartilizer.ru | evgeny.filippov@smartilizer.ru | (921) 323-1370 | Custom software development | Artificial Intelligence |
| **SMS-Information technologies** | Samara | sms-it.ru | info@sms-it.ru | (846) 205-7900 | Replicated enterprise (institution) management, document of automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other) | IoT |
| **Soft Company** | Moscow | softwarecom.ru | info@softwarecom.ru | (495) 983-0548 | Custom software development | Big Data & BI; Blockchain Technology |
| **SoftLab-NSK** | Novosibirsk | softlab-nsk.ru | administration@softlab-nsk.com | (383) 363-0462 | Replicated enterprise (institution) management, document of automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other); Custom software development | AR & VR Development |
| **SOLVO** | Saint-Petersburg | solvo.ru | sales@solvo.ru | (812) 606-0555 | Replicated enterprise (institution) management, document of automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other) | Artificial Intelligence; Big Data & BI |
| **Sopos** | Saint-Petersburg | einsur.ru | info@einsur.ru | (812) 507-6780 | Custom software development; Tender platform; Health insurance expertise | |
| **SPC KRUG** | Penza | krug2000.ru | krug@krug2000.ru | (841) 249-9775 | Development of software and hardware complexes and industry solutions in the field of industrial automation | IoT |
| **Speech Technology Center** | Saint-Petersburg | speechpro.ru | stc-spb@speechpro.com | (812) 325-8848 | Embedded software (equipment, devices) | Artificial Intelligence; Big Data & BI; Smart City |
| **SPHAERA** | Moscow | sphaera.ru | info@sphaera.ru | (495) 672-7076 | Replicated enterprise (institution) management, document of automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other) | Big Data & BI; Smart City |

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|---|---|---|---|---|---|---|
| **SSP SOFT** | **Moscow** | **ssp-soft.com** | **sales@ssp-soft.com** | **(495) 975-9390** | **Custom software development** | |
| SSP SOFT | | SSP SOFT is a service company and a reliable IT service provider for the implementation of complex, large-scale business digital projects in banking and financial sector, retail, telecommunications, transport and logistics, power engineering and other areas.<br>The company was awaded by the «RUSSOFT AWARDS 2021» prize in the category of fast-growing service companies that have made significant progress in the field of software development and IT -services export.<br>Access to more than 1500 highly qualified specialists, high quality requirements, quick response to customer`s requests and modern management approaches allow SSP SOFT to provide services that meet international standards.<br>SSP SOFT operates in the Russian Federation, Republic of Belarus, Republic of Kazakhstan and other EAEU countries. | | | | |
| **Statanly Technologies LLC** | Saint-Petersburg | statanly.com | sergey@statanly.com | (921) 875-2396 | Custom software development | Artificial Intelligence; Big Data & BI; Smart City |
| **Supl.biz** | Tomsk | supl.biz | info@supl.biz | (800) 600-5831 | Services based on our own business platform Supl.biz | Artificial Intelligence |
| **SWDC RTSoft** | Moscow | rtsoft.ru | rtsoft@rtsoft.ru | (495) 967-1505 | Embedded software (equipment, devices); Custom software development | AR & VR Development; Artificial Intelligence; IoT; Smart City |
| **SWTECNN LLC** | Nizhny Novgorod | swtec.group | Artem.Kalachev @swtecnn.com | (960) 173-8444 | | |
| **Syncretis** | Saint-Petersburg | Syncretis.com | info@syncretis.com | (812) 611-0686 | Custom software development | Artificial Intelligence; Big Data & BI; Blockchain Technology |
| **T1** | Moscow | t1.ru | info@t1.ru | (495) 727-0985 | Custom software development; System integration; Consulting | Big Data & BI; IoT |
| **TEAM FORCE** | **Moscow** | **teamforce.ru** | **welcome @teamforce.ru** | **(495) 646-8040** | **Custom software development; Mobile applications; Website designing** | **Human capital** |
| TEAMFORCE | | TEAM FORCE is the pioneer of SmartStaffing and the leader of the TEAM FORCE Alliance, where IT teams have been strengthening each other via project-based rearrangement of required competencies since 2008. Our Alliance, as an industry partnership, is focused on solving the challenges of the largest corporate customers. | | | | |

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|---|---|---|---|---|---|---|
| **Technoservice** | Moscow | techsrv.ru | info@techsrv.ru | (499) 704-3425 | Custom software development | Big Data & BI; IoT; Smart City; AMS (Association Management Software); ESB (enterprise service bus) |
| **TERMIKA** | Moscow | olimpoks.ru | info@termika.ru | (495) 956-2101 | Replicated enterprise (institution) management, document of automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other) | |
| **TLK** | Novosibirsk | youlk.ru | info@youlk.ru | (383) 209-3430 | Replicated enterprise (institution) management, document of automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other) | Artificial Intelligence; IoT; Smart City |
| **Tract-Soft** | Saint-Petersburg | tract-soft.ru | ns@tract.ru | (812) 490-7799 | Embedded software (equipment, devices); System for broadcasting automation and planning the radio content | |
| **Transset** | Moscow | transset.ru | inform@transset.ru | (499) 649-4668 | Custom software development; Replicated enterprise (institution) management, document of automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other) | Artificial Intelligence; Big Data & BI; IoT; Smart City |
| **TRONIC** | Moscow | tronicint.ru | info@tronicint.ru | | Supply of technological solutions for the production of microelectronics and relevant IT solutions for various sectors of the economy | Big Data & BI; Smart City |
| **Unlim-Soft** | Tyumen | unlim.group/ unlim-soft | m.zemlyanoy @unlim.group | (345) 228-5052 | Custom software development | Artificial Intelligence; IoT |
| **Usetech** | Moscow | usetech.ru | info@usetech.ru | (495) 660-5048 | Custom software development | Artificial Intelligence; Big Data & BI; Blockchain Technology; IoT |

| Company | Head office location | Web | E-mail | Phone | Specialization | Expertise in areas corresponding to global technological trends |
|---|---|---|---|---|---|---|
| **Vinteo** | **Krasnodar** | **vinteo.ru** | **info@vinteo.ru** | **(800) 333-4016** | **Basic software development (DBCS, OS, office applications, virtualization tools, programming languages and tools)** | |
| Vinteo VIDEO COMMUNICATION CORE | Vinteo is a Russian producer of professional videoconferencing software and endpoints (telepresence) and a provider of video engineering services. The Vinteo products are based on the international ITU-T standards and H.323 and SIP protocols and provide the maximum compatibility with third-party videoconferencing solutions. Vinteo products are used for holding conference calls at the highest government level, organizing national programs on distance education, telemedicine, etc. The company's developments are included both in the Unified Register of Russian Software and in the official list of analogues recommended by the Russian Ministry of Digital Development, Communications and Mass Media for replacement of popular foreign video communication services. | | | | | |
| **VR Concept** | Moscow | vrconcept.net | info@vrconcept.net | (495) 212-1147 | Replicated enterprise (institution) management, document of automation, design and production process systems (ERP, CRM, ECM, EDMS, CAD, APCS and other) | AR & VR Development; Smart City |
| **Web3 Integrator** | Moscow | wavesenterprise.com | sales@wavesenterprise.com | | Custom software development | Blockchain Technology; IoT |
| **Webpractik Ltd** | Rostov-on-Don | webpractik.ru | info@webpractik.ru | (863) 303-2038 | Custom software development; Website designing | Artificial Intelligence; Big Data & BI |
| **WESMA** | Moscow | wesma.agency | manager@wesma.ru | (495) 118-2474 | Website designing | |