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Abstracts

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BMI View: We have left our forecasts for the Russian IT market unchanged in our Q1 2016 report update after undertaking multiple revisions in 2015. We made multiple downgrades in 2015 to account for the tougher economic climate, international sanctions and the steep depreciation of the rouble against the US dollar. As a result of these conditions, 2014 and 2015 saw a significant contraction in dollar terms. In 2016, we believe the market will begin to grow positively in US dollar terms after two years of massive contraction. Sanctions impact vendors asymmetrically, for instance US vendors are most likely to suffer due to reputational damage, with IT products and solutions increasingly seen through the lens of national security by both the US and the Russian government. As a result, we expect Chinese server and storage vendors to capitalise on increased demand in Russia, which could also have implications for software vendors over the medium term. We expect growth to return in local currency terms from 2016, but with a more significant acceleration from 2017 onwards as the economic environment becomes more supportive, offering some growth potential in the latter years of our forecast. There is, however, downside risk to this scenario owing to tense US-Russian relations, while political factors also present risks to vendors; for instance, data localization requirements and the government's increased strategic emphasis on achieving technological independence.

Headline Expenditure Projections

Overall IT market Value in 2016: RUB1trn (up5.2% y-o-y)

Hardware market Value in 2016: RUB490.8bn (up4.1% y-o-y)

Software Market Value in 2016: RUB203bn (up 3.7% y-o-y)

IT Services Value in 2016: RUB307.5bn (up 8% y-o-y)

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