

# Russia Information Technology Report Q2 2016

<https://marketpublishers.com/r/RE12DB762C0EN.html>

Date: April 2016

Pages: 75

Price: US\$ 1,295.00 (Single User License)

ID: RE12DB762C0EN

## Abstracts

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**BMI View:** Russian IT spending collapsed in 2015 as the economy turned downwards, with sharp rouble depreciation rapidly reducing the affordability of imported devices and solutions. The outlook is for a further, albeit slower, contraction in IT spending in 2016 as economic conditions remain challenging - before a recovery from 2017. We are however cautious about the recovery, despite the pent-up demand across the market after deferred spending in 2015-16, as we envisage little of the erosion of purchasing power to be recaptured by 2020. Russia's international relations and policy umbrella for the ICT sector generates additional uncertainty, for instance through data localisation and technological independence initiatives, though these policies are creating pockets of opportunity within the market that vendors could tap with targeted strategies. For total IT spending, we envisage a CAGR of 7.1% over 2016-2020 to a total value of RUB1.2trn.

### Latest Updates & Industry Developments

**Hardware:** RUB446.9bn in 2016 to RUB551.1bn in 2020, a compound annual growth rate (CAGR) of 5.4%. Pent-up demand from the economic crisis in 2015-2016 has potential to see spending bounce back from 2017, but a subdued economic outlook means purchasing power will remain below 2013 levels, and consequently we believe lower volumes and greater share for low-cost brands will remain characteristic of the segment.

**Software:** RUB185.2bn in 2016 to RUB242.5bn in 2020, a CAGR of 7.0%. Enterprise software investments should bounce back more fully than hardware spending, but the policy of switching to domestically produced solutions could become a bottleneck and be a drag on software spending growth.

Services: RUB280.0bn in 2016 to RUB407.0bn in 2020, a CAGR of 9.8%. Weak economic outlook and the extent of investment in datacentres since 2014 provides a positive outlook for cloud services, which we believe will drive segment outperformance, but we caution that data sovereignty and aim of technological independence could dampen performance.

## Contents

BMI Industry View

Latest Updates & Industry Developments

SWOT

IT SWOT

Industry Forecast

Latest Updates

Structural Trends

Table: Enterprise Trends - GVA By Vertical (Russia 2015-2020)

Table: IT Industry - Historical Data And Forecasts (Russia 2013-2020)

Industry Risk Reward Index

Industry Risk/Reward Index

Table: IT RRI Score Breakdown By Region, Q216

Table: Europe IT Risk/Reward Index, Q2 2016

Market Overview

Recent Developments

Hardware

Software

Cloud Computing

Services

Industry Trends And Developments

Regulatory Development

Table: IT Authorities

Competitive Landscape

International Companies

Table: Lenovo

Table: Foxconn

Table: Huawei Technologies

Local Companies

Table: Kaspersky Lab

Table: Mail.ru

Regional Overview

Demographic Forecast

Demographic Outlook

Table: Population Headline Indicators (Russia 1990-2025)

Table: Key Population Ratios (Russia 1990-2025)

Table: Urban/Rural Population & Life Expectancy (Russia 1990-2025)

Table: Population By Age Group (Russia 1990-2025)

Table: Population By Age Group % (Russia 1990-2025)

Methodology

Industry Forecast Methodology

Sources

Risk/Reward Index Methodology

Table: IT Risk/Reward Index Indicators

Table: Weighting Of Components

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