

Russia Information Technology Q3 2012

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Abstracts

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BMI View: Russian IT spending is expected to reach US\$23.3bn in 2012, up 21%, with BMI upwardly revising its forecast after the PC market reported double-digit growth in Q112. IT services vendors reported stronger demand from Russian organisations in 2011 as the market bounced back. The broader use of ICT in government and other sectors will ensure an upward market trajectory in the medium term, along with major projects in other key sectors such as banking and oil and gas, and a restructuring of the utilities sector.

Headline Expenditure Projections

Computer hardware sales: US\$10.4bn in 2011 to US\$11.9bn in 2012, +14.0% in US dollar terms. Forecast in US dollar terms was upwardly revised due to strong sales growth in Q112.

Software sales: US\$3.7bn in 2011 to US\$4.7bn in 2012, +27% in US dollar terms. Forecast in US dollar terms upwardly revised due to analyst modification but will depend on the success in bringing down illegal software use, which at around 87% is one of the world's highest.

IT Services sales: US\$5.2bn in 2011 to US\$6.6bn in 2012, +30% in US dollar terms. Forecast in US dollar terms upwardly revised due to analyst modification with value-added services such as consulting and applications development growing fast.

Russia's score was 55.1 out of 100.0. Russia ranks fifth in our latest Europe RRR table, jumping ahead of CEE peers Poland and the Czech Republic. The country ranks fifth for its Industry Rewards score, but ranks lowest for Industry Risks at 32.5.

Key Trends & Developments.

In 2012, the Russian IT market is forecast to grow by around 19%. The government has announced a push to develop a national cloud computing platform, while a modernising financial sector also provided opportunities for IT vendors. There should be continued spending growth in key IT sectors, with new projects in industries ranging from timber to banking and oil and gas.

Vendors will look to opportunities in the public sector, which has launched a number of e-government service pilots in areas ranging from universal identity cards to online fee payment.

July 1 2012 has been targeted as a deadline for the introduction of a new unified system that will streamline the provision of government services by linking federal and local agencies. About RUB490mn has been earmarked to expand a possible new open source platform in 2011-2013.

Many challenges remain, specifically for the IT sector, and further government action is needed in various areas, including the protection of intellectual property rights and the creation of a sound legal framework. The government is taking some action to address these issues, most recently establishing a working committee to look at the e-commerce legal framework, but much remains to be done.

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