

Russia Information Technology Report Q4 2015

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Abstracts

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BMI View: The short term outlook for the Russian IT market is negative, with a local currency contraction expected due to the weaker economic outlook, sanctions and sharp rouble depreciation (which is expected to result in a 40.5% contraction in US dollar terms in 2015). 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 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. Looking over the forecast period, we expect growth to return in local currency terms from 2016, but a more significant acceleration from 2017 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 due to US-Russian relations, while political factors also present risks to vendors, for instance data localization requirements and the government's increased strategic value on achieving technological independence.

Headline Expenditure Projections

Computer Hardware Sales: RUB507.6bn in 2014 to RUB471.3bn in 2015, -7.2% in local currency terms. In addition to the impact of depreciation on affordability in 2015, demand was brought forward to 2014 ahead of anticipated price increases, adding to the drag on spending.

Contents

BMI Industry View

SWOT

IT SWOT

Political

Economic

Operational Risk

Industry Forecast

Table: IT Industry - Historical Data And Forecasts (Russia 2012-2019)

Macroeconomic Forecasts

Economic Analysis

Table: RUSSIA - Private Consumption Forecasts

Table: RUSSIA - Government Consumption Forecasts

Table: RUSSIA - Fixed Capital Formation Forecasts

Table: RUSSIA - Net Exports Forecasts

Industry Risk Reward Ratings

Industry Risk Reward Index

Table: Europe IT Risk/Reward Index, Q4 2015

Market Overview

Hardware

Software

Cloud Computing

Table: Russia Cloud Vendor Developments, 2014-2015

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: Mailru

Regional Overview

Europe

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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