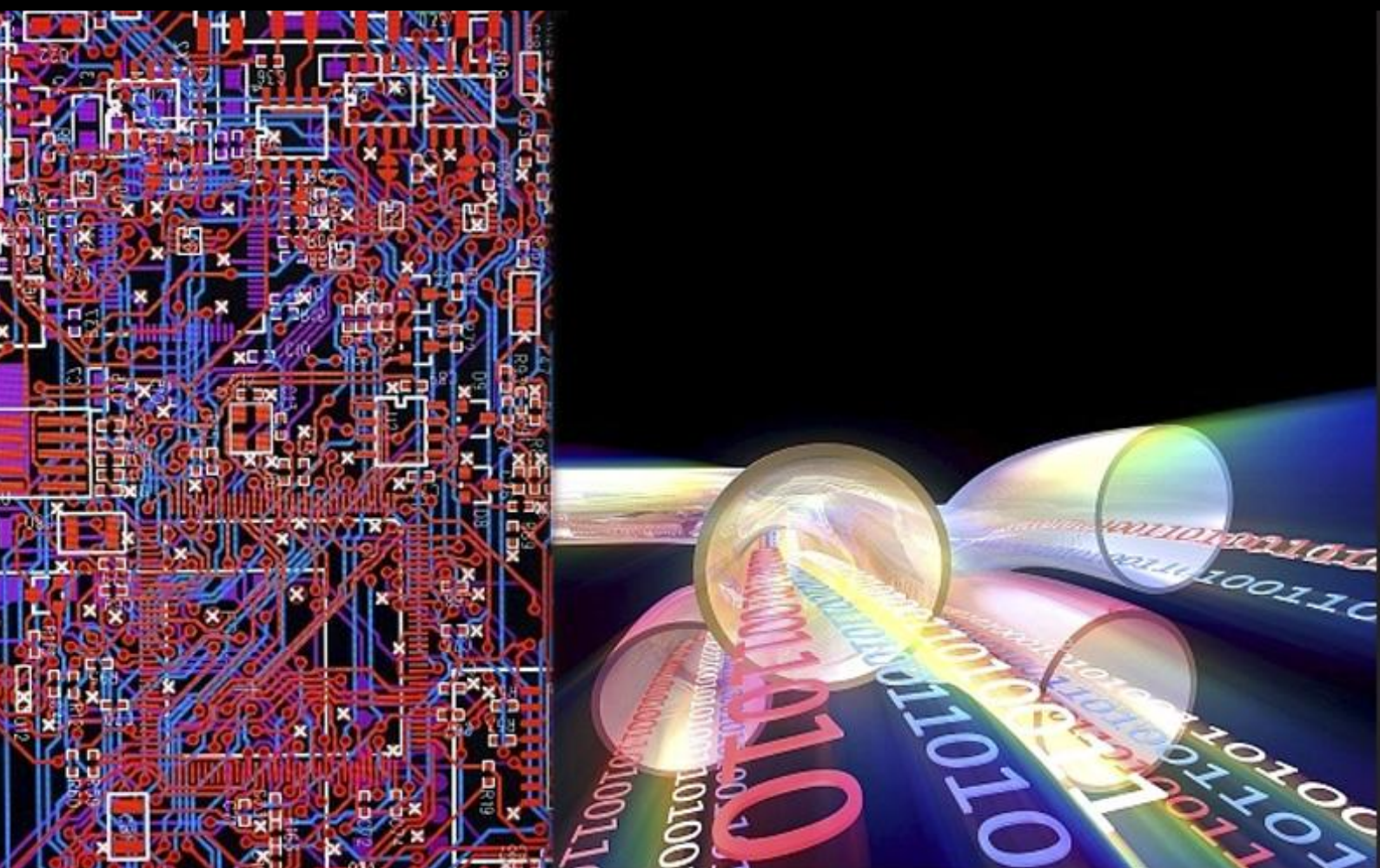




**Intesco
Research
Group**

IT SERVICES MARKET IT OUTSOURCING



MOSCOW 2014

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Profit/loss of enterprises

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Dynamics of investments into the fixed capital

Foreign foreign investments

Proceeds of enterprises

Profit/loss of enterprises

Number of employees

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Dynamics of investments into the fixed capital

Foreign foreign investments

Proceeds of enterprises

Profit/loss of enterprises

Number of employees

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Subject of research:

IT SERVICES MARKET. IT-OUTSOURCING. CLOUD SERVICES.

Goal of research:

ASSESSMENT OF SITUATION ON THE MARKET AND FORECAST OF ITS DEVELOPMENT UNTIL 2017.

Regions of research:

WORLD, RUSSIA, REGIONS OF RF

Main blocks of research:

WORLD MARKET

RUSSIAN MARKET VOLUME

DEVELOPMENT OF INFORMATION TECHNOLOGIES IN RUSSIA

REVIEW OF THE RUSSIAN IT SERVICES MARKET

TRENDS ON THE RUSSIAN MARKET

FACTORS INFLUENCING THE MARKET

STATE REGULATION OF THE MARKET

IT-SERVICES VOLUME

LARGEST COMPANIES ON IT-MARKET

IT-SERVICES EXPORT

IT-SERVICES IMPORT

CONSUMER PREFERENCES

FORECAST OF IT-SERVICES MARKET DEVELOPMENT UNTIL 2017

LARGEST SUPPLIERS OF PRODUCTS AND SERVICES

Largest Russian enterprises with the profiles:

«ABSoft»

«LUKOIL-INFORM»

«I-Techo»

«SAP CIS»

«Inline Telecom Solutions»

Production volumes, financials, balance sheets, profit and loss statements, cash flow statements, subsidiary companies and other information about main enterprises are represented.

Information sources used:

Federal State Statistics Service
Ministry of economic development of RF
Federal Customs Service
Federal Tax Service
Field expert evaluations
Materials of the field's main players
Field print and electronic publications

The research contains 82 schedules, 72 diagrams, 134 tables, 2 schemes, 1 picture

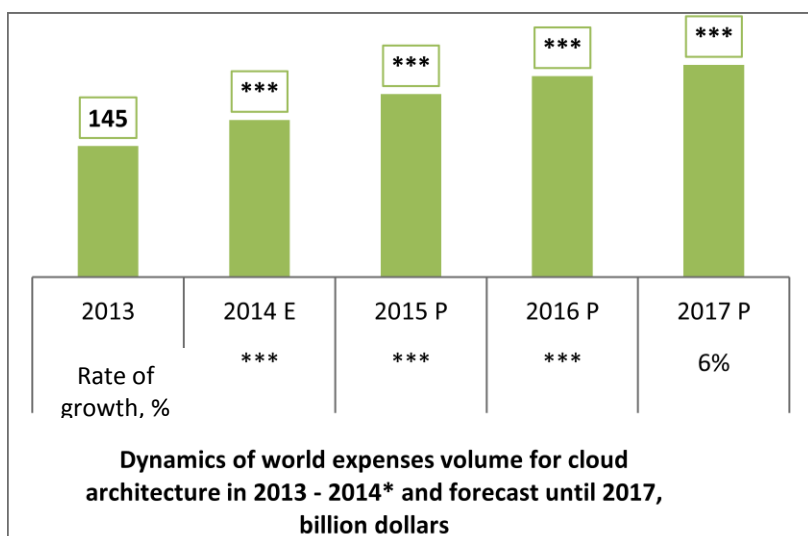
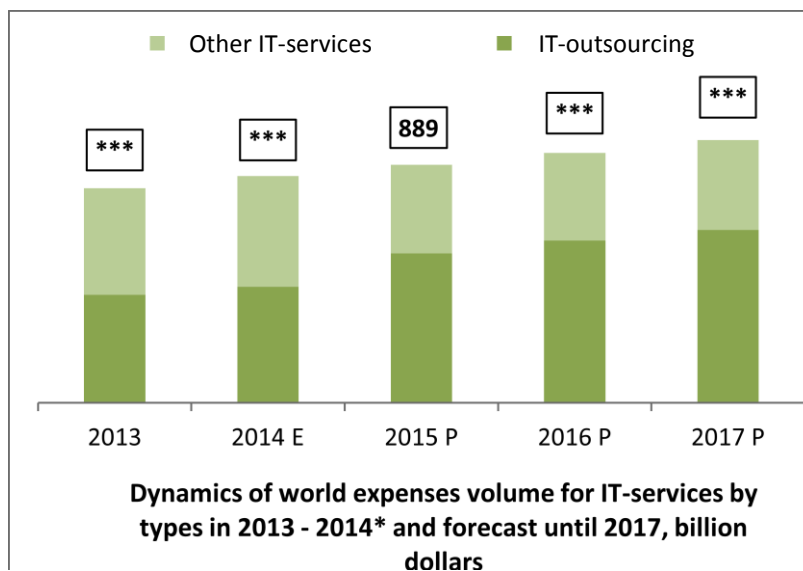
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WORLD MARKET

As for the world expenses for outsourcing, we expect that they will increase during the entire period from 2013 to 2017. In case of this in 2014 the increase will be insignificant and will make about 30 billion dollars, however since 2015 rates of growth will increase and by 2017 the share of expenses for IT outsourcing will make *** of the total amount of expenses for IT – about ** billion dollars.

At the same time not only actual volumes but the share of expenses for cloud solutions also will increase in total volume of expenses for IT from 4% in *** and *** to ***% as of the end of the period.



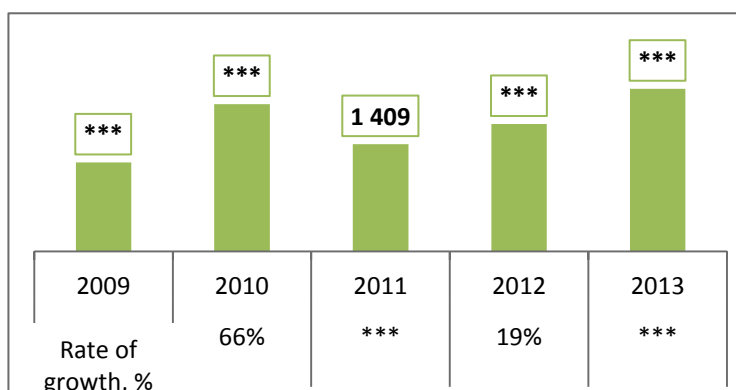
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REVIEW OF THE RUSSIAN IT SERVICES MARKET

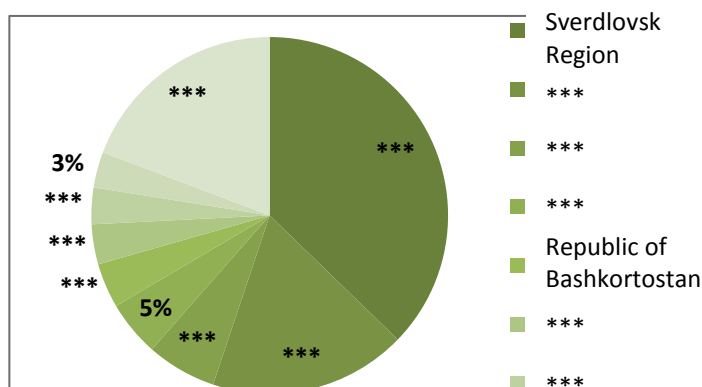
Dynamics of investments into the fixed capital by type of activity of "Software development and consultation in this field" in 2009-2013 was wavy. A high growth rate was marked in 2010 – 66% to the parameter of *** mln rubles. Further, in 2011 the decrease of ***% was marked, then two years of positive growth rates were marked. Thus, by 2013 the market reached the maximum of *** mln rubles during five years.

Sverdlovsk Region was the leading region in Russia by investments volume into the fixed capital by the type of activity of «Data processing» during 2009-2013. And if in 2013 the share of the region was equal to ***% (594,2 mln rubles), then in 2010 – 72% (*** mln rubles).

Saint Petersburg ranked *** in 2013 by the investments volume into the fixed capital, and Moscow was not included into the first *** regions. Such a situation was the result of *** and ***.



Dynamics of investments into the fixed capital by type of activity of "Software development and consultation in this field" in 2009-2013, mln rubles



Regional structure of investments into the fixed capital by the activity type of "Data processing" in 2013, %

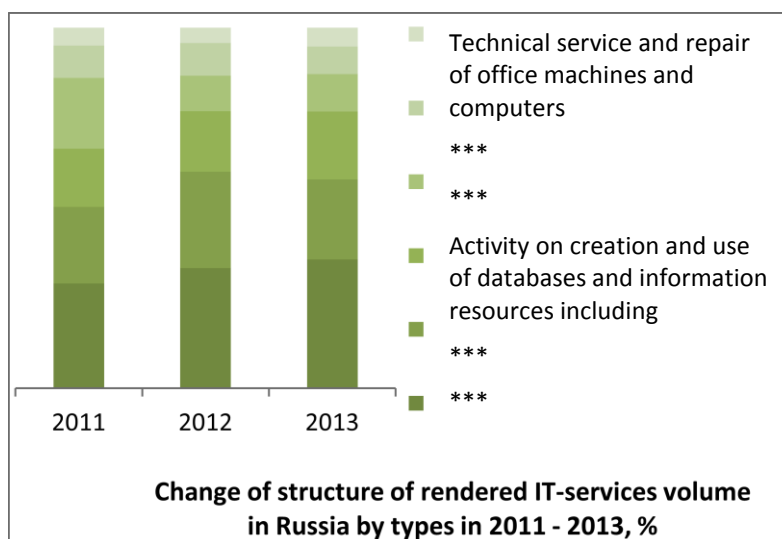
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VOLUME OF IT-SERVICES
RENDERING IN RUSSIA

Software development and consultation in this field annually increased the share in structure of the rendered IT services: from ***% in 2011 to ***% in 2012 and ***% in ***.

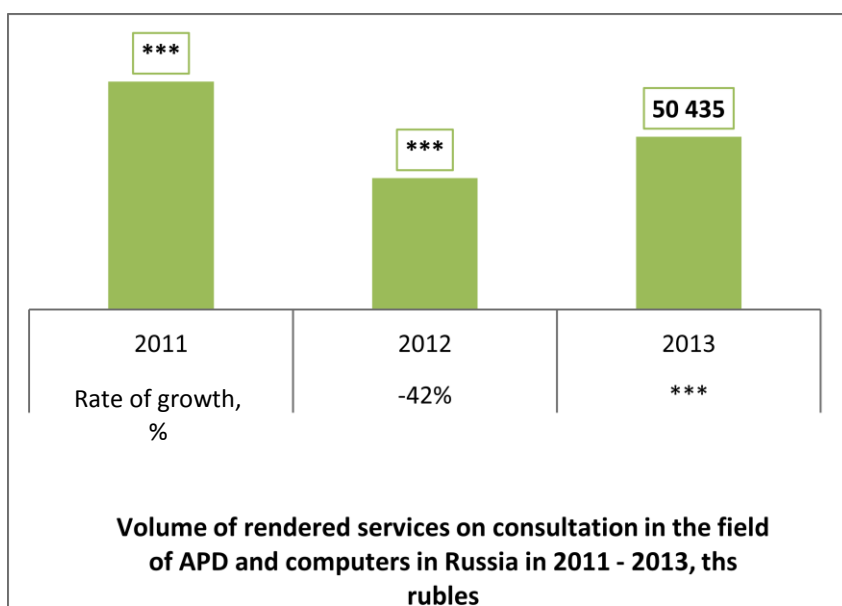
Each fifth service, rendered in 2013, in the IT sphere was connected to databases and information resources that ***% exceeds a similar parameter of 2011. The share of consulting services in the field of hardware was cut by half for the considered period – from ***% to ***%.

The maximum volume of rendered consulting services in the field of hardware on a temporal interval of 2011-2013 fell on the beginning of the period when such



services were rendered on the amount of about **,5 billion rubles then decreased by ***% followed in 2012.

However in 2013 already the parameter was partially recovered to the mark of 50,4 billion rubles. But if in 2011 the share of consultations on hardware in a total amount of rendered IT services was equal to **%, in two years this parameter reduced by ***%.



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