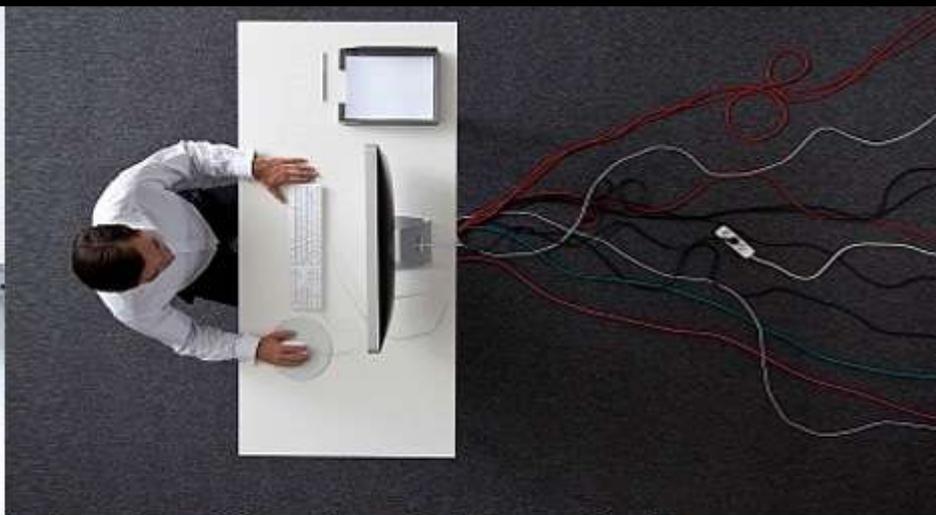


**Intesco
Research
Group**

IT-SERVICES MARKET IT-OUTSOURCING



MOSCOW 2013

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ABOUT INTESCO RESEARCH GROUP

RESEARCH METHODOLOGY

Subject of research:

RUSSIAN MARKET OF IT-SERVICES. IT-OUTSOURCING

Goal of research:

ASSESSMENT OF SITUATION ON THE MARKET AND FORECAST OF ITS DEVELOPMENT FOR 2013-2015

Regions of research:

RUSSIA

REGIONS OF RF

Main blocks of research:

WORLD MARKET

DEVELOPMENT OF INFORMATION TECHNOLOGIES IN RUSSIA

FORECAST OF DEVELOPMENT OF RUSSIAN IT-MARKET FOR 2012-2014

VOLUME OF RUSSIAN MARKET

TRENDS ON RUSSIAN MARKET

FACTORS IMPACTING ON THE MARKET

STATE REGULATION OF THE MARKET

LARGEST COMPANIES ON IT-MARKET

CONSUMERS` PREFERENCES

FORECAST OF MARKET DEVELOPMENT FOR 2013-2015

Largest Russian enterprises with the profiles made up:

«SAP of CIS»

«Microsoft Rus»

«In-line Telecom Solutions»

«I-Techo»

«Technoserv` A/C»

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

Retail sales reports

Materials of the field's main players

Field print and electronic publications

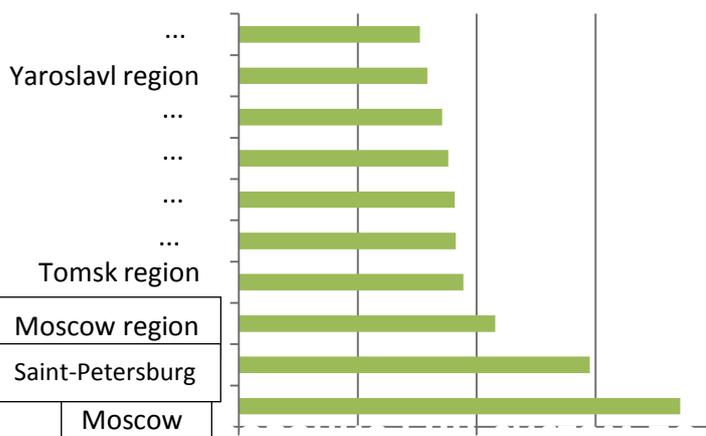
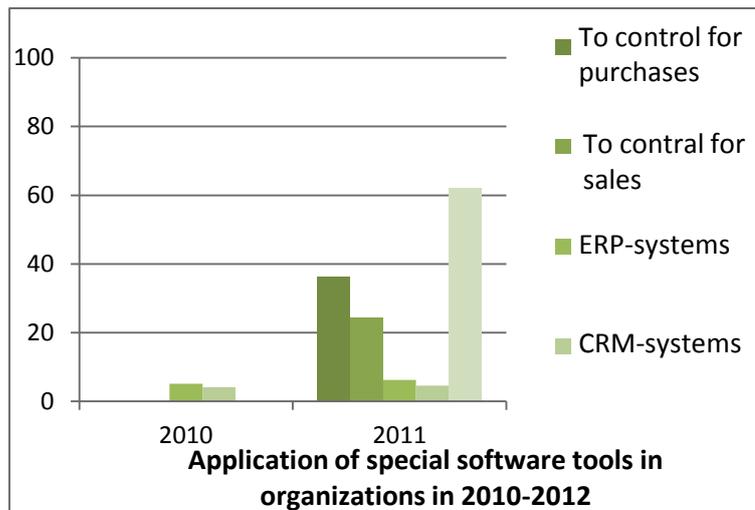
The research contains 25 schedules, 13 diagrams, 28 tables, 1 scheme.

EXTRACTS FROM RESEARCH

CHAPTER 4

DEVELOPMENT OF INFORMATION TECHNOLOGIES IN RUSSIA

Software tools controlling purchases were most popular - ***% of organizations used them, ***5 used the tools controlling sales of goods and services. Only ***% of organizations used ERP-systems that is by 1.1 p.p. more than in 2010. ***% of organizations used CRM-systems. Their share increased by 0,5 p.p. for a year.



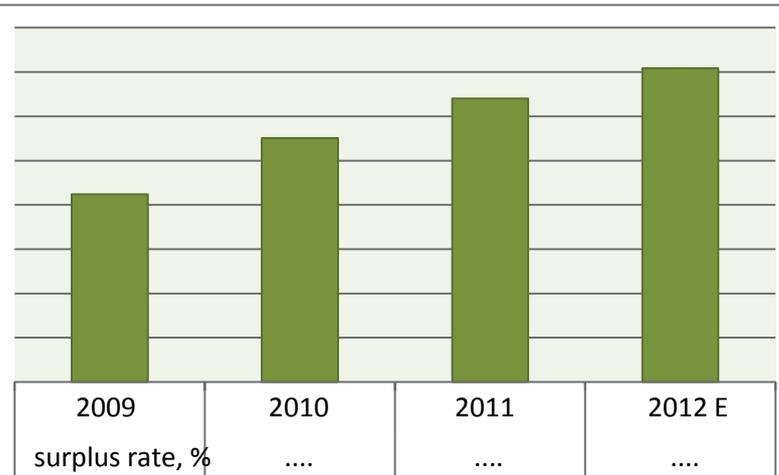
Moscow and its region, Saint-Petersburg were the leaders in application of ERP-systems with the index exceeded twice-thrice the total level around the country. The lowest value was marked in the Far Eastern regions: Tyva, Yakutia, Kamchatka territory and Chukchi autonomous area.

CHAPTER 5

VOLUME OF RUSSIAN IT-MARKET

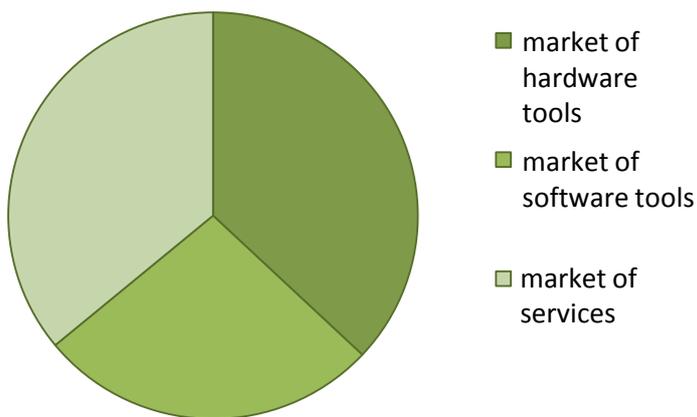
Though the Russian IT-market is far from saturation, its growth rates have been slowed down now.

As per the data of Ministry of economic development of RF, the volume of segment of IT technologies is going to amount to *** bln. rub. this year, that is higher than the results of the previous year by ***%.



Dynamics of volume of Russian IT-market in 2009-2012*, bln. rub.

As per other estimates, the volume of IT-market accounted for *** bln. dol. in 2012. The surplus for a year was about **%.



Structure of IT-market by segments in 2010, %

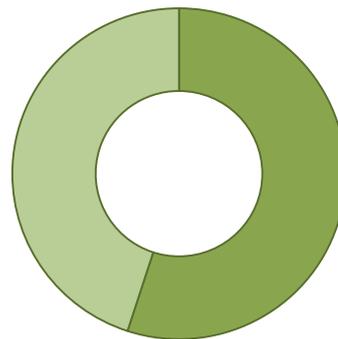
IT-outsourcing is becoming a second direction stimulating growth. Fifth part of companies, located in big cities, use it in some degree. The other fourth part of companies increased expenses on these services in 2012. First of all, the companies fight with lack of IT-specialists through outsourcing.

CHAPTER 10**CONSUMERS' PREFERENCES**

Corporate clients are the biggest consumers of IT, though the share of the private ones is also high.

Telephone network provider, oil and natural gas enterprises and financial sector are traditional consumers in this sphere. However retail networks, production companies as well as state sector are becoming clients more often. Optimization of

business processes, outsourcing, SaaS, visualization are among the products showing growth.



**Structure of IT-market by category of consumers
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ABOUT INTESCO RESEARCH GROUP

ABOUT INTESCO RESEARCH GROUP

INTESCO RESEARCH GROUP is the analytical agency, specializing in development of high-quality business plans, feasibility studies and marketing researches both on federal and regional levels of RF. We provide our clients with up-to-date and accurate information, professional recommendations for conducting business.

All works of **INTESCO RESEARCH GROUP** are based on the proven investigation methods. When conducting marketing researches and developing the business plans, the agency applies the worldwide accepted methods of investments efficiency evaluation and they are based on the Russian and international quality standards.

Analysts of **INTESCO RESEARCH GROUP** are the graduates of the leading Moscow institutions of higher education (Moscow State University, Moscow Institute of Physics and Technology, Russian Academy of Economics after Plekhanov, Higher School of Economics, State University of Economics and Finance) and have deep knowledge in marketing, methods of marketing research arrangement, investment projects efficiency evaluation, preparing the analytical reports and business-forecasting.

Professional approach and service, highly-qualified specialists, deep knowledge of various markets, broad design experience and constant improvement allow the **INTESCO RESEARCH GROUP** to provide the high-quality service to all the clients.

Information from our reports is published in the largest Russian newspapers and magazines: “Vedomosti”, “Kommersant-Dengi”, “Rossiyskaya gazeta”, “Forbes”, “Russian Food Market”, “FoodService”, “RBK daily”, “Tsenovick”, “Moe delo. Magazin”, “MAXIM”, “Odnako”, “Khlebopekarnoe proizvodstvo”, “Producty i Pribyl”, “Konditerskaya sfera/khlebopechenie”, “Unipack.Ru”, and etc.

OUR CLIENTS



**PURPOSE OF OUR COMPANY IS TO ENSURE THE SUCCESSFUL
IMPLEMENTATION OF BUSINESS PROJECTS OF OUR CLIENTS**

E-mail: info@i-plan.ru

Web-site: www.i-plan.ru

Tel.: +7 (495) 645-97-22