

# НП РУССОФТ

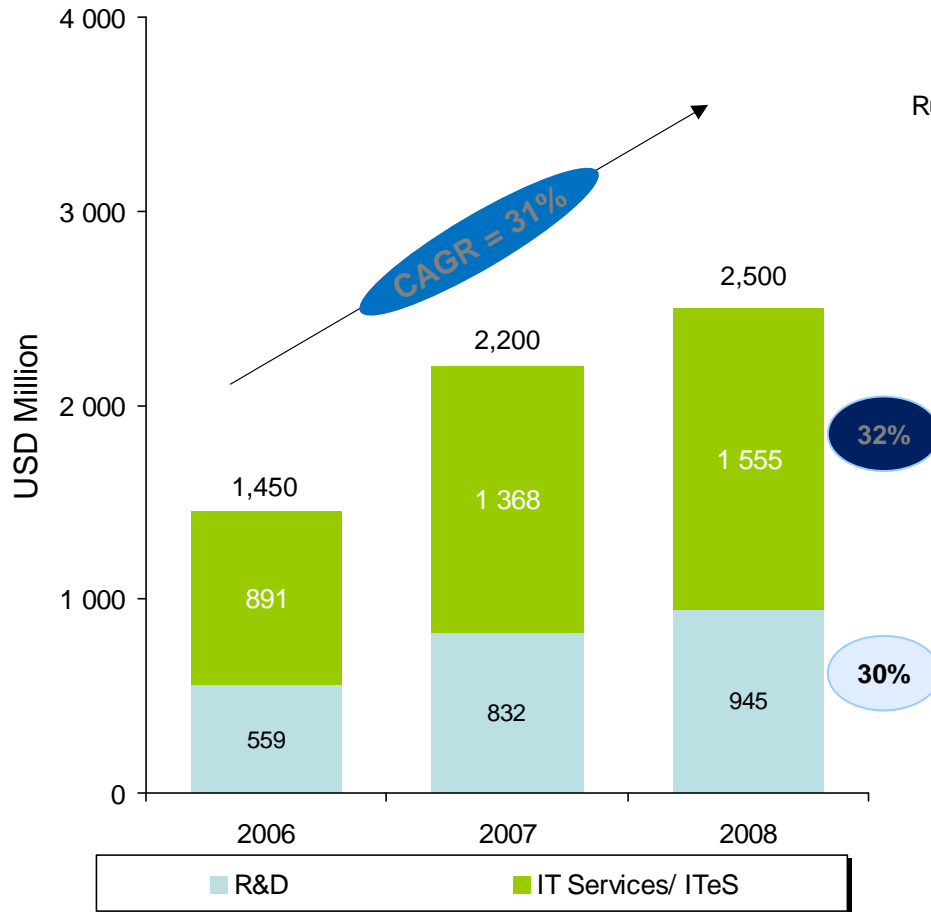
## Отчет о работе в 2008/2009 и план работы на 2009/2010

Общее собрание НП РУССОФТ.  
10 июня 2009 года.

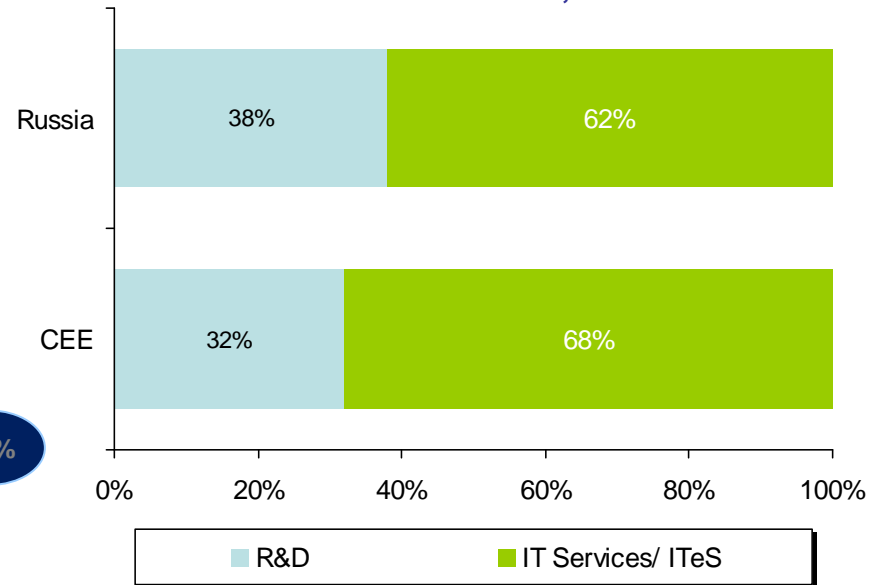
Гостиница «Астория», Санкт-Петербург

# Russian IT offshoring market has grown rapidly over the last 2 years with growth rates being highest across the globe

Russia Offshoring<sup>1</sup> Market, 2006-08



IT Offshoring Market Split by Activity Based on Size, 2008

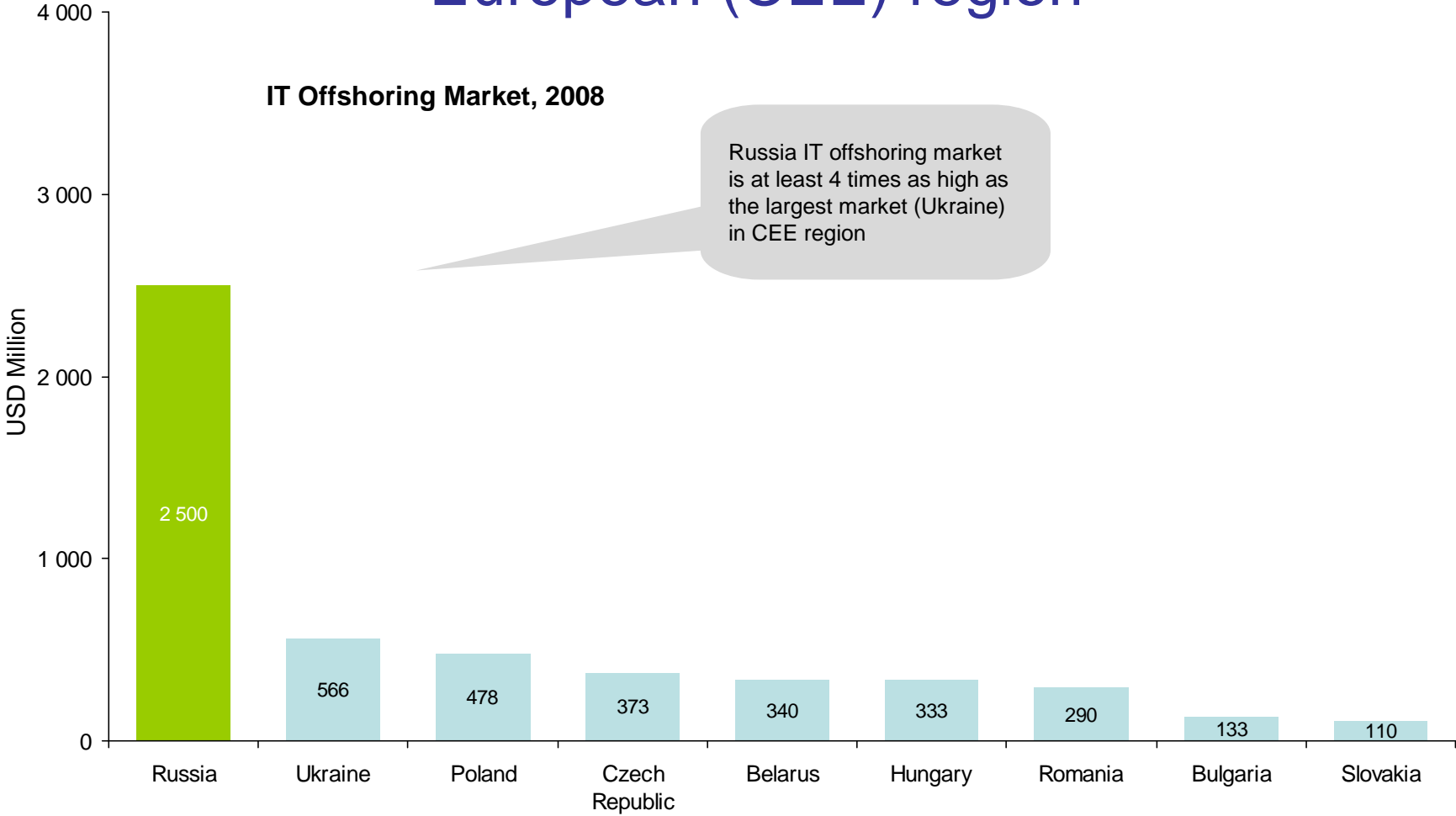


The high R&D activity can be attributed to the fact that the talent in Russia is highly capable of performing new product development and similar high-end activities due to the prevalent advanced education system

Note: <sup>1</sup>Offshoring Market includes Export of Software and IT Services; CEE = Central and Eastern Europe

Source: Russoft; IT Ukraine; PMR Publications; Primary interviews with key stakeholders with leading service providers in Russia; Zinnov Analysis

# Russia has evolved as the largest market for IT offshoring as compared to Central and Eastern European (CEE) region



Source: IT Ukraine,; Russoft; PMR Publicaitons; Primary interviews with key stakeholders with leading service providers; **Zinnov Analysis**

# The Best 100 Global Service Providers in 2009

## Among 100 best IT-service providers

- EPAM Systems (Belarus-Russia)
- Exigen Services
- IBA (Belarus)
- Luxoft
- Mera NN
- Reksoft
- Intetics (Ukraine)
- Itransition (Belarus)

## Ten best IT-service providers in CEE

1. Luxoft
2. EPAM Systems
3. Exigen Services
4. IBA
5. Reksoft
6. MERA Networks
8. DataArt
10. Auriga

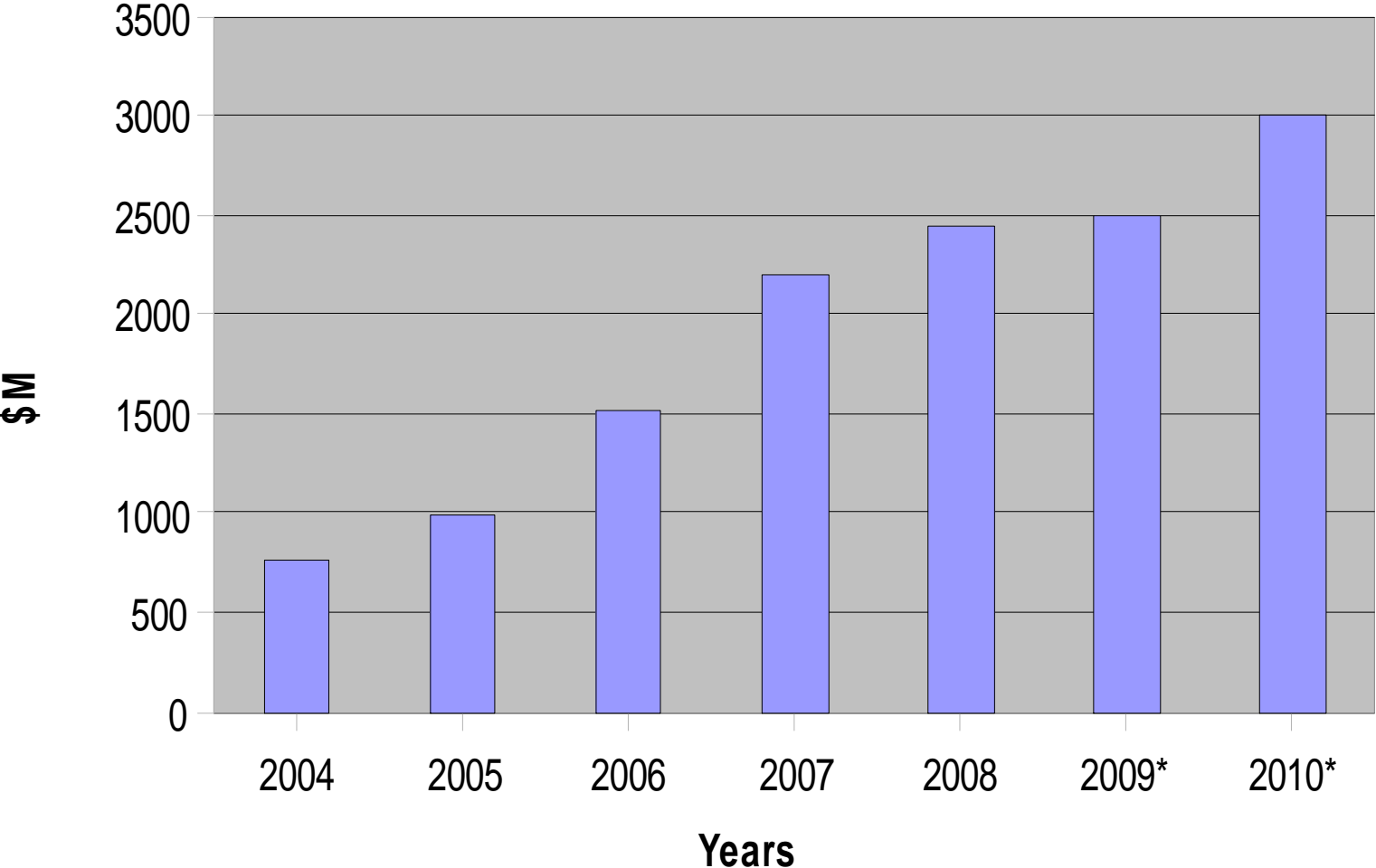


## Ten best Global Product development services' providers

Exigen Services, EPAM Systems, Luxoft, Auriga, MERA Networks

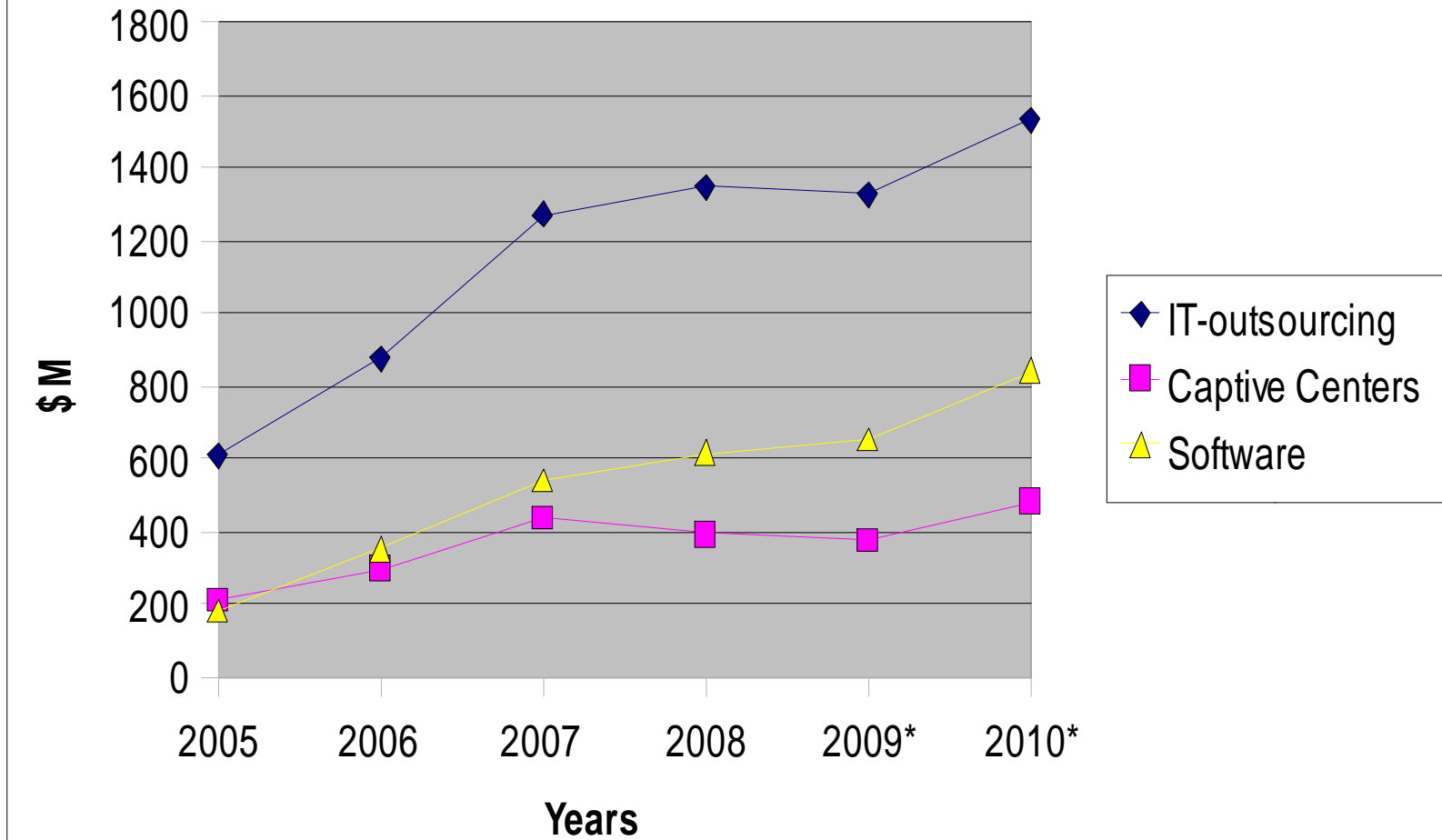
Global Services&NeoIT, 2009

# Export of Software and IT-services



RUSSOFT annual market study,  
2009, preliminary data

## Composition of Software and IT-services Export



RUSSOFT annual market study,  
2009, preliminary data

# Основные тенденции рынка

- Рост внутреннего рынка - 44% (71% в 2008)
- Рост экспорта - 19% (56%)
- Рост в области ИТ-аутсорсинга 34% (30%)
- Увеличение прямых продаж через Интернет - 27% (31%)
- Консолидация рынка (слияние, поглощения, создание холдингов) - 21% (61%)
- Увеличение доли продуктовых разработок (Box/Licensed Software) - 21% (32%)
- Рост в области разработки и внедрения программных решений (Services & Solutions) - 18% (50%)
- Увеличение доли разработок на заказ (Custom Software Development) - 14% (38%)
- Внедрение систем управления качеством - 10% (38%)