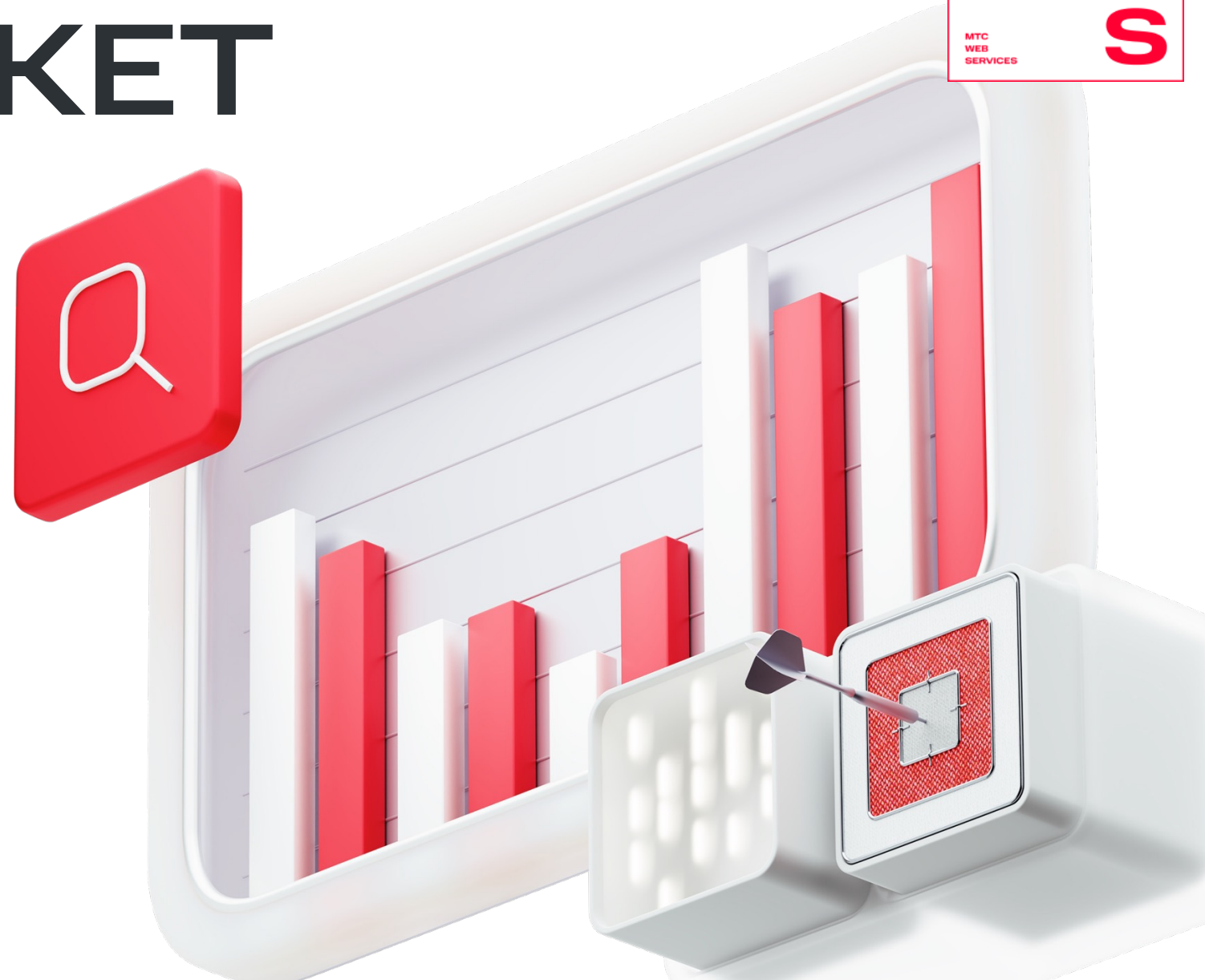


PERSPECTIVES OF IT MARKET



Perspectives of IT MARKET

The study was prepared
by MWS Cloud Intelligence Team

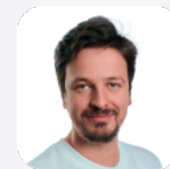
Please send your questions, comments on this
study or your ideas for collaboration to:
Intelligence_team@mts.ru



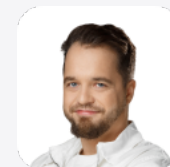
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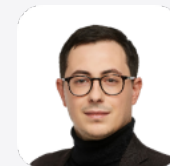
Experts



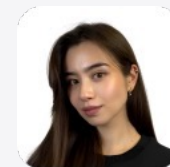
Igor Zarubinsky
MWS Executive Director,
CEO MWS Cloud



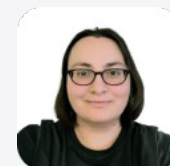
Danila Egorov
MWS Cloud
Director of Business Strategy



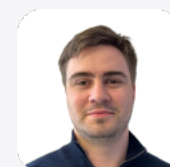
Aleksandr Osipov
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Introduction

“Perspectives of the IT MARKET” of MWS Cloud is the second edition, continuing systematic work on quantitative assessment and analysis of Russian IT MARKET. The first edition laid the foundation for a unified, coherent insight of the industry and demonstrated strong interest from market participants and experts. The new edition expands on this foundation and makes it possible to compare the dynamics, year-over-year changes, and more accurately assess the long-term trends.

The key objective of the study is to obtain the most accurate data on the size of the Russian IT market in monetary terms, as well as on the market structure. To achieve this, we at MWS Cloud use a unified assessment methodology and a detailed taxonomy of the IT market, which makes the figures comparable over time and convenient for practical application: from the industry-wide level to individual niches.

The “Perspectives of IT MARKET” study is used as a reference point in developing and adjusting strategy. The study data and findings help IT companies and their clients calibrate their product portfolios, identify priority areas, assess the potential of new segments, identify growth points, and measure the impact of decisions already made.



Igor Zarubinsky

Executive Director
MWS, CEO MWS Cloud

At the same time, the study remains a significant news source for the entire IT community: the results shape the agenda for discussions about the future of the Russian IT industry, serve as the basis for analytical materials and industry specific events, and support dialogue between technology providers and customers. The study serves both as an impactful industry-wide project and as a practical tool for those developing strategy and seeking new sources of business growth in IT.

In the current study, the IT market taxonomy was updated: some segments were redistributed and clarified, which makes a direct comparison of the volumes of some segments with last year’s data correct to a limited extent. At the same time, the top-level division of the market into the verticals of Software, Hardware, and IT Services has been maintained, so their shares remain comparable to the previous year. As before, the software vertical dominates the market, and its share of the IT market structure continues to increase year-over-year.



Stages of report generation

01 Formation of a scope of IT Market participants based on the following:

- Industry specific ratings
- Information-analytical systems
- Register of Russian software

1 200+

companies in scope

02 Identifying revenue from 1,200+ IT market participants and distributing it across a pre-developed IT market structure based on three verticals:

Software

Hardware

IT services

55%

of diversified companies

(Present in several segments of the IT market)

03 Calculating the volumes of verticals and segments of the IT market based on distributed revenue

RUB 3.9 trillion

The Russian IT market in 2025

04 Preparing a forecast for the volume of the entire IT market up to 2030 and the volumes of verticals and segments of the IT market up to 2026

> RUB 6.7 trillion

The Russian IT market in 2030

05 Calculation of the volume of the captive IT market*. Captive IT market companies were divided into:

- Hybrid captive IT companies whose revenues shape both the “classic” IT market and the captive IT market
- Fully captive IT companies whose revenue was included only in the captive IT market (off-market revenue)

RUB 1.9 trillion

The Russian Captive IT market in 2025

Markets of digital economy

The IT market is developing not only due to the growth of IT companies themselves

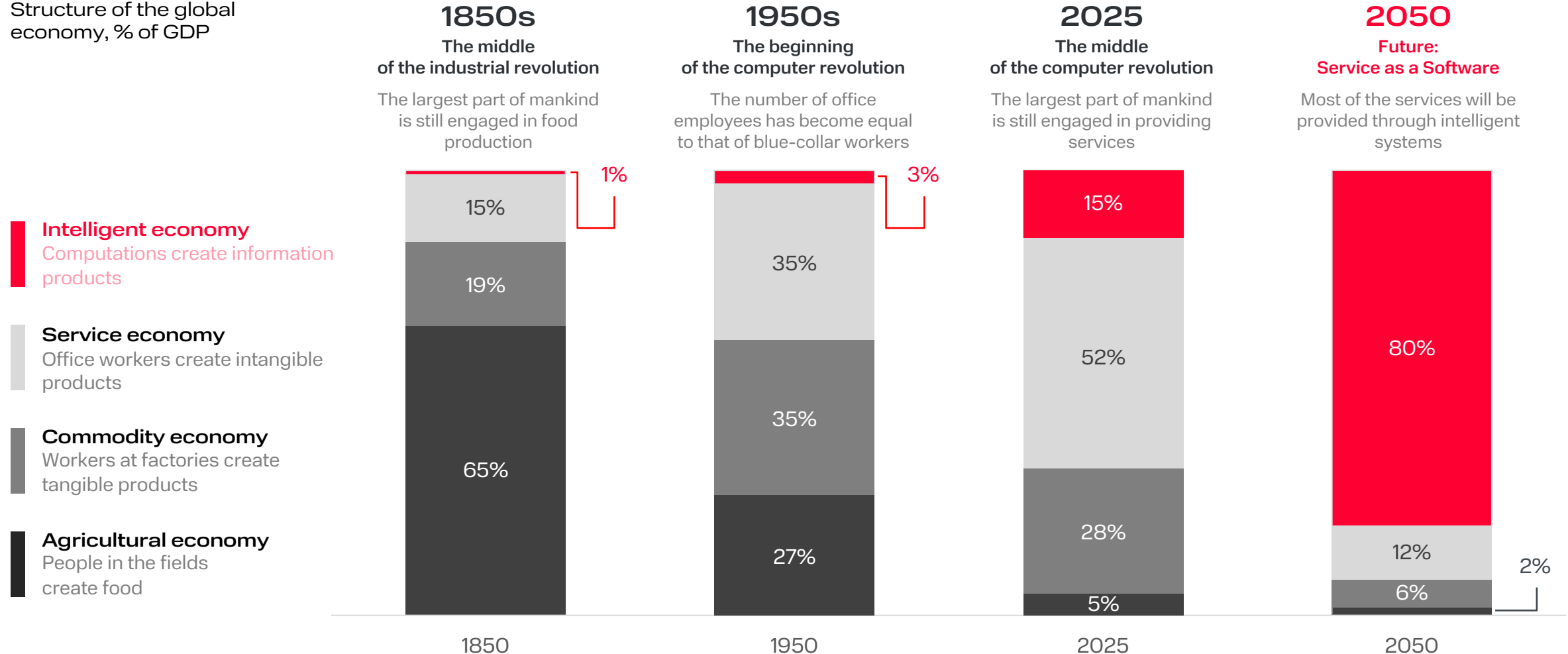
The digital transformation of the economics leads to the introduction of digital technologies in all markets. For a number of companies, digital products are becoming the core of their business, and these companies are entering technology markets. Companies, having seen the benefits of digital transformation, may establish their own captive IT companies, whose activities may be aimed at commercializing internal developments or developing products in other IT markets. An analysis of global processes of development of digital economy markets is presented in this section.

In this section we cover the following issues:

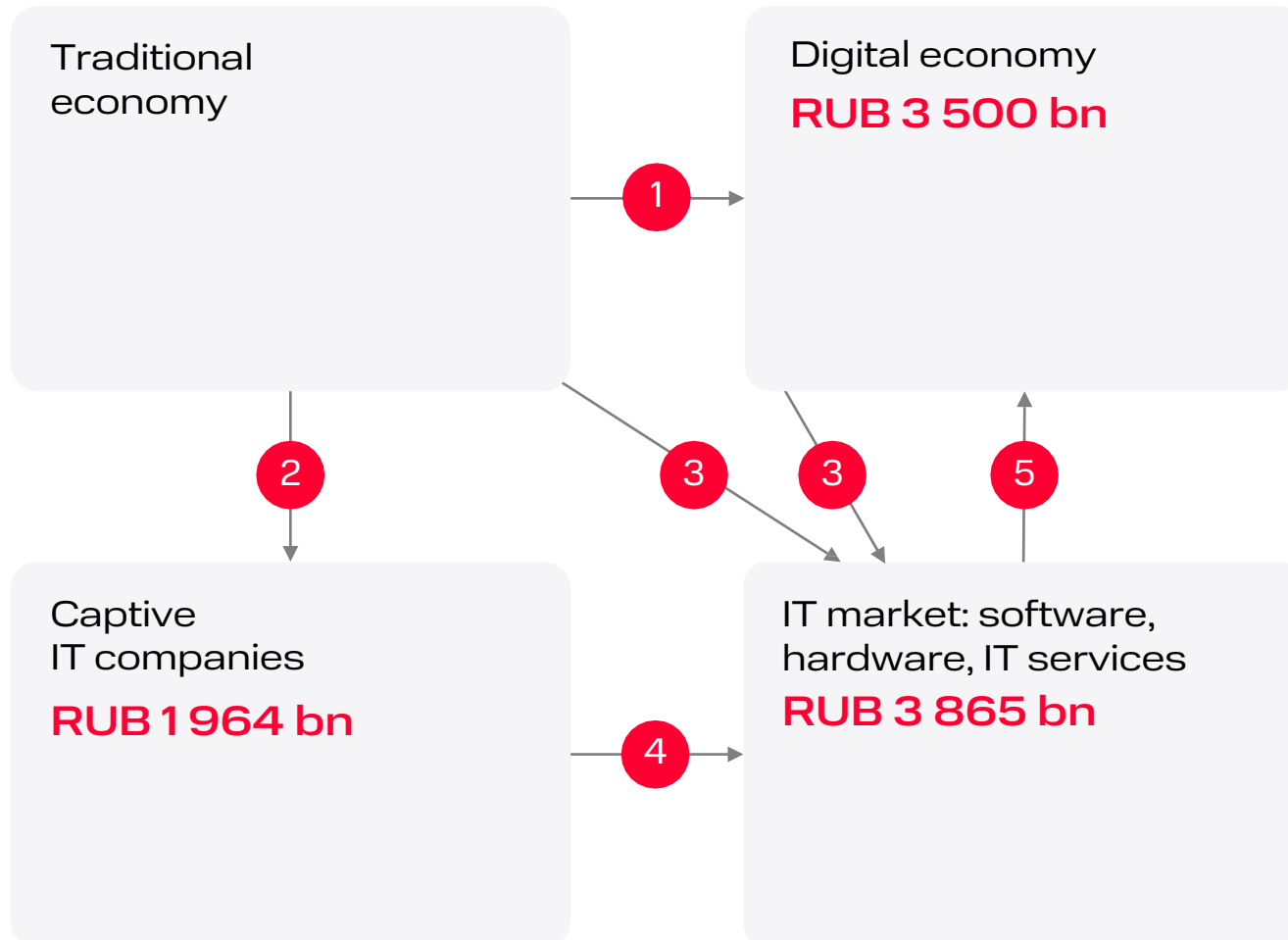
- ↳ The size and structure of the digital economy
- ↳ Analysis of captive companies

Vision: We are in the middle of a computer revolution, and within the next 25 years the intelligent economy in the form of Service as a Software will become dominant

Structure of the global economy, % of GDP



Structural trends: money flows from the traditional economy into digital and IT markets

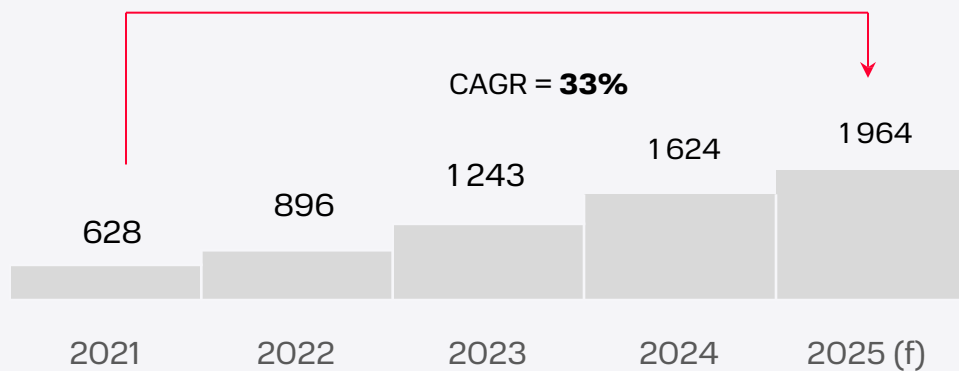


- 1 The digital economy is replacing the traditional one**
E-commerce is replacing retail, Fintech is replacing banking services, people are watching more and more streaming instead of television – the digital economy is growing against the traditional one
- 2 More and more budgets for captive companies**
Companies have transferred RUB 1.9 trillion to their captives and are continuing to grow: budgets are increasing
- 3 The IT market is growing**
IT costs are rising in both traditional and digital companies – the IT market continues to grow
- 4 Captives are being commercialized**
Captives that have developed successful IT products are striving to enter the IT market and commercialize their products. 21% of captive revenue in 2025 has already been converted into commercial revenue
- 5 IT companies are seeking to enter the digital market**
Individual IT companies are seeking to enter the end-user market, and money from the IT market will flow into the digital economy market

Russian phenomenon: captive company market – RUB 1,9 trillion

The market is growing due to import substitution, the departure of foreign vendors, and the transfer of IT budgets within companies. The focus is shifting to where the struggle for the client is decisive: i.e., to finance (36% of the market, over RUB 580 bn in 2024) and retail – companies are actively developing their own “IT factories” and platforms

Captive companies market size in 2021–2025 (f), RUB bn



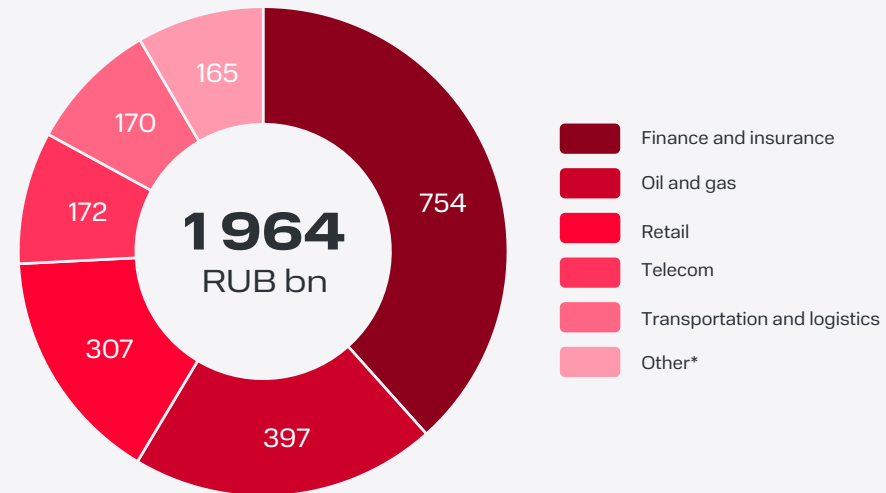
~17%

of captives play “on the clear market”: they develop a brand and live off external revenue – this is the upper level of maturity

~32%

of captives carry a large internal load, but are increasingly taking on external projects, gradually transforming from an internal IT center into an independent market player

Size of parent companies’ industries within the volume of the captive IT market in 2025 (f), RUB bn



* Other: mining, metallurgy and chemical industries, entertainment and media, manufacturing and mechanical engineering, agricultural and industrial complex, healthcare and pharmaceuticals, science and education

Russian and global IT- markets

Our analytics are based on the principle of mandatory data cross-validation. We use the global IT market as a key benchmark for the Russian IT market, viewing it as a standard. This approach makes it possible to examine how best global practices, technologies, and business models shape the global IT agenda

In this section we cover the following issues:

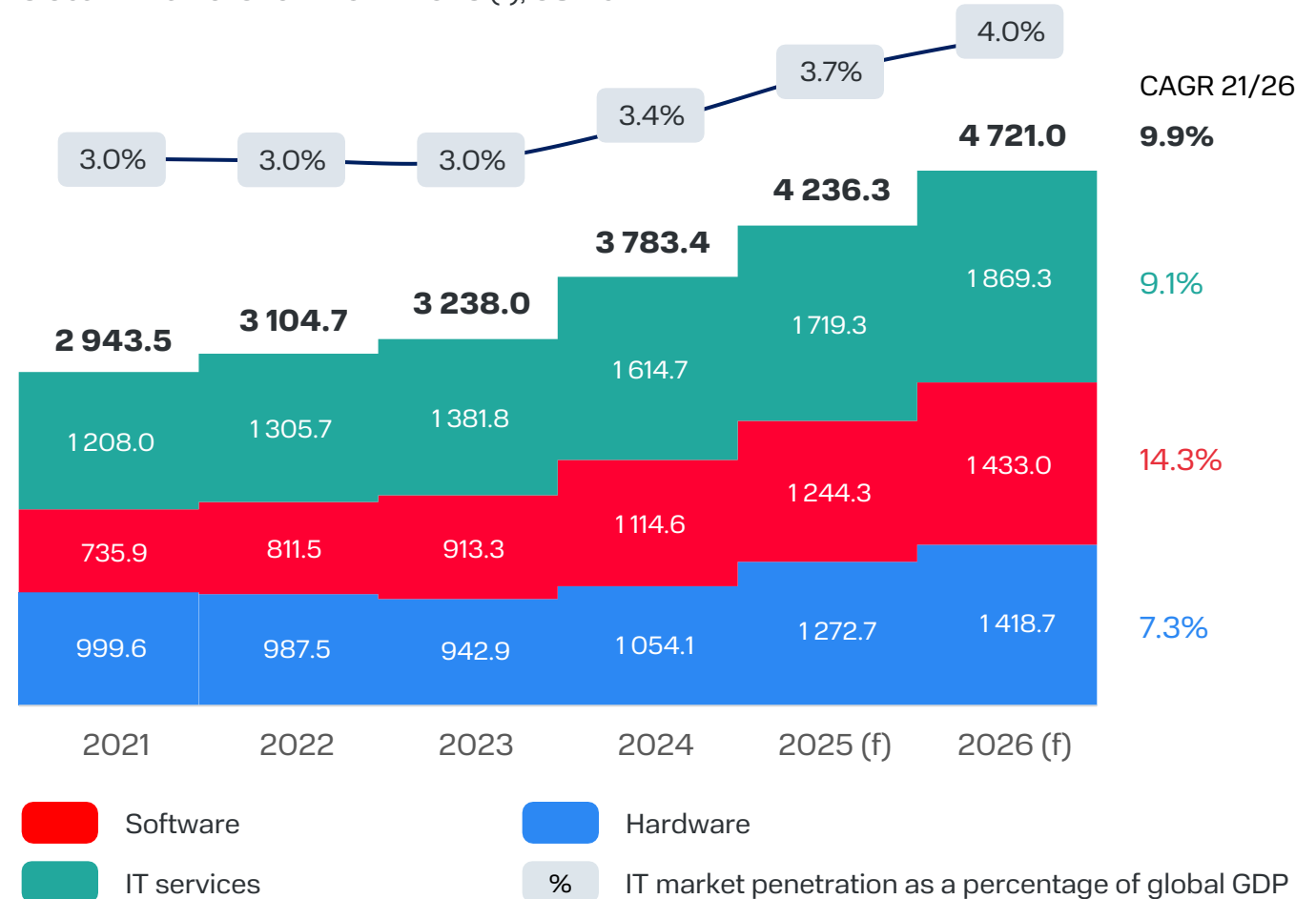
- ↳ [Global IT market](#)
- ↳ [Russian IT market](#)



“IT eats the world”: penetration into the global economy has accelerated sharply

- IT is growing faster than other sectors of the global economy. The above means that an increasing share of global GDP is being redistributed towards the technology industry – “IT eats the world”
- Since 2023, we have seen a sharp increase in the penetration of the global IT market as a share of GDP. 2023 was the year when AI will began to rapidly penetrate the economy. Coincidence?
- The Software Segment is the main driver: its contribution to the market structure is steadily increasing by an average of 1,6 percentage points annually – “soft eats IT”
- AI affects not only software, but also hardware – AI equipment (GPUs and HPC servers) is growing, and AI data centers are being built
- IT services – professional services, integration and custom development – continue to grow in absolute terms, but due to higher growth rates of software and hardware, their share of the market structure is decreasing

Global IT market size in 2021–2026 (f), USD bn

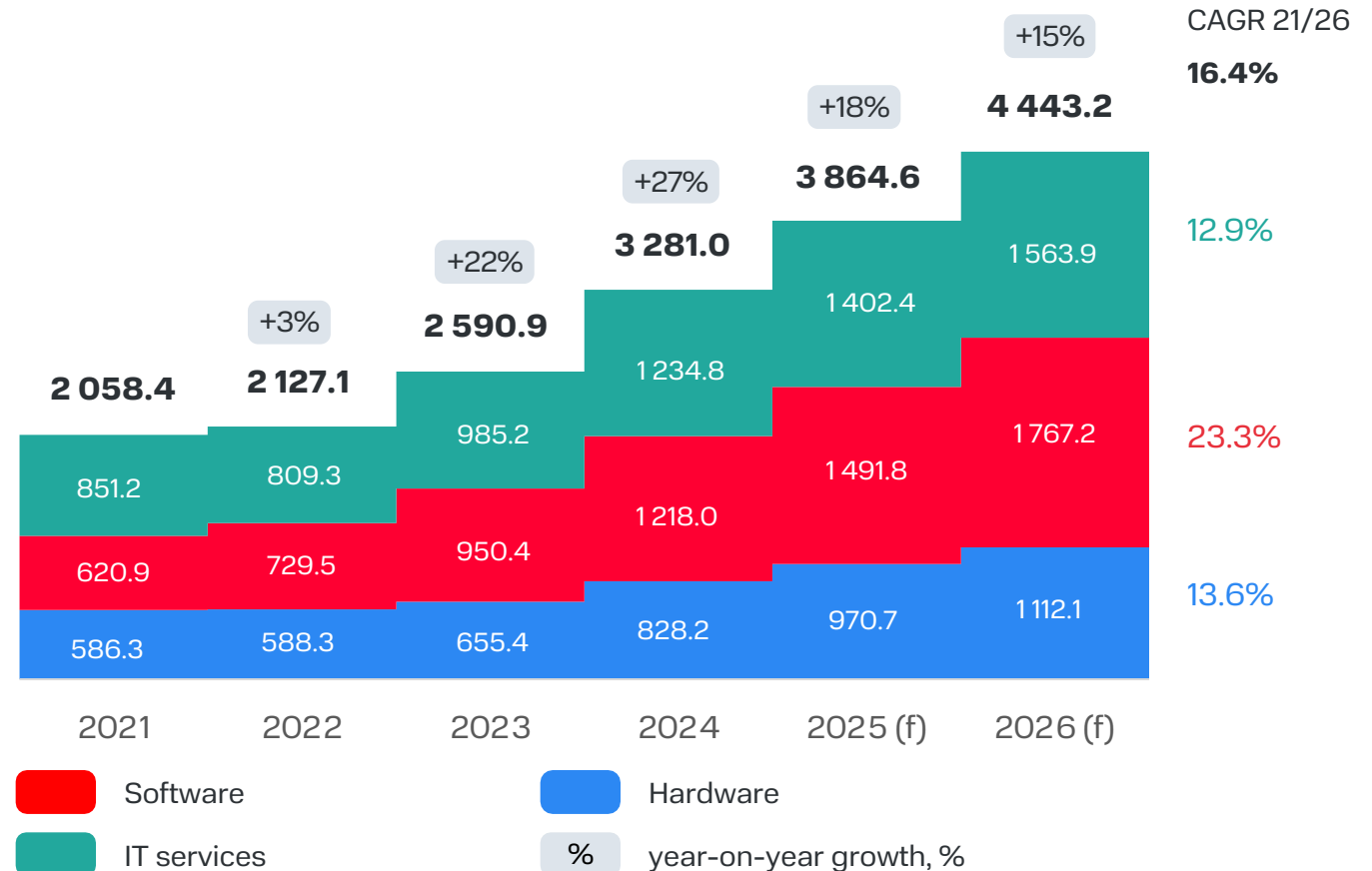


Estimated size of the global IT market: Gartner. The hardware segment was obtained by summing the Data Center Systems and Devices segments. The Communications Services segment was not taken into account

Technology oriented Russia: IT is the fastest growing industry, doubling the market in 5 years

- Russia is following the global trend of accelerated IT penetration into GDP; the fastest growing industry in Russia is technology
- After 2022, affected by the departure of foreign participants, the Russian IT market quickly recovered, and in 2023–2024 it grew at an accelerated rate of over 22%. The drivers were import substitution, as well as a sharp increase in investment in fixed assets – by 76%, 70% and 45% year-on-year in 2022–2024.*
- In 2025–2026, the market is expected to maintain positive dynamics, but growth rates are estimated to slow down compared to the record levels of previous years as the investment cycle normalizes and the Central Bank of Russia tightens its monetary policy

The volume of the Russian IT market in 2021–2026 (f) RUB bn

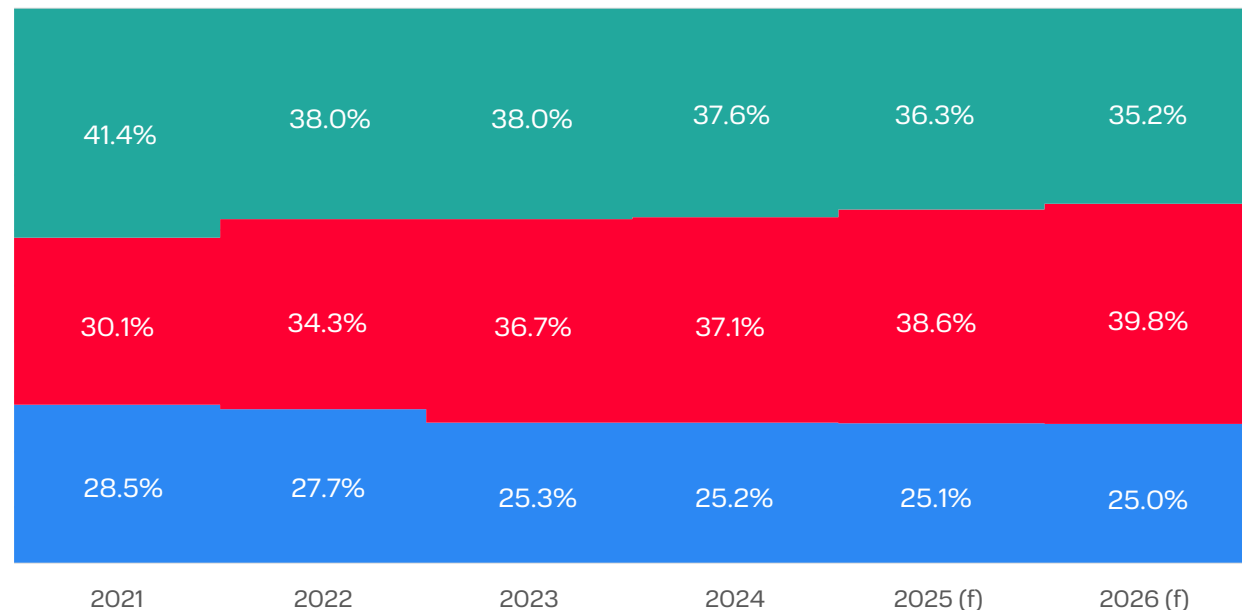


*Based on materials from the HSE “IT Industry: Key Development Indicators for 2019–2024”:
<https://issek.hse.ru/news/1047754209.html?ysclid=mj8jtl7uk4795016168>

We have learned to develop software: the share of software in the market structure will grow from 30% in 2021 to 40% in 2026

In the structure of the Russian IT market, software is the largest segment and its share continues to grow due to two factors

Dynamics of the Russian IT market structure in 2021/26 by verticals



5.9 p.p.

Software “eats IT services”

A shift towards **platform solutions** – ecosystem software increasingly consolidates features and functionality previously implemented through professional services and system integration

3.5 p.p.

Software “eats hardware”

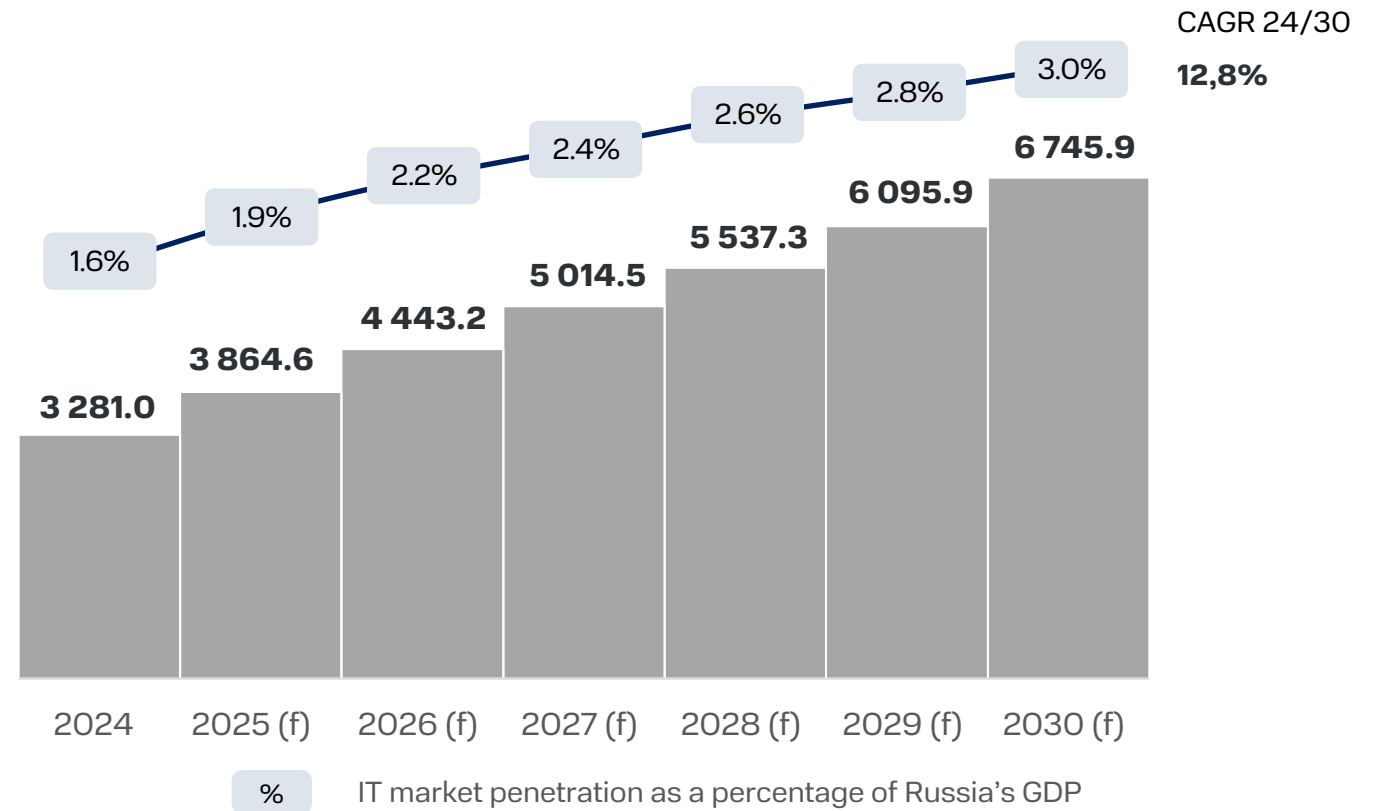
Budgets are being reallocated from hardware purchases to cloud services purchases. Migration to the cloud reduces capital expenditures and makes it possible to switch to more flexible and scalable infrastructure consumption models



Nothing can stop us: in the next 5 years, IT will grow by 106% and exceed RUB 6,7 trillion

- The market will grow by 106% by 2030: IT will grow at a rate higher than inflation, with its share in GDP increasing up to ~3%.
- The rate is affecting: the dynamics will slow down compared to previous years against the backdrop of tight monetary policy in 2024–2025
- Since 2028, as the inflation target is reached and the Central Bank transitions to a softer monetary policy, the IT market is likely to transit to an accelerated growth trajectory in the range of 10–12% year-on-year with a higher base
- Software and the accelerated implementation of AI in the country’s economy will remain the main growth drivers

The size of the Russian IT market and its penetration from the country's GDP in 2024-2030 (f) RUB bn



The penetration is calculated according to the forecast of the dynamics of Russia's GDP within the framework of the Central Bank's baseline scenario, according to "The principal directions of the unified state monetary policy for 2026 and the period of 2027 and 2028"

Assessment of verticals and segments of the Russian IT market

This section is the core component of the study

It presents a detailed and structured assessment of verticals and key segments of the IT market, revealing their current state and development dynamics and role in the overall market architecture

In this section we cover the following issues:

- ↳ Table with the assessment of verticals and segments of level -1 2021–2026 (f)
- ↳ Software
- ↳ Hardware
- ↳ IT services



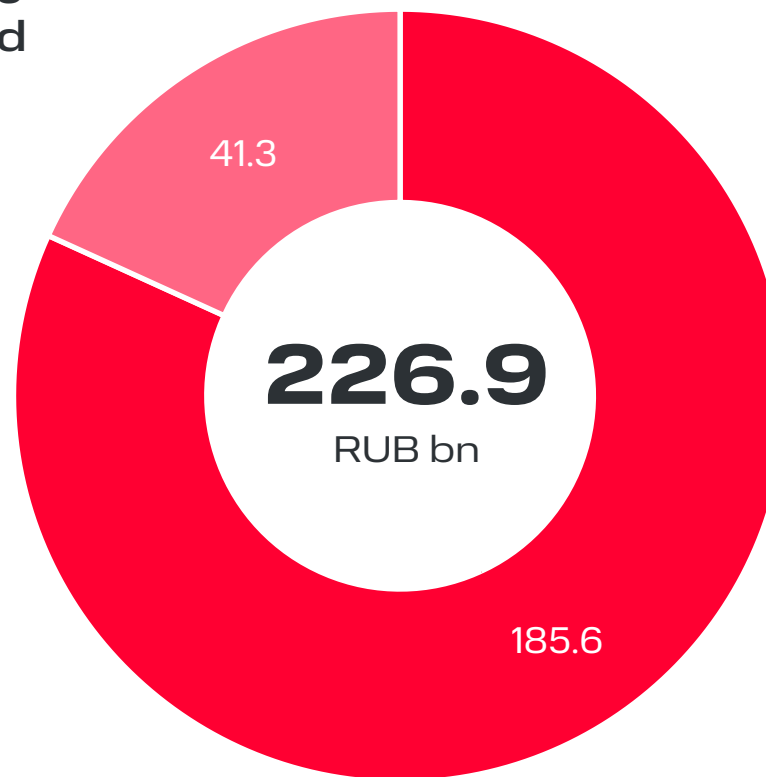
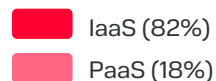
Size and dynamics of IT market verticals and lower-level segments from 2021 to 2026

	2021	2022	2023	2024	2025 (f)	2026 (f)	CAGR 21-26	Δ 2024/25, %	Δ 2025/26, %
IT Market, RUB bn	2 058.4	2 127.1	2 590.9	3 281.0	3 864.6	4 443.2	16.4%	17.8%	13.1%
Software, RUB bn	620.9	729.5	950.4	1 218.0	1 491.8	1 767.2	23.3%	22.5%	18.5%
<u>Cloud</u>	66.4	94.2	116.3	166.0	226.9	280.0	33.4%	36.7%	23.4%
<u>ERP, bookkeeping and accounting</u>	123.0	116.1	131.3	155.5	173.6	189.8	9.1%	11.6%	9.4%
<u>Information security</u>	50.3	70.5	106.1	130.6	146.3	160.9	26.2%	12.0%	10.0%
<u>Data management</u>	65.0	73.2	94.0	125.8	156.9	189.8	23.9%	24.8%	21.0%
<u>Collaboration with customers</u>	45.1	52.1	77.1	123.0	155.7	187.4	33.0%	26.6%	20.4%
<u>Platform software</u>	72.6	77.1	95.5	122.5	142.6	163.1	17.6%	16.5%	14.4%
<u>Business management</u>	44.6	53.6	69.1	85.5	106.2	128.6	23.6%	24.1%	21.1%
<u>AI technologies</u>	21.2	28.0	34.7	45.0	60.8	83.2	31.4%	35.1%	36.8%
<u>Productivity</u>	36.6	48.4	60.5	79.4	100.4	124.1	27.7%	26.4%	23.7%
<u>Software for manufacturing industry</u>	34.4	42.9	67.3	63.9	76.2	88.2	20.7%	19.2%	15.8%
<u>Payment systems</u>	27.0	34.2	46.0	57.3	70.1	84.4	25.6%	22.3%	20.4%
<u>Personnel and knowledge management systems</u>	34.8	39.2	52.6	63.5	76.1	87.7	20.3%	19.9%	15.2%
Hardware, RUB bn	586.3	588.3	655.4	828.2	970.7	1 112.1	13.6%	17.2%	14.6%
Servers	169.6	182.8	204.2	259.6	312.7	358.3	16.1%	20.5%	14.6%
Network equipment	153.1	130.1	144.6	189.9	219.6	249.5	10.1%	15.6%	13.6%
Data storage systems	117.7	119.1	122.3	154.2	175.3	197.4	10.9%	13.7%	12.6%
AI equipment	49.4	65.3	81.0	90.0	112.1	134.9	22.3%	24.6%	20.3%
Engineering equipment for data centers	70.8	60.7	63.4	73.7	85.5	96.9	6.5%	16.0%	13.3%
Security	25.7	30.9	39.9	60.8	65.2	75.1	23.9%	7.2%	15.2%
IT services, RUB bn	851.2	809.3	985.2	1 234.8	1 402.4	1 563.9	12.9%	13.6%	11.5%
System integration	409.0	360.0	427.7	520.9	578.1	633.6	9.1%	11.0%	9.6%
Information security	95.8	110.5	158.1	204.4	226.1	263.0	23.4%	10.6%	16.3%
Software development	109.4	121.4	145.7	184.8	221.9	243.5	17.4%	20.1%	9.7%
Outsourcing	118.2	106.8	130.3	166.1	191.3	211.1	12.3%	15.2%	10.4%
Consulting	83.4	66.0	66.7	91.3	101.7	111.2	5.9%	11.4%	9.4%
Colocation	27.9	36.6	44.2	52.5	63.9	77.2	22.6%	21.7%	20.8%
AI services	7.5	7.9	12.5	14.8	19.4	24.3	26.5%	30.8%	25.3%

The cloud market became the largest software market in 2025 and reached RUB 227 bn

The PaaS share is growing, but the market is still infrastructure-based (the IaaS share in 2025 is 82%)

Cloud market structure in 2025, RUB bn



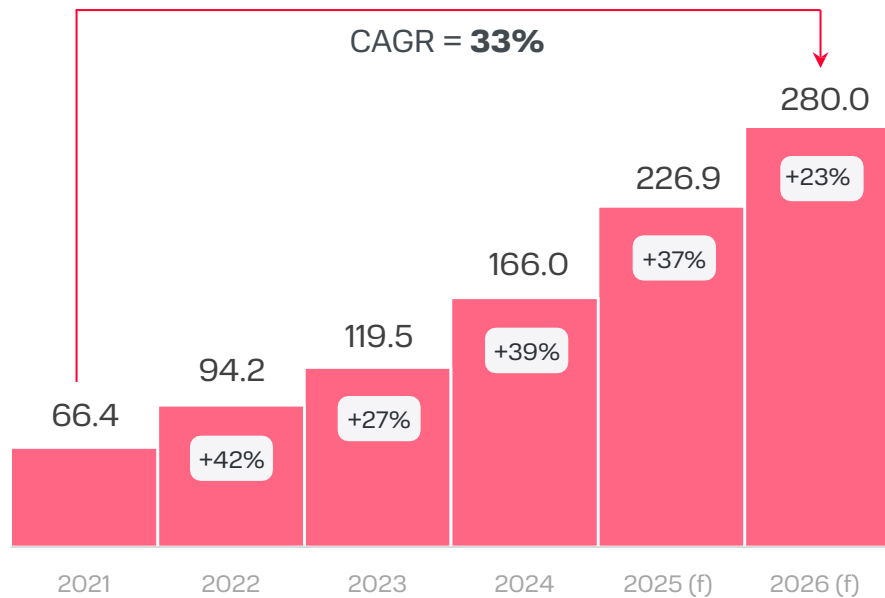
IaaS includes: computing, storage, networking.
PaaS includes data platforms, AI technologies, development and deployment tools, serverless computing, security, migration, management tools

The segment's market share, %, is indicated in brackets

The cloud market is moving from exponential expansion to **sustainable growth**, where **the PaaS segment is becoming the driver**

The market is maturing: the growth rate is declining, and annual growth is stabilizing the norm at the level of RUB 50–60 bn.

Cloud technology market size in 2021–2026 (f), RUB bn



Share of the software vertical in 2021

10.7%

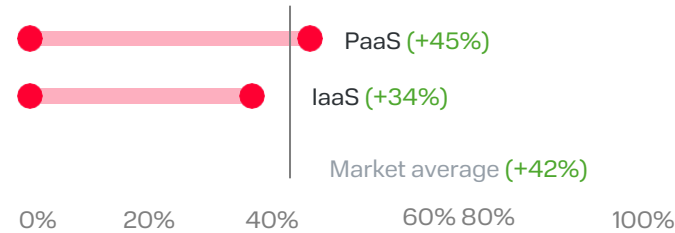


Share of the software vertical in 2026

15.8%

PaaS is the growth driver, however the base is small, therefore the share is growing slowly

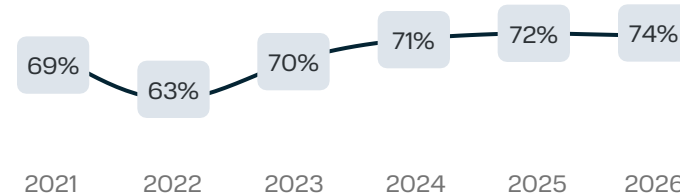
CAGR 2021–2025 of segments in the cloud market



Significant market participants



Market share of the top 5 players, %

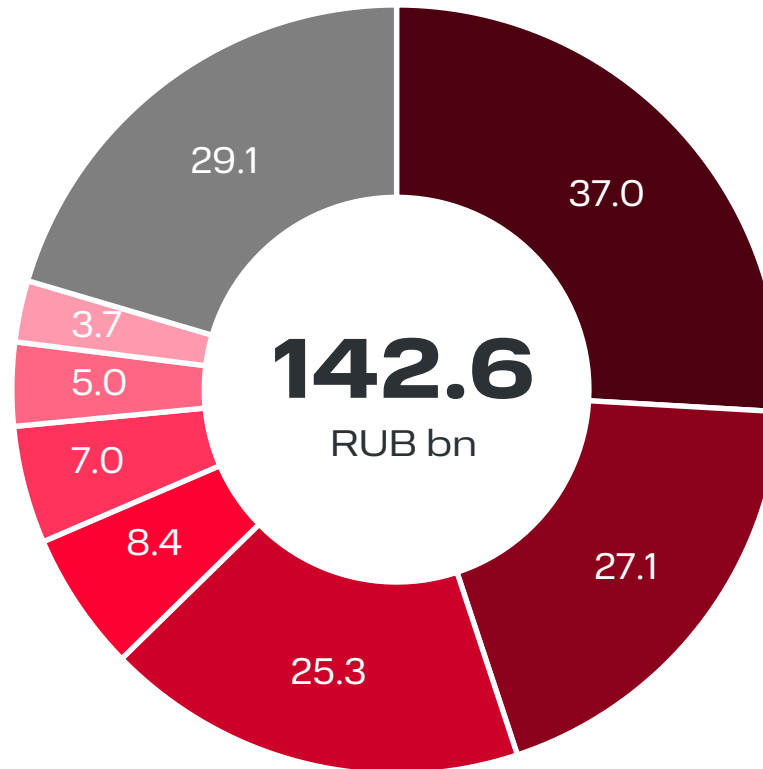


Platform software market: strong vendors have emerged in Russia that have successfully replaced foreign operating systems, platforms, and virtualization systems

About 63% of the platform software market is accounted for by operating systems, virtualization and development

Platform software market structure in 2025, RUB bn

- Operating systems (26%)
- Virtualization and container virtualization systems (19%)
- Development tools (18%)
- Telecom software (6%)
- Performance monitoring and management (5%)
- VDI (4%)
- Backup and archiving (3%)
- Other (20%)

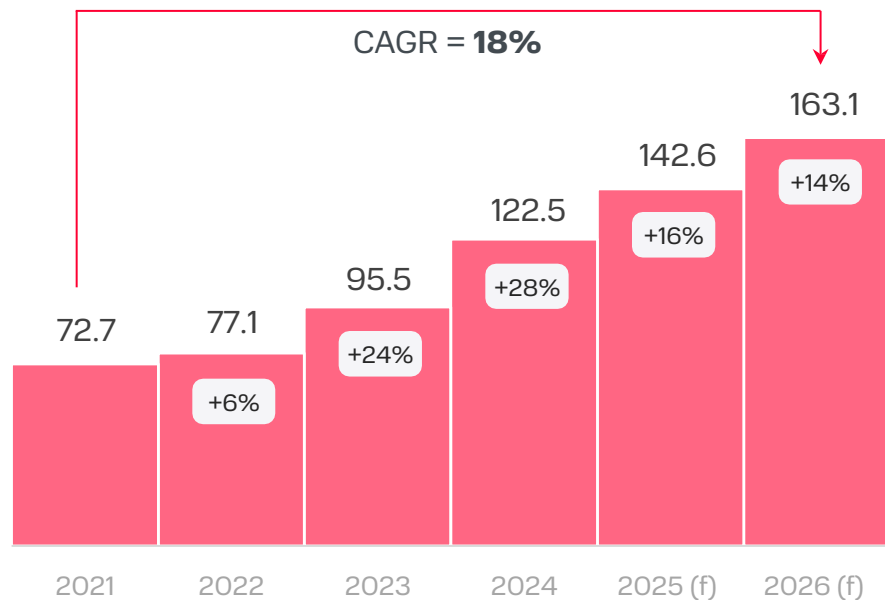


The segment's market share, %, is indicated in brackets

The platform software market is entering the **stage of structural growth**: dynamics are stabilizing, and development is supported by the transformation of the competitive environment

Market growth in 2025/26 will be driven by import substitution in the public and corporate sectors

Platform software market size in 2021–2026 (f), RUB bn



Share of the software vertical in 2021

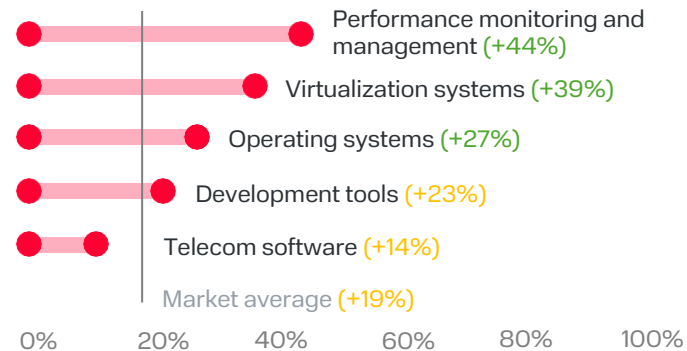
11.7%

Share of the software vertical in 2026

9.2%

Operating systems and virtualization are growing most rapidly amidst the major market segments

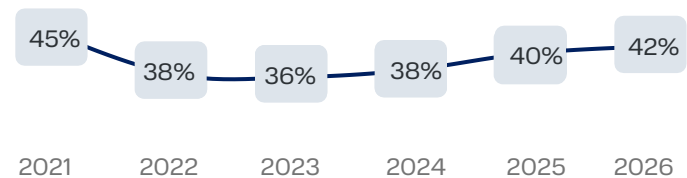
2021–2025 CAGR of platform software market segments



Significant market participants



Market share of the top 5 players, %

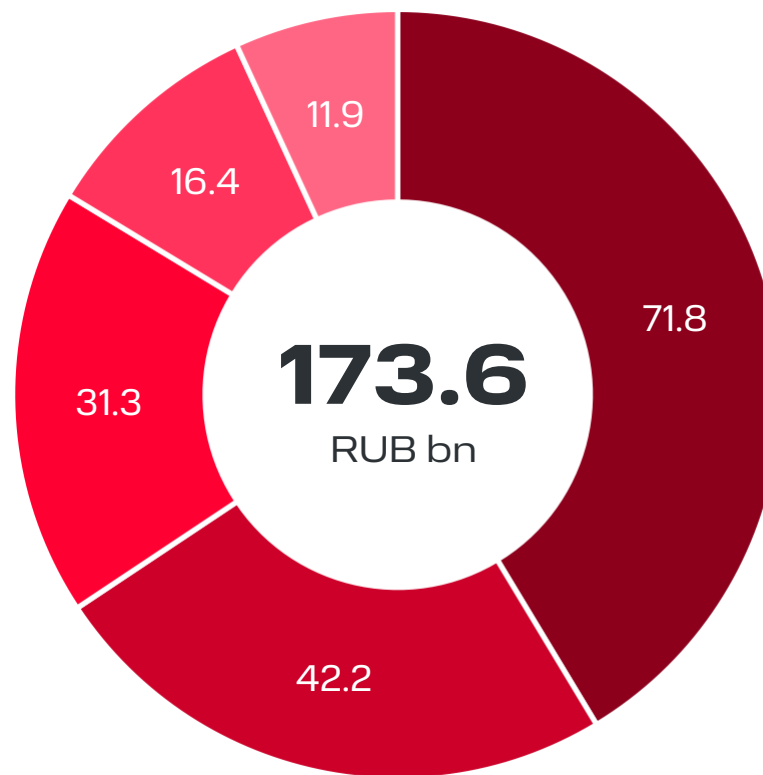


ERP, accounting and bookkeeping market: slow but steady import substitution of the most complex corporate systems continues

ERP systems and accounting software take similar market positions and form its basis (more than 80%)

ERP, accounting, and bookkeeping market structure in 2025, RUB bn

- ERP (41%)
- Accounting and taxation software (24%)
- Financial and managerial accounting software (18%)
- Governance, risk, and compliance systems (10%)
- Billing systems (7%)

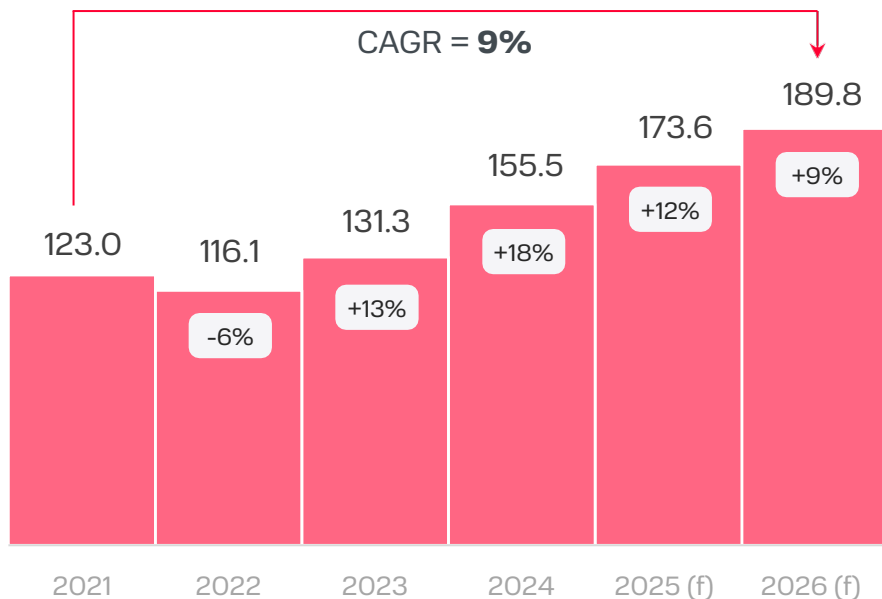


The segment's market share, %, is indicated in brackets

The market is growing moderately, while the functional and architectural complexity of systems is increasing

The market is growing in depth: import substitution, transition to cloud/hybrid ERP, integration with corporate analytics and AI

ERP, accounting, and bookkeeping market size in 2021–2026 (f), RUB bn



Share of the software vertical in 2021

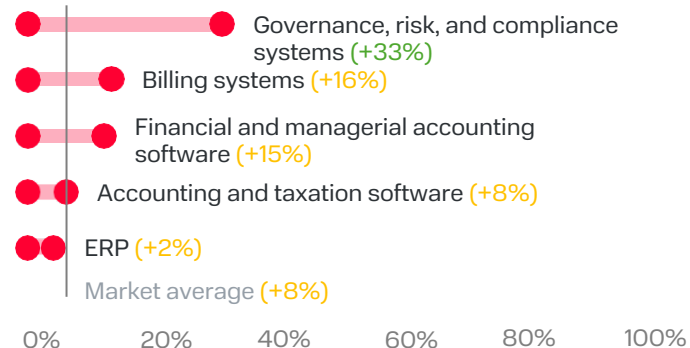
19.8%

Share of the software vertical in 2026

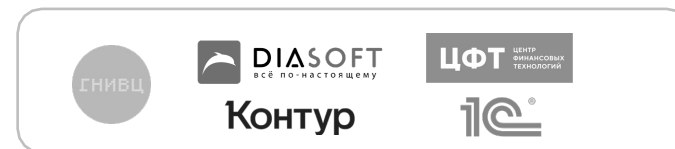
10.7%

The fastest growing market segment is governance, risk, and compliance system

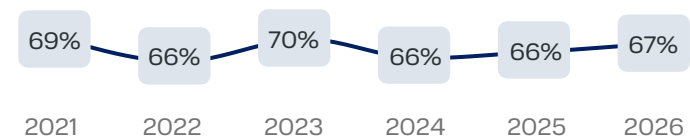
CAGR 2021–2025 for ERP, accounting, and bookkeeping market segments



Significant market participants



Market share of the top 5 players, %

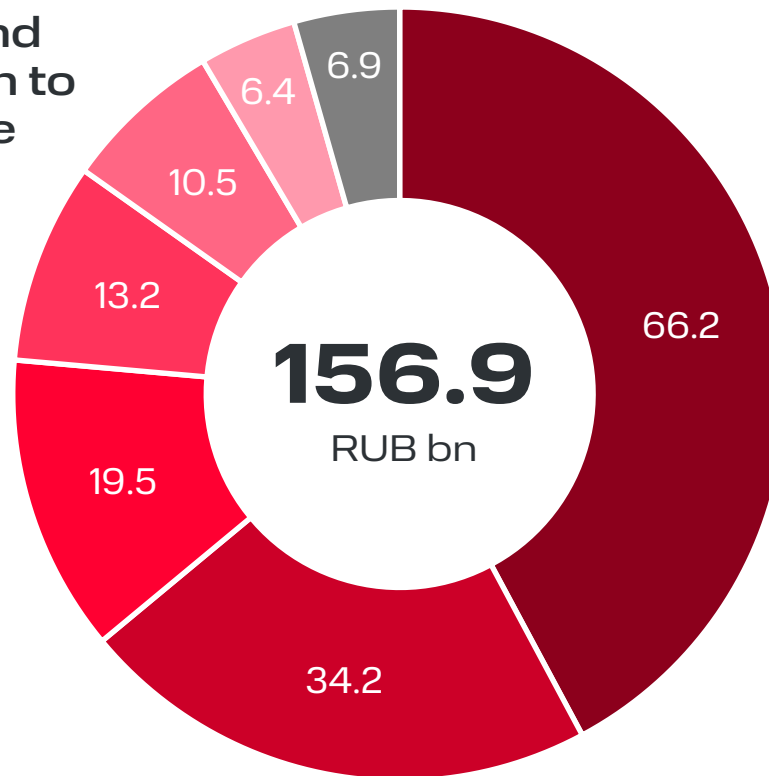


Data management market: corporate data volumes are growing exponentially, therefore more and more data management platforms are needed

Market development is directly linked to the growth in volumes and diversity of data and the transition to more complex architecture for the implementation of AI solutions

Data management market structure in 2025, RUB bn

- Scientific and analytical software (42%)
- Interactive analytics and data visualization (22%)
- Data warehouses (12%)
- Relational databases (8%)
- Parallel and distributed data processing (7%)
- Master data management (MDM) systems
- Other (4%)

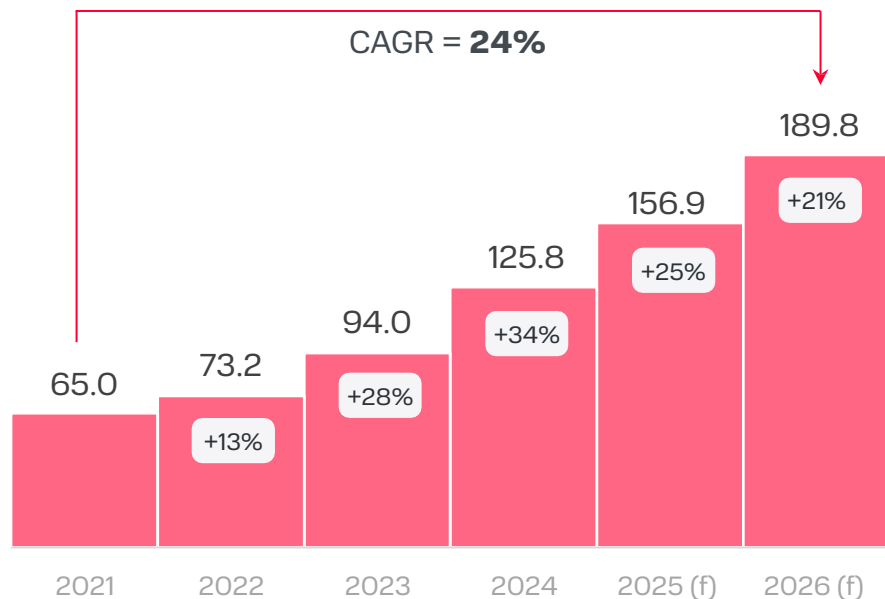


The segment's market share, %, is indicated in brackets

Data management is becoming a core infrastructure: the market remains dynamic, gradually moving to a more sustainable growth model

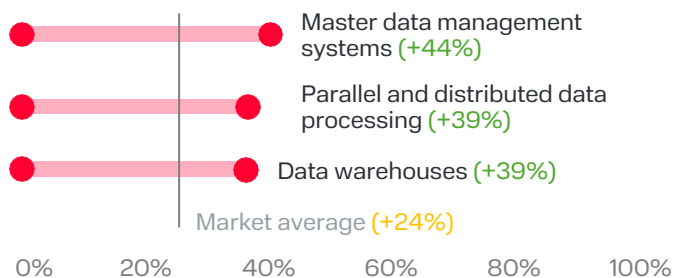
Market growth accelerated during 2021–2025, however in the coming years, the growth rate is expected to decline due to the achievement of a significant market size

Data management market size in 2021–2026 (f), RUB bn



Growth drivers include parallel and distributed data processing, master data management systems

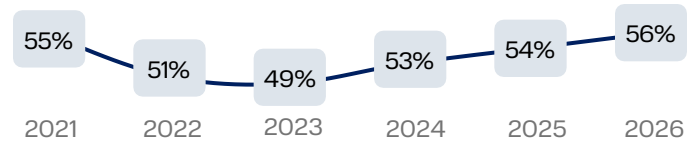
2021–2025 CAGR of segments in the data management market



Top companies – the most significant players in the market



Market concentration level of the top 5 participants



Share of the software vertical in 2021



Share of the software vertical in 2026

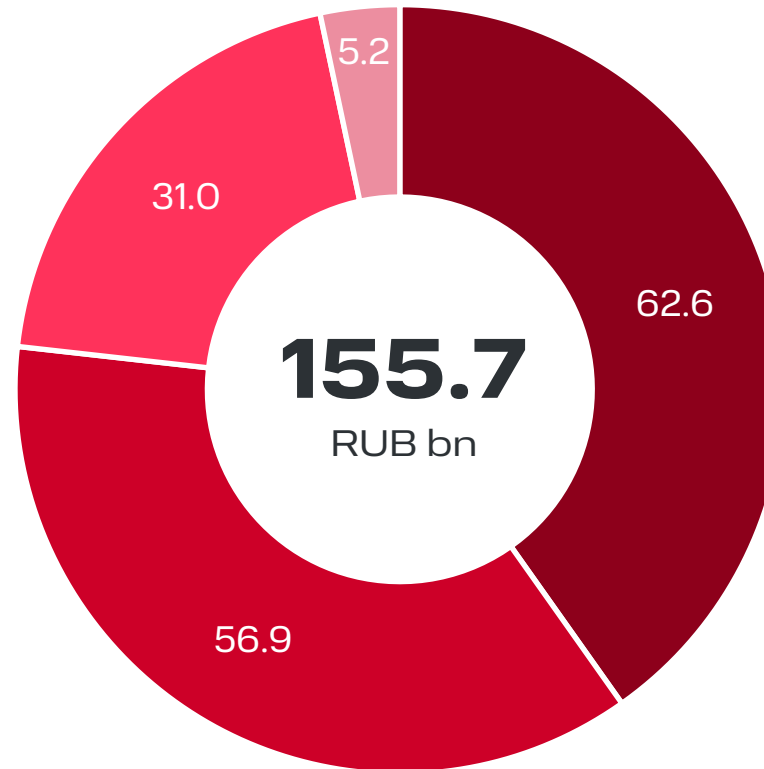


The market of collaboration with customers is growing across the board thanks to digitalization and automation of customer journeys

The market is emerging as a unified ecosystem of customer-related digital solutions

Collaboration with customers market structure in 2025, RUB bn

- Marketing software (40%)
- Electronic procurement (37%)
- CRM (20%)
- Multimedia and content production (3%)

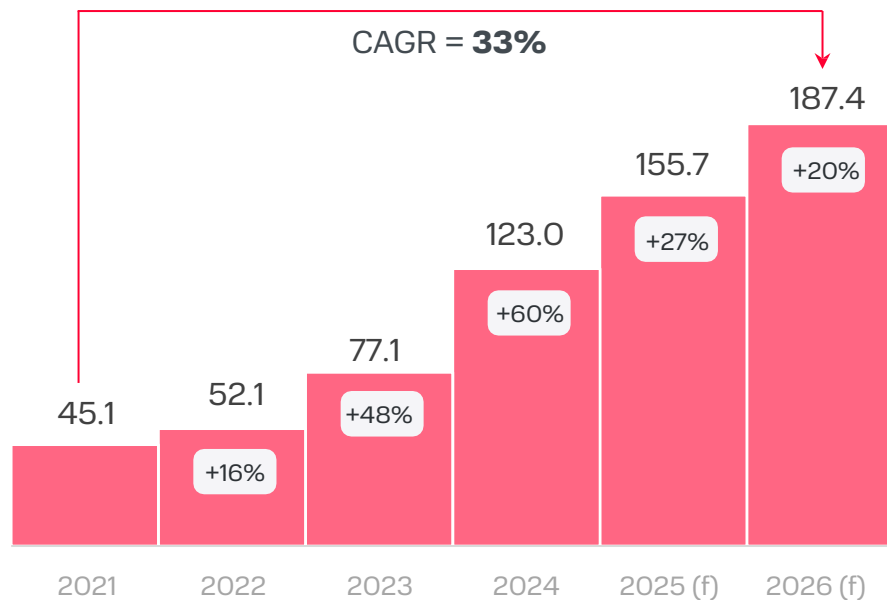


The segment's market share, %, is indicated in brackets

The customer platform market is showing structural acceleration, becoming one of the most dynamic segments of enterprise software

The market is growing due to increased demand for targeted customer search and retention, omnichannel communications, and the implementation of AI

The size of the market of collaboration with customers in 2021–2026 (f), RUB bn



Share of the software vertical in 2021

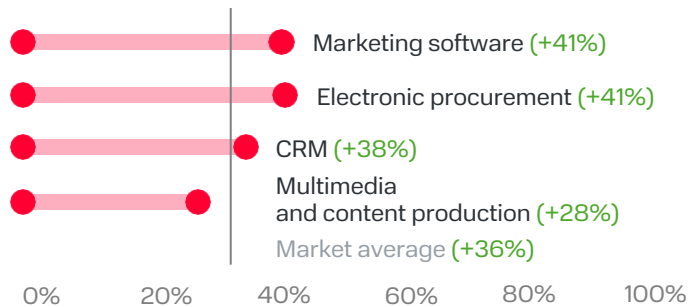
7.3%

Share of the software vertical in 2026

10.6%

Marketing software is the leader in both overall market share and growth rates

2021–2025 CAGR of collaboration with customers market segments



Significant market participants



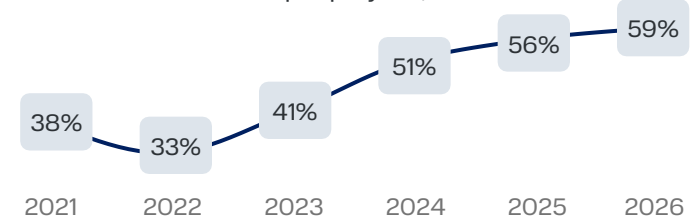
СБЕР
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Контур

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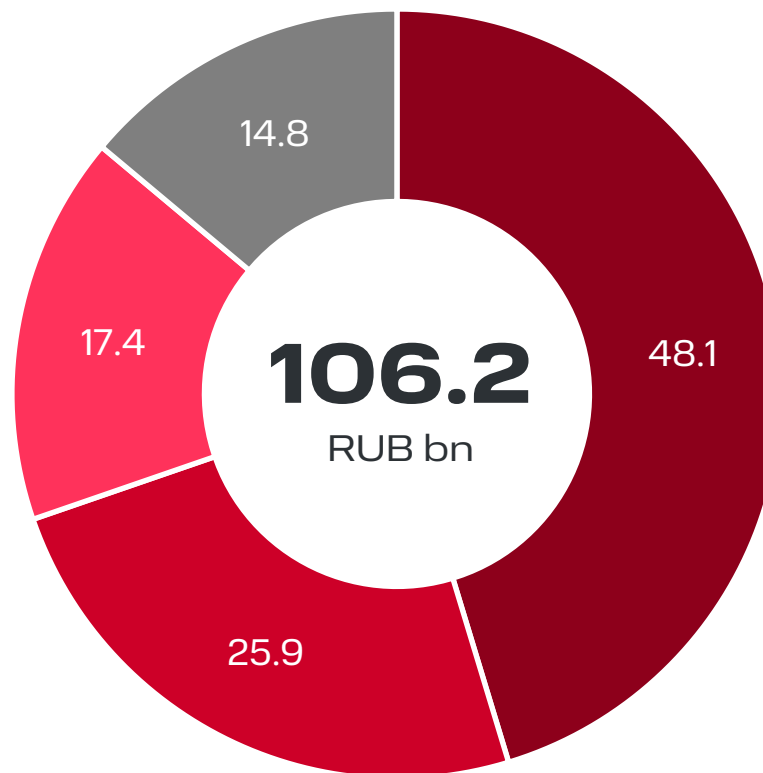
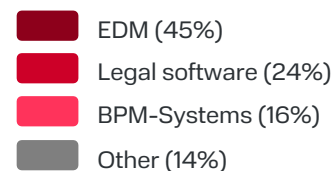
Market share of the top 5 players, %



Business management systems market: electronic document management has become the basis for the automation of business processes

Electronic document management (EDM) systems account for about half of the market

Business management market structure in 2025, RUB bn

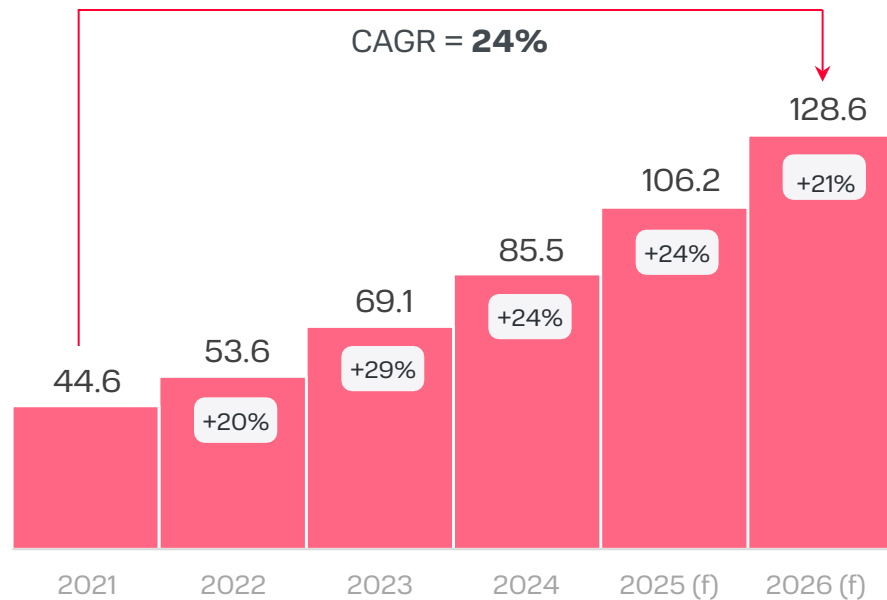


The segment's market share, %, is indicated in brackets

Business process management solutions are reaching a mature scaling stage, becoming the core of digital transformation of in-house operations

The business management market is projected to grow by RUB 20+ bn annually in 2025 and 2026.

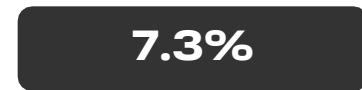
Business management market size in 2021–2026 (f), RUB bn



Share of the software vertical in 2021

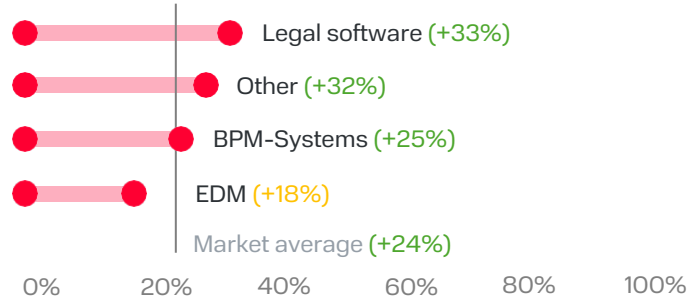


Share of the software vertical in 2026



Small segments are growing at an accelerated pace, while EDM is at the saturation stage (moderate growth)

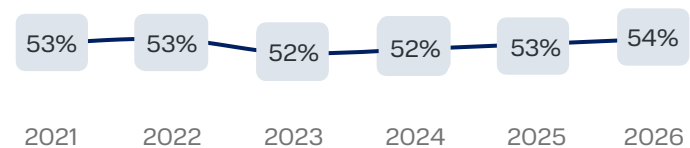
CAGR 2021–2025 of segments in the business management market



Significant market participants



Market share of the top 5 players, %

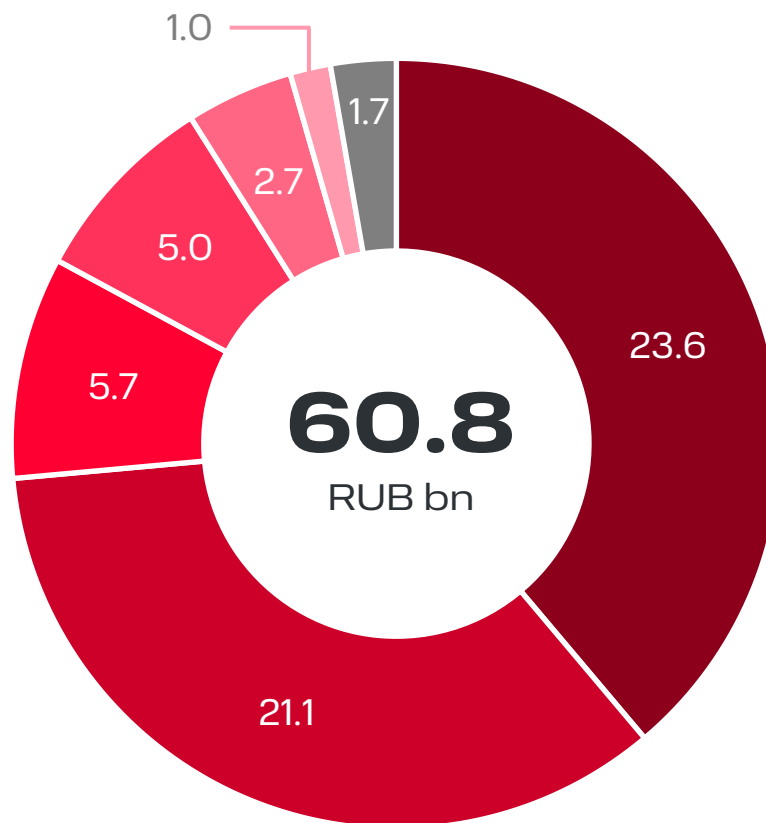


AI Market: fastest-growing market in 2026, adoption of agents and AI platforms just beginning

The two largest segments account for 74% of the market: computer vision and chatbots/virtual assistants

AI software market structure in 2025, RUB bn

- Computer vision (39%)
- Chatbots/virtual assistants (35%)
- NLP (9%)
- AI analytics (8%)
- RPA (5%)
- Collaboration on models and reports (2%)
- Other (3%)

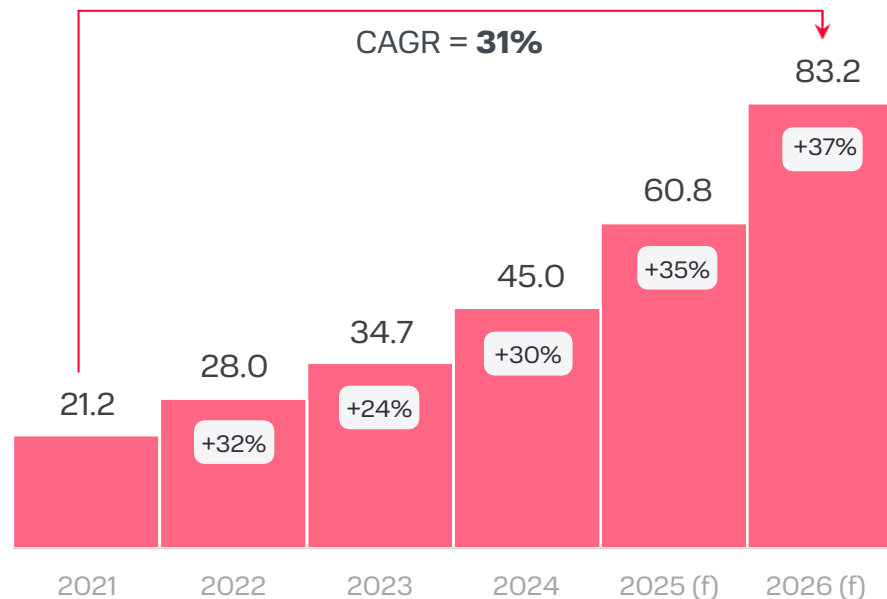


The segment's market share, %, is indicated in brackets

AI-powered solutions are becoming a strategic element of corporate IT landscapes against the backdrop of accelerated digitalization

The software AI market will grow in the future not only in absolute terms, but also gain growth rates year-on-year

Software AI market size in 2021–2026 (f), RUB bn



Share of the software vertical in 2021

3.4%

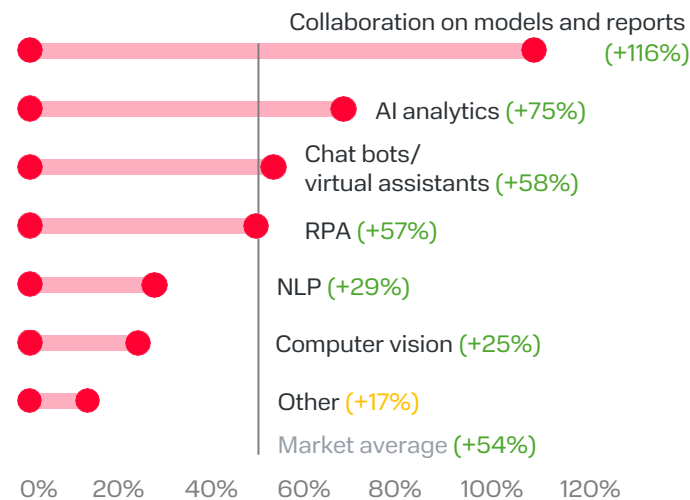


Share of the software vertical in 2026

4.7%

High CAGR (116%): infrastructure control plane for scaling AI in businesses

CAGR 2021–2025 segments in software AI



Significant market participants



AI

Яндекс

СБЕР

Market concentration level of the top 5 participants

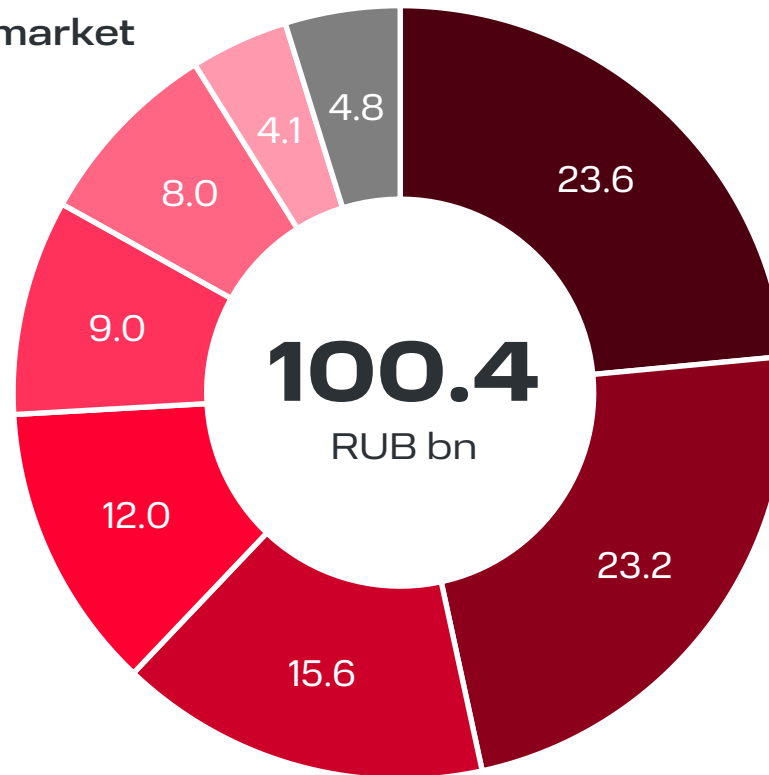
36%

Productivity market: growing rapidly with new cloud collaboration products

Editors and communications are the foundation of the productivity market

Productivity market structure in 2025, RUB bn

- VoIP and telephony (23%)
- Video Conferencing (23%)
- Documents and text editors (16%)
- Postal services (12%)
- Corporate messengers (9%)
- Presentations and visualizations (8%)
- Project and task management (4%)
- Other (5%)

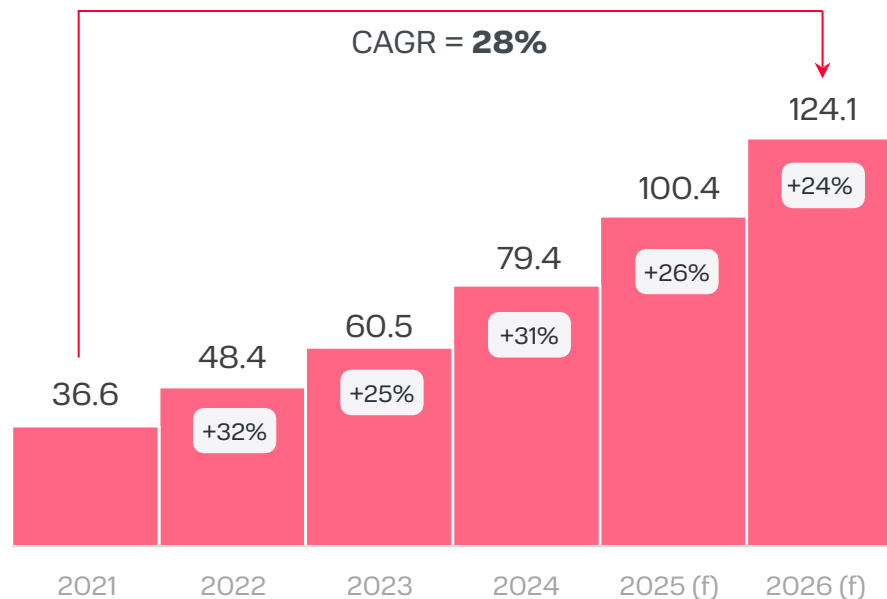


The segment's market share, %, is indicated in brackets

Collaboration ecosystems are becoming the new core of the office productivity market

With the departure of foreign suppliers, market growth has accelerated, with the expected volume exceeding RUB 120 bn by 2026.

Productivity market size in 2021–2026 (f), RUB bn



Share of the software vertical in 2021

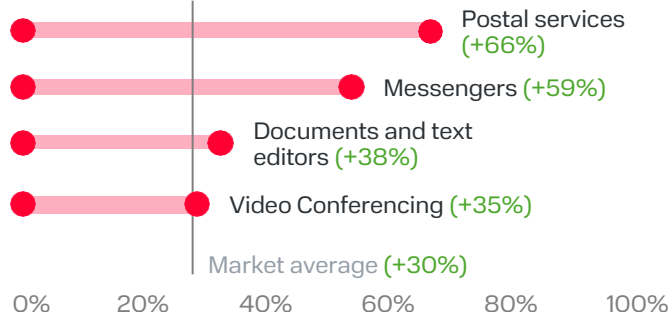
5.9%

Share of the software vertical in 2026

7.0%

The postal communication systems segment is the market driver

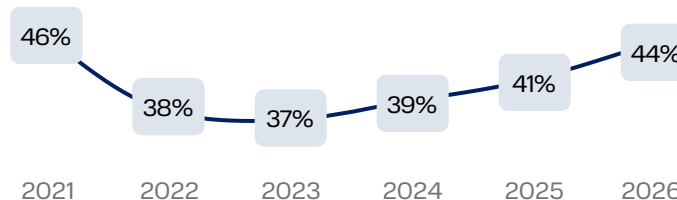
2021–2025 CAGR of productivity market segments



Top companies – the most significant players in the market



Market concentration level of the top 5 participants



Software for manufacturing industry: the market is growing moderately due to the long development cycle of complex specialized software

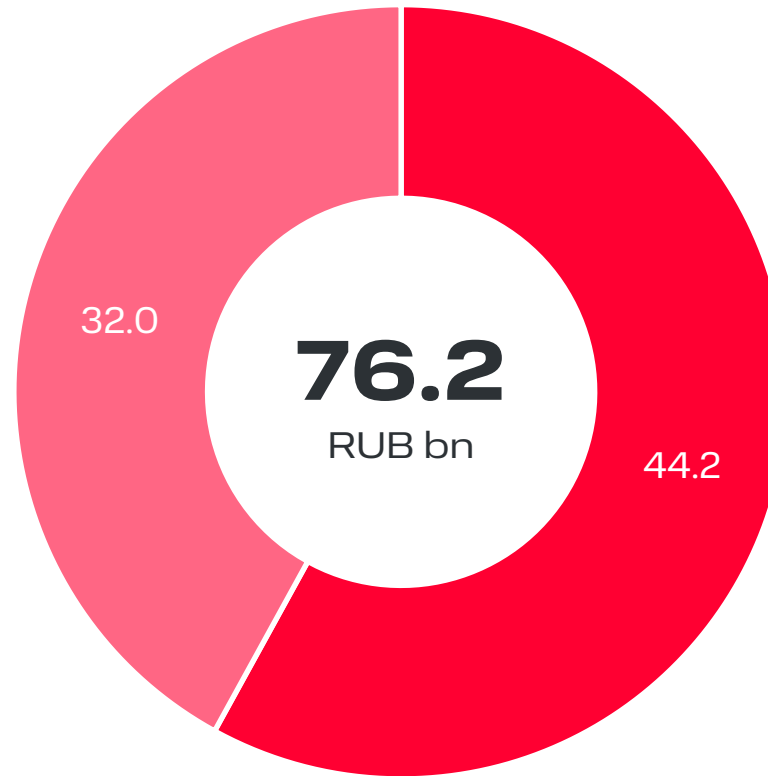
The market is moving towards the integration of various systems, automated generation of processes, flow process charts, and control programs

Structure of the market of software for manufacturing industry in 2025, RUB bn

- Manufacturing and logistics (58%)
- Engineering software (42%)

The manufacturing and logistics segment includes MES, WMS, SCM, MRP, automated process control systems, dispatching systems, software for managing IoT devices, and maintenance and repair management Engineering software includes CAD, CAM, CAE, PLM/PDM, and BIM design software

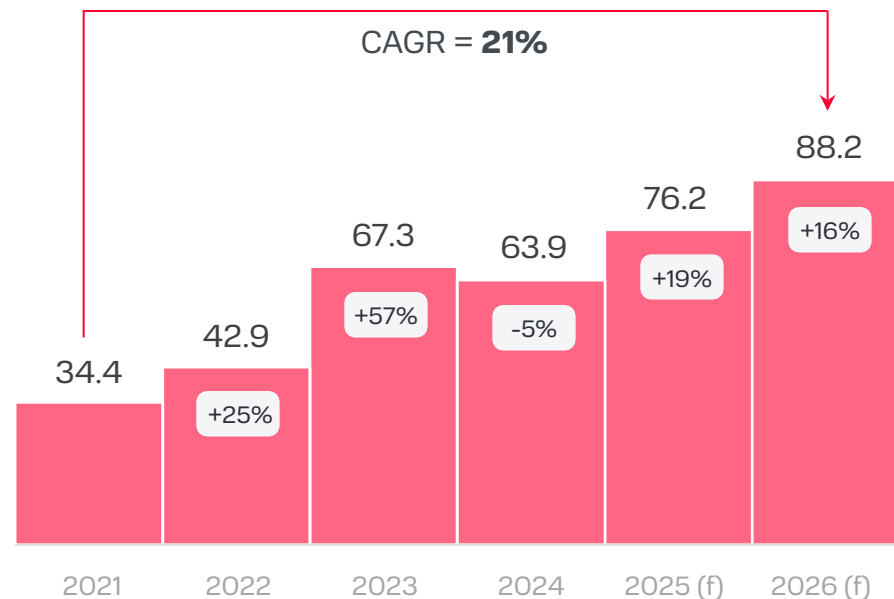
The segment's market share, %, is indicated in brackets



Integration of engineering and manufacturing systems is creating new dynamics in the industrial software market

Significant growth in 2023 is primarily due to the increasing complexity of supply chains and the transition to licensed domestic solutions

Size of the market of software for manufacturing industry in 2021–2026 (f), RUB bn



Share of the software vertical in 2021

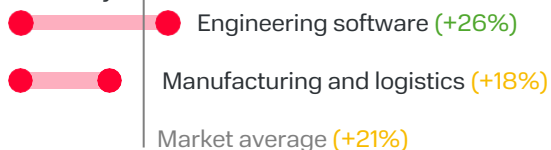
5.5%

Share of the software vertical in 2026

5.0%

Both segments of this market are growing at comparable rates, and this trend is also evident in individual types of software within the segments

CAGR 2021–2025 of segments in the market of software for manufacturing industry

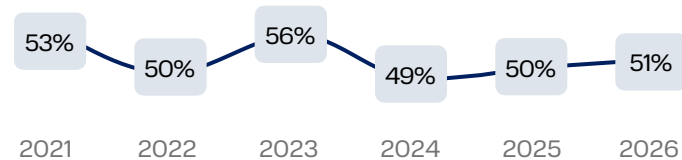


0% 20% 40% 60% 80% 100%

Top companies – the most significant players in the market



Market concentration level of the top 5 participants



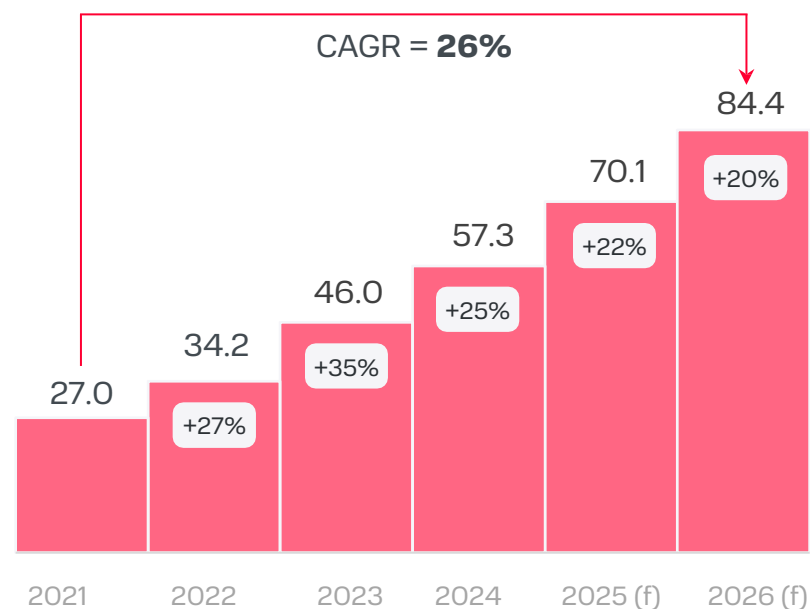
Payment systems market: divided between 5 players

Payment systems are already an element of the basic infrastructure for the market

- Market growth in this segment is uniform, without significant sudden changes (CAGR in comparable prices 17.4%, in current prices 27.3%) however, one can note the ongoing localization of the payment infrastructure, which was one of the key drivers in the 2019–2024 period and reached saturation by 2025
- Payment systems have evolved from niche fintech tools into critical infrastructure for the digital economy: they must scale to handle billions of transactions, operate 24/7, and integrate into ecosystems and marketplaces. As a cloud provider, we see that sustainable growth in this market is impossible without flexible cloud architecture, potent data platforms, and AI services for anti-fraud and compliance – this is where a new growth point for the entire financial sector is emerging today

The market is growing steadily, and the influence of foreign vendors is insignificant

Payment systems market size in 2021–2026 (f), RUB bn



IT market share in 2021

4.3%

IT market share in 2026

4.8%

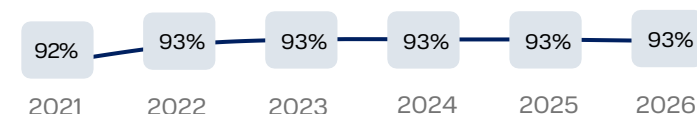
The market is highly developed, current solutions take up a significant share

- Further market growth is driven by the expansion of the platform economy (growth of e-commerce, subscription services, EdTech, and digital content)
- The requirements of the regulatory bodies for accessibility, fault tolerance, and transaction monitoring are growing, anti-fraud and AML/KYC controls are being intensified -> modernization of processing platforms, implementation of new modules, and increased added value of products
- The integrated services in addition to basic features and functionality of payment systems are expected to develop: anti-fraud, scoring, subscription management, split payments, integration via API, payment modules for marketplaces and ecosystems

Significant market participants



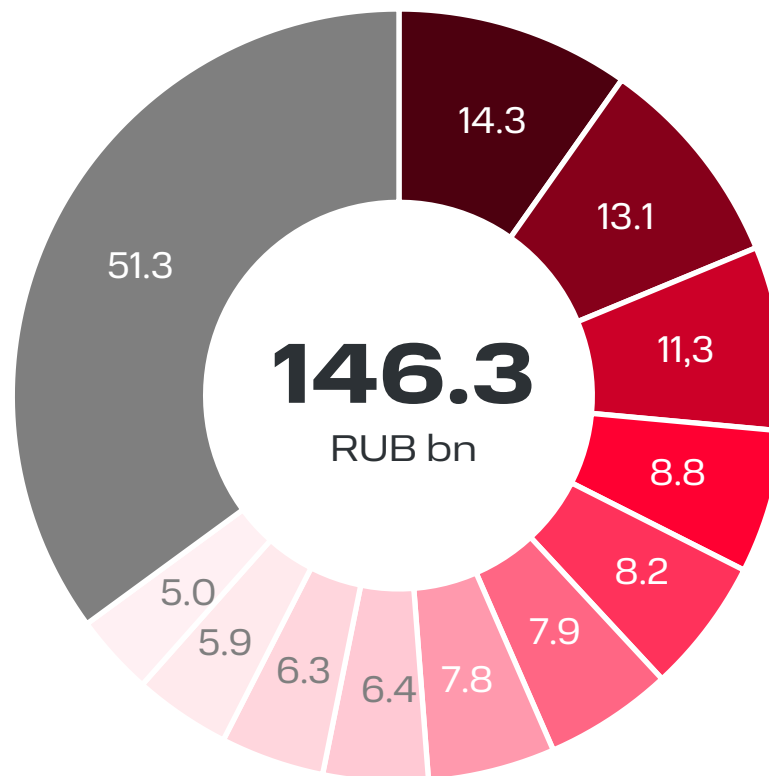
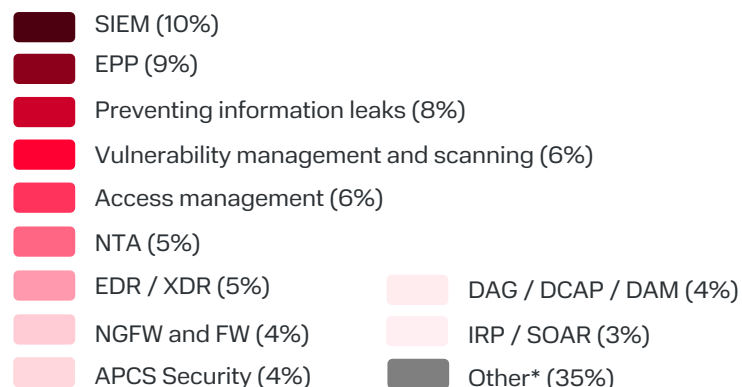
Market concentration level of the top 5 participants



Cybersecurity software market: the upside of rising cyberattacks – accelerated growth across all classes of information security solutions

The growth of successful cyberattacks in 2025 will exceed 30% compared to 2024

Cybersecurity software market structure in 2025, RUB bn

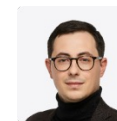


The segment's market share, %, is indicated in brackets

* This also includes more than 20 cybersecurity categories, including SAST/DAST, Sandbox, SEG, SWG, TIP and others

“

Monitoring information security events and timely response to incidents before damage occurs is one of the main focuses of companies in the past and following years. The above requires more complex tools – EDR, NTA, deception, etc.; these are the classes of solutions that demonstrate good dynamics year on year. This also affects the development of the market for services – MSS – that help companies quickly ensure protection based on modern technologies without long-term investments in building IS teams and proactive protection processes



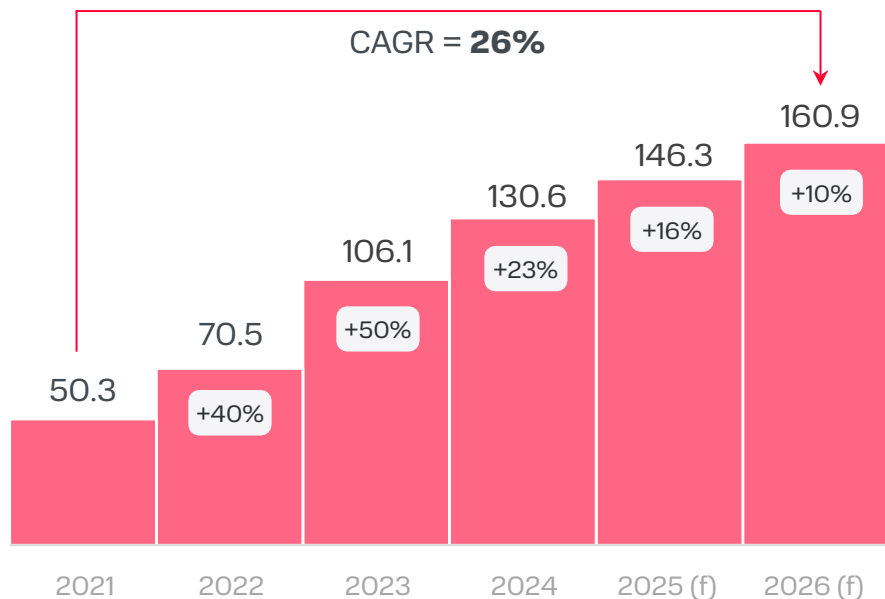
Alexander Osipov

CEO Red Security

The information security segment is developing at an accelerated pace, moving from point protection solutions to comprehensive platforms

Market growth rate is decreasing after a peak in 2023: the market is entering a more mature phase, however continues to expand

Cybersecurity software market size in 2021–2026 (f), RUB bn



Share of software in 2021

8.1%



Share of software in 2026

9.1%

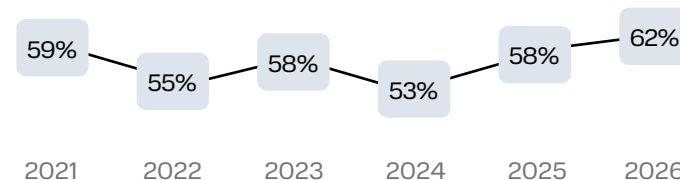
Further growth is driven by tightening cybersecurity requirements and increasing complexity of products

The main drivers are regulatory requirements and the increasingly complex cyber threats. Now, the consequences of a cyberattack are much more likely to lead to business interruption, fines, and even company winding-up. Organizations have begun investing not only in specific solutions for reactive protection (antiviruses), but also platforms for proactive protection (XDR, SASE).

Significant market participants



Market concentration level of the top 5 participants

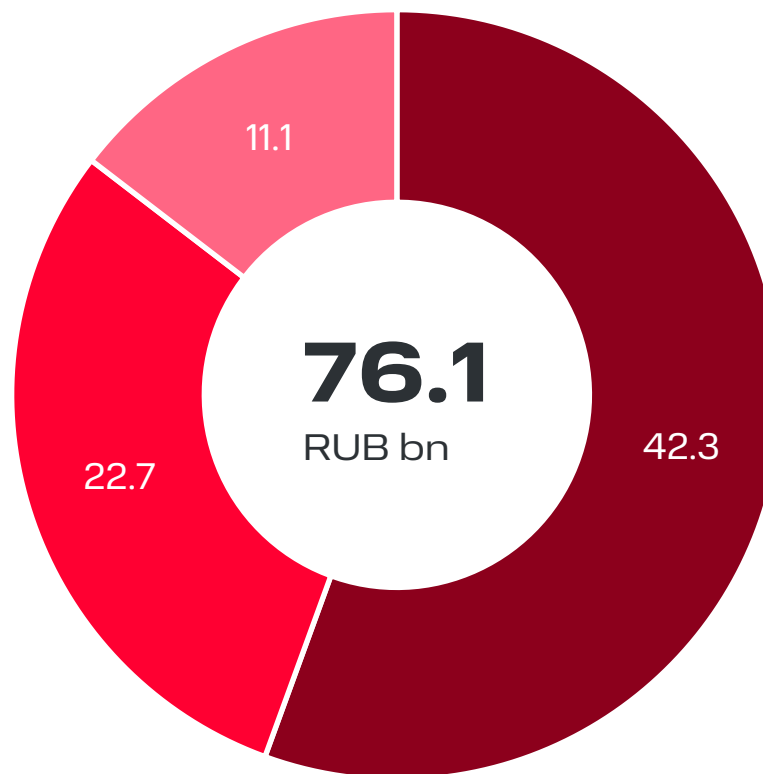


Personnel and knowledge management market: Learn, learn more, learn forever – the market is growing due to education and corporate knowledge bases

The market structure is formed by two basic segments: HR software and education

Structure of the personnel and knowledge management market in 2025, RUB bn

- HR software (56%)
- Educational software (30%)
- Enterprise content management (14%)

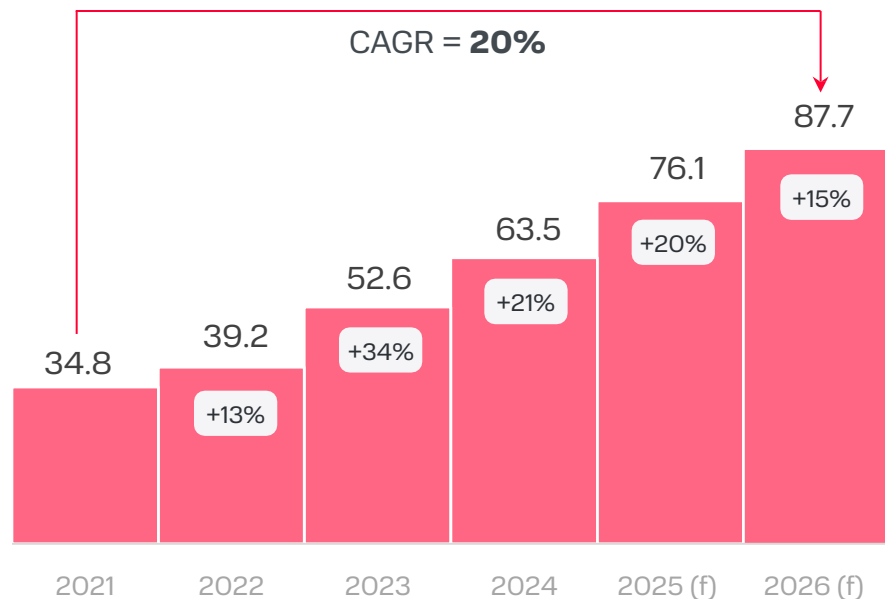


The segment's market share, %, is indicated in brackets

The market is developing steadily, reflecting the transition of companies to systemic management of competencies and corporate expertise

The market is growing rapidly (CAGR 20%), however its share in the overall software vertical is gradually decreasing

The market size of personnel and knowledge management systems in 2021–2026 (f), RUB bn



Share of the software vertical in 2021

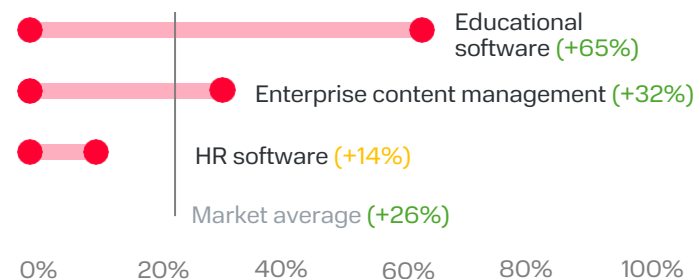
5.6%

Share of the software vertical in 2026

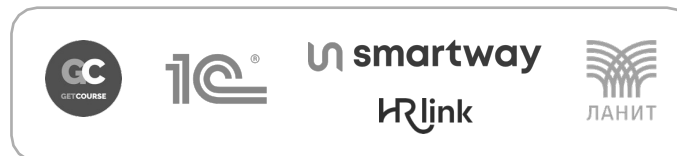
5.0%

Educational software is a key driver of market growth, driven by growing interest in online education

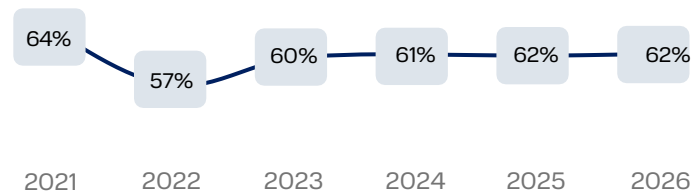
2021–2025 CAGR for segments in the personnel and knowledge management system market



Significant market participants



Market share of the top 5 players, %

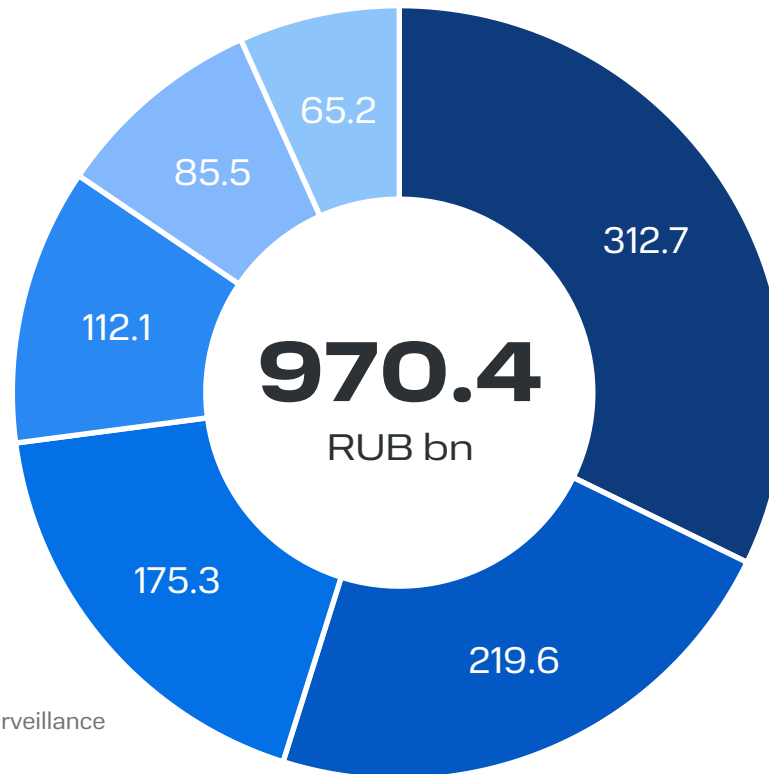


Hardware: is growing, but its share of the overall market is declining due to migration to the cloud

A new significant segment is AI equipment already RUB 112 bn

Hardware market structure in 2025, RUB bn

- Servers (32%)
- Network equipment (23%)
- DSS (18%)
- AI equipment (12%)
- Engineering equipment for data centers (9%)
- Security* (7%)



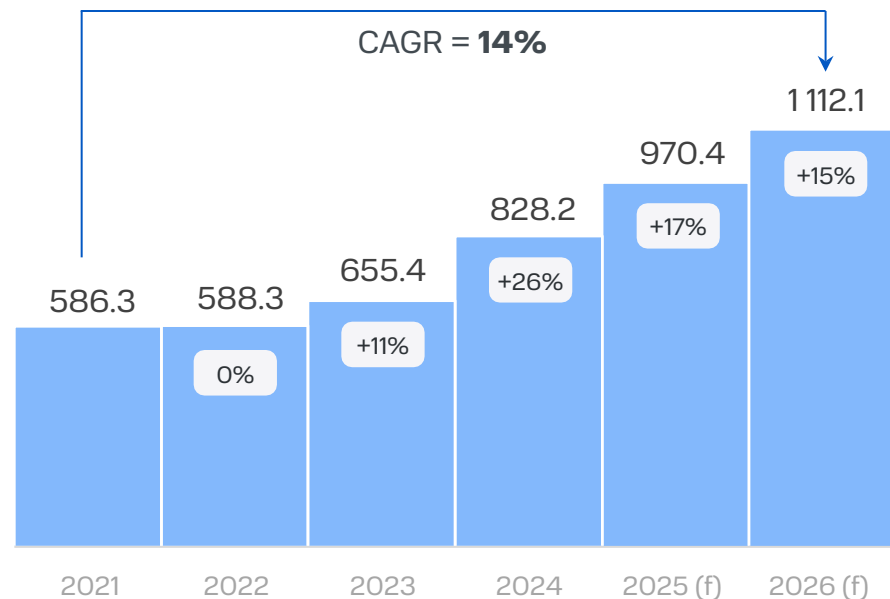
*The security market includes both cybersecurity solutions and video surveillance cameras, access control and other information security tools

The segment's market share, %, is indicated in brackets

The computing technology market is growing at a moderate pace, providing the processing foundation for clouds, AI, and enterprise systems

The hardware market share will decrease to 25.0% of the total IT market in 2026

Hardware market size in 2021–2026 (f), RUB bn



IT market share in 2021

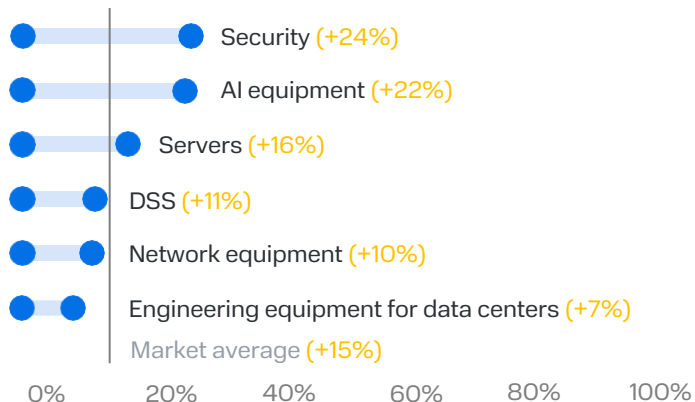
28.5%

IT market share in 2026

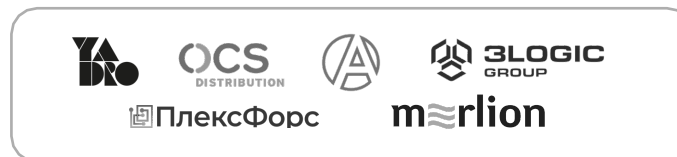
25.0%

AI and security are growing at the same rate

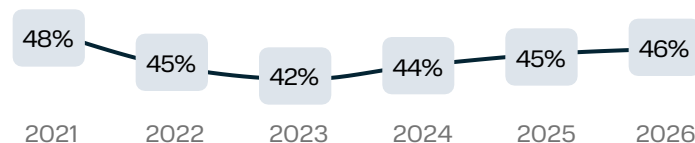
2021–2025 CAGR of segments in the Hardware vertical



Significant market participants



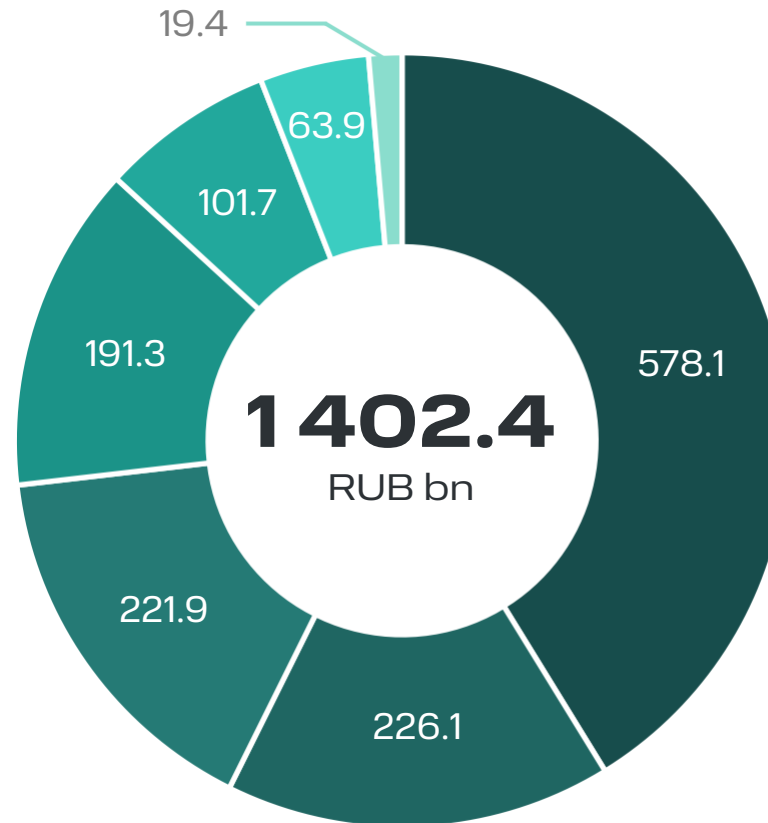
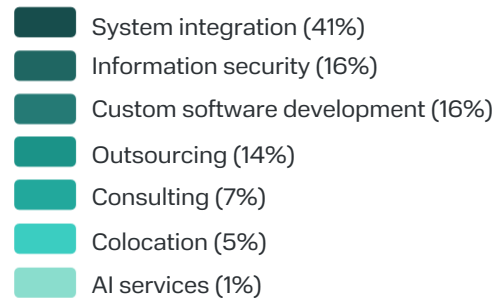
Market concentration level of the top 5 participants



IT services: the market is growing, but losing share to software – integrators and custom developers are becoming vendors

The core of IT services is projects for building and rebuilding the IT landscape of businesses

IT services market structure in 2025, RUB bn

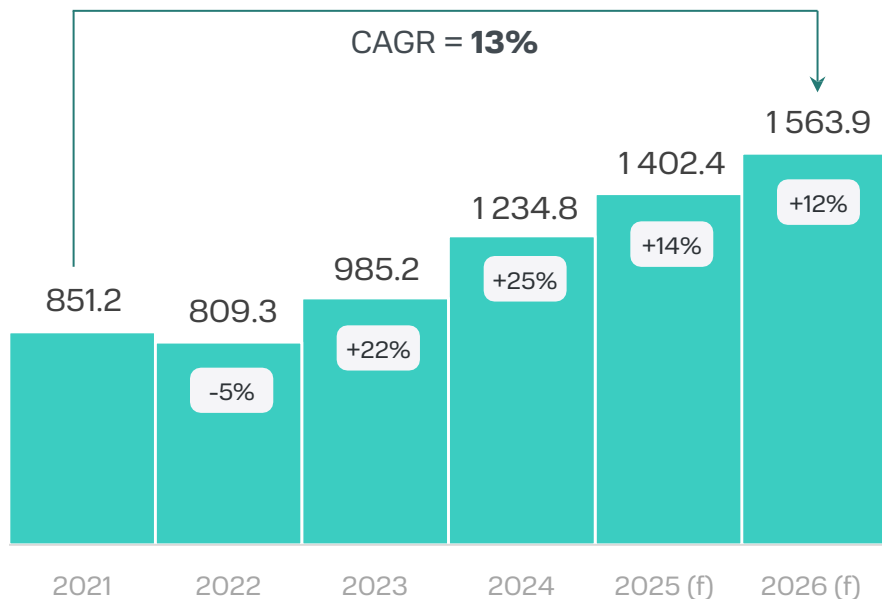


The segment's market share, %, is indicated in brackets

Further market growth is driven by reduced in-house IT-costs, growing demand for information security services, and pent-up demand for colocation

The market has entered a phase of normalization. Market growth continues, but it is transitioning from a “catch-up” period after the stress year in 2022 to a “structural” one.

IT services market size in 2021–2026 (f), RUB bn



IT market share in 2021

41.3%

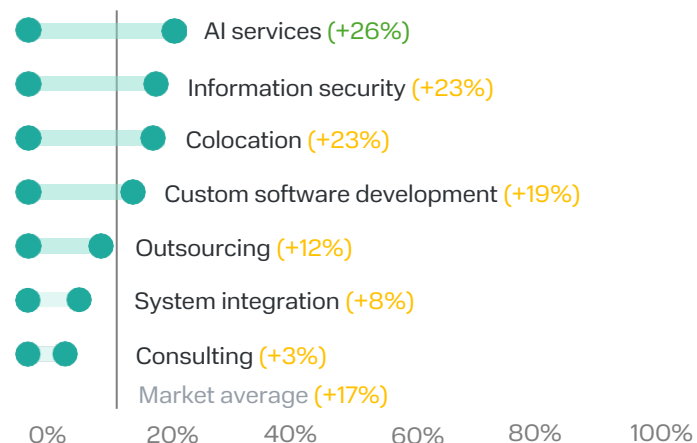


IT market share in 2026

35.8%

Small markets show high potential and drive market growth – AI services and colocation

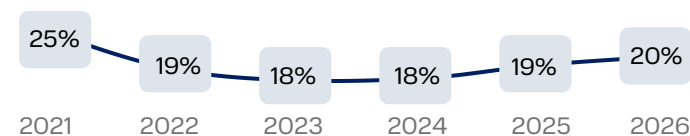
CAGR 2021–2025 for segments in the IT services vertical



Significant market participants



Market concentration level of the top 5 participants



Concluding part

The concluding part of the study summarizes the results of the analysis and presents key findings about the Perspectives for the Russian IT market. It reveals the most significant trends and serves as an important reference point for market participants and concerned parties

In this section we cover the following issues:

- ↳ [Conclusion](#)
- ↳ [Disclaimer](#)



Conclusion

We at **MWS Cloud** will continue to systematically and annually deepen our analysis of the IT market

Detailed and methodologically verified analytics are not just data, but a strategic landmark that helps companies make management decisions and confidently plan development in the context of rapid technological change

The MWS Intelligence Team is committed to maximum openness and transparency in its interaction with the market. We are open to collaboration, dialogue, and the exchange of expertise. We are ready to discuss our research, approaches, and conclusions, and answer any questions our customers and colleagues may have. It's important for us to be more than just a source of analytics, but a reliable and understandable partner with which it's convenient and safe to build the future of the IT market

All studies
MWS Intelligence Team



Ask a question about
the study in TG



Email: Intelligence_team@mts.ru

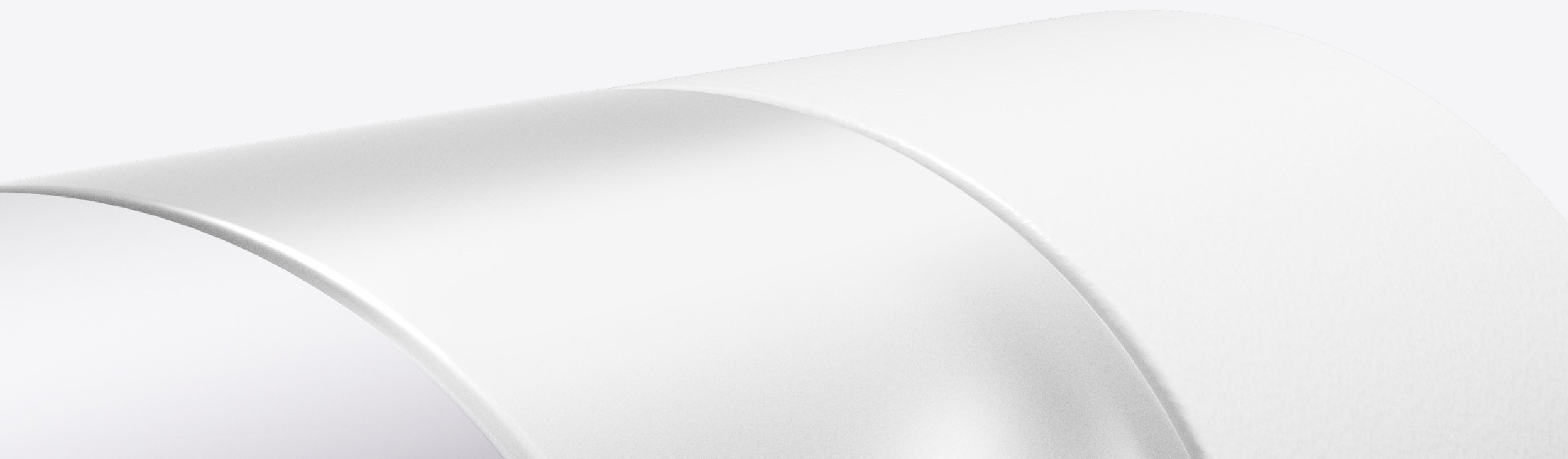
Disclaimer

This study is a compilation with in-depth processing of various approaches and methodologies that are found in the Russian and global markets. Key properties and differences from other analytical reports are presented below:

- This IT MARKET study is focused exclusively on the B2B and B2G segments and does not include B2C assessment, unless the cases when IT companies have universal offerings for customer segments.
- The IT market size does not include the Telecom segment in its entirety; only the software component of this market is considered. At the same time, there is an obvious merger with certain segments of the IT MARKET, for example, with cloud technologies. In addition, it is characterized by a significant scale of business with certain specialized market players. At the same time, the study covers network technologies and network equipment, since they are important components of the IT MARKET.
- Calculations of the Hardware volume do not include devices such as peripheral equipment, mobile phones and similar elements of technical support for company employees, because their sales are often not clearly divided between the B2B and B2C segments. The above creates difficulties in analyzing and interpreting data
- In this study, the volume of the IT MARKET is calculated taking into account the revenue of foreign companies. The degree of influence of foreign companies on different market segments varies and is not uniform. Until 2022, in the Russian market, the role of foreign companies in the IT MARKET was not always open (companies often resorted to sales through partners), and after their departure, against the backdrop of a tightening sanctions policy, the revenue from products of these companies decreased significantly or migrated to the “grey” zone. We carefully assess the degree of influence of foreign companies on the Russian IT MARKET, so the scope of Western vendors included only a small number of the largest companies
- Since 2022, Russian companies have been permitted not to disclose financial statements due to sanctions risks, due to which the revenue data for a number of major players becoming unavailable. The study calculates the IT market size based on the revenue of the TOP-1000+ companies. For organizations that have ceased disclosure, indicators are determined by expert evaluation using indirect data and industry benchmarks. This approach maintains the accuracy of the assessment, since the Pareto principle operates in the market: more than half of the volume is generated by a limited number of the largest companies (TOP-50). Therefore, expert assumptions do not distort the overall picture and ensure the representativeness of the results
- The study uses a three-level model that ensures a correct distinction between the classical IT market, captive (internal) IT and digital related technology industries. 1. The first level is the classic IT market. Includes companies whose main activities are related to software development, hardware solutions production or IT services provision. This level reveals the market, competitive segment of IT. 2. The second level is additional volume (Offtop) from captive IT companies. Contains IT companies that serve their parent companies. 3. The third level is digital companies in high-tech industries. Includes organizations for which IT is not the core business, but which operate in technology-intensive segments (E-com, FinTech, InsurTech, MedTech, MarTech, etc.) and form the extended contour of the digital economy. This approach ensures transparency of the study boundaries and increases the accuracy of the final estimates

Annexes

In this section we cover the following issues:

- ↳ [Software configuration](#)
 - ↳ [Hardware configuration](#)
 - ↳ [IT services configuration](#)
- 
- A decorative graphic consisting of several overlapping, wavy, light gray bands that curve across the bottom half of the page, creating a sense of depth and movement.

Software configuration Clouds (1/2)

Segment-1	Segment-2	Segment-3
Cloud technologies	Virtual computing tools	Virtual machines (VM)
		Dedicated hosts and Bare Metal Server
		GPU instances
		Virtual desktops and VDI
	Cloud storage	Object storage
		File storage
		Block storage
		Archival storage
		Backup and recovery storage
		Storage for logs and monitoring
	Network	Virtual networks (VPC / VNet)
		Subnets and routing
		Load balancing
		DNS and domain services
		CDN (Content Delivery Network)
		VPN and private connections
		Internet gateways and NAT
		Peering and interconnection
	Network interfaces and IP addresses	
	Data platform	Relational databases (Managed RDBMS)
Non-relational databases (NoSQL)		
Storage key-value		
Document-oriented databases		
Columnar databases		
Interactive analytics and data visualization		
ETL/ELT pipelines with advanced analytics		
Stream-analytics / real-time analytics		
Relational databases (Managed RDBMS)		
Management and monitoring	-	
Managing licenses and subscriptions	-	
Data migration and transfer systems	-	
High availability and fault tolerance systems	-	

Software configuration Clouds (2/2)

Segment-1	Segment-2	Segment-3
Cloud technologies	AI technologies	Model lifecycle management (MLOps)
		Providing ready-made models
		Natural language processing
		Computer vision
		Transfer
		Speech recognition and audio synthesis
		Recommendation services
		Cloud environments for Python/R
		Collaboration on models
		RAG-controlled systems
	Development and deployment environment	Testing services
		Configuration management services
		Container virtualization and orchestration services
		Application deployment services
	Serverless computing	Message queues
		Code as a function
		API gateways
		Ready-made applications in the cloud
		Internet of Things solutions
	Security	Access control
Secrets management		
Firewall and network ACL		
Multi-factor authentication (MFA)		
DDoS and threat protection		
Web Application Firewall		

Software configuration AI

Segment-1	Segment-2	Segment-3	
AI technologies	Model lifecycle management	-	
	AI models	-	
	AI agents	-	
	Computer vision (OCR)		Face recognition
			Semantic segmentation
			Object recognition and detection
			Image classification
			Video stream analysis
	Natural language processing (NLP)		Optical character recognition
			Machine translation
			Speech recognition and synthesis
			Text analysis
			Natural language generation
			Natural language understanding
			Collaboration on models and reports
			Decision-making support systems
			Simulation modeling
			Optimization platforms
Text and content generation			
Code generation and Dev assistants			
Video and animation generation			
Chatbots and virtual assistants			
AI analytics and forecasting			
AI editors and creative assistants			
Recommendation systems			
Robotic Process Automation			

Software configuration Platform software (1/2)

Segment-1	Segment-2	Segment-3
Platform software	Operating Systems	Server operating system
		Customer operating system
		Embedded operating systems
	Virtualization systems	-
	Software-defined storage (SDS)	-
	Software-defined networks (SDN)	-
	Backup and archiving	-
	Addressing and naming systems (DNS)	-
	Directory and authentication systems	-
	Remote access systems	-
	Web, proxy services and load balancing	-
	Network monitoring and management	-
	Configuration management tools	-
	Tools for automating tasks and processes	-
	Performance monitoring and management	-
	Multi-cluster and hybrid management	-
	Infrastructure management as a code	-
	Container virtualization and orchestration systems	-
	Software asset management (SAM)	-
	Monitoring and logging systems	-
	Desktop virtualization (VDI)	-
	Application deployment systems	-
	Virtualization systems	-
	Software-defined storage (SDS)	-
	Software-defined networks (SDN)	-
	Backup and archiving	-
	Addressing and naming systems (DNS)	-
	Directory and authentication systems	-
	Remote access systems	-
	Web, proxy services and load balancing	-
Network monitoring and management	-	

Software configuration Platform software (2/2)

Segment-1	Segment-2	Segment-3
Platform software	Development tools	Testing environment
		Version control systems
		Integrated Development Environments (IDE)
		Software Development Kits and Libraries (SDK)
		Visual interface builders
		Low-code/No-code application development tools
	Telecom software	Content Management System
		Network Management Systems (NMS/OSS)
		Business Support Systems (BSS)

Software configuration IS

Segment-1	Segment-2	Segment-3	
Information security	Endpoint protection for business	-	
	Proactive detection of atypical threats (EDR/XDR)	-	
	Anti-Fraud Systems (AntiFraud)	-	
	Digital certificates	-	
	Access control (tokens)	Identification and access management (IAM) Privileged access management (PAM)	
	Multi-factor authentication	-	
	Encryption gateways / crypto modules	-	
	Intrusion detection and prevention systems (IDS/IPS)	-	
	DDoS and threat protection	-	
	Web Application Firewalls (WAF)	-	
	Network Security		Firewall
			Content Filtering System
			Deep Packet Inspection
			Unified Threat Management (UTM)
	Vulnerability and scanning management	-	
	Security information and event management (SIEM)	-	
	Data Loss Prevention	-	
	Cloud security platforms (CWL/CNAPP)	-	
	Information security incident response systems (IRP/SOAR)	-	
	Digital risk protection solutions (DRP)	-	
	Threat intelligence platforms and services (TIP)	-	
	Mobile device management (MDM) systems	-	
Employee activity monitoring systems	-		
NGFW and FW	-		

Software configuration Data management

Segment-1	Segment-2	Segment-3
Data management	Scientific and analytical software	Statistical and mathematical analysis
		Scientific modeling and simulations
		Data processing and analysis
		Geographic information system
		Laboratory and management software (LIMS)
	Non-relational databases	-
	Relational databases	-
	Interactive analytics and data visualization	-
	Parallel and distributed data processing	-
	Stream processing	-
	Data lakes	-
Data warehouses	-	
ETL/ELT pipelines	-	
Master data management (MDM) systems	-	

Software configuration Other (1/3)

Segment-1	Segment-2	Segment-3
Productivity	Productivity	Corporate messengers
		Postal systems
		Video Conferencing
		Documents and text editors
		Tables
		Presentations and visualizations
		Task management (To Do)
		Calendars and schedules
		Collaborative work with files
		Visual boards
		Web browsers
		VoIP and telephony
	Project and task management systems	-
ERP, bookkeeping and accounting	Enterprise resource planning (ERP) system	-
	Governance, risk, and compliance systems	-
	Accounting and Taxation Software	-
	Financial and Managerial Accounting Software	-
	Billing systems	-
Payment systems	-	-
Business management	Legal Software	eDiscovery/forensics
		Legal Information Systems
	Legal Software	-
	Enterprise Asset Management (EAM) systems	-
	BPM-Systems	-
	IT service management (ITSM)	-
	Electronic Document Management (EDM)	-

Software configuration Other (2/3)

Segment-1	Segment-2	Segment-3
Software for manufacturing industry	Manufacturing and logistics	Real-time manufacturing execution systems (MES)
		Warehouse management systems (WMS)
		Supply chain management SCM
		Material requirements planning (MRP)
		Automated process control system
		Dispatch systems
		IoT device management
		Maintenance and repair management
Collaboration with customers	Multimedia and content production	Graphic editors
		3D modeling and animation
		Video editing and post-production
		Video broadcasting
		Working with audio
		Media content management (DAM)
	Marketing software	Online reputation management (SERM/ORM)
		Advertising platforms and campaign management
		Lead generation and data capture platforms
		Survey software
		Intelligent pricing systems
	Electronic procurement	Marketing resource management system (MRM)
		Customer relationship management systems (CRM)
Software for manufacturing industry	Engineering Software	Computer-aided design systems (CAD)
		Computer-aided manufacturing systems (CAM)
		Computer-aided engineering analysis systems (CAE)
		Product lifecycle management PLM/PDM
		BIM design software

Software configuration Other (3/3)

Segment-1	Segment-2	Segment-3
Working with personnel and knowledge	Educational software	Testing and assessment of knowledge
		Software for special educational needs
		Learning management systems (LMS)
	HR software	HR management
		Recruitment automation
		Electronic HR document management
	Enterprise content management	-

Hardware configuration

Segment-1	Segment-2
Servers	Rack servers
	Blade servers
	Tower servers
	Edge servers
AI equipment	HPC servers
	GPU servers
	InfiniBand switches
Data storage systems	DAS (Direct Attached Storage)
	NAS (Network Attached Storage)
	SAN (Storage Area Network)
	Unified Storage
	Object Storage
Network equipment	Switches
	Routers
	Wireless equipment
	Control and monitoring equipment
	Load balancers
	Specialized network equipment
	IP Telephony / Video Conferencing
Security	NGFW and FW
	VPN gateways
	IDS/IPS
	Network TAP
	Encryption gateways / crypto modules
	Video surveillance systems
	Access control systems
Engineering equipment for data centers	Electricity and energy supply
	Cooling and climate control systems
	Racks, cabinets and mounting hardware

IT services configuration

Segment-1	Segment-2	Segment-3
Colocation	-	-
System integration	Integration of applications and platforms	-
	Data integration	-
	Business process integration	-
	Infrastructure integration and DevOps	-
Outsourcing	Service desk outsourcing	-
	Infrastructure outsourcing	-
	Business process outsourcing	-
Software development	Web development	-
	Mobile development	-
	Desktop application development	-
	Embedded systems development	-
Information security	MSSP	Security event monitoring and analysis (SOC as a Service)
		Incident response
		Management of protective equipment
		Vulnerability management
		Cyber intelligence
		Reporting and consulting
	Information security and compliance audit and consulting	-
	Design, implementation and supply of protective equipment	-
	Penetration testing	-
	Organizational measures and documentation	-
Staff training and awareness raising	-	
Support for cybersecurity systems	-	
AI services	Development of AI/ML-based solutions	-
	Integration of AI/ML-based solutions	-
	AI/ML and data analytics consulting	-
Consulting	Strategic IT consulting	-
	IT Audit	-
	Organizational and process consulting	-

Products

MTS WEB SERVICES

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MWS products

Cloud Infrastructure

MWS Cloud Platform

A proprietary cloud platform built on MTS robust infrastructure



AI cloud

Cloud accelerators for high-load computing and machine learning



Artificial Intelligence

MWS GPT

A platform for managing large language models and integrating them into business processes



MWS Copilot

A large language model for business



MWS Kodify

AI Assistant for developers



MWS products

Data and Integration

MWS Data

A unified data and AI management platform for making management and business decisions



MWS Octapi

Integration platform with AI-assistant



Business applications

MWS Tables

No-Code platform for collaboration and business process automation based on spreadsheets



MWS TeamStream

Screen recording and video messaging service with AI



MWS products

Data and Integration

MWS Container Platform

Managing applications and infrastructure based on Kubernetes. Everything for Dev and Ops in-one product



MWS DevRails

A platform for efficient digital product development based on AI



On-premises

Hybrid and on-premises infrastructure based on partner products from market leaders



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Cloud services and Enterprise-level products for AI-experiments and digital transformation of business. The company offers advanced technologies, in-depth expert review, comprehensive support and reliable infrastructure to help customers reach new heights. MWS solutions include computing and storage services, infrastructure for training AI and ML models, databases, business applications, network services, and developer solutions

MWS Intelligence Team

The team is responsible for leadership in analytics and research in the Russian cloud market. We aggregate the best global and Russian practices in the field of clouds, artificial intelligence, cybersecurity and information technology in general

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