Third Annual Survey on Russian Export Software Market

Description: This survey deals with Russian export software market.

The survey report reflects the dynamics of the export software market, marks out growing regional centers of software development, and examines main external markets of Russian companies. It also contains data on volume and structure of software exports. Great attention is paid to the role of Russian IT companies and software specialists on the international market. A sizeable part also concerns analysis of existing problems mentioned by respondents, such as the workforce problem and the problem of government regulation in the field of software exports. Individual chapters cover aspects of quality assurance certification of Russian companies and salaries in the field.

The in-depth survey is being done for the third year running. An attempt to define base indicators that characterize the state of the sector was undertaken earlier, in 2004. However, in that survey only individual questions regarding the Russian software export industry were studied, and a general picture of sectoral development could not be drawn due to the fragmentary nature of the information obtained and the lack of a unified methodology.

The reliability of the results obtained by this year’s survey is guaranteed by the continuity of analytical methodology and by use of our continually updated database on companies working in the industry. It is important from the standpoint of data comparison and determining dynamics that methodology should not change fundamentally from year to year. It can be developed and improved mainly by adding new questions when surveying developers, and by correcting the way in which questions are formulated. Besides, additional sources of information and ways of checking the reliability of this information can be employed.

Some sections of this year’s survey have been widened. For example, more space has been given to geographical distribution of developers’ activities and territorial expansion, as it is important to understand which regions can expect software industry growth in the foreseeable future. By comparison, last year’s survey limited itself to just statistics on head-office locations.

The report contains 50 pages of text with 49 diagrams and 17 tables showing the situation in different aspects of the market. It covers the general situation and estimates total software exports from Russia. There are also four subject interviews from managers of leading Russian companies and 133 profiles of participating companies.

The report is intended to help those who wish to understand the realities, opportunities and challenges to be found in Russia while looking for software development and engineering services or for new solutions and products.

Methodology

The main results of the survey were obtained based on a poll of companies and organizations in the Russian software export industry (other countries of the former Soviet Union - primarily Ukraine and Byelorussia - were not analyzed). Questionnaires were sent out to companies on the Association's contact database, which is the largest of its type in Russia, accounting for roughly 80% of all legal entities currently involved in exports of software products and software-development services. It includes data on all major exporters.

Our database includes about 1,500 companies and organizations that develop software and software support, of which at least 1,000 are exporters. These companies and organizations were potential respondents in our survey. This year, 115 completed questionnaires were returned, which makes the sample 11.5% of the mooted total number of exporters; this is quite a high indicator.

There is reason to believe that this sample reflects the general situation for most of the issues studied. In any case, dividing the companies that answered into groups based on certain criteria gives similar results to those for the whole of the sector. For example, location of head office is almost identical in the sample and the sector as a whole.
Contents:
- Introduction
- Methodology
- Structure of respondent exporters
- Software export dynamics
- Location of head and local offices
- Foreign markets
- Foreign attitudes to Russia and Russian developers
  -- Company Recognition
  -- Students’ achievements
  -- Collaboration with global leaders
  -- Reputation in professional circles
- Basic sectoral development trends, major concerns and challenges
- Main areas of activity for exporter companies
- Satisfaction ratings with current legal environment and State support
- Labor resources and reserves
  -- HR situation
  -- Salaries
- State support for international marketing activity
- Quality management certification system
- Operating systems, database servers, and programming languages
- Main conclusions

Appendix #1: Diagrams & Tables
Diagrams:
- Distribution of respondents by number of employees.
- Distribution of respondents by gross turnover.
- Distribution of respondents by share of export income in total earnings.
- Sources of export income by production type.
- Distribution of total exports by type of producer.
- Distribution of respondent exporters by location.
- Distribution of headquarters by country and region.
- Presence of branches in CIS countries.
- Significance of foreign markets for Russian exporters.
- Sectoral orientation of exporter companies.
- Distribution of answers regarding major development trends by number of employees in the company.
- Distribution of answers regarding major development trends by share of exports in turnover.
- Distribution of answers on major tendencies by geographical location.
- Distribution of answers regarding main activity areas by geographical location.
- Distribution of answers regarding activity areas by number of employees.
- Distribution of answers on activity areas by share of export in turnover.
- Assessment of state support for the sector over the past three years.
- Assessment of state support by number of employees.
- Assessment of state support by company location.
- Assessment of property rights situation over the past three years.
- Assessment of property rights protection by company location.
- Tax system assessment.
- Tax system assessment by number of employees.
- Priority measures for state support of software exports.
- Assessment of handling of bureaucratic and administrative barriers to export.
- Assessment of handling of bureaucratic and administrative barriers by number of employees.
- Assessment of handling of bureaucratic and administrative problems by company location.
- Assessment of current infrastructure (IT parks).
- Assessment of personnel availability, educational system.
- Assessment of current infrastructure (IT parks) by company location.
- Assessment of financial support for start-ups (IT funds).
- Assessment of financial support for IT start-ups by company location.
- Assessment of the personnel market by number of employees.
- Assessment of the personnel market and education system by share of export in turnover.
- Assessment of the personnel market and education system by company location.
- Average salary by city.
Average salary by number of employees.
Average salary by share of export in total turnover.
Assessment of state marketing support by company location
Quality management certification.
Distribution of quality management systems by standard.
OS used by developers.
Use of operating system by company turnover.
Operating systems used to develop products and solutions.
Main database servers.
Database server usage by company size.
Main programming languages.

Tables:

Distribution of survey respondents and all software export companies by location.
Distribution of respondents by number of employees.
Distribution of respondents by gross turnover.
Distribution of respondents by share of export income in total earnings.
Sources of export income by production type.
Anticipated export income growth rates by size of company.
Distribution of respondent exporters by location.
Distribution of headquarters by country and region.
Presence of branches in CIS countries.
Branch presence in Russia.
Foreign companies’ research and development centers.
Main trends in software development for export.
Rating of main areas of activity.
Assessment of state support by company turnover.
Average cost of development man-hour by number of employees.
Certification by personnel numbers, no. of companies.
Certification plans.

Appendix #2: Respondents
Interviews: BEITEN BURKHARDT, Inteks, LANIT-TERCOM, SmartSoftware

Ordering:
Order Online - http://www.researchandmarkets.com/reports/342799/
Order by Fax - using the form below
Order by Post - print the order form below and send to

Research and Markets,
Guinness Centre,
Taylors Lane,
Dublin 8,
Ireland.
Fax Order Form
To place an order via fax simply print this form, fill in the information below and fax the completed form to 646-607-1907 (from USA) or +353-1-481-1716 (from Rest of World). If you have any questions please visit http://www.researchandmarkets.com/contact/

Order Information
Please verify that the product information is correct.

Product Name: Third Annual Survey on Russian Export Software Market
Web Address: http://www.researchandmarkets.com/reports/342799/
Office Code: SCD2ZHSC

Product Format
Please select the product format and quantity you require:

<table>
<thead>
<tr>
<th>Quantity</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Electronic -</td>
<td>USD 572</td>
</tr>
<tr>
<td>Single User:</td>
<td>USD 572</td>
</tr>
</tbody>
</table>

Contact Information
Please enter all the information below in BLOCK CAPITALS

Title: [ ] Mr  [ ] Mrs  [ ] Dr  [ ] Miss  [ ] Ms  [ ] Prof
First Name: ___________________________  Last Name: ___________________________
Email Address: * ___________________________
Job Title: ___________________________
Organisation: ___________________________
Address: ___________________________
City: ___________________________
Postal / Zip Code: ___________________________
Country: ___________________________
Phone Number: ___________________________
Fax Number: ___________________________

* Please refrain from using free email accounts when ordering (e.g. Yahoo, Hotmail, AOL)
Payment Information

Please indicate the payment method you would like to use by selecting the appropriate box.

☐ Pay by credit card: You will receive an email with a link to a secure webpage to enter your credit card details.

☐ Pay by check: Please post the check, accompanied by this form, to:
Research and Markets,
Guinness Center,
Taylors Lane,
Dublin 8,
Ireland.

☐ Pay by wire transfer: Please transfer funds to:
Account number 833 130 83
Sort code 98-53-30
Swift code ULSBIE2D
IBAN number IE78ULSB98533083313083
Bank Address Ulster Bank,
27-35 Main Street,
Blackrock,
Co. Dublin,
Ireland.

If you have a Marketing Code please enter it below:

Marketing Code: ________________________________

Please note that by ordering from Research and Markets you are agreeing to our Terms and Conditions at http://www.researchandmarkets.com/info/terms.asp

Please fax this form to:
(646) 607-1907 or (646) 964-6609 - From USA
+353-1-481-1716 or +353-1-653-1571 - From Rest of World