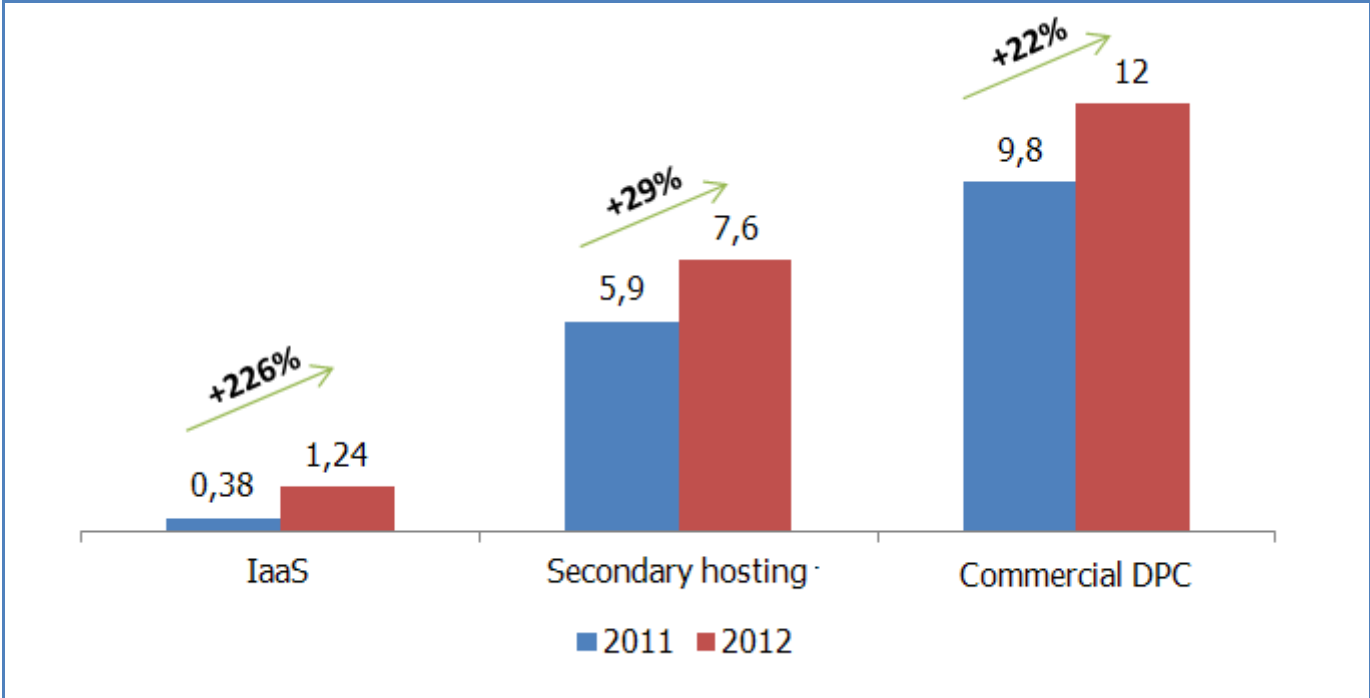




J'son & Partners Consulting company presents the results of the research of **Russian market of cloud IaaS solutions**.

Infrastructure-as-a-Service (IaaS) is the automatic or on demand provision of data-center infrastructure elements (processing capacity, storage, network settings) and network resources (bandwidth reservations, VPN, etc.) supporting corporate-class SLA¹ by availability parameters, performance and security. IaaS services are designed to replace and supplement secondary hosting services and commercial data processing center (DPC) services.

Fig. 1. Comparison of market size of IaaS , commercial DPC and secondary hosting in Russia, 2011 – 2012, billion RUB



Source: J'son & Partners Consulting

According to J'son & Partners Consulting, for 2012 IaaS market grew by 226%, while annual growth rate of secondary hosting market and commercial DPC did not exceed 30%.

¹ Service Level Agreement – agreement on the level of service provided
 Copyright © 2013, J'son & Partners Consulting. Media can use any text, diagrams and data contained in this market review only with giving credit to the source of information – J'son & Partners Consulting.
 ™ J'son & Partners [registered trade mark].

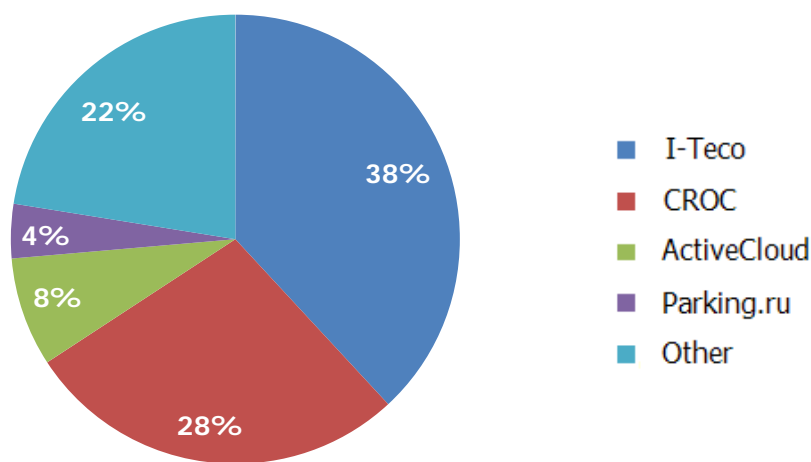
Such high growth indicates growing demand on IaaS services on the Russian market. It also shows that more and more companies switch to the cloud infrastructure.

As at the end of 2012 11 large players provided IaaS services on the Russian market: ActiveCloud, Clodo, Cloud One, CROC, Parking.ru (Inoventica group), Selectel, I-Teco, Oversun, Skalaxy, Cloud4Y, Dataline.

CloudGate (Skalaxy) has stopped to provide IaaS services starting from the 1st of August 2013.

In 2012 I-Teco was the leader by the revenues² received from the provision of IaaS services. The company was followed by CROC (it was the leader by revenue in 2011). Both companies work with large business. Third and fourth places are occupied by ActiveCloud and Parking.ru (Inoventica group) correspondingly.

Fig. 2. Top 4 players of the Russian IaaS market by revenues (excluding Dataline), 2012



Source: J'son & Partners Consulting

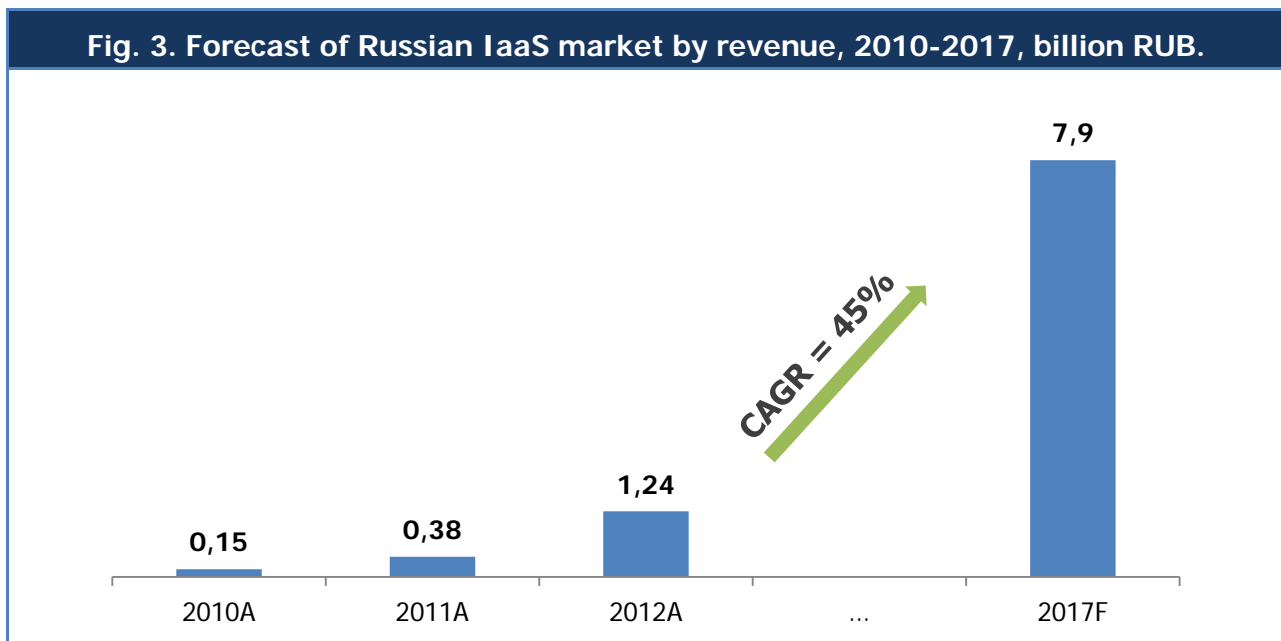
According to J'son & Partners Consulting, the most massive penetration of IaaS services in January 2013 was in Saint Petersburg. It comprised 4%. Moscow was on the second place where penetration amounted to 3,8%. Penetration of IaaS services in all the other large Russian cities comprised less or 1%.

²excluding Dataline

Copyright © 2013, J'son & Partners Consulting. Media can use any text, diagrams and data contained in this market review only with giving credit to the source of information – J'son & Partners Consulting.

™ J'son & Partners [registered trade mark].

According to J'son & Partners estimates, IaaS market in 2012 amounted to 1,24 billion RUB. It exceeds 3 times the same indicator for 2011.



Source: J'son & Partners Consulting

Cloud IaaS services market becomes more and more popular in Russia. According to J'son & Partners Consulting, by 2017 the market will reach not less than 8 billion rubles, at the same time average annual growth rate for the period of 2012 – 2017 will comprise 45%.

Drivers and barriers

At the current moment, cloud services market shows significant growth. Even with the current level of functionality of the services the market is far from saturation. As a result, according to J'son & Partners Consulting, the speed of development of this market will not significantly correlate with changes/improvements in the quality and functionality of cloud services.

Survey of potential users showed that many still do not trust cloud services. For example, potential users of cloud services in Russia do not completely understand payment and billing methods, they still do not fully trust the technology, have lack of confidence in the security of information. Dependence on Internet access and particular provider also act as strong barriers. These barriers may become less significant with the improvement of services, emergence of large volumes of information and a greater number of qualified professionals.

Reduction in the price for cloud services may become a significant factor in the market growth. However, when comparing the cost of use of cloud services with non-cloud (classical) ones the use of the last often is more cost effective for the company³. The market will more likely grow thanks to the emergence of new services that are not yet presented on the Russian market rather than because of improvement of functional of existing services.

³at the moment of the research conduct

Copyright © 2013, J'son & Partners Consulting. Media can use any text, diagrams and data contained in this market review only with giving credit to the source of information – J'son & Partners Consulting.

™ J'son & Partners [registered trade mark].

Content of the full version of the report 'Estimation of the current XaaS-services market in Russia' (220 pages)

1. Summary

2. Introduction

3. Analysis of Russian markets of technologies preceding and competing with SaaS technologies

- 3.1. Market of replicable corporate software in Russia and forecast of market development
- 3.2. Review of different segments of replicable corporate software in Russia
 - 3.2.1. Security/antiviruses
 - 3.2.2. CRM
 - 3.2.3. ERP
 - 3.2.4. Communication
 - 3.2.5. Office
- 3.3. Factors and barriers of market development

4. Analyses of Russian market of services preceeding and competing with IaaS and PaaS services

- 4.1. Market of IT-outsourcing and system integration
- 4.2. Russian DPC market
- 4.3. Russian DPC market supply
 - 4.3.1. Forecast of market development
 - 4.3.2. Competition of DPC market
- 4.4. Secondary DPC market: size and structure by services
 - 4.4.1. Level of demand on services
 - 4.4.2. Main user segments of services
- 4.5. Factors and barriers of service market development
 - 4.5.1. Competition with western companies
 - 4.5.2. Competition with own DPCs
- 4.6. Security as a limiting factor

5. Analyses of activities of Russian players of cloud services market

- 5.1. Comparison of business models of Russian operators of cloud services
 - 5.1.1. SaaS market
 - 5.1.2. IaaS market
 - 5.1.3. PaaS market
- 5.2. Russian 'cloud' services market: 'upper' estimate
 - 5.2.1. SaaS market

5.2.2. IaaS market

5.2.3. PaaS market

6. Survey results of Russian existing and potential users of XaaS class services

6.1. Description of sampling population

6.2. Use of primary and secondary DPC services

6.3. Attitude towards XaaS class services

6.3.1. Information level on cloud services and use of services

6.3.2. Necessary changes

6.4. Characteristics of cloud services users

6.4.1. Attitude towards cloud services

7. Conclusion

8. Annex

List of tables

Table 1. Revenues by key players of IT-outsourcing market

Table 2. Growth dynamics in effective area of commercial DPC, 2007 - 2011, square meters

Table 3. Forecast of market development of commercial DPC in Russia, billion rubles, 2012-2016

Table 4. Cost of channels rent services in Russia and in Moscow, 2011-2016

Table 5. Largest operators of commercial DPC by total area of halls put into use

Table 6. Comparison of tariffs of cloud providers with competing services

Table 7. Tariffs for use of 1C Fresh (license lease)

Table 8. Comparison of tariffs of main distributors of Microsoft Office 365, June 2013

Table 9. Comparison of parameters available for customization on order of IaaS services

Table 10. Possible alternatives of payment period, Clodo

Table 11. Dependence of prices from RAM size (size equaling HDD 10 GB), Clodo

Table 12. Tariffication of corporate cloud Oversun

Table 13. Rent cost of Selectel virtual linux-server

Table 14. Rent cost of Selectel virtual windows-server

Table 15. Rent cost of Selectel 'cloud' server

Table 16. Tariffs on 'Cloud hosting CloudServer' services

Table 17. Additional resources for 'Cloud hosting CloudServer' services

Table 18. Cloud One tariff plans

Table 19. Cloud services billing, Parking.ru (Inoventica group)

Table 20. Corporate cloud billing, Cloud4Y

Table 21. Cloud applications billing, Cloud4Y

Table 22. Price for standard slot for Xen, Skalaxy

Table 23. Disc space price, Skalaxy

Table 24. License price for Windows, Skalary

Table 25. Expansion packages billing, Skalary

Table 26. Billing by number of applications transferred for maintenance, Skalary

Table 27. Resources billing in DataLine cloud (Pay As You Go)

Table 28. Resources billing in DataLine cloud (Location Pool)

Table 29. VDI billing

Table 30. Tariffs of Rusonyx distributor on Jelastic service, June 2013

Table 31. Tariffs on Google App Engine service on the official website, June 2013

Table 32. Tariffs of the sole Rusonyx distributor on Jelastic, June 2013

Table 33. Tariffs on Google App Engine service on the official website, June 2013

Table 34. Revenues and market share of Russian SaaS market players, 2012

Table 35. Estimation of share of foreign IaaS providers on Russian market, 2012

Table 36. Structure and sample size of survey of legal entities on XaaS cloud services, January 2013

List of illustrations

Fig. 1. Turnover structure of Russian XaaS market, 2012

Fig. 2. Turnover structure of Russian XaaS market, billion rubles, 2012

Fig. 3. Russian SaaS market turnover according to J'son & Partners Consulting and NIST methodology, mln. rubles, 2012

Fig. 4. Forecast of the size of the Russian SaaS market, 2012-2017, billion rubles

Fig. 5. Top-10 players of the Russian IaaS market by revenues, mln. rubles, 2012

Fig. 6. Forecast of the size of the Russian IaaS market, 2010-2017, billion rubles

Fig. 7. Forecast of the size of the Russian PaaS market, 2012-2017, billion rubles

Fig. 8. Market size of replicable software in Russia, 2006-2012, billion rubles

Fig. 9. Sphere of activity of company purchasing software, 2011

Fig. 10. Sale volume on the market of antivirus protection in Russia, billion rubles, 2010-2012

Fig. 11. Shares of main players of antivirus protection market in Russia, 2010-2011

Fig. 12. Revenue of system integrators on CRM market in Russia, billion rubles, 2010-2012

Fig. 13. Scheme of ERP system

Fig. 14. Size of ERP market in Russia, billion rubles, 2010-2012

Fig. 15. Shares of vendors by number of implementation projects (systems, projects) taking into consideration partners, 2012

Fig. 16. Main barriers for demand on XaaS services in Russia, January 2013

Fig. 18. Top-10 companies mentioned as competitors on IT-outsourcing market

Fig. 19. Size of IT-market in Russia, billion rubles

Fig. 20. Growth rates of commercial DPC market in real terms by regions, 2008-2011, %

Fig. 21. Geographical distribution of commercial DPC, 2011

- Fig. 22. Supply-demand structure on DPC in USA, 1993-2011, mln. sq. m.*
- Fig. 23. Russian market of secondary hosting, billion rubles, 2010-2016*
- Fig. 24. Russian hosting market by number of domains, thousand units, 2009 – April 2013*
- Fig. 25. Top-8 player on the secondary hosting market in Russia by number of domains under service, thousand units*
- Fig. 26. Shares of Top 8 hosters by number of domains under service, units*
- Fig. 27. Share of Hosting Community Holding on the secondary hosting market by number of domains under service, thousand units*
- Fig. 28. Structure of Russian market of secondary hosting by consumer segments, 2011*
- Fig. 29. Distribution of responsibilities for security*
- Fig. 30. Turnover structure of Russian XaaS market, 2012*
- Fig. 31. Turnover structure of Russian XaaS market, billion rubles, 2012*
- Fig. 32. Russian SaaS market turnover according to J'son & Partners Consulting and NIST methodology, mln. rubles, 2012*
- Fig. 33. Turnover structure of Russian SaaS market by players, 2012*
- Fig. 34. Turnover structure of Russian SaaS market by sale methods, 2012*
- Fig. 35. Number of clients of various SaaS services in Russia, mln., 2012 (logarithmic scale)*
- Fig. 36. Top-10 cities of Russian SaaS market by number of clients, January 2013*
- Fig. 37. Forecast of the size of the Russian SaaS market, 2012-2017, billion rubles*
- Fig. 38. SaaS service penetration in Russia, January 2013*
- Fig. 39. Top-10 players of Russian IaaS market by revenue, mln. rubles, 2012*
- Fig. 40. Top-10 cities of Russian IaaS market by revenue, mln. rubles, 2012*
- Fig. 41. Top-10 players of Russian IaaS market by share, number of clients, 2012*
- Fig. 42. Top-11 players of Russian IaaS market by number of clients, 2012*
- Fig. 43. Top-10 cities of Russian IaaS market by number of clients, 2012*
- Fig. 44. Forecast of the size of the Russian IaaS market, 2010-2017, billion rubles*
- Fig. 45. IaaS service penetration in Russia, January 2013*
- Fig. 46. Top-3 players of Russian IaaS market by revenue, mln. rubles, 2012*
- Fig. 47. Turnover structure of Russian PaaS market by players, 2012*
- Fig. 48. IaaS service penetration in Russia depending on the size of the company, 2012*
- Fig. 49. Forecast of the size of the Russian PaaS market, 2012-2017, billion rubles*
- Fig. 50. Forecast of the penetration of cloud services in Moscow, January 2013*
- Fig. 51. Forecast of the penetration of cloud services in Saint-Petersburg, January 2013*
- Fig. 52. Forecast of the penetration of cloud services in Nizhny Novgorod, January 2013*
- Fig. 53. Forecast of the penetration of cloud services in Volgograd, January 2013*
- Fig. 54. Forecast of the penetration of cloud services in Krasnodar, January 2013*
- Fig. 55. Forecast of the penetration of cloud services in Yekaterinburg, January 2013*
- Fig. 56. Forecast of the penetration of cloud services in Perm, January 2013*

Fig. 57. Forecast of the penetration of cloud services in Novosibirsk, January 2013

Fig. 58. Forecast of the penetration of cloud services in Krasnoyarsk, January 2013

Fig. 59. Forecast of the penetration of cloud services in Vladivostok, January 2013

Fig. 60. Main demand barriers on XaaS services in Moscow, January 2013

Fig. 61. Main demand barriers on XaaS services in Saint-Petersburg, January 2013

Fig. 62. Main demand barriers on XaaS services in Novosibirsk, January 2013

Fig. 63. Main demand barriers on XaaS services in Vladivostok, January 2013

Fig. 64. Main demand barriers on XaaS services in Yekaterinburg, January 2013

Fig. 65. Main demand barriers on XaaS services in Nizhny Novgorod, January 2013

Fig. 66. Main demand barriers on XaaS services in Volgograd, January 2013

Fig. 67. Main demand barriers on XaaS services in Perm, January 2013

Fig. 68. Main demand barriers on XaaS services in Krasnodar, January 2013

Fig. 69. Main demand barriers on XaaS services in Krasnoyarsk, January 2013

Fig. 70. Popularity of SaaS service brands in Moscow, %, June 2013

Fig. 71. Popularity of PaaS service brands in Moscow, %, June 2013

Fig. 72. Popularity of IaaS service brands in Moscow, %, June 2013

Fig. 73. Popularity of SaaS service brands in Saint-Petersburg, %, June 2013

Fig. 74. Popularity of PaaS service brands in Saint-Petersburg, %, June 2013

Fig. 75. Popularity of IaaS service brands in Saint-Petersburg, %, June 2013

Fig. 76. Popularity of SaaS service brands in Novosibirsk, %, June 2013

Fig. 77. Popularity of PaaS service brands in Novosibirsk, %, June 2013

Fig. 78. Popularity of IaaS service brands in Novosibirsk, %, June 2013

Fig. 79. Popularity of SaaS service brands in Vladivostok, %, June 2013

Fig. 80. Popularity of PaaS service brands in Vladivostok, %, June 2013

Fig. 81. Popularity of IaaS service brands in Vladivostok, %, June 2013

Fig. 82. Popularity of SaaS service brands in Yekaterinburg, %, June 2013

Fig. 83. Popularity of PaaS service brands in Yekaterinburg, %, June 2013

Fig. 84. Popularity of IaaS service brands in Yekaterinburg, %, June 2013

Fig. 85. Popularity of SaaS service brands in Nizhny Novgorod, %, June 2013

Fig. 86. Popularity of PaaS service brands in Nizhny Novgorod, %, June 2013

Fig. 87. Popularity of IaaS service brands in Nizhny Novgorod, %, June 2013

Fig. 88. Popularity of SaaS service brands in Volgograd, %, June 2013

Fig. 89. Popularity of PaaS service brands in Volgograd, %, June 2013

Fig. 90. Popularity of IaaS service brands in Volgograd, %, June 2013

Fig. 91. Popularity of SaaS service brands in Perm, %, June 2013

Fig. 92. Popularity of PaaS service brands in Perm, %, June 2013

Fig. 93. Popularity of IaaS service brands in Perm, %, June 2013

Fig. 94. Popularity of SaaS service brands in Krasnodar, %, June 2013

Fig. 95. Popularity of PaaS service brands in Krasnodar, %, June 2013

Fig. 96. Popularity of IaaS service brands in Krasnodar, %, June 2013

Fig. 97. Popularity of SaaS service brands in Krasnoyarsk, %, June 2013

Fig. 98. Popularity of PaaS service brands in Krasnoyarsk, %, June 2013

Fig. 99. Popularity of IaaS service brands in Krasnoyarsk, %, June 2013

Fig. 100. Penetration of different types of services among SaaS users in Moscow, January 2013

Fig. 101. Penetration of different types of services among SaaS users in Saint-Petersburg, January 2013

Fig. 102. Penetration of different types of services among SaaS users in Nizhny Novgorod, January 2013

Fig. 103. Penetration of different types of services among SaaS users in Volgograd, January 2013

Fig. 104. Penetration of different types of services among SaaS users in Krasnodar, January 2013

Fig. 105. Penetration of different types of services among SaaS users in Yekaterinburg, January 2013

Fig. 106. Penetration of different types of services among SaaS users in Perm, January 2013

Fig. 107. Penetration of different types of services among SaaS users in Yekaterinburg, January 2013

Fig. 108. Penetration of different types of services among SaaS users in Yekaterinburg, January 2013

Illustration 109. Penetration of different types of services among SaaS users in Vladivostok, January 2013

Fig. 110. Satisfaction and loyalty of current and potential XaaS users in Moscow, January 2013

Fig. 111. Satisfaction and loyalty of current and potential XaaS users in Saint-Petersburg, January 2013

Fig. 112. Satisfaction and loyalty of current and potential XaaS users in Novosibirsk, January 2013

Fig. 113. Satisfaction and loyalty of current and potential XaaS users in Vladivostok, January 2013

Fig. 114. Satisfaction and loyalty of current and potential XaaS users in Yekaterinburg, January 2013

Fig. 115. Satisfaction and loyalty of current and potential XaaS users in Nizhny Novgorod, January 2013

Fig. 116. Satisfaction and loyalty of current and potential XaaS users in Volgograd, January 2013

Fig. 117. Satisfaction and loyalty of current and potential XaaS users in Perm, January 2013

Fig. 118. Satisfaction and loyalty of current and potential XaaS users in Krasnodar, January 2013

Fig. 119. Satisfaction and loyalty of current and potential XaaS users in Krasnoyarsk, January 2013

Fig. 120. Reasons to refuse to use XaaS services in Russia, January 2013

Fig. 121. Penetration of cloud services in Moscow, January 2013

Fig. 122. Penetration of cloud services in Saint-Petersburg, January 2013

Fig. 123. Penetration of cloud services in Nizhny Novgorod, January 2013

Fig. 124. Penetration of cloud services in Volgograd, January 2013

Fig. 125. Penetration of cloud services in Krasnodar, January 2013

Fig. 126. Penetration of cloud services in Yekaterinburg, January 2013

Fig. 127. Penetration of cloud services in Perm, January 2013

Fig. 128. Penetration of cloud services in Novosibirsk, January 2013

Fig. 129. Penetration of cloud services in Krasnoyarsk, January 2013

Fig. 130. Penetration of cloud services in Vladivostok, January 2013

Fig. 131. Turnover structure of Russian XaaS market, 2012

Fig. 132. Turnover structure of Russian XaaS market, billion rubles, 2012

Fig. 133. Forecast of the size of the Russian SaaS market, 2012-2017, billion rubles

Fig. 134. Top-10 players of the Russian IaaS market by revenues, mln. rubles, 2012

Fig. 135. Forecast of the size of the Russian IaaS market, 2010-2017, billion rubles

Fig. 136. Forecast of the size of the Russian PaaS market, 2012-2017, billion rubles

The newsletter was prepared by the J'son & Partners Consulting Company. We exert every effort to provide actual and forecasting data representing the situation in full and available at the time of the publication of the material. J'son & Partners Consulting reserves the right of revising the data after publication of some new official information by individual players.

Please contact us for additional information:

Pavel Yermolich
Commercial Director

Pavel@json.ru

Find more on



www.json.ru