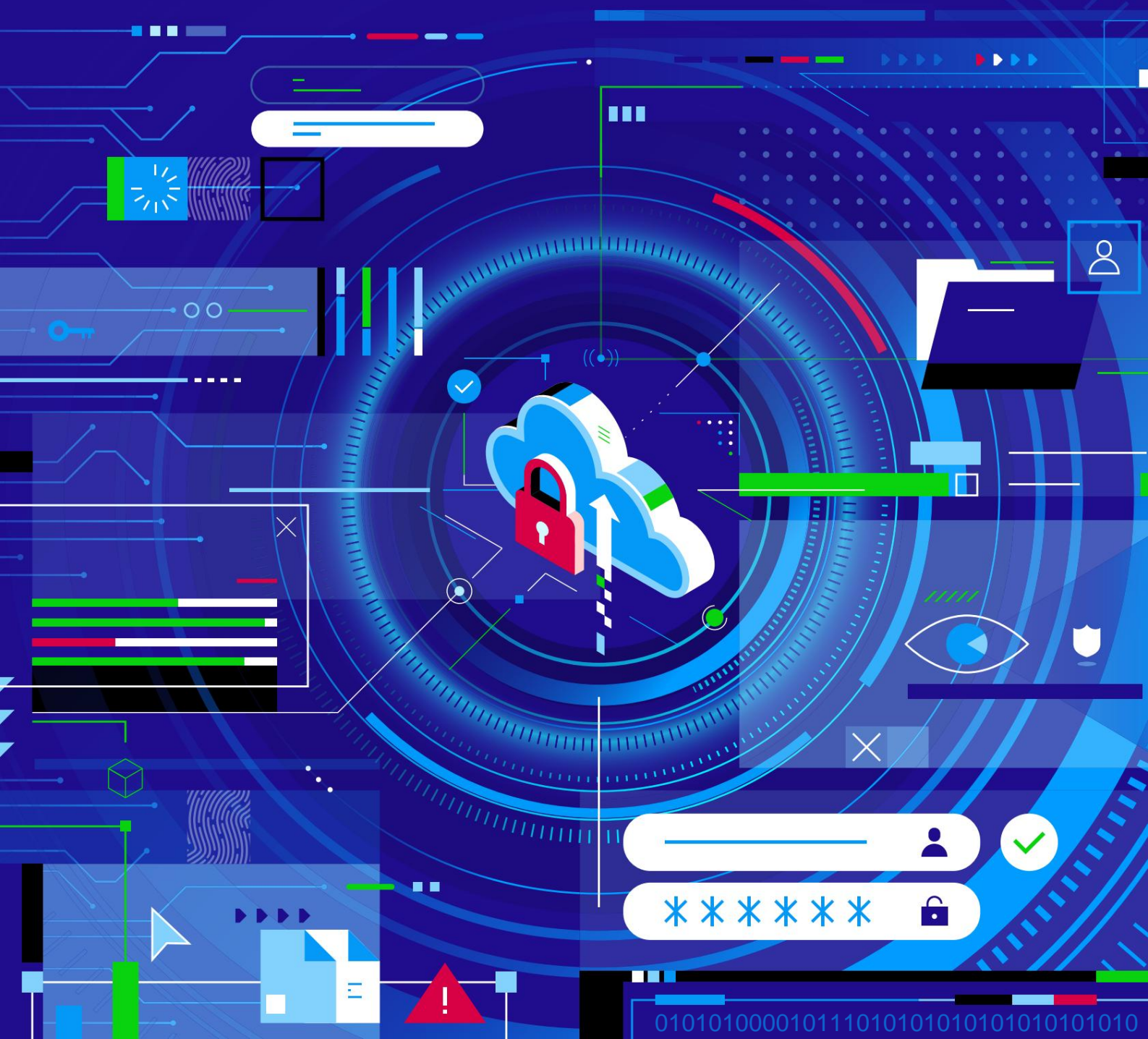


# Forecast of the development of the cyber security market in the Russian Federation for 2023-

July 2023





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<https://ict.moscow/research/issledovanie-rynka-informatsionnoi-bezopasnosti-v-rossii-po-klientskim-segmentam/>

**Table 1. Decomposition of categories of information security tools**

[illegible]

**2** Data taken from various sources, including from the official reporting of companies, procurement data platforms and other sources on the rights of anonymity. When evaluating, the data were considered as per vendors. xxx y yy integratoram, xxxxxxxxxxxx xxxxxx. It was learned that the vendor's revenue is not necessarily equal to his xxxxxxxxxxxx yy xxxxx y xxxxx y xxxxxxxxxxxx xxxxxx xxxxxxxxxxxx/integrator.

The chart displays the distribution of vendors in the IT market for two years. In 2022, Russian vendors held a 70% share, while foreign vendors held a 30% share. In 2021, the shares were 61% for Russian vendors and 39% for foreign vendors. The bars are stacked, with Russian vendors in blue and foreign vendors in red.

Year	Russian vendors	Foreign vendors
2022	70%	30%
2021	61%	39%

1. Kaspersky Lab	11. Яндекс-йӧ	22. DrWeb
2. Positive Technologies	12. IBM	23. ESET
3. BI. ZONE	13. Active-Soft	24. Rvision
4. Check Point Software Technologies	14. UserGate	25. Micro Focus
5. Rostelecom-Solar3	15. SearchInform	26. Языки программирования-яӧ
6. InfoTeX	16. FACCT	27. йӧ «Языки программирования»
7. Cisco	17. Palo Alto Networks	28. CyberArk
8. Fortinet	18. Infowatch	29. Aladdin R.D.
9. Security code	19. Central Bank	30. Qrator Labs
10. Krypto-Pro	20. S-Terra	31. Trend Micro
	21. Garda Technologies	32. Trellix

**3** The data of several related legal entities, united within the framework of one name, were considered.

The leaders of the ÿÿÿ market with a noticeable gap are Kaspersky Laboratory and Positive Technologies.

Figure 3. Shares of security vendors in the market by results of 2022

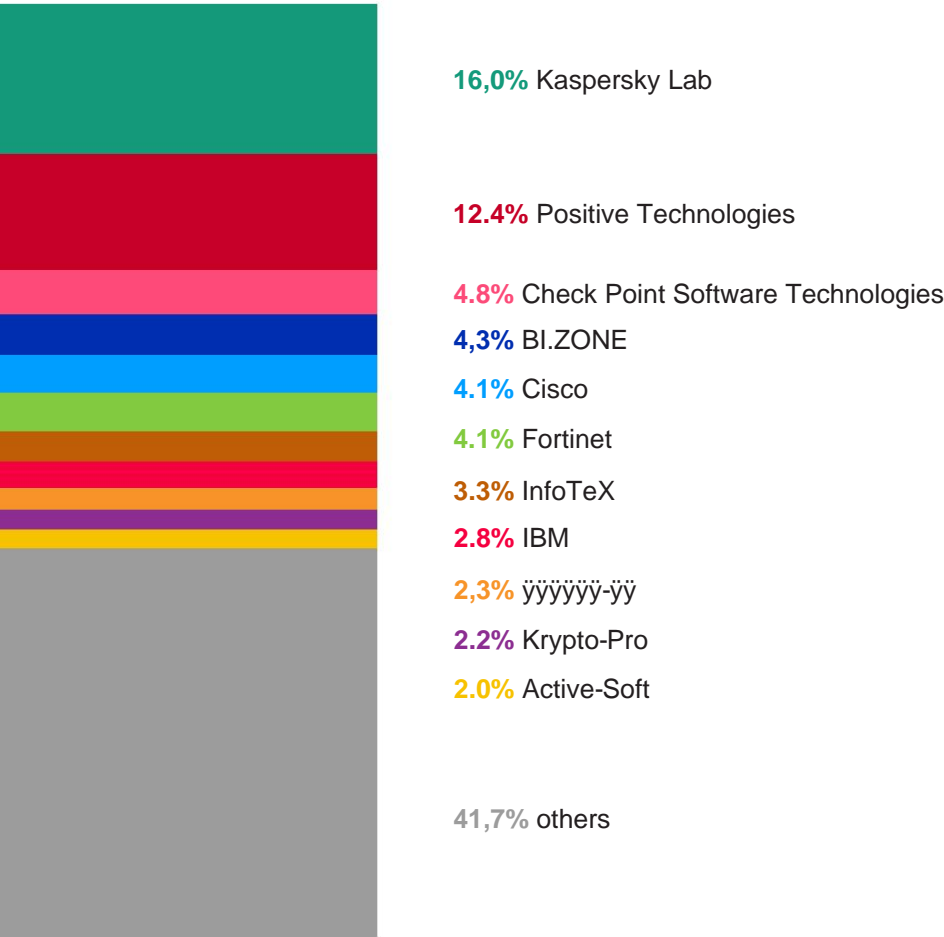


Table 2. ÿÿÿÿ10 vendors of information security tools by sales in 2022 (not including services)

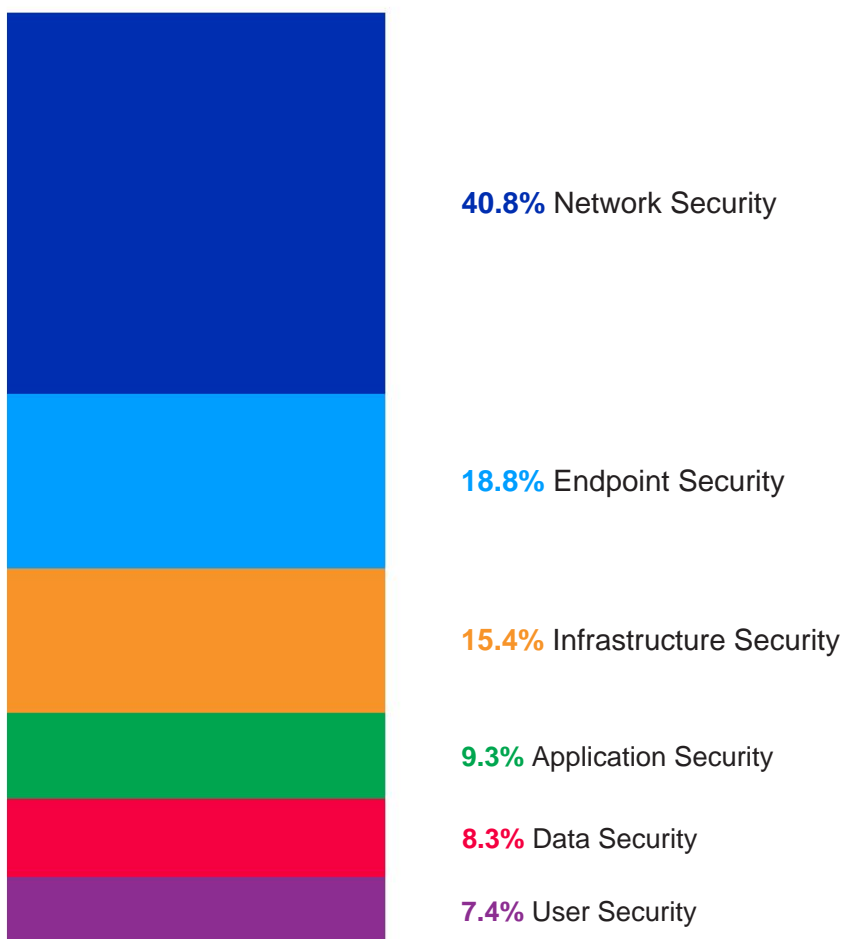
Position	Vendor	Jurisdiction
1	Kaspersky Lab	RF
2	Positive Technologies	RF
3	Check Point Software Technologies	ÿÿÿÿÿÿÿÿÿÿÿÿ
4	BI. ZONE	RF
5	Cisco	ÿÿÿÿÿÿÿÿÿÿÿÿ
6	Fortinet	ÿÿÿÿÿÿÿÿÿÿÿÿ
7	InfoTeX	RF
8	IBM	ÿÿÿÿÿÿÿÿÿÿÿÿ
9	ÿÿÿÿÿÿ-ÿÿ	RF
10	Krypto-Pro	RF



On the following graph, the share distribution of the following categories of information security tools offered on the market in 2022 is shown:

- means of protecting infrastructure (infrastructure security);
- network security tools;
- Application security tools;
- data protection tools (data security);
- user security tools;
- Endpoint security means.

**Figure 4. Share distribution of the category of information security tools according to the results of 2022**



Relative to 2021, it is possible to observe a slight decrease in the share of network security **to 40.8%** (**45%** in 2021) and almost a two-fold reduction in the share of data protection **to 8.3%** (15% in 2021). The most noticeable, practically on 6 percentage points, the "end point" protection sector grew - up to 18.8% (13% a year ago ).

On the background of the geopolitical events of 2022 and the introduction of sanctions from the Russian market  
Practically all notable foreign vendors.

**Table 3. Information about the departure of foreign vendors**

Vendor	Note	Vendor's presence in the Russian market	Vendor's sale	Stopped support
Check Point Software Technologies	There are no messages on the official site o suspension Vendor's website	Net	Net	Net
Fortinet	It is excluded on the official site Russian language version <a href="https://www.fortinet.com/">https://www.fortinet.com/</a>	yes	yes	yes
Imperva	Product line Vendor's website is not available <a href="https://store.softline.ru/imperva/">https://store.softline.ru/imperva/</a>	yes	yes	yes
F5	Part of the team of developers Vendor's popular web server in the world Nginx site hosting is back Vendor's website is not available Angie <a href="https://www.kommersant.ru/doc/5634072">https://www.kommersant.ru/doc/5634072</a>	yes	yes	yes
CyberArk	On site Softline product line Temporarily not available <a href="https://store.softline.ru/cyber-ark/-267934/#description">https://store.softline.ru/cyber-ark/-267934/#description</a>	Net	yes	yes
Palo Alto Networks	Vendor's website is not available The ruler is temporarily not available on the site Vendor's website is not available update There are no tapes on the official site	Net	yes	yes
Trend Micro	Trend Micro Store at the moment Closed for Russian users <a href="https://shop.mmea.trendmicro.com/ru_ru/">https://shop.mmea.trendmicro.com/ru_ru/</a>	Net	yes	yes
Cisco	"Cisco stops all business operations." Vendor's website is not available... - it is said in the letter of the chief executive Director of the company Chaka Robbins in a letter Vendor's website, access to which he received MarketWatch <a href="https://www.marketwatch.com/story/cisco-systems-is-latest-american-company-to-stop-business-operations-in-russia-2022-03-03">https://www.marketwatch.com/story/cisco-systems-is-latest-american-company-to-stop-business-operations-in-russia-2022-03-03</a>	yes	yes	yes

Vendor	Note	Удалены из продажи	Удалены из продажи	Stopped support
IBM	7 June 2022 American company And the largest producer and supplier IBM hardware and software I announced my final departure from Russia <a href="https://ria.ru/20220607/ibm1793740096.html">https://ria.ru/20220607/ibm1793740096.html</a>	yes	yes	yes
Micro Focus	Удалены из продажи Russian users. System It works in general. Support Удалены из продажи. Удалены из продажи Accounts are not made	—	yes	yes
ESET	The company announced the cessation of deliveries Удалены из продажи. Удалены из продажи Close the representative offices and stop Technical support of active users	yes	yes	Net
Broadcom (Symantec)	Удалены из продажи Russian licenses and accounts users	yes	yes	yes
Trellix	Trellix company has stopped working Their products in Russia. Удалены из продажи encountered installation problems, Registration and updates of antiviruses	yes	yes	yes
ForcePoint	Удалены из продажи Удалены из продажи. Удалены из продажи Удалены из продажи. Удалены из продажи	Net	yes	yes
Nessus	The company produced licenses Russian users. Удалены из продажи Softline product is not available	Net	yes	yes
Checkmarx	There are no messages on the official site Удалены из продажи Удалены из продажи	Net	Net	Net

However, despite the rapid exit, the share of foreign vendors in the market in 2022  
Удалены из продажи. Удалены из продажи. Удалены из продажи. Удалены из продажи. Удалены из продажи  
Удалены из продажи. Удалены из продажи— network security

**Table 4. Top-5 vendors in the category of information protection tools as of 2022**

Position	Vendor	Jurisdiction
<b>Network security tools</b>		
1	Check Point Software Technologies	yy
2	Fortinet	yy
3	Cisco Systems	yy
4	Kaspersky Lab	RF
5	Positive Technologies	RF
<b>"endpoint security" means of protection</b>		
1	Kaspersky Lab	RF
2	Dr. Web	RF
3	ESET	yy
4	InfoTeX	RF
5	yy yy	RF
<b>Infrastructure security tools</b>		
1	Positive Technologies	RF
2	IBM	yy
3	Rvision	RF
4	FACCT	RF
5	Kaspersky Lab	RF
<b>Application security tools</b>		
1	Positive Technologies	RF
2	BI. ZONE	RF
3	Micro Focus International	yy
4	Rostelecom-Solar	RF
5	F5	yy
<b>Data security tools</b>		
1	BI. ZONE	RF
2	yy-yy (yy «yy-yy»)	RF
3	InfoTeX	RF
3	Kaspersky Lab	RF
3	KryptoPro	RF
4	UserGate	RF
5	yy yy	RF
5		RF

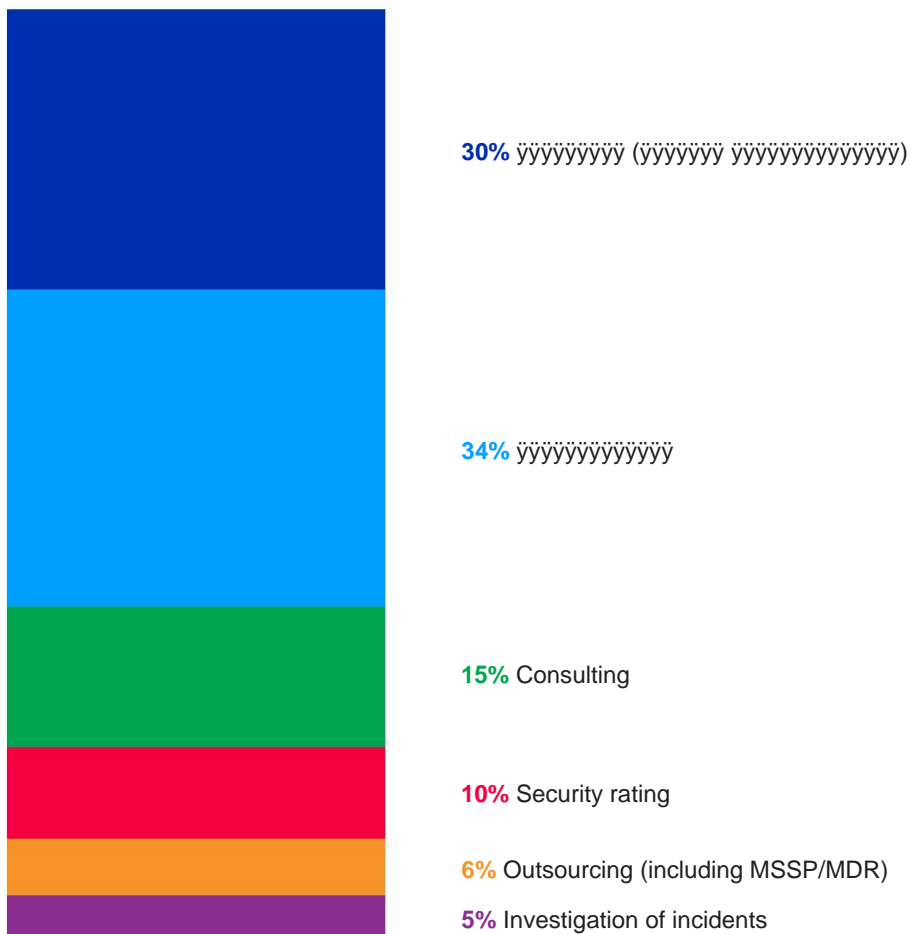
Position	Vendor	Jurisdiction
<b>User security tools</b>		
1	Active-Soft	RF
2	CyberArk Software	yyyyyyyyyyyy
3	Krypto-Pro	RF
4	Aladdin ѧ.ѧ.	RF
5	Bl. ZONE	RF

Share distribution of services offered in the market in 2022 in the region

Ensuring information security:

- Implementation, including preparatory stages, design and support (obespeĳenie life cycle means of protection);
- Consulting, including assessment of security of information resources and investigation Incidents of information security;
- Outsourcing, including the management of protective equipment, detection and reaction on incidents

**Figure 5. yyyyyyyy yyyyyyyyyyyy yyyyy yy yy yyyyyyyyyy 2022 yyy**



The share distribution of services has changed more significantly than in 2021, it is observed  
A significant increase in escort services— 34% at the end of 2022 against 19% in 2021.  
More than two-fold increase in security rating (up to 10% in 2022 against 3% in 2021)  
and incident investigations (up to 5% in 2022 versus 2% in 2021). It happened on this background  
A significant drop in outsourcing — 6% in 2022 against 29% in 2021.

Leaders in the provision of information security services in 2022:

1. Rostelecom-Solar
3. BI. ZONE
5. Positive Technologies
2. Laboratory  
Kaspersky
4. Security code

The cyber security market of the Russian Federation continued to grow with the total in 2022  
Compound annual growth rate (CAGR) is 3.99%. This is lower than right  
The world market, which grows at 11% per year, is significantly lower than the previous growth rate  
Russian market, but significantly better than the initial forecast, by falling to 10%. it is possible  
To conclude that the geopolitical events of 2022 could not affect the Russian market  
rapid development

Decomposition of market share volumes and calculated CAGR values for 2022 by categories  
The previously considered means of protection are shown in Table 5.

Table 5. Decomposition of market share volumes and estimated CAGR values for 2022 by categories of previously considered security tools

Category of information protection tools	Doli market volume (%)	volume market share (billion rubles)	CAGR (%)
Network security tools	40.8%	58	-4.7%
"endpoint security" means of protection	18.8%	27	46.0%
Infrastructure security tools	15.4%	22	29.4%
Application security tools	9.3%	13	19.9%
Data security tools	8.3%	12	-40.5%
User security tools	7.4%	10	16.6%
TOTAL		142	4.5%

The volume of the services market was 50.8 billion rubles. y CARG 2,56%.

# Market expectations for 2023 and forecast until 2027

The market expectations of 2023 are formed against the background of ongoing geopolitical changes, which took place in 2022, the departure of foreign vendors from the domestic market<sup>4</sup> (foreign vendors accounted for **39%** of the total market volume as of 2021 **and 30%** at the end of 2022). The situation for Russian vendors remains optimistic, as the demand for solutions that provide cyber security continues to grow. The truth is due to the following factors related to the changed world situation and measures taken by the government (regulators) and business to strengthen cyber security:

1. Requirements for information security solutions, including the need for solutions that provide cyber security, will continue to grow;
2. Restrictions on the delivery of foreign products to Russia, including the restriction of deliveries of their products to Russia;
3. The responsibility of the first persons of the organizations for ensuring their information security is introduced (see President's Decree 01.05.2022 No. 250 "On additional measures for security of the Russian Federation");
4. From March 31, 2022, the purchase of foreign software for use on significant objects of KII is prohibited, and from January 1, 2025, the use of foreign software is prohibited for all objects defined by Presidential Decree No. 250 (see Presidential Decree No. 166 of 30.03.2022). Measures for ensuring the technological independence and safety of the critical information infrastructure of the Russian Federation");
5. Gosudarstvom actively stimulates the development of the industry (vydelyauts subsidii). and grants, as well as other industry support measures: tax and other benefits, additional training programs, reduction of regulatory burden);
6. Requirements for information security solutions, including the need for solutions that provide cyber security, will continue to grow.

<sup>4</sup> When forming the information security market model until 2027:

- The market growth in previous years was taken as the basis (CARG 15%);
- The impact of the specified factors on market growth was estimated in separate categories of information security tools and services;
- The influence of factors was estimated over the years based on the gradual stabilization of the market in the changed conditions until 2027;
- Assessment of the impact of factors formed from the assessment of 2022, the first quarter of 2023 and expert assessments.

The rapid exit of foreign vendors in 2022 did not lead to the expected reduction of the total market volume (under the market volume is meant the amount of money paid by the customer, not actual demand)— domestic companies were able to quickly replace most of the solutions, in addition, parallel import schemes were implemented and other ways of bypassing sanctions restrictions. At the same time, the drop in revenue of foreign vendors in 2022 amounted to more than **70%**, as a result, according to the results of the year, their market share decreased **to 30%**.

Although a more gradual departure of foreign vendors was predicted earlier, in reality their share was shrinking faster. Most of them announced that they will leave the Russian market in 2022, although previously concluded contracts, the actual "transitional period", and parallel and gray imports allowed them to save a significant amount at the end of the year. In 2023, a significant drop in the share of foreign vendors is expected. Also, it is possible to mention the restructuring of a number of companies due to the exit of foreign capital from them. As an example, you can give Group-IB: on April 20, the beginning of the history of FACCT company after the final separation of Russian and international assets of Group-IB. Russian assets of Group-IB were bought by local shareholders and top management. At the same time, the new owners kept all contracts with Russian clients, as well as products, technologies and services developed in the country.

The situation for Russian vendors looks more positive than in the mid-2022 forecast. They have a solid portfolio of products and services and quickly occupy the free market. The main part of the free market share (about **60 billion rubles**) will be developed in the course of the next 2 years based on the existing developments and solutions of Russian vendors.

The development of the missing solutions can take up to 5 years before the products reach the required level of quality, although **80%** of all such solutions will most likely be on the market within the next 2 years. As an example of development against the background of the existing situation, the case of Positive Technologies can be cited: since the listing of Positive Technologies, the quotations of Positive Technologies have increased more than 2 times, the revenue in 2022 has increased by 95%, **from 7.1 to 13.8 billion rubles**. In 2023, the company announced the goal of increasing the sales of SZI **to 20-25 billion rubles**. (with potential growth to 30 **billion rubles**.) In other words, revenue growth is expected to increase **from 45% to 117%**. Another example of development against the backdrop of the geopolitical crisis is Kaspersky Lab, which bought **49%** of Fopipl LLC in 2022.

(ForPeople), which develops an analogue of SAP's HR-platform GP OrgManager and in 2023, **49%** of the company Ximi Pro, which works in the field of container IT-infrastructure security. Also, Garda Tehnologii acquired a controlling stake in Makves, a software developer for IT audit and data protection.

On the basis of expert evaluations of market participants, an assessment of the influence of factors on the market over the years was carried out. In addition to obvious factors, there are a number of hidden factors, the key of which is the reluctance of large customers to refuse foreign SZI and switch to domestic solutions. It is considered that some of them are in a waiting position until they are convinced of the maturity of Russian SZI. The basic forecast is that domestic vendors will bring their product line to final maturity in 2023-2024. Accordingly, you can expect an additional and significant inflow of funds to the market in this period.

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5 <https://vc.ru/services/495935-laboratoriya-kasperskogo-kupila-49-v-kompanii-forpeople-razrabotchike-resheniy-analogichnyh-sap>

6 <https://www.interfax.ru/business/886912>

7 <https://www.anti-malware.ru/news/2023-04-12-118537/40934>

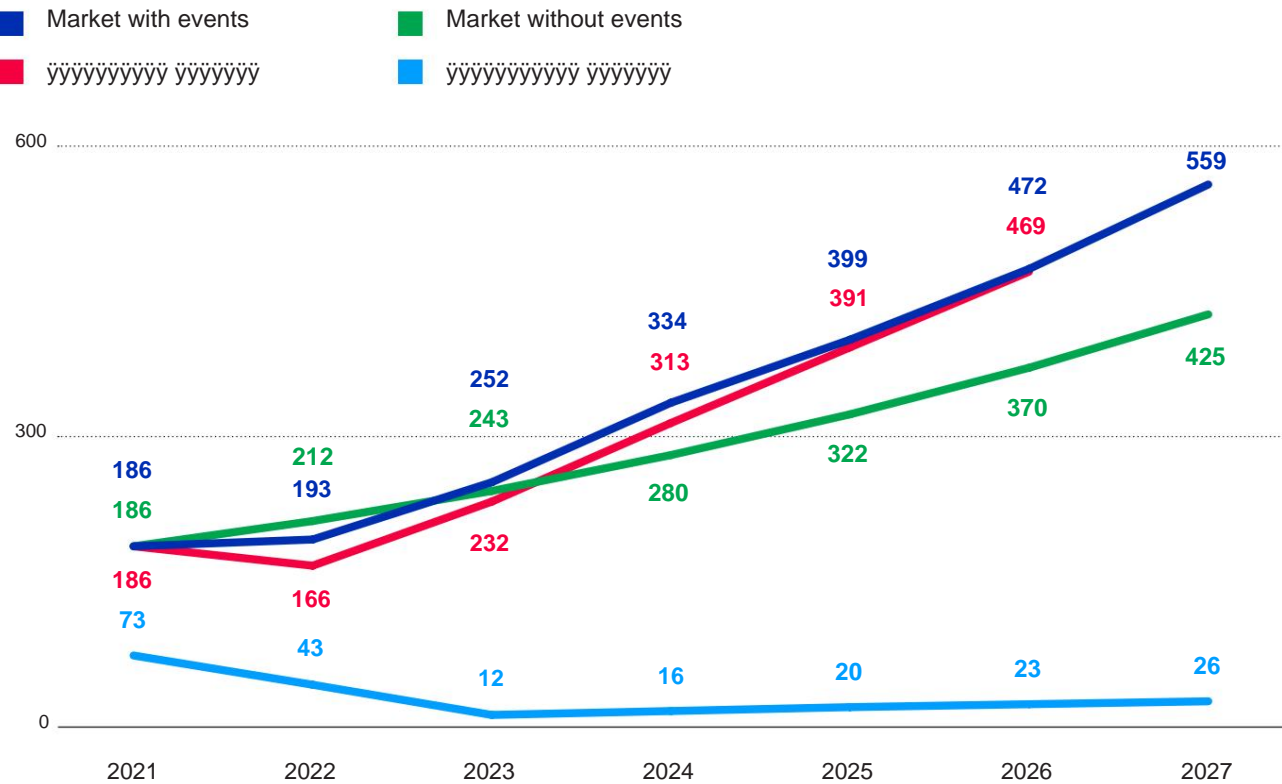


Table 6. Evaluation of the influence of factors on market growth

Factor	2023	2024	2025	2026	2027
True numbers of cyber attacks	8%	7%	6%	6%	6%
yyyy yyyyyyyyyy yyyyyyy	7%	5%	3%	3%	3%
Sanctions and restrictions related to them	-2%	-2%	-2%	-1%	-1%
Responsibility of organizations for the insurance of yB	0%	0%	0%	0%	0%
yyyyyy yyyyyyyyyy yy on yy objects	1%	1%	1%	0%	0%
Financial support measures	10%	10%	10%	9%	9%
Non-financial support measures	2%	2%	2%	2%	2%
yyyyyyyyyy yyyyyyyyyy y yy	-1%	-1%	-1%	-1%	-1%
Readiness of customers for importation	5%	10%	—	—	—
yyyyyyyyyy yyy yYNYy (yyy y yyy)	31%	32%	19%	18%	18%

Also, it is necessary to note that after 2022, the market began to grow due to the regions and this country  
The dynamics is increasing, which can become an additional positive factor in the growth of the market  
in 2023 and subsequent years.

Figure 6. Forecast of the development of the Russian cyber security market, billion rubles.



It is also necessary to note the attempts to expand to the domestic market of companies from friendly countries, especially China. However, the factors that allowed them to occupy a significant share of the market are not considered. Because of them, the share of foreign vendors can grow to 8% by 2026.

# Conclusions

Russian security market continues to grow. The expected fall in 2022 was actually significant

Softer than previously predicted, it did not lead to a drop in market volumes relative to 2021.

The growth of the cyber security market for the period 2022-2027 is expected to be **24% CAGR**, which will reach **559 billion rubles** by 2027 . **531 billion rubles** will be allocated to the Russian vendors . or **95%** of the total volume of this part of the market.

The network security segment is the only one where leadership is still fixed behind foreign vendors. At the same time, this segment is the largest of all. It is expected that there will be an active competitive struggle for leadership.

The volume of the services market in 2027 is estimated to be **145.3 billion rubles.** against **49.8 billion rubles.** In 2022, Russian vendors will have **138 billion rubles.**

yyyyyyyyyy yyyyyy yyyy y yyyyyyyyyy 5 yy y yyyyyyyyyyy  
yyyyyyyyy yyyyyy yyyyy, yy yyyyyyyyyyy yyyyyyy yyyyyy  
significantly higher than average.

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