

Research – Russian Business Process Outsourcing Market

By [Olga Kapralova](#)

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Olga Kapralova

PR & Marketing Manager
Intercomp Global Services

Local and international companies have been using business process outsourcing services in Russia since the early 1990s. The first survey of the market was conducted only three years ago by the Russian rating agency Expert RA. The survey showed that the accountancy outsourcing sector was quite small. Few companies offer such services, and only about a dozen provide such services on a large scale.

The first research on the matter covered about 80 companies specializing in accounting outsourcing whose total earnings amounted to 32 billion rubles in 2009. The next year, the Russian BPO market demonstrated a 13 percent growth and the total earnings of surveyed companies amounted to 3.8 billion rubles. In 2011, according to the results of the last Expert RA survey, published on May 7, 2012, a 17 percent sustainable growth of the BPO market in Russia was registered. Similarly, the consolidated revenue of the 90 companies surveyed in 2011 reached 5 billion rubles. For the third year in a row, Intercomp Global Services Company came out on top as the leader of the rating. Intercomp Global Services began its activities in Russia in 1994 and has retained its leading position since then with a total revenue of 0.8 billion rubles, more than twice that of other market players.

The last survey determined that the most popular type of business process outsourcing services in Russia is financial and tax accounting outsourcing. Under this arrangement, the provider is responsible for all bookkeeping and tax accounting. Another favorite outsourced activity is payroll. Also, most survey participants mentioned that one-off projects for outsourcing are now quite popular among clients, such as reporting preparation, accounts inspection and recovery, inventory and fixed assets auditing, cash maintenance, accounting policy development, etc. Outsourcing for HR administration is currently not very widespread in Russia: it accounts for a mere 4 percent of the survey participants' total revenue. The main goals of companies using F&A and HR outsourcing services are to minimize their costs

and improve the quality of their functions.

According to the Expert RA surveys, demand for business process services is growing each year. The clients' database is increasing as well. In 2010, surveyed companies provided services to 2,189 clients, and in 2011, to 2,711 clients. Customers have become more experienced and selective about whom they will work with; they now pay more attention to what additional services and friendly usable IT solutions providers include in their basic outsourcing packages.

The research clearly highlights the fact that outsourcing solutions are gaining popularity in Russia. Most of the 90 surveyed outsourcing providers showed 20 percent revenue growth comparable to 2010 and only 13 of them finished 2011 with negative dynamics.

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