

# Logicot OS market & growth note

A short note on the global tailwind, the regional wedge and the illustrative bottom-up SAM behind the first regional entry point.

**\$283.1B**



**\$636.1B**

Global AI software,  
2025-2027

**₽1.4918T**

Russian software  
market, 2025

**\$73M**

Kazakhstan AI  
venture, 2025

**~\$65.35M**

Illustrative SAM for  
the first regional  
wedge

## GLOBAL TAILWIND

- Gartner expects AI software spend to grow from \$283.1B in 2025 to \$452.5B in 2026 and \$636.1B in 2027.
- Gartner also expects task-specific AI agents in 40% of enterprise applications by the end of 2026 versus less than 5% in 2025.
- McKinsey says 88% of organizations already use AI in at least one business function; 23% already scale agentic AI in at least one function and another 39% are experimenting.
- OpenAI reports more than 1 million business customers and international API customer growth above 70% over the last six months.

## REGIONAL WEDGE

- Russia remains the main monetization wedge: the software market reached ₽1.4918T in 2025 and MWS expects the broader IT market to reach ₽6.7459T by 2030.
- Kazakhstan strengthens the growth and export logic: AI venture grew from about \$14M in 2023 to \$73M in 2025, and the ecosystem now includes 100+ AI startups.
- Official Kazakhstan statistics report 4,203 large and medium enterprises with more than 100 employees in Q2 2025.
- Belarus is treated as adjacency rather than the headline market: it supports later expansion, but it is not the core first-wedge story.

## ILLUSTRATIVE BOTTOM-UP SAM

- Russia: a base of almost 21,000 medium-sized companies; modelled 10% ICP fit = 2,100 target accounts x \$25k ACV = \$52.5M annual surface.
- Kazakhstan: 4,203 large and medium enterprises with >100 employees; modelled 15% fit = about 630 target accounts x \$18k ACV = \$11.35M annual surface.
- Belarus: an adjacency layer of 100 target accounts x \$15k ACV = \$1.5M annual surface.
- Regional SAM of about \$65.35M is presented as a bottom-up management assumption, not as a public market-share claim.

Illustrative bottom-up model for fundraising discussions. This is not a public market-share claim or a revenue forecast.