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Architecture of the New Economy: Digital Platforms Become the Infrastructure Foundation of the Russian Market

IT intermediaries are completely transforming consumer and business perceptions of trade and interaction with the state
The Law on the Platform Economy will come into force in Russia on October 1, 2026. It will establish clear rules of the game for marketplaces and aggregators. The core of the innovations will consist of four key measures: creating a registry of digital platforms, mandatory verification of partners, transparent ranking, and regulation of price promotions. Deputy Chief of the Presidential Administration Maxim Oreshkin, in an interview with Expert magazine, drew an analogy between digital platforms and a new planned economy, warning about the dark side of their rapid development: behind the sector's growth lies monopolization, which is embedded in the very DNA of these ecosystems.

Anatomy of Platformization

Russia is on the verge of a digital reboot. On October 1, 2026, Federal Law No. 289-FZ "On the Platform Economy" comes into

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force – a document that codifies a tectonic shift in the structure of the national economy. Digital platforms are no longer "just websites": they generate 5.5% of GDP, support employment worth 239 billion roubles, and have become the circulatory system connecting manufacturers from remote regions with buyers in megacities.

But a deeper transformation lies behind the numbers. As Maxim Oreshkin accurately noted, while the industrial revolution automated human relationships with nature, platformization automates human relationships with human beings. Algorithms are replacing institutions: dispatchers, reputation mechanisms, and intermediaries. A taxi fleet has become a software code, a storefront has become a product feed, and trust has become a five-star rating.

What does this mean in practice? For small businesses, platforms are simultaneously an elevator to the federal market and a new dependency on the rules of a "digital landlord." For the state, they are a tool to reduce transaction costs and a challenge in the field of antitrust regulation. For the consumer, they offer convenience, the price of which is a growing concentration of data in the hands of a few players.

"Today, digital platforms in the Russian economy perform the function of a key coordination mechanism, comparable to traditional markets and hierarchies, while radically reducing the transaction costs of searching for, concluding, and monitoring deals," says **Vadim Tkachenko**, Public Commissioner for Information Technology and Digitalization. "On this basis, a hybrid model of platform capitalism is emerging in Russia. It combines market mechanisms with an active role of the state through digital infrastructures and registries, which distinguishes it from both the liberal US model and the centralized Chinese model, forming a unique configuration of a platform-state symbiosis".

Marketplaces and ecosystems are transforming traditional value chains by eliminating classic intermediaries, but they simultaneously concentrate control over market access, shifting economic rent in favor of the platforms and increasing the dependence of manufacturers and small businesses on digital intermediaries. At the same time, within the logic of the modern digital economy, Big Data is becoming an independent factor of production, while control over user data and access interfaces builds new barriers to entry and amplifies network concentration effects, requiring a rethink of antitrust policy. Finally, the deep integration of platforms with state information systems leads to the formation of a proactive economic model where a significant portion of transactions and audits is automated: this reduces costs but simultaneously increases the risks of algorithmic governance and demands new approaches to regulation, accountability, and data protection, the rights advocate claims.

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A Legal Approach

In the Russian realities of 2026, the definition of a "digital platform" is best taken from Federal Law No. 289-FZ on the Platform Economy, which comes into force on October 1, 2026. As Freedom Finance Global analyst Vladimir Chernov noted, the law defines a digital platform as an information system, website, or software program that provides the technical and organizational capability for interaction among an unrestricted circle of persons, including for information exchange, the sale of goods, the execution of work, and the provision of services. The platform economy is described in the same law as the aggregate of relationships that take shape through such digital platforms.

The boundary between a platform, a marketplace, and an ecosystem is defined by their functions. A digital platform is the broadest concept. In a legal sense, a marketplace is closer to an intermediary digital platform that features an operator, sellers or service providers, users, product or service listings, orders, transactions, and payment. An ecosystem is already a broader business model. It can include a marketplace, fintech, logistics, subscriptions, advertising, cloud services, and its own identification system, but there is no separate, universal legal definition of an ecosystem in Law No. 289-FZ, the analyst warned.

Several types of platforms are currently having the greatest impact on the economy simultaneously, though through different channels. "Commercial platforms are bringing the most significant changes to retail, logistics, and sales for small businesses," Chernov noted. "The Ministry of Economic Development estimated that in 2024, digital platforms accounted for about 15% of retail turnover, while the number of orders placed through them reached 6 billion".

State platforms have the strongest impact on the transaction costs of citizens and businesses. According to the Ministry of Digital Development, 120 million accounts were registered on the Gosuslugi portal in 2025, with a daily audience of 14 million people, and the number of services ordered over the year approached 900 million. This is already an infrastructure for daily interaction with the state, rather than just a website for submitting applications, the expert noted.

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Conquests of the Algorithmic Empire

The journey of a regional manufacturer to a federal buyer has now been significantly shortened thanks to the operation of marketplaces. Previously, small businesses had to negotiate with retail chains, rent retail space, build their own logistics, and handle promotion separately. Now, the platform takes over some of these functions. For regional SMEs, this lowers the barrier to entry into trade and provides quick access to demand outside their own region.

This role is also evident in government support programs. On the MSP.RF portal, a joint project with the "Platforma Rosta" (Growth Platform) allowed more than 1,000 brands from 40 regions to reach a new level, and entrepreneurs from 42 regions are already participating in the new 2026 cohort. While this does not represent the entire marketplace economy, it serves as an official example of how platforms are becoming a scaling channel for regional brands.

"Value chains for small and medium-sized businesses have undergone a radical change with the arrival of marketplaces, as they have significantly boosted turnover by transforming logistics, granting them direct access to 90% of the population via the Internet," points out Grigory Osipov, a former FSB employee and now an independent cybersecurity expert. "While consumers in Central Russia had a relative choice, regions – and especially remote areas – had a deeply entrenched dependency on local markets and wholesalers. Local businesses gained the opportunity to establish their own pickup points in the region using a popular franchise (low barriers to entry into business), without the need for physical stores and logistics (the product storefront is online, while delivery is handled by the marketplace). This has turned out to be a more profitable business model than reselling goods from wholesalers".

Commercial platforms – specifically the Wildberries and Ozon marketplaces – currently have the greatest impact on the Russian economy. Why? As noted by Timur Aitov, head of the Financial Market Security Commission of the Chamber of Commerce and Industry (CCI) of the Russian Federation, it is because they hold 77% of all online orders, according to data from a Data Insight study conducted last year. They control both prices and service standards. Technological ecosystems – such as Yandex and Sber – are close behind, but they currently lag in terms of retail turnover share.

Social and Business-Oriented

Social networks and messengers also constitute a vital part of the platform economy. However, they serve primarily as

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channels for proactive interaction among economic actors and for advertising. "Platforms like VK and Telegram are no longer just communication channels; they have become the 'litmus test' for consumer behavior and business etiquette in Russia," claims Anna Efremova, Head of the PR Department at the vvCube Consulting Group and Member of the Working Group on Digitalization and Unmanned Systems under the Moscow Presidential Commissioner for Entrepreneurs' Rights. "VK, having evolved from a social network into a full ecosystem, is shaping a habit of 'seamless' consumption: a user visits for news but leaves with a purchase from an embedded marketplace after watching a webinar directly in the media player. This creates an effect of co-presence – a blogger’s word or a review in a group discussion carries more weight now than any banner ad. Telegram, on the other hand, has set a trend for 'donor channels': trust in a business is now built through opinion columns and private chats, where the consumer feels privy to insider information".

As for business communications, radical changes have occurred to adapt to the modern demands of the audience. Corporate correspondence has migrated from emails to messengers, and the criterion for responsiveness is no longer an answer within a day, but a reaction with a "like" or an emoji within a minute. Furthermore, publicity has become the new courtesy: resolving an issue via a comment in a public page or a pre-screen community chat is perceived as top-tier service, whereas direct messages are increasingly associated with bureaucracy. Both VK and Telegram have taught businesses an important lesson: the best PR today is everyday utility. If a company does not create an event in the feed or deliver a useful newsletter in its channel, it simply does not exist in the eyes of the consumer.

Businesses are forced to review their budgets, guiding themselves by the consumer's focus of attention: traditional media are giving way to native integrations and chat-bot consultants because platforms have already formed a reflex to "resolve the issue right here and now, without leaving the application." Everyone, from micro-businesses to state corporations, will have to reckon with this trend, Efremova is certain.

The Dark Side of Convenience

However, it is important to remember that marketplaces, social networks, and messengers are not altruists. A reverse side to interacting with platforms has emerged very quickly: dependency on their rules, logistics tariffs, search rankings, ratings, and product listing requirements, alongside commissions that have steadily risen in some cases to reach 20%. Furthermore, because of online trade and its infrastructure, many domestic manufacturers find it difficult to compete with cheap Chinese

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products – even low-quality ones that may masquerade as "domestically produced" – which enjoy streamlined logistics and prime storefront placement on popular online platforms.

"Today, digital platforms are no longer just a tech sector, but a full-fledged and rapidly growing part of the economy that processes the trade, services, finances, and employment of millions of people," says Alexander Aksyonenko, Deputy Chairman of the State Duma Committee on Construction, Housing, and Utilities. "Essentially, this is a new infrastructure that largely dictates how the market operates. But it is crucial to see the other side as well. Behind this economy are real people—couriers, pickup point staff, entrepreneurs. For many, this is their main source of income. This makes it a matter not just of platform efficiency, but of the fairness of the conditions under which these people work." A separate issue is trust. Consumers must be confident that they are buying legal and safe goods. This requires transparent mechanisms: partner verification, integration with state registries, and reliable product information. Platforms cannot remain outside the scope of general regulation, the deputy emphasized. This is precisely why Law No. 289-FZ explicitly codifies requirements for the contract between the operator and the seller, as well as access to information regarding ratings, ranking principles, commissions, and discounts.

Yet there is a broader layer of emerging dependencies within the platform economy that creates risks difficult to regulate by law alone. As Osipov noted, all types of platforms – and consequently their business counterparties and consumers – depend entirely on the availability of electricity and the Internet. Here, a double challenge arises: on one hand, digitalization and logistics have not yet reached all remote corners of Russia; on the other hand, there is a risk of service disruptions due to network outages, which have already become a regular occurrence in many regions of our country, particularly in border areas.

A Service Backbone for the State Apparatus

And yet, despite all the risks, it is impossible to deny the progress of digitalization for Russia. The "Gosuslugi" portal can be – and rightly is – considered one of the most successful examples of a platform approach in the public sector. According to the Ministry of Digital Development, 120 million accounts were registered on the portal in 2025, with the daily audience reaching 14 million people, and the number of services ordered over the year approached 900 million. More than 2.6 thousand federal and regional services and features were operational on the portal.

The main advantage is the reduction of expenses associated with interacting with the state. "The decrease in transaction costs

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is evident here across two metrics," Chernov believes. "First, citizens and businesses require less time to submit applications, obtain certificates, process payouts, register documents, and sign up for services. Second, the state receives a more standardized stream of requests, resulting in less manual processing and more data in electronic format." According to the Ministry of Digital Development, more than 4 million personal accounts for legal entities and individual entrepreneurs (IPs) have been created on the portal, with over 2 million applications submitted daily, and service processing times ranging from a single minute to 72 hours.

Another crucial aspect is the transition from standalone services to real life situations. On Gosuslugi, an individual does not resolve an abstract administrative task, but rather a specific situation, such as the birth of a child, enrolling in a university, registering a car, receiving a payout, or registering a business.

However, the authorities have no intention of resting on their laurels with the success of Gosuslugi. "And here we arrive at the primary solution being discussed in 2026: we are talking about the full-scale integration of commercial platforms with state information systems," Aitov notes. "What does this mean in practice? Direct, secure data exchange through the Unified System of Interagency Electronic Interaction (SMEV). For instance, automatic partner verification: the platform will screen a counterparty against registries – such as the EGRUL (Unified State Register of Legal Entities), 'Chestny ZNAK,' and Rospotrebnadzor – in a single second." Starting in 2026, the "Chestny ZNAK" system already operates in this mode using the State System for Digital Marking and Traceability of Goods developed by the Center for Research in Perspective Technologies (CRPT). This eliminates counterfeit goods and "gray-market" sellers without the need for additional bureaucratic audits. "The platform economy is not the future," Aitov emphasized. "It is today. It has its advantages: accessibility, convenience, growth. It has its disadvantages: monopoly, risks, hidden commissions. But most importantly, we have gained a chance to make this environment transparent, safe, and sovereign – not through prohibitions, but through smart integration".

Integral Effect

Data regarding the total integral effect of platform implementation on our country's economy varies. For instance, according to information from the Ministry of Economic Development as of July 2025, the platform economy accounted for about 5% of Russia's GDP, and this contribution is projected to grow. Meanwhile, in March 2026, at the Digital Qazaqstan forum, Prime Minister Mikhail Mishustin stated that the contribution of the IT industry – which logically encompasses digital platforms – to

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Russia's GDP had doubled over six years, reaching 2.7%.

When looking at the contribution of platforms to employment, as of December 2025, data from the Financial University under the Government of the Russian Federation shows that more than 4% of Russians are employed in sectors related to e-commerce, with platforms accounting for 1–2% of that total.

"If we compare this with global trends, Russia lags behind by almost half on average; for example, in the US, the activities of platforms like Google and Amazon account for around 10% of the country's GDP," Osipov points out. "Employment in e-commerce in the US stands at about 5%, while the global trend ranges between 2% and 5%".

According to Alexey Zyuzin, CEO of the Institute for Crypto-Industry Development, evaluating the platform economy's contribution to Russia's GDP is highly challenging due to a lack of high-quality research. There is data for 2024 that was subsequently repeated multiple times by various public officials throughout 2025. For instance, according to estimates by experts from the National Research University Higher School of Economics (HSE), the contribution of digital platforms to Russia's GDP reached 5.5% in 2024–2025. Minister of Economic Development Maxim Reshetnikov voiced the same estimate during a meeting of the interdepartmental working group on the development of digital economy ecosystems and digital platforms in November 2025. One in six people earns income through platforms, Reshetnikov stated at the time. Concurrently, all economic ministries expect rapid growth in this sector over the coming years. Thus, according to the Ministry of Labor's forecast, up to 15–20 million people could be employed via digital platforms by 2030.

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