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Romanian IT Market Study Evolution and Perspectives

— Cluj-Napoca, 2026 —



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THE IT INDUSTRY FROM A MACROECONOMIC PERSPECTIVE

Global IT industry



The **global IT industry** undergoes a fundamental transformation led by the adoption of AI that is entering the enterprise-wide implementation phase of **specialized AI solutions** for intelligent automation, such as agentic AI or small language modelling. Consequently, **job profiles are changing**, with data management and AI-related jobs on the rise.

Romania's IT competitiveness



In the transforming global IT landscape, **Romania** continues to offer a **competitive environment** for IT businesses, standing out in the Central and Southern European region with its robust **IT infrastructure** and employees capable of performing **high value-added activities**.

Romanian ICT industry analysis



The ICT industry plays an important role in the evolution of the Romanian economy reaching by 2025 over **7% of GDP** and almost **5% of employment**. While the share of the ICT sector in GDP has shown a growing trend over the last 15 years, the **growth of employee numbers has come to a halt**, decreasing slightly in the past two years.



The Romanian ICT sector employs over 235,000 people, out of which over **145,000 work in the IT industry**. While both indicators have shown a growing trend in recent years, the annual **growth rate** has dropped significantly and **turned negative in 2024 and 2025**.



Average monthly net salaries in the ICT sector have **grown significantly faster** than the national average over the past 15 years. **By 2025, they exceeded €2,000**, making ICT the best-paid sector in the Romanian economy, with wages consistently around **twice the national average salary**.



Generous tax incentives have supported the IT sector's growth for more than **two decades**. Recent reforms have gradually phased out these advantages, **fully repealing IT income-tax exemptions in 2025**. The decrease of microenterprise revenue threshold (to €250k in 2025, €100k in 2026) also means that more IT firms will pay standard corporate taxes.

Executive summary

THE IT INDUSTRY FROM A MACROECONOMIC PERSPECTIVE

Romanian ICT industry analysis (continued...)



Despite global transformations and local challenges, **the Romanian ICT sector is projected to grow** with a collective average of **4.7% per year** (CAGR, 2025-2030) due to a dynamically developing **startup ecosystem**, the **diversification of services**, the application of **emerging technologies** and expected continuation of government spending on digitalization based on **EU funds**.

IT COMPANIES IN ROMANIA

Performance of IT companies



IT companies in Romania have shown spectacular growth in the last 5 years, **increasing sales by over 20% yearly** coupled with stable average **net profit margins (13-14%)** and a significant **growth in employee productivity**.

Regional distribution



Bucharest-Ilfov is the leading location contributing with over 50% of the sales of the total sector, while the **North-West region** occupies a **strong second place** with a slightly less than 20% contribution. On a county level, the **capital** is followed by **Cluj, Timiș and Iași**, representing the most significant IT hubs in Romania with prominent university centers and high levels of foreign investment. Together with Ilfov, these **5 counties account for 87% of the total sales** of the Romanian IT industry.

Major IT hubs



In terms of cities, the **top 5 IT hubs** are **Bucharest, Cluj-Napoca, Timișoara, Iași and Brașov**. These 5 cities account for **85% of total sales, 84% of employees** and 56% of the total number of companies in the Romanian IT sector.

Executive summary

ANALYSIS OF OPERATIONS IN IT COMPANIES IN ROMANIA

Remote work



Remote work remains substantial across IT companies, especially in **core IT-related activities** as opposed to business functions. **40% of surveyed IT companies** in Romania are still using **full remote work**.

Internationalization



Internationalization is perceived as a challenging task mainly due to **market entry barriers** and **high competition in Europe and the U.S.** coupled with the lack of international visibility, financial constraints and lack of information. **Strategic partnerships with foreign companies** are, on the other hand, regarded as the best **opportunity for internationalization**.

AI solutions



Almost **65% of employees** in IT companies **use AI solutions daily** with only **6% of jobs being replaced by AI** in 2025, percentage expected to rise to 12% by 2028. AI is mainly used for knowledge management, IT product enhancement and automation of employee tasks. **Immature AI technologies** and **overhyped AI solutions** represent the main barriers of adoption.

Innovation



Innovation in IT companies, e.g., the development of AI solutions, is **generally done internally**. **External collaboration is low** and is mostly done with other companies. **Information sharing between functions** and through **internal platforms**, screening **employee ideas for innovation**, and creating **dedicated innovation groups** are the most frequent internal activities.

Executive summary

ANALYSIS OF OPERATIONS IN IT COMPANIES IN ROMANIA

Collaborative ecosystems



Similar to the infrequent collaboration with the external innovation ecosystem, the level of using **external grants for innovation funding is also low**. Internal financing is dominant, while the application for external financing is **bureaucratic** and **slow**. External resource sharing is mostly done with client companies only.



Membership in associations and clusters is mostly used for **networking purposes** and for gaining more opportunities for **(inter)national exposure**. The currently **immature but dynamically developing start-up ecosystem** with incubators and accelerator programs offers good potential for the future.

Diversity & sustainability



Diversity and sustainability remain important operational directions at companies: several companies offer **support for employees** after maternity leave; **environmental aspects** are generally taken into consideration during everyday activities (mostly for cost-cutting reasons); while the prevalence of specific green IT solutions as products sold remains low.

Future outlook



The future of the Romanian IT industry is expected to be shaped by constant **adaptation to fiscal changes**, capitalizing on the growing adoption of **AI-based solutions**, and addressing **workforce challenges** – particularly talent acquisition – while strengthening university partnerships and investing in upskilling and reskilling.

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Global ICT trends

The global ICT trends to look out for include the widely popular generative artificial intelligence, the quantum computing technologies, as well as the expansion of 5G networks that enhance connectivity.

TRENDS TO LOOK OUT FOR IN THE ICT INDUSTRY

Specialized & generative AI

The use of AI to create **high-quality content** is expanding rapidly, enabling **faster** and **more cost-effective** content production. The future goes **beyond large language models**, as enterprises are moving toward **small language models, multimodal AI** and **agentic AI**, that not only generate content, but also execute tasks autonomously.

Intelligent automation

AI is integrated into enterprise systems for predictive, efficient and adaptive processes. Thus, the software and hardware solutions are **evolving**, enabling the **acceleration** and **derisking** of the development, deployment and maintenance of ML solutions.

Cybersecurity and trust architectures

The technologies behind **trust architectures** and **digital identity, cybersecurity** and **Web3** enable organizations to build, scale and maintain the trust of stakeholders.

AI-powered infrastructure

The rollout of 5G and 6G cellular, Wi-Fi 6 and 7, low-Earth-orbit satellites **enhances connectivity** and supports technologies such as **IoT** and **autonomous vehicles**.



HIGHLIGHTS

Generative AI has experienced a **staggering 700% increase in Google searches from 2022 to 2023**. By 2025, **Generative AI adoption has entered enterprise-wide implementation phases, agentic AI shaping new business models and workflows.**

Global ICT trends

The global ICT trends to look out for include the widely popular generative artificial intelligence, the quantum computing technologies, as well as the expansion of 5G networks that enhance connectivity.

TRENDS TO LOOK OUT FOR IN THE ICT INDUSTRY

Cloud and edge computing

Cloud and edge computing **distribute workloads across locations** and help in **optimizing** data center **costs**. AI-embedded hardware and edge devices are turning infrastructure a **strategic differentiator**.

Quantum computing

Quantum technologies execute calculations **exponentially faster** than classical computers and **secure communication networks**. Quantum computing threatens today's encryption; thus, urgent adoption is needed of **post-quantum cryptography**.

Smart mobility

Autonomous and electric vehicles, urban air mobility and shared platforms enhance transportation efficiency. **AI-powered simulations and spatial computing** can optimize logistics, supply chains and traffic management, making mobility more adaptive.

Energy and technology

Technologies like **solar** and **wind power**, clean firm-energy sources and sustainable fuels have an impact on the entire **energy production**, storage and distribution value chain. **AI's rising energy demands** will push innovation towards sustainable energy sources.



HIGHLIGHTS

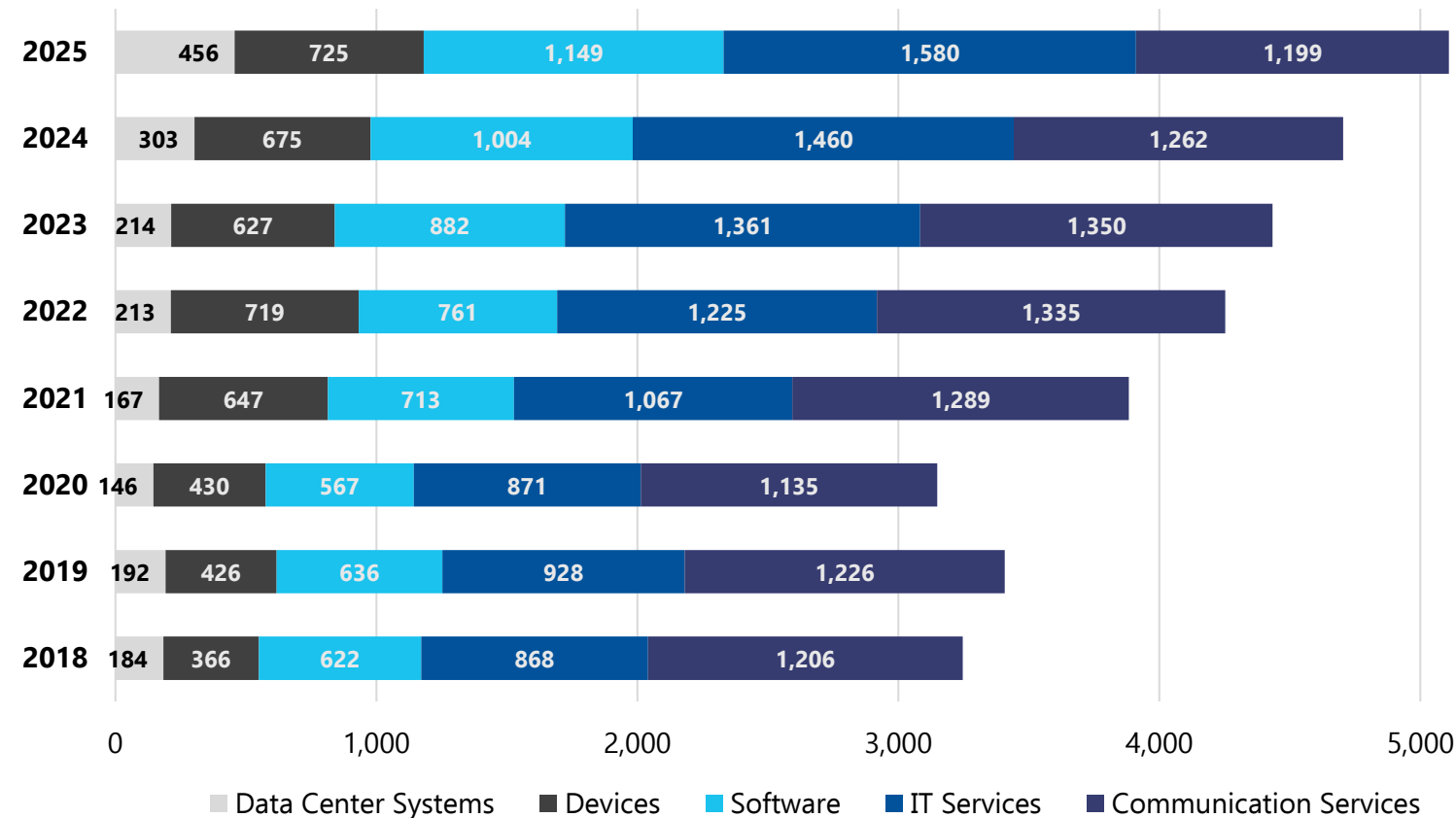
The top jobs trending in 2025 were the following:

- Data analyst and scientist
- AI and machine learning specialist
- Big Data specialist
- Digital marketing and strategy specialist
- Process automation specialist

Global ICT spending

Regarding global ICT spending, IT services and communication services receive the largest amounts of investments, as these services are the cornerstones of several business functions.

Global ICT spending by segment, 2018-2025 (billion EUR)



OUTLOOK ON GLOBAL ICT SPENDING



Global ICT spending is expected to reach **5.22 trillion EUR in 2026**, up **10.8% from 2025**



The **IT services** segment has **the most dynamic growth** during the analyzed period, with a **CAGR of 8.93%** between 2018-2025



The **software** segment's **CAGR** between 2018-2025 shows a growth of **9.16%**

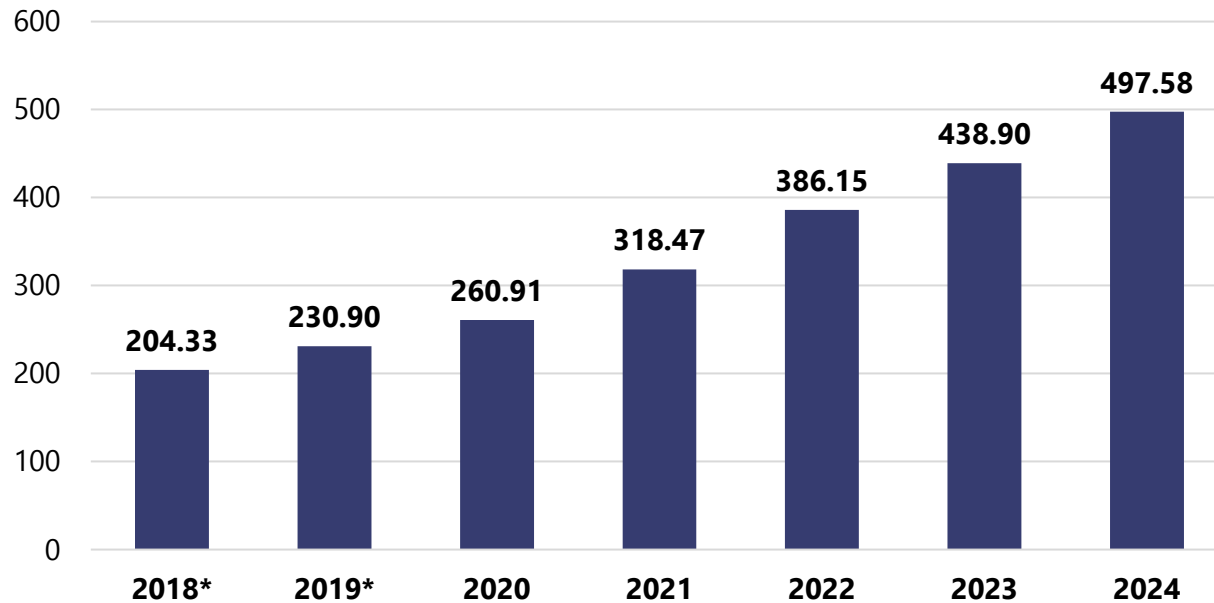


Digital transformation can be realized through **strategic spendings** on the **level of companies**

Global IT outsourcing

The IT outsourcing industry includes the external contracting of IT functions, services or projects instead of relying on company-owned resources, thus companies can focus on their core activities.

Global revenue of the IT outsourcing industry,
2018-2024 (billion EUR)



By **outsourcing IT tasks** to IT suppliers or software developers, companies can **focus on their core operations** and can **save internal resources and costs**.

TRENDS IN IT OUTSOURCING

Market growth



The global **IT outsourcing market** is projected to reach approximately **1.12 trillion EUR** by 2030, with a significant increase in spending on **IT services**, having a **CAGR** of **13.98%** between 2018-2030



Technological integration

The integration of **artificial intelligence** and **cloud computing** is transforming IT outsourcing practices



Cybersecurity and data protection

As cybersecurity threats grow, businesses are turning to **third-party vendors** for enhanced security capabilities



Outsourcing trends

Companies choose to outsource IT operations **to IT service providers on the long term**, one of the contributing factors being that IT staff with the desired skill sets are **challenging to retain**, they move towards technology provider companies

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ICT industry in Central and Southern Europe

The ICT industry in Romania can be analyzed thoroughly and compared to neighboring countries based on the "Future of IT Report 2024", including 13 countries from Central and Southern Europe.

IT Competitiveness Index

100%

IT Talent

40%

IT Infrastructure

20%

Business Environment

20%

Economic Impact

20%

INDICATORS FOR THE 13 COUNTRIES

Average salary in ICT

Number of ICT students

Output per employee in ICT

Value added per employee in ICT

13 COUNTRIES IN CENTRAL AND SOUTHERN EUROPE

Albania

Bosnia and Herzegovina

Bulgaria

Croatia

Czechia

Hungary

Moldova

Montenegro

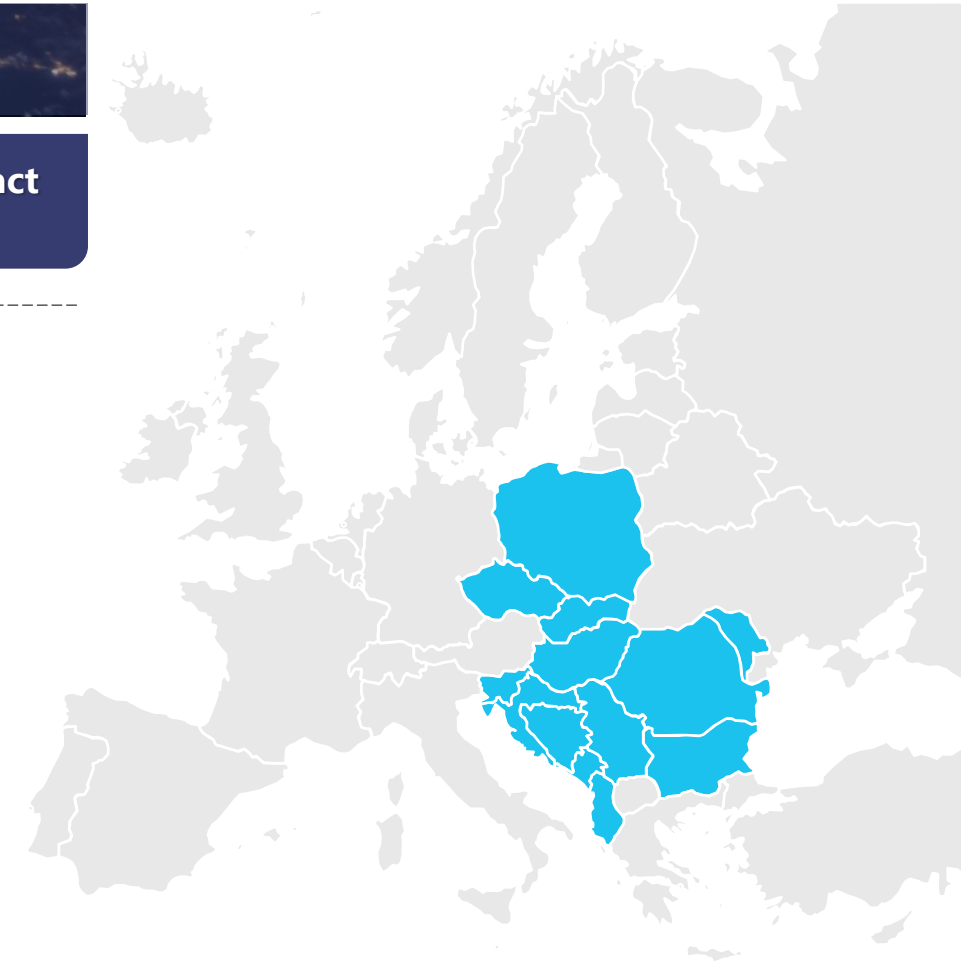
Poland

Romania

Serbia

Slovakia

Slovenia



Source: Emerging Europe

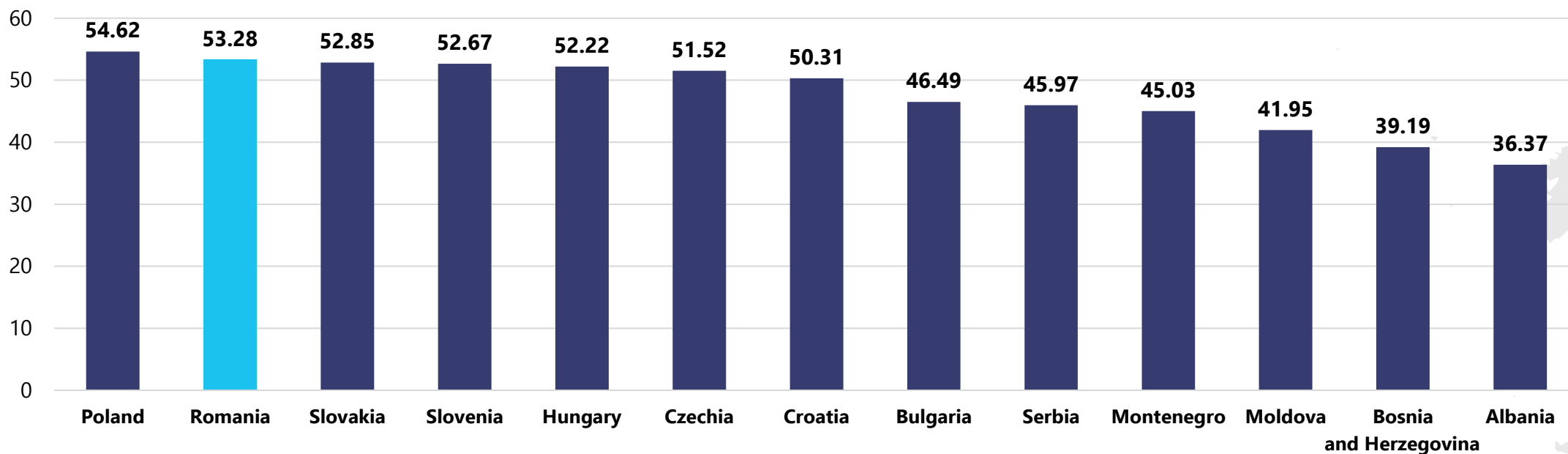
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IT Competitiveness Index in Central and Southern Europe

The IT Competitiveness Index for 2024 ranks a total of 23 countries based on a complex system of metrics. The 13 Central and Southern European ones can be seen below based on their IT competitiveness.

IT Competitiveness Index in Central and Southern Europe, 2024 (score)



In the analyzed region, **Romania** is the **2nd** most competitive state regarding IT competitiveness.

IT Competitiveness Index: Maximum Global Utility Method (based on 49 criteria)

$$\text{100\% IT Competitiveness Index} = \text{40\% IT Talent} \& \text{20\% IT Infrastructure} \& \text{20\% Economic Impact} \& \text{20\% Business Environment}$$

IT Competitiveness Index: Romanian Outlook

In terms of the elements comprising the IT Competitiveness Index, Romania ranks among the top three of the countries evaluated, excelling in both IT infrastructure and the economic impact on the sector.

IT Competitiveness Index in 2024 Romanian Outlook

IT Talent

Romania ranks 1st in the **International Mathematics Olympiad** among the analyzed countries and it is 2nd in the **EF English Proficiency Index** in 2024.

Rank: 5th place

IT Infrastructure

Romania's strength lies in its robust **data center infrastructure**, boasting **48 data centers** and ranking 1st in this category in Central and Southern Europe.

Rank: 1st place

Business Environment

Romania's government is actively supporting **start-up growth**, allocating 400 million EUR from the **National Recovery and Resilience Plan** for private equity funds.

Rank: 7th place

Economic Impact

Romania's 3rd place in the ranking relies on the countries' **rising exports** and excellent performance in **output** and **value added**, as well as its cost competitiveness.

Rank: 3rd place

Average monthly gross salary in ICT

2,479 EUR, the ICT sector offering higher-than-average salaries

Rank: 3rd place

Number of ICT students & graduates

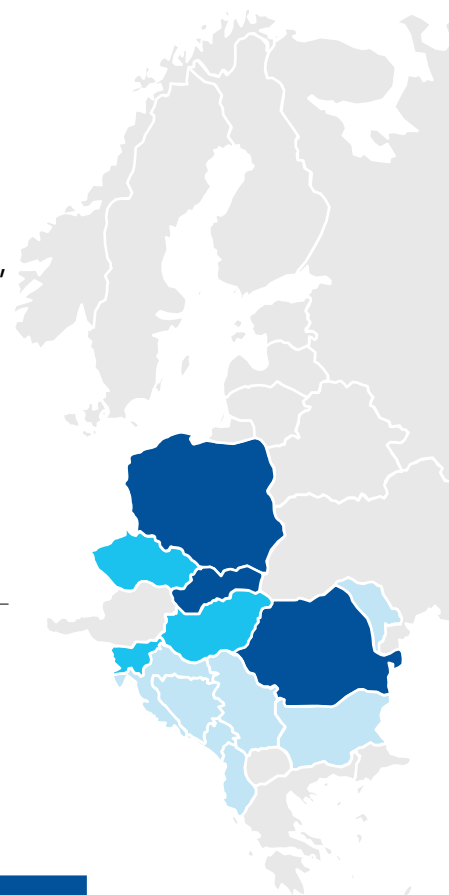
389 students per 100,000 of the total population of working age (15-64)

Rank: 8th place

Value added per employee in ICT

7,783 EUR per month, the sector growing between 2018-2022 due to increased exports

Rank: 1st place



Sources: Emerging Europe, EF English Proficiency Index

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Key trends in the Romanian IT industry

Romania's IT sector is thriving with a growing startup ecosystem, a strong focus on emerging technologies, and government-backed digitalization initiatives.

1.

Startup ecosystem

Romania has developed a vibrant startup ecosystem with over **1,500 startups**, business angels, VCs and PEs. The country is home to more than **100 incubators** and accelerators, alongside an active investor network of over **100 participants**.

2.

Diversification of services

Romanian companies offer a **wide range of IT services**, including web development, mobile app development, e-commerce development, user interface design and **IT strategy consulting**.

3.

Emerging technologies

There is a growing emphasis on the development of **AI, IoT and cybersecurity solutions**. The IoT market revenue in Romania is expected to reach nearly **2.6 billion EUR** by the end of 2026.

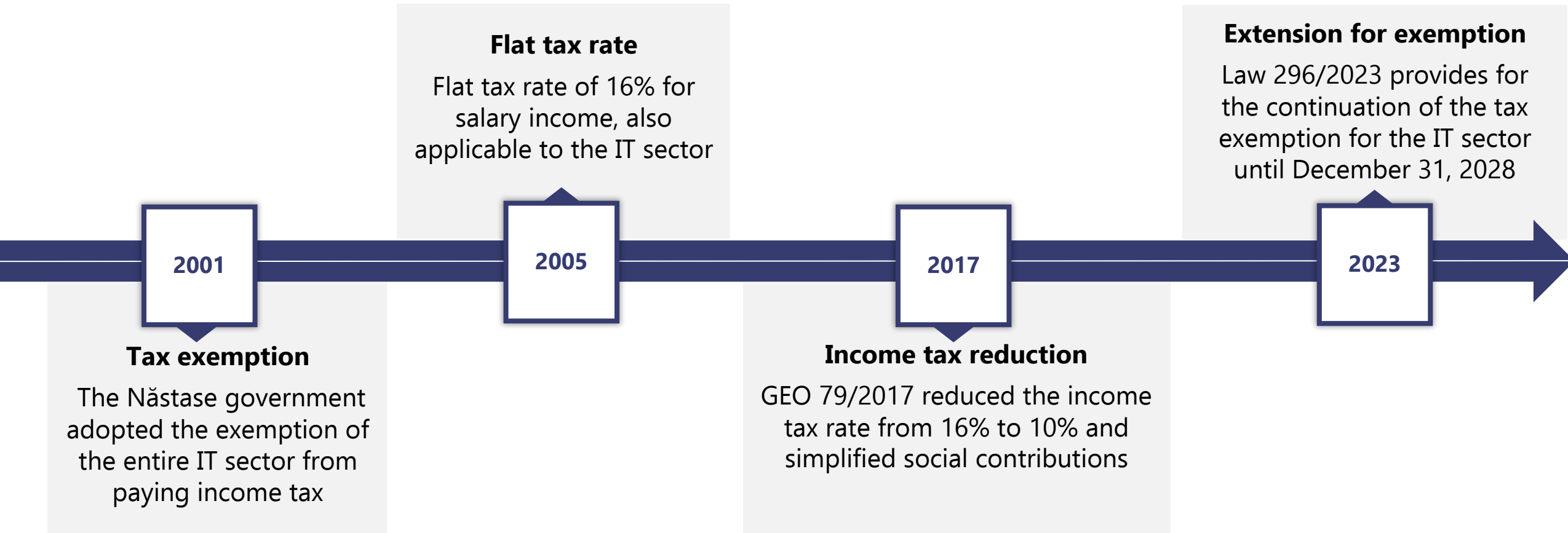
4.

Government initiatives

The **National Recovery and Resilience Plan** focuses on digital transformation, including public services digitalization, digital skills development and secure digital infrastructures.

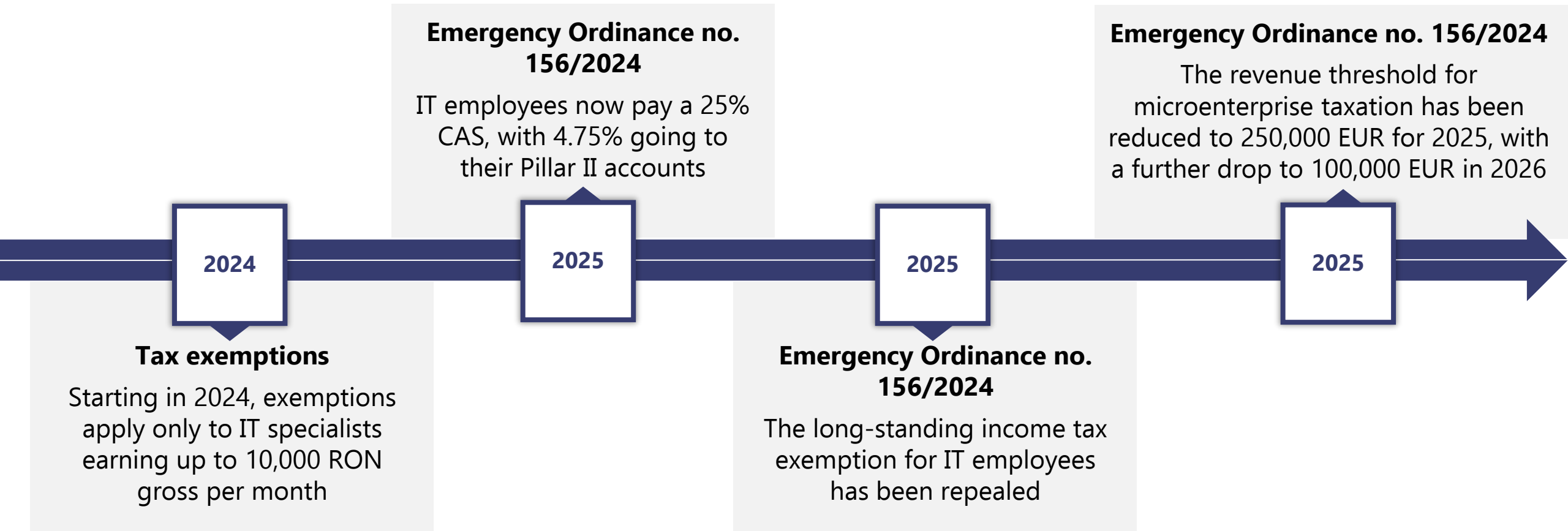
Key fiscal measures in the Romanian IT industry

There have been several Romanian fiscal initiatives helping the IT industry employees in the past 20 years, mainly related to tax reductions and exemptions.



Key fiscal measures in the Romanian ITC industry

Despite being regarded as generous, the measures have undergone several cuts and revisions since 2024, particularly through Emergency Ordinance No. 156/2024.



Segmentation of the Romanian ICT industry

The Romanian ICT industry is segmented into IT services, core software, communication services and other IT activities, with software and IT services being the dominant contributor.

Micro-sectors of the ICT industry



IT Services industry

Business Process Outsourcing

IT Consulting & Implementation

IT Outsourcing

Other IT Services

NACE gr. 622; 629



Software industry

Application development software

Enterprise software

Productivity software

System infrastructure software

NACE gr. 582; 621



Communication Services

Fixed Communications Services

Mobile Communications Services

NACE gr. 611-619



Consumer Electronics industry

Telephony

Computing

TV, Radio & Multimedia

Other

NACE gr. 261-264



Data Centers industry

Network infrastructure

Service

Storage

NACE gr. 631-639

Overview of the Romanian ICT industry

Romania's ICT industry is set to surpass €14B in total revenue by 2030, with segments growing at around 5% annually; signaling a mature yet dynamically expanding digital economy



The combined global market backdrop for these five sectors exceeds 3 trillion EUR in annual revenue.

Romania's ICT growth is not occurring in isolation; it is being pulled forward by a structural global shift toward cloud computing, AI adoption, and digital transformation.

Communication services

↑ 4.49%

2025

6.5B

EUR

2030 est.

8.1B

EUR

Consumer electronics

↑ 1.99%

2025

2.9B

EUR

2030 est.

3.2B

EUR

IT services

↑ 4.94%

2025

1.4B

EUR

2030 est.

1.7B

EUR

Software

↑ 5.22%

2025

384M

EUR

2030 est.

495M

EUR

Data centers

↑ 7.04%

2025

287M

EUR

2030 est.

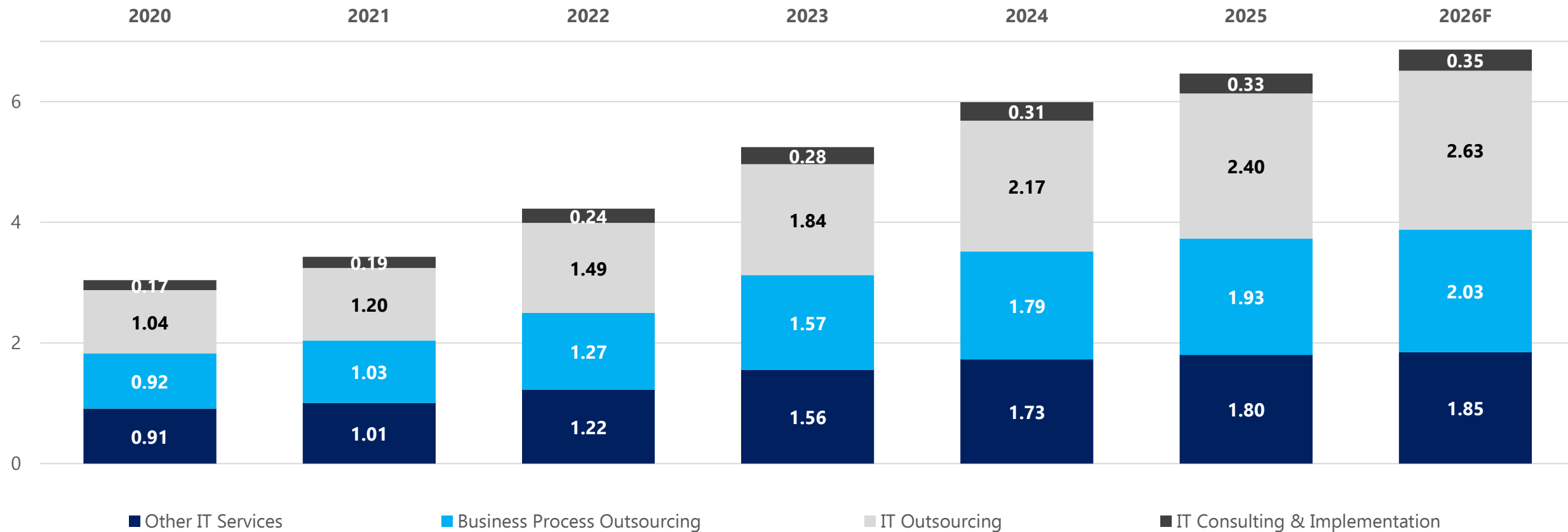
404M

EUR

Revenue growth in the Romanian IT services industry

Revenue in the IT services market is projected to reach 6.86 billion RON in 2026, IT outsourcing dominating the market with a projected market volume of 2.6 billion RON in 2026.

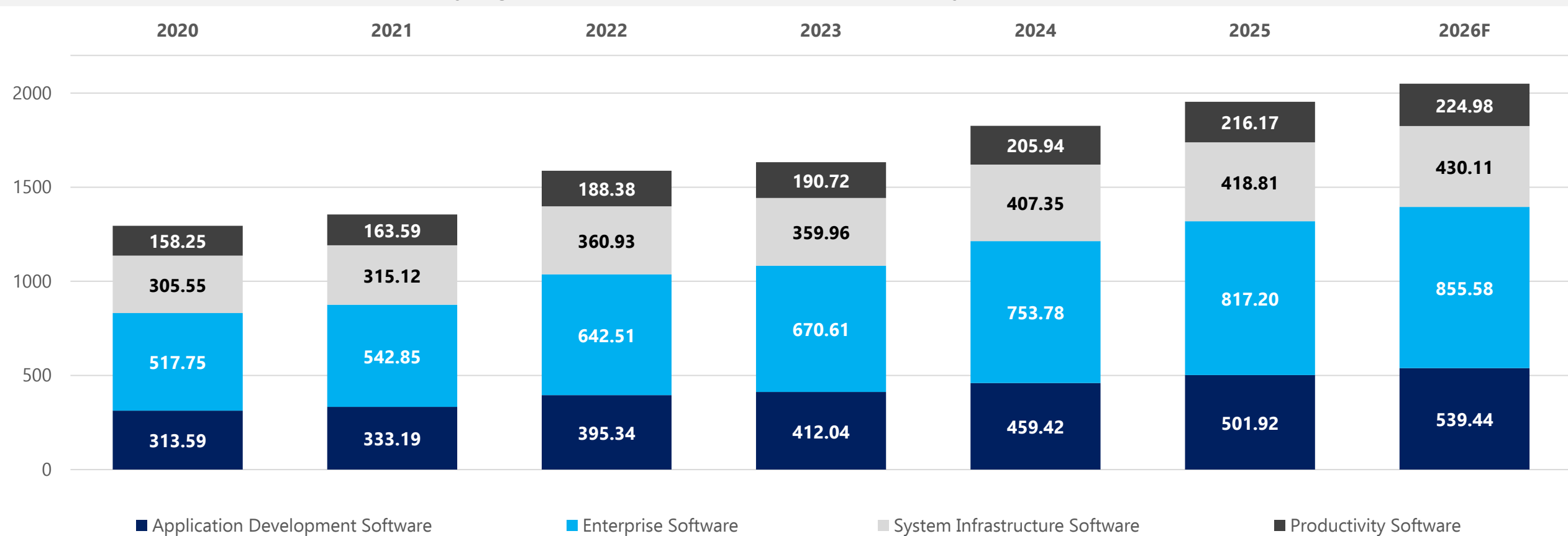
Revenue by segments in the Romanian IT Services industry, 2020-2026 (billion RON)



Revenue growth in the Romanian software industry

Romania has been experiencing steady economic growth in recent years, which has had a positive impact on the software market, out of which, enterprise software being the highest earning sector.

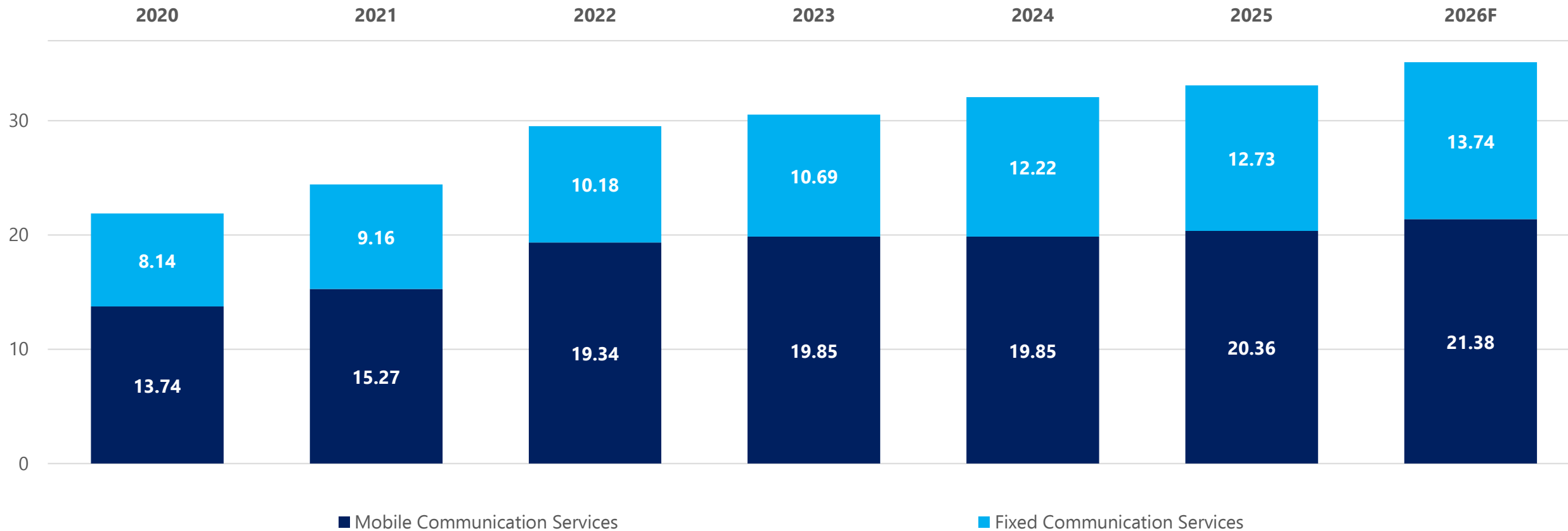
Revenue by segments in the Romanian Software industry, 2020-2026 (million RON)



Revenue growth in Romanian communication services

Revenue in the communications services market is projected to reach 35.1 billion RON in 2026, mobile communications dominating the industry with a projected market volume 21.38 billion RON in 2026.

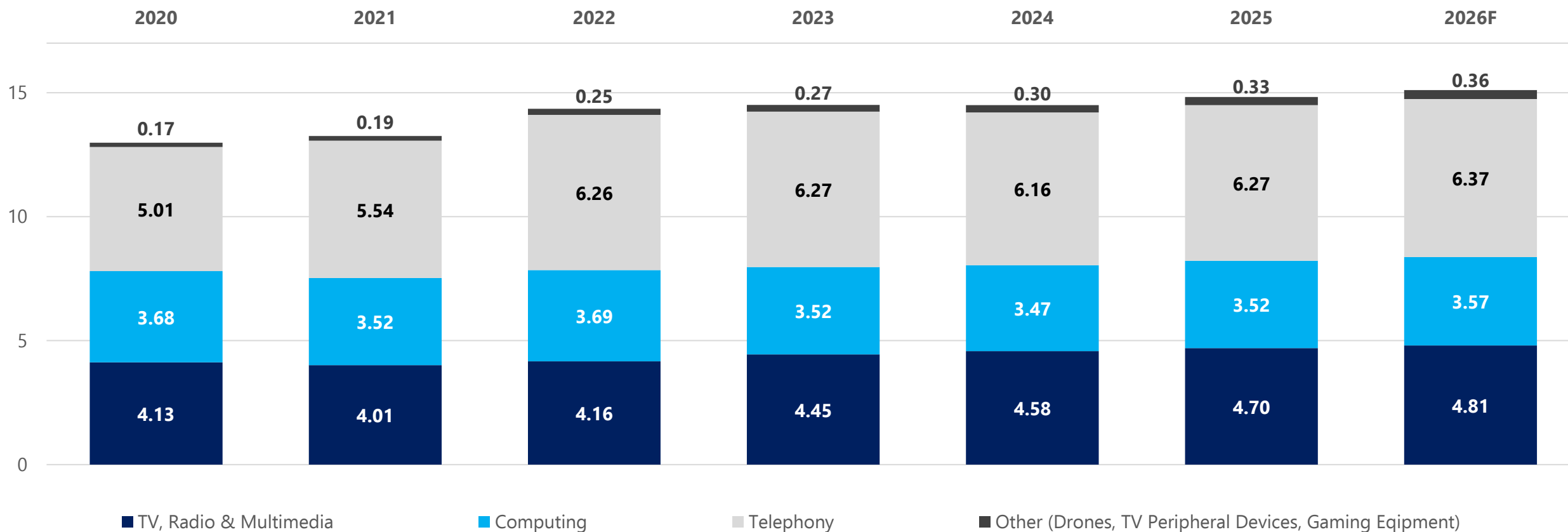
Revenue by segments in the Romanian Communication Services industry, 2020-2026 (billion RON)



Revenue growth in Romanian consumer electronics industry

Revenue in the consumer electronics market is projected to reach 15.1 billion RON in 2026, telephony dominating the industry with a projected market volume of 6.4 billion RON in 2026.

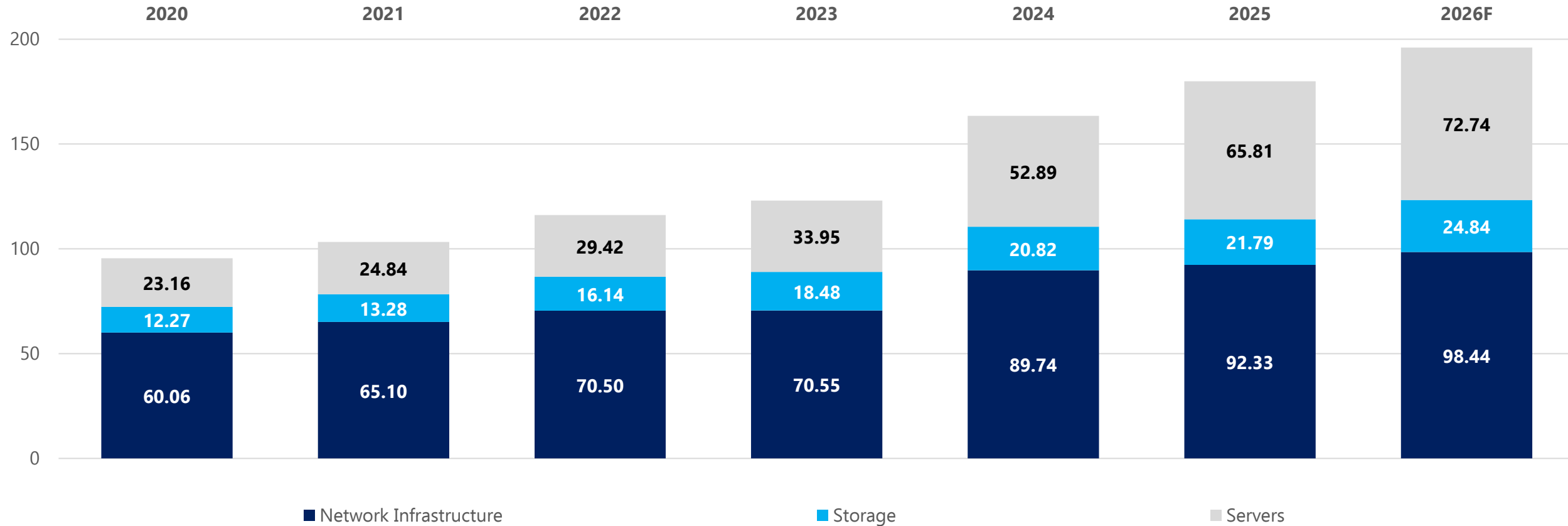
Revenue by segments in the Romanian Consumer Electronics/Devices industry, 2020-2026 (billion RON)



Revenue growth in Romanian data centers industry

Revenue in the data center market is projected to reach 1.5 billion RON in 2025, Network Infrastructure dominating the industry.

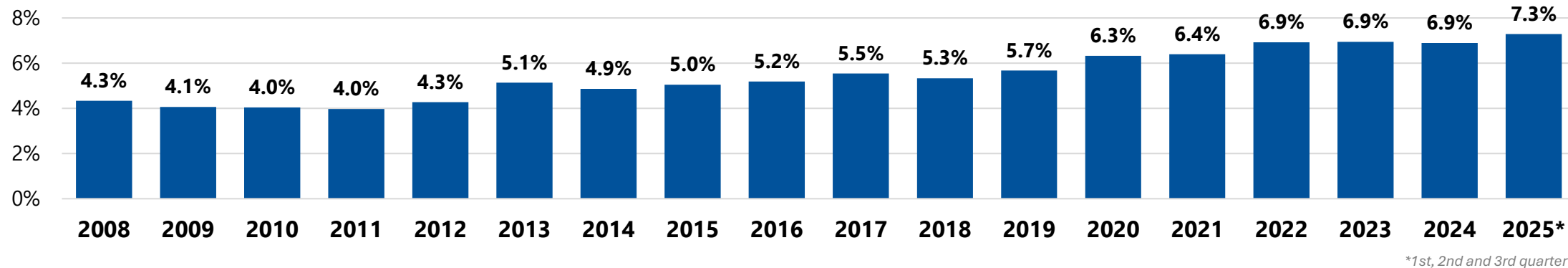
Revenue by segments in the Romanian Data Centers industry, 2020-2026 (million RON)



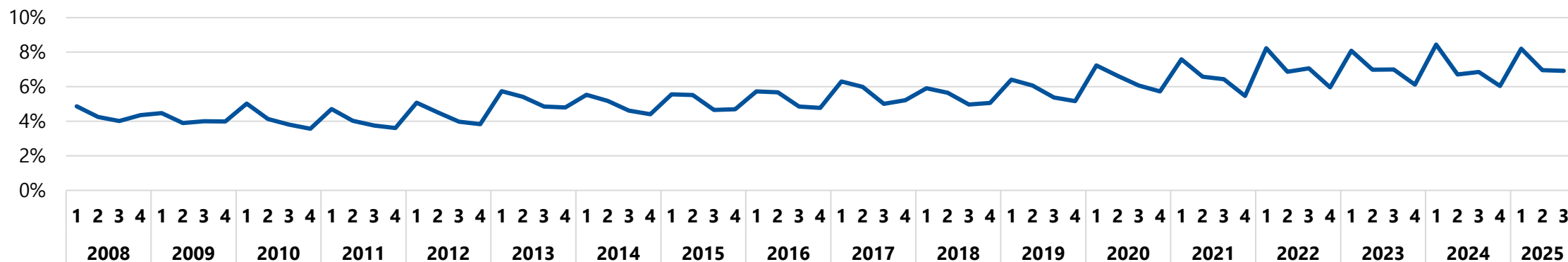
ICT value added as % of GDP

The share of ICT in Romania's GDP increased from 4.3% (2008) to 7.3% (2025).

Yearly ICT value added as % of GDP, 2008-2025

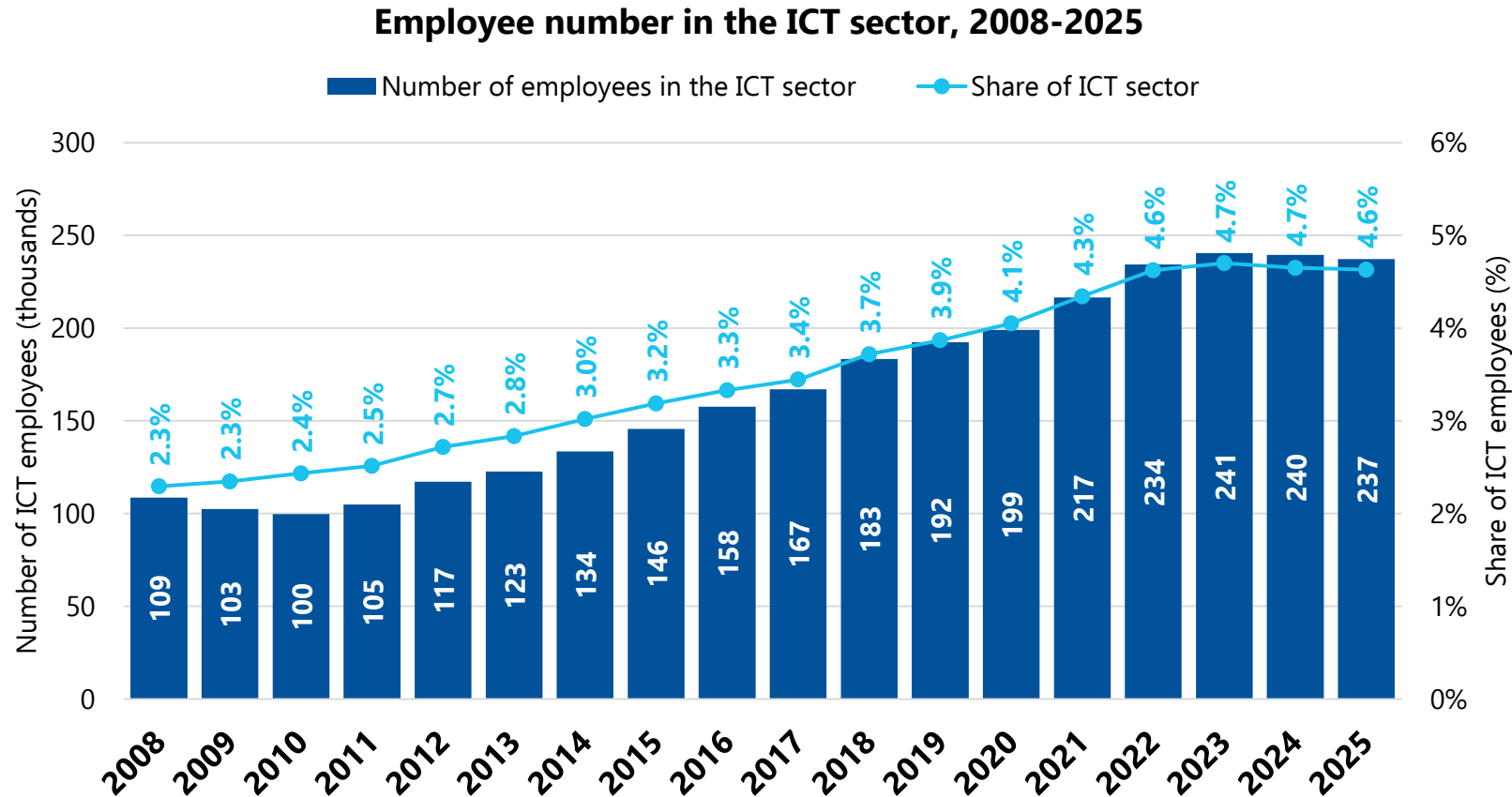


Quarterly ICT value added as % of GDP, 2008-2025



Number of employees in the ICT sector in Romania

The number of ICT employees in Romania grew significantly, reaching a peak of 241 thousand in 2023, but it decreased slightly to 237 thousand in 2025.



Methodological note

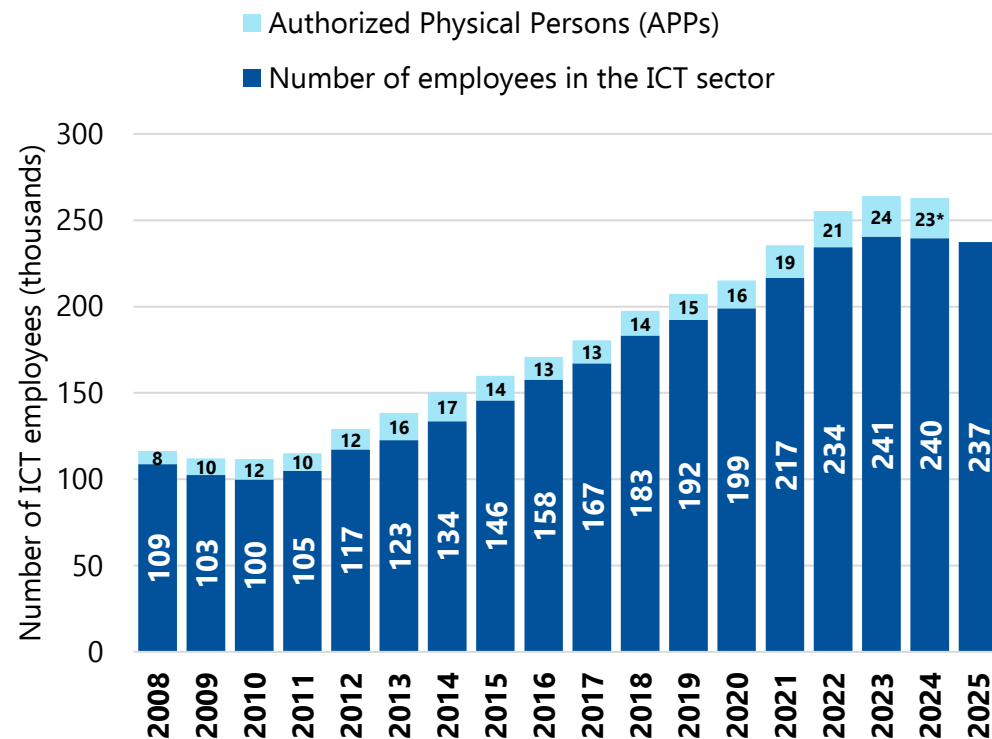
The **number of employees at the end of the reference period** includes all staff (including seasonal workers, managers, or administrators) employed under fixed- or open-term contracts, full- or part-time (including those with suspended contracts), recorded in the company's records at the end of the period.

The statistics do not include Authorized Physical Persons (APPs, known in Romanian as Persoane Fizice Autorizate - PFA), although their number is considerable.

Number of employees in the ICT sector in Romania

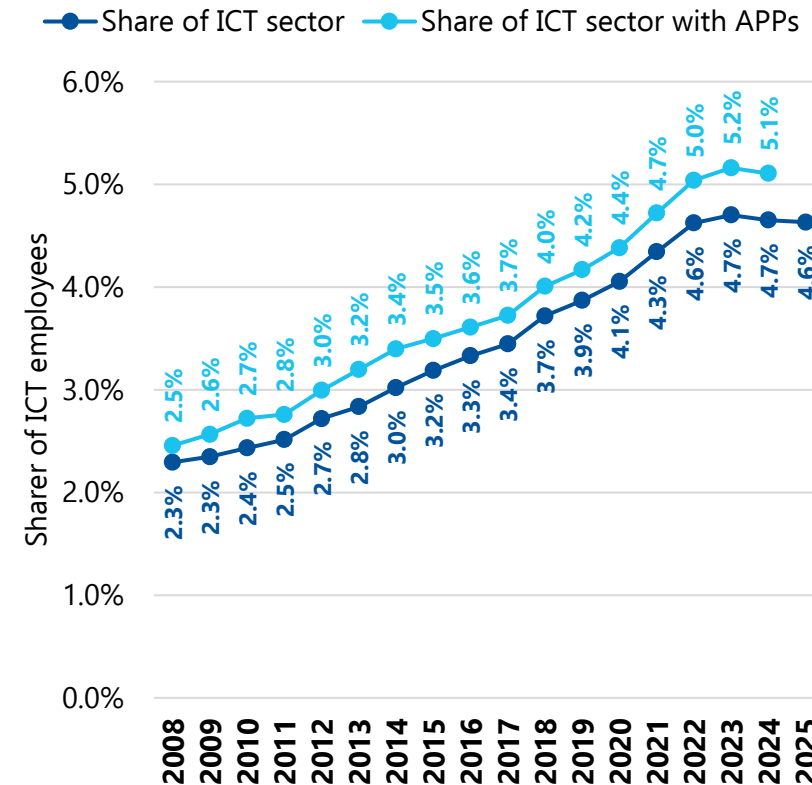
APPs account for approximately 10% of ICT employees. Altogether, around 265 thousand people worked in the ICT sector at its peak in 2023.

Number of employees in the ICT sector, 2008-2025



**Data for APPs for 2024 is an estimate based on 2023 data.
Data for APPs is not available for 2025.*

Share of ICT employees, 2008-2025



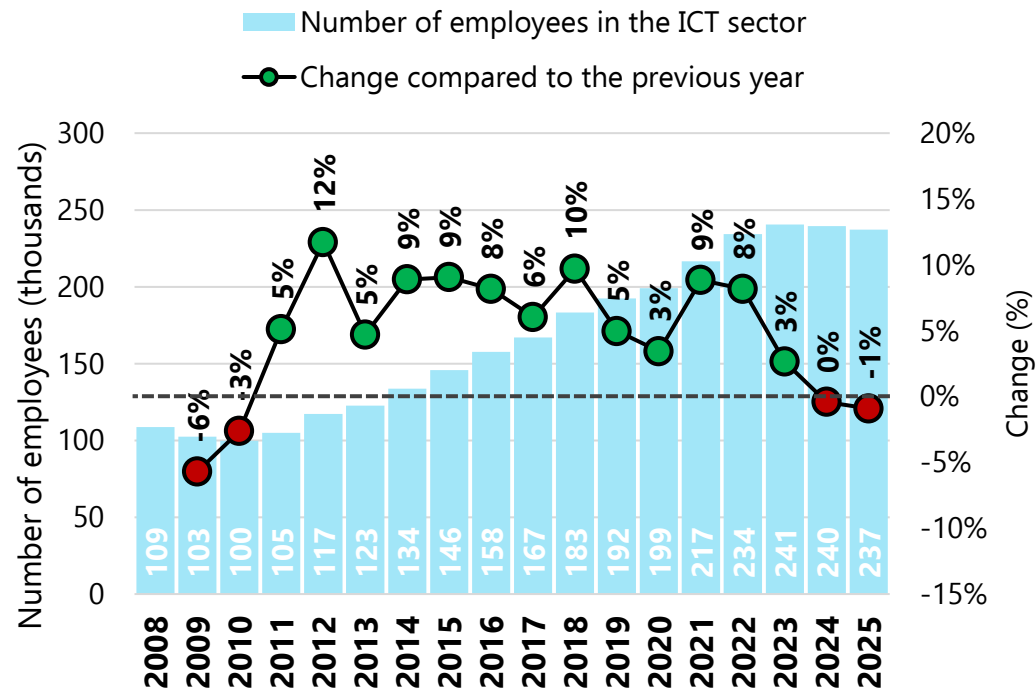
Methodological note

The **official number of employees slightly underestimates the actual number of ICT workers in Romania.** However, while the number of APPs is significant, the **combined total of employees from official statistics and APPs may overestimate the reality**, as an individual listed in the official statistics may also hold an APP, resulting in double counting.

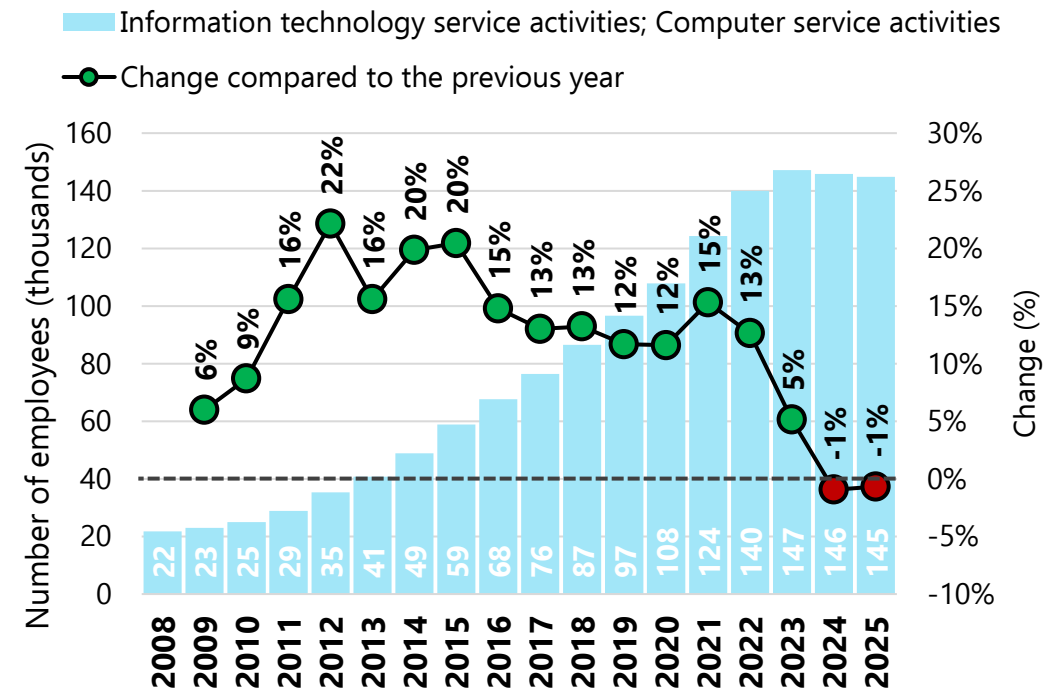
Negative employment growth rate in recent years

The latest data indicate a slowdown in the growth rate. While the number of employees continued to rise, it reached a peak in 2023 and then slightly decreased thereafter.

Number of employees in the ICT sector, 2008-2025



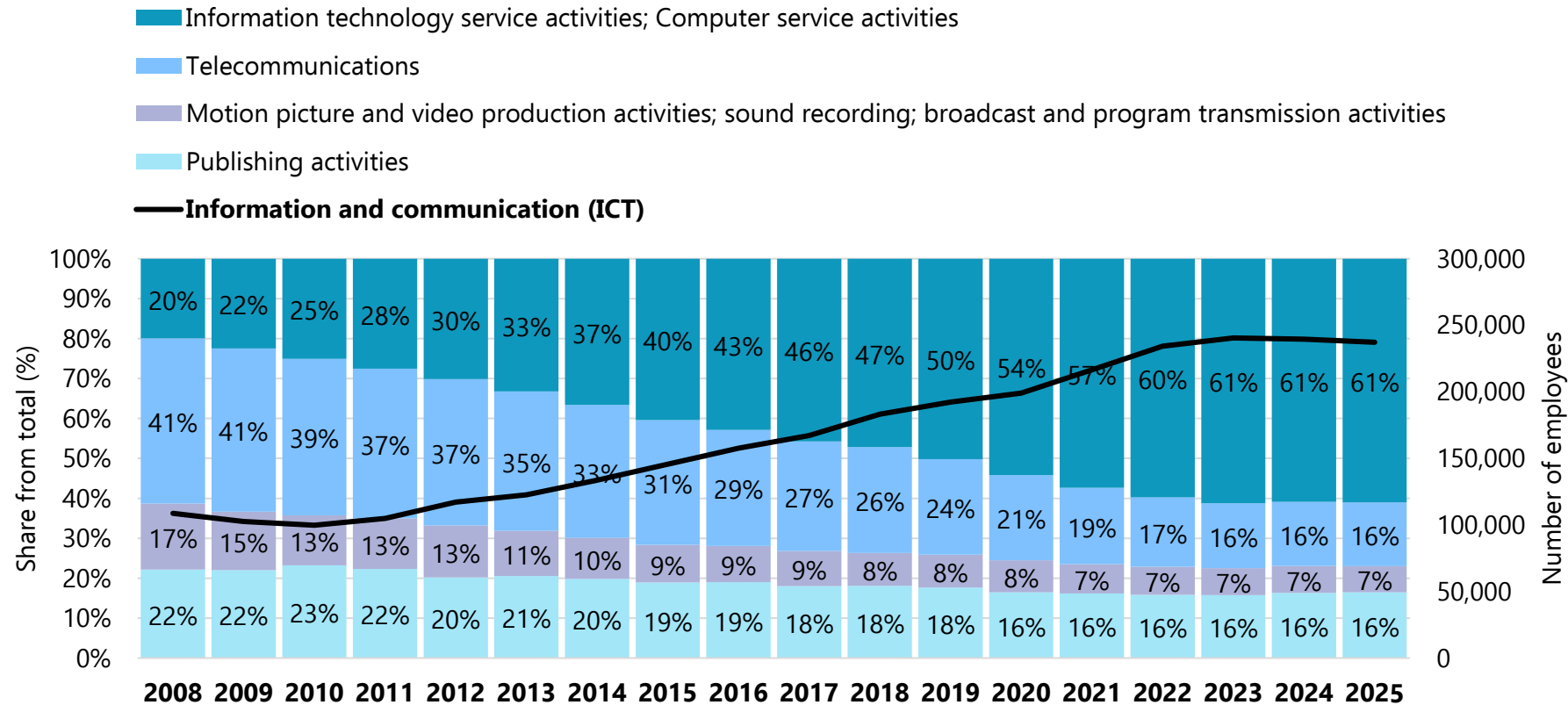
Number of employees in the IT sector, 2008-2025



Distribution of employees in the ICT sector in Romania

The share of IT employees in the overall ICT sector showed steady and dynamic growth from 2008 to 2023, then stabilized at around 61% over the next two years.

ICT employee number by subcategories, 2008-2025 (number of employees and %)



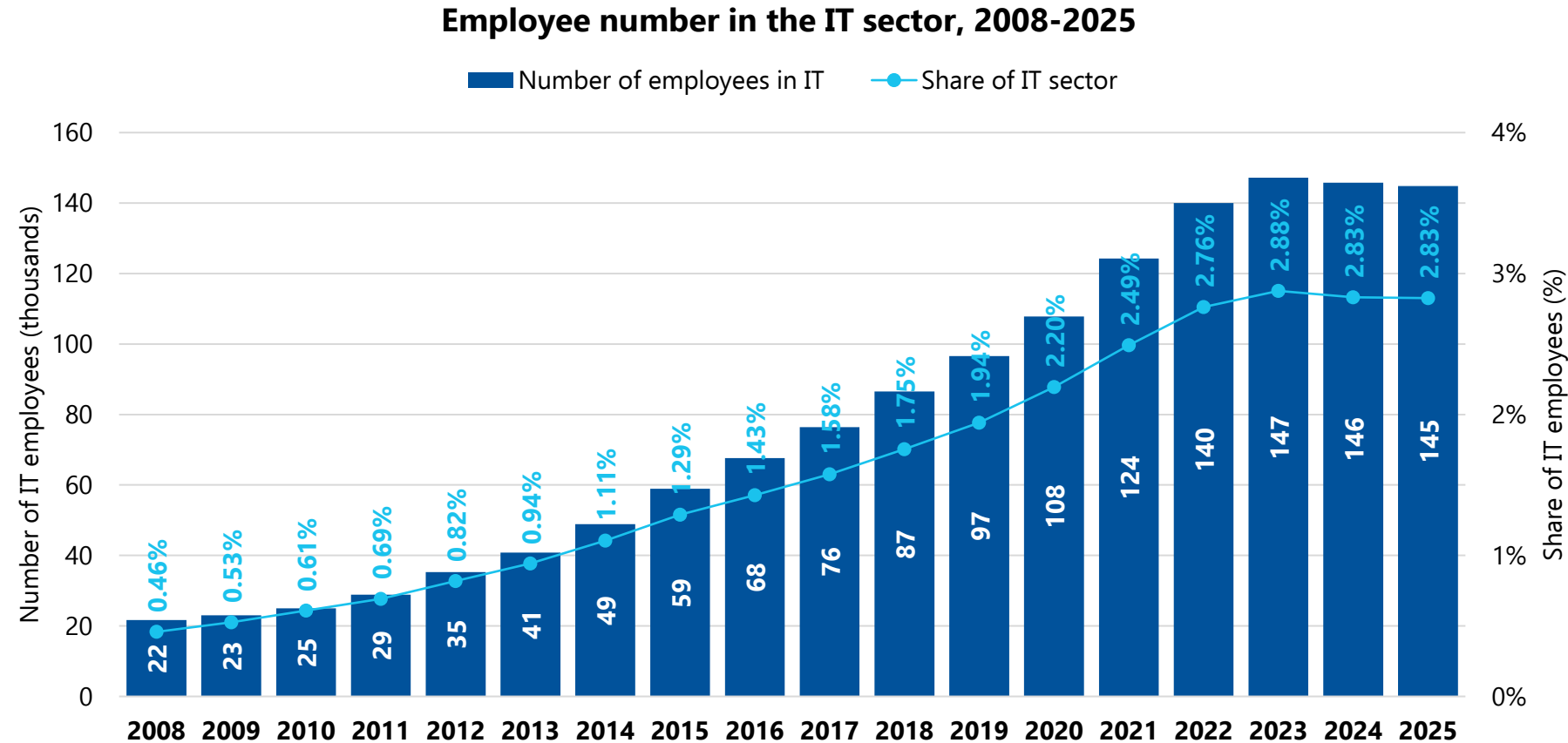
The share of IT also grew significantly, from 25% in 2008 to 61% in 2025.

Methodological note

The names of the subcategories in most cases clearly describe the activities of each category. However, "**Publishing activities**" can be a bit misleading, as it also includes coding processes, which overlaps with traditional publishing activities. For this reason, the salaries in this subcategory tend to be higher.

Number of employees in the IT sector in Romania

In Romania, the share of IT employees rose from 0.46% to 2.88% in 2023, then decreased slightly to 2.83% in 2025.



Methodological note

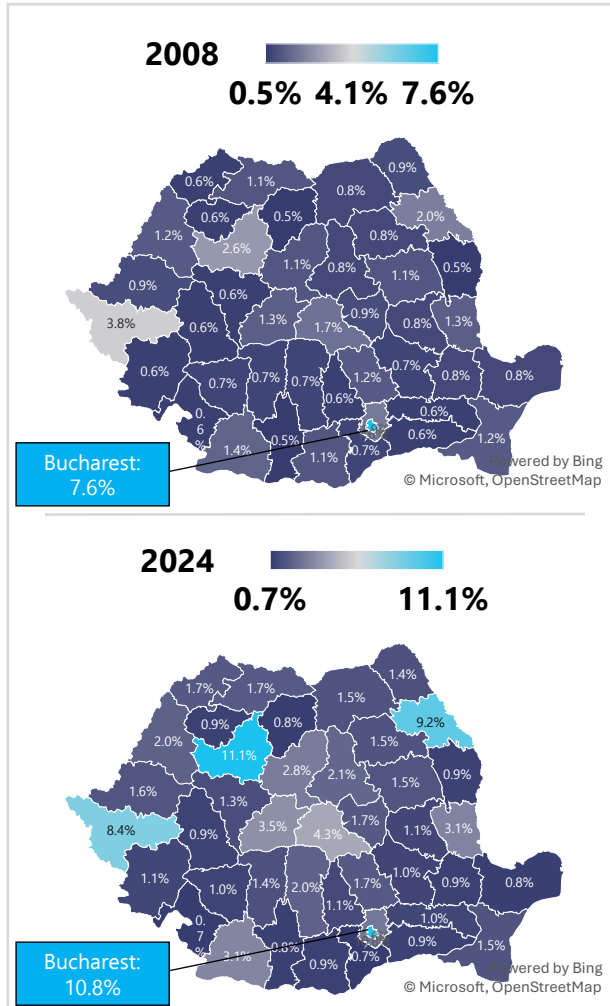
The ICT sector is a broader term that also includes the Communication sector.

When focusing solely on the IT part of the sector, a lower number of employees becomes apparent. In some

statistics, it is possible to narrow down to the IT segment, while in others, this is not feasible because only aggregated data for the entire ICT sector is available, without detailed subcategories.

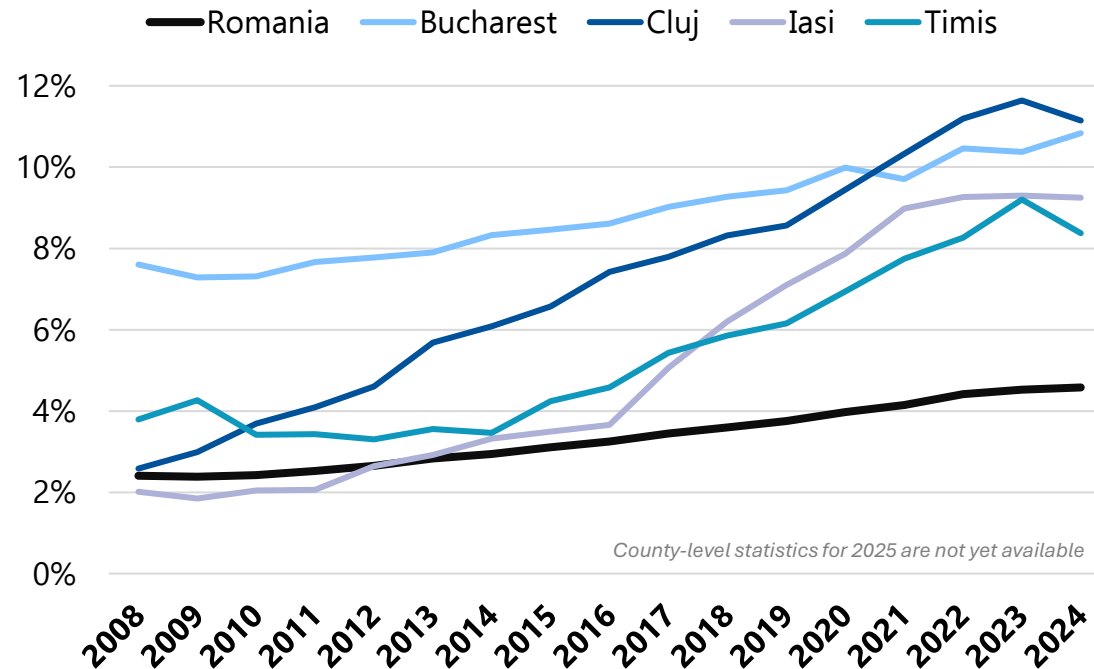
Share of employees in the ICT sector in Romania

The share of ICT workers is highest in the capital, Bucharest, followed by Cluj, Timiș, and Iași counties.



Although there have been differences between counties in the past, the **share of ICT workers in Cluj, Iasi and Timis counties has increased dinamically**.

Share of the average number of **ICT** employees (%)

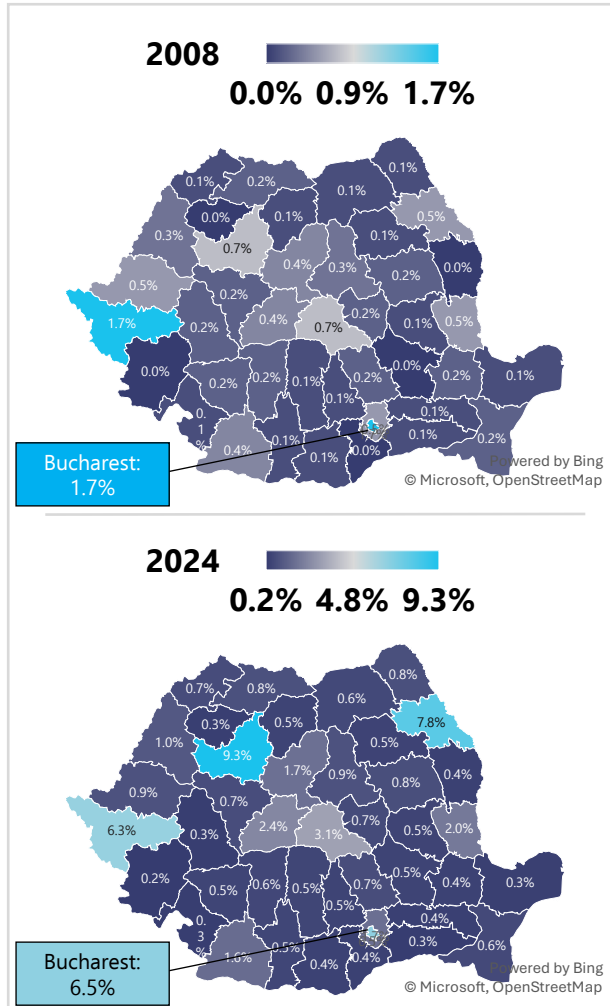


Methodological note

The average **number of employees** includes individuals employed under **fixed-term or open-ended employment contracts / relationships** (including seasonal workers, managers, or administrators) whose employment contracts / relationships were not suspended during the reference period.

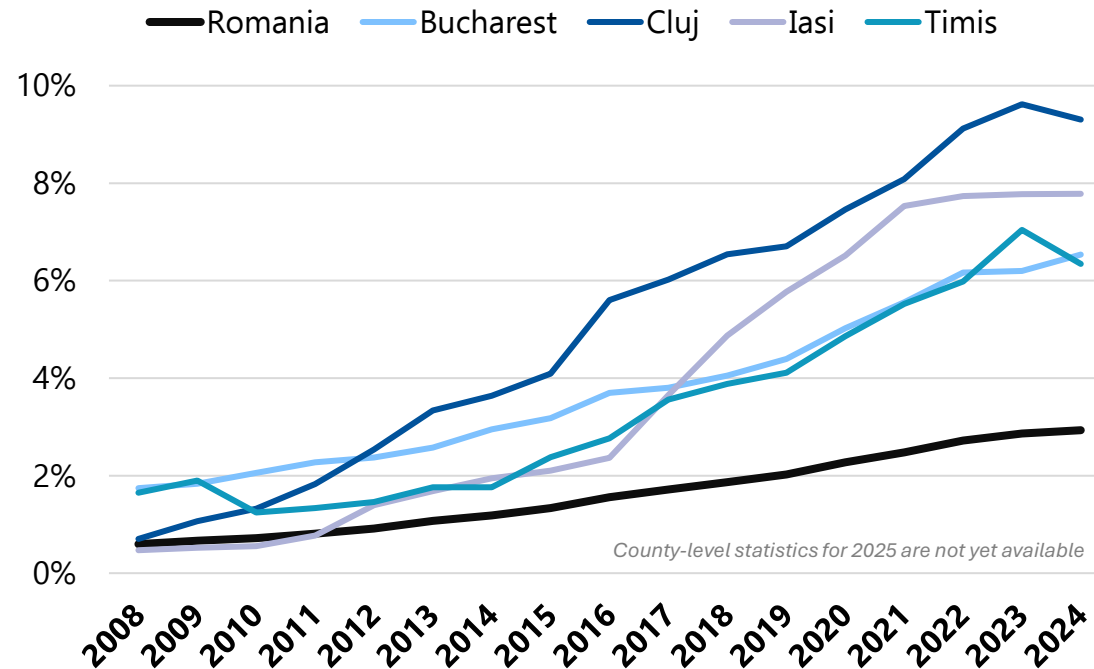
Share of employees in the IT sector in Romania

Focusing on the core IT sector, the dominance of the capital and the three counties (Cluj, Timis, and Iasi) is even more visible. Cluj has significantly surpassed them in the last 15 years.



The rise of **IT employment** has helped some (already more developed) counties to develop further. However, this also creates a **risk if IT activities decline in the future**, heavily IT-based counties having to turn to new sources of growth.

Share of the average number of **IT** employees (%)

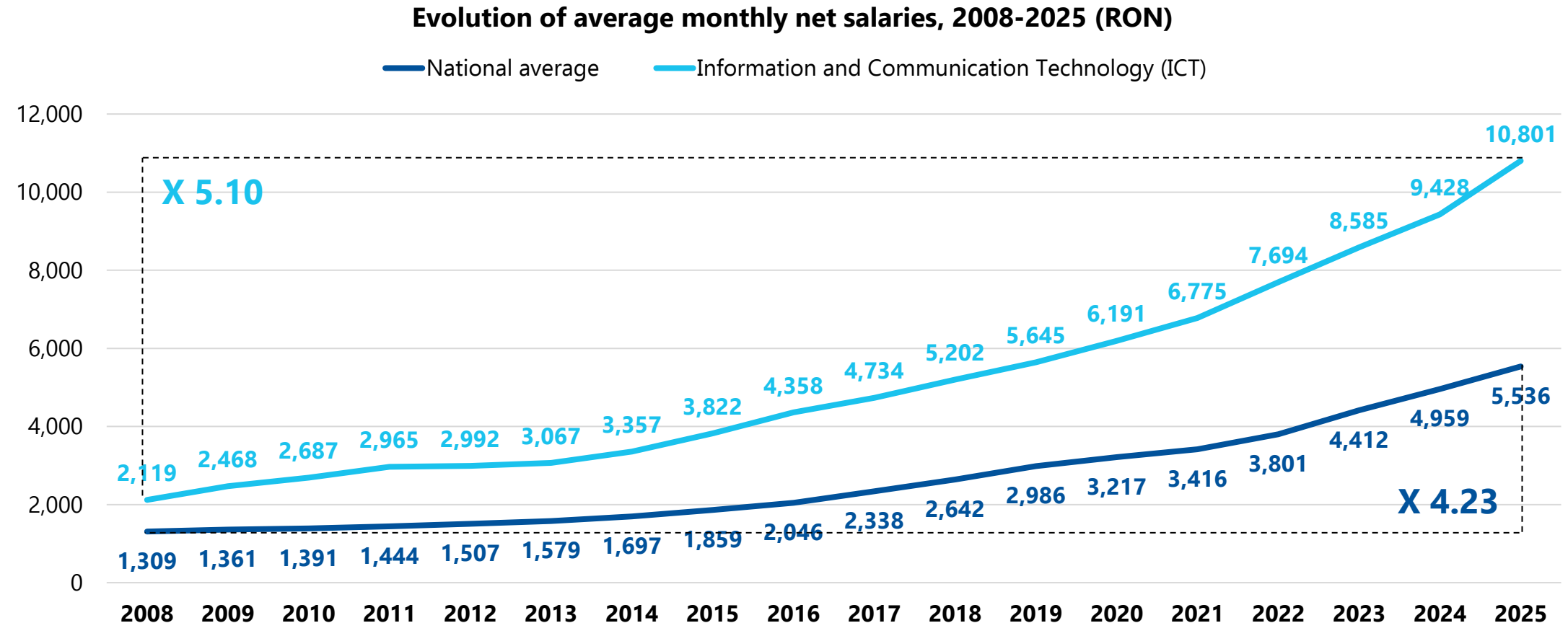


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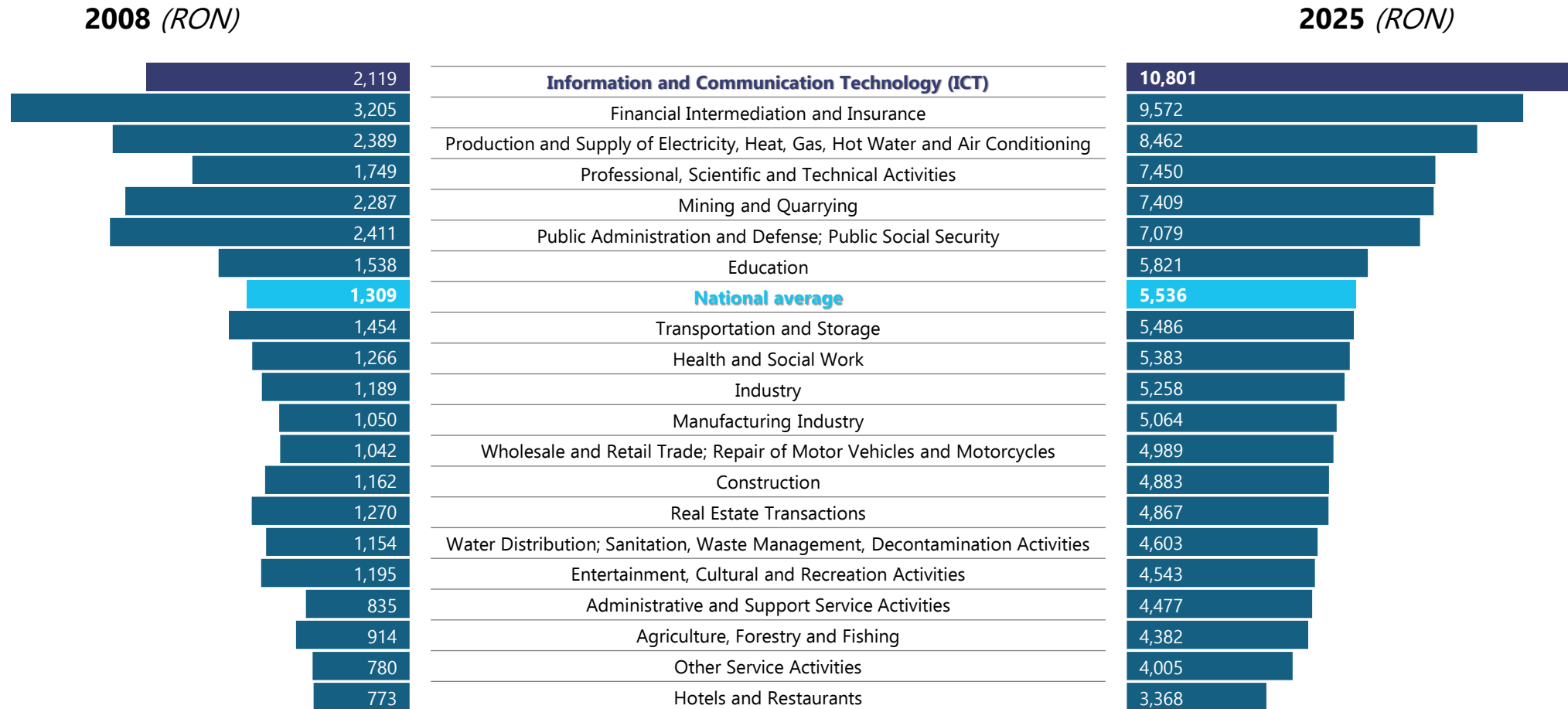
Average monthly net salaries in the ICT sector (RON)

Monthly salaries in the ICT sector have increased more than the national average, despite already starting from a higher level.



Average monthly net salaries in the ICT sector in comparison

The ICT sector has historically offered salaries exceeding the national average, but it now provides the highest salaries in the country.



Average monthly net salaries in the ICT sector in comparison

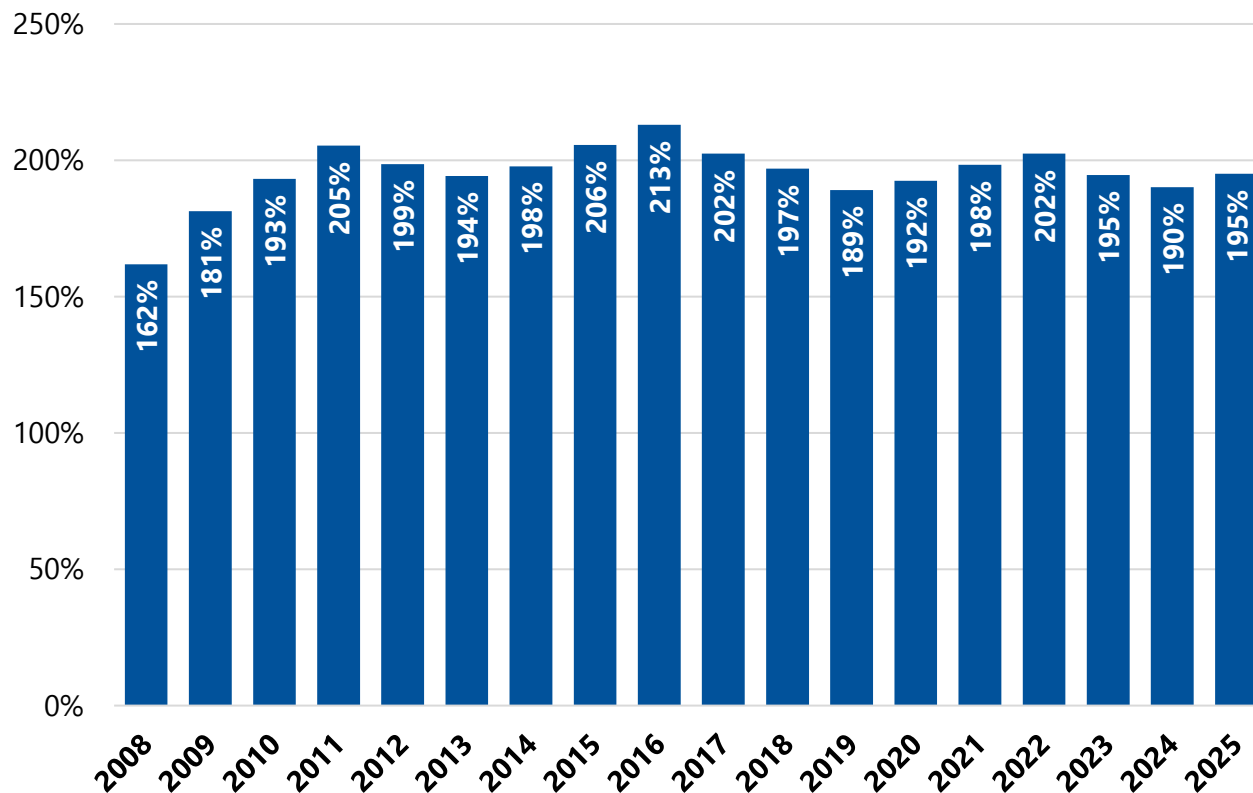
The ICT sector has historically offered net salaries higher than the national average, but it now provides the highest salaries in the country.

Sector / Average monthly net salary (RON)	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
National average	1309	1361	1391	1444	1507	1579	1697	1859	2046	2338	2642	2986	3217	3416	3801	4412	4959	5536
Agriculture, Forestry and Fishing	914	1007	1024	1044	1093	1179	1270	1371	1621	1858	2138	2277	2412	2645	3251	3709	3972	4382
Industry	1189	1300	1388	1470	1541	1604	1720	1827	1987	2202	2438	2710	2894	3132	3580	4198	4661	5258
Mining and Quarrying	2287	2360	2435	2577	2786	2943	3260	3454	3410	3667	3789	4276	4552	4921	5475	6272	6888	7409
Manufacturing Industry	1050	1146	1237	1324	1393	1466	1578	1704	1883	2105	2342	2597	2757	2996	3441	4043	4480	5064
Production and Supply of Electricity, Heat, Gas, Hot Water and Air Conditioning	2389	2573	2671	2787	2904	2917	3093	3077	3225	3436	3815	4384	4832	5187	5984	7147	7834	8462
Water Distribution; Sanitation, Waste and Decontamination Activities	1154	1241	1256	1333	1388	1427	1509	1575	1741	1966	2221	2432	2648	2770	3088	3583	4137	4603
Construction	1162	1069	1125	1247	1193	1191	1240	1422	1525	1695	1924	2807	3065	3311	3503	4331	4747	4883
Wholesale and Retail Trade; Repair of Motor Vehicles and Motorcycles	1042	1047	1166	1227	1305	1293	1412	1588	1736	2017	2228	2389	2609	2806	3222	3764	4168	4989
Transportation and Storage	1454	1518	1557	1580	1624	1629	1707	1863	1994	2223	2450	2742	2907	3064	3466	4289	4835	5486
Hotels and Restaurants	773	799	786	841	850	898	958	1080	1232	1424	1565	1726	1762	1881	2165	2570	2934	3368
Information and Communication Technology (ICT)	2119	2468	2687	2965	2992	3067	3357	3822	4358	4734	5202	5645	6191	6775	7694	8585	9428	10801
Financial Intermediation and Insurance	3205	3109	3200	3435	3587	3645	3708	4004	4061	4310	4532	4980	5315	5576	6273	7207	8112	9572
Real Estate Transactions	1270	1193	1182	1268	1248	1349	1344	1516	1822	1937	2125	2481	2524	2449	2748	3270	3698	4867
Professional, Scientific and Technical Activities	1749	1870	1915	2061	2216	2351	2442	2748	3012	3131	3462	3938	4143	4401	4795	5363	6017	7450
Administrative and Support Service Activities	835	873	940	966	1030	1132	1261	1427	1613	1869	2077	2290	2457	2568	2911	3478	3910	4477
Public Administration and Defense; Public Social Security	2411	2159	1968	1909	2102	2420	2754	2893	3084	3842	4407	4948	5212	5278	5568	6225	7199	7079
Education	1538	1596	1380	1316	1371	1533	1733	1886	2035	2387	2821	3396	3574	3572	3838	4621	5718	5821
Health and Social Work	1266	1342	1226	1210	1315	1456	1496	1656	2065	2672	3388	3717	4003	4084	4160	4427	5058	5383
Entertainment, Cultural and Recreation Activities	1195	1249	1103	1076	1148	1216	1249	1385	1589	2007	2236	2587	2723	2912	3218	3612	4004	4543
Other Service Activities	780	818	824	852	929	991	1141	1297	1392	1554	1752	1903	2024	2159	2380	2822	3239	4005

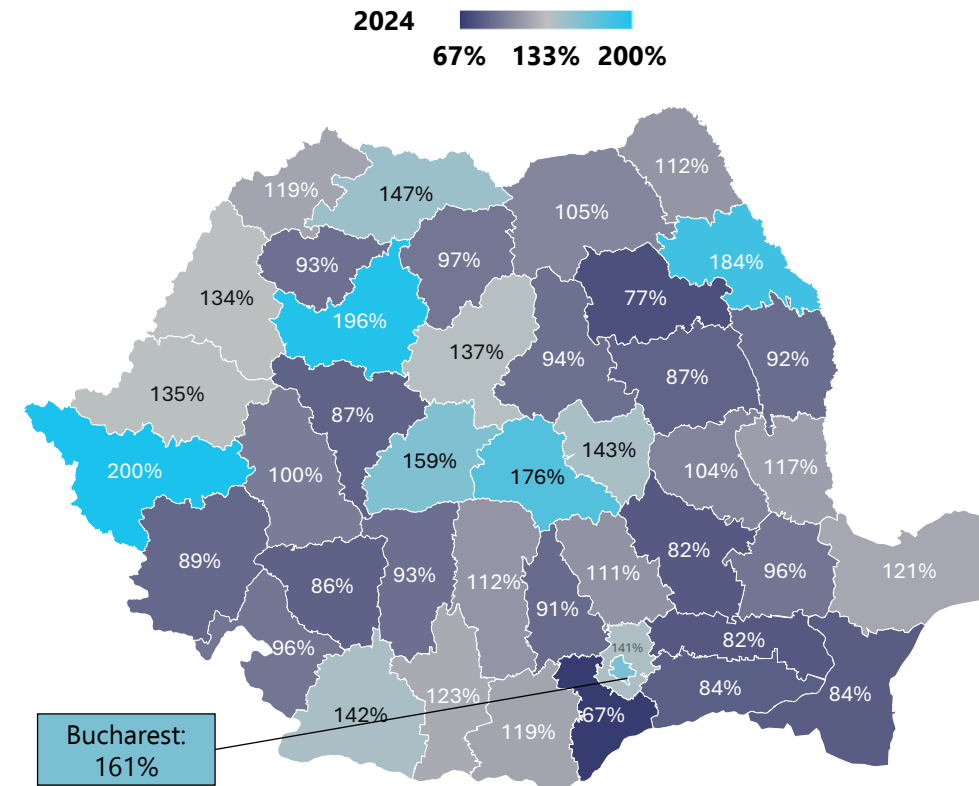
ICT vs national average monthly net salary

ICT salaries are currently roughly twice as high as the national average, the difference being mostly visible in counties with high ICT employment.

Average monthly net salaries in ICT sector vs national average monthly salary, 2008-2025 (%)



Average monthly net salaries in ICT vs national average monthly net salary, 2024 (%)

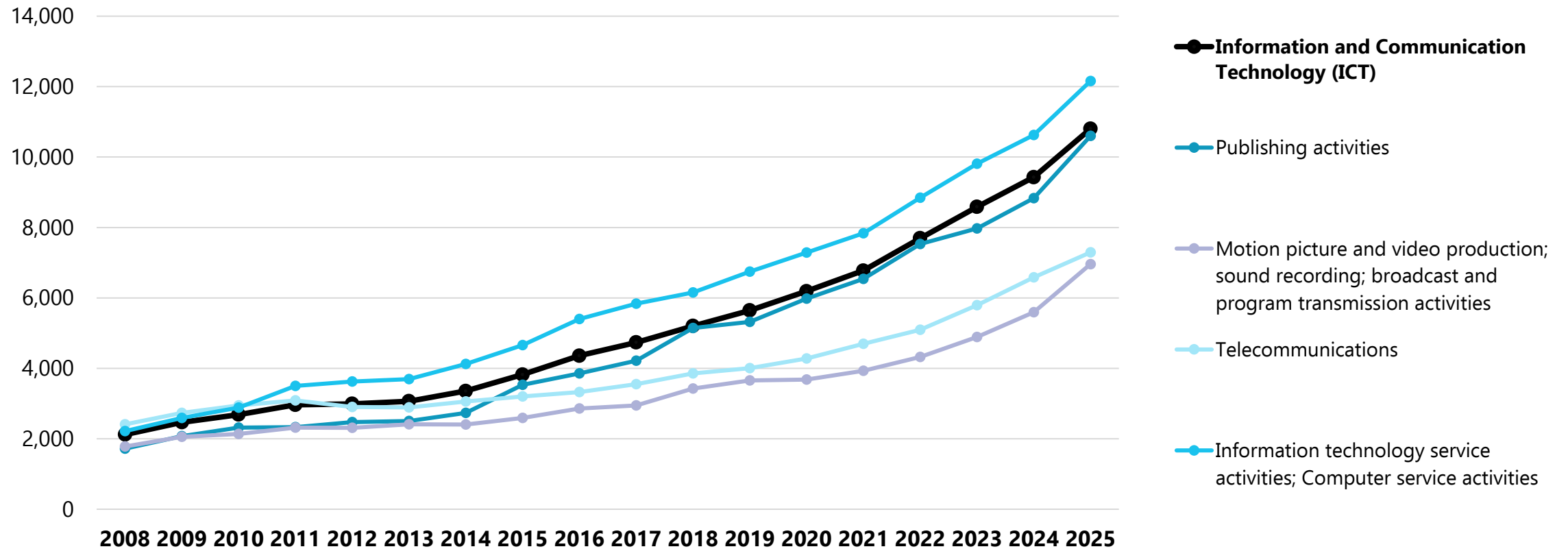


County-level statistics for 2025 are not yet available

ICT average monthly net salaries by categories (RON)

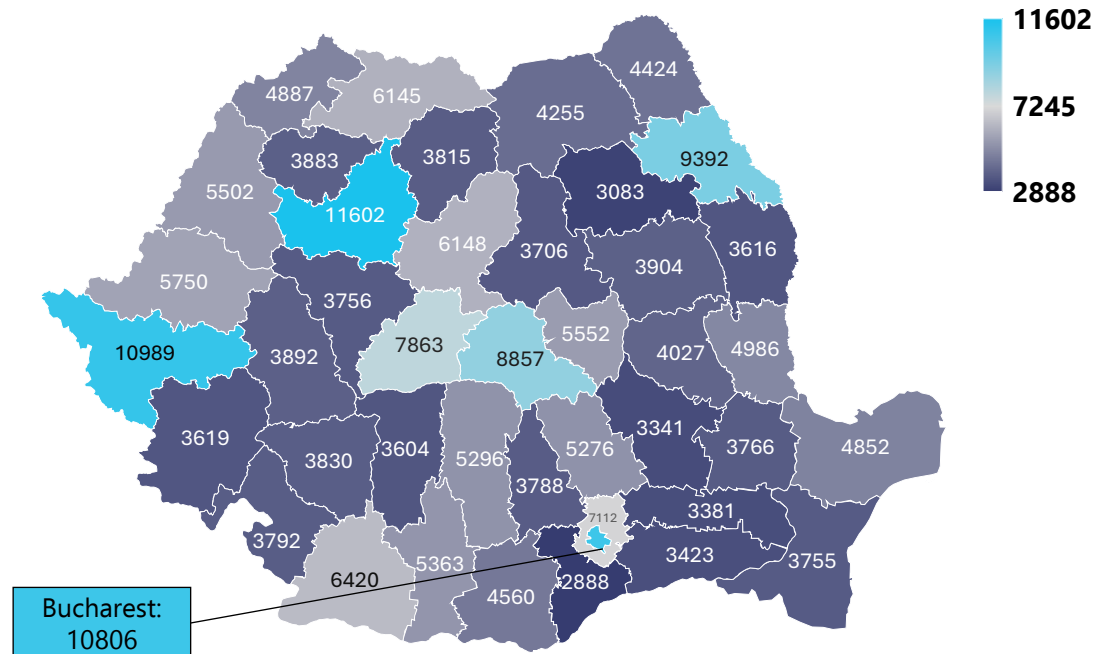
Higher value-added activities, notably IT and computer service activities offer relatively higher net salaries.

Evolution of the ICT average monthly net salaries by categories, 2008-2025 (RON)



Salaries in the ICT sector have grown significantly in some counties, leading to a larger gap between counties. In 2008, the ratio of the highest and lowest was 288%, but by 2024, it had increased to 402%.

ICT average monthly net salaries by counties, 2024 (RON)

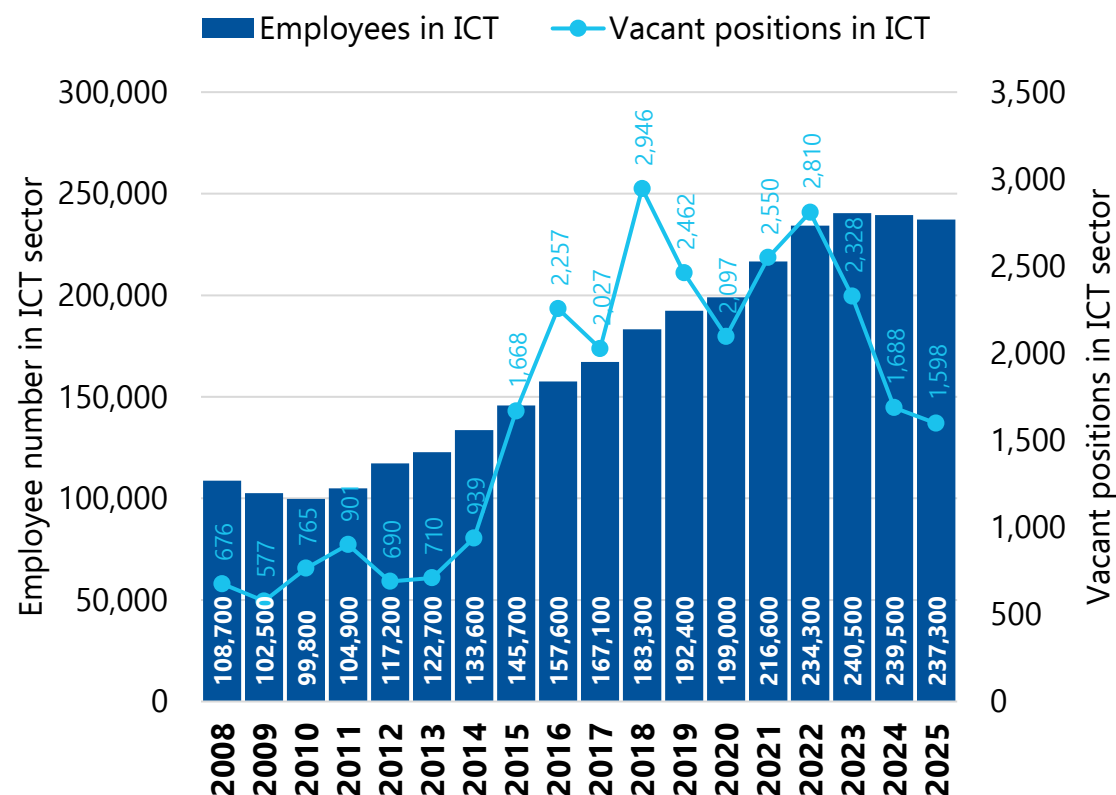


Source: National Institute of Statistics (Romania)

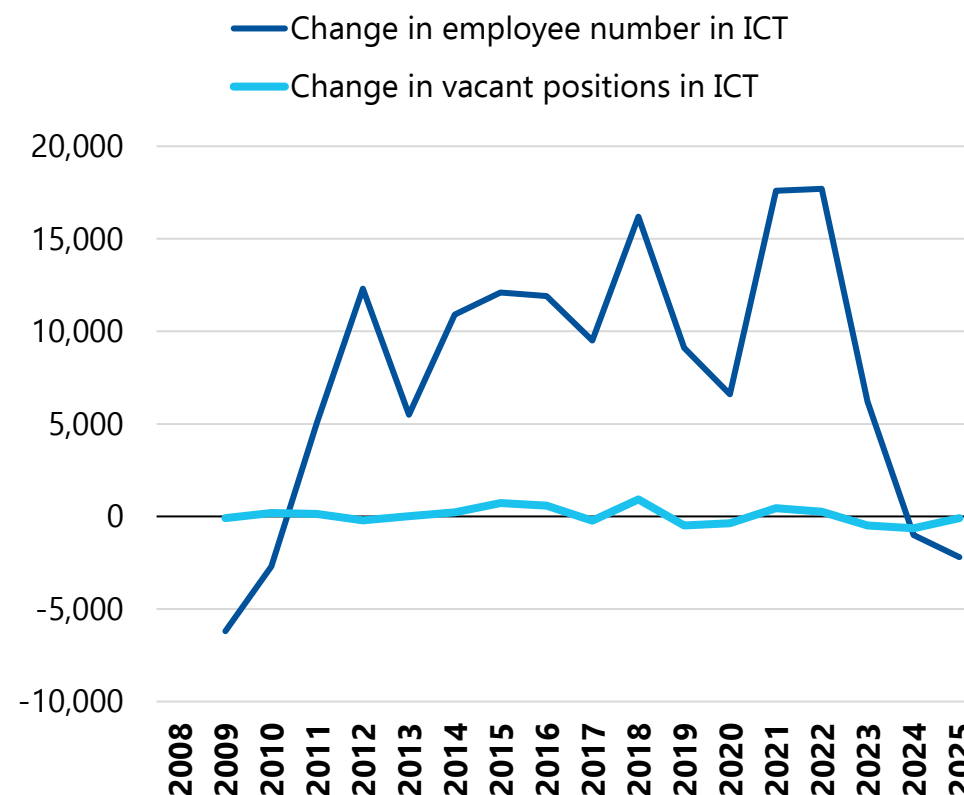
Vacant positions in the ICT sector

A decrease in vacant positions could indicate multiple factors, such as lower demand for ICT professionals as well as a decline in the size of the industry in Romania.

Employee numbers and vacant positions in the ICT sector, 2008-2025



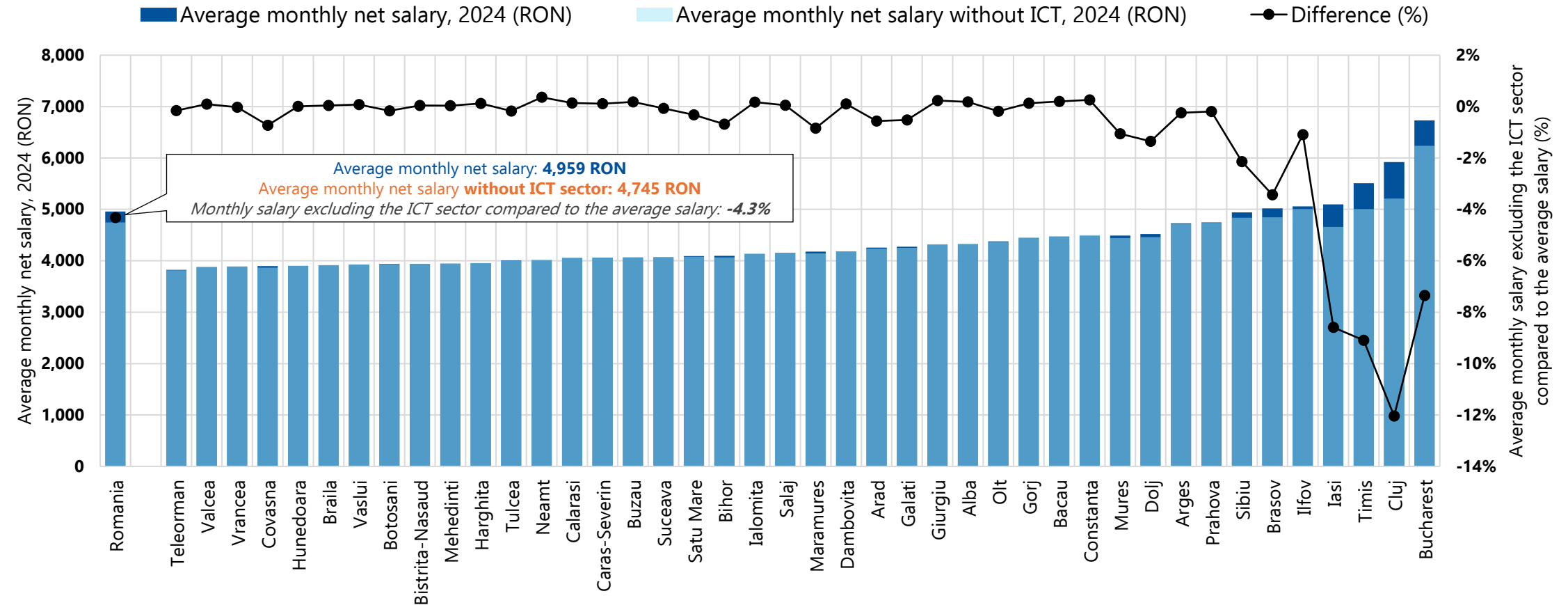
Change compared to previous year (absolute values - YoY)



Average monthly net salaries without ICT sector (RON)

Average monthly net salaries excluding the ICT sector are much lower in some counties. At the national level, if the ICT sector is excluded, salaries would be 4.3% lower.

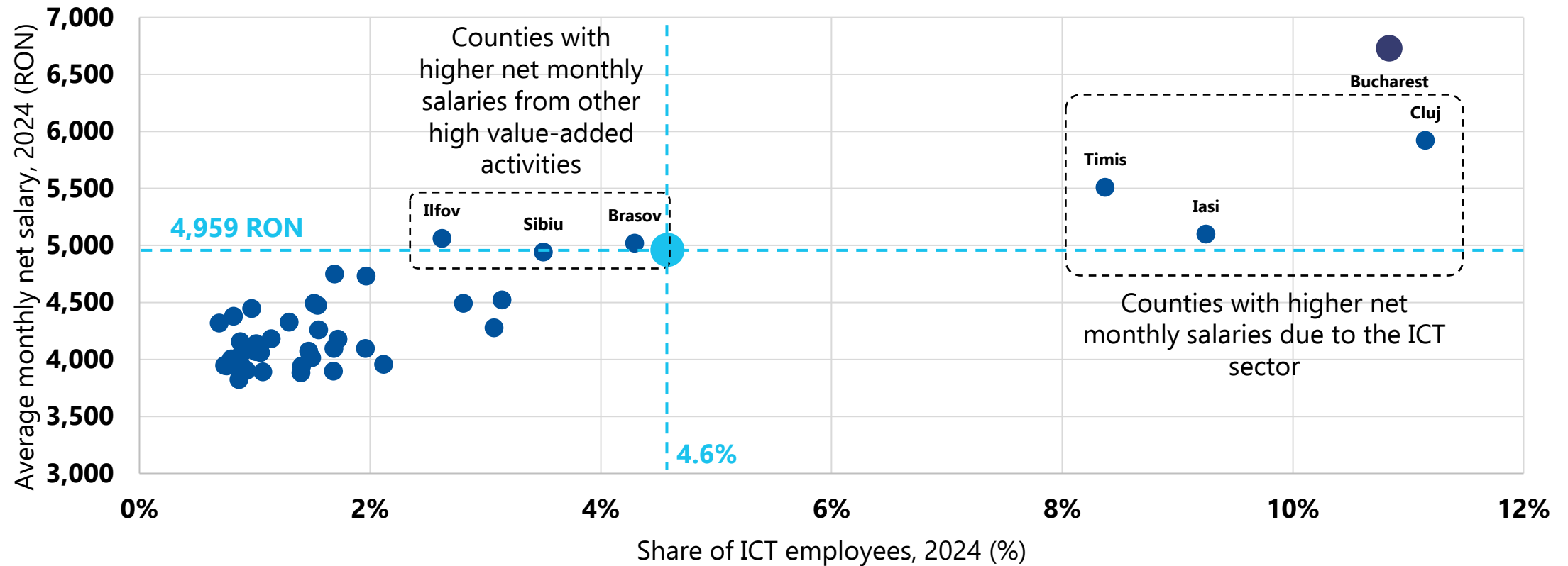
Average monthly net salaries without ICT sector, 2024 (RON and %)



Does a larger ICT sector mean higher monthly salaries?

The dependence on the IT sector is particularly high in three counties and the capital. The higher salaries offered in these regions can be attributed to the larger share of ICT professionals.

Average monthly net salary (RON) and share of ICT employees (%)



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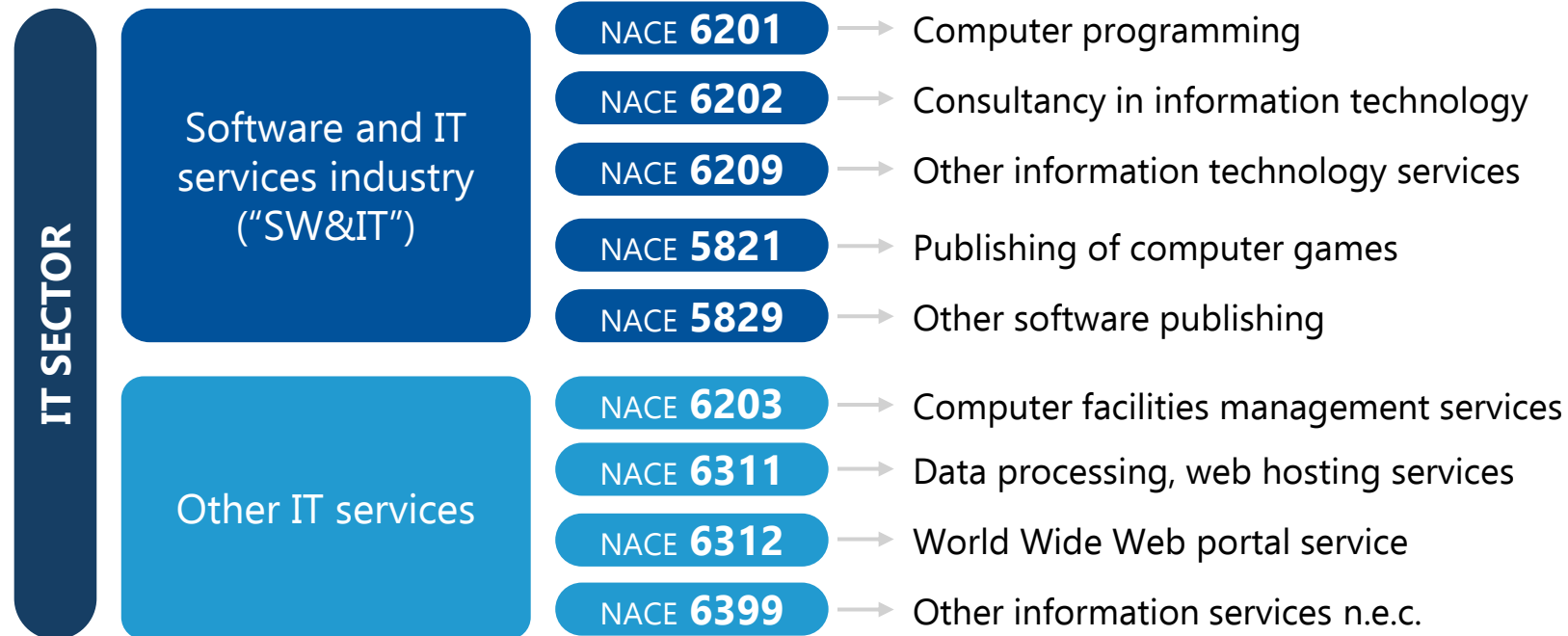
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Research Methodology

A total number of 19,033 Romanian IT companies with a minimum turnover of 50,000 EUR were analyzed with an aggregated turnover of 15.76 billion EUR and aggregated net profit of 2.18 billion EUR.

We have analyzed a total of 9 NACE codes that represent the IT sector of Romania.



Methodological note

The **lower turnover threshold** for the companies partaking in the database was **250,000 RON** (approximately 50,000 EUR).

The **employee number** in this research represents the **total number of full-time employees** (FTE) of the analyzed companies. This comprises **both IT specialists and other personnel involved in the business**.

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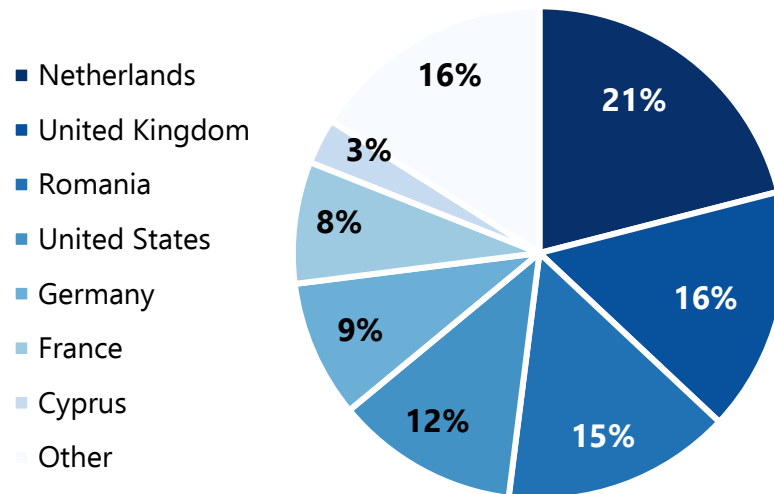
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Shareholder origin of the TOP 100 IT companies in Romania

The Netherlands is the dominating country of origin of the TOP 100 companies' direct shareholding, yet it needs to be noted that the Netherlands often acts as an intermediary hub for non-EU entities.

Country of direct shareholder origin of the TOP 100 companies in the Romanian IT sector, 2024 (%)



Top 10 companies in the Romanian IT sector		Turnover	Net Profit	Employees	Revenue per employee	Debt ratio	Ultimate Shareholder's origin
based on 2024 data		m EUR	m EUR	thousands	k EUR	%	
1.	UIPATH SRL	660	6.2	1.16	571	77%	Romania
2.	CONTINENTAL AUTONOMOUS MOBILITY ROMANIA SRL	429	(33.1)	1.80	238	52%	Germany
3.	BITDEFENDER SRL	337	48.2	1.65	204	35%	Romania
4.	IBM ROMANIA SRL	255	20.7	3.31	77	54%	United States
5.	ENDAVA ROMANIA SRL	255	26.9	3.33	76	24%	United Kingdom
6.	VODAFONE ROMANIA TECHNOLOGIES SRL	212	6.5	3.68	58	92%	United Kingdom
7.	ORACLE ROMANIA SRL	194	1.7	2.09	93	30%	United States
8.	ERICSSON TELECOMMUNICATIONS ROMANIA SRL	182	5.5	1.87	97	48%	Sweden
9.	DB GLOBAL TECHNOLOGY SRL	176	12.5	1.67	105	30%	Germany
10.	AMAZON DEVELOPMENT CENTER SRL	161	(5.9)	3.42	47	14%	United States

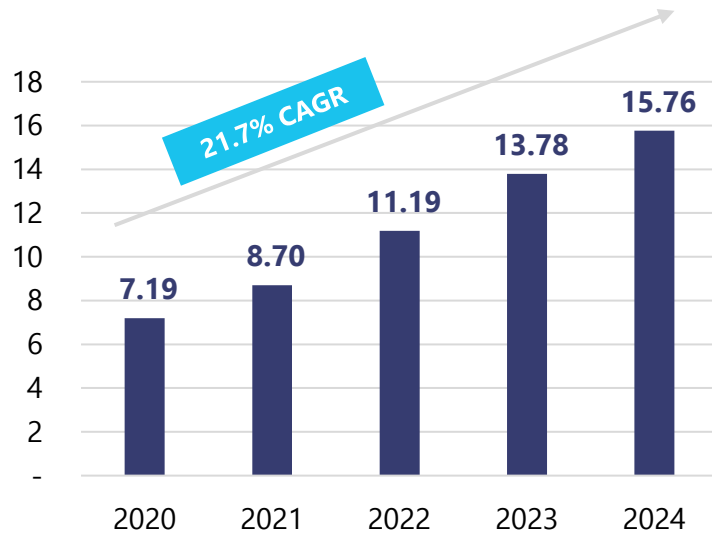
Source: Analysis based on the ListaFirme database

Note: The research includes all 19,033 Romanian IT companies with latest yearly turnover exceeding 50,000 EUR

The evolution of the Romanian IT companies

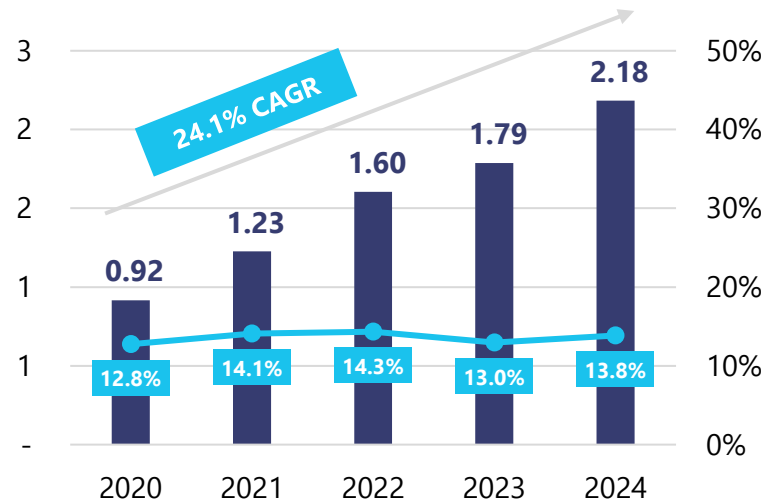
The Romanian IT companies have achieved significant growth in the 5-year period analyzed, more than doubling in size and in net profits. The growth rate in size slowed down in 2024 as the companies reach maturity.

Total turnover of the Romanian IT companies, 2020-2024 (billion EUR)



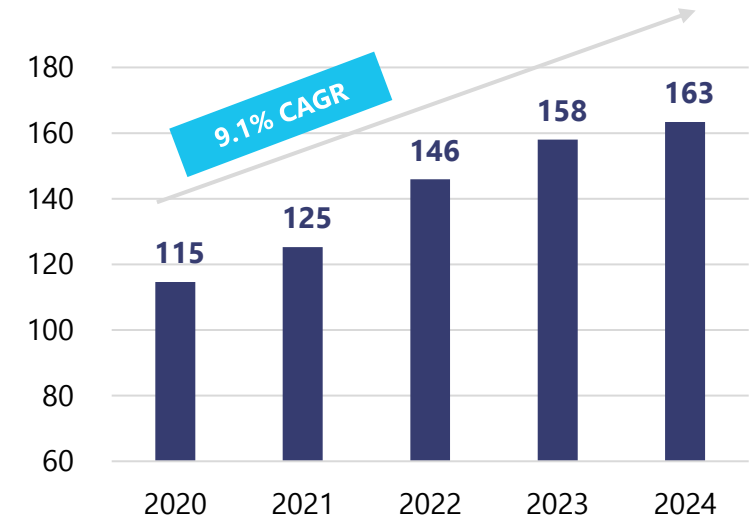
The turnover has registered a stable and steady growth between 2020-2024.

Total net profit and profit margin of the Romanian IT companies, 2020-2024 (billion EUR, %)



The growth rate of the net profits also experienced a slowdown in 2023, but bounced back in 2024.

Total number of employees in the Romanian IT companies, 2020-2024 (thousands)



The growth in the number of employees was below the size growth, IT companies achieving significant optimization in processes.

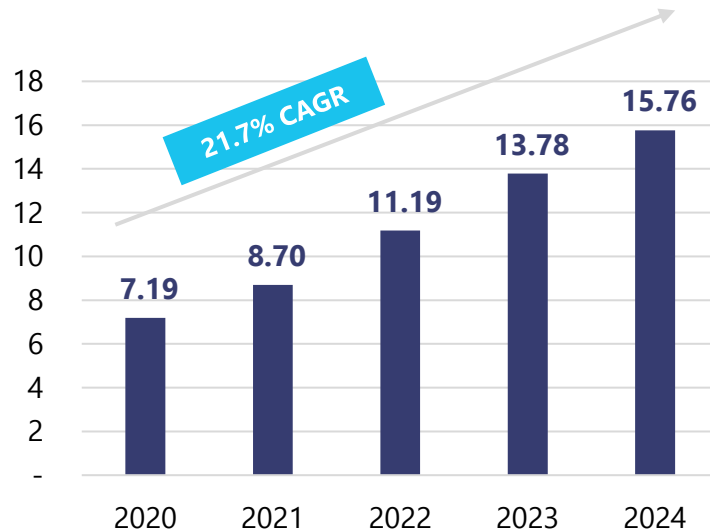
Source: Analysis based on the ListaFirme database

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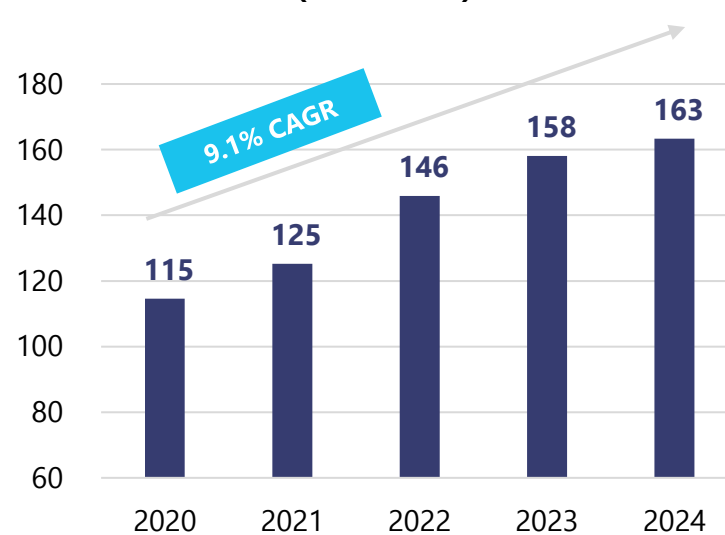
The evolution of the Romanian IT companies

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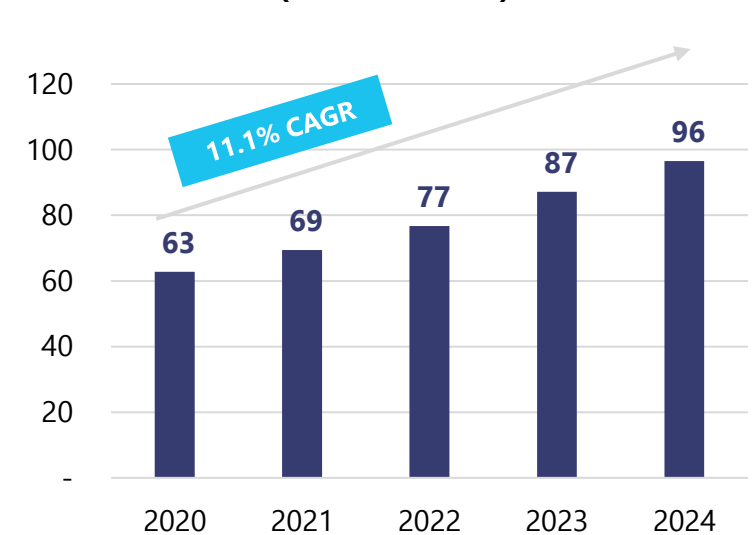
Total turnover of the Romanian IT companies, 2020-2024 (billion EUR)



Total number of employees in the Romanian IT companies, 2020-2024 (thousands)



Turnover per employee in the Romanian IT companies, 2020-2024 (thousand EUR)



The **productivity** of the companies had **improved significantly** during the 5-year period analyzed, **the size growth** (21.7% CAGR) **had double the speed of the growth in personnel** (9.1% CAGR). This means that the **Romanian IT companies successfully achieved greater average efficiency in operations.**

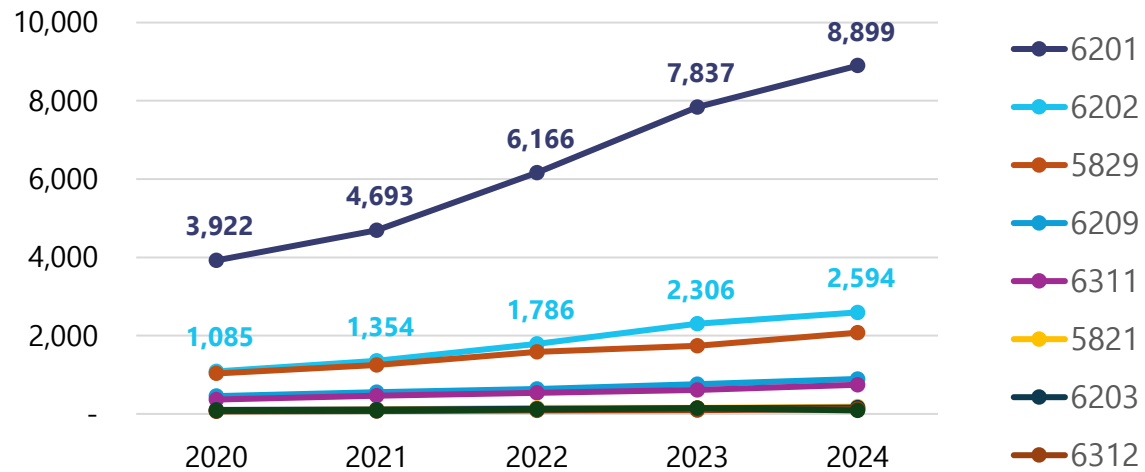
Source: Analysis based on the ListaFirme database

Note: The research includes all 19,033 Romanian IT companies with latest yearly turnover exceeding 50,000 EUR

The evolution of the Romanian IT companies by NACE codes

The Romanian IT companies are primarily dominated by NACE code 6201, which is defined as “computer programming”, the sector prevalently focuses on high value added services and products.

Distribution of the Romanian IT companies' **turnover** by NACE codes, 2020-2024 (million EUR)

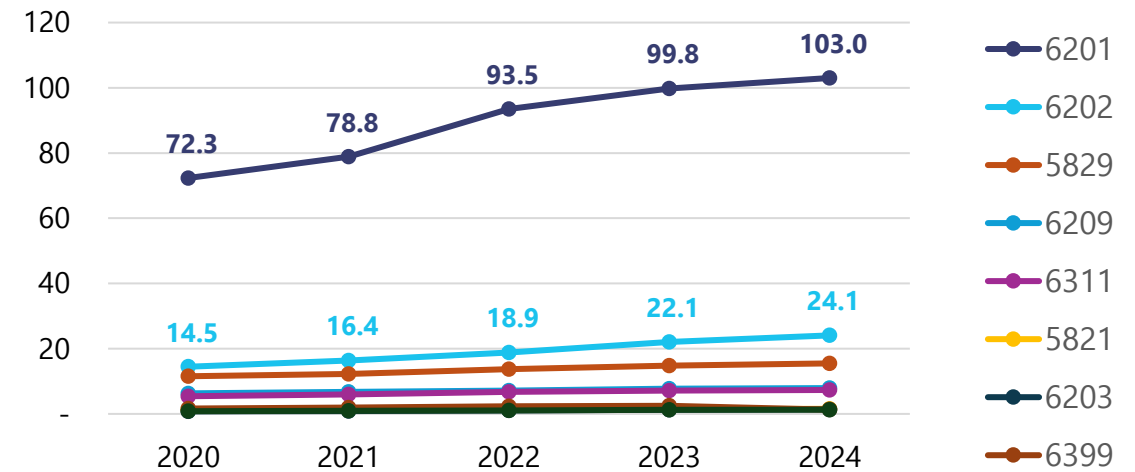


The subsector of NACE 6201 experienced exponential growth during the analyzed 5-year period, achieving a CAGR of 22.7%.

NACE **6201**

→ Computer programming

Distribution of the Romanian IT companies' **number of employees** by NACE codes, 2020-2024 (thousands)



The number of employees in NACE 6201 was steadily growing year over year, achieving a CAGR of 9.3%.

NACE **6202**

→ Consultancy in information technology

Source: Analysis based on the ListaFirme database

Note: The research includes all 19,033 Romanian IT companies with latest yearly turnover exceeding 50,000 EUR

Average turnover per employee in the IT sector by NACE codes

Turnover per employee varied across subsectors, with 5829 (other software publishing) showing steady growth from 89.5 in 2020 to 134.0 in 2024.

Turnover per employee in thousand EUR

NACE	2020	2021	2022	2023	2024
5829	89.5	101.9	115.3	117.6	134.0
5821	70.8	83.3	107.0	100.6	118.9
6203	130.9	135.5	122.3	115.4	117.1
6209	72.0	82.0	88.9	98.1	112.8
6202	75.0	82.6	94.7	104.3	107.8
6311	67.7	76.9	79.8	85.3	101.5
6312	73.7	79.0	78.1	79.2	92.1
6201	54.2	59.5	65.9	78.5	86.4
6399	45.8	43.2	47.8	57.2	70.7

NACE codes in the IT sector

5821 – Publishing of computer games

5829 – Other software publishing

6201 – Computer programming activities

6202 – Computer consultancy activities

6203 – Computer facilities management activities

6209 – Other IT and computer service activities

6311 – Data processing, hosting, and related activities

6312 – Web portals

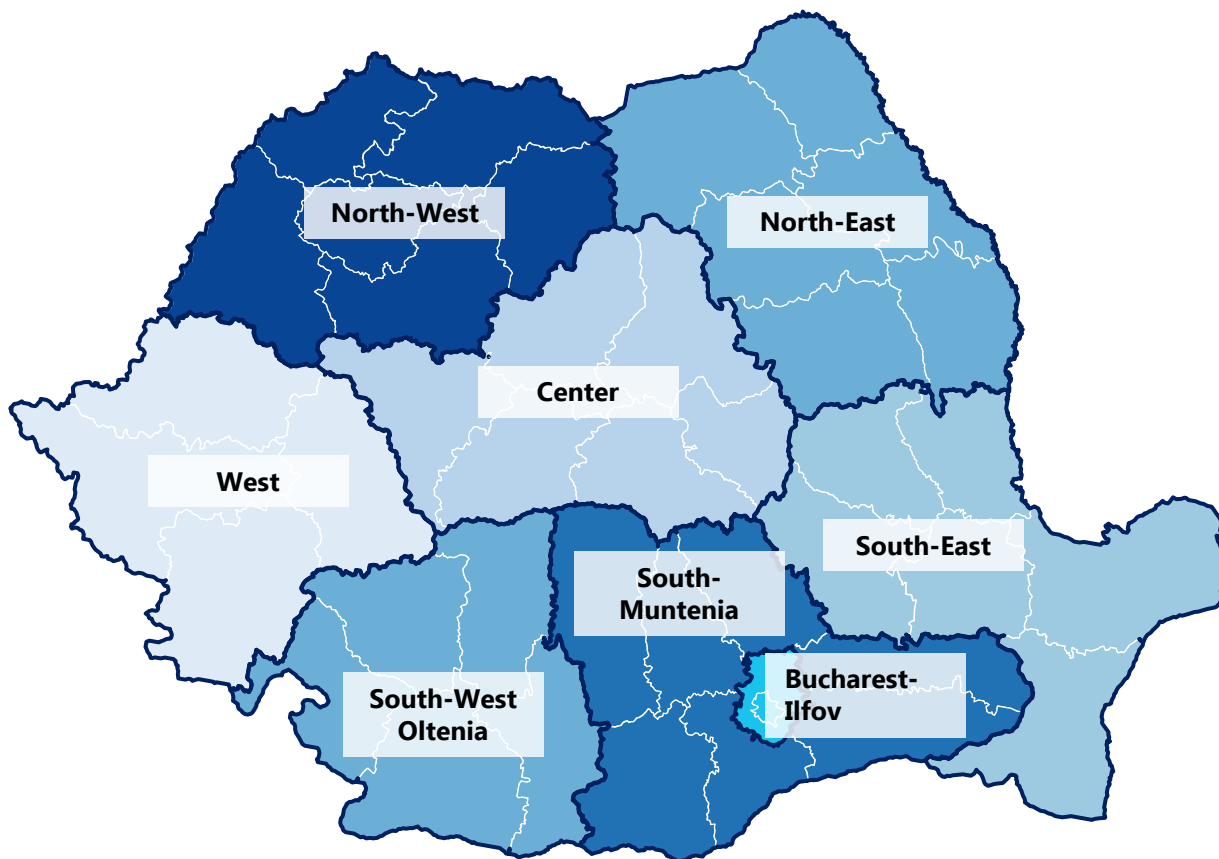
6399 – Other information service activities n.e.c.

Source: Analysis based on the ListaFirme database

Note: The research includes all 19,033 Romanian IT companies with latest yearly turnover exceeding 50,000 EUR

Average turnover per employee by NUTS 2 regions

The North-West, Bucharest-Ilfov and South-Muntenia regions had the highest turnover per employee in 2024, all above 90 thousand euros, whereas the West region having the lowest, 42 thousand euros.



Turnover per employee in thousand EUR

NUTS 2	2020	2021	2022	2023	2024
North-West	168	197	213	176	193
Bucharest-Ilfov	74	82	90	100	111
South-Muntenia	38	51	65	75	93
South-West Oltenia	49	53	67	68	78
North-East	49	55	61	68	78
South-East	47	50	53	62	67
Center	40	46	49	61	66
West	17	17	20	36	42

Source: Analysis based on the ListaFirme database

Note: The research includes all 19,033 Romanian IT companies with latest yearly turnover exceeding 50,000 EUR

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Regional overview of the Romanian IT companies

The Bucharest-Ilfov region stands out as the dominant leader in the Romanian IT sector, the North-West and West regions follow behind. The Bucharest-Ilfov region accounts for 58% of the total Romanian IT companies.



NUTS 2 regions	Turnover	Net Profit	Net Profit Margin	Employees	Revenue per employee	Total Equity	Average Debt ratio
based on 2024 data	m EUR	m EUR	%	thousands	k EUR	m EUR	%
1. Bucharest-Ilfov	9,203	1,066	12%	83.2	110.5	2,833	52%
2. North-West	2,812	437	16%	33.6	83.8	1,058	38%
3. West	1,393	134	10%	14.6	95.6	514	40%
4. North-East	888	186	21%	13.0	68.3	443	28%
5. Center	864	178	21%	11.3	76.3	367	36%
6. South-Muntenia	237	72	31%	2.5	94.0	107	49%
7. South-West Oltenia	199	56	28%	2.6	77.9	90	52%
8. South-East	168	53	32%	2.5	66.1	88	38%
Total / Average	15,764	2,182	14%	163.3	96.5	5,499	46%

Source: Analysis based on the ListaFirme database

Note: The research includes all 19,033 Romanian IT companies with latest yearly turnover exceeding 50,000 EUR

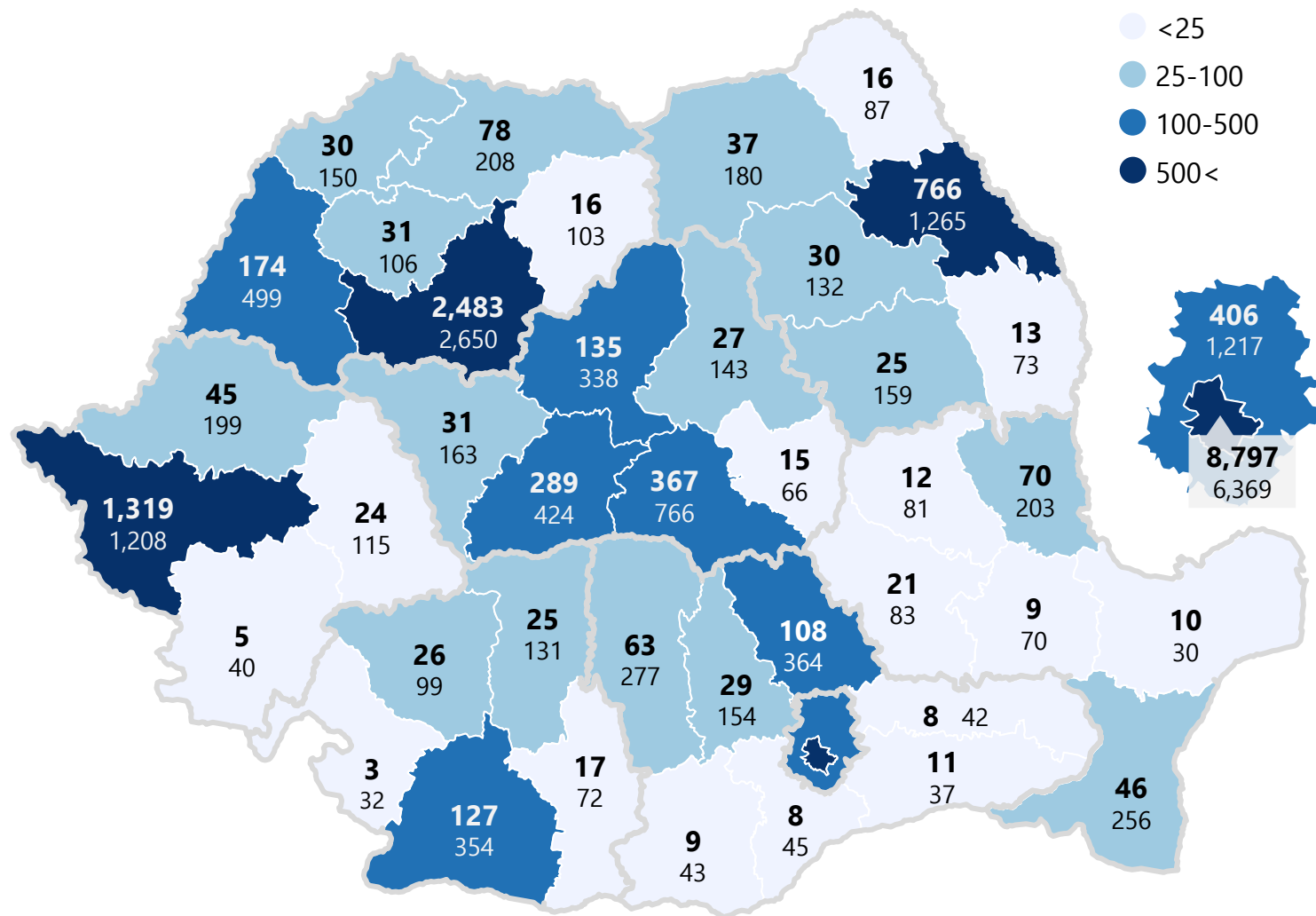
County-level overview of the Romanian IT companies

County-level turnover of IT companies, 2024 (m EUR)

Number of companies in the IT sector, 2024

The county-level overview highlights that the **Bucharest-Ilfov** region stands as the **dominant leader** in the Romanian IT sector.

All **TOP 4 counties** in terms of market size (Bucharest-Ilfov, Cluj, Timis, Iasi) are **prominent university centers** attracting foreign investors, which helped these regions become the most **significant IT hubs** in Romania.



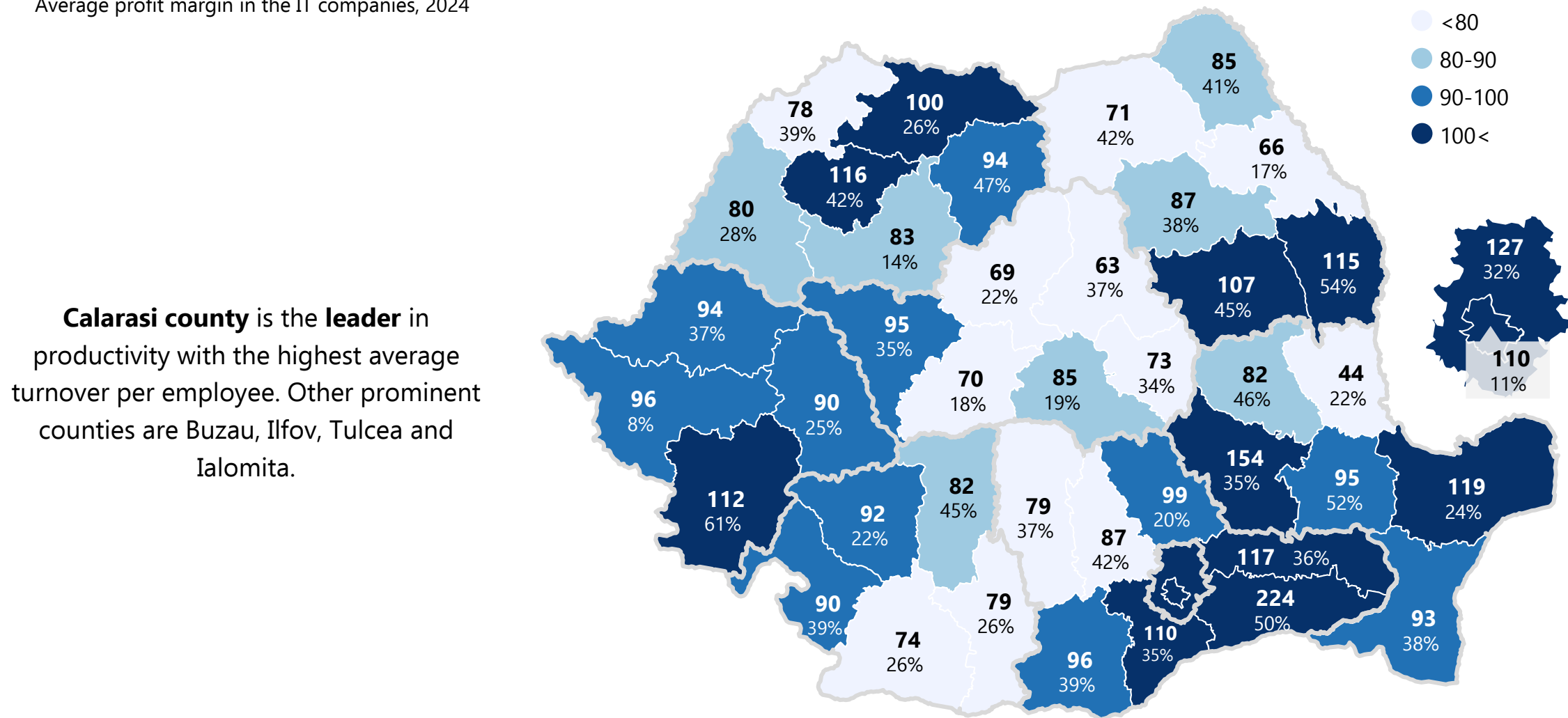
Source: Analysis based on the ListaFirme database

Note: The research includes all 19,033 Romanian IT companies with latest yearly turnover exceeding 50,000 EUR

County-level overview of the Romanian IT companies

Average turnover per employee in the IT companies, 2024 (k EUR)

Average profit margin in the IT companies, 2024

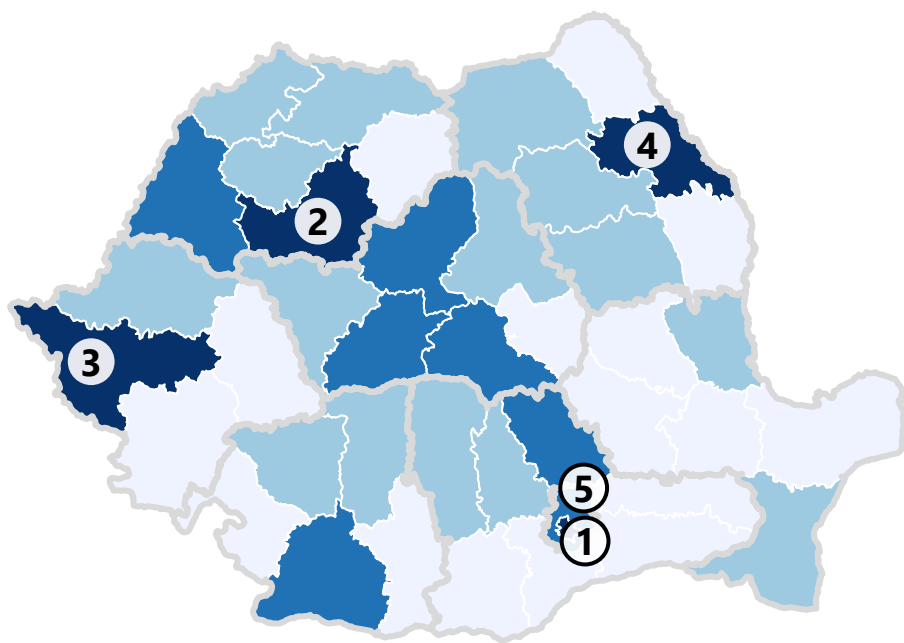


Source: Analysis based on the ListaFirme database

Note: The research includes all 19,033 Romanian IT companies with latest yearly turnover exceeding 50,000 EUR

Analysis of the TOP 5 highest turnover counties in the IT sector

The TOP 5 highest turnover counties account for 87% of the total revenue, 75% of the total net profit, and 85% of the total employees in the Romanian IT companies, highlighting the IT sector's uneven geographic concentration.



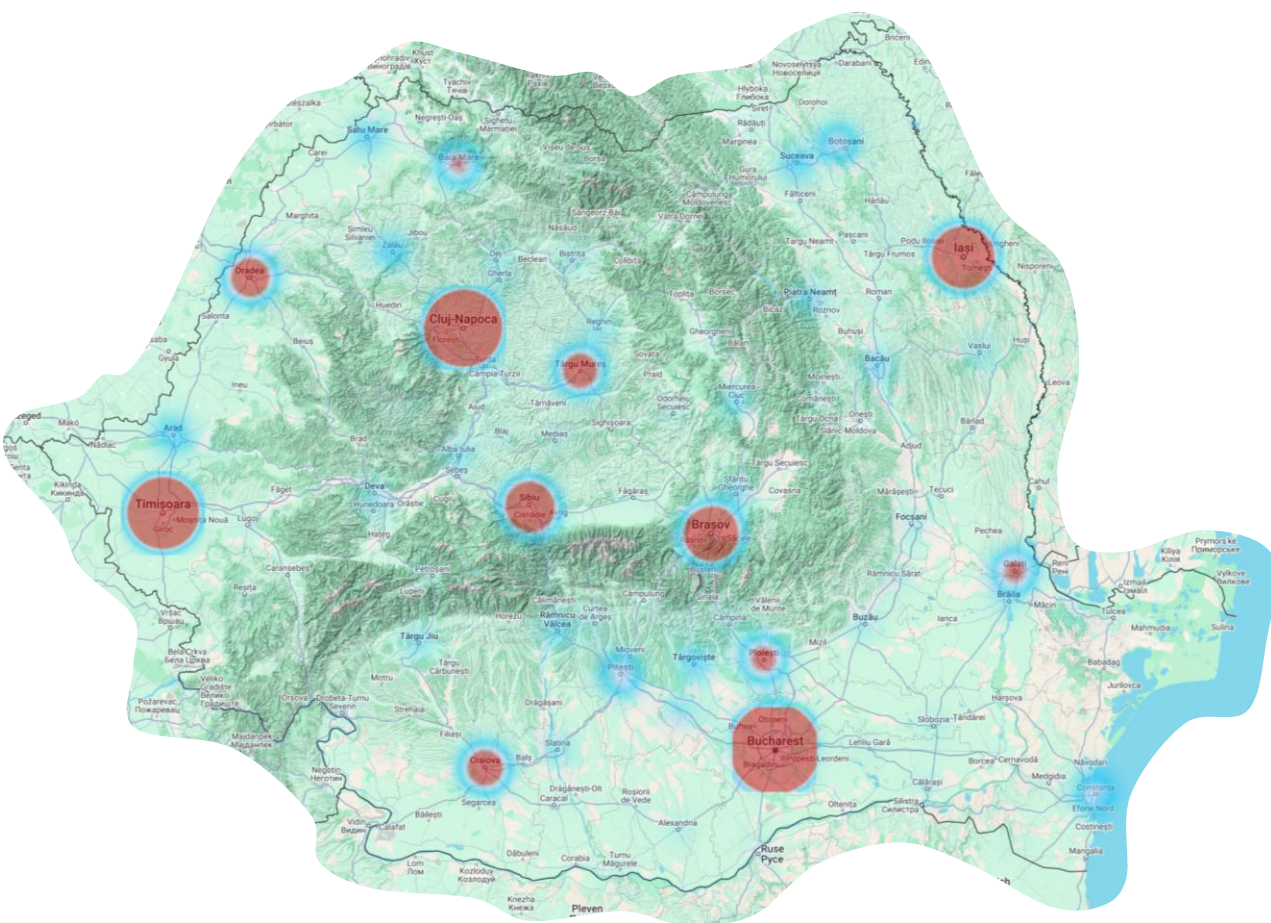
County	Turnover	Net Profit	Profit Margin	Employees	Revenue per employee	Total Equity	Debt ratio
based on 2024 data	m EUR	m EUR	%	thousands	k EUR	m EUR	%
1. Bucharest	8,797	937	11%	80.1	110	2,607	52%
2. Cluj	2,483	335	14%	29.8	83	886	37%
3. Timis	1,319	108	8%	13.8	96	475	40%
4. Iasi	766	134	17%	11.6	66	373	26%
5. Ilfov	406	129	32%	3.2	127	226	50%

Source: Analysis based on the ListaFirme database

Note: The research includes all 19,033 Romanian IT companies with latest yearly turnover exceeding 50,000 EUR

Heat map of the turnover in the Romanian IT companies

The heat map by the city-level turnover shows several important IT hubs dominating the Romanian IT sector, the TOP 5 cities accounting for 85% of its total turnover, employing over 136 thousand people in total.



City	Turnover	Net Profit	Number of companies	Employees	Average year of establishment
based on 2024 data	m EUR	m EUR	pcs	thousands	Year
1. Bucharest	8,797	937	6,369	80.1	2017
2. Cluj-Napoca	2,351	289	2,082	28.6	2018
3. Timișoara	1,236	75	803	13.1	2018
4. Iași	693	95	863	11.0	2018
5. Brașov	331	54	558	3.9	2017
% of the total Romanian IT sector	85%	66%	56%	84%	-

Source: Analysis based on the ListaFirme database

Note: The research includes all 19,033 Romanian IT companies with latest yearly turnover exceeding 50,000 EUR

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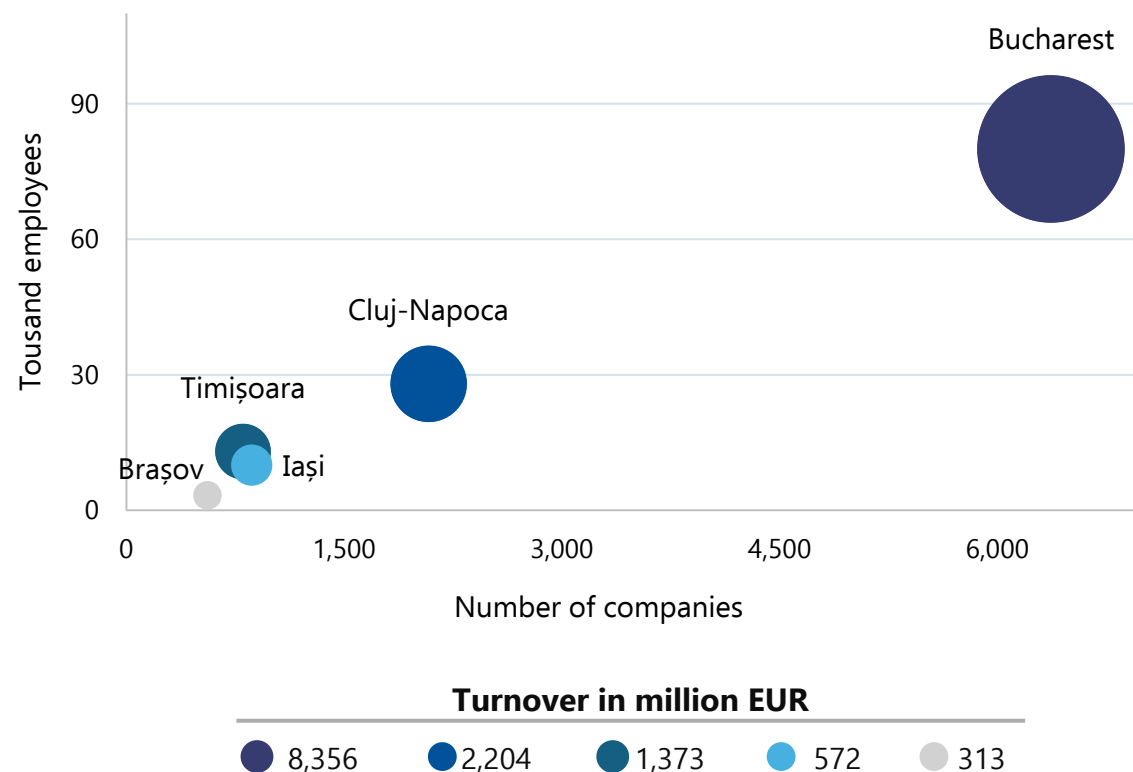
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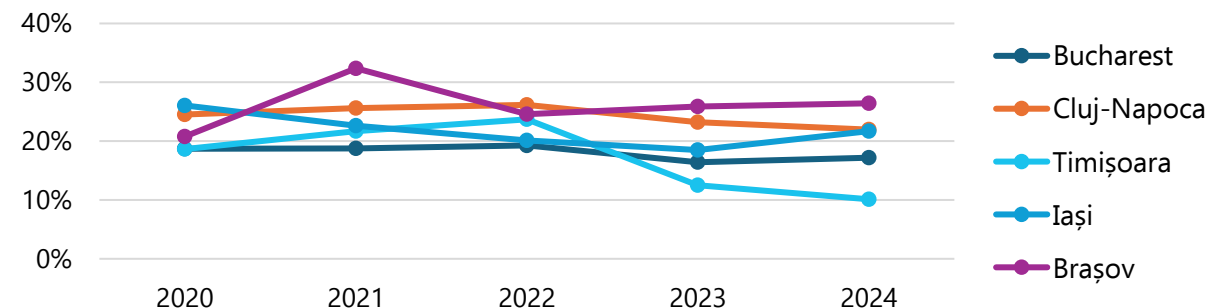
Analysis of the TOP 5 Romanian IT hub cities

Bucharest dominates the Romanian IT sector, accounting for over 60% of turnover and workforce, while Cluj-Napoca and Timișoara emerge as strong regional hubs.

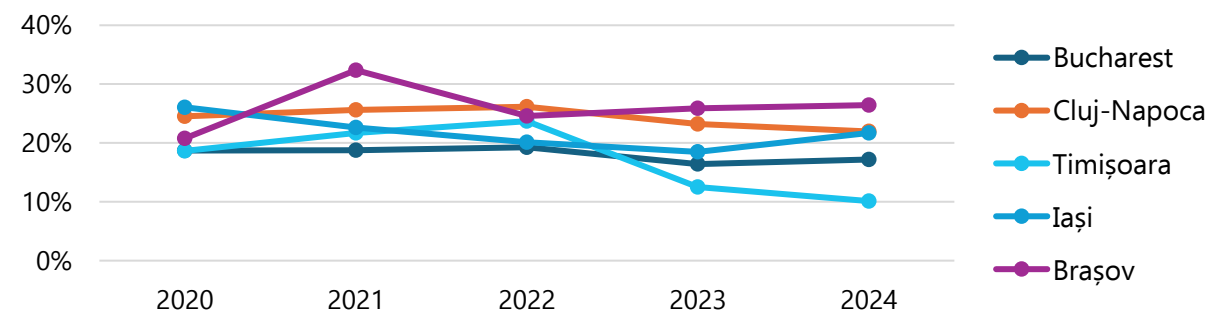
Romania's top 5 IT hubs: companies vs. workforce, 2024 (bubble size = turnover)



ROA of IT companies in the top IT hub cities (2020-2024)



Profit margins of IT companies in the top IT hub cities (2020-2024)



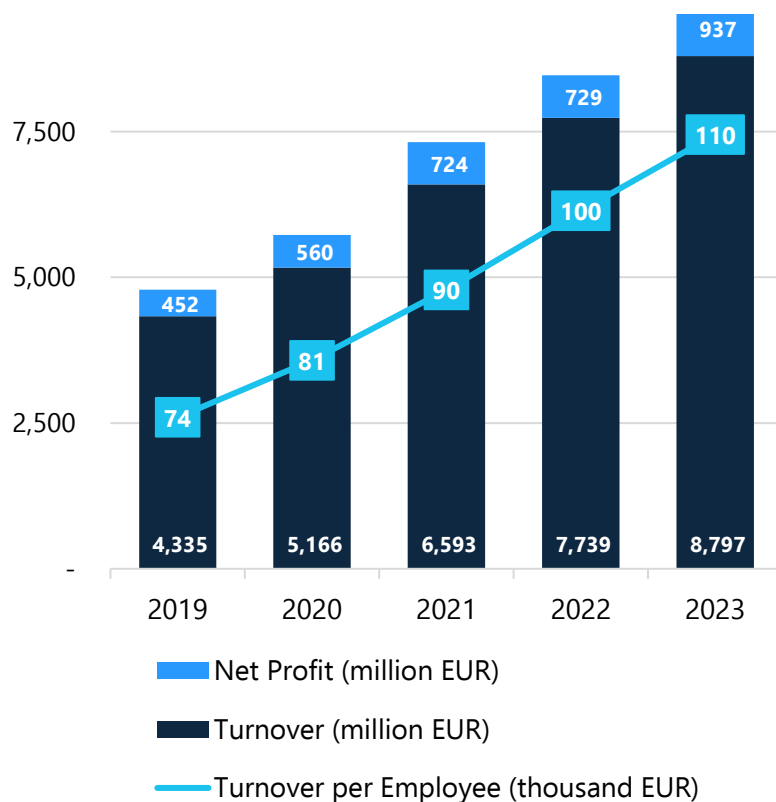
Source: Analysis based on the ListaFirme database

Note: The research includes all 19,033 Romanian IT companies with latest yearly turnover exceeding 50,000 EUR

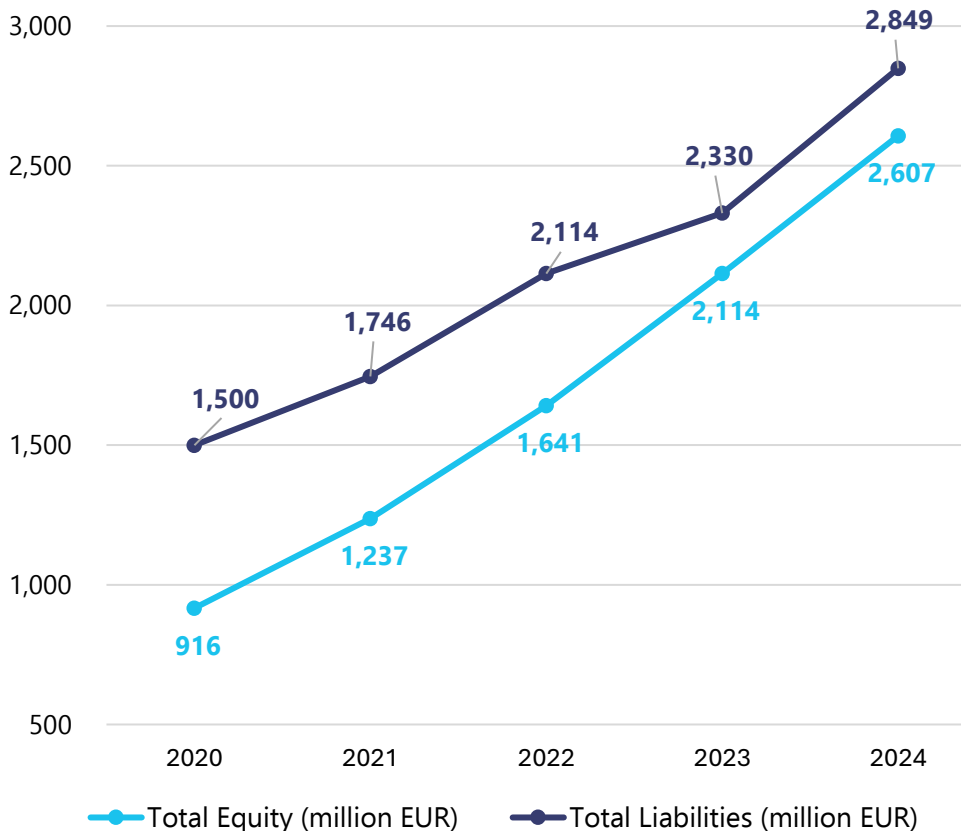
Analysis of the IT hub in Bucharest

Bucharest's IT companies have grown rapidly, with a 19.4% CAGR in turnover (2020-2024), supported by strong profit growth and a stable debt ratio, making it Romania's main IT hub.

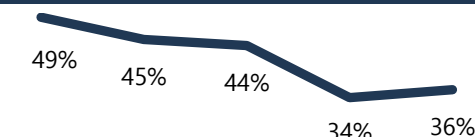
Turnover & net profits in Bucharest's IT companies (2020-2024)



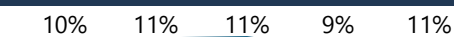
Total equity & liabilities in Bucharest's IT companies (2020-2024)



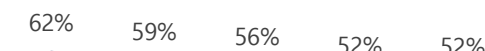
Return on Equity (ROE)



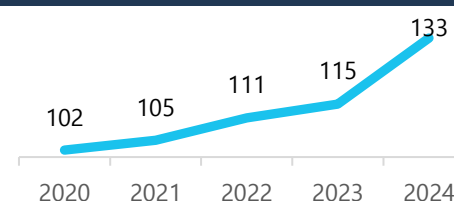
Profit margin



Debt Ratio



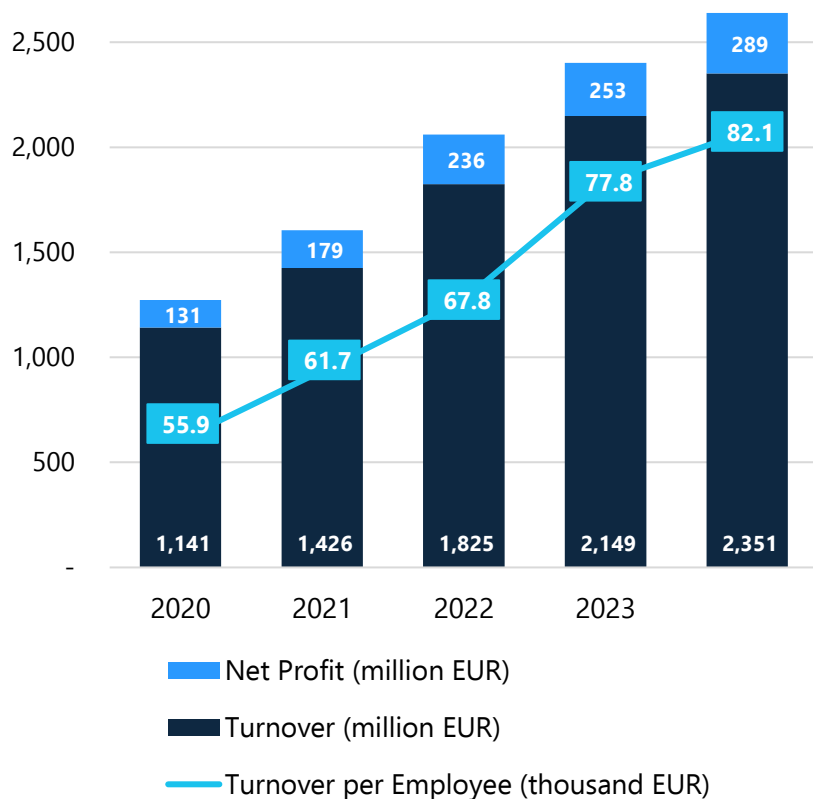
Average DSO



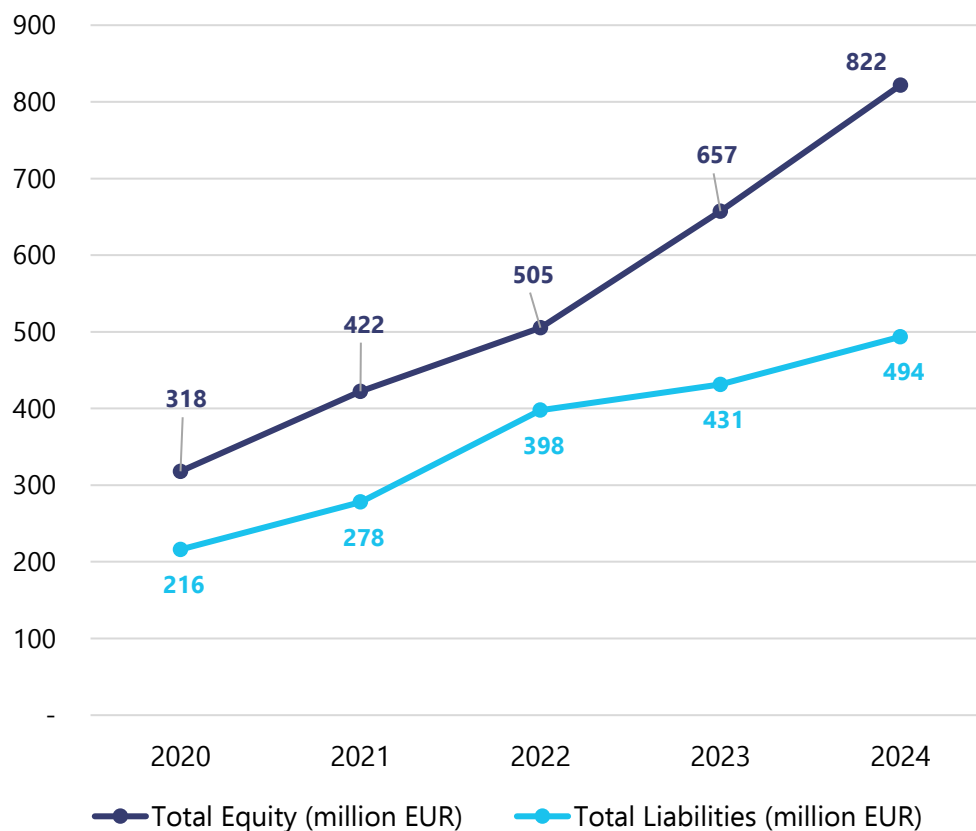
Analysis of the IT hub in Cluj-Napoca

Cluj-Napoca's IT companies have experienced a 19.8% CAGR in turnover (2020-2024), driven by workforce expansion and strong equity growth, while maintaining stable profitability.

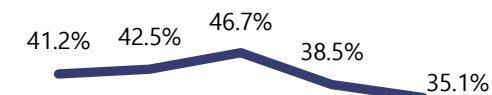
Turnover & net profits in Cluj-Napoca's IT companies (2020-2024)



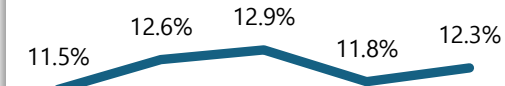
Total equity & liabilities in Cluj-Napoca's IT companies (2020-2024)



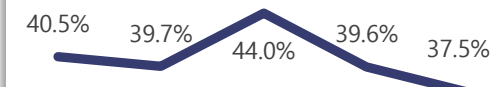
Return on Equity (ROE)



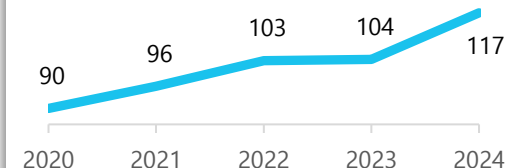
Profit margin



Debt Ratio



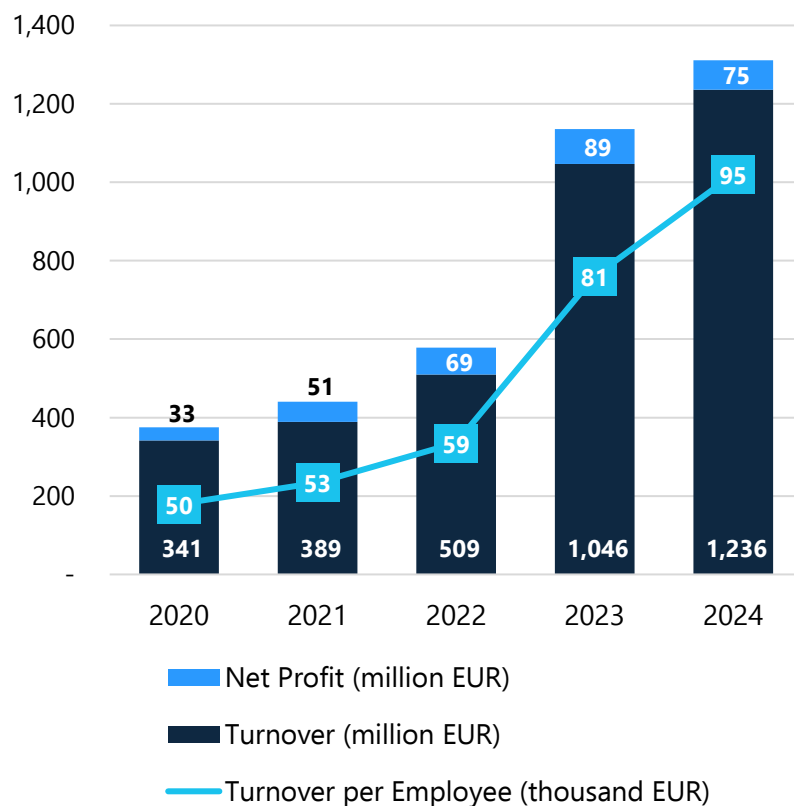
Average DSO



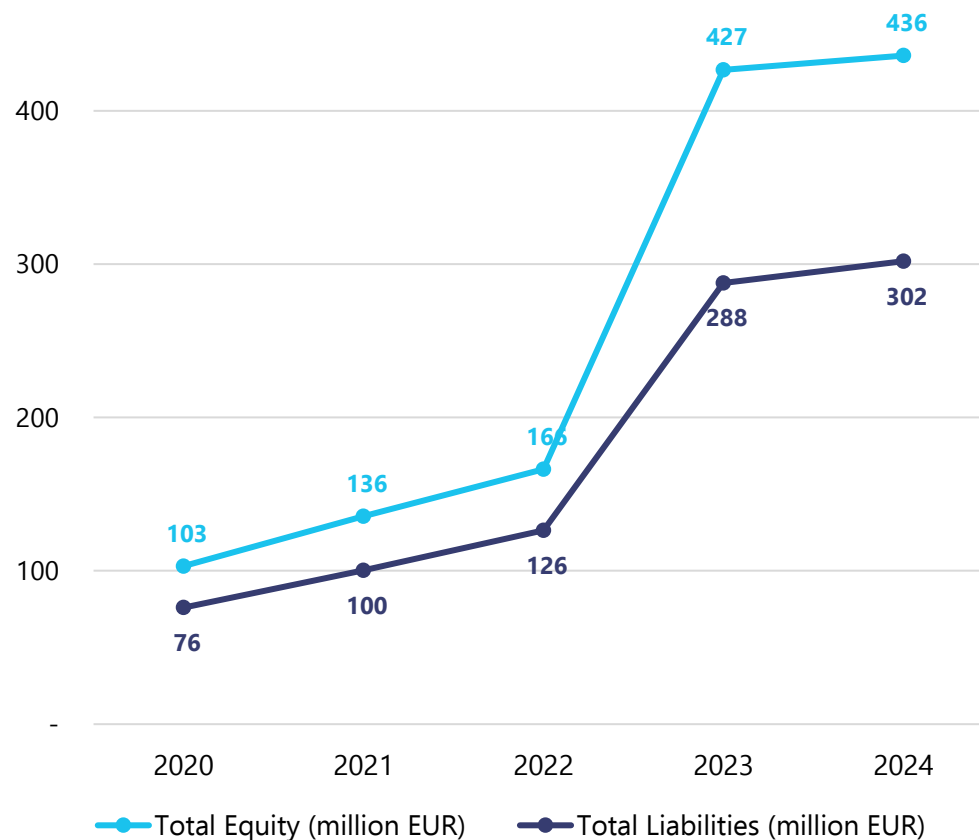
Analysis of the IT hub in Timișoara

Timișoara's IT companies saw the highest turnover growth (38% CAGR) among top cities, with soaring net profits and significant equity expansion between 2020-2024.

Turnover & net profits in Timișoara's IT companies (2020-2024)



Total equity & liabilities in Timișoara's IT companies (2020-2024)



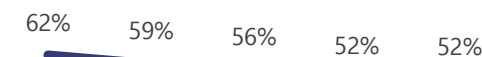
Return on Equity (ROE)



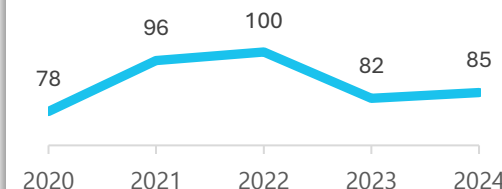
Profit margin



Debt Ratio



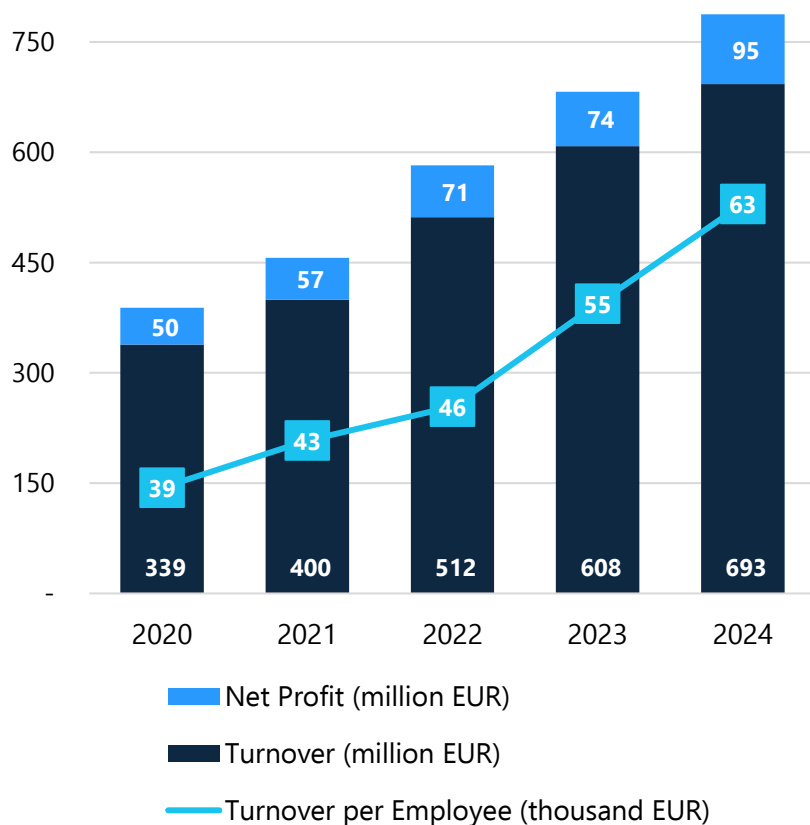
Average DSO



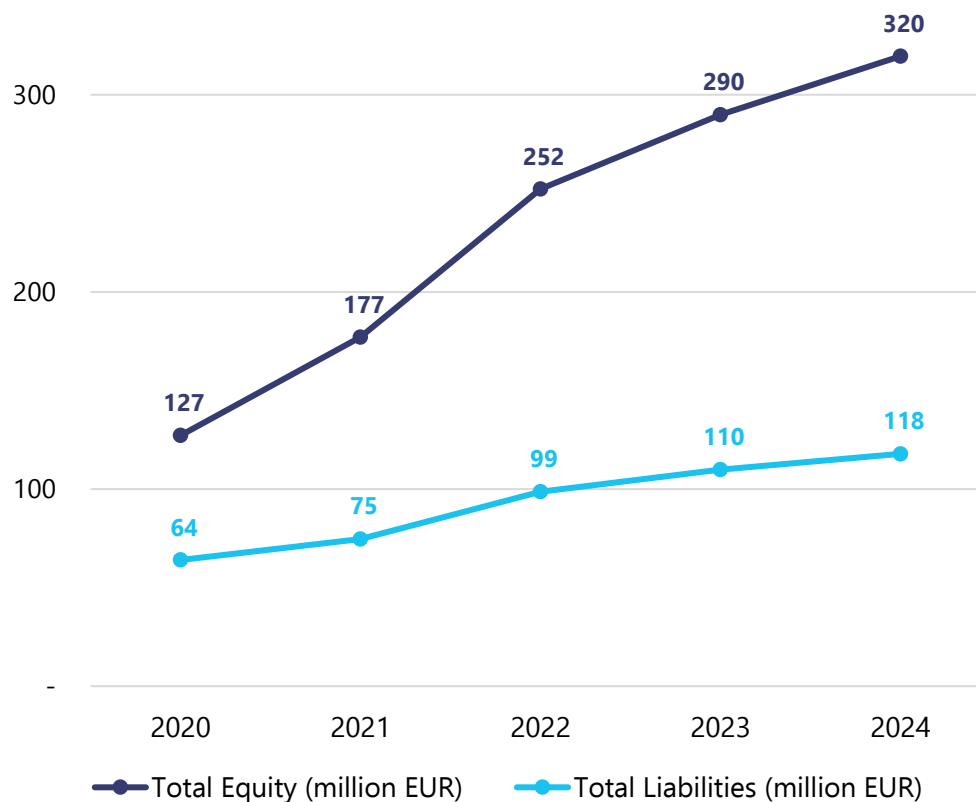
Analysis of the IT hub in Iași

Iași's IT companies have demonstrated steady expansion, with a 19.6% CAGR in turnover and strong equity growth, while maintaining a high profit margin.

Turnover & net profits in Iași's IT companies (2020-2024)



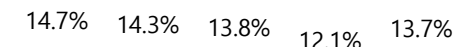
Total equity & liabilities in Iași's IT companies (2020-2024)



Return on Equity (ROE)



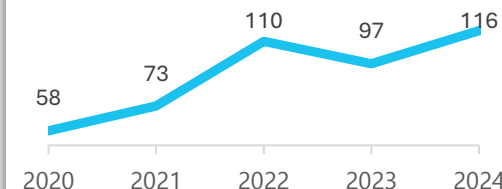
Profit margin



Debt Ratio



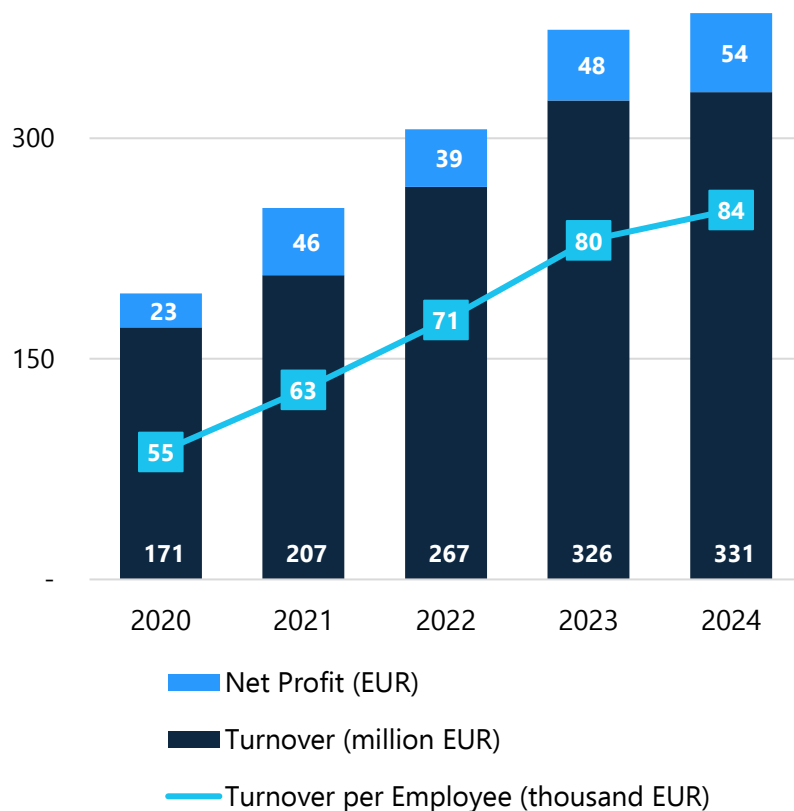
Average DSO



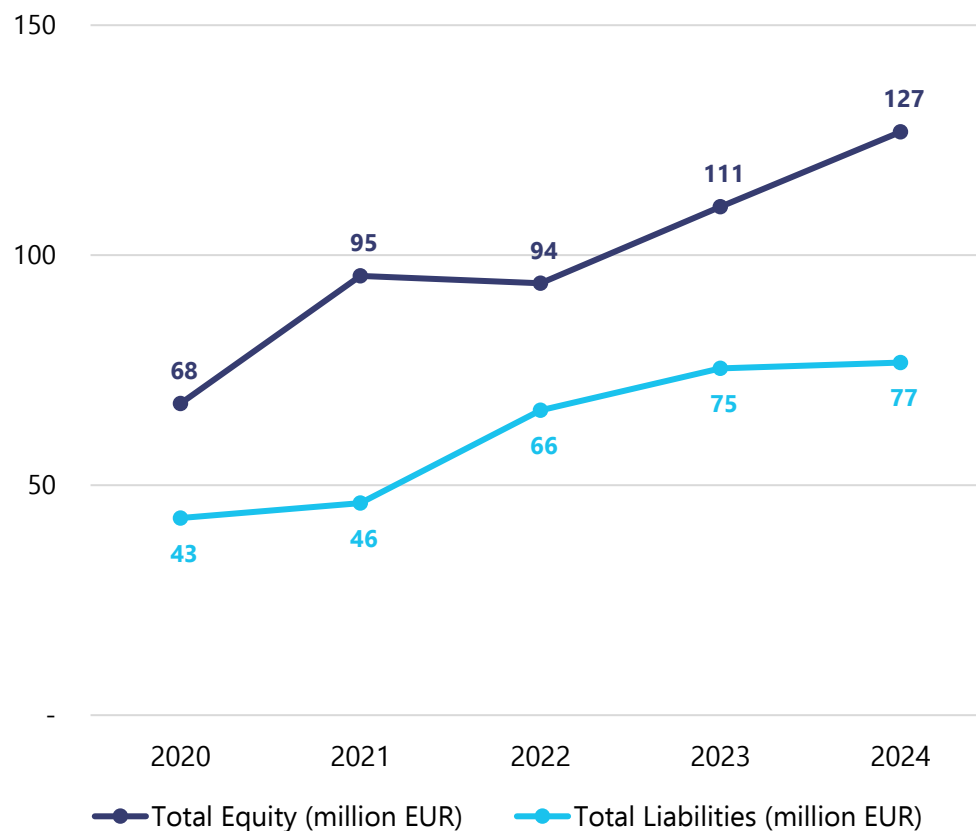
Analysis of the IT hub in Braşov

Braşov's IT companies achieved a 18% CAGR in turnover, supported by high profitability and consistent growth in total equity, despite a volatile debt ratio.

Turnover & net profits in Braşov's IT companies (2020-2024)



Total equity & liabilities in Braşov's IT companies (2020-2024)



Return on Equity (ROE)

34% 48% 42% 44% 42%

Profit margin

13% 22% 15% 15% 16%

Debt Ratio

39% 33% 41% 41% 38%

Average DSO

85 103 101 99 111

2020 2021 2022 2023 2024

Executive summary

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Global IT industry | Romania's IT competitiveness | Romanian ICT industry analysis

IT companies in Romania

Performance of IT companies | Regional distribution | Major IT hubs

Analysis of operations in IT companies in Romania

Survey | Interviews

Policy recommendations

Survey research

The survey research was conducted in 2025 among 122 IT companies and included a set of questions on eight relevant contemporary topics, with the aim of gaining a structured understanding of the IT sector.

122

RESPONDENTS



8

MAIN
QUESTIONNAIRE
TOPICS



1) Company demographics

2) Type of activity

3) Employees

4) Market internationalization

5) AI use

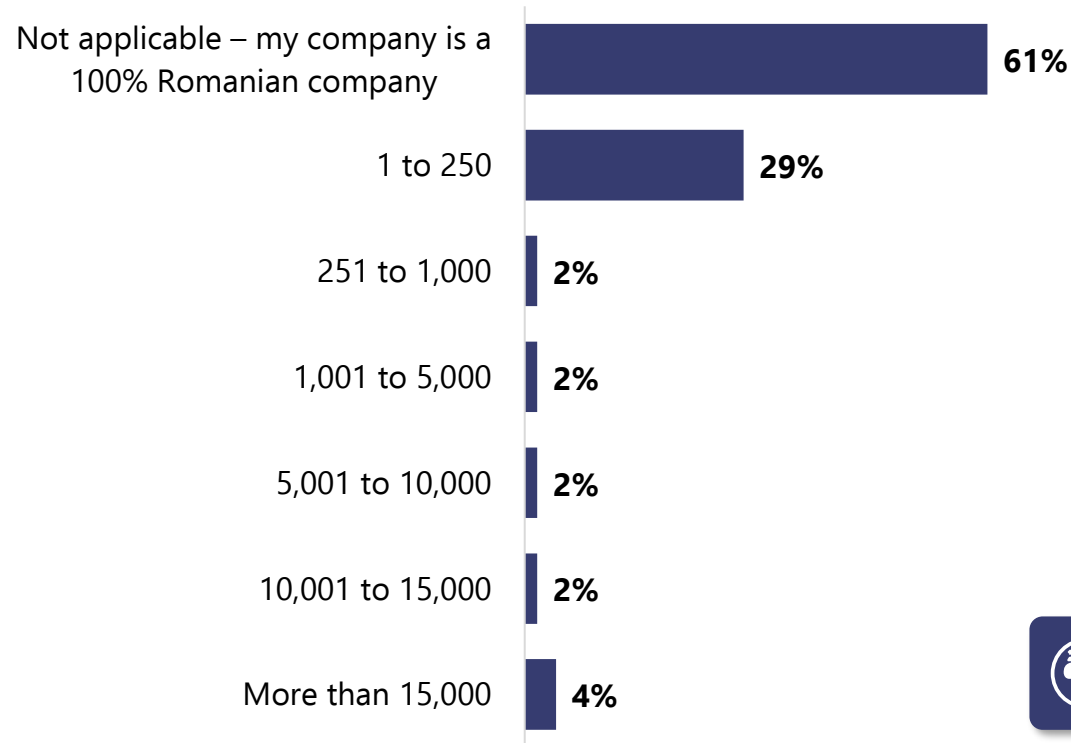
6) Women's career

7) Green IT

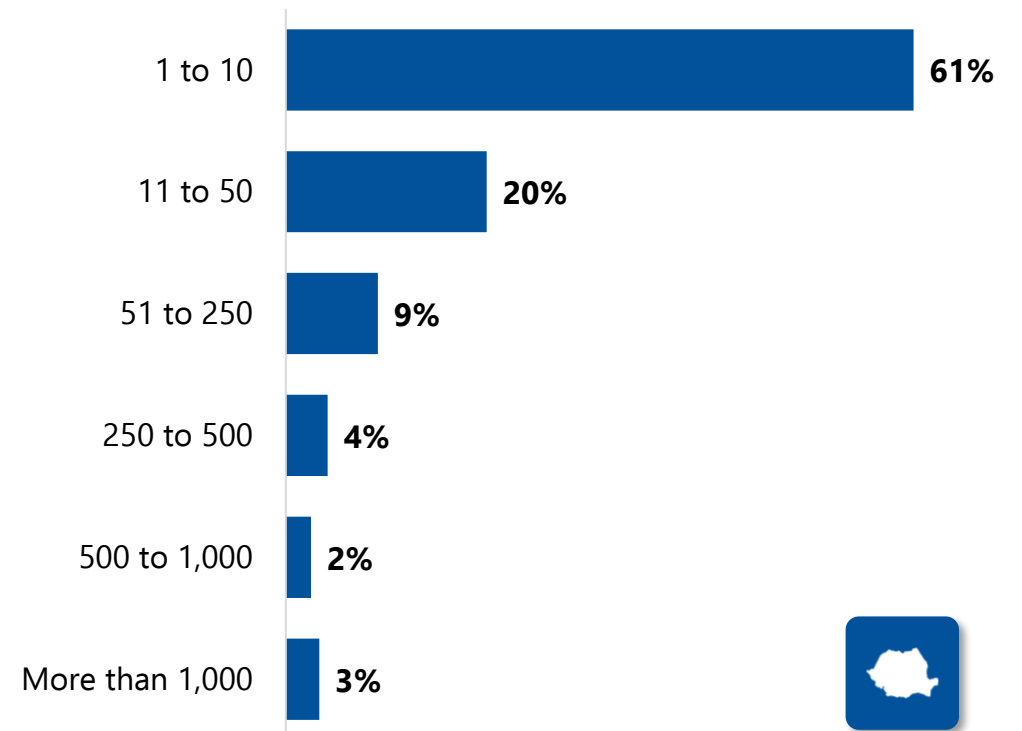
Company demographics (1)

The demographic data indicates that the sample is mostly composed of fully Romanian-owned companies, most of which operate with micro-sized teams of only 1-10 employees.

Total global workforce size (%)



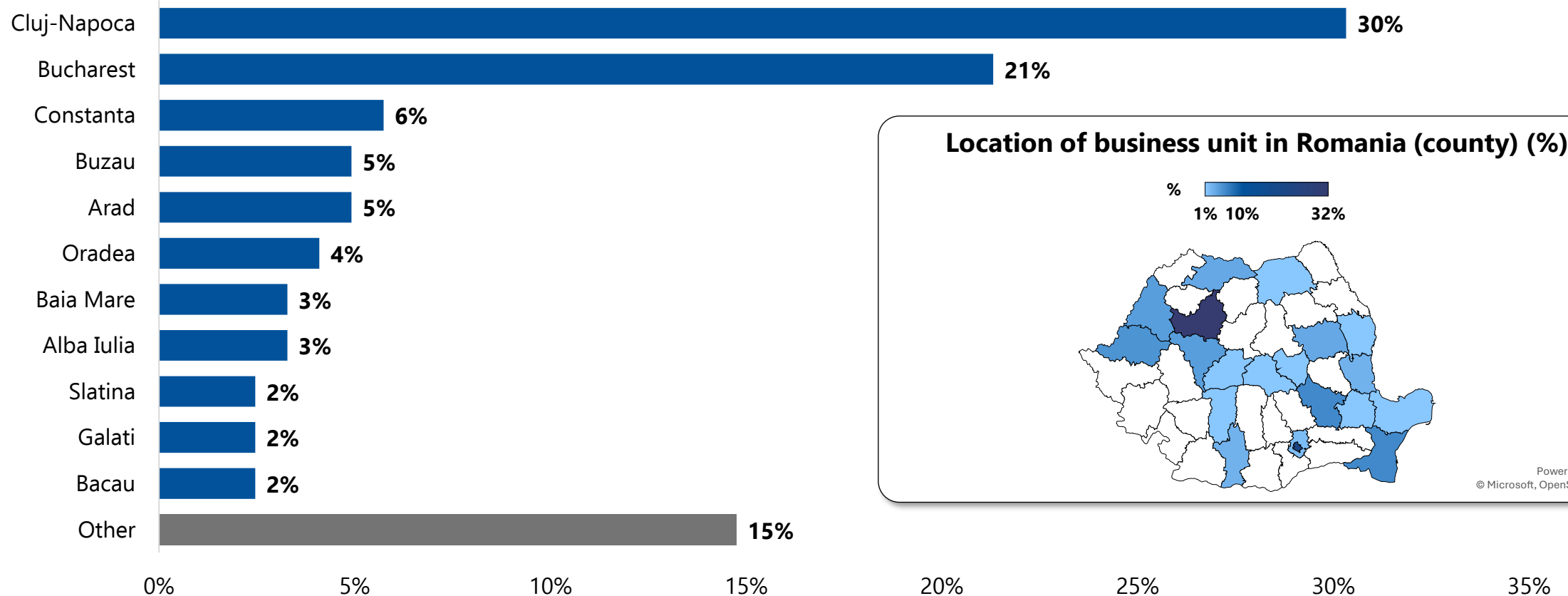
Total workforce size in Romania (including contractual collaborators) (%)



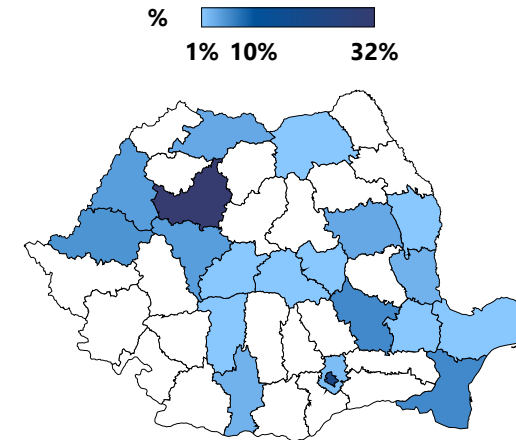
Company demographics (2)

Survey data includes business units of IT companies primarily concentrated in Cluj-Napoca and Bucharest, with smaller representations across a wide range of other Romanian cities.

Location of business unit in Romania (city) (%)



Location of business unit in Romania (county) (%)

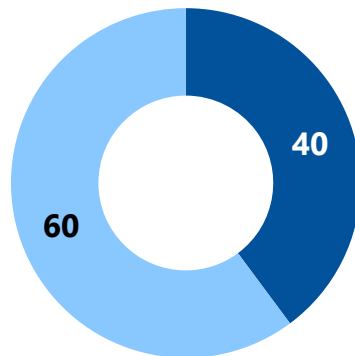


Type of activity

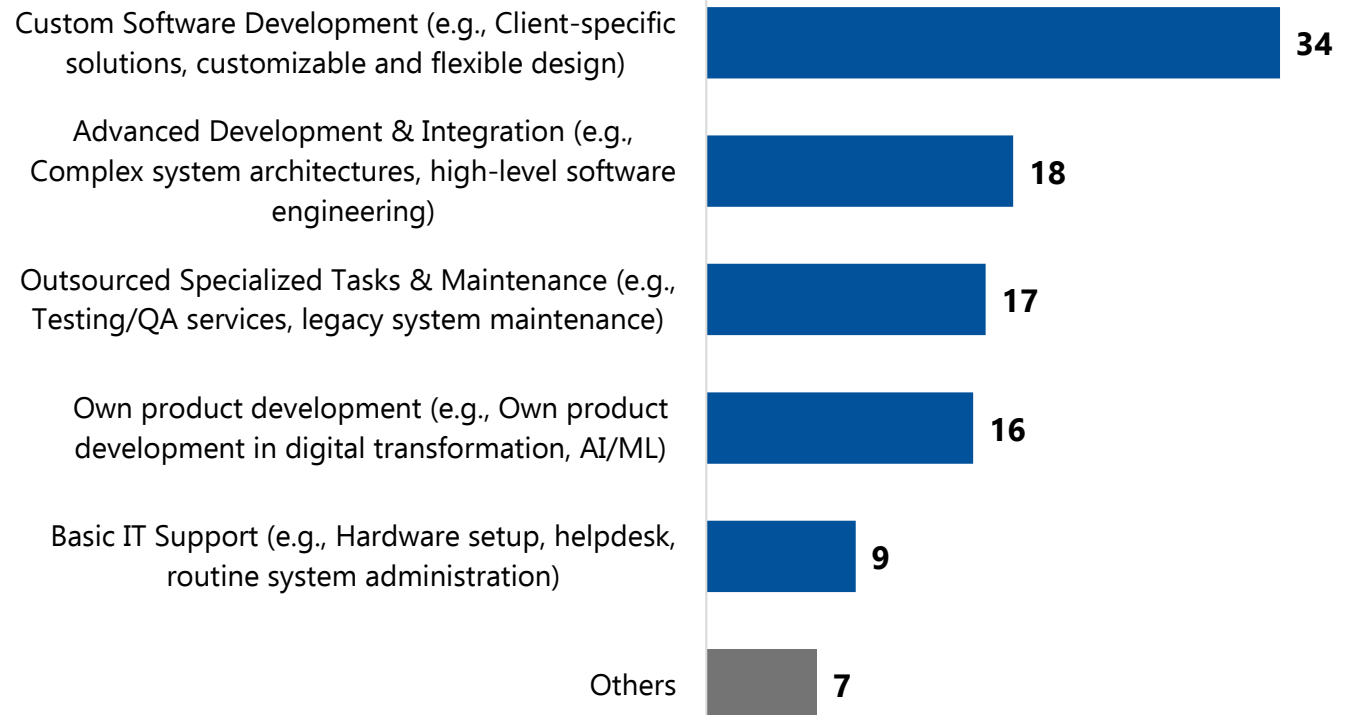
Most of the annual revenue comes from outsourcing and service-based activities, with custom software development representing the largest share among IT project types.

Share of annual revenue by activity type (0-100%)

- **Research & Product Development:** we develop our own products; our company owns the Intellectual Property on the products and solutions we build
- **Outsourcing & Services:** we offer IT services according to our customers' specifications, the Intellectual Property is transferred and belongs to our customers



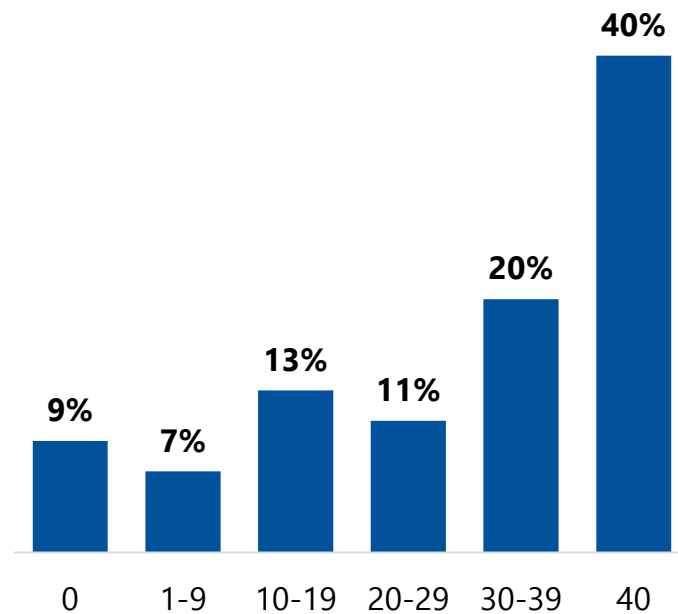
Share of annual revenue by IT project type (0-100%)



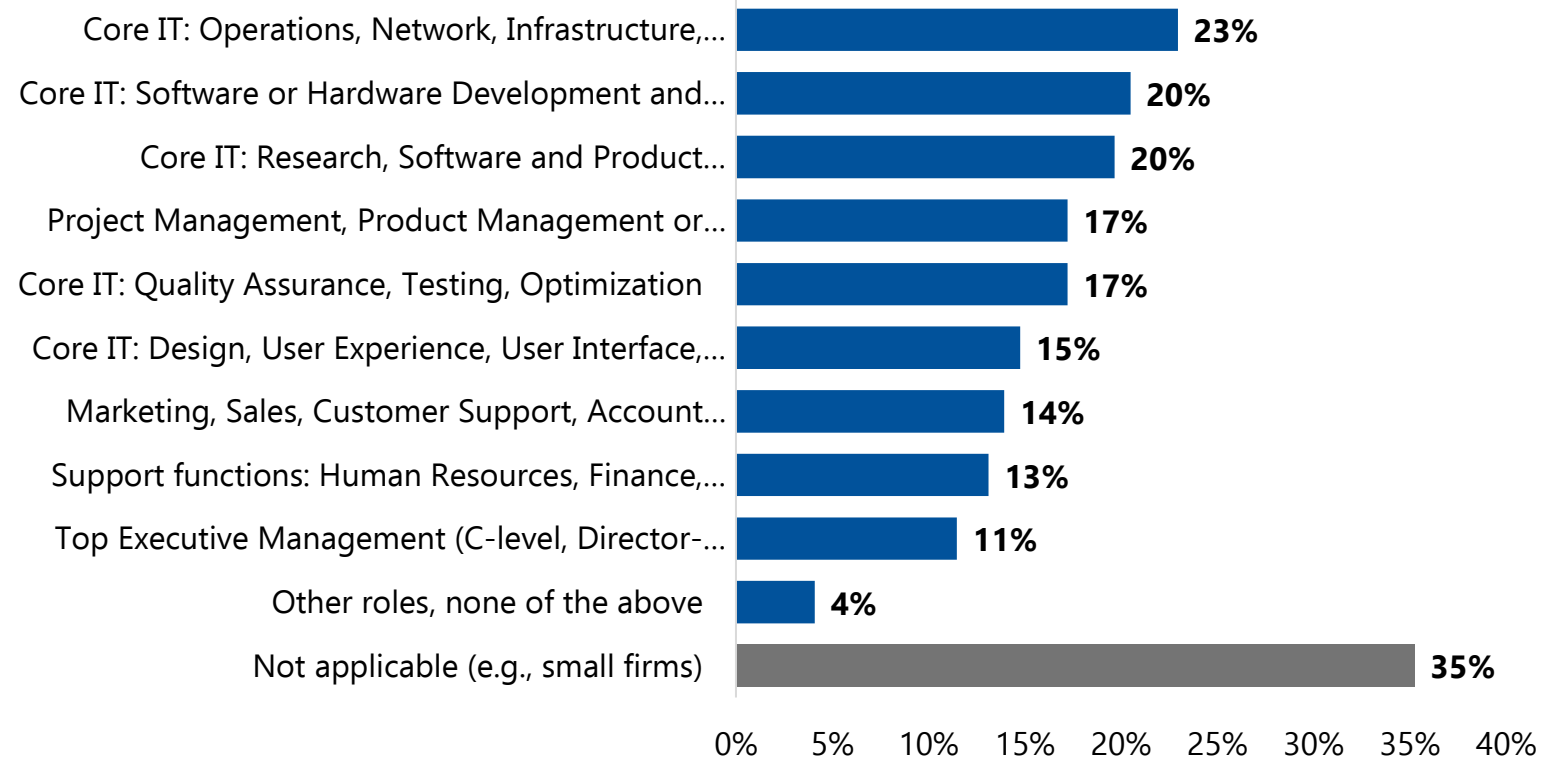
Remote work

Remote work remains substantial across IT companies, the highest level of remote activity concentrated in core IT functions, such as operations, development and infrastructure.

Work hours carried out remotely (from home office) on average per employee on a typical 40-hour working week



Departments that work the most remotely (%)

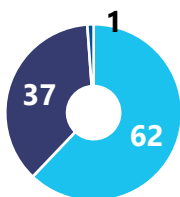


Diversity of the workforce (1)

As for the employees, they are predominantly Romanian citizens, mostly male, largely in the 25-34 age group. They are highly educated, the majority holding university degrees in computer sciences.

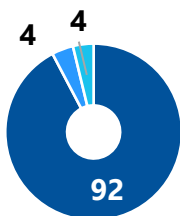
Composition of employees in terms of gender (0-100%)

■ Male ■ Female ■ Do not want to declare

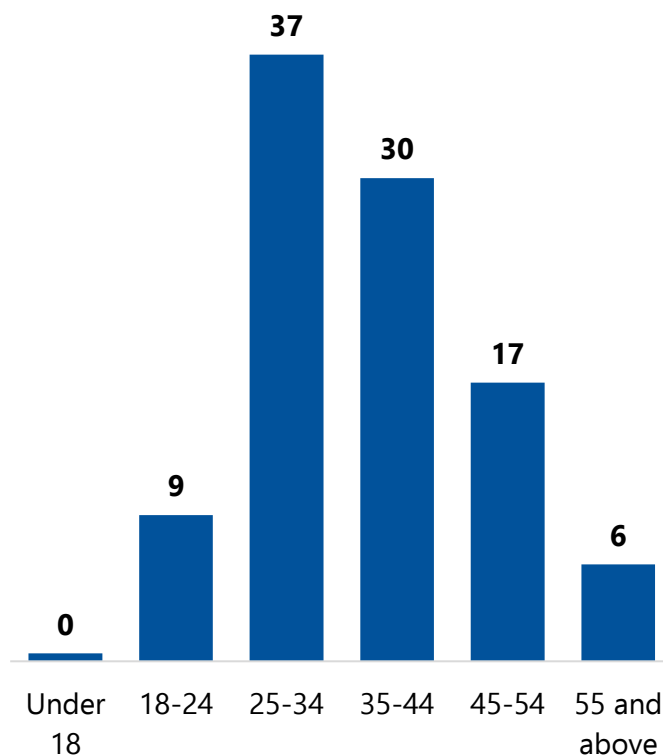


Composition of employees in terms of citizenship (0-100%)

■ Romanian ■ Other EU citizen ■ Outside EU



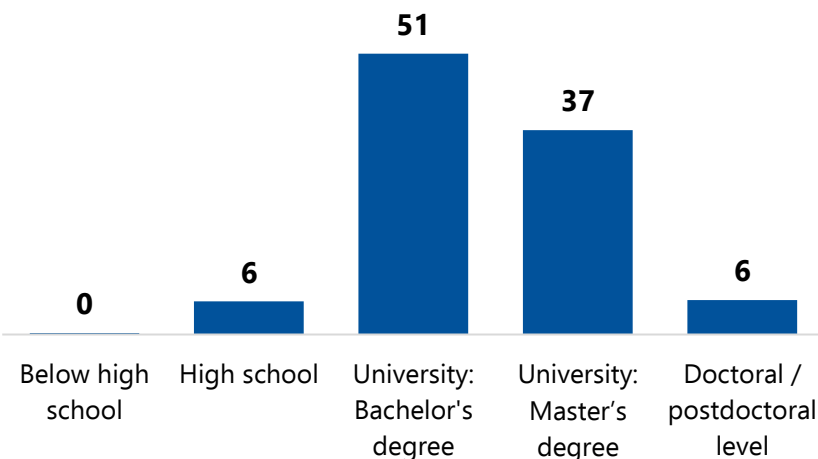
Composition of employees in terms of age (0-100%)



Composition of employees with university degrees (0-100%)



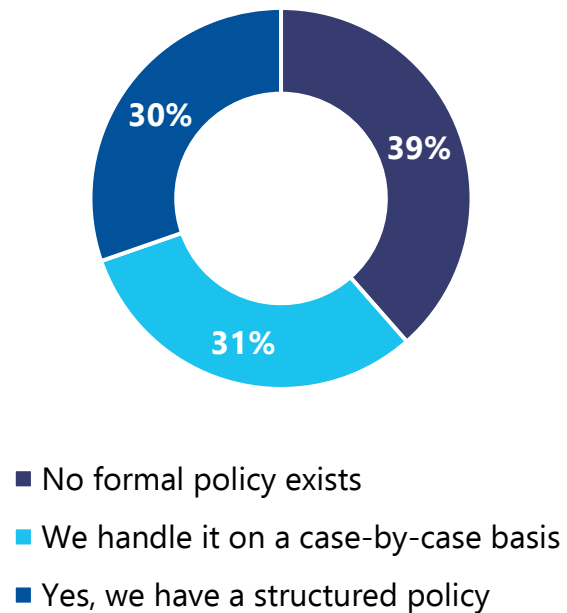
Composition of employees in terms of their highest education level (0-100%)



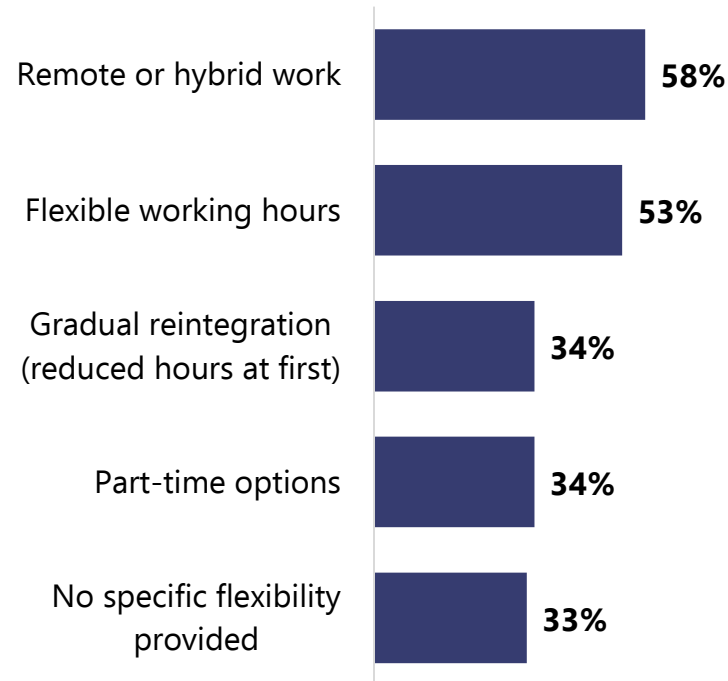
Diversity of the workforce (2)

Women's careers in the IT industry hold significant importance, as 61% of companies provide some form of support during and after maternity leave.

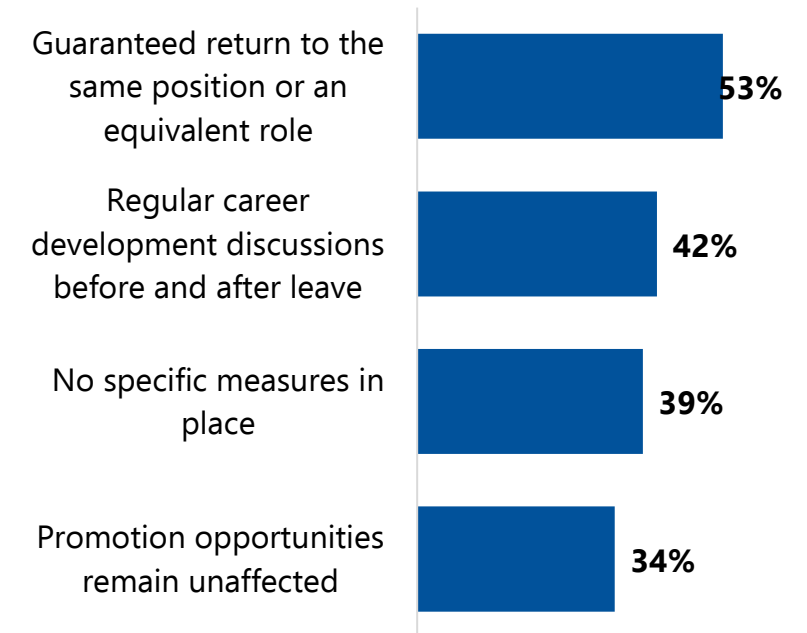
Share of having a formal policy for reintegrating employees after maternity leave (%)



Flexibility offered to employees returning from maternity leave (%)



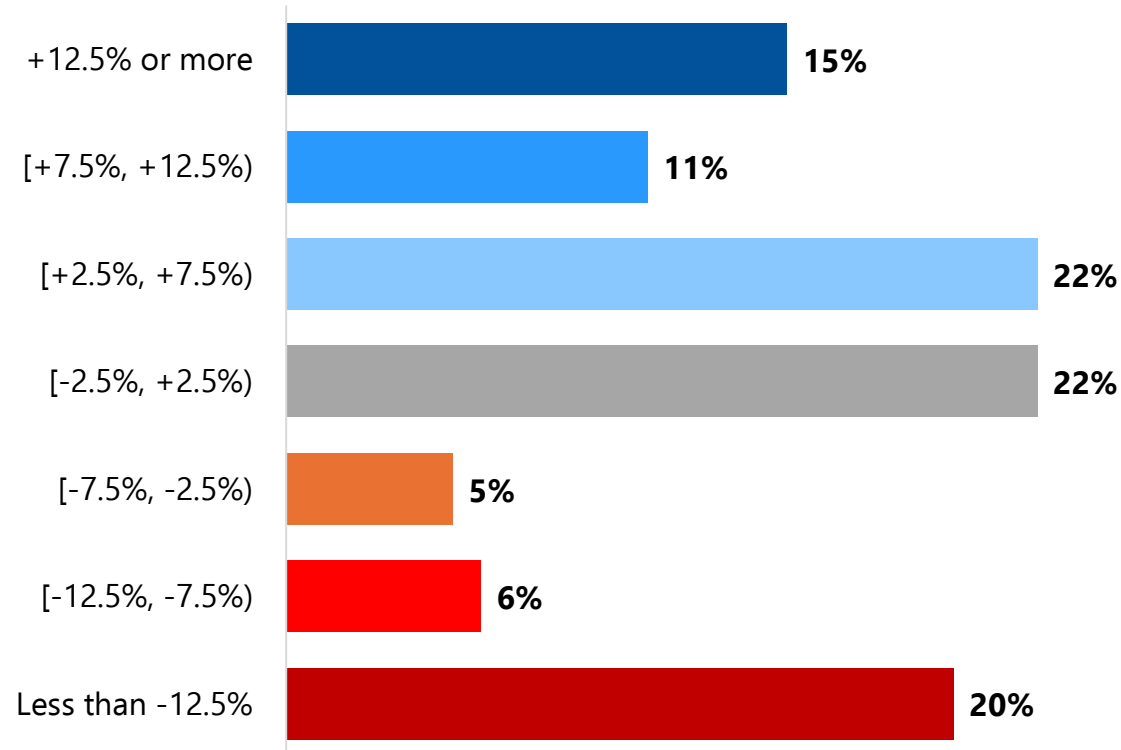
Measures to ensure that returning employees do not face career setbacks after maternity leave (%)



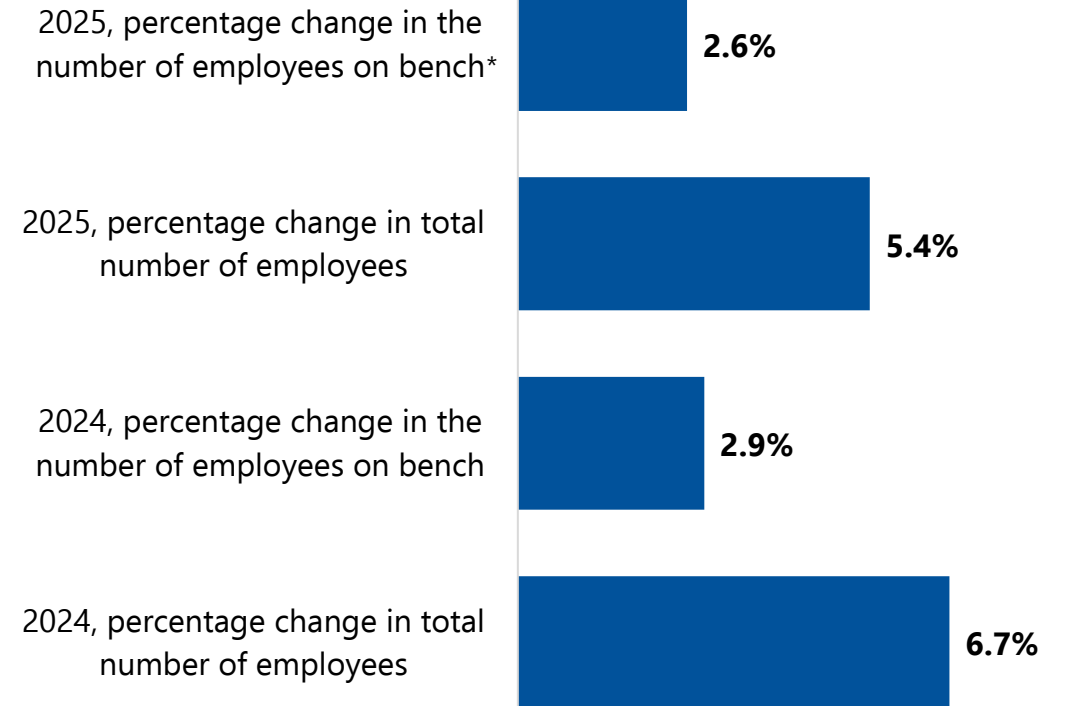
Workforce and wage changes

Most companies increased the gross wages of employees in 2025 within a moderate range of [+2.5%, +7.5%), however, the pace of employment slowed in 2025, with fewer new hires.

Changes in average gross wages of employees (2025)



Total number of employees (2025)

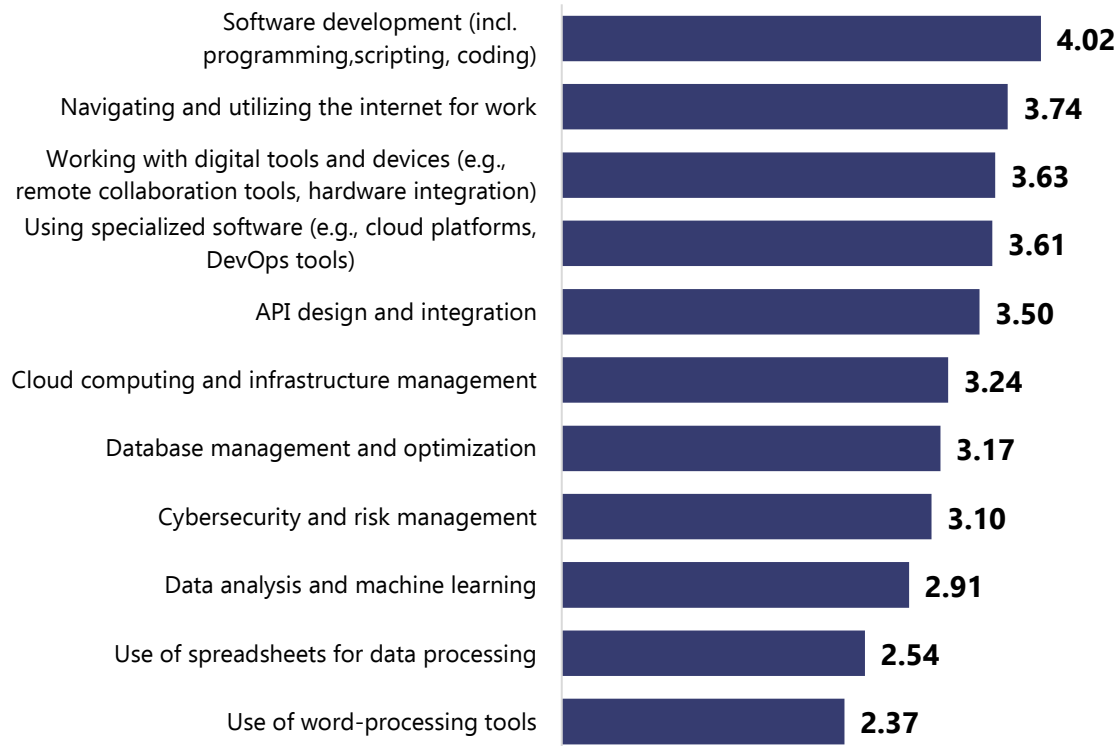


**Employees on bench: employees who are not currently assigned to a client project, however, they are still formally employed and paid by the company.*

Employee skills

Soft skills are expected to outweigh hard skills in importance, with slightly higher average scores. The most important hard skill is software development (4.02), while the top soft skills are problem-solving and critical thinking (4.45).

Hard/technical skills needed when employing new core-IT personnel (1-5 Likert scale*)



*5-point Likert scale; 1=Not at all, 5=Greatly

Soft skills needed when employing new core-IT personnel (1-5 Likert scale*)

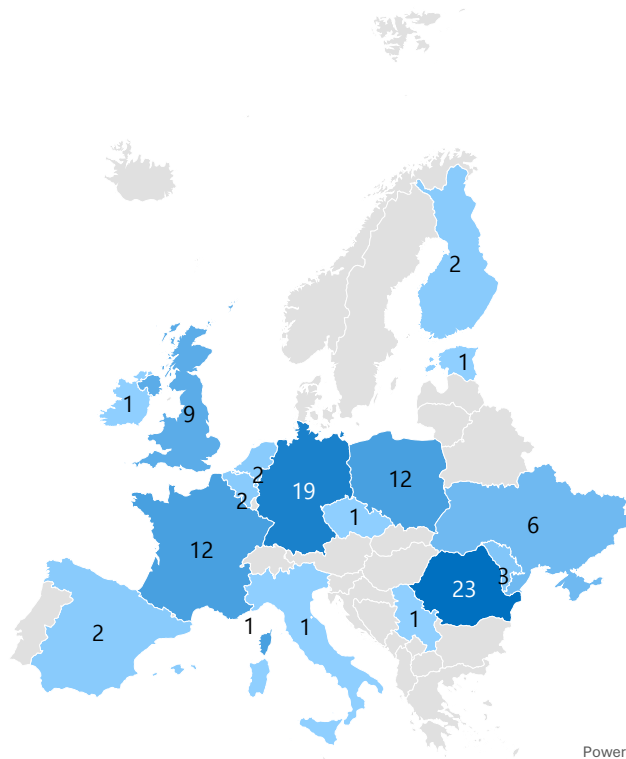


Market internationalization (1)

In Europe, Romania, Germany, France, and Poland are the main competitors for Romanian IT companies, while globally the USA is the most important.

The most important competitors in Europe

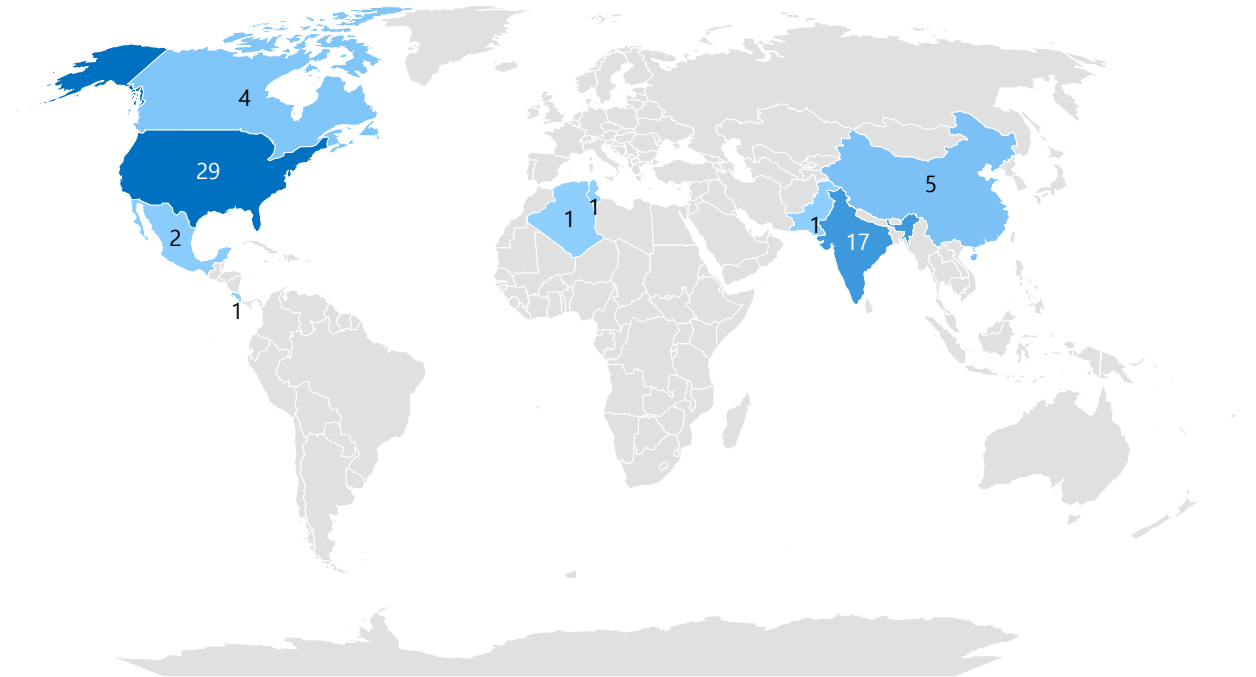
Most important competitors in Europe.



Powered by Bing
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The most important competitors outside Europe

Most important competitors outside Europe.



Powered by Bing
© Australian Bureau of Statistics, GeoNames, Microsoft, Navinfo, OpenStreetMap, Overture Maps Foundation, TomTom, Zenrin

Market internationalization (2)

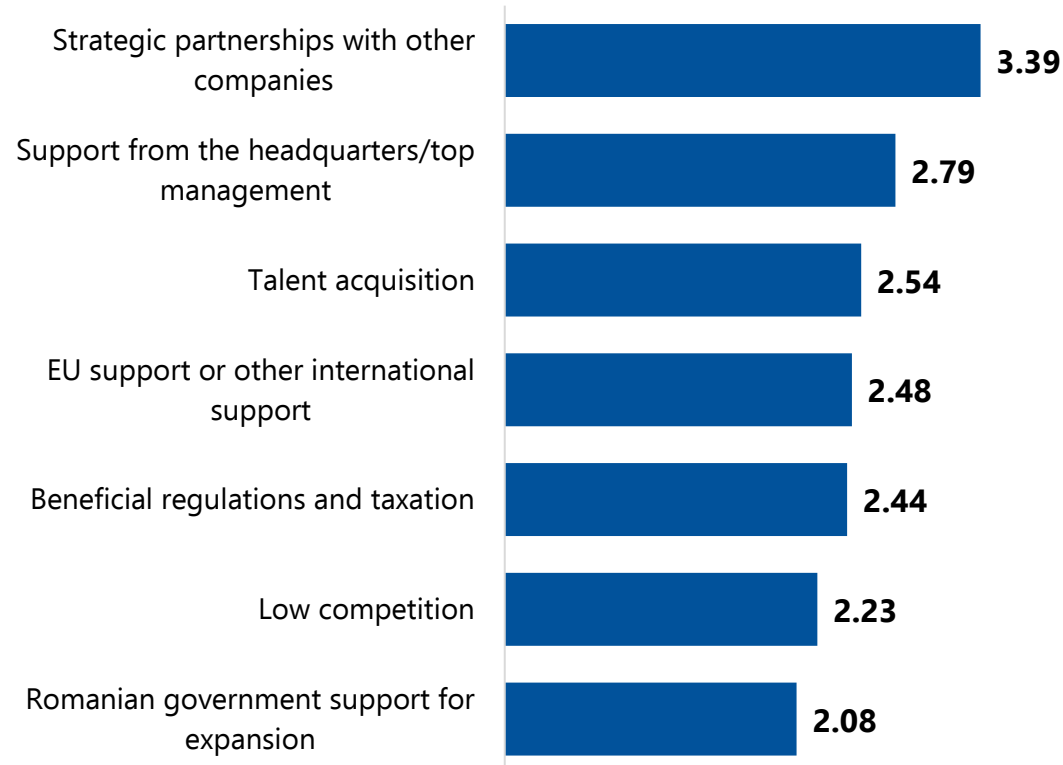
Internationalization may be a challenging task for Romanian IT companies, as many face market entry and competition barriers and limited international visibility. Strategic partnerships with other companies may help mitigate these barriers.

Extent of perceived barriers in IT company internationalization (1-5 Likert scale*)



*5-point Likert scale; 1=Not at all, 5=Greatly

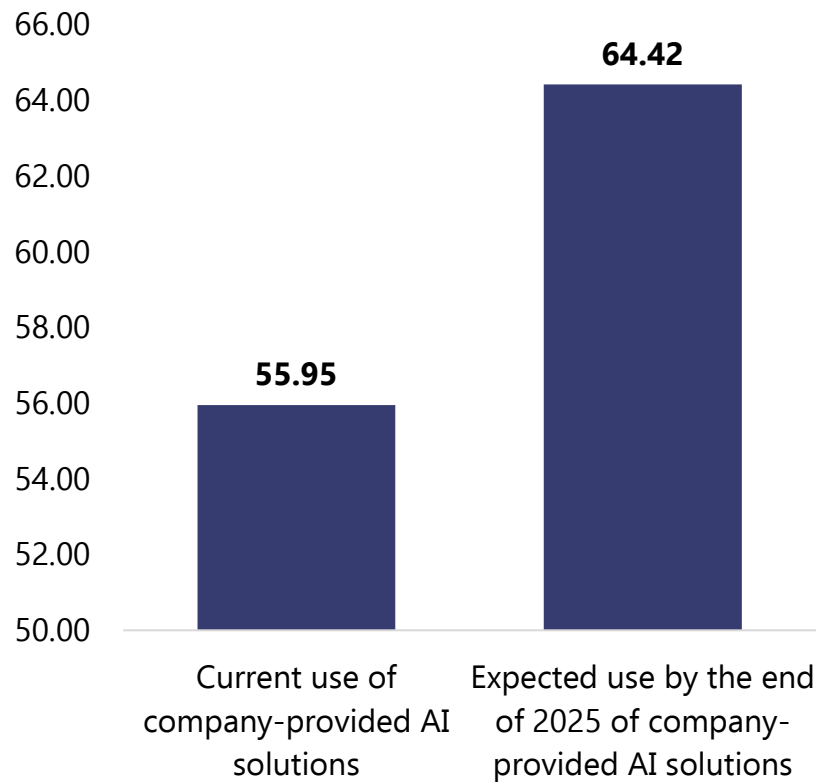
Extent of perceived opportunities in IT company internationalization (1-5 Likert scale*)



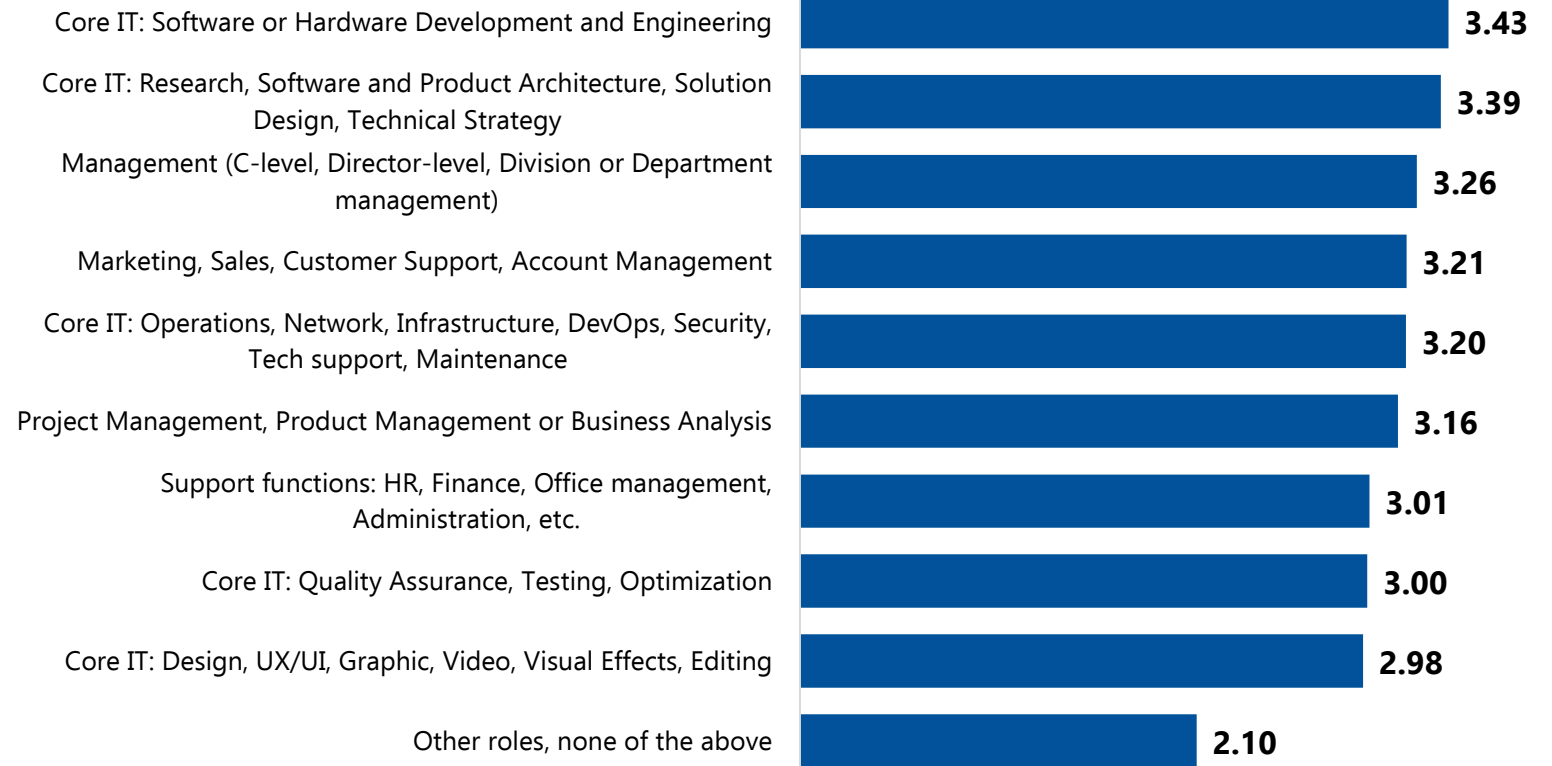
AI use (1)

IT employees are already using AI; by the end of 2025, almost 65% are expected to use an AI solution provided by their company.

Share of employees using AI solutions in their daily tasks (%)



Extent of AI use in company* departments (1-5 Likert scale)**



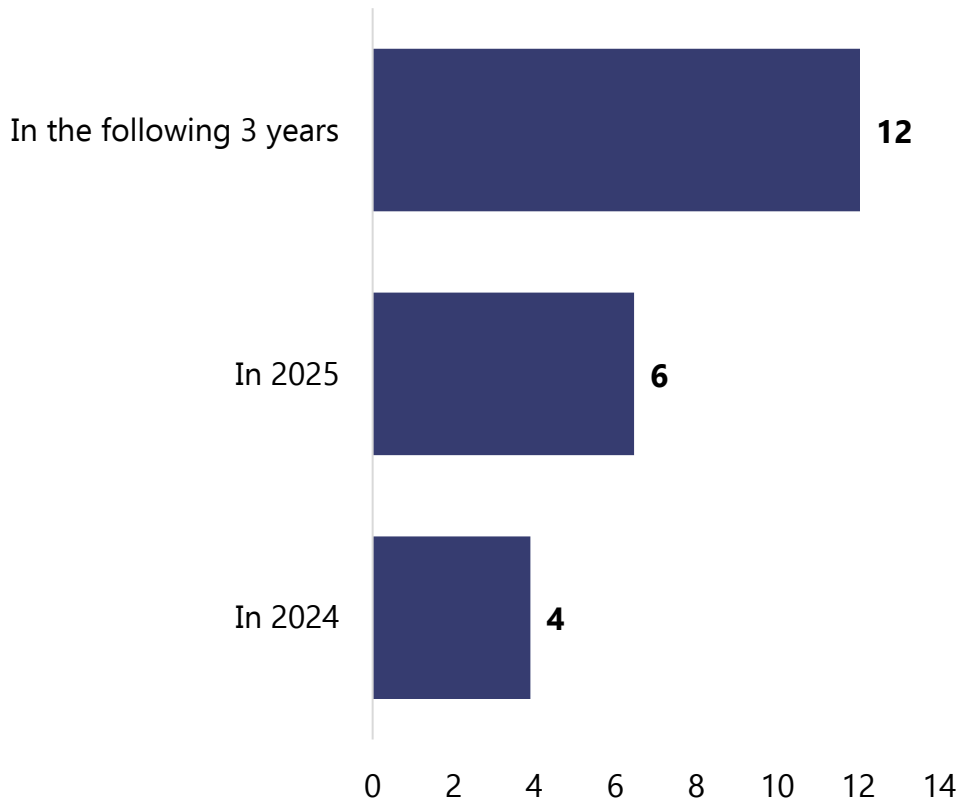
**5-point Likert scale; 1=Not at all, 5=Greatly

*Only larger firms (50+ employees) with multiple departments

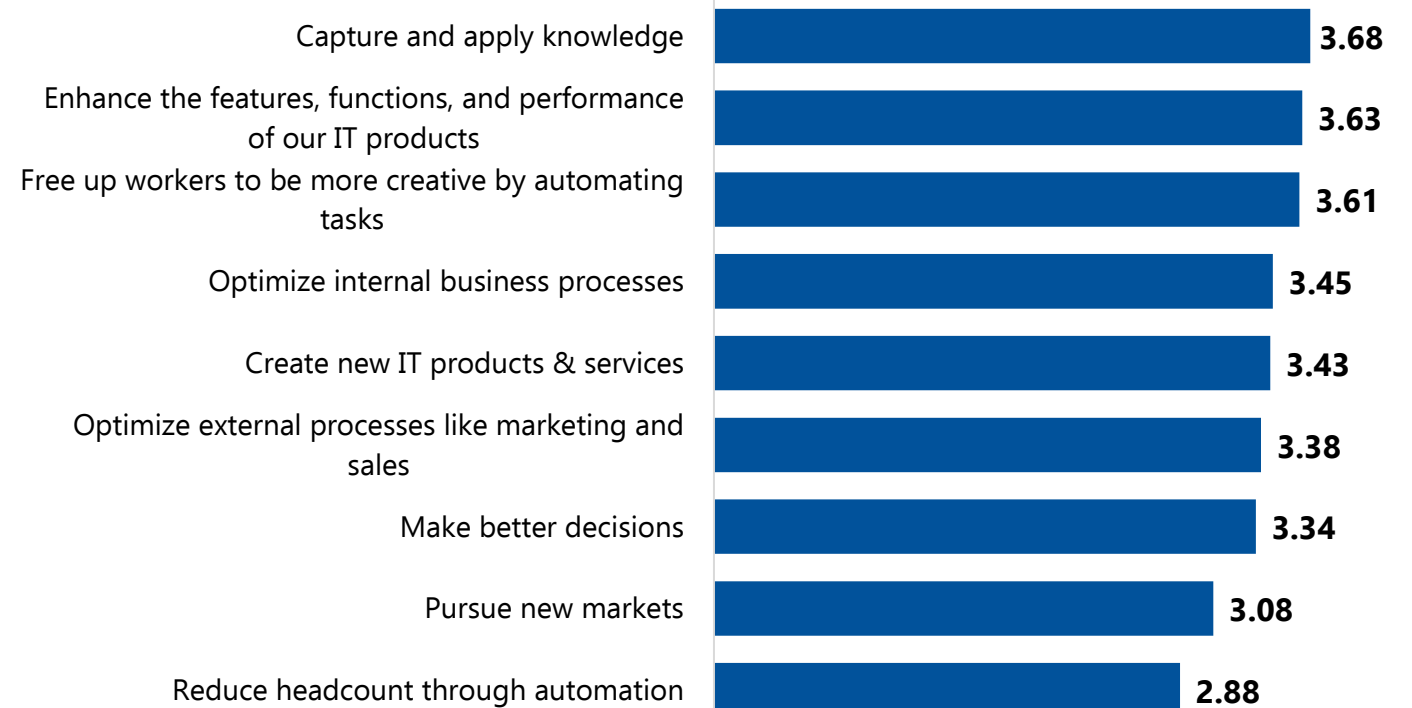
AI use (2)

In 2025, 6% of jobs are replaced by AI, but this is expected to rise to 12% by 2028. The most important use of AI is to capture and apply knowledge.

IT jobs replaced by AI solutions (%)



Perceived usefulness of AI solutions across business domains (1-5 Likert scale*)

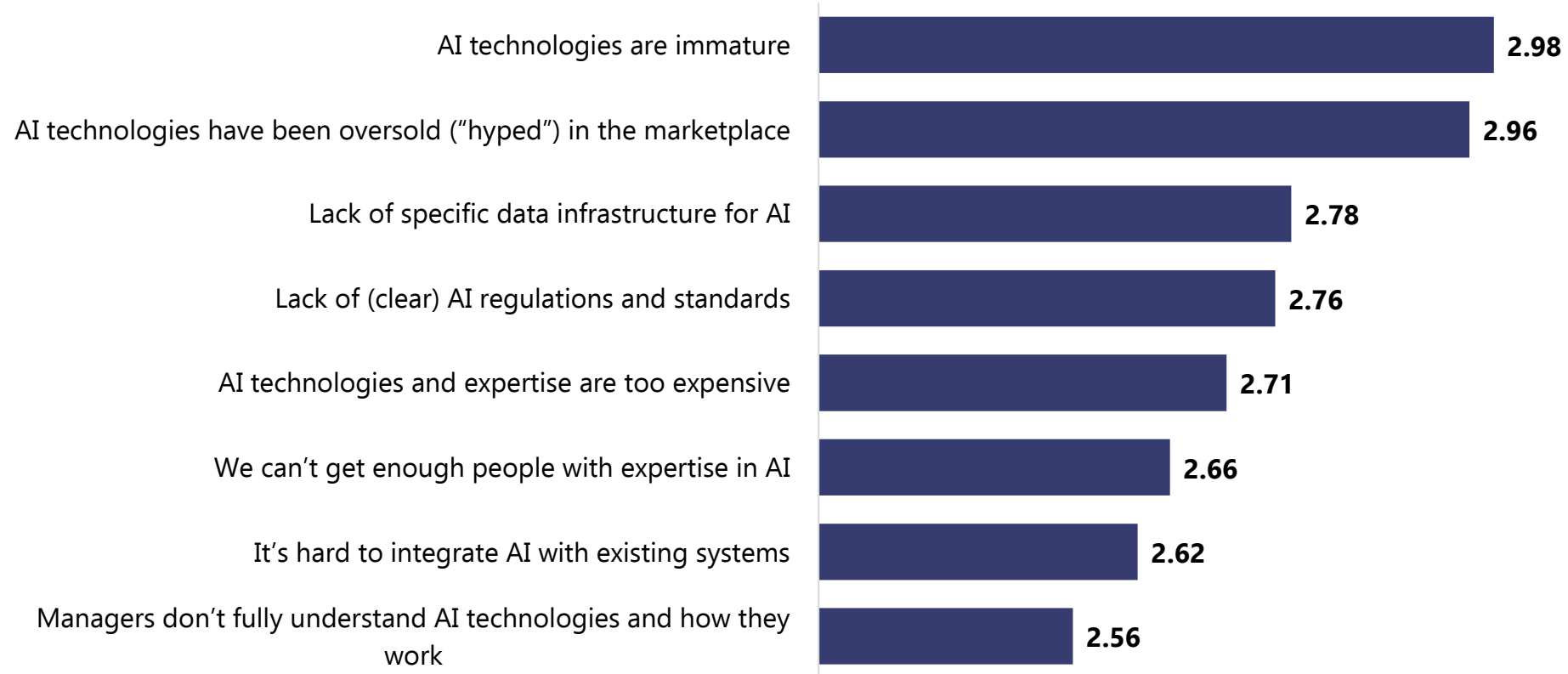


*5-point Likert scale; 1=Not at all, 5=Greatly

AI use (3)

IT companies consider AI technologies to often be immature, which can be a barrier to their implementation. Many also believe that AI is currently oversold.

Perceived barriers to implementing AI solutions (1-5 Likert scale*)

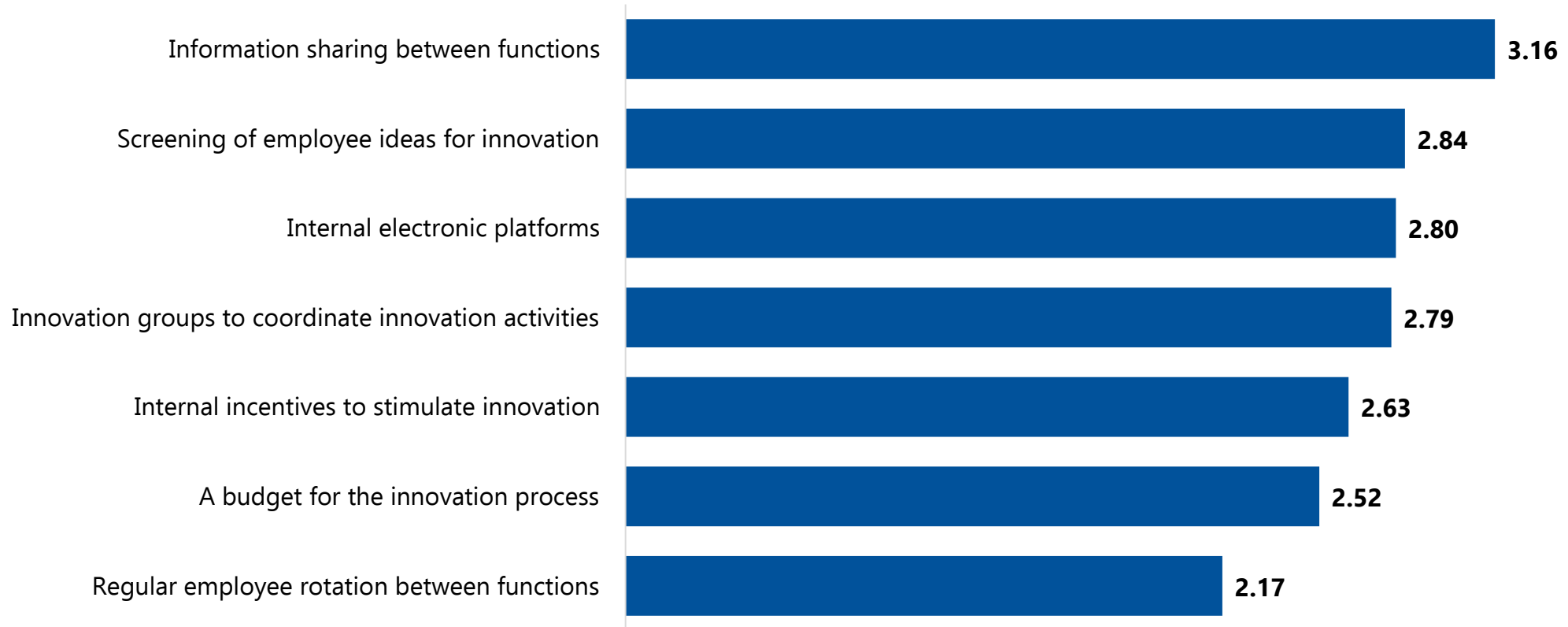


*5-point Likert scale; 1=Not at all, 5=Greatly

Innovative projects (1)

Innovative projects are mainly supported by information sharing between functions, while structural mechanisms such as dedicated budgets for innovation remain underutilized.

Extent of using internal activities to support innovative projects (1-5 Likert scale*)

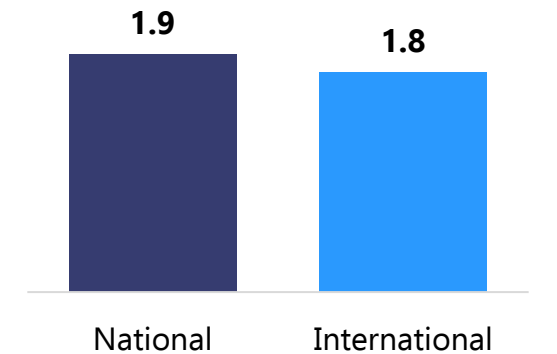


**5-point Likert scale; 1=Not at all, 5=Greatly*

Innovative projects (2)

Both national and international funds are used to support innovative projects, while in terms of external cooperation, other IT companies and universities are the main collaboration partners.

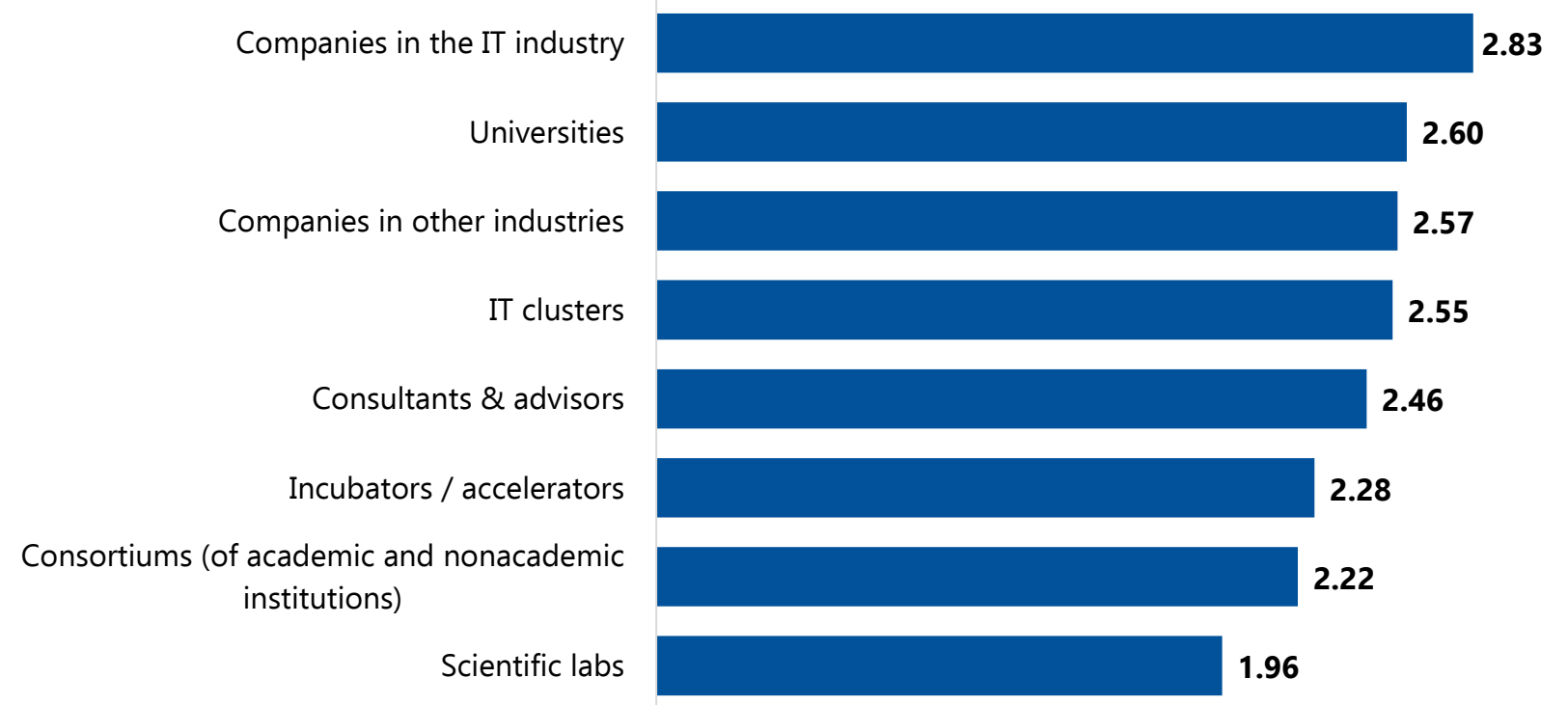
Extent of using national and international funds* to support innovative projects in the past 3 years (1-5 Likert scale**)



National and international funds are equally important for supporting innovative projects; however, the **averages are quite low**, indicating that **companies do not rely heavily on them**.

*Funds: grant opportunities

Extent of cooperation with external entities in innovative projects (1-5 Likert scale**)

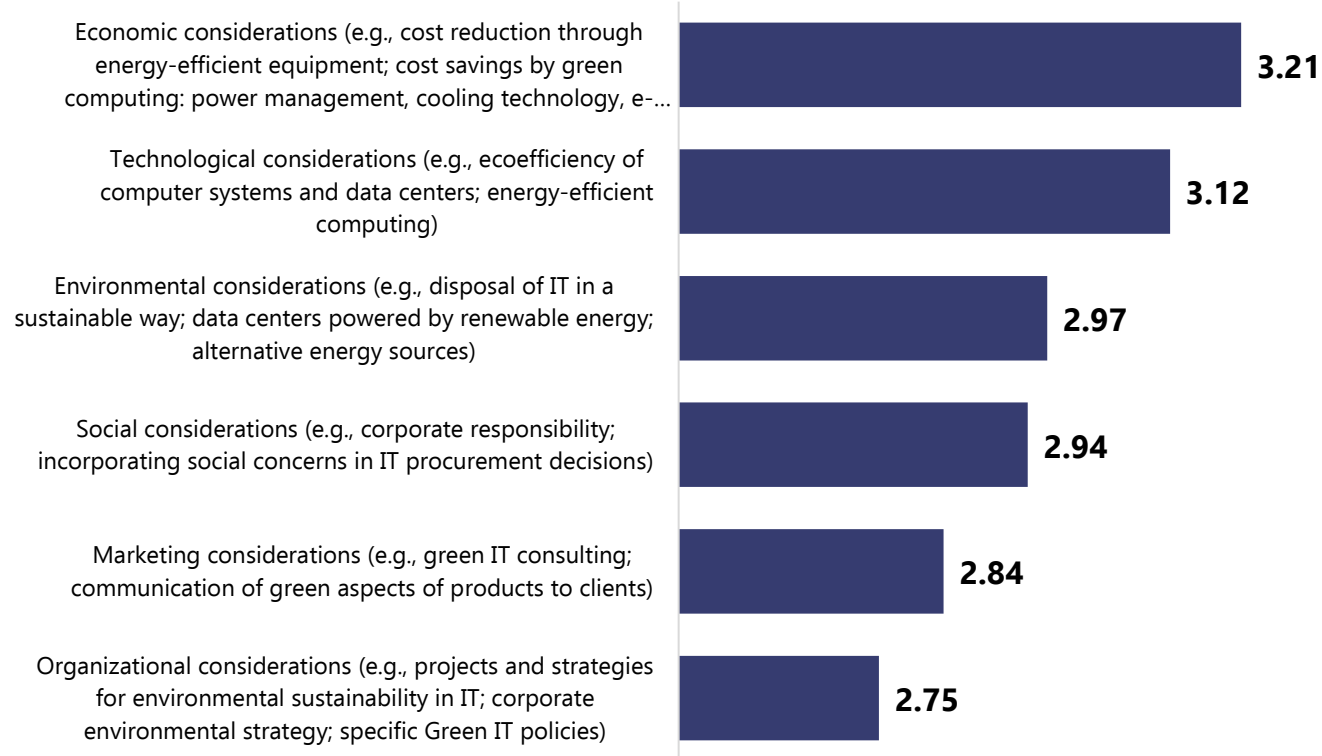


**5-point Likert scale; 1=Not at all, 5=Greatly

Environmental sustainability

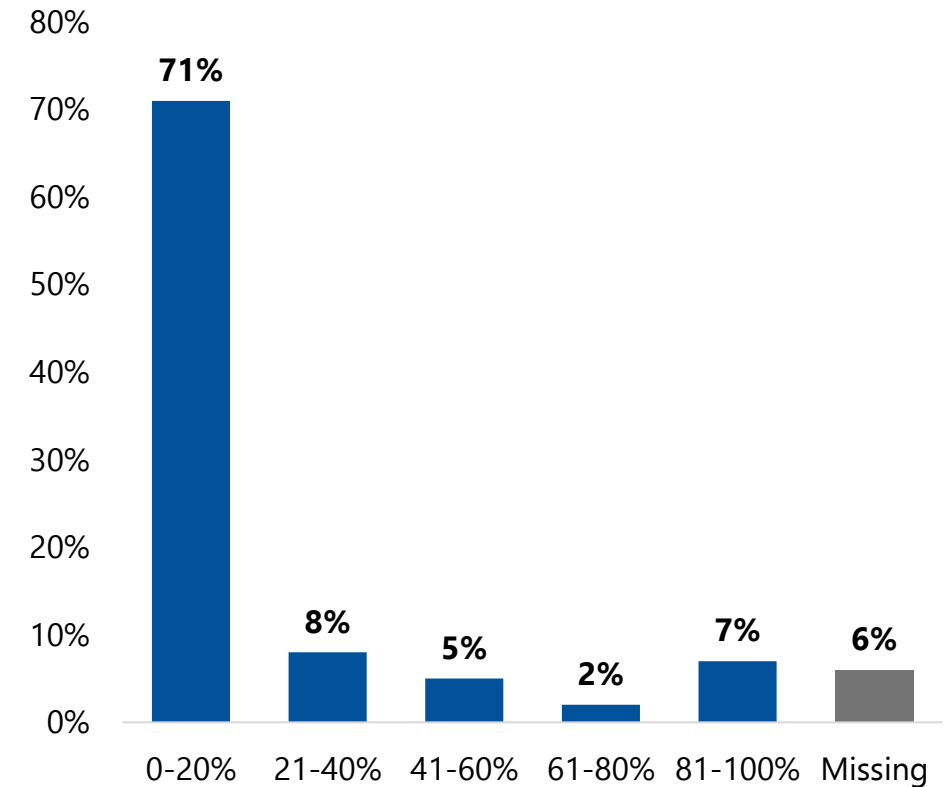
Companies mainly consider economic factors when implementing green IT (e.g., cost savings through energy-efficient equipment), but their revenue is not strongly linked to green IT products.

Extent to apply the following IT-related green considerations at company-level (1-5 Likert scale*)



*5-point Likert scale; 1=Not at all, 5=Greatly

Sales in 2024 derived from IT products focusing on green considerations (%)



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Survey | **Interviews**

Policy recommendations

Sample

Six IT companies participated in the interviews, where eight different topics were discussed.

Company code	Sub-sector	Number of employees	Founding year	Interviewee position	Interview date
A	Electronic commerce	0-10	2025	CEO	04.08.2025
B	Electric network charger solutions.	0-10	2021	Co-founder	31.07.2025
C	Software development	150-200	1998	COO	05.09.2025
D	Software engineering, custom software development	200-250	2015	Financial director	28.07.2025
E	Software development	600-650	2008	CFO	02.09.2025
F	Technology consultancy	0-10	2005	CTO	05.11.2025

Semi-structured interviews focusing on the following 8 topics



Future outlook



Employees



Internationalization



AI use



Collaborative ecosystems



Sources of financing for innovation



Workforce diversity



Environmental sustainability

Future outlook

Despite past negative events, such as major changes in Romanian fiscal policies affecting the IT sector and the global slowdown in the industry, players in the IT field are showing signs of optimism.

KEY PATTERNS AND TENDENCIES



CHANGING FISCAL LANDSCAPE IN ROMANIA

- **Fiscal and legal changes are frequent** and unpredictable, creating **challenges for planning**. Changes affect not only tax incentives but also transfers, deductibility rules, and other fiscal measures. **(B, C, D, E)**
- **Tax inspections** have become somewhat fairer, but a **true partnership approach is lacking**. **(C)**



APPEARANCE OF ARTIFICIAL INTELLIGENCE

- **AI is transforming workflows and business models**. Adoption is stabilizing, now seen as a real but costly investment. **(A, B, C, D)**
- AI product quality depends on **high-quality, standardized data** and **robust data warehouses**. Companies with database reconfiguration expertise have a clear opportunity. **(D)**
- **Incentives for AI adoption** are essential to keep Romanian companies competitive internationally. **(B)**
- Beyond coding, industry expertise is crucial. **IT companies may pivot toward industry consulting** as AI supports coding tasks. **(E)**



WORKFORCE DYNAMICS & TALENT ACQUISITION

- **Salary growth continues**, but the turnover decreases. **(A, D)**
- **Subcontracting challenges in Romania**; employees working abroad (PFA) can earn more. **(C)**
- **Close collaboration with universities** supports recruiting and research projects (e.g., EU projects). **(E)**
- **The labor market is maturing**, giving employers slightly more bargaining power. **(E)** There's a **general IT market correction**, and only the good and best employees will stay. **(F)**



QUOTES FROM INDUSTRY PROFESSIONALS

“Both globally and locally, this year has been marked by a lot of uncertainty. First came the tariff issues in the United States, followed by political instability here in Romania – and we are still in a period of significant uncertainty, as new policy packages are being introduced.” (A)

„The Romanian market is optimistic and gradually stabilizing. It is converging toward the European market. At the same time, a local knowledge base has emerged, although it is still relatively young.” (C)

„From the perspective of market trends, I observe a transformation in the demand for IT services. Regarding demand, there are many requests in the data area and in related fields.” (D)

Employees

IT personnel hiring has slowed down amid various internal and external factors. Shortages and the need for new skills are being addressed through additional training.

KEY TENDENCIES AND TACTICS



GENERAL SLOWDOWN IN HIRING

- **General hiring slowdown due to fiscal uncertainty (B, C)** and even **layoffs. (F)**
- **IT hiring has decreased:** over the past two years, the company has fewer employees, with several on parental leave. Revenue has declined by around 10%, with profit margins decreasing even more, driven by overall market trends. **(C)**



DEVELOPING NEW SKILLS

- **Continuous investment in employee upskilling,** particularly in **AI-related areas,** and **cross-training** to address the shortage of green IT expertise. **(B, C, D, E)**
- **Reskilling:** Where needed, employee requalification programs were organized. **(D, E)**
- **Generations working together** is the best way to educate people. **(F)**



FINDING THE RIGHT PEOPLE WITH THE RIGHT SKILLS

- **Hiring the right talent is a growing priority,** but it comes with challenges. **(A, E)**
- **Filtering:** Technical tests (open book, problem-solving) plus cultural fit assessment through face-to-face interviews. **(A)**
- **Onboarding:** 1–3-month adaptation period, a training phase to help new employees adjust. **(A)**



COMMUNICATION AS A KEY SUCCESS FACTOR

- Focus on **harmonizing internal communication** to ensure clarity and alignment across diverse roles. **(B)**
- **Communication fosters cross-training,** bringing together people with different skill sets to create synergy and mutual learning. **(B)**



QUOTES FROM INDUSTRY PROFESSIONALS

“Where retraining is needed, we manage this process to ensure employees are as versatile as possible.” **(D)**

„When it comes to employee training, we focus heavily on developing our people already during their university studies.” **(C)**

“There was, in a way, an exchange of information between the technical and non-technical areas, and this is actually the secret within an organization: for business and technical people to arrive at very simple concepts, without complicated terminology, so that they can meet at a common point.” **(B)**

„I think combining employees with different skills and attitudes is probably the most effective approach.” **(F)**

Internationalization

Romanian IT firms provide high-quality services, making them competitive in the international market. Despite certain barriers, they can still attract new customers.

KEY ADVANTAGES AND MAIN MOTIVATIONS



TECHNOLOGICAL (AND PRICE) ADVANTAGE OF ROMANIAN FIRMS

- Operating at the **technological forefront** with recommendation systems. **(A)**
- Competitive edge through high-quality B2B software services and **effective client communication**. **(D)**
- **Price advantage** (but fading as tax exemptions are removed). **(A, D)** Some say Romanian IT resources are getting too expensive now. **(F)**



AIM TO ATTAIN NEW CUSTOMERS

- **Growth requires entering international markets**. **(A)**
- If is **planned to be international from the start**, it becomes easier to expand globally. **(B, D)**



INTERNATIONALIZATION FOUNDED ON QUALITY

- Competitive advantage in Europe stems from **high-quality software services**. **(D)**
- **Teams are professional, hardworking, and reliable**. **(D)**
- **Strong communication skills** enhance collaboration and client relationships **(D)**, **personal connection** is also beneficial **(F)**



BUT SOME BARRIERS INCLUDE...

- **Lack of standard (green) IT knowledge** is a challenge when competing with firms in more mature markets. **(B)**
- Not every firm can serve clients in foreign markets due to **industry-specific** (such as automotive, insurance etc.) **and country-specific barriers**. **(E)**



QUOTES FROM INDUSTRY PROFESSIONALS

"The competitive advantage of Romanian software service companies is based on the **quality of the services we provide**. We are highly **professional, hardworking, and communicate very effectively**." **(D)**

"Our goal has been to become the '**green online retailer for Central and Southeast Europe**, aiming to be a regional expert and integrate solutions and products from the region." **(B)**

"It was natural for us to start this way, as most of the leadership team **already had experience working with international companies**." **(D)**

"There's also an element of trust involved, especially in the automotive industry. It's not always easy to become part of that network. (...) There are cultural and national differences that often make it difficult to be truly strong on a global level." **(E)**

AI use

IT companies already use AI for various tasks, and there is also strong market demand for AI solutions. Bottom-up employee initiatives exist, but there is also fear of job loss.

USE CASES, DRIVERS AND BARRIERS



AI USE CASES

- **Coding and development:** AI-assisted coding and testing to boost productivity. (A, C, F)
- **Content generation and research:** generating all kinds of content; market and competitor analysis. (A)
- **Customer support:** AI chatbots and personalized recommendations improve service and engagement. (B)
- **Data and process automation:** automated testing and workflow optimization. (E)



DRIVERS IN AI ADOPTION

- **Employee-driven initiatives:** bottom-up proposals to make work more efficient. (A)
- **Efficiency and innovation:** compensate for reduced budgets and fewer resources, improve processes, and support product development. (B, C, F)
- **Competitive pressure:** Open AI emergence, companies must adopt AI or risk falling behind. (D)
- **Market demand:** demand for AI solutions exists. (D)
- **Employee growth and value-added:** shift focus from repetitive tasks to higher-value activities. (D)



BARRIERS IN AI ADOPTION

- **Employee readiness:** need for a motivated and open-minded staff; initial skepticism about job replacement. (A, B)
- **Costs:** maintaining complex AI systems can be expensive and requires expertise. (D)
- **Change management:** adopting new systems requires mindset shifts. (D)
- **Data security:** data protection is critical. (C, D)
- **Regulatory uncertainty:** future regulations (in the EU) may introduce additional barriers. (E)



QUOTES FROM INDUSTRY PROFESSIONALS

"The moment OpenAI entered the market marked a turning point for our industry. We **were fortunate to identify this opportunity in time**, so that it did not become a threat." (D)

"Developers **can work much more efficiently with AI**. It allows you to write code more easily, and in some cases, it can even handle certain tasks automatically. This leads to increased productivity." (A)

"The **costs of maintaining and operating an AI-based a product can be high**." (D)

"The core focus would be on increasing the productivity of the existing software engineers. (...) The challenge is, how much effort does it take to get to a genuinely useful outcome? That's the main concern with it." (F)

Collaborative ecosystems

Romania's IT associations are evolving from fragmented networking platforms toward more unified, value-driven collaborations that strengthen the industry's collective voice and international presence.

KEY PATTERNS AND TENDENCIES



IMPORTANCE OF COLLABORATION AND NETWORKING

- Association members value **networking** and **international exposure** (fairs, joint stands) **(C, D, E, F)**
- Membership is **"expected"** in the local market, it helps visibility, though practical gains are limited **(E)**
- Startups and MNCs show emerging collaboration, often through **incubator-style programs** (e.g., EU Data Incubator, ADR Vest) **(A)**



STRENGTHENING THE "VOICE" OF THE INDUSTRY

- There is a recognized **need for stronger collective representation** **(D)**
- **ANIS** and **clusters** act as potential voices, but the **ecosystem** remains **fragmented** **(C, D)**
- The IT sector is seen as an engine of Romania's economic growth and deserves a **more unified stance** **(D)**



PRACTICAL SUPPORT OVER FORMAL MEMBERSHIP

- Interest is moderate: companies seek **tangible benefits, practical support** (funding, sales opportunities, knowledge sharing) **(B, F)**
- Associations perceived as useful only when **real business or policy impact** occurs (e.g., taxation, labor market challenges) **(D)**



THE ECOSYSTEM IS IN AN EARLY STAGE

- The **collaborative ecosystem is growing** but it is immature, multiple initiatives exist, yet coordination is low **(A)**
- **Angel networks, regional development agencies**, and **startup support** structures are forming, but still lack strategic alignment **(A)**



QUOTES FROM INDUSTRY PROFESSIONALS

"We participate in various organizations mainly because they **provide access to international fairs**, where companies can appear together under a **unified structure or shared representation**. It makes a **real difference** when 20 Romanian companies are presented together at one stand – it creates a **sense of collective interest and visibility** for the entire community." **(C)**

"If you are persistent, you can manage to **build a fairly valuable network** through such interactions." **(D)**

"I think we should be more vocal, as **the IT industry is very important for Romania**, being one of the main engines of growth." **(D)**

Sources of financing for innovation

Romanian IT companies rely mainly on internal funding and client-based innovation, as access to venture and public financing remains limited, complex and uncertain.

KEY PATTERNS AND TENDENCIES



DOMINANCE OF INTERNAL FINANCING

- IT firms rely on **internal cash flow** and **reinvested profits** to fund innovation (C, D, E, F)
- **Financing is cautious** and integrated into operational budgets to avoid risk (D)
- **Bank loans** are rather **avoided** (D)
- There is a need for **diversified financing sources** (funds, angel investment, venture capital) (A)



EXISTING SOURCES OF EXTERNAL FINANCING

- **Non-reimbursable local or EU funds** are the most popular (D), **venture capital** and **angel investment** opportunities also exist, however, Romania lags behind its regional peers in the latter (A)
- Angel investments **peaked in 2022** and declined since (A), venture capital firms are **more selective**, shifting their focus to **defense and AI** (B)



CO-DEVELOPMENT AND REAL PROJECTS BOOST INNOVATION

- Many companies **co-develop solutions with clients**, sharing technological learning rather than owning intellectual property (C, D)
- **Innovation emerges from applied projects** rather than formal R&D programs (C, D)



STRUCTURAL AND CULTURAL BARRIERS

- Bureaucracy (D), administrative complexity (A, B), shifting rules (D) and eligibility limits **reduce access to external sources of financing** (D)
- **Risk aversion** among entrepreneurs constrain innovation potential (C)
- **Lack of "Green IT" specific** financing programs (B)



QUOTES FROM INDUSTRY PROFESSIONALS

"There is also a problem at the level of investors' attitude. Of course, there is a **lack of courage** as well, which seems to be an almost genetic trait of Romanians, linked to the **difficulty of trusting their own abilities**." (B)

"It's about **non-reimbursable external funding**, which is usually the first place we look. In general, we search for this type of funding sources. So far, **we have accessed local schemes**." (D)

"We are also **trying to access funds directly from the European Union**, but since we are not a product-type company, this is a bit more complicated." (D)

Case Study – Mindit Services (mindit.io, Bucharest)

Supporting a women-led AI and data transformation company on its growth journey

BACKGROUND & EBRD SUPPORT



COMPANY PROFILE

- **Founded in 2015** by experienced software professionals, expanded across Romania and Europe (Switzerland, Germany)
- **Women-owned and led** – woman founder and sole owner, 60% of top management are women
- **Accelerated growth** – avg. 30% y-o-y (2019-2025), €19.2 M turnover & 243 employees (2025), 90% of business outside Romania



COLLABORATION WITH THE EBRD

- **Challenge:** maintaining the growth rate through a scalable and sustainable process of business development
- **2019:** Joined the EBRD's Leadership in Action training*
- **2020:** Worked with a Romanian consultant to improve marketing**
- **2021:** Worked with a Romanian consultant to amplify the impact of company leadership**
- **2022-2024:** Worked with a team of Swiss and British consultants to define the business strategy and boost sales***
- **2023-present:** Yearly participation in the EBRD's Women on Boards Programme* (including speaking engagements)

* Financed by the EBRD's Small Business Impact Fund (SBIF)

** Co-financed by the EBRD using EU funding under Horizon 2020

*** Co-financed by SBIF



IMPACT

- **Marketing:** Established lead generation processes and secured new clients
- **Sales:** Developed tech leadership position with new go-to-market messaging and marketing tech; strong customer feedback
- **Organization:** Transformed the company's entire structure to accommodate an expanding team and new geographies
- **Strategy:** Transitioned to focused consultative sales (doubled the number of customers by the end of 2025)
- **Networking:** Joined international EBRD events and initiatives to share their own expert knowledge



QUOTES FROM MINDIT.IO MANAGEMENT

"From day one, we built mindit.io as an international company, grounded in solid business and financial foundations and driven by the ambition to create meaningful global impact. Our partnership with the EBRD sharpened our focus and strengthened our consultative sales approach as they guided us through the early stages of our scaling journey.

Today, our competitive advantage lies in delivering cutting-edge AI and data solutions globally, with the agility needed to support organizations through fast-evolving transformation challenges.

Our path is clear: we will continue enabling companies worldwide to navigate increasingly complex AI transformations and achieve real, long-term business value."

Irina Arsene, mindit.io CEO

Environmental sustainability

Sustainable and green aspirations are not integrated into the companies' IT strategy, rather, they appear at the level of CSR initiatives, such as tree planting and supporting IT education.

KEY PATTERNS AND TENDENCIES



SUSTAINABILITY IS NOT THE CORE IN THE STRATEGY OF IT FIRMS

- Sustainability is **not integrated into the IT strategy** (A, B)
- Sustainability is seen more as **cultural awareness on the level of employees** than structured action (A)
- **Home office** options (D) and **"only a laptop"** being **the main resource** (F) reduce carbon footprint, thus being more sustainable



THE CONTRADICTION SIDES OF "GREENING" THE IT INDUSTRY

- "Green" aspirations are **difficult to realize: sustainability reports** are expected, but the **working space** used, and the **AI's high energy consumption** are far from green (C, F)
- Overall, there is a **skepticism** toward the practicality of "greening" IT infrastructure (C)



"GREEN" MOTIVATION IS DRIVEN BY ETHICAL FACTORS

- **"Green" actions** mostly appear as **CSR initiatives**: tree planting, volunteering, education for women and children, supporting the consumption of plant-based food (D)
- Company (E) is developing **a tool for ESG reporting** voluntarily



"GREEN" BUSINESS OPPORTUNITIES WITH THE EYES OF INTERVIEWEES

- Company (E) identified a **market niche** in **offering ESG digital tools** to clients
- Company (B) claims that "client demand for eco-conscious features is **stable but not accelerating**"



QUOTES FROM INDUSTRY PROFESSIONALS

"We try to **implement certain policies** as much as we can." (D)

"This is the second year we have to report our **CO₂ emissions**, including everything related to it, but we don't receive any additional financial support for it." (C)

"We're in a building that's very poorly insulated – so it's anything but green. The question is whether it's worth replacing things and paying much more or rather keeping them as they are." (C)

"We consciously **separate all waste** and have specific contracts for that." (C)

"We don't have many devices, so our direct **impact is quite small.**" (D)

Green IT solutions - Summary

Green IT adoption remains limited as sustainability is not yet strategically integrated and market incentives are weak, highlighting the need for stronger policy and financial support.

SUSTAINABILITY IS NOT YET STRATEGICALLY INTEGRATED

- Sustainability considerations are **rarely embedded in core IT strategies** and appear mainly as CSR initiatives (e.g., tree planting, volunteering, education programs)
- **Environmental awareness** exists primarily at the **employee** or **cultural level**, rather than through structured organizational policies
- Operational practices such as **remote work** or **minimal device usage** are seen as indirect ways to reduce environmental impact

LIMITED MARKET INCENTIVES FOR GREEN IT

- Most companies generate very limited revenue from green IT products or services, with **the majority (71%) reporting less than 20% of sales are linked to green IT solutions**
- While some firms identify opportunities in **ESG digital tools**, market demand for eco-conscious features remains stable but not rapidly growing

ECONOMIC FACTORS DRIVE GREEN IT ADOPTION

- Companies prioritize economic and technological considerations, particularly **cost savings through energy-efficient equipment** and data center optimization
- AI infrastructure and digital systems are often perceived as energy intensive, increasing **skepticism about the feasibility of fully “green” IT operations**

STRUCTURAL BARRIERS TO GREEN IT IMPLEMENTATION

- Companies face high implementation costs, infrastructure constraints, and **limited financial support for sustainability initiatives**
- Sustainability reporting requirements are increasing, yet **dedicated funding mechanisms and incentives remain scarce**
- These factors contribute to **scepticism regarding the practicality of greening IT infrastructure**



KEY INSIGHT

To accelerate the adoption of Green IT solutions, stronger policy frameworks, targeted funding programs, and financial incentives are needed to support sustainable digital infrastructure and innovation in the IT sector.

Executive summary

The IT industry from a macroeconomic perspective

Global IT industry | Romania's IT competitiveness | Romanian ICT industry analysis

IT companies in Romania

Performance of IT companies | Regional distribution | Major IT hubs

Analysis of operations in IT companies in Romania

Survey | Interviews

Policy recommendations

Policy recommendations

Current status: the Romanian IT industry is both **strong** and **vulnerable**.

+ Based on its size, talent pool and infrastructure it can become a **regional champion**, but...

! Due to the mostly outsourcing-based business model (60% share in our survey), the 87% geographic concentration, the weak external financing and collaboration for innovation, and the frequently changing fiscal landscape it can easily remain **trapped on a medium value-added development trajectory**.

EXISTING MAJOR PUBLIC POLICIES & SUPPORT MECHANISM

01

National Strategy for Research, Innovation & Smart Specialisation 2022–2027

Strategia Națională de Cercetare, Inovare și Specializare Inteligentă 2022–2027

Romania targets 1% GDP public + 1% GDP private R&D expenditure by 2027.

 research.gov.ro

02

National Strategy for Artificial Intelligence 2024–2027

Strategia națională în domeniul inteligenței artificiale 2024–2027

Adoption of digital technologies promoting excellence and trust in AI, respecting human rights.

 research.gov.ro

03

Smart Growth, Digitalization & Financial Instruments Programme (PoCIDIF) 2021–2027

Programul Creștere Inteligentă, Digitalizare și Instrumente Financiare 2021–2027 (PoCIDIF)

Targets national-level R&D, strategic technology, digitalization, and financial instruments.

 mfe.gov.ro/pocidif

04

Romanian Authority for Digitalisation (ADR)

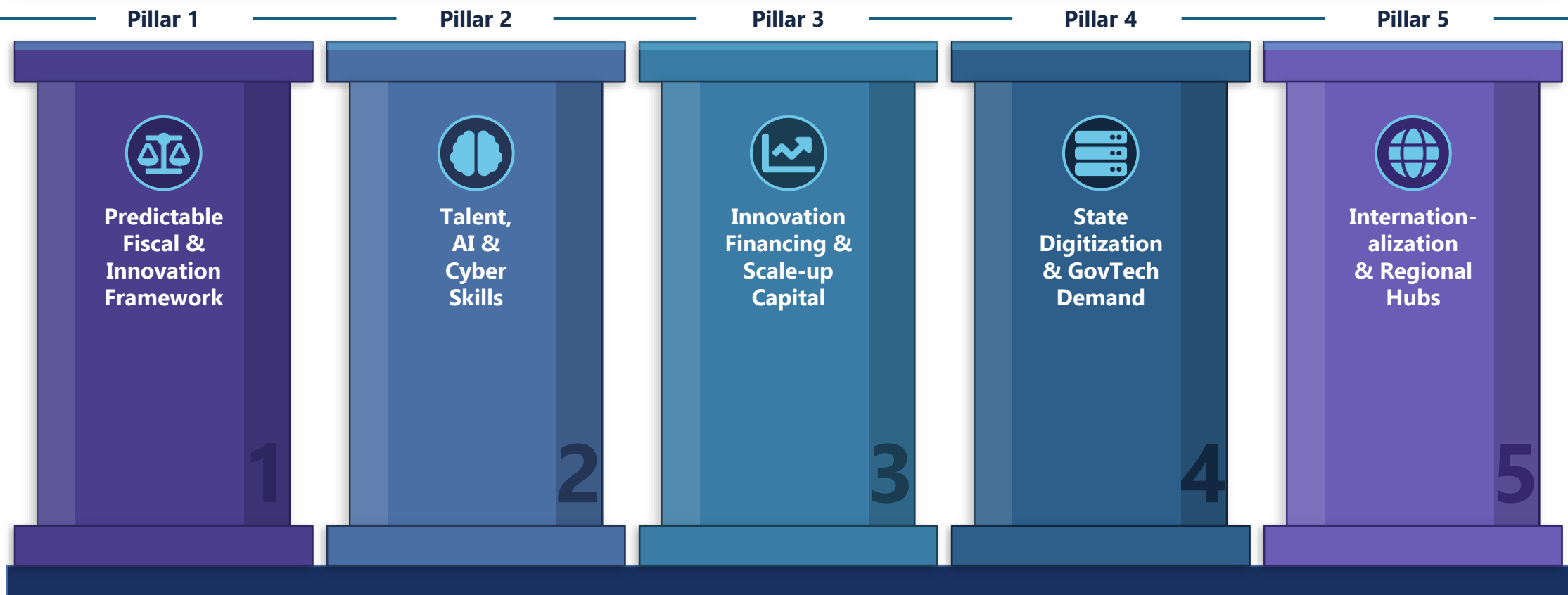
Autoritatea pentru Digitalizarea României (ADR)

Building the domestic digital ecosystem: government digitalization, smart procurement, digital marketplaces.

 adr.gov.ro

A recommended 5-pillar policy blueprint

Future-proof and regionally competitive
IT industry in Romania



Pillar 1 – Predictable fiscal & innovation framework

More than 80% of Romanian IT firms cite **unpredictable tax policy** as the most important **threat***, confirmed by our interviews as well. Inspired by Ireland's Knowledge Development Box, Romania should shift from the former wage subsidies to **R&D and IP-driven incentives** anchored in a **4–5 year no-surprise fiscal calendar**.

→ THE SHIFT

From basic wage subsidies to R&D and Intellectual Property (IP)-driven incentives; creating a stable multi-year tax environment.

☰ KEY ACTIONS

- Establish a 4–5 year no-surprise fiscal calendar
- Implement further phased and targeted refundable R&D tax credits for scale-ups**
- Launch a Romanian Knowledge Box pilot for locally generated IP

*** Similar to the measures introduced for all sectors by Emergency Ordinance (OUG) no. 8/2026 for economic recovery.*

🌐 INTERNATIONAL BENCHMARK - IRELAND

Adapt the Irish Knowledge Development Box with 10% effective tax rate on qualified IP and 30% R&D credits.

Adjust with strict caps to respect Romania's tighter fiscal space.

🌐 revenue.ie → Knowledge Development Box (KDB)

Source: Own compilation

*ANIS, Employers' Association of the the Software and Services Industry

Pillar 2 – Talent, AI & cyber skills

According to our survey **AI adoption by employees** in the IT industry stood at 64% in 2025. At the same time, the share of all Romanian businesses using AI was a mere 5%*. The talent pipeline has not kept pace. Inspired by Estonia's AI Leap program, Romania should deploy **stackable micro-credentials** and Applied Tech Labs to **upskill around 200,000 professionals** before the gap widens.

→ THE SHIFT

Rapid upskilling across the full educational pipeline (from school to workforce reentry) to drive corporate AI adoption (Corporate AI use in 2025 in the EU was at 19.95%, while Romania stood at 5.21% occupying the last place in the EU ranking)

☰ KEY ACTIONS

- Deploy stackable micro-credentials (AI, data, cyber, cloud)
- Fund Applied Tech Labs linking universities to industry hubs
- Provide SME upskilling vouchers (50–70% co-financed)
- Establish a Women in Tech Returnship program

🌐 INTERNATIONAL BENCHMARK - ESTONIA

Adapt: inspired by the AI Leap program targeting 20,000 Estonian students aim for integrating skills across the full educational pipeline rather than relying on isolated elite programs.

Adjust: use regional scaling instead of heavy centralization

🌐 digital-skills-jobs.europa.eu → AI Leap Estonia

Source: Own compilation

*Eurostat: Use of artificial intelligence in enterprises

Pillar 3 – Innovation financing & scale-up capital

Romanian IT companies rely mostly on internal resources for innovation, while the use of **external cooperation and financing opportunities is extremely reduced**; a structural trap that keeps companies small. Adapting Israel's Yozma model, blended finance and co-investment with private investors can **unlock the scale-up capital** the sector is missing.



THE SHIFT

Transitioning from an ecosystem less supportive for innovation towards blended finance and Venture Capital leverage; enabling Romanian tech firms to scale more dynamically and internationally.



KEY ACTIONS

- Open a Digital/AI window for targeted investment support, potentially in the framework of the newly established Investment and Development Bank (BID)
- Provide University spin-off & Proof-of-Concept seed funding
- Establish co-investment mechanism with private investors



INTERNATIONAL BENCHMARK - ISRAEL

Adapt the Yozma Logic where state matches \$0.30 per \$1 of institutional capital, driving a 4.3x leverage on state financing. Local Case: mindit.io grew to €19.2M revenue and 90% international footprint leveraging EBRD support.

Adjust by avoiding the creation of new state holding companies, use existing institutional frameworks, such as the BID



[reuters.com](https://www.reuters.com) → Israel institutional investment fund

Pillar 4 – GovTech demand & interoperability

Romania's **public sector** remains one of the weakest **digital buyers** in the EU, leaving local IT SMEs without a reliable large client. Taking Estonia's X-Road as a blueprint, mandatory API standards and a GovTech marketplace can turn the state into a platform builder and demand driver.

→ THE SHIFT

The state evolves from passive procurer into active reference buyer and digital platform builder; creating reliable, internal demand for local IT SMEs that drives massive administrative savings and spurs local SME innovation.

☰ KEY ACTIONS

- Implement mandatory API standards & once-only principle via the recently started ADR (Authority for the Digitalization of Romania) project*
- Create a Digital Marketplace for SME GovTech vendors
- Launch several annual problem-based challenge tenders

* Platforma națională de interoperabilitate

🌐 INTERNATIONAL BENCHMARK - ESTONIA

Adapt a rollout of e-Estonia and X-Road interoperability logic (3,000+ e-services, saving 1,400 labor years annually) for digital governmental services based on the once-only principle and digital identity.

Adjust for gradual rollout from regional to full-scale national interoperability.

🌐 e-estonia.com → X-Road interoperability services

Pillar 5 – Internationalization & regional corridors

According to our analysis, approx. 87% of Romanian IT revenue is concentrated in **5 major IT hubs**, with 60% of sales in our survey sample still depending on **outsourcing contracts**. Adapting Poland's PAIH model, a Romania Tech Export Platform and secondary city corridors can **turn fragmented local ecosystems into structured global partnerships** updating outsourcing/based models towards higher value-added activities.

→ THE SHIFT

Moving from fragmented local ecosystems to structured global partnerships and secondary city tech corridors; reducing the 87% geographic concentration risk.

☰ KEY ACTIONS

- Launch Romania's Tech Export Platform (targets: DACH, USA, France, Poland)
- Provide certification and market-entry vouchers for eligible companies
- Establish secondary city tech-corridors (e.g., Braşov-Sibiu, Cluj-Oradea) by government incentives
- Introduce performance-based cluster funding (exports, spin-offs, R&D)

🌐 INTERNATIONAL BENCHMARK · POLAND

Adapt the PFR Ventures & PAIH model, where financing, export services, and cluster building for high value-added activities and innovation operate as a single integrated system rather than siloed programs.

Adjust by starting gradually with targeted, tech-specific support models in major IT hubs, then extending it to tech-corridors.



<https://www.paih.gov.pl/en/> → Polish Investment and Trade Agency
<https://pfrventures.pl/en> → part of Polish Development Fund



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TRADITIO ET EXCELLENTIA



Romanian IT Market Study Evolution and Perspectives

— Cluj-Napoca, 2026 —

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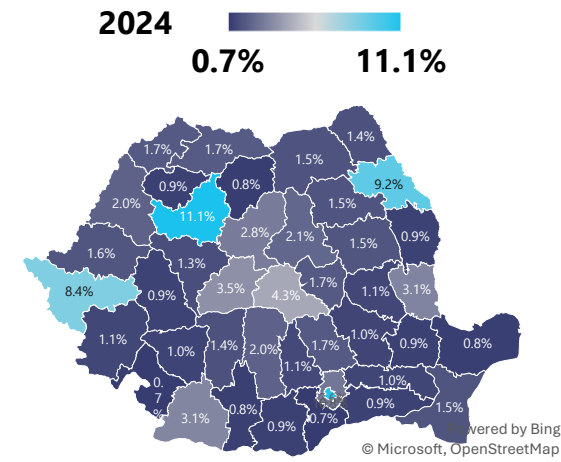
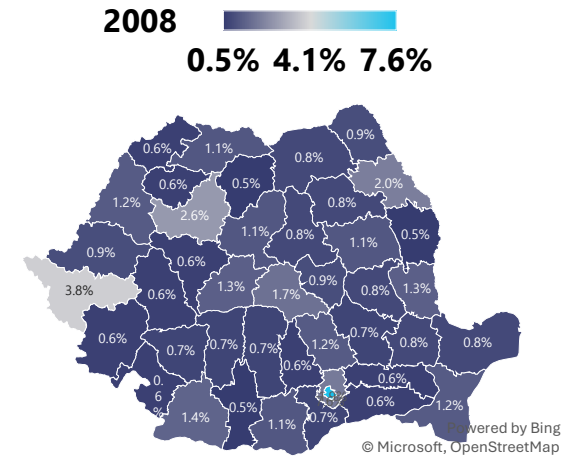
Romanian IT Market Study Appendix



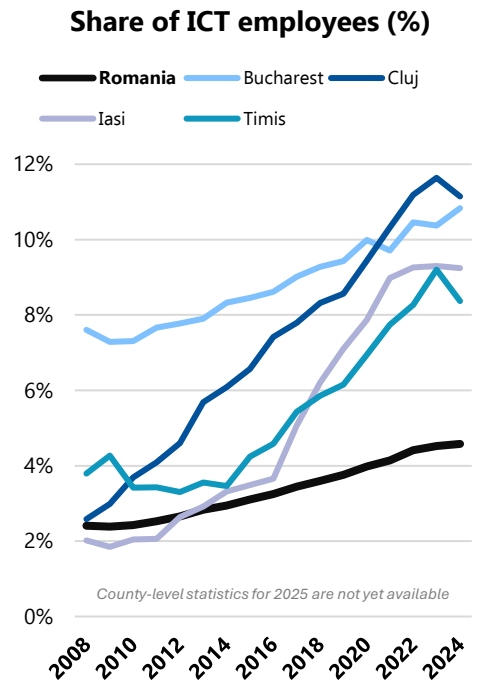
Share of employees in the ICT sector in Romania

The share of ICT workers is highest in Cluj, Timiș, and Iași counties, near the capital, Bucharest.

	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Romania	2.4%	2.4%	2.4%	2.5%	2.7%	2.8%	2.9%	3.1%	3.2%	3.4%	3.6%	3.8%	4.00%	4.1%	4.4%	4.5%	4.6%
Bucharest	7.6%	7.3%	7.3%	7.7%	7.8%	7.9%	8.3%	8.5%	8.6%	9.00%	9.3%	9.4%	10.0%	9.7%	10.5%	10.4%	10.8%
Alba	0.6%	0.6%	0.6%	0.6%	0.6%	0.6%	0.5%	0.5%	0.6%	0.6%	0.6%	0.6%	0.7%	0.8%	1.2%	1.3%	1.3%
Arad	0.9%	1.00%	1.1%	1.00%	0.9%	1.00%	0.9%	0.9%	0.9%	0.9%	0.9%	0.9%	1.00%	1.2%	1.3%	1.5%	1.6%
Arges	0.7%	0.6%	0.6%	0.6%	0.7%	0.8%	1.00%	1.1%	1.2%	1.6%	1.8%	1.9%	1.7%	1.8%	2.1%	1.9%	2.00%
Bacau	1.1%	1.1%	1.3%	1.2%	1.4%	1.4%	1.3%	1.3%	1.00%	1.1%	1.5%	1.5%	1.5%	1.7%	1.7%	1.7%	1.5%
Bihor	1.2%	1.00%	1.1%	0.9%	1.1%	1.2%	1.00%	1.2%	1.2%	1.4%	1.3%	1.3%	1.4%	1.8%	1.9%	2.00%	2.00%
Bistrita-Nasaud	0.5%	0.4%	0.6%	0.6%	0.7%	0.7%	0.6%	0.6%	0.5%	0.6%	0.6%	0.5%	0.4%	0.6%	0.6%	0.7%	0.8%
Botosani	0.9%	0.9%	1.00%	1.00%	1.1%	1.3%	1.1%	1.1%	1.1%	0.9%	0.9%	0.8%	1.1%	1.00%	1.3%	1.4%	
Braila	0.8%	0.7%	0.5%	0.4%	0.6%	0.8%	0.7%	0.8%	0.7%	1.00%	1.1%	1.00%	0.9%	1.1%	1.00%	1.1%	0.9%
Brasov	1.7%	2.1%	2.1%	2.2%	2.5%	2.6%	2.6%	3.1%	3.2%	3.3%	3.3%	3.6%	3.8%	3.9%	4.00%	4.3%	4.3%
Buzau	0.7%	0.8%	0.6%	0.6%	0.6%	0.7%	0.7%	0.9%	0.8%	0.9%	0.9%	0.8%	0.7%	0.9%	0.9%	0.8%	1.00%
Calarasi	0.6%	0.7%	0.6%	0.7%	0.7%	0.9%	0.7%	0.7%	1.00%	0.8%	0.8%	1.1%	0.8%	1.1%	0.9%	0.8%	0.9%
Caras-Severin	0.6%	0.7%	0.7%	0.7%	0.7%	0.9%	0.9%	0.9%	0.9%	0.9%	0.8%	0.7%	1.00%	1.00%	1.00%	1.00%	1.1%
Cluj	2.6%	3.00%	3.7%	4.1%	4.6%	5.7%	6.1%	6.6%	7.4%	7.8%	8.3%	8.6%	9.4%	10.3%	11.2%	11.6%	11.1%
Constanta	1.2%	1.2%	1.2%	1.2%	1.3%	1.7%	1.8%	1.8%	1.8%	1.9%	1.7%	1.6%	1.5%	1.6%	1.5%	1.5%	1.5%
Covasna	0.9%	0.9%	1.1%	0.9%	1.2%	1.2%	0.9%	0.9%	1.00%	1.2%	1.4%	1.5%	1.4%	1.6%	1.6%	1.6%	1.7%
Dambovit	0.6%	0.6%	0.7%	0.6%	0.9%	0.7%	0.6%	0.8%	0.8%	0.8%	0.9%	1.00%	1.00%	1.00%	1.00%	1.1%	1.1%
Doj	1.4%	1.5%	1.5%	1.5%	1.7%	1.7%	2.2%	2.6%	2.5%	2.6%	2.5%	2.7%	2.7%	2.9%	3.00%	3.1%	3.1%
Galati	1.3%	1.4%	1.5%	1.4%	1.7%	2.1%	2.2%	2.3%	2.3%	2.4%	2.5%	2.4%	2.4%	2.6%	2.9%	3.1%	3.1%
Giurgiu	0.7%	0.6%	0.6%	0.7%	0.6%	0.8%	0.7%	0.7%	0.6%	0.5%	0.5%	0.6%	0.7%	0.7%	0.6%	0.7%	0.7%
Gorj	0.7%	0.7%	0.7%	0.6%	0.7%	0.8%	0.6%	0.7%	0.7%	0.7%	0.7%	0.8%	0.8%	1.00%	0.9%	1.00%	1.00%
Harghita	0.8%	0.9%	1.00%	1.2%	1.4%	1.6%	1.6%	1.9%	2.1%	1.9%	1.7%	1.8%	1.7%	1.8%	1.8%	1.7%	2.1%
Hunedoara	0.6%	0.8%	0.7%	0.7%	0.7%	0.7%	0.6%	0.6%	0.7%	0.7%	0.7%	0.7%	0.7%	0.9%	0.9%	0.9%	0.9%
Ialomita	0.6%	0.5%	0.5%	0.9%	1.00%	0.8%	0.8%	0.8%	0.7%	0.9%	0.9%	0.9%	1.00%	0.8%	0.9%	0.9%	1.00%
Iasi	2.00%	1.8%	2.00%	2.1%	2.6%	2.9%	3.3%	3.5%	3.7%	5.1%	6.2%	7.1%	7.9%	9.00%	9.3%	9.3%	9.2%
Ilfov	1.9%	1.7%	1.6%	2.1%	2.2%	3.2%	3.3%	3.5%	3.6%	3.3%	3.00%	3.1%	3.00%	2.6%	2.6%	2.7%	2.6%
Maramures	1.1%	0.8%	0.9%	0.8%	1.00%	1.00%	1.00%	1.1%	1.2%	1.1%	1.3%	1.3%	1.3%	1.5%	1.6%	1.6%	1.7%
Mehedinti	0.6%	0.6%	0.6%	0.7%	0.7%	0.6%	0.6%	0.5%	0.5%	0.5%	0.5%	0.5%	0.3%	0.6%	0.6%	0.6%	0.7%
Mures	1.1%	1.2%	1.2%	1.1%	1.3%	1.6%	1.5%	1.8%	1.9%	2.1%	2.1%	2.2%	2.2%	2.5%	2.6%	2.7%	2.8%
Neamt	0.8%	1.00%	1.00%	1.1%	1.3%	1.2%	1.1%	1.2%	1.4%	1.3%	1.2%	1.3%	1.4%	1.4%	1.4%	1.4%	1.5%
Olt	0.5%	0.5%	0.7%	0.5%	0.6%	0.6%	0.5%	0.5%	0.5%	0.6%	0.5%	0.7%	0.6%	0.7%	0.7%	0.7%	0.8%
Prahova	1.2%	1.1%	1.3%	1.3%	1.6%	1.7%	1.7%	1.6%	1.5%	1.4%	1.3%	1.5%	1.5%	1.6%	1.7%	1.8%	1.7%
Salaj	0.6%	0.5%	0.6%	0.7%	0.7%	0.7%	0.7%	0.7%	0.6%	0.6%	0.6%	0.7%	0.7%	0.8%	0.8%	0.8%	0.9%
Satu Mare	0.6%	0.4%	0.5%	0.6%	0.7%	0.9%	0.6%	0.6%	0.7%	0.6%	0.7%	0.7%	1.1%	1.4%	1.4%	1.5%	1.7%
Sibiu	1.3%	1.1%	1.1%	1.2%	1.6%	1.5%	1.7%	1.7%	1.9%	1.9%	2.1%	2.4%	2.7%	3.2%	3.7%	3.6%	3.5%
Suceava	0.8%	0.7%	0.7%	0.8%	1.00%	1.2%	1.2%	1.4%	1.2%	1.3%	1.3%	1.1%	1.4%	1.3%	1.3%	1.5%	
Teleorman	1.1%	0.9%	0.9%	1.00%	1.1%	0.9%	0.7%	0.7%	0.8%	0.6%	0.5%	0.7%	0.6%	0.9%	0.9%	0.9%	0.9%
Timis	3.8%	4.3%	3.4%	3.4%	3.3%	3.6%	3.5%	4.2%	4.6%	5.4%	5.9%	6.2%	6.9%	7.7%	8.3%	9.2%	8.4%
Tulcea	0.8%	0.5%	0.7%	0.7%	0.8%	0.8%	0.9%	0.7%	0.8%	0.7%	0.7%	0.7%	0.8%	0.7%	0.7%	0.7%	0.8%
Valcea	0.7%	0.9%	0.9%	0.8%	1.1%	1.3%	1.2%	1.2%	1.2%	1.3%	1.2%	1.3%	1.1%	1.2%	1.2%	1.3%	1.4%
Vaslui	0.5%	0.4%	0.4%	0.3%	0.6%	0.7%	0.7%	0.6%	0.6%	0.6%	0.7%	0.7%	0.7%	0.9%	0.9%	0.9%	0.9%
Vrancea	0.8%	0.6%	0.5%	0.6%	0.8%	1.00%	0.8%	0.7%	0.8%	0.8%	0.7%	0.9%	0.9%	1.00%	1.00%	1.00%	1.1%



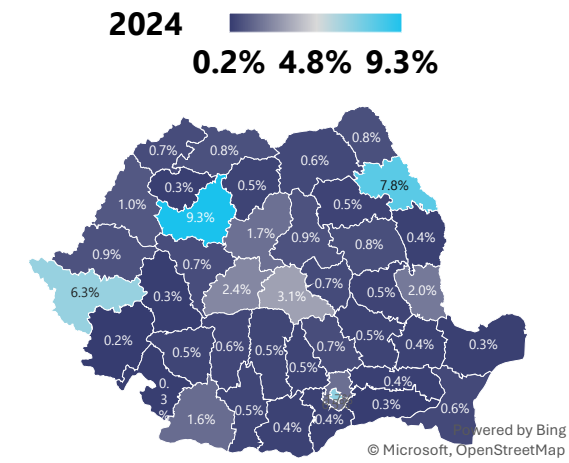
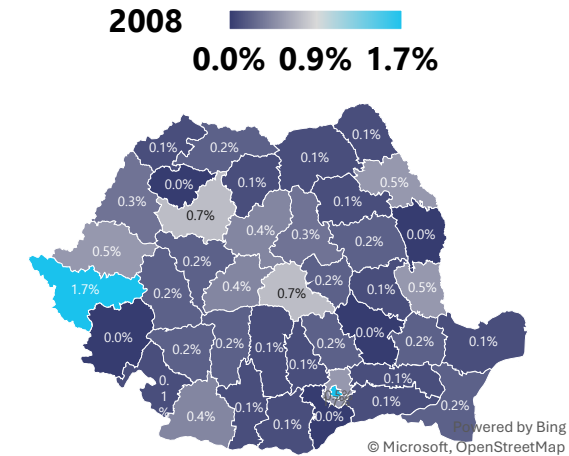
Although there have been differences between counties in the past, the **share of ICT workers in Cluj, Iasi and Timis counties** has increased dramatically.



Share of employees in the IT sector in Romania

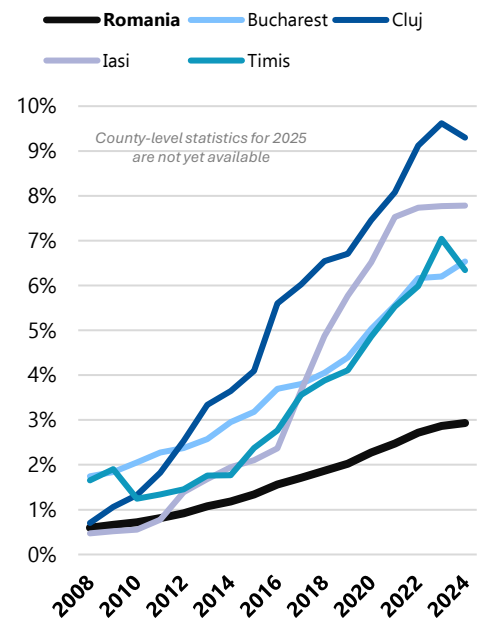
Focusing on the core IT sector, the dominance of the capital and the three counties (Cluj, Timis, and Iasi) is more visible. Cluj has significantly surpassed all of them.

	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Romania	0.6%	0.7%	0.7%	0.8%	0.9%	1.1%	1.2%	1.3%	1.6%	1.7%	1.9%	2.0%	2.3%	2.5%	2.7%	2.9%	2.9%
Bucharest	1.7%	1.8%	2.1%	2.3%	2.4%	2.6%	2.9%	3.2%	3.7%	3.8%	4.1%	4.4%	5.0%	5.6%	6.2%	6.2%	6.5%
Alba	0.2%	0.2%	0.1%	0.2%	0.2%	0.1%	0.1%	0.2%	0.2%	0.2%	0.2%	0.2%	0.3%	0.3%	0.5%	0.6%	0.7%
Arad	0.5%	0.5%	0.5%	0.5%	0.4%	0.5%	0.4%	0.5%	0.4%	0.4%	0.4%	0.4%	0.5%	0.5%	0.5%	0.8%	0.9%
Arges	0.1%	0.2%	0.2%	0.2%	0.2%	0.2%	0.2%	0.3%	0.3%	0.6%	0.7%	0.6%	0.5%	0.4%	0.4%	0.5%	0.5%
Bacau	0.2%	0.2%	0.2%	0.1%	0.1%	0.1%	0.1%	0.2%	0.1%	0.2%	0.5%	0.5%	0.6%	0.7%	0.8%	0.7%	0.8%
Bihor	0.3%	0.3%	0.4%	0.4%	0.5%	0.6%	0.5%	0.7%	0.8%	0.8%	0.7%	0.7%	0.8%	0.8%	0.9%	1.00%	1.0%
Bistrita-Nasaud	0.1%	0.0%	0.1%	0.1%	0.1%	0.2%	0.1%	0.2%	0.1%	0.1%	0.2%	0.2%	0.2%	0.3%	0.2%	0.4%	0.5%
Botosani	0.1%	0.1%	0.1%	0.1%	0.2%	0.3%	0.1%	0.3%	0.3%	0.3%	0.3%	0.3%	0.3%	0.4%	0.4%	0.7%	0.8%
Braila	0.2%	0.2%	0.1%	0.1%	0.2%	0.3%	0.3%	0.2%	0.3%	0.6%	0.7%	0.6%	0.6%	0.5%	0.5%	0.6%	0.4%
Brasov	0.7%	0.9%	1.0%	1.1%	1.4%	1.4%	1.7%	2.0%	2.0%	2.1%	2.2%	2.4%	2.5%	2.6%	2.8%	3.2%	3.1%
Buzau	0.0%	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%	0.2%	0.2%	0.2%	0.3%	0.2%	0.5%
Calarasi	0.1%	0.1%	0.1%	0.1%	0.0%	0.2%	0.1%	0.1%	0.1%	0.1%	0.1%	0.2%	0.3%	0.2%	0.1%	0.1%	0.3%
Caras-Severin	0.0%	0.0%	0.1%	0.1%	0.0%	0.1%	0.0%	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%	0.2%	0.2%
Cluj	0.7%	1.1%	1.3%	1.8%	2.5%	3.3%	3.6%	4.1%	5.6%	6.0%	6.5%	6.7%	7.5%	8.1%	9.1%	9.6%	9.3%
Constanta	0.2%	0.2%	0.2%	0.2%	0.2%	0.6%	0.8%	0.7%	0.7%	0.8%	0.7%	0.7%	0.6%	0.6%	0.5%	0.6%	0.6%
Covasna	0.2%	0.3%	0.2%	0.1%	0.3%	0.2%	0.2%	0.3%	0.3%	0.3%	0.5%	0.5%	0.6%	0.6%	0.6%	0.5%	0.7%
Dambovita	0.1%	0.1%	0.1%	0.1%	0.1%	0.2%	0.2%	0.2%	0.2%	0.3%	0.3%	0.4%	0.4%	0.4%	0.4%	0.4%	0.5%
Dolj	0.4%	0.5%	0.5%	0.6%	0.7%	0.7%	1.2%	1.4%	1.5%	1.4%	1.4%	1.4%	1.5%	1.4%	1.5%	1.5%	1.6%
Galati	0.5%	0.5%	0.6%	0.7%	0.9%	1.2%	1.2%	1.5%	1.5%	1.5%	1.5%	1.4%	1.5%	1.5%	1.7%	1.9%	2.0%
Giurgiu	0.0%	0.0%	0.1%	0.1%	0.0%	0.3%	0.3%	0.3%	0.3%	0.1%	0.1%	0.2%	0.3%	0.3%	0.3%	0.4%	0.4%
Gorj	0.2%	0.2%	0.2%	0.2%	0.2%	0.2%	0.2%	0.3%	0.3%	0.3%	0.4%	0.4%	0.4%	0.5%	0.5%	0.5%	0.5%
Harghita	0.3%	0.3%	0.3%	0.3%	0.2%	0.4%	0.3%	0.6%	0.6%	0.6%	0.5%	0.6%	0.6%	0.6%	0.6%	0.6%	0.9%
Hunedoara	0.2%	0.3%	0.4%	0.3%	0.3%	0.3%	0.2%	0.2%	0.2%	0.2%	0.2%	0.2%	0.2%	0.3%	0.2%	0.2%	0.3%
Ialomita	0.1%	0.1%	0.0%	0.1%	0.1%	0.1%	0.0%	0.1%	0.0%	0.1%	0.1%	0.2%	0.2%	0.1%	0.2%	0.2%	0.4%
Iasi	0.5%	0.5%	0.6%	0.8%	1.4%	1.7%	1.9%	2.1%	2.4%	3.7%	4.9%	5.8%	6.5%	7.5%	7.7%	7.8%	7.8%
Ilfov	0.5%	0.5%	0.6%	1.0%	1.2%	1.4%	1.6%	1.5%	1.7%	2.0%	1.9%	2.0%	2.0%	1.6%	1.7%	1.7%	1.7%
Maramures	0.2%	0.1%	0.2%	0.2%	0.3%	0.3%	0.4%	0.4%	0.4%	0.4%	0.4%	0.6%	0.6%	0.6%	0.7%	0.7%	0.8%
Mehedinti	0.1%	0.1%	0.1%	0.1%	0.1%	0.2%	0.2%	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%	0.2%	0.3%
Mures	0.4%	0.6%	0.5%	0.5%	0.6%	0.7%	0.8%	0.9%	1.1%	1.1%	1.1%	1.2%	1.3%	1.4%	1.6%	1.7%	1.7%
Neamt	0.1%	0.1%	0.2%	0.3%	0.4%	0.4%	0.3%	0.4%	0.3%	0.4%	0.4%	0.4%	0.5%	0.4%	0.5%	0.4%	0.5%
Olt	0.1%	0.1%	0.2%	0.1%	0.1%	0.2%	0.1%	0.2%	0.2%	0.3%	0.3%	0.4%	0.4%	0.4%	0.3%	0.4%	0.5%
Prahova	0.2%	0.2%	0.3%	0.3%	0.4%	0.4%	0.5%	0.5%	0.3%	0.3%	0.3%	0.5%	0.4%	0.5%	0.6%	0.6%	0.7%
Salaj	0.0%	0.0%	0.1%	0.1%	0.0%	0.0%	0.1%	0.1%	0.1%	0.2%	0.2%	0.2%	0.3%	0.2%	0.2%	0.2%	0.3%
Satu Mare	0.1%	0.1%	0.2%	0.2%	0.3%	0.4%	0.2%	0.3%	0.4%	0.4%	0.4%	0.4%	0.4%	0.5%	0.5%	0.5%	0.7%
Sibiu	0.4%	0.4%	0.5%	0.6%	0.7%	0.8%	0.9%	0.9%	1.00%	1.1%	1.4%	1.4%	1.7%	2.1%	2.5%	2.5%	2.4%
Suceava	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%	0.3%	0.2%	0.2%	0.3%	0.3%	0.4%	0.3%	0.4%	0.5%	0.6%
Teleorman	0.1%	0.1%	0.1%	0.1%	0.2%	0.1%	0.1%	0.1%	0.1%	0.2%	0.2%	0.4%	0.3%	0.3%	0.3%	0.4%	0.4%
Timis	1.7%	1.9%	1.2%	1.3%	1.5%	1.8%	1.8%	2.4%	2.8%	3.6%	3.9%	4.1%	4.9%	5.5%	6.0%	7.0%	6.3%
Tulcea	0.1%	0.1%	0.2%	0.1%	0.1%	0.2%	0.2%	0.1%	0.1%	0.2%	0.2%	0.3%	0.4%	0.3%	0.2%	0.2%	0.3%
Valcea	0.2%	0.3%	0.3%	0.3%	0.3%	0.5%	0.4%	0.3%	0.4%	0.5%	0.4%	0.4%	0.4%	0.4%	0.4%	0.4%	0.6%
Vaslui	0.0%	0.0%	0.1%	0.0%	0.2%	0.2%	0.3%	0.2%	0.1%	0.1%	0.2%	0.2%	0.2%	0.3%	0.3%	0.3%	0.4%
Vrancea	0.1%	0.0%	0.0%	0.0%	0.1%	0.0%	0.1%	0.1%	0.2%	0.1%	0.1%	0.2%	0.3%	0.4%	0.3%	0.3%	0.5%



The rise of IT has helped some (already more developed) counties to develop further. However, **if the demand for higher value-added IT activities declines, then heavily IT-based counties will have to turn to new sources of growth.**

Share of IT employees (%)



Survey research

The questions of the survey research are enlisted below.

DEMOGRAPHICS

1. The global size of your company: How many employees does your company have, in total, in the world?
 - Not applicable – my company is a 100% Romanian company
 - 1 to 250
 - 251 to 1,000
 - 1,001 to 5,000
 - 5,001 to 10,000
 - 10,001 to 15,000
 - More than 15,000
2. The local size of your company: How many employees (including contractual collaborators) does your company have in Romania?
 - 1 to 10
 - 11 to 50
 - 51 to 250
 - 250 to 500
 - 500 to 1,000
 - More than 1,000
3. In which Romanian city is your **company/main business** unit located?
4. Which country is your **majority shareholder** from?

Survey research

The questions of the survey research are enlisted below.

TYPE OF ACTIVITY

5. What percentage of your **annual revenue** do you derive from the following types of **activity**? (0-100%)
 - Research & Product Development: we develop our own products; our company owns the Intellectual Property on the products and solutions we build
 - Outsourcing & Services: we offer IT services according to our customers' specifications, the Intellectual Property is transferred and belongs to our customers
6. What percentage of your **annual revenue** is based on the following type of **IT projects**? (0-100%)
 - Basic IT Support (e.g., Hardware setup, helpdesk, routine system administration)
 - Outsourced Specialized Tasks & Maintenance (e.g., Testing/QA services, legacy system maintenance)
 - Custom Software Development (e.g., Client-specific solutions, customizable and flexible design)
 - Advanced Development & Integration (e.g., Complex system architectures, high-level software engineering)
 - Own product development (e.g., Own product development in digital transformation, AI/ML)
 - Others
7. How many **work hours** are carried out **remotely** (from home office) on average per employee on a typical 40-hour working week? (Indicate the no. of hours / 40 hours)
8. Please mark maximum 3 departments that work the most remotely.
 - Not applicable (e.g., small firms)
 - Core IT: Software or Hardware Development and Engineering
 - Core IT: Operations, Network, Infrastructure, DevOps, Security, Tech support, Hardware & Software maintenance
 - Core IT: Research, Software and Product Architecture, Solution Design, Technical Strategy
 - Core IT: Quality Assurance, Testing, Optimization
 - Core IT: Design, User Experience, User Interface, Graphic, Video, Visual Effects, Editing
 - Project Management, Product Management or Business Analysis
 - Marketing, Sales, Customer Support, Account Management
 - Top Executive Management (C-level, Director-level, Division or Department management)
 - Support functions: Human Resources, Finance, Office management, Administration, etc.
 - Other roles, none of the above

Survey research

The questions of the survey research are enlisted below.

EMPLOYEES

9. What is the approximate **composition** of your employees in terms of **age**? (0-100%)

- Under 18
- 18-24
- 25-34
- 35-44
- 45-54
- 55 and above

10. What is the approximate **composition** of your employees in terms of **gender**? (0-100%)

- Male
- Female
- Do not want to declare

11. What is the approximate **composition** of your employees in terms of **citizenship**? (0-100%)

- Romanian
- Other EU citizen
- Outside EU

12. What is the approximate **composition** of your employees in terms of their **highest education level**? (0-100%)

- Below high school
- High school
- University: Bachelor's degree
- University: Master's degree
- Doctoral / postdoctoral level

Survey research

The questions of the survey research are enlisted below.

EMPLOYEES

13. What is the approximate **composition** of your employees with **university degrees**? (0-100%)

- Diploma in computer sciences
- Diploma in other sciences

14.1. How did the **number of employees** in your company (Romanian unit) evolve **during 2024**? Indicate the **+/- percentage change** in **total** number of employees.

14.2. How did the **number of employees** in your company (Romanian unit) evolve **during 2024**? Indicate the **+/- percentage change** in the number of employees **on bench**.

15.1. What are your **expectations** in terms of the evolution of the **number of employees** in your company (Romanian unit) in **2025**? Indicate the **+/- percentage change** in **total** number of employees.

15.2. What are your **expectations** in terms of the evolution of the **number of employees** in your company (Romanian unit) in **2025**? Indicate the **+/- percentage change** in the number of employees **on bench**.

16. How have the **average gross wages** of **individual employees** been modified in your company **since January 1, 2025**?

- Less than -12.5%
- [-12.5%, -7.5%)
- [-7.5%, -2.5%)
- [-2.5%, +2.5%)
- [+2.5%, +7.5%)
- [+7.5%, +12.5%)
- +12.5% or more

Survey research

The questions of the survey research are enlisted below.

EMPLOYEES

17.1. To what extent are the following **hard/technical skills** needed when employing new **core-IT personnel** in your company?

- Software development (incl. programming, scripting, coding)
- Using specialized software (e.g., cloud platforms, DevOps tools)
- Database management and optimization
- Data analysis and machine learning
- Cybersecurity and risk management
- Use of spreadsheets for data processing
- Use of word-processing tools
- Navigating and utilizing internet for work
- Working with digital tools and devices (e.g., remote collaboration tools, hardware integration)
- Cloud computing and infrastructure management
- API design and integration

17.2. To what extent are the following **soft skills** needed when employing new **core-IT personnel** in your company?

- Ability to learn and develop new technical skills
- Ability to adapt to new digital tools and technologies
- Continuous improvement mindset for work methodologies
- Problem-solving and critical thinking
- Creativity and innovation in product/service development
- Effective communication and presentation skills
- Collaboration and teamwork
- Mentoring, coaching, or training others
- Providing strategic advice and consulting
- Leadership and management skills

Survey research

The questions of the survey research are enlisted below.

MARKET INTERNATIONALIZATION

18. What is the approximate **composition** of your current **client base**? (0-100%)

- Romanian
- Europe (outside Romania)
- North America
- Central and South America
- Asia
- Other

19.1. In which country are your **most important competitors** located? Please name the most relevant country in Europe.

19.2. In which country are your **most important competitors** located? Please name the most relevant country globally (outside Europe), if applicable.

20. To what extent have you experienced or are you aware of the following **barriers** in the **internationalization process** of IT companies?

- Lack of information about external markets
- Market entry and competition barriers
- Lack of international visibility
- Regulatory barriers
- Industry/sector standards and certifications
- Internal economic and financial barriers
- Difficulty in getting government funds
- Technological and infrastructural barriers
- Managerial and strategic restrictions
- Organizational barriers
- Lack of human resources
- Communication barriers
- Cultural barriers
- Political interference

Survey research

The questions of the survey research are enlisted below.

MARKET INTERNATIONALIZATION

21. To what extent have you experienced (or are you aware of) the following **opportunities** in the **internationalization process** of IT companies?

- Strategic partnerships with other companies
- Support from the headquarters/top management
- Romanian government support for expansion
- EU support or other international support
- Beneficial regulations and taxation
- Talent acquisition
- Low competition

AI USE

22. What % of employees are **currently using** in their daily tasks **AI solutions** subscribed to / provided by your company? (0-100%)

23. What % of employees do you predict **will use AI solutions** subscribed to / provided by your company in their daily tasks **by the end of 2025?** (0-100%)

24. To what extent are the following **departments/activities** in your company using **AI solutions?** *Only for larger firms (50+ employees) with multiple departments*

- Core IT: Software or Hardware Development and Engineering
- Core IT: Operations, Network, Infrastructure, DevOps, Security, Tech support, Maintenance
- Core IT: Research, Software and Product Architecture, Solution Design, Technical Strategy
- Core IT: Quality Assurance, Testing, Optimization
- Core IT: Design, UX/UI, Graphic, Video, Visual Effects, Editing
- Project Management, Product Management or Business Analysis
- Marketing, Sales, Customer Support, Account Management
- Management (C-level, Director-level, Division or Department management)
- Support functions: HR, Finance, Office management, Administration, etc.
- Other roles, none of the above

Survey research

The questions of the survey research are enlisted below.

AI USE

25. What % of core (IT-related) employee jobs were **replaced by AI solutions in 2024?** (0-100%)

26.1. What % of core (IT-related) employee jobs in your company do you predict to be **replaced by AI solutions** in the future? (0-100% **in 2025**)

26.2. What % of core (IT-related) employee jobs in your company do you predict to be **replaced by AI solutions** in the future? (0-100% **in the following 3 years thereafter**)

27. To what extent do you agree that **AI solutions** are **beneficial** for the activity of your company in the following domains?

- Enhance the features, functions, and performance of our IT products
- Create new IT products & services
- Pursue new markets
- Optimize internal business processes
- Optimize external processes like marketing and sales
- Free up workers to be more creative by automating tasks
- Make better decisions
- Capture and apply knowledge
- Reduce headcount through automation

28. To what extent do you agree that the following factors represent a **barrier** to the **adoption of AI solutions** in your company?

- It's hard to integrate AI with existing systems
- AI technologies and expertise are too expensive
- We can't get enough people with expertise in AI
- AI technologies are immature
- AI technologies have been oversold ("hyped") in the marketplace
- Managers don't fully understand AI technologies and how they work
- Lack of clear AI regulations and standards
- Lack of specific data infrastructure for AI

Survey research

The questions of the survey research are enlisted below.

AI USE

29.1. To what extent have you used the following **internal activities** to support **innovative projects** in your company (e.g., adopting AI-based solutions)?

- Screening of employee ideas for innovation
- Internal incentives to stimulate innovation
- Regular employee rotation between functions
- A budget for the innovation process
- Information sharing between functions
- Internal electronic platforms
- Innovation groups to coordinate innovation activities

29.2. To what extent have you used the following **external activities** to support **innovative projects** in your company (e.g., adopting AI-based solutions)?

- Informal knowledge exchange meetings
- Professional conferences and meetings
- Use of online platforms
- Formal legal agreements
- Exclusivity practices and technology agreements
- Screening and attracting innovative ideas, research projects and start-ups

30. To what extent have you used **national and international funds** to support **innovative projects** in your company in the last 3 years (e.g., adopting AI-based solutions)?

- National
- International

Survey research

The questions of the survey research are enlisted below.

AI USE

31. To what extent do you **foster cooperation** with the following **external entities** in **innovative projects** (e.g., AI-based solutions)?

- Universities
- Consortiums (of academic and non-academic institutions)
- Consultants & advisors
- Companies in the IT industry
- Companies in other industries
- Scientific labs
- Incubators / accelerators
- IT clusters

GENDER DIVERSITY

32. Does your company have a formal policy for **reintegrating** employees **after maternity leave**?

- Yes, we have a structured policy
- We handle it on a case-by-case basis
- No formal policy exists

33. What kind of **flexibility** is offered to employees **returning from maternity leave**? Please mark all that apply.

- Part-time options
- Remote or hybrid work
- Gradual reintegration (reduced hours at first)
- Flexible working hours
- No specific flexibility provided

Survey research

The questions of the survey research are enlisted below.

GENDER DIVERSITY

34. How does your company **ensure** that returning employees **do not face career setbacks after maternity leave**? Please mark all that apply.

- Regular career development discussions before and after leave
- Guaranteed return to the same position or an equivalent role
- Promotion opportunities remain unaffected
- No specific measures in place

ENVIRONMENTAL SUSTAINABILITY

35. To what extent do you apply the following **IT-related green considerations** at the level of your company?

- Organizational considerations (e.g., projects and strategies for environmental sustainability in IT; corporate environmental strategy; specific Green IT policies)
- Technological considerations (e.g., eco- efficiency of computer systems and data centers; energy-efficient computing)
- Economic considerations (e.g., cost reduction through energy-efficient equipment; cost savings by green computing; power management, cooling technology, e-waste disposal)
- Environmental considerations (e.g., disposal of IT in a sustainable way; data centers powered by renewable energy; alternative energy sources)
- Social considerations (e.g., corporate responsibility; incorporating social concerns in IT procurement decisions)
- Marketing considerations (e.g., green IT consulting; communication of green aspects of products to clients)

36. What percentage of your **sales in 2024** was derived from **IT products focusing on green considerations** (e.g., IT products or platforms related to renewable energy, sustainability reporting IT tools, IT tools for calculation of scope 1, 2 and 3 emissions, circular economy, eco-friendly transport solutions, e-waste recycling, vertical farming etc.)? (0-100%)