



asociația patronală a industriei de
software și servicii

Romania, the Digital Hub of Europe

Teodor Blidăruș, President

Agenda

- About ANIS
- Romanian software and IT services industry



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About ANIS

About ANIS – who we are

- **19 years of projects.** Set up in 1998, ANIS represents the interests of Romanian based tech companies and supports the growth of the local industry.
- **+2.5 Bn EUR in turnover.** Cumulated yearly revenues of our member companies place ANIS as a key stakeholder within our sector.
- **~130 members.** ANIS brings together Romanian and foreign capital companies, small, medium or corporations, located in all significant IT centers in the country.
- **~32.000 employees.** ANIS members generate a significant number of highly qualified jobs.

About ANIS – what we do

- **Mission: support the growth of the Romanian tech industry**
- **Vision: Services and products that are competitive on the global market**

Strategic priorities:

- Promoting Romania as a high value added outsourcing destination
- Supporting companies in developing new business models, including own IP product development
- Growing the local market and tech consumption, by promoting the use of technology in the SMB segment



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Romanian Software and IT Services Industry

Romanian Software and IT Services Industry

Industry report with most important “demographics” for our industry, developed together with PAC – www.itstudy.anis.ro

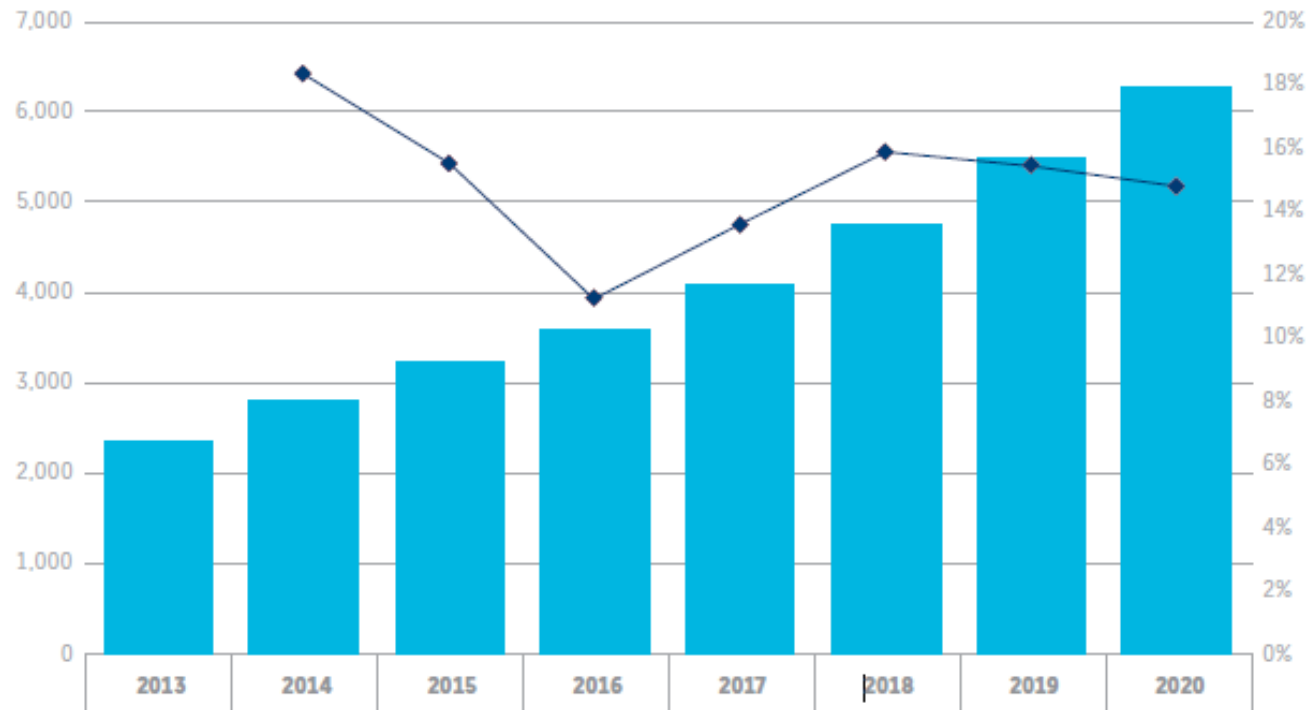
- **Sector turnover:** +4 Bn EUR (est 2017)
- Compound growth rate for the last 3 yrs– 15 %
- Projected growth rate for the next 3 yrs : 15,4%



Sursa: “Software and IT Services in Romania”, ANIS-PAC, May 2017

Turnover and growth rate

Total Romanian SITS Industry



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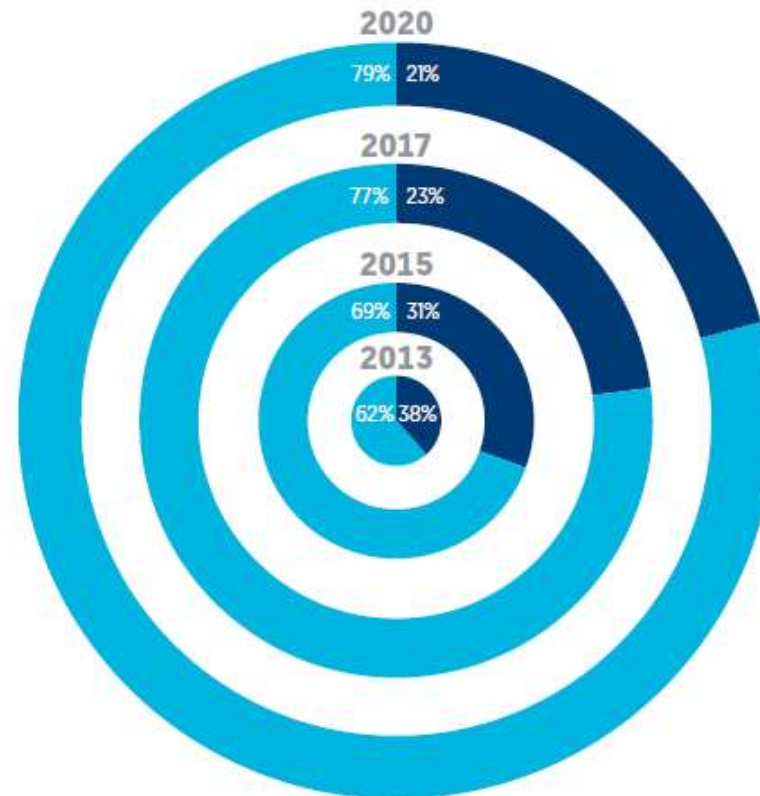
Romanian Software and IT Services Industry

- **Exports:** 3,15 Bn EUR (est. 2017)
- Estimated growth 2017: +18,2%
- CAGR for the next 3 yrs: 16,7%

- **Domestic market:** ~1 Bn EUR
- 2016: 5,6% downsizing (*previous estimation of 4,5% growth*)
- CAGR for the next 3 yrs: 10%

Domestic Market vs. Export

	Foreign Market	Domestic Market
2013	1,460	910
2015	2,250	990
2017	3,155	940
2020	4,340	1,140



Romanian Software and IT Services Industry

Domestic Market

- Major buyers: Industry (39%), finance (20%), services and consumers (16%)
- Most important growth rates: finance (26%), services and consumers, telecom, industry, retail
- Services 64% vs. Product 36%

Growth Rates / Segments / Domestic

IT Services Market 2013-2020:
Growth Rates by Segment
Romanian Customers Revenue



Romanian Software and IT Services Industry

Exports

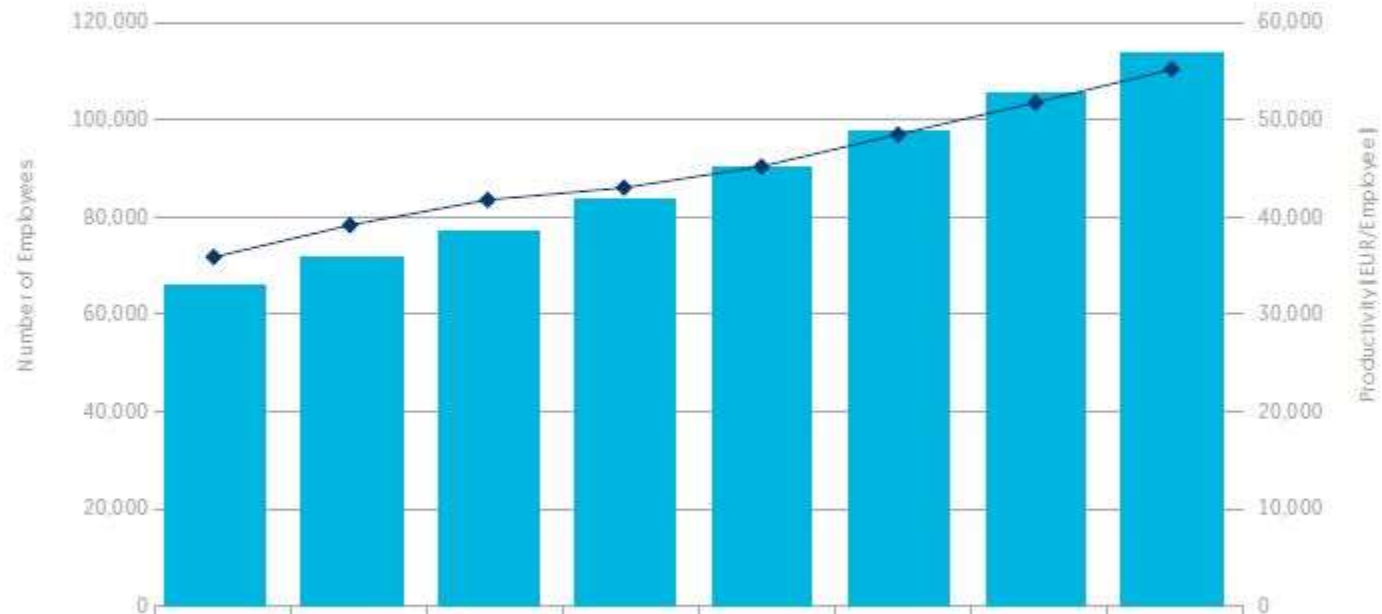
- Major buyers: public administration (22%), industry (20%), finance (15%)
- Most significant growth rates: retail, services and consumers, industry, finance
- Services 88% vs. Product 12%

Growth Rates / Segments / Export

IT Services Market 2013-2020:
Growth Rates by Segment
Foreign Customers Revenue



Total Romanian SITS Industry Employees and Productivity



	2013	2014	2015	2016	2017	2018	2019	2020
Number of Employees	65,930	71,590	77,435	83,675	90,380	97,695	105,650	113,850
Productivity (EUR/Employee)	35,947	39,181	41,842	43,083	45,309	48,570	51,869	55,248

Options for growth

1. **Education** – adapting for answering the industry needs (no. of graduates and skills)
2. **Supporting innovation and entrepreneurship** – for developing products and high value added services
3. **Financing IT incubators** – in at least 5 significant tech clusters and supporting companies in accessing the global market
4. **Domestic market** – growing tech consumption, especially for SMB segment

Thank you !

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