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Romania Information Technology Report Q2 2016

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Abstracts

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BMI View: After a dip in IT market performance in Romania in 2015 we expect the market to exhibit stronger growth from 2016 to 2020. Device and solution penetration remains some way below the European average in Romania, and as the economy gathers momentum we believe vendors will be able to target relatively strong growth from convergence trends. The increasingly affluence of the middle class in Romania is highlighted, and we believe of greatest significance to personal device vendors, ie tablets, notebooks and hybrids. Meanwhile, the enterprise application market has considerable potential in ERP and CRM, and lower cost cloud providers could make gains in market share by tapping this underpenetrated opportunity. For the Romanian IT market as a whole we forecast a CAGR of 7.2% over 2016-2020 to almost RON7.7bn.

Latest Updates & Industry Developments

Hardware Sales: from RON3.1bn in 2016 to RON3.8bn in 2020, corresponding to a CAGR of 5.3%. The market turned down in 2015 as economic downside exacerbated the product cycle, but we expect stronger medium term performance as the middle class becomes increasingly affluent.

Software Sales: from RON1.3bn in 2016 to RON1.8bn in 2020, a CAGR of 8.6%. Relatively low penetration of enterprise applications opens the door to strong catch-up growth as cloud delivered ERP and CRM solutions deepen the market.

IT Services: from RON1.5bn in 2016 to RON2.1bn in 2020, a CAGR of 9.7%. Cloud computing and outsourcing adoption by local enterprises will drive expansion of the services segment, supplementing traditional revenue sources

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such as consulting and systems integration.

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Contents

BMI Industry View
Latest Updates & Industry Developments
SWOT
Industry Forecast
Latest Updates
Structural Trends
  Table: IT Industry - Historical Data And Forecasts (Romania 2013-2020)
Industry Risk/Reward Index
  Table: IT RRI Score Breakdown By Region, Q216
  Table: Europe IT Risk/Reward Index, Q2 2016
Market Overview
Recent Developments
Hardware
Software
  Table: Romania Enterprise Application Penetration By Vertical* (%), 2015
Cloud Computing
IT Services
  Table: Outsourcing Centres In Romania
Industry Trends And Developments
Regulatory Developments
  Table: IT Regulatory Authorities
Regulatory News
Competitive Landscape
International Companies
  Table: Oracle
  Table: SAP
Local Companies
  Table: Evolio
  Table: SIVECO
  Table: SOFTWIN Group
Regional Overview
Demographic Forecast
  Table: Population Headline Indicators (Romania 1990-2025)
  Table: Key Population Ratios (Romania 1990-2025)
  Table: Urban/Rural Population & Life Expectancy (Romania 1990-2025)
  Table: Population By Age Group (Romania 1990-2025)
  Table: Population By Age Group % (Romania 1990-2025)

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Methodology
Industry Forecast Methodology
Sources
Risk/Reward Index Methodology
Table: IT Risk/Reward Index Indicators
Table: Weighting Of Components

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