

Romania Information Technology Report Q3 2016

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Abstracts

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BMI View: Romania is one of the lower income markets in Central and Eastern Europe, with device and solution penetration rates below much of the rest of the region. This growth potential is expected to be unlocked over the medium term as the economic environment becomes more supportive after a drag in 2014-2015. Our household income forecast shows an expanding and increasingly affluent middle class, which is positive for device spending, as well as wider economic sentiment. 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 RON3.05bn in 2016 to RON3.75bn in 2020, corresponding to a CAGR of 5.3%. Rising household incomes are forecast, which should support higher value sales of retail PCs, but there is uncertainty due to form factor competition.

Software Sales: From RON1.32bn in 2016 to RON1.83bn in 2020, a CAGR of 8.6%. Relatively low penetration of enterprise applications represents an opportunity for vendors, and growth could be particularly strong as cloud delivered ERP and CRM solutions deepen the market.

IT Services: From RON1.46bn in 2016 to RON2.11bn 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

such as consulting and systems integration.

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