

# Software and IT Services in Romania

Current Situation and Outlook in a Local and Global Environment

# 2018

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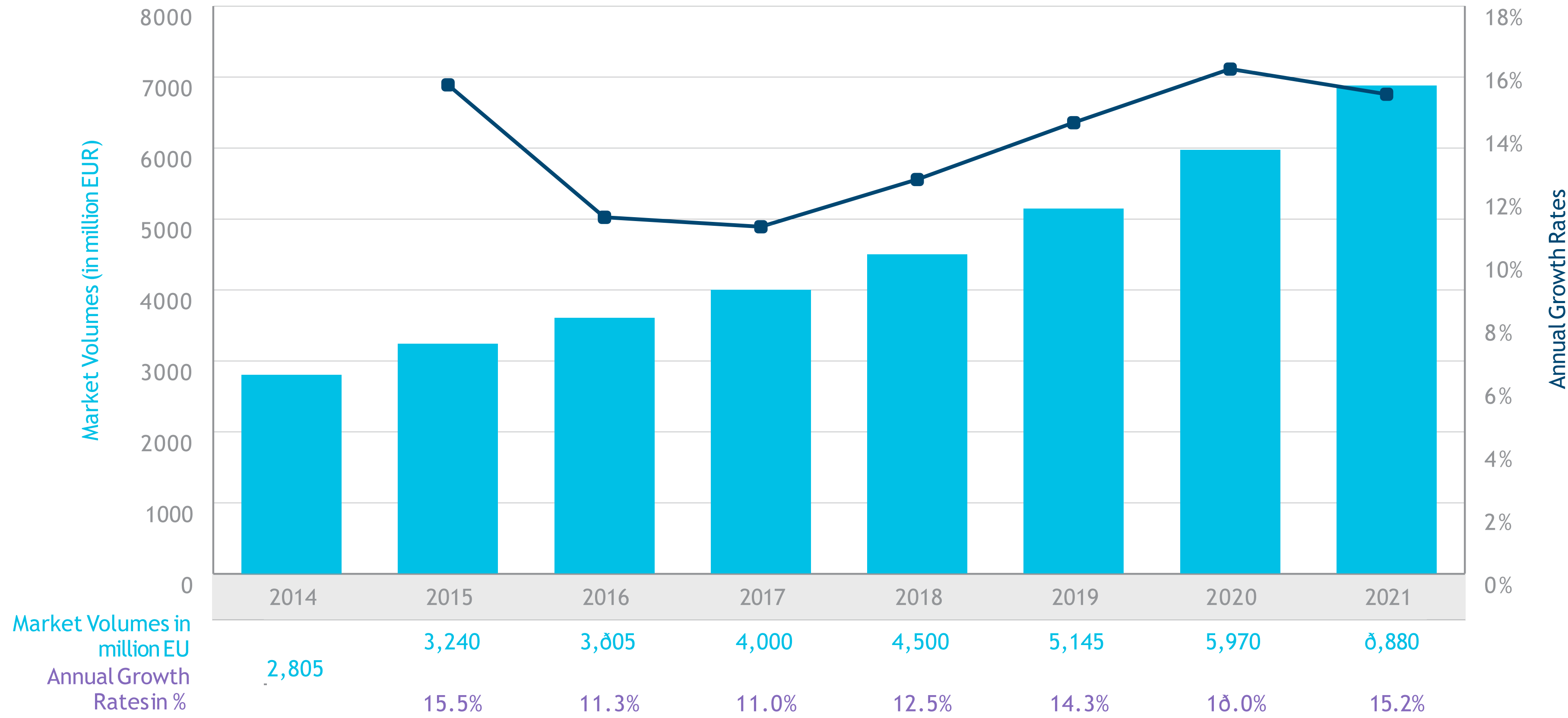
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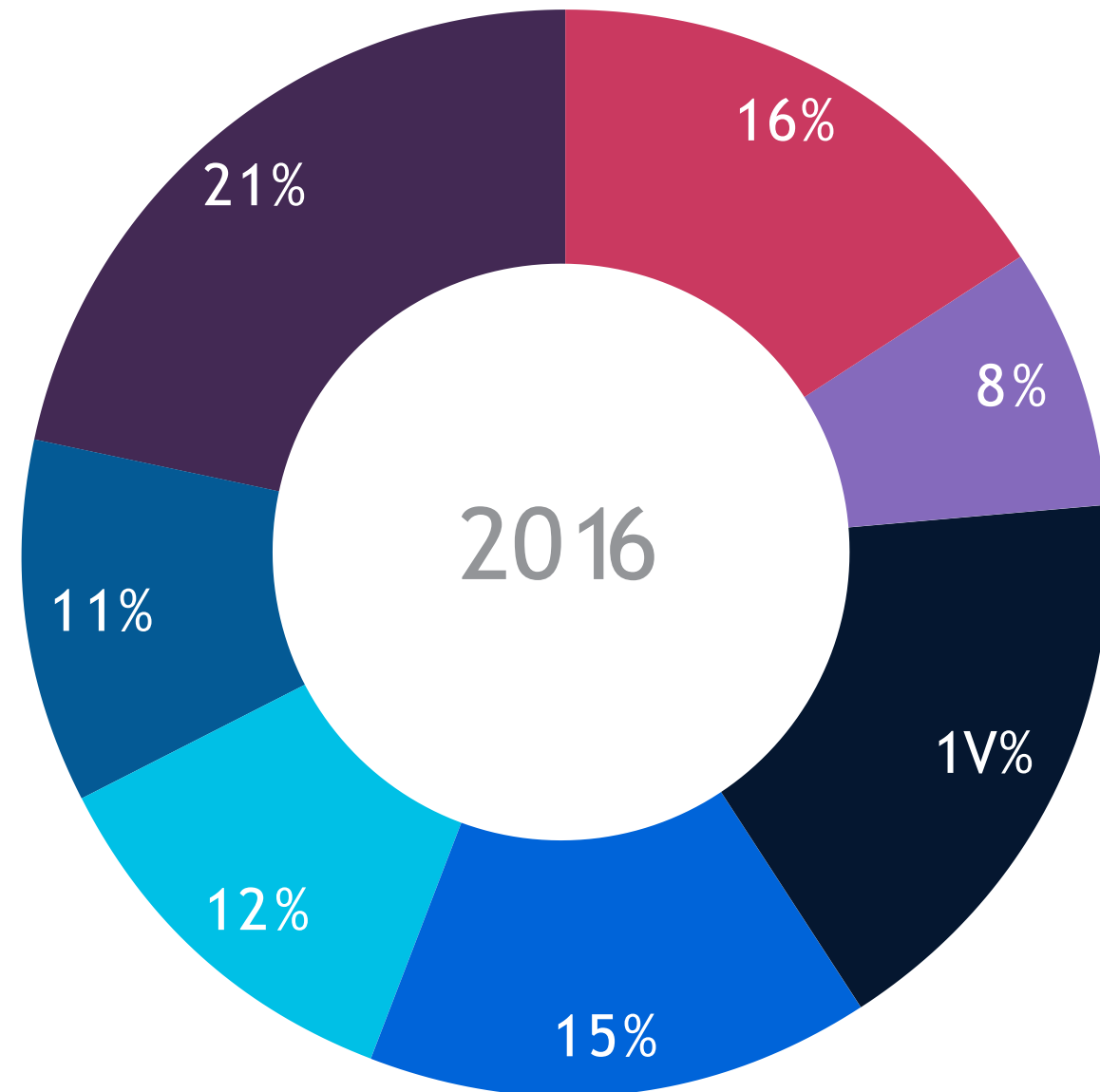
# Total Romanian SITS Industry



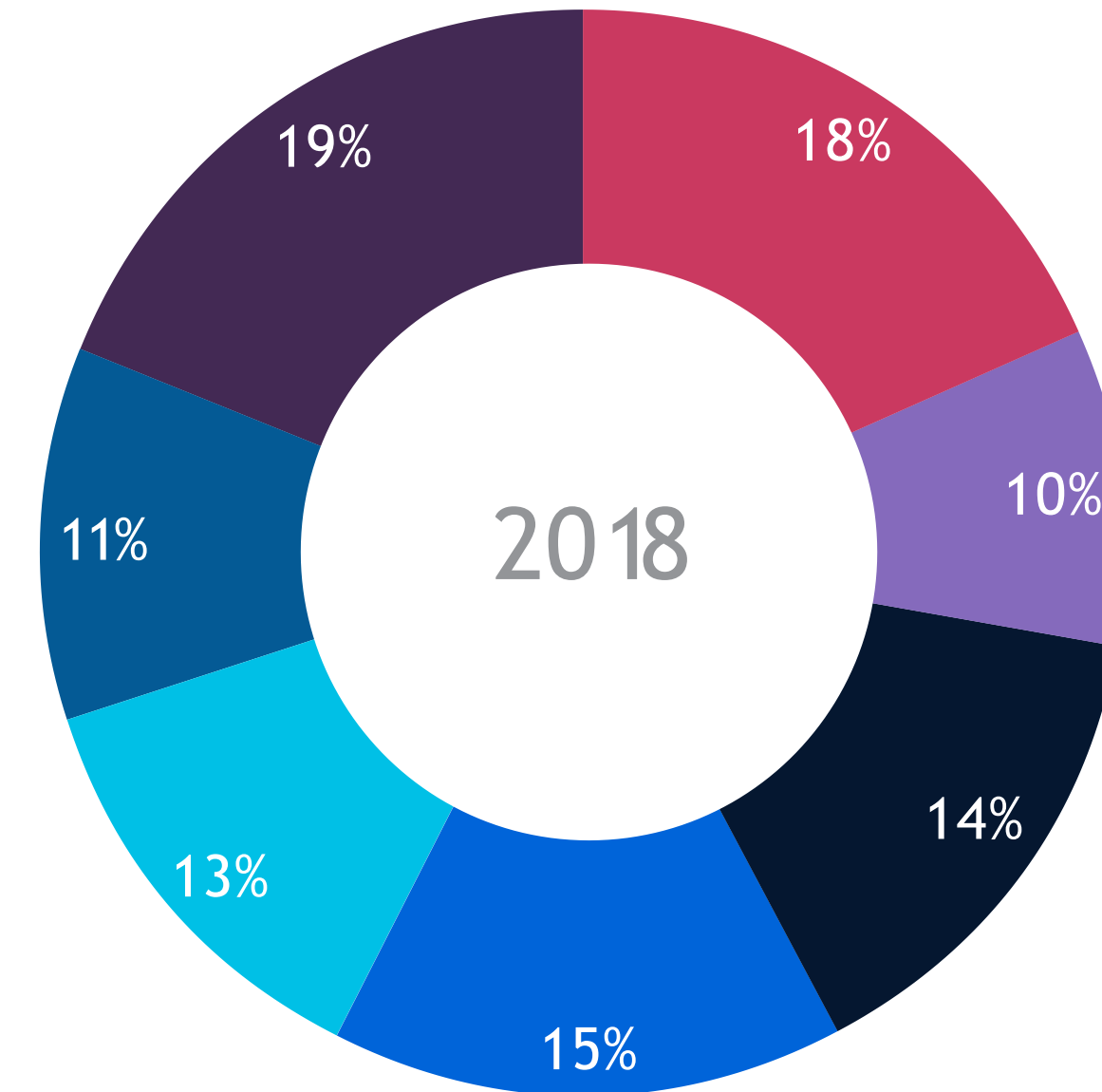
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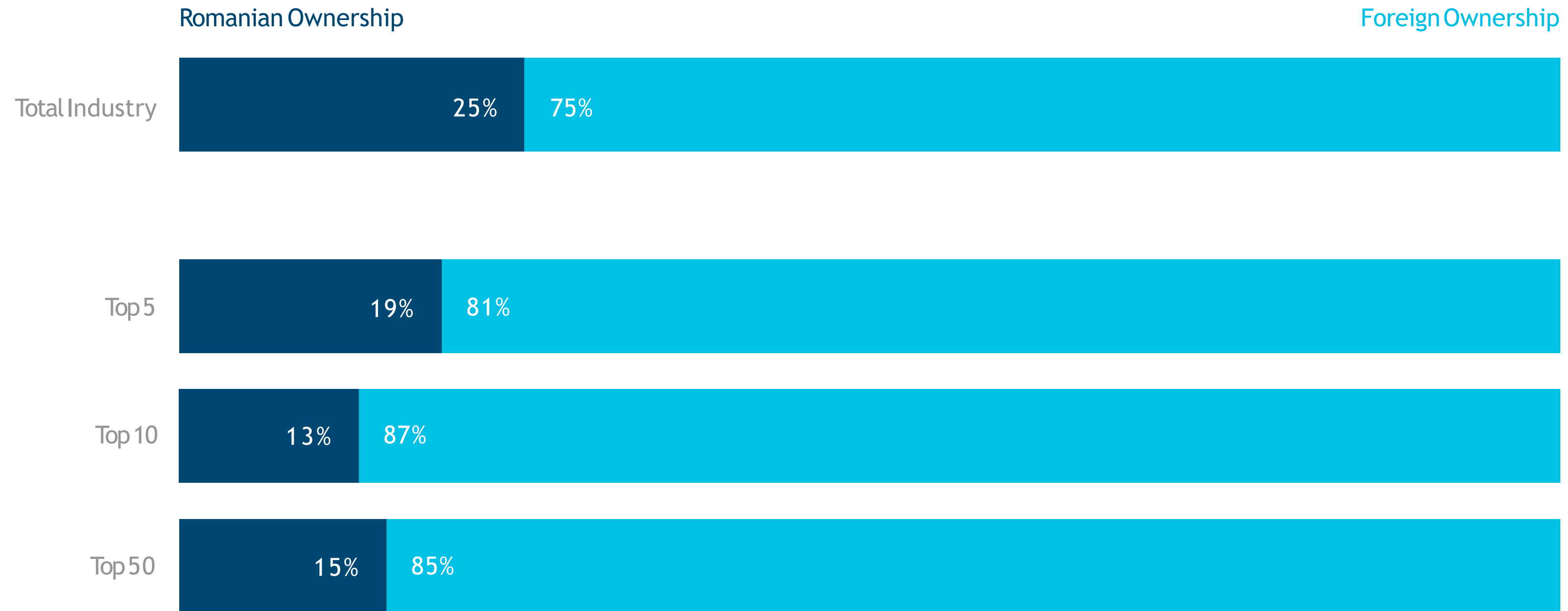
# Players' Shares for the Total Romanian SITS Industry 2016 vs. 2018



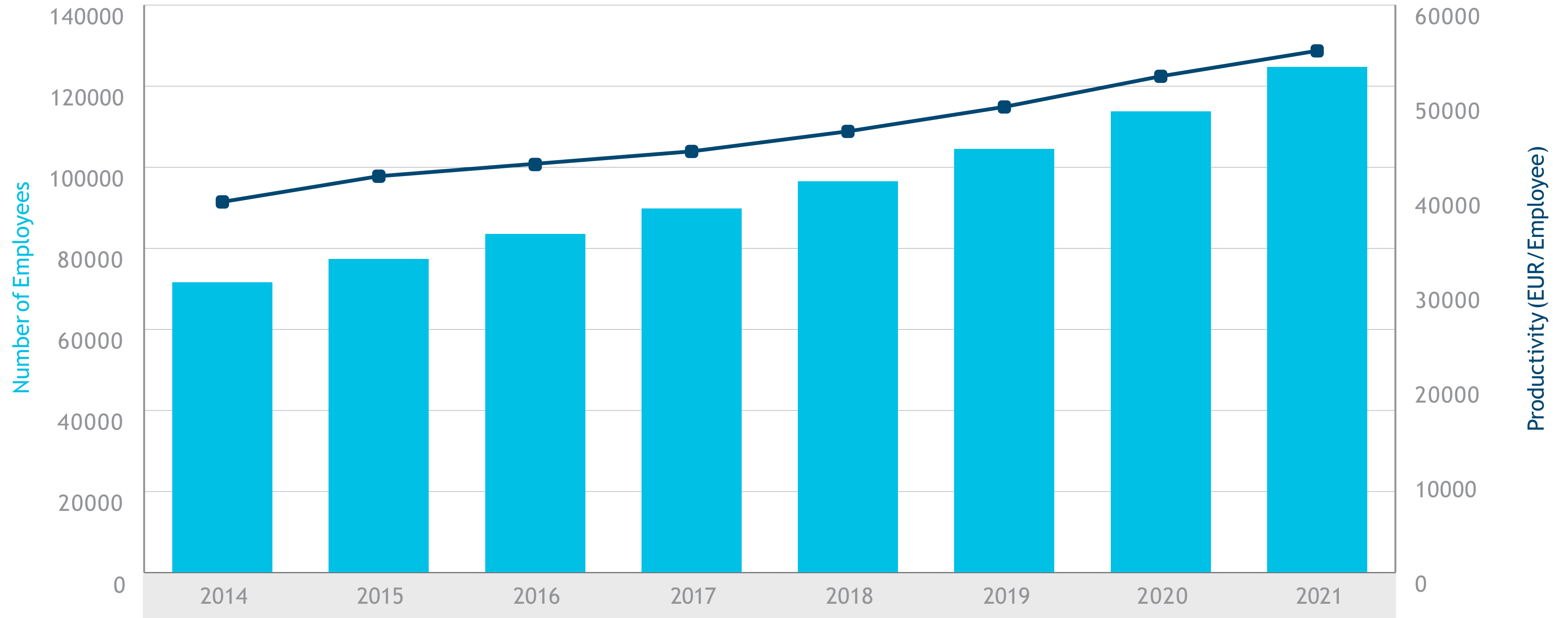
- Top 5
- Top 6-10
- Top 11-20
- Top 21-50
- Top 51-100
- Top 101-200
- Top 201+



# Ownership by Number of Employees 2017



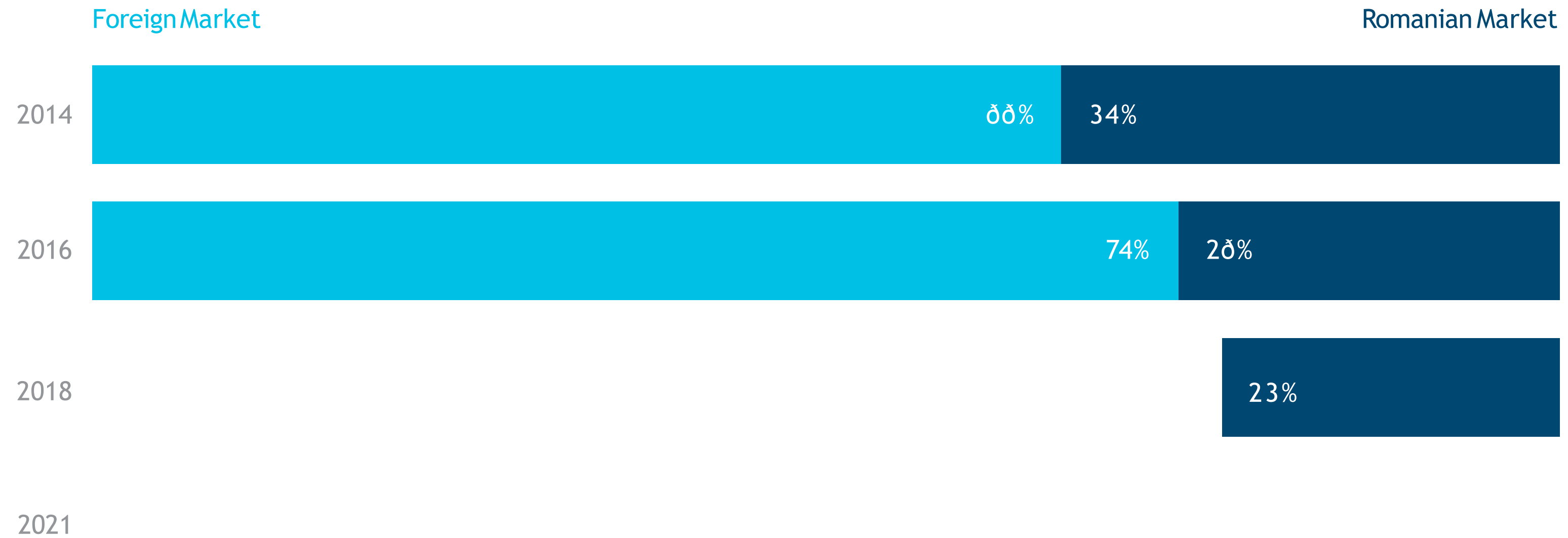
# Total Romanian SITS Industry Employees and Productivity



Number of Employees  
Productivity  
(EUR/Employee)

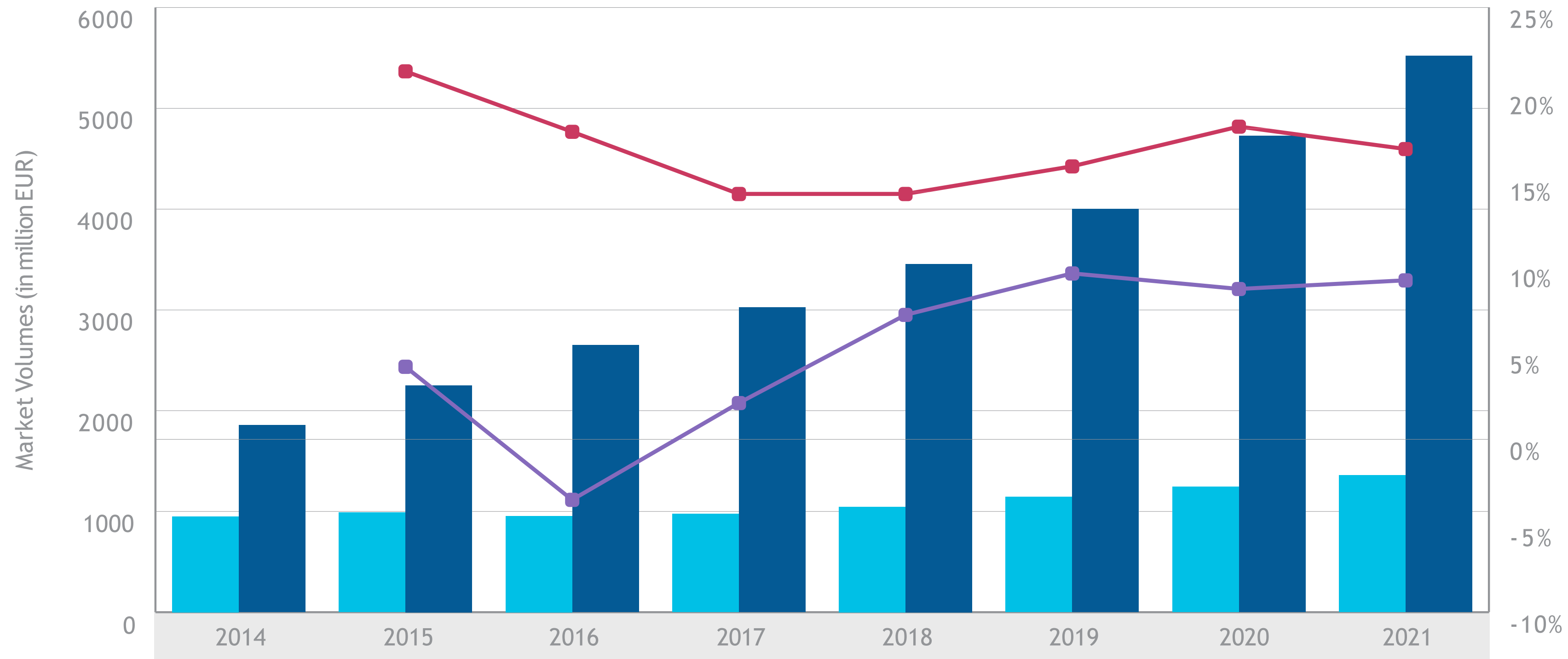
5,150

# Domestic Market vs. Export



# Revenue Breakdown by Destination Market

## - Romania vs. Export



Domestic Revenue	950	990	955	975	1,045	1,145	1,245	1,380
Foreign Revenue	1,855	2,250	2,850	3,025	3,455	4,000	4,725	5,520
Domestic Growth		4.2%	-3.5%	2.1%	7.2%	9.6%	8.7%	9.2%
Foreign Growth		21.3%	17.8%	14.2%	14.2%	15.8%	18.1%	16.8%



# Total Export SITS Revenues by Customer Location Market Volumes

