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IT Industry in 2015

November 2015

iTech Transilvania Cluster by ARIES Transilvania



Methodology

The research comprised two phases:

1. Market Overview according to the data released by the Ministry of Finance and Trade Register

The universe of analysis: 13.734 companies extracted after 9 NACE codes

CAEN	Total number of companies in function
5821 Computer games activities	183
5829 Others software products editing activities	851
6201 Custom software development (software client oriented) activities	5648
6202 Consulting in information technology activities	2445
6203 Management (administration and exploitation) for means of calculation activities	377
6209 Other information technology and computer service activities	1407
6311 The processing of data,the administration of web pages and related activities	2231
6312 Activities of web portals	421
6399 Other informational services activities n.c.a	168
TOTAL	13734

Note: Some companies have specific NACE code but not to handle IT effectively with it, and it is possible that other IT companies have CAEN code, and trade,as commerce; we consider that this exceptions don't influence significant the statistic sproccessing at national level.

The date of reporting facts: the analysis was based on the data published for the end of the year 2014.

The method of analysis: segmentation by number of employees, specific area and turnover.



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2. Quantitative research at national level

The universe of research: IT private companies from Romania.

The sample: sample exploratory of companies selected by turnover of company and number of employees.

The volume of sample: 393 of subjects, one for each company. The people from HR departments, the best informed about the research theme, answered the questionnaire; a single subject for each company.

The method of applying the questionnaire: CATI (Computer-Assisted Telephone Interviewing)

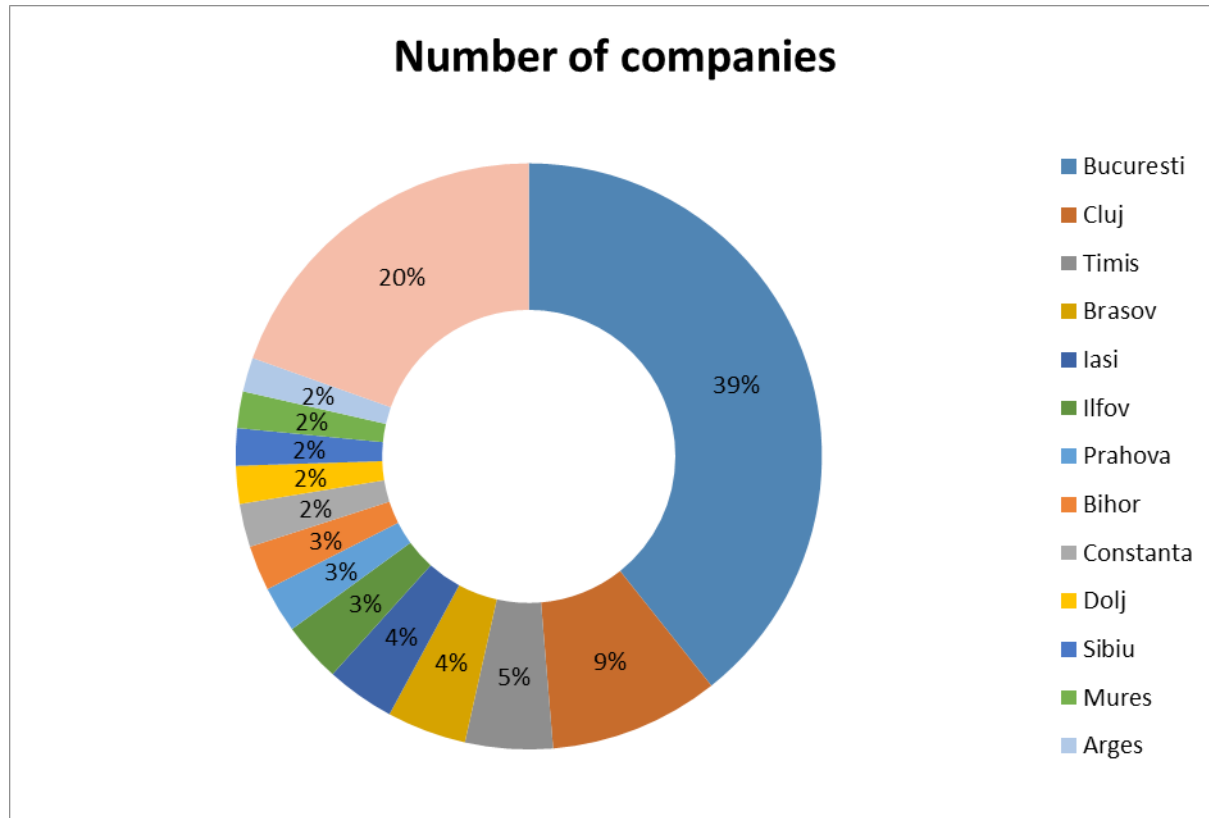
The period of application of questionnaire: the 25th of October-the 6th of November 2015.



The situation of IT industry from Romania

A.The number of IT companies in Romania

In Romania operates 13.734 IT companies nationally distributed as follows:



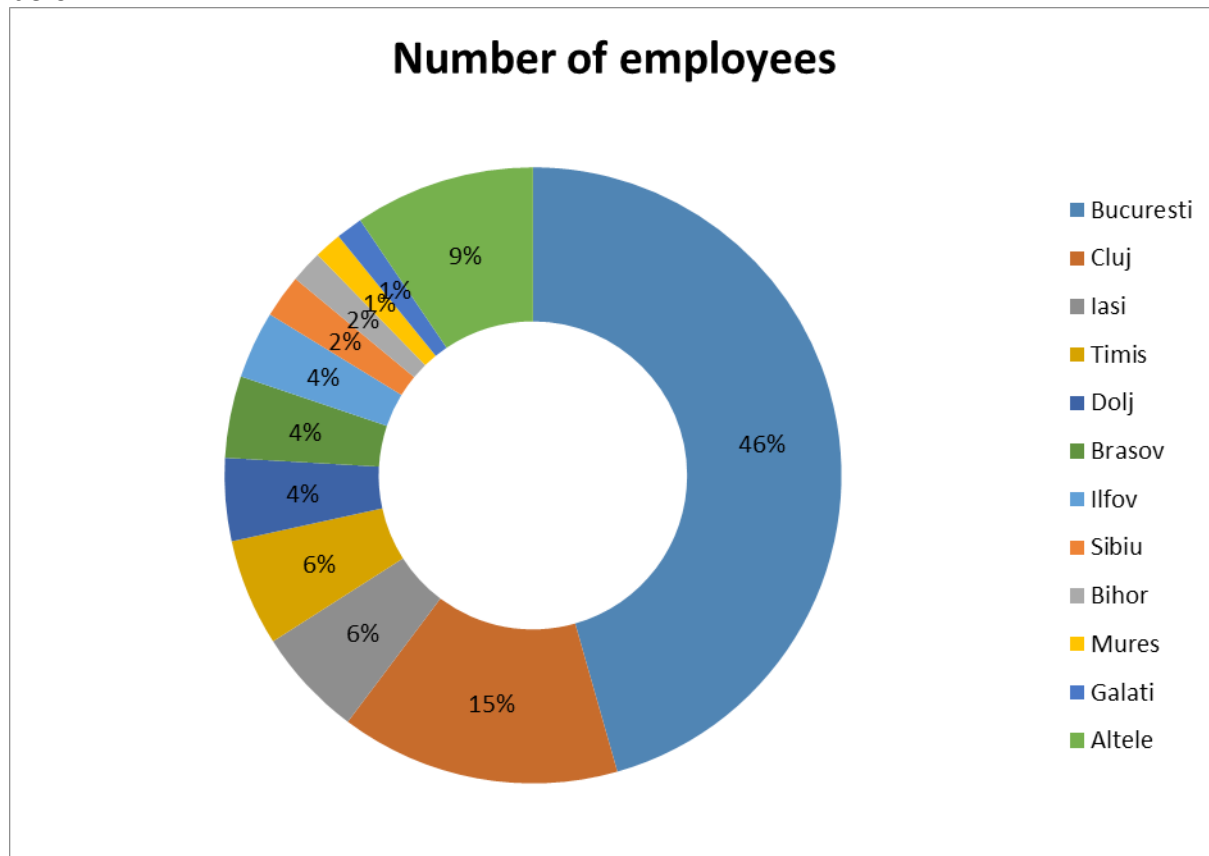
Bucharest, Cluj and Timis own more than half of IT companies in Romania, Brasov, Iasi, Ilfov and Prahova racking up another 20 percent of all IT companies.

County	Number of companies
Bucuresti	5397
Cluj	1288
Timis	663
Brasov	602
Iasi	520
Ilfov	453
Prahova	350
Bihor	342
Constanta	328
Dolj	287
Sibiu	283
Mures	277
Arges	259

County	Number of companies
Arad	188
Galati	180
Bacau	157
Maramures	152
Harghita	148
Alba	131
Valcea	118
Buzau	111
Hunedoara	110
Suceava	109
Dambovita	108
Braila	102
Gorj	101

B.The number of IT employees in Romania

At the end of 2014 the total of IT employees in Romania was 75.495, increasing with 11,93% from 2013 (67.490). The distribution of employees per counties can be seen in the chart below:



Bucharest, Cluj, Iasi and Timis own 73% of the total of employees in IT. Bucharest is by far the biggest employer in IT, ensuring almost half of the total jobs in IT in Cluj-Napoca.

County	No.employees	No.employees	2014 vs 2013	% in total 2014
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	2013	2014		
Bucuresti	32,478	34,415	5.96%	45.59%
Cluj	9,322	11,070	18.75%	14.66%
Iasi	3,139	4,302	37.05%	5.70%
Timis	3,999	4,243	6.10%	5.62%
Dolj	2,418	3,278	35.57%	4.34%
Brasov	2,817	3,245	15.19%	4.30%
Ilfov	2,217	2,673	20.57%	3.54%
Sibiu	1,428	1,710	19.75%	2.27%
Bihor	994	1,273	28.07%	1.69%
Mures	1,229	1,090	-11.31%	1.44%
Galati	918	1,055	14.92%	1.40%
Prahova	908	988	8.81%	1.31%
Constanta	495	702	41.82%	0.93%
Arges	538	579	7.62%	0.77%
Maramures	445	538	20.90%	0.71%
Valcea	357	356	-0.28%	0.47%
Arad	265	303	14.34%	0.40%
Neamt	267	285	6.74%	0.38%
Hunedoara	263	278	5.70%	0.37%
Satu Mare	284	273	-3.87%	0.36%
Harghita	267	270	1.12%	0.36%
Gorj	171	246	43.86%	0.33%
Bacau	160	220	37.50%	0.29%
Suceava	201	206	2.49%	0.27%
Alba	177	198	11.86%	0.26%
Covasna	164	183	11.59%	0.24%
Dambovita	161	169	4.97%	0.22%
Braila	168	155	-7.74%	0.21%
Buzau	119	151	26.89%	0.20%
Bistrita Nasaud	144	141	-2.08%	0.19%
Olt	70	100	42.86%	0.13%
Vrancea	100	98	-2.00%	0.13%
Vaslui	93	93	0.00%	0.12%
Botosani	120	93	-22.50%	0.12%
Salaj	95	88	-7.37%	0.12%

Tulcea	72	72	0.00%	0.10%
Mehedinti	78	71	-8.97%	0.09%
Ialomita	73	62	-15.07%	0.08%
Teleorman	67	62	-7.46%	0.08%
Calarasi	54	57	5.56%	0.08%
Giurgiu	61	56	-8.20%	0.07%
Caras Severin	54	48	-11.11%	0.06%
Grand Total	67,450	75,495	11.93%	

In the top 10, seven counties had growth above the national average. Iasi is the leader with 37.05%, followed by Dolj, Bihor, Ilfov, Sibiu, Cluj and Brasov. All these counties have experienced a significant increase in IT last year, Bucharest leveling off to an increase of under 6%.

10 cities, most residences of the counties above, are distinguished by a number over 1000 employees in IT.

Cities	Number of employees 2013	Number of employees 2014	2014 vs 2013
Bucuresti	32,478	34,415	5.96%
Cluj-Napoca	8,870	10,593	19.43%
Iasi	3,051	4,155	36.18%
Timisoara	3,592	3,798	5.73%
Craiova	2,376	3,233	36.07%
Brasov	2,584	2,983	15.44%
Sibiu	1,081	1,238	14.52%
Voluntari	1,148	1,234	7.49%
Galati	905	1,043	15.25%
Oradea	874	1,035	18.42%

The most impressive increases are recorded by Craiova and Iasi, both with technical universities and with significant investments in IT which started later than Bucharest or Cluj.

C. TOP 100 employers in Romania

IBM ROMANIA SRL	
Bucuresti	1,817
UBISOFT SRL	
Bucuresti	1,315
GAMELOFT ROMANIA SRL	
Bucuresti	1,164
ENDAVA ROMANIA SRL	
Cluj	1,142
SOFTVISON	
Cluj	1,036
LUXOFT PROFESSIONAL ROMANIA SRL	
Bucuresti	932
ATOS IT SOLUTIONS AND SERVICES SRL	
Bucuresti	894
METRO SYSTEMS ROMANIA SRL	
Ilfov	710
SIVECO ROMANIA SA	
Bucuresti	695
SCC SERVICES ROMANIA SRL	
Iasi	665
BITDEFENDER SRL	
Bucuresti	595
IQUEST TECHNOLOGIES SRL	
Brasov	126
Cluj	370
BOSCH SERVICE SOLUTIONS SRL	
Timis	447
ELECTRONIC ARTS ROMANIA SRL	
Bucuresti	434
MISYS INTERNATIONAL FINANCIAL SYSTEMS SRL	
Bucuresti	428
STAR STORAGE S.A.	
Bucuresti	398
IXIA SRL	

Bucuresti	393
INTRAROM SA	
Bucuresti	392
EBS ROMANIA S.A.	
Cluj	386
ACCENTURE INDUSTRIAL SOFTWARE SOLUTIONS S.A.	
Cluj	380
TOTAL SOFT SA	
Ilfov	379
EXPERT ONE RESEARCH SRL	
Bucuresti	362
MICROSOFT ROMANIA SRL	
Bucuresti	362
FORTECH SRL	
Cluj	345
TATA TECHNOLOGIES SRL	
Brasov	337
PENTALOG ROMANIA SRL	
Brasov	334
OSF GLOBAL SERVICES SRL	
Bucuresti	333
AROBS TRANSILVANIA SOFTWARE S.A.	
Cluj	319
INFORMATICA FERVIARA SA	
Bucuresti	312
SAP ROMANIA SRL	
Bucuresti	308
VODAFONE ROMANIA TECHNOLOGIES SRL	
Ilfov	300
MIND SOFTWARE SRL	
Iasi	292
FREESCALE SEMICONDUCTOR ROMANIA SRL	
Bucuresti	283
EOZON SYSTEMS SRL	
Cluj	283
ADOBE SYSTEMS ROMANIA SRL	
Bucuresti	274

1&1 INTERNET DEVELOPMENT SRL	
Bucuresti	274
AMAZON DEVELOPMENT CENTER (ROMANIA) SRL	
Iasi	269
YONDER SRL	
Cluj	266
CRYS COMPUTERS SRL	
Bucuresti	251
3PILLAR GLOBAL SRL	
Cluj	250
SAGUARO PRINT SRL	
Timis	247
INFINEON TECHNOLOGIES ROMANIA & CO. SCS	
Bucuresti	246
VEO WORLDWIDE SERVICES SRL	
Iasi	243
BETFAIR ROMANIA DEVELOPMENT SRL	
Cluj	242
PROPERTY SHARK SRL	
Cluj	238
AXWAY ROMANIA SRL	
Bucuresti	230
SOBIS SOLUTIONS SRL	
Sibiu	225
ENEA SERVICES ROMANIA SRL	
Bucuresti	225
VISMA SOFTWARE SRL	
Sibiu	221
BITECH COMPANY SRL	
Bucuresti	220
ACI WORLDWIDE (EASTERN EUROPE DEVELOPMENT) SRL	
Timis	217
TOLUNA ROMANIA SRL	
Timis	214
AMOMA ROMANIA SUPPORT SERVICES SRL	
Ilfov	214
KEPLER - ROMINFO SA	

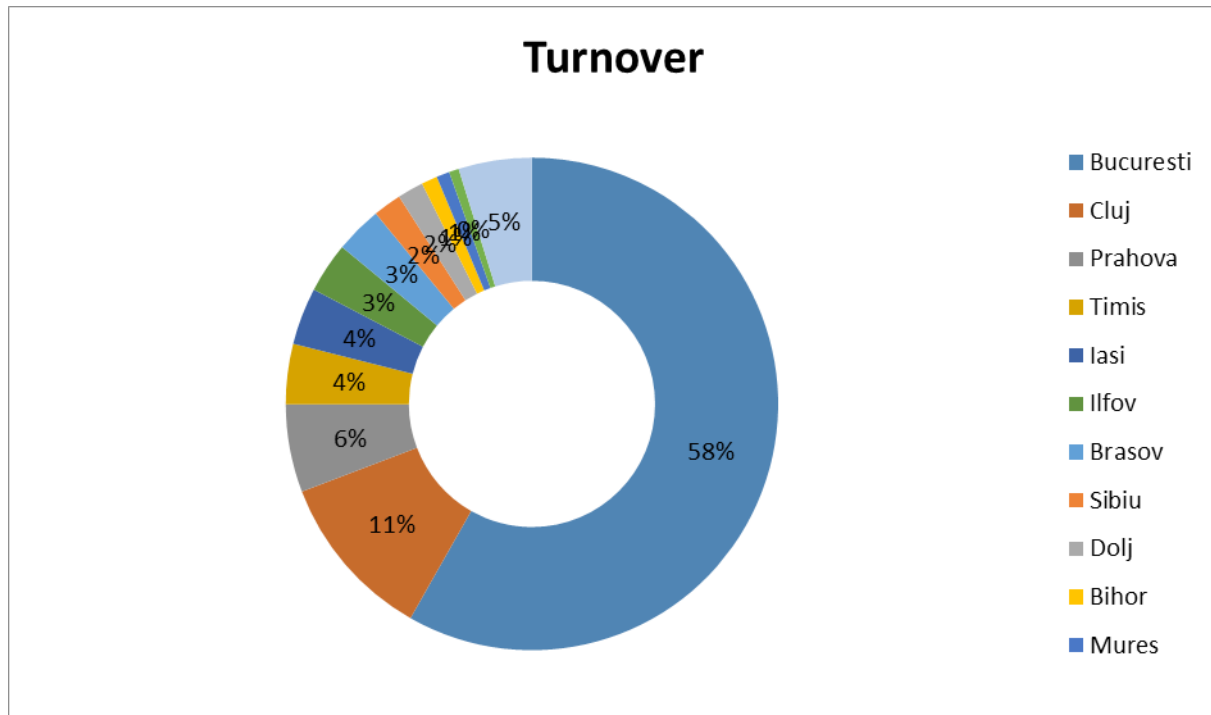
Bucuresti	204
ISDC ROMANIA SRL	
Cluj	200
MSG SYSTEMS ROMANIA SRL	
Cluj	194
RINF OUTSOURCING SOLUTIONS SRL	
Bucuresti	192
CRYSTAL SYSTEM SRL	
Bucuresti	190
SIEMENS CONVERGENCE CREATORS SRL	
Brasov	186
EUROSCRIPT - CERTITUDE SRL	
Bucuresti	185
TEMENOS ROMANIA SRL	
Bucuresti	184
AREZZO SKY SRL	
Bucuresti	184
ROMSYS SRL	
Bucuresti	183
INFO WORLD SRL	
Bucuresti	179
CEGEKA ROMANIA SRL	
Bucuresti	178
INTEL SOFTWARE DEVELOPMENT SRL	
Bucuresti	168
PRINTEC GROUP ROMANIA SRL	
Bucuresti	165
EVERYMATRIX SRL	
Bucuresti	164
WOLTERS KLUWER FINANCIAL SERVICES ROMANIA SRL	
Cluj	156
TEAMNET SOLUTIONS INTERNATIONAL SRL	
Bucuresti	155
ECTA 74 SOFTWARE SRL	
Bucuresti	153
OCE SOFTWARE SRL	
Timis	152

LANGUAGE WEAVER SRL	
Cluj	151
AQUASOFT SRL	
Bucuresti	148
TORA TRADING SERVICES SRL	
Cluj	142
GARMIN CLUJ SRL	
Cluj	140
EMAG IT RESEARCH SRL	
Ilfov	139
SISTEC-SBSOL SRL	
Bucuresti	138
ALTEN SI-TECHNO ROMANIA SRL	
Bucuresti	135
CERTSIGN SA	
Bucuresti	132
NESS ROMANIA SRL	
Iasi	128
CENTRIC IT SOLUTIONS ROMANIA SRL	
Iasi	127
NEUSOFT EDC SRL	
Cluj	125
SOFTWARE INTERNET INTERNATIONAL S2I SRL	
Bucuresti	123
SII IT & C SERVICES SRL	
Bucuresti	122
WATERS ROMANIA SRL	
Brasov	121
VIDEO PLAY STREAMING SERVICE SRL	
Timis	117
UNIFY SERVICE CENTRE SRL	
Brasov	117
AVIRA SOFT SRL	
Bucuresti	114
ACTIVE POWER SOLUTIONS SRL	
Cluj	111
S & T ROMANIA SRL	

Bucuresti	109
AWINTA CONSULTING SRL	
Brasov	105
ULLINK CENTRUL DE COMPETENTA SRL	
Cluj	104
PTC EASTERN EUROPE SRL	
Bucuresti	103
ZITEC COM SRL	
Bucuresti	102
OPEN PUBLIC SERVICE SRL	
Bucuresti	102
NOBUG CONSULTING SRL	
Bucuresti	99
ARTSOFT CONSULT SRL	
Cluj	99
MOOD MEDIA ROMANIA SRL	
Bucuresti	99
SSI SCHAEFER SRL	
Timis	98
VALLDATA SERVICES LIMITED MELKSHAM SRL-SUCURSALA IASI	
Iasi	98

D. Turnovers of IT companies

The total turnover of IT industry from Romania was **15.955.448.124 RON**, increasing with **26,04%** to 2013 (12.659.140.267 RON).



Bucharest is distinguished by almost 60% of value of IT industry while Cluj is about 11% and the other counties below 10%.

County	Turnover 2013	Turnover 2014	2014 vs 2013	% in total 2014
Bucuresti	7,443,402,697	9,288,163,775	24.78%	58.21%
Cluj	1,351,006,182	1,754,184,338	29.84%	10.99%
Prahova	819,658,875	919,699,187	12.21%	5.76%
Timis	485,603,734	632,110,994	30.17%	3.96%
Iasi	358,198,816	598,468,665	67.08%	3.75%
Ilfov	426,463,233	527,416,572	23.67%	3.31%
Brasov	394,869,618	491,014,203	24.35%	3.08%
Sibiu	232,407,984	296,644,402	27.64%	1.86%
Dolj	209,541,811	273,137,673	30.35%	1.71%
Bihor	110,523,714	166,214,503	50.39%	1.04%

Mures	120,212,091	137,355,981	14.26%	0.86%
Galati	84,063,619	102,812,067	22.30%	0.64%
Maramures	58,069,979	74,940,111	29.05%	0.47%
Arges	48,814,867	72,406,554	48.33%	0.45%
Constanta	60,536,548	70,491,069	16.44%	0.44%
Arad	43,681,482	43,095,866	-1.34%	0.27%
Harghita	24,188,764	39,090,137	61.60%	0.24%
Satu Mare	34,447,545	37,095,723	7.69%	0.23%
Neamt	32,916,705	37,032,135	12.50%	0.23%
Valcea	37,237,429	35,069,422	-5.82%	0.22%
Hunedoara	28,859,481	30,481,875	5.62%	0.19%
Botosani	16,614,747	27,423,901	65.06%	0.17%
Covasna	20,957,737	27,347,229	30.49%	0.17%
Suceava	22,215,262	26,583,806	19.66%	0.17%
Bistrita Nasaud	18,506,749	25,567,302	38.15%	0.16%
Buzau	18,539,412	24,395,640	31.59%	0.15%
Gorj	17,922,578	23,341,513	30.24%	0.15%
Alba	18,265,384	22,755,314	24.58%	0.14%
Bacau	15,602,782	22,063,579	41.41%	0.14%
Dambovita	12,601,417	17,662,814	40.17%	0.11%
Salaj	10,592,300	14,797,554	39.70%	0.09%
Braila	13,173,348	14,083,410	6.91%	0.09%
Olt	8,776,910	13,250,613	50.97%	0.08%
Vaslui	12,400,241	13,183,744	6.32%	0.08%
Calarasi	6,147,281	10,553,229	71.67%	0.07%
Vrancea	7,897,970	9,425,743	19.34%	0.06%
Mehedinti	9,941,480	8,103,572	-18.49%	0.05%
Teleorman	6,759,158	7,030,289	4.01%	0.04%
Giurgiu	5,172,000	6,863,826	32.71%	0.04%
Ialomita	5,901,516	6,152,466	4.25%	0.04%
Caras Severin	3,350,339	4,011,260	19.73%	0.03%
Tulcea	3,096,482	3,926,068	26.79%	0.02%
Grand Total	12,659,140,267	15,955,448,124	26.04%	



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In top 10, 6 counties have a growth over the market average. Once again Iasi is leader with 67,08%, followed by Bihor (50,39%), Dolj (30,35%), Timis (30,17%), Cluj (29,84%) and Sibiu (27,64%).

E. Top companies by turnover



IBM ROMANIA SRL	Bucuresti		645,559,195
SIVECO ROMANIA SA	Bucuresti	B-dul Nicolae Titulescu, nr.4 400420 Cluj-Napoca, Romania Tel./Fax: 0264 430520	257,824,334
BITDEFENDER SRL	Bucuresti	www.aries-transilvania.ro aries.transilvania@gmail.com	251,516,730
EXPERT ONE RESEARCH SRL	Bucuresti		246,923,443
MICROSOFT ROMANIA SRL	Bucuresti		194,629,302
TEAMNET BUSINESS SERVICES SRL	Bucuresti		187,076,085
SAP ROMANIA SRL	Bucuresti		173,942,657
ROMSYS SRL	Bucuresti		171,087,810
ENDAVA ROMANIA SRL	Cluj		165,568,878
ATOS IT SOLUTIONS AND SERVICES SRL	Bucuresti		164,913,278
S & T ROMANIA SRL	Bucuresti		158,729,809
BION ADVANCED SUPPORT TEAM SRL	Bucuresti		157,170,341
LUXOFT PROFESSIONAL ROMANIA SRL	Bucuresti		142,952,005
UBISOFT SRL	Bucuresti		135,737,299
INTRAROM SA	Bucuresti		121,775,044
METRO SYSTEMS ROMANIA SRL	Ilfov		119,132,562
ELECTRONIC ARTS ROMANIA SRL	Bucuresti		110,456,247
TOTAL SOFT SA	Ilfov		100,214,726
E.ON BUSINESS SERVICES IASI SRL	Iasi		100,201,757
IQUEST TECHNOLOGIES SRL	Cluj		84,192,311
	Brasov		15,123,986
EBS ROMANIA S.A.	Cluj		97,728,905
INFINEON TECHNOLOGIES ROMANIA & CO. SCS	Bucuresti		96,262,867
GAMELOFT ROMANIA SRL	Bucuresti		93,739,109
IXIA SRL	Bucuresti		92,792,549
INFOTREAT SRL	Bucuresti		92,688,425
KAPSCH SRL	Bucuresti		86,042,002





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Quantitative questionnaire

Good afternoon,

My name is _____ and I'm calling you from ARIES Transilvania. We are conducting a market survey to determine the size of the IT market in Romania and the level of expertise and payroll. Your answers can be of great use and will be processed statistically in the study keeping your anonymity. Please be kind and give us 10 minutes for answer to some questions on this topic.

q1. What was the total number of employees and contributors (in PFA regime) of your company at the end of the year 2014?

q1_1. But now? |_|_|_|_| people
 |_|_|_|_| people

q2. What percentage represent people who is occupying positions at senior level in total employees and collaborators(PFA) in your company? |_|_| %

q3. Which are the IT technologies used in your company? Which is the percentage of employees/collaborators who work in these departments?

	Techologies used	q3. Use	q4. The percentage of developers
a.	.NET	1. Yes 2. No	_ _ %
b.	JAVA	1. Yes 2. No	_ _ %
c.	C/C++	1. Yes 2. No	_ _ %



	Technologies used	q3. Use	q4. The percentage of developers
d.	DATABASE/DATAWAREHOUSE	1.Yes 2.No	_ _ %
e.	Web development (PHP, JS, etc)	1.Yes 2.No	_ _ %
f.	MOBILE (iOS, Android, Windows)	1.Yes 2.No	_ _ %
g.	UI (User Interface)/UX (User Experience)	1.Yes 2.No	_ _ %
h.	Testing / Quality Assurance	1.Yes 2.No	_ _ %
i.	Related developments (Business Analyst, Software Architect, Project Management)	1.Yes 2.No	_ _ %
j.	Another technology. Which? _____	1.Yes 2.No	_ _ %
	Personal nonIT (HR, MK, financial, funds, etc)	1.Yes 2.No	_ _ %

q5. What is, roughly, the percentage of revenue of your company accomplished from...?

- a. Outsourcing |_|_|_| %
b. Solutions/ own products |_|_|_| %

q6. What are the countries the customers of your company are from?

- a. Country1 _____
b. Country2 _____
c. Country3 _____
d. Country4 _____
e. Country5 _____

q7. What is the net salary in your company? |_____| RON

Consider the medium net salary from the middle of 2015.

q8. Did you operate or intend to operate wage increases in 2015??

- 1.Yes 2.No

q8_1. Which is the medium percentage you applied? |__|__|%

q9. What is the turnover of company in percentage in 2015? |__|__| %

q9_1. But at the end of 2014? |__|__| %

q10. What is, roughly , the number of developers your company plans to hire the next year? |__|__|

q11. What are the benefits offered to your employees?

a. Food vouchers	1
b. Full or partial food pay	
c. Health insurance/ private medical service subscription	1
d. Allocation of money for practice a sport/ purchase of sport equipment	1
e. One meal provided/ fruits at the office	1
f. Performance bonuses	1
g. Bonuses for recommending a person	1
h. Bonuses for Christmas/ Easter/ Vacation	1
i. 13th salary	
j. Seniority bonus	
k. Training	1
l. Events dedicated to employees (team buildings, Christmas party, etc.)	1
m. Contributions to the privates pensions	
n. Financial support for special family events (birth, deceases, marriage)	
o. Other benefits. Which?	1

Q12. Do you have a training buget?

1. Yes

2. No

Q12_1. If yes, what is the average/employee amount? / _____ / lei

Results

If we report to the personal structure, we notice that in approximate 41% of the companies interviewed, the staff in the senior positions represents maximum a quarter of all employees. In 24% of the companies, these are found in proportion of over 50%.

The technologies used by most of the companies (over 50% of these) are : JAVA ~ 52%, those for mobile applications ~ 58%, and those for Web Development ~ 53%. The departments that concentrate the highest proportion of personal are Web Development (approximate 55% of the company staff), Mobile (app 55%) and Database / Data Warehouse (56% of staff). The non-IT stuff (human resources, marketing, financial, etc.) represents, in average, approximate, a third part of the total staff.

The earnings of the companies in IT are coming in a large proportion from solutions/own products (approximate 48% of the earnings). The companies that have up to 10 employees make approximate 56% of these earnings from own products and solutions, and approximate 43% of them have earnings exclusive from these solutions. For bigger companies, with over 50 employees, the percentage of earnings from own solutions is higher (in average 69%). But the smallest percentage is found at the companies with 10-49 employees (42% of the earnings are from outsourcing and 51% from own products and solutions).

Over two third parts of the companies are working for Romanian customers, and almost a fifth with customers form USA. A higher proportion of these have beneficiaries from Germany (14%), UK (9%) and France (8%).

The average net salary at the half of 2015, state by the companies representatives inside of the study is 2950 lei. More than a half of these companies (53%) have operated or are going to operate wage increases in 2015. In average, these increases rise up to 16% of wage incomes.

Regarding the intentions to hire developers in the next year, up to 48% of the companies do not intend hiring this category of staff. The ones that do intend, want to hire, in average, 7 new developers.

The benefits that are offered in the highest proportion by the IT companies are trainings and bonuses for holidays or vacation (app 58%), performance bonuses (55%), events dedicated to employees (51%), financial support for special family events (47%), health insurance (39%) and meal tickets (38%).

Even if the benefits offered by most companies consists in trainings, only 30% of the companies have a budget for trainings. The amount allocated by these for trainings offered to the employees is in average of 928 lei per person.

Q1. Which is the total number of employees and contributors (in PFA regime) of your company at the end of 2014? Q1_1 But now?

Total amount of employees of the companies in the sample

No.employees 2014	Q1- No. Total of employees + PFA 2014	Q1_1 –No. Total of employees + PFA now
5325	8107	8757

N= 383 companies. The amounts are calculated only for the companies that have answered both Q1 and Q1_1 (there have been excluded the ones that have refused to answered one of the two questions)

Q2. What percentage represents the people that hold a senior level position from the total of employees and contributors (PFA) of your company?

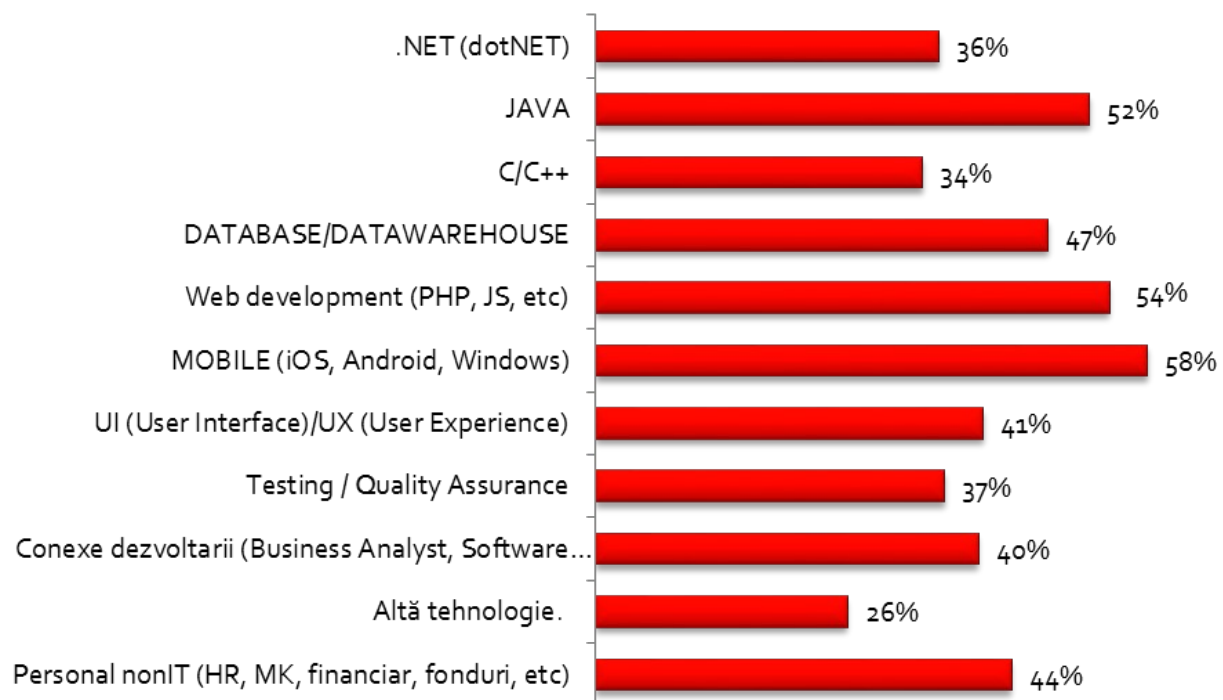
		Average percentage of seniors
Number employees/contributors	0 - 9 employees/contributors	27%
	10 - 49 employees/contributors	33%
	50+ employees/contributors	18%
Development region	NORTH- EAST	23%
	SOUTH- EAST	19%
	SOUTH	14%
	SOUTH- WEST	13%
	WEST	37%
	NORTH-WEST	25%

	CENTER	34%
	BUCHAREST-ILFOV	20%
Total		23%

N= 383 companies. The amounts are calculated only for the companies that have answered both Q1 and Q1_1 (there have been excluded the ones that have refused to answered one of the two questions)

Q3. Which are the IT technologies used in your company?

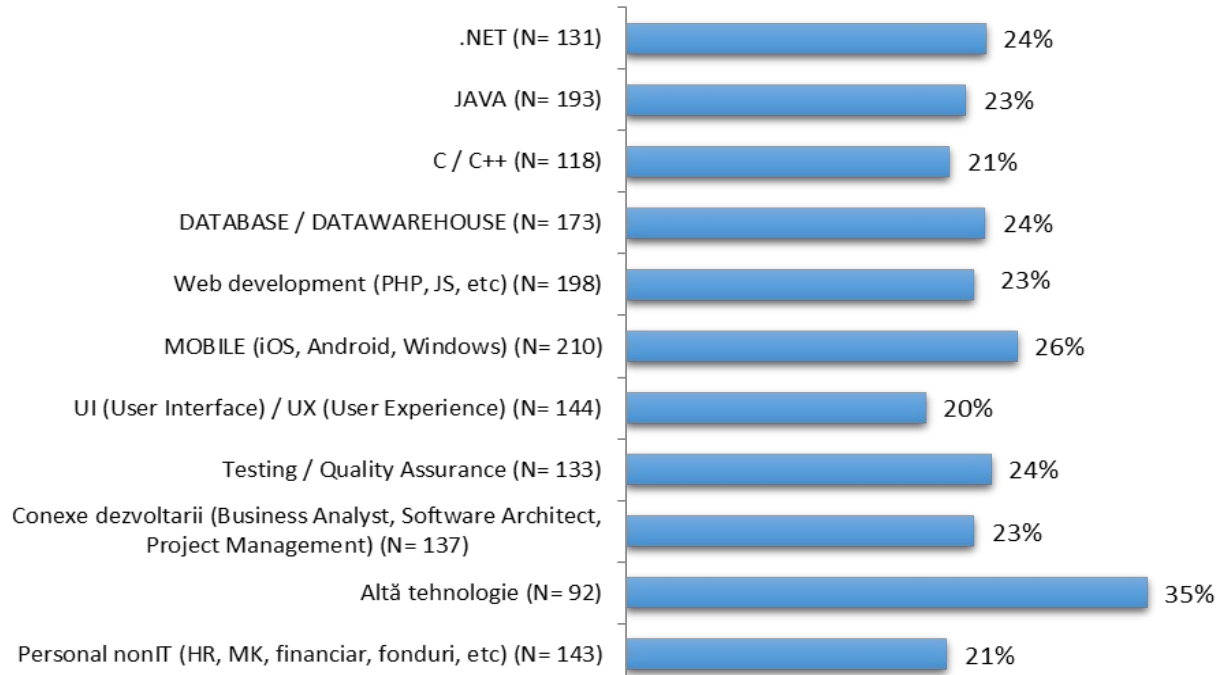
(the data represents percent form the total number of companies : ex. 36% of the number of companies use .Net technology)



N= 395

Q4. Which is the percentage of employees/ contributors who work in these departments?

Average percentage of employees that uses a technology.



N= number of companies who use technology and have answered Q4 (have been excluded the companies that do not use and do not know / answer Q4). N is different for each technology.

Q5. What is the approximate percentage of revenue the company made from...?

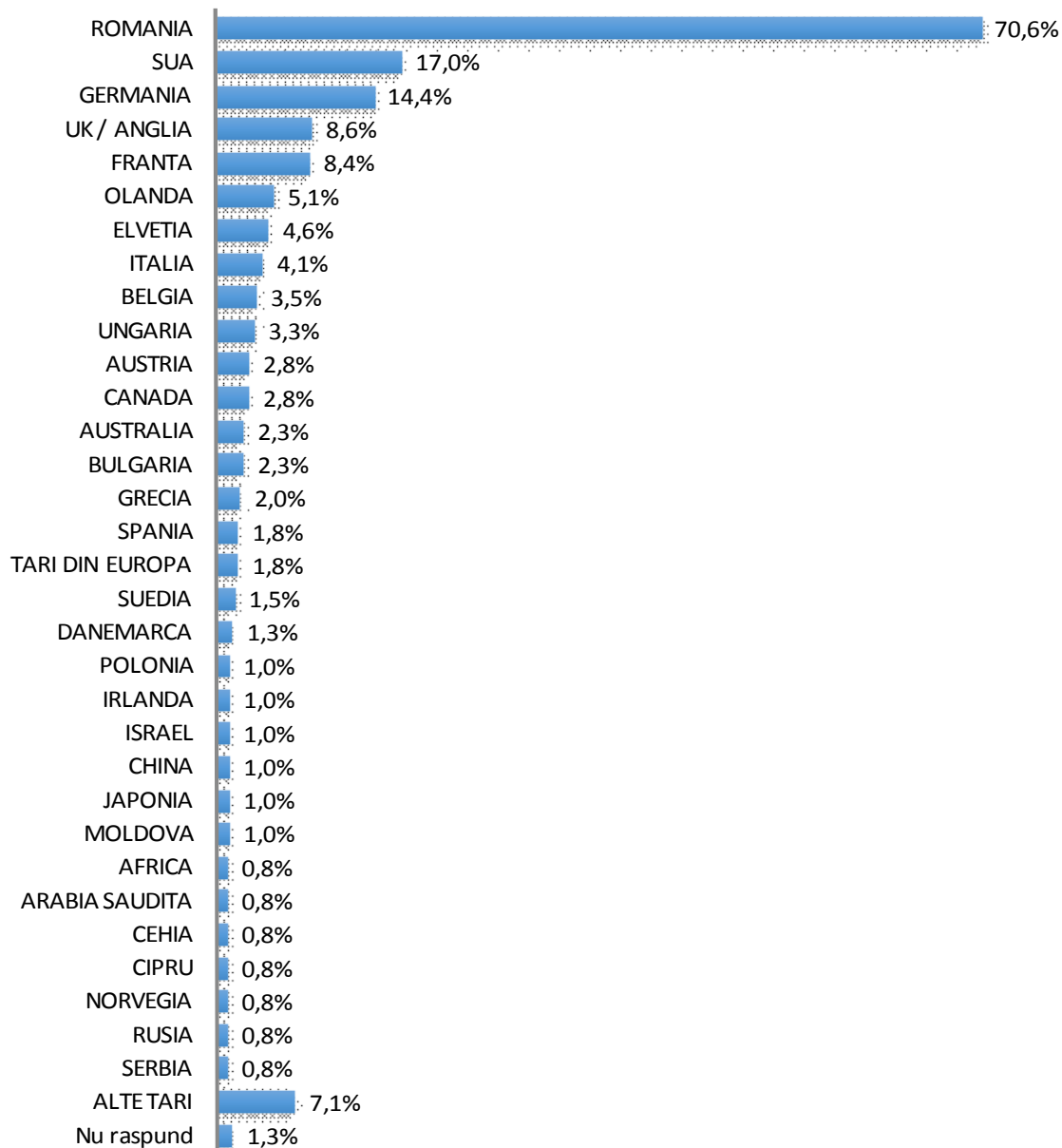
		Outsourcing N=303	Solutions/own products N=319
Number employees/ contributors	0 - 9 employees/contributors	43%	56%
	10 - 49 employees/contributors	42%	51%
	50+ employees/contributors	8%	69%
Development	NORTH-EAST	39%	69%

Region	SOUTH-EAST	27%	71%
	SOUTH	13%	75%
	SOUTH-WEST	10%	90%
	WEST	53%	48%
	NORTH-WEST	32%	43%
	CENTER	49%	55%
	BUCHAREST-ILFOV	13%	73%
Total companies		25%	61%

There have been excluded from the analysis companies with responses as „do not know”/ „do not answer”.

Note: Our industry experience makes us believe that the 25% percentage is a small one, reason why we look with doubt the answers received to this question, not all companies defining in a identical way outsourcings.

Q6. What are the countries your customers are from?



N= 395. Percent reported to the number of companies.

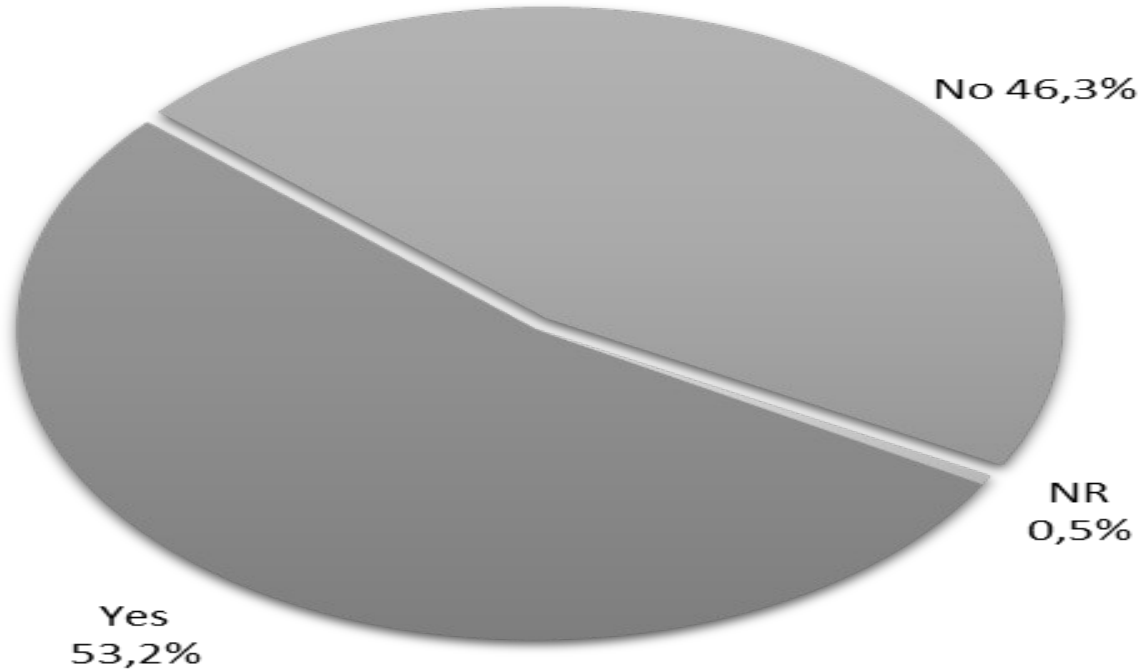
Q7. What is the average net salary in your company?

		Q7 – Average net salary in RON
Number employees/ contributors	0 - 9 employees/ contributors	2573
	10 - 49 employees/ contributors	3012
	50+ employees/ contributors	2232
Development region	NORTH-EAST	2476
	SOUTH-EAST	1460
	SOUTH	1544
	SOUTH-WEST	2534
	WEST	3030
	NORTH-WEST	2648
	CENTER	2810
	BUCHAREST-ILFOV	2619
Total		2590

N=279. There have been excluded from the analysis the companies that did not know or refuse to answer to Q7. The average net salary has been calculated by the weight of the average net medium salary declared according to the number of employees and contributors.

Note: the result is viewed with reservations due to a smaller number of respondents to this question and because of distrust expressed by some respondents in the privacy of results

Q8. Have you operated or intend to operate wage increases in 2015?



Q8_1. What is the average percentage you have applied?

		Q8 - % companies which operate/will operate salary increases in 2015 (N=395)	Q8_1- % medium of salary increases in 2015 (N=173)
Number employees/ contributors	0 - 9 employees/ contributors	49%	19%
	10 - 49 employees/ contributors	62%	13%
	50+ employees/ contributors	55%	13%
Development region	NORTH-EAST	57%	20%
	SOUTH-EAST	41%	13%
	SOUTH	57%	22%
	SOUTH-WEST	46%	14%
	WEST	52%	13%
	NORTH-WEST	63%	16%
	CENTRE	61%	15%

	BUCHAREST-ILFOV	45%	17%
Total		53%	16%

Q8_1 – The average has been calculated for the companies that have operated / are going to operate growth in 2015 and had valid answer to this question.

Q9. What was the company profit in percent in 2015? But at the end of 2014?

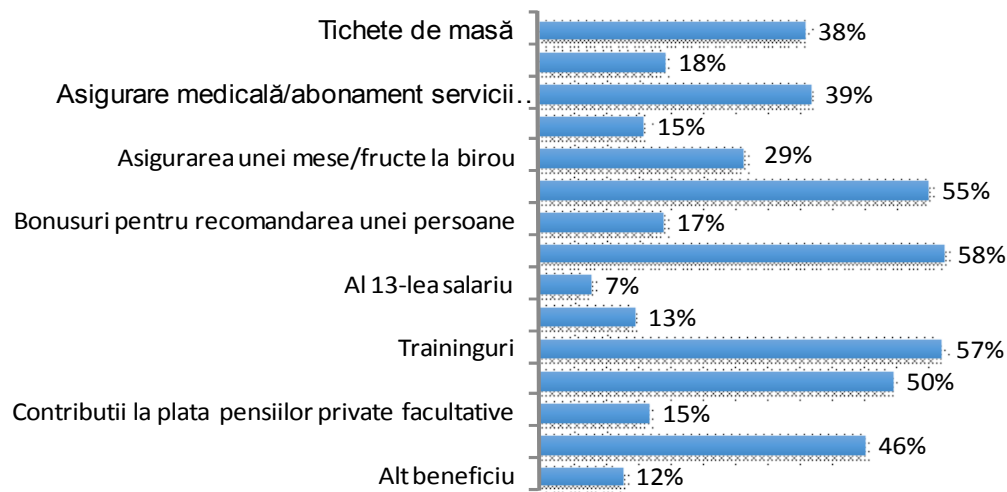
		Company profit în 2015 (%) (N=253)	Company profit at the end of 2014 (%) (N=260)
Number employees/ contributors	0 - 9 employees/ contributors	20%	18%
	10 - 49 employees/ contributors	16%	17%
	50+ employees/ contributors	11%	9%
Development region	NORTH-EAST	10%	17%
	SOUTH-EAST	13%	12%
	SOUTH	23%	21%
	SOUTH-WEST	16%	21%
	WEST	15%	13%
	NORTH-VWST	21%	21%
	CENTER	13%	12%
	BUCHAREST-ILFOV	20%	18%
Total		18%	17%

Q10. What is, roughly, the number of developers that your company intends to hire in the next year?

The total number of developers that the 351 companies which have given a valid answer intend to hire in the next year is 1286.

		Average number of developers for companies that gave valid response(N=351)	Average number of developers planned to hire the companies which want to hire at least one (N=183)	% Developers planned to hire of total number of employees and PFA's (N=351)
Number employees / contributors	0 - 9 employees/ contributors	1	3	26%
	10 - 49 employees/ contributors	3	5	16%
	50+ employees/ contributors	26	34	14%
Total		4	7	16%

Q11. What are the benefits offered by your company to the employees?



N=395 companies



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Q12. Do you have a training budget?

Q12. What is the average sum per employee? The average is 928 RON/ employee.

N= 79. The average was calculated reported to the companies that are declaring that they have a training budget and have given a valid answer (there have been excluded the answers of NS/NR). For the calculation of the average the data were weighted regarding the number of employees and contributors.



Segmentations

Q2. What percentage represents the persons who occupy the senior level positions in the total of employees and contributors (PFA) in your company?

		Average percentage of seniors
Number employees/contributors	0 - 9 employees/contributors	27%
	10 - 49 employees/contributors	33%
	50+ employees/contributors	18%
Development region	NORTH-EAST	23%
	SUOTH-EAST	19%
	SOUTH	14%
	SOUTH-WEST	13%
	WEST	37%
	NORTH-WEST	25%
	CENTER	34%
	BUCHAREST-ILFOV	20%
Total companies		23%

N= 338. The calculations have been made only for the companies that have offered an answer to Q2 (there have been excluded from the analysis the case of do not know/ do not answer to Q2). The ratio percentage according to the number of employees and contributors.

Q3. Which are the IT technologies used by your company?

Technology	Q3 - % companies that use technology			Q4 - % the average of employees that use technology			
	0 - 9 employees/contributors	10 – 49 Employees/contributors	50 + employees/contributors	0 - 9 employees/contributors	10 - 49 employees/contributors	50 + employees/contributors	N
.NET	32%	37%	65%	49%	31%	20%	131
JAVA	44%	59%	77%	49%	37%	14%	193
C/C++	27%	42%	55%	48%	42%	12%	118
DATABASE/DATAWAREHOUSE	46%	50%	48%	64%	40%	13%	173
Web development (PHP, JS, etc)	51%	58%	58%	63%	41%	10%	198
MOBILE (iOS, Android, Windows)	56%	58%	68%	60%	37%	15%	210
UI (User Interface)/UX (User Experience)	40%	41%	45%	67%	25%	10%	144
Testing / Quality Assurance	35%	37%	45%	47%	30%	17%	133
Related developments (Business Analyst, Software Architect, Project Management)	35%	46%	55%	47%	27%	18%	137
Other technology	26%	27%	29%	36%	47%	30%	92
Personal nonIT (HR, MK, financiar, fonduri, etc)	32%	61%	61%	23%	24%	20%	143

Q3- N= 395 companies

Q4- N = the number of companies that use IT technology and have answer to Q4 (there have been excluded companies that do not use and the case of do not know/ do not answer to Q4). N is different for each technology. The ratio percentage according to the number of employees and contributors.

Q3- % companies that use some IT technology after the development region

Technology	Development region							
	NORTH-EAST	SOUTH-EAST	SOUTH	SOUTH-WEST	WEST	NORTH-WEST	CENTER	BUCHAREST-ILFOV
.NET	39%	27%	44%	23%	27%	40%	39%	36%
JAVA	54%	55%	44%	35%	55%	59%	57%	47%
C/C++	43%	46%	26%	15%	24%	33%	35%	39%
DATABASE/DATAWAREHOUSE	57%	32%	26%	46%	46%	56%	51%	44%
Web development (PHP, JS, etc)	68%	46%	39%	42%	52%	69%	59%	43%
MOBILE (iOS, Android, Windows)	68%	59%	48%	54%	52%	57%	63%	58%
UI (User Interface)/UX (User Experience)	57%	27%	39%	39%	36%	46%	41%	36%
Testing / Quality Assurance	39%	32%	30%	35%	27%	45%	41%	32%
Related developments (Business Analyst, Software Architect, Project Management)	36%	32%	39%	39%	18%	51%	47%	37%
Other technology	21%	46%	26%	27%	15%	27%	29%	25%
Personal nonIT (HR, MK, financiar, fonduri, etc)	32%	41%	39%	35%	36%	54%	47%	41%

N=395 companies

**Q5. What is, roughly, the percentage of income of the company obtains from...?
The average percentage form income obtained from...**

		Outsourcing N=303	Solutions/ own products N=319
Number employees/ contributors	0 – 9 employees/ contributors	43%	56%
	10 - 49 employees/ contributors	42%	51%
	50+ employees/ contributors	8%	69%
Development region	NORTH-EAST	39%	69%
	SOUTH-EAST	27%	71%
	SOUTH	13%	75%
	SOUTH-WEST	10%	90%
	WEST	53%	48%
	NORTH-WEST	32%	43%
	CENTER	49%	55%
Total companies		25%	61%

There have been excluded from the analysis companies with answer of do not know/ do not answer.
The ratio percentage according to the fiscal value of the company.

Q6. What are the countries your company customers are from?

Country	Number employees/contributors			Development region							
	0 - 9 employees/contributors	10 - 49 employees/contributors	50+ employees/contributors	NORTH-EAST	SOUTH-EAST	SOUTH	SOUTH-WEST	WEST	NORTH-WEST	CENTER	BUCURESTI-ILFOV
ROMANIA	78%	63%	48%	64%	86%	78%	73%	58%	64%	63%	80%
SUA	15%	18%	29%	18%	14%	9%	19%	21%	19%	22%	14%
GERMANY	10%	21%	23%	7%	0%	4%	15%	33%	20%	22%	8%
UK / ENGLAND	9%	7%	13%	14%	5%	4%	23%	3%	8%	8%	8%
FRANCE	8%	9%	10%	14%	0%	4%	4%	15%	9%	2%	10%
HOLLANDA	5%	6%	6%	18%	0%	0%	0%	3%	8%	4%	3%
SWITZERLAND	3%	9%	0%	0%	0%	0%	4%	6%	10%	4%	3%
ITALY	4%	2%	10%	0%	5%	0%	8%	6%	6%	2%	3%
BELGIUM	4%	2%	6%	18%	0%	13%	0%	3%	2%	4%	1%

There have been selected countries that are in a higher proportion in all companies. Percentage reported to the total of companies.

Q7. What is the average net salary in your company?

Q8. Have you operated wage increase or intend to operate wage increase in 2015?

Q8 1. What is the average percentage you have applied?

		Q7 – Average net salary in Lei (N=279)	Q8 - % companies that have operated/intend to operate wage growth in 2015 (N=395)	Q8_1- % average of wage growth in 2015 (N=173)
Number employees/contributors	0 - 9 employees/contributors	2573	49%	19%
	10 - 49 employees/contributors	3012	62%	13%
	50+ employees/contributors	2232	55%	13%

Development region	NORTH-EAST	2476	57%	20%
	SOUTH-EAST	1460	41%	13%
	SOUTH	1544	57%	22%
	SOUTH-WEST	2534	46%	14%
	WEST	3030	52%	13%
	NORTH-WEST	2648	63%	16%
	CENTRE	2810	61%	15%
	BUCHAREST-ILFOV	2619	45%	17%
Total		2590	53%	16%

For Q7 there have been excluded from the analysis companies that did not know or refuse to answer the question. The average net salary has been calculated by the weight average net salary declared depending on the number of employees and contributors.

Q9. Which is your company profit in percentages in 2015? But at the end of 2014?

		Company profits in 2015 (%) (N=253)	Company profits at the end of 2014 (%) (N=260)
Number employees/contributors	0 - 9 employees/ contributors	20%	18%
	10 - 49 employees/ contributors	16%	17%
	50+ employees/ contributors	11%	9%
Development region	NORTH-EAST	10%	17%
	SOUTH-EAST	13%	12%
	SOUTH	23%	21%
	SOUTH-WEST	16%	21%
	WEST	15%	13%
	NORTH-WEST	21%	21%
	CENTER	13%	12%
	BUCHAREST-ILFOV	20%	18%
Total		18%	17%

Q10. What is, roughly, the number of developers your company is intending to hire the next year?

The total number of developers which the 351 companies have given a valid answer is 1286.

		Average number of developers for companies that have given an valid answer (N=351)	Average number of developers that the companies that intend to hire at least one, intend to hire (N=183)	% developers that intend to hire for the total number of employees and PFA (N=351)
Number employees/ contributors	0 - 9 employees/ contributors	1	3	26%
	10 - 49 employees/ contributors	3	5	16%
	50+ employees/ contributors	26	34	14%
Development region	NORTH-EAST	2	3	22%
	SOUTH-ASST	1	3	14%
	SOUTH	2	6	34%
	SOUTH-WEST	3	5	14%
	WEST	1	3	15%
	NORTH-WEST	8	13	21%
	CENTER	2	4	17%
	BUCHAREST-ILFOV	3	6	10%
Total		4	7	16%

Q11. What are the benefits that your company is offering to the employees?

Benefits	Number of employees/ contributors		
	0 – 9 employees/ contributors	10 – 49 employees/ contributors	50 employees/ contributors
Food vouchers	30%	45%	74%
Full or partial food pay	17%	21%	13%
Health insurance/ private medical service subscription	31%	48%	61%
Allocation of money for practice a sport/ purchase of sport equipment	10%	20%	32%
One meal provided/ fruits at the office	22%	44%	26%
Performance bonuses	49%	64%	74%

Bonuses for recommending a person	11%	27%	29%
Bonuses for Christmas/ Easter/ Vacation	51%	68%	68%
13th salary	7%	8%	7%
Seniority bonus	12%	16%	10%
Training	49%	71%	71%
Events dedicated to employees (team buildings, Christmas party, etc.)	37%	73%	65%
Contributions to the private pensions	15%	18%	10%
Financial support for special family events (birth, deceases, marriage)	43%	55%	42%
Other benefit	9%	15%	19%

N= 395

Q11. What are the benefits that your company is offering to the employees?

Benefits	Development region							
	NORTH-EAST	SOUTH-EAST	SOUTH	SOUTH-WEST	WEST	NORTH-WEST	CENTER	BUCHAREST-ILFOV
Food vouchers	29%	23%	44%	31%	36%	38%	47%	40%
Full or partial food pay	25%	18%	17%	19%	15%	17%	20%	16%
Health insurance/ private medical service subscription	43%	32%	13%	39%	33%	43%	33%	45%
Allocation of money for practice a sport/ purchase of sport equipment	14%	5%	0%	8%	18%	24%	10%	15%
One meal provided/ fruits at the office	21%	41%	13%	35%	30%	27%	39%	27%
Performance bonuses	57%	50%	30%	54%	58%	66%	53%	53%
Bonuses for recommending a person	25%	9%	4%	8%	18%	24%	24%	14%
Bonuses for Christmas/ Easter/ Vacation	61%	59%	30%	69%	58%	60%	61%	56%
13th salary	11%	5%	0%	8%	9%	5%	16%	5%
Seniority bonus	29%	18%	4%	12%	9%	14%	18%	10%
Training	57%	27%	35%	50%	55%	70%	63%	58%
Events dedicated to employees (team buildings, Christmas party, etc.)	54%	46%	22%	39%	55%	59%	57%	47%

Contributions to the private pensions	18%	27%	4%	23%	3%	15%	22%	15%
Financial support for special family events (birth, deceases, marriage)	54%	41%	30%	50%	49%	47%	55%	43%
Other benefit	18%	0%	9%	8%	15%	14%	8%	13%

N= 395 companies

Q12. Do you have a training budget? What is the average sum per employee?

		% companies that have a training budget N = 395	Average sum pers employee in Lei N= 79
Number employees/ contributors	0 - 9 employees/ contributors	22%	1392
	10 – 49 employees/ contributors	41%	1179
	50+ employees/ contributors	52%	760
Development region	NORTH-EAST	43%	740
	SOUTH-EAST	27%	462
	SOUTH	44%	1301
	SOUTH-WEST	19%	875
	WEST	24%	2335
	NORTH-WEST	31%	578
	CENTER	28%	868
	BUCHAREST-ILFOV	28%	1809
Total		30%	928

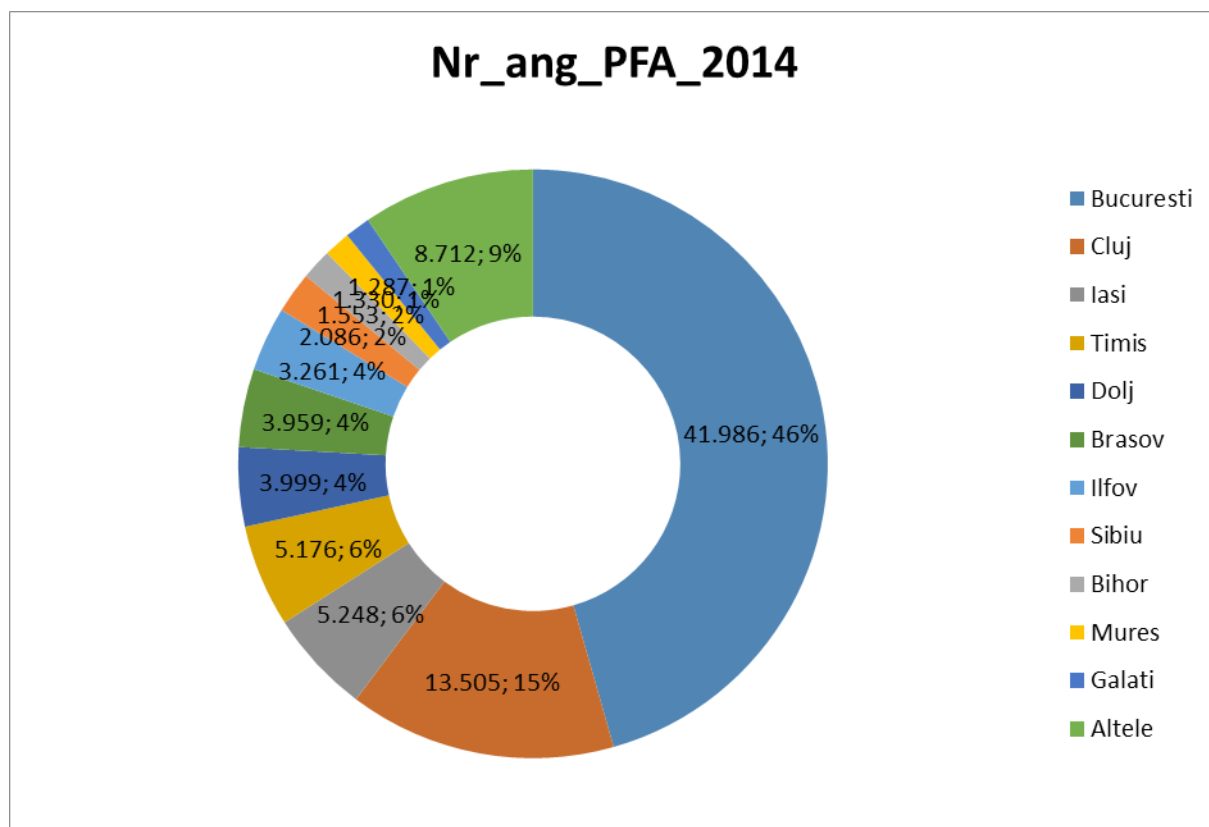
The average was calculated reported to the companies that have declared that have a training budget and have given a valid answer (have been excluded answers such as NS/ NR). For the calculation of the average the data have been weighted according to the number of employees and contributors.

How many employees and PFA's are in the Romanian IT?

The number of PFA's in the Romanian IT at the end of 2014 was 16,304. If we add the individual companies and family businesses we reach the 17 371 plus 75 495 employees in the industry.

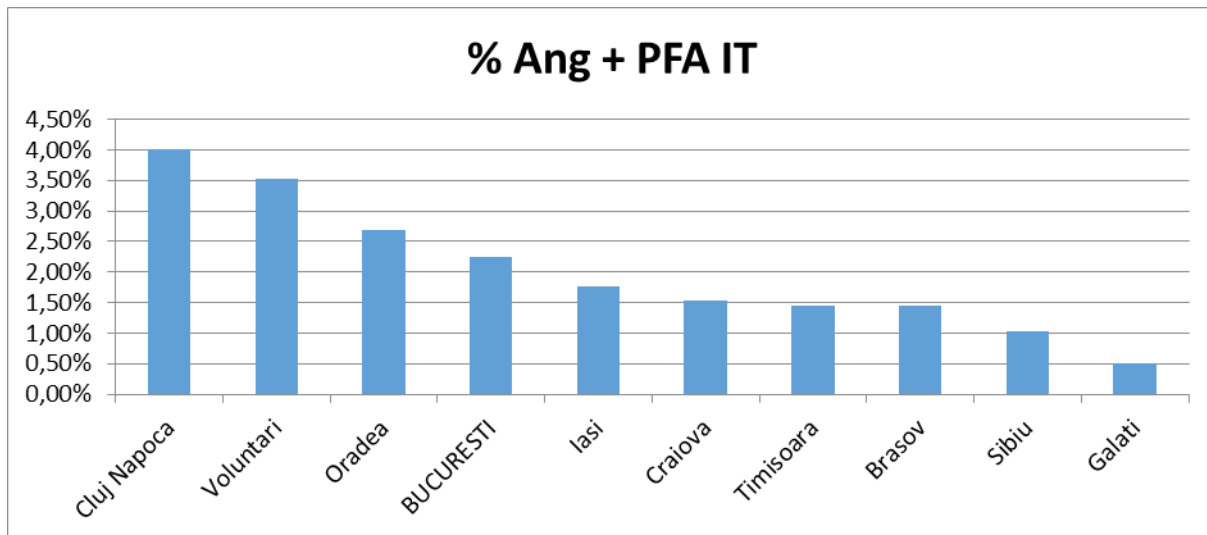
The total number of people who are hired or collaborate in the IT industry from Romania reach up to 92,866 from which 18,7% are PFA, II and IF.

According to ONRC, the number of PFA's is decreasing. At the end of October 2015, the total number of PFA+II+IF was 16,433. This is due to the political change of the state toward PFA, their regime no longer favors the companies in the industry.



Which is the IT capital of Romania?

If it is to judge **based on the number of employees and IT contributors or based on the cumulated fiscal value**, the answer is the obvious one: **Bucharest**. But if we look at the **density of specialists in IT** in the analysed cities, reported to their population, **Cluj** stands out as being the city with the largest number of IT employees per number of inhabitants, 4,00%. This means that ca. 25 of people from Cluj work in IT. Bucharest (2,24%) is only on the 4th place after Oradea (2,69%) and Voluntari (3,53%). If we take into account the large growth of Iasi, regarding the number of employees and the cumulated fiscal value in the last year, adding the fact that the density of people working in IT is under a half of the Cluj one, we can expect spectacular growth in the next years. The same argument goes for Craiova (1,54%)



What growth could we estimate for 2015?

If the sum of employees and authorized persons of the ones interviewed count 8,107 at the end of 2014, at the moment of the interviewed (30 October 2015), this sum has reach 8,757. This means a difference of approximate 8% in 8 months.

From here we can tell that **expectation is that the number of employees + PFA in IT to grow in 2015 with ca. 12%, meaning from 92,866 people to approximate 104,000 people.**

Conclusions

1. **13,737 companies activate in the IT industry in Romania.**
2. **The total number of employees at national level in IT is of 75,495 and cumulated with authorized persons this reach an estimated of 92,866 (authorized persons working in IT are cca. 19% of the IT specialists).**
3. **Bucharest is the biggest employer in the IT industry, followed by Cluj-Napoca.**
4. **Bucharest companies gather 58% of the cumulated fiscal value of the IT industry, followed by Cluj-Napoca with 11%**
5. **Iasi has the biggest annual growth as number of employees (37,05%) and also as cumulated fiscal value (67,08%).**
6. **Cluj-Napoca is the leader of IT population density reported to total population (4,00%, meaning 1 of 25).**
7. **Outsourcing represents 25% of the market.**
8. **Average net salary is approximate 2600 lei.**
9. **After Romania, USA and Germany are the biggest sale markets.**



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10. **The growth of number of employees and PFA's expected by the end 2015 is 12%.**

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