



Porsche Engineering
driving technologies

Continental

Visteon

Datanet
SYSTEMS INTEGRATION
DATATECH GROUP

Romania

Automotive Software Market



A FRD Center analysis

2019



BOSCH

Tehnică pentru o viață



Elektrobit

Introduction

This presentation is produced by **FRD Center** – www.frdcenter.ro - one of the pioneer privately owned independent market entry consulting and M&A advisory firms in Romania.

Since 2000, FRD Center offers tailor-made market research and intelligence, B2B matchmaking and M&A consulting services to foreign organisations interested to enter Romania and the emerging markets in Europe as exporters, consultants, investors or joint-ventures, to acquire a local company, to relocate their operations, to find new suppliers or to source in CE, SE and Eastern Europe.

Our services include:

-market research, investment opportunities assessment, sector studies, market briefs

<http://www.frdcenter.ro/services/market-entry-and-b2b-matchmaking-in-eastern-europe>

-B2B matchmaking: <http://www.frdcenter.ro/b2b-business-matchmaking>

- product presentation and assessment of interest from clients / partners

-M&A assistance: <http://www.frdcenter.ro/services/ma-advisory>

- identification of market opportunities: exports, sourcing, B2B sales etc.

-trade missions: <http://www.frdcenter.ro/services/trade-missions-trade-delegations-b2b-meetings>



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This is a DEMO market analysis. For tailored market analysis according to your specific needs, contact the FRD Center team at europa@frdcenter.ro

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As part of the CSR activity, FRD Center endorses the
Sibiu International Theatre Festival FITS - www.sibfest.ro

The Sibiu International Theatre Festival is the most complex festival in Romania. Internationally, it has become one of the most important performing arts festival in Europe, judging by its amplexness, dimension, and quality of events, similar to Edinburgh International Festival (Great Britain) and Avignon Festival (France)



Romania - Snapshot of the Macroeconomic Environment, 2015 - 2018

Indicator	2015	2016	2017	2018
GDP - bn RON current prices	712.6	765.1	856.7	949.6
Real GDP growth rate %	3.9	4.8	7.0	4.1
GDP per capita in PPS -Purchasing Power Standards - EU28 = 100	56	59	63	n/a
Population - million	19.861	19.760	19.638	19.524
Unemployment rate %	6.8	5.9	4.9	4.2
FDI - bn EUR	3.035	4.517	4.586	4.936
HICP - inflation rate %	-0.4	-1.1	1.1	4.1
General government gross debt, % of GDP	37.8	37.3	35.1	n/a
Net external debt, % of GDP	27.2	21.7	20.9	n/a

Sources: Eurostat, National Institute of Statistics, National Bank of Romania, National Commission for Prognosis, FRD Center

Romania – EU member since 2007

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Automotive and IT&C sectors in Romania – Market expansion and M&A

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The Romanian Automotive and IT&C sectors present numerous opportunities for M&A and investment from foreign groups and investment funds.

FRD Center is constantly monitoring the dynamics and opportunities in these sectors and generated upon-demand market analyses and target searches.

For a few details consult the FRD Center analyses at <http://www.frdcenter.ro/assets/Automotive-Manufacturing-Romania-H1-2015-DEMO-sector-brief.pdf> and at <http://www.frdcenter.ro/wp-content/uploads/2018/11/Automotive-Sector-in-CE-and-SE-Europe-H1-2018-FRD-Center.pdf>

To foreign companies interested in expanding to Romania and the region, FRD Center provides market intelligence and M&A advisory services.

More details at <http://www.frdcenter.ro/services/ma-advisory>



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Automotive manufacturing in Romania

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The Romanian Automotive Sector is one of the most dynamic in the Central Eastern Europe.

According to estimates of the local automotive producers' association ACAROM, the turnover generated by Romania's automotive manufacturing industry increased by 20% in 2018 compared to 2017, reaching some 28 bnEUR.

Two OEM automotive manufacturers – Dacia Renault and Ford – and over 400 car parts and systems manufacturers operating in Romania employ over 230,000 people.



IT and software sector in Romania

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Technology is considered a primary growth driver for the Romanian economy. The IT&C services sector is forecasted to reach EUR 6.3bn. by 2020.

Global software companies such as Oracle, Amazon, IBM already leverage the development potential of Romanian software developers at a fraction of the cost compared to Western Europe, while maintaining the product quality. Today, Romania is one of the leading countries in the region in regards to IT&C development.

Source: Invest Romania

B2B in the Automotive and IT market in Romania



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FRD Center is constantly monitoring the development of the Automotive and IT market in Romania, facilitating access of potential foreign exporters and strategic investors to the local companies' decision makers.

FRD Center assists international companies with overseas expansion and market entry to the Emerging Markets in Eastern Europe, CE and SE Europe.

Are you a foreign automotive manufacturer looking to export to the Emerging Markets in Europe? A foreign IT&C developer looking for local business partners in Romania?

Perhaps we can collaborate. ***We can facilitate your direct access to Decision Makers in relevant local companies.*** More details at <http://www.frdcenter.ro/services/market-entry-and-b2b-matchmaking-in-eastern-europe/>

As one of the pioneer privately owned market entry advisory firms in Romania, operating for 20 years, FRD Center has high competencies in market entry advisory.

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Automotive Software Sector in Romania

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Some of the international R&D and software development centers operating in Romania include:

- Porsche Engineering Romania
- Visteon Corporation center
- Continental R&D centers
- Bosch Engineering Center

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For their brief profiles continue to consult this presentation.

For more details, other automotive R&D facilities in Romania, market intelligence and target origination in the Automotive, IT and Software sectors, contact the FRD Center team at europa@frdcenter.ro

Automotive R&D Centers in Romania

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Porsche Engineering
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Porsche Engineering Romania, established in 2016 in Cluj-Napoca, is a wholly owned subsidiary of Porsche Engineering Group GmbH. Part of their expansion process, they aimed to grow to 120 employees by the end of 2018.

Besides the areas of function development and powertrain design and simulation, Porsche Engineering Romania is adding areas such as research on Big Data, autonomous driving and the development of infotainment architecture to its portfolio.



Automotive R&D Centers in Romania

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In January 2019, Visteon Corporation opened a new software development center in Romania. The Visteon center will primarily be engaged in software development for advanced cockpit electronics products – including digital instrument clusters, infotainment and information displays – and will support the development of new technologies for connected and autonomous driving.



The new Visteon technology center in Romania will employ up to 400 skilled professionals across a range of software, technology and automotive disciplines by 2020

Automotive R&D Centers in Romania

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Part of their extensive operations in Romania, the Continental develops software and innovative products for the automotive sector, such as interconnectivity apps, apps for efficiency and consumption.

The company operates several automotive R&D centers in Romania - all of them are developing quite rapidly. For example, the Continental research and development centre in Iasi has grown from 30 people in 2006 to over 1,900 at the end of 2018



Automotive R&D Centers in Romania

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Bosch, a leading supplier of technology and services, has a strong presence in Romania for over 25 years. The company has expanded its research and development activity in Romania in the last five years. Bosch Romania develops state-of-the-art products in software, hardware, reliability and mechanical engineering.



With an investment of some 25 mEUR, in 2018, Bosch started the construction of its new engineering center in Cluj-Napoca, central Romania.

Bosch opened its engineering center in Cluj-Napoca in 2013 and currently has some 400 employees.

Automotive Software System Integrators and Developers in Romania

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According to the FRD Center research, some of the SIs and software developers also in the automotive sector operating in Romania include:

- NTT Data Romania
- Expleo Romania
- Datanet Systems
- Elektrobit Automotive Romania

NTT DATA

(expleo)

EB Elektrobit



For an analysis of their recent dynamics continue to consult this presentation.

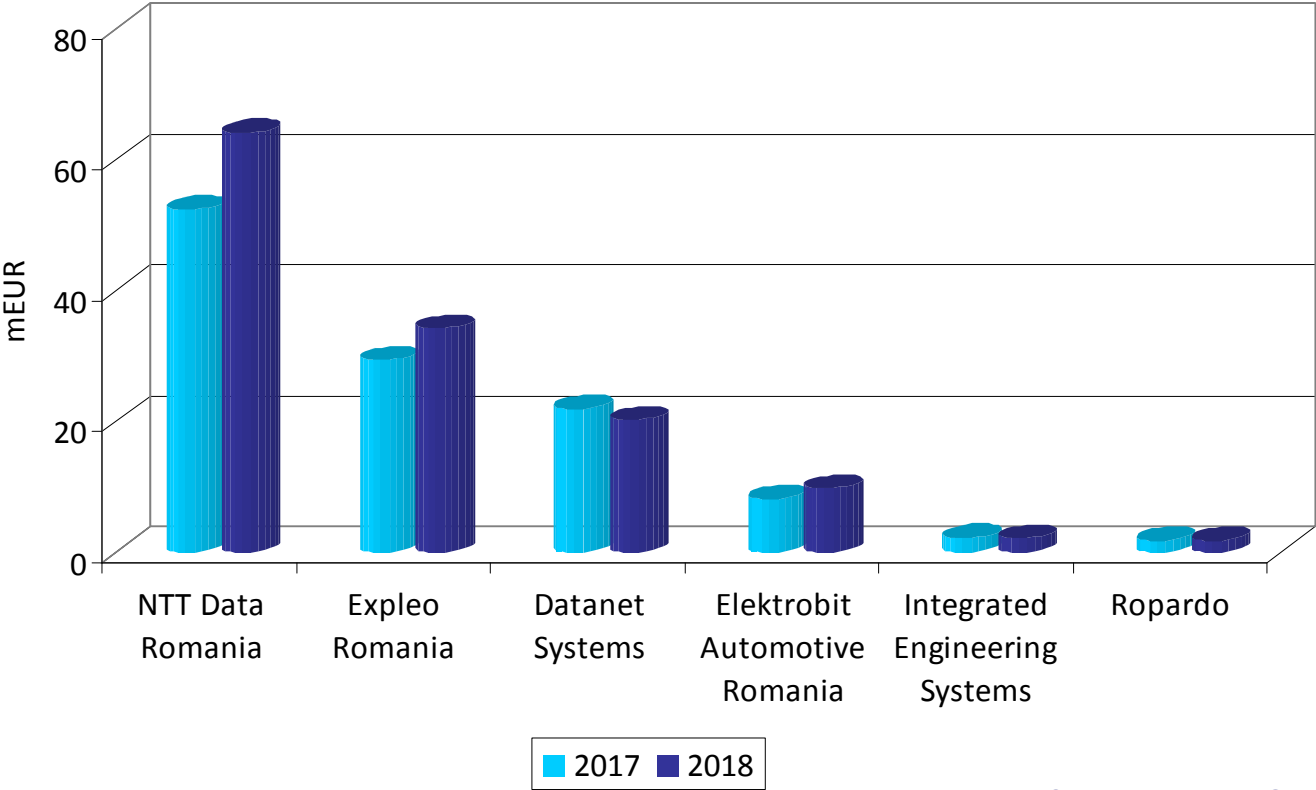
For more details, other automotive SIs and software developers in Romania, market intelligence and target origination in the Automotive, IT and Software sectors, contact the FRD Center team at europa@frdcenter.ro



Analysis of the Automotive Software System Integrators and Developers in Romania



Turnover dynamics of automotive SIs in Romania



Source: FRD Center, Finance Ministry



Automotive Manufacturing sector in CE Europe



FRD Center is closely monitoring the developments of the Automotive Manufacturing sector in CE Europe.

For specific details, consult the following business blog postings by FRD Center:

Auto Components and Spare Parts Production in CE and SE Europe: <https://market-entry-romania.blogspot.com/2018/04/auto-components-and-spare-parts.html>

Investments in the Automotive Manufacturing Sector in Emerging Europe: <https://market-entry-romania.blogspot.com/2018/08/recent-and-announced-investments-in.html>

Romanian Automotive Manufacturing Sector registers fastest advance in 7 years: <https://market-entry-romania.blogspot.com/2019/02/romanian-automotive-manufacturing.html>

Industrial Manufacturing in Emerging Europe: <https://market-entry-romania.blogspot.com/2019/03/industrial-manufacturing-in-emerging.html>

Market Entry with FRD Center





For tailored market research, B2B matchmaking with local players in the sector, deal origination and M&A assistance feel free to contact

Jackie BOJOR, Director

FRD Center Market Entry Services
Str. Orzari 5, Bl 46bis
Bucharest, Romania

Tel: +4021 411 1460 or +4021 411 1461

Skype: FRDCenter

e-mail: europa@frdcenter.ro

www.frdcenter.ro