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PART 23/27

COMMISSION STAFF WORKING DOCUMENT

Digital Decade 2026 country report

Accompanying the document

COMMUNICATION FROM THE COMMISSION TO THE EUROPEAN PARLIAMENT, THE COUNCIL, THE EUROPEAN ECONOMIC AND SOCIAL COMMITTEE AND THE COMMITTEE OF THE REGIONS

State of the Digital Decade 2026: Closing structural gaps and mobilising investments for 2030 and beyond

{COM(2026) 288 final} - {SWD(2026) 154 final} - {SWD(2026) 156 final} - {SWD(2026) 157 final}

European Commission

DIGITAL DECADE COUNTRY REPORT 2026

Romania

Romania

Contents

Executive summary

Romania continues to be an EU leader in connectivity, has strengthened its position in semiconductors and is signalling its ambition to become an AI regional leader. However, limited access to finance, particularly venture capital, low research and development (R&D) spending and a sluggish digital startups ecosystem limit its competitiveness. While digital public services have clearly progressed, the focus must now shift to delivering value-for-investment for citizens and businesses by meeting their needs for streamlined administrative procedures and continuously improved services. Despite progress, particularly for civil servants, challenges remain in tackling low-level digital skills.

The structural gaps in digital skills and the limited availability of digital public services create a **competitiveness ceiling** for Romania. The efforts in connectivity, AI and semiconductors may be undermined by a startup sector that struggles to grow in the absence of widespread access to finance and insufficient stimulation of home-grown innovation. To go from being a regional tech outpost to a true digital leader, Romania must bridge the gap between its infrastructure strengths and its ecosystem weaknesses. To do this, Romania **requires a comprehensive digitalisation strategy** backed by strong political will, sustainable post-Recovery and Resilience Facility (RRF) funding, a coherent regulatory framework, strong ICT expertise and a well-defined governance structure.

RRF funding has been used to kickstart key high-growth sectors that could help Romania become a **digital** leader, such as semiconductors and AI. By modernising universities and creating industrial ecosystems linked to the country's industrial strengths, in particular the auto industry, Romania can capitalize on key growth opportunities. The upcoming AI factory and planned Black Sea AI gigafactory could further strengthen Romania's and the EU's digital sovereignty.

With RRF funding winding down, Romania must define its priorities moving forward and make full use of all **funding** opportunities in the next Multiannual Financial Framework (MFF), in particular the national and regional partnership plans (NRPPs) and the Digital Leadership instrument.

Romania in the Digital Decade

Romania shows a low level of ambition in its contribution to the Digital Decade, having set 11 national targets (out of 14 possible), 36% of which are in line with the EU 2030 targets. In its national roadmap, Romania provided 1 trajectory point for 2025 (out of 13 analysed). The country is following it very well as it is considered on track. Romania addressed 50% of the 8 recommendations issued by the Commission in 2025 by making some changes through new measures. According to the national roadmap, by the end of 2026, 38% of the measures will come to an end. The total public budget for these measures is EUR 2.31 billion, representing 64% of the total public budget outlined in the roadmap.

Romania did not submit an update of its national Digital Decade roadmap in 2025 but is planning to do so in 2026 to take stock of performance so far and adapt its projections and targets based on national priorities.

According to the 2026 Digital Decade Eurobarometer, 59% of Romanian people think that digital policy should be a high/very high priority for the EU in shaping the future. They also think that in the next 10 years the EU should cooperate with Member States to strengthen cybersecurity and protection from online threats (74%), promote digital education and skills programmes (71%) and strengthen the regulation of online platforms (71%). In addition, 64% of Romanian respondents think that the EU should reduce its dependencies on digital from non-EU countries, and 69% agree that it should prioritise investments in digital infrastructure and services developed and controlled in Europe. Meanwhile, 49% would be willing to switch to an EU-based digital service provider even if it means slightly higher costs.

Funding for digital and multi-country projects

Romania allocates 21% of its total recovery and resilience plan to digital (EUR 4.5 billion). Under cohesion policy, EUR 3.2 billion, representing 10% of the country's total cohesion policy funding, is also dedicated to advancing Romania's digital transformation.

Romania is a member of the EUROPEUM EDIC. Romania is directly participating in the IPCEI on Microelectronics and Communication Technologies (IPCEI-ME/CT). Romania is also a participating state in the EuroHPC Joint Undertaking (JU) and of the Chips JU.

	Romania				EU		Digital Decade target by 2030	
Digital Decade KPI (1)	Latest available data (2)	DESI 2026 (year 2025)	Annual progress	National trajectory 2025 (3)	DESI 2026	Annual progress	**RO**	**EU**
Fixed very high-capacity network (VHCN) coverage	95.9%	96.5%	0.6%	-	85.5%	3.7%	99.0%	100%
Fibre to the premises (FTTP) coverage	95.7%	96.3%	0.5%	-	74.1%	7.1%	99.0%	-
Basic 5G coverage	46.8%	59.3%	26.8%	38.0%	96.8%	2.6%	62.0%	100%
Edge nodes (estimate, new methodology)	-	252		-	7 451		-	10 000
SMEs with at least a basic level of digital intensity	26.8%	44.3%	28.7%	-	71.4%	11.0%	75.0%	90%
Cloud*	15.5%	22.1%	19.4%	-	46.7%	9.5%	40.0%	75%
Artificial Intelligence	3.1%	5.2%	69.7%	-	20.0%	48.0%	10.0%	75%
Data analytics*	21.9%	35.1%	26.6%	-	39.9%	9.5%	15.0%	75%
AI or Cloud or Data analytics*	28.7%	43.6%	23.1%	-	63.2%	7.5%	-	75%
Unicorns	0	0		-	324	10.2%	-	500
At least basic digital skills*	27.7%	31.8%	7.2%	-	60.4%	4.3%	50.0%	80%
ICT specialists	2.8%	2.7	-3.6%	-	5.0%	2.0%	4.0%	~10%
e ID scheme notification		Yes					-	
Digital public services for citizens	62.7	64.2	2.4%	-	84.6	2.8%	100.0	100
Digital public services for businesses	55.1	66.8	21.2%	-	88.6	2.7%	100.0	100
Access to e-health records	75.1	75.1	0.0%	-	86.5	4.6%	-	100

(1) Indicators full description, metadata and sources in the DESI 2026 methodological note
(2) Last available data is DESI 2025 (ref year 2024) except for indicators marked with a star for which it is DESI 2024 (ref year 2023)
(3) National trajectory value for 2025, if set by the country in its Digital Decade national roadmap

A competitive, sovereign and resilient EU based on technological leadership

Romania remains an EU leader in terms of **connectivity**, ranking first in the EU for fibre to the premises (FTTP) coverage for both businesses and consumers. Despite very strong year-on-year growth in 5G connectivity, Romania continues to rank last in the EU. More could be done to showcase how 5G connectivity could support manufacturing businesses and B2B interactions.

Romania

Romania has continued to strengthen its position in **critical technologies**. It is participating in the IPCEI on microelectronics and communication technologies. Additionally, Romania will host an AI factory and has submitted a bid to host an AI gigafactory.

Romania does not have an ICT or digital **unicorn**. Its startup ecosystem struggles with access to finance and the availability of risk capital. The country has a high ICT potential, which could benefit from further removal of legislative and administrative obstacles that affect rapid business development and innovation.

Protecting and empowering EU people and society

Romania has invested considerable resources in **digitalising public services**, so far focusing mostly on securing the necessary hardware and data centres needed for the governmental cloud. Good progress has been made on eID, digital signatures and improving overall digital interactions with the state. Next Romania must show what this high level of investment was for, by providing clear, easy-to-use digital services for companies and people. **Digitalisation of the health sector remains problematic**. New initiatives to digitise the activity of the Health Ministry and launch an upgraded health insurance platform are promising. These are much needed developments, as the sector lags significantly behind.

Despite progress, Romania continues to rank last in the EU for **basic digital skills**. Measures have been put in place to increase the advanced digital skills of public sector employees. However, support for people already employed by the private sector remains limited. Romania has a high number of **ICT graduates** but continues to struggle with talent retention. The public sector struggles in engaging with the high level of ICT talent in the country. More could be done to encourage flexible cooperation between public and private sectors, including for upskilling and lifelong learning.

Recommendations

Digital public services: establish a unified multicloud ecosystem by interconnecting the **Governmental cloud** and sectorial cloud infrastructures. To fully **implement the once-only principle**, the National Platform for Interoperability must be operationalized to facilitate seamless data exchange across state applications. Leverage ROePAS as the primary access point under the Single Digital Gateway Regulation. Launch the Governmental cloud marketplace in order to leverage agile private solutions to address public service needs. It should develop the **national EU Digital Identity wallet solution** and should expand the use of **advanced electronic signatures** for citizens and especially SMEs for non-fiscal administrative procedures. These foundational infrastructures should be leveraged to further digitalise key sectoral domains, including tax administration, business licensing, and the judiciary.

E-health: Adopt the national strategy for digital health and turn it into legally binding measures. Operationalise and adequately fund the modernised national health insurance platform (PIAS), develop a mobile application to access e-health records and establish incentives to increase the use of digital solutions in healthcare, ensuring equitable access across different socio-economic backgrounds. Make additional types of data available and improve authentication methods using a compliant eID solution. Support participation in the Network of AI-Powered Advanced Medical Centres, for example, by establishing co-funding schemes for piloting and deploying AI solutions in clinical environments, in line with existing measures in the national AI Strategy.

Skills: Boost **basic digital skills** as a core component of the education process, both for teachers and students. Do more to train teachers on integrating digital tools in teaching practices and explore ways of rewarding those who do using the teacher evaluation system. Continue the digital upskilling of public sector employees and make adult learning, particularly of employees in the private sector and older people, a policy priority. In this respect, Romania could look into the possibility of directly rewarding employees by means of individual learning accounts, linked to the digital wallet, with training possible only with providers certified under the Romanian Digital Competence Framework (DigCompRo). To retain **skilled ICT workers and graduates,** ramp up dual pathway university degrees, including by incorporating R&D into European Credit Transfer System (ECTS) credits.

Digitalisation of businesses: further strengthen support to innovative **startups and scaleups** through Startup Nation and the new Innovation Romania Holding Fund. Actively involve stakeholders in defining the financing priorities and performance-based milestones that will be used to measure performance under the next MFF. Identify ways of rewarding Romanian intellectual property (IP)solutions. Leverage Romanian European Digital Innovation Hubs (EDIH)'s capabilities to increase the digital maturity of local and regional SMEs. Define clear institutional roles in **AI** and leverage the upcoming AI factory and the potential AI gigafactory to pivot from outsourcing to home grown players that use AI to provide industrial scale solutions in key economic areas of strength.

Cybersecurity: Provide support for all relevant entities, such as specific guidance or dedicated ICT platforms and automation tools, to ensure that cybersecurity rules are applied consistently across all sectors. Focus on helping digital public services and SMEs adopt cybersecurity measures that are effective and balanced.

5G: embed 5G regional and local connectivity targets in the new national and regional partnership plans (NRPPs). Focus on increasing 5G coverage, including in the 3.4-3.8GHz band, and spectrum assignment, subject to market demands and investment envelopes. Uphold commitments to phase out fiscal burdens on telecom operators and make information on local construction works permitting more transparent (by setting up a digital permitting portal for example). Promote the deployment of 5G standalone networks while identifying ways of stimulating demand for 5G.

A competitive, sovereign and resilient EU based on technological leadership

Building technological leadership: digital infrastructure and technologies

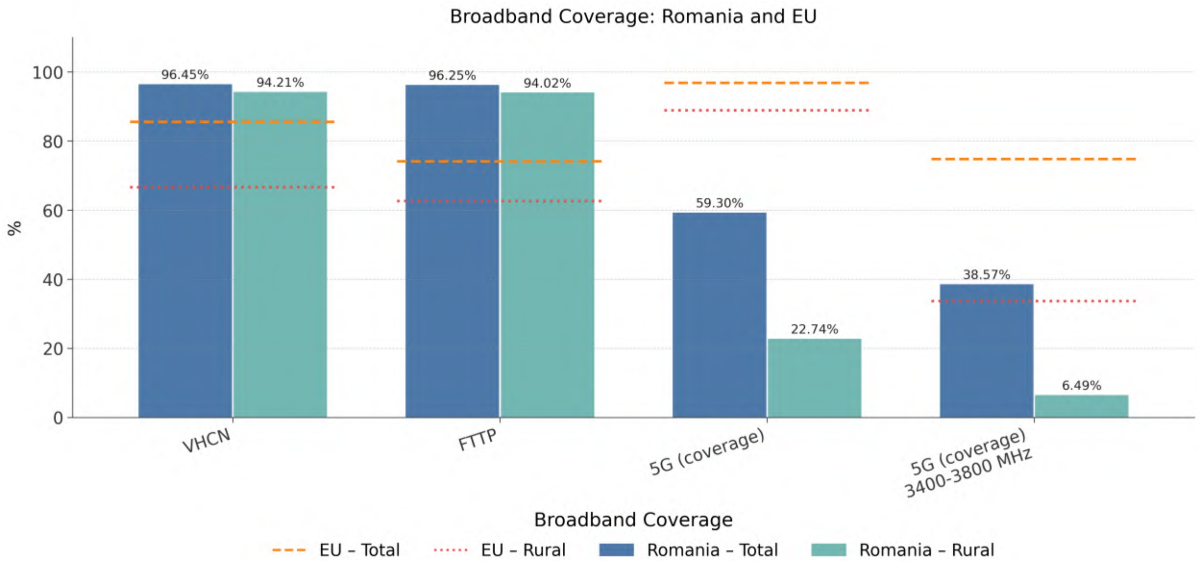
Connectivity infrastructure

Performance assessment

Romania achieved a coverage rate of 96.45% for very high-capacity networks (VHCN) in 2025, higher than the EU's 85.54%, with an increase of 0.6% from 2024. Romania clearly outperforms the EU in VHCN coverage in sparsely populated areas, with 94.21% in 2025 (EU 66.66%). Romania increased its coverage by 0.6% compared to 2024.

Romania's fibre-to-the-premises (FTTP) coverage has increased to 96.25% (+0.5% since 2024), significantly above the EU average of 74.13%. In sparsely populated areas, its FTTP coverage was 94.02% in 2025, much higher than the EU average of 62.61%. Its annual growth rate was 0.6%, lower than the EU's (6.5%), which is normal considering its very high starting point.

In 2025, Romania's 5G coverage was 59.3% in 2025, well below the EU average of 96.79%. Its annual growth rate of 26.8 % significantly outpaced the EU's (2.6%), but Romania continues to rank last among EU Member States. In sparsely populated areas, Romania's 5G coverage was 22.74% (EU average 88.88%). Its coverage in the 3.4–3.8 GHz mid-band was 38.57%, well below the EU average of 74.75%. This 3.4-3.8 GHz mid-band provides a good balance between coverage and high capacity, making advanced 5G use cases possible in manufacturing, such as the industrial Internet of Things, or healthcare, in telemedicine for example. In sparsely populated areas, Romania's coverage in this band was 6.49%, much lower than the EU average of 33.71%. Nevertheless, the country is on track for overall 5G coverage according to the trajectory presented in the Digital Decade national roadmap. Significant investments in 5G networks have also been earmarked by some of the largest telecom operators.



In terms of take-up, Romania is still in the EU's top 5 in terms for the share of fixed broadband subscriptions > 1 Gbps in the total fixed broadband connections. It is at 36.64% in 2025, above the

EU average of 26.97%. This represents an annual growth rate of 7.2% for Romania, compared to the EU's 21.2%.

Romania reached 21.64% of its total population having 5G SIM cards in 2025, an increase of 44.2% from 2024. It remains below the EU average of 55.55% (the EU annual growth rate was 56.2%).

The table below gives an overview of VHCN, FTTP and 5G coverage across NUTS-2 regions in Romania. It confirms Romania's high level of VHCN and FTTP connectivity, with virtually no differences between regions. The national coverage average for 5G is strongly influenced by the performance of the Bucuresti-Ilfov region. All other regions except Centru and Vest are under the national average.

	VHCN coverage		FTTP Coverage		5G Coverage	
	Overall	Rural	Overall	Rural	Overall	Rural
National coverage	96.45%	94.21%	96.25%	94.02%	59.30%	22.74%
Bucureşti-Ilfov	97.95%	94.74%	97.79%	94.66%	99.80%	98.24%
Centru	94.61%	92.39%	94.26%	92.15%	61.94%	33.29%
Nord-Est	97.50%	95.54%	97.37%	95.37%	49.09%	17.68%
Nord-Vest	95.16%	92.70%	94.98%	92.58%	57.42%	23.20%
Sud-Est	94.70%	91.14%	94.64%	91.07%	55.56%	15.87%
Sud-Muntenia	97.04%	96.53%	96.75%	96.32%	48.91%	24.10%
Sud-Vest Oltenia	98.35%	97.82%	98.14%	97.53%	43.09%	15.87%
Vest	96.12%	92.18%	95.89%	91.95%	64.09%	23.65%

Policy context and assessment of recommendations

The main **telecoms market** development in Romania has been the finalisation of the acquisition of Telekom Romania by Vodafone Romania (who took over postpaid and business segments, the retail network, and technical infrastructure) and Digi (who took over the prepaid segment and spectrum assets). Following this acquisition, the Romanian mobile telecom market now has a tripartite structure (Orange, Vodafone and Digi).

The approval of the transaction was contingent on a package of market competition related commitments, including pricing and impact on quality of service. These include guaranteeing mobile virtual network operators' access to the Vodafone and Digi networks at competitive market prices, as well as the continuation of investment in service quality and network development (particularly along Trans European Network - TEN-T - corridors and for underserved 'dark spots').

Regarding **copper switch-off**, the Romanian national regulatory authority plans to update figures in 2026. Data from 2023 indicates that copper wire coverage was relatively low (around 35% of addresses). The assessment for 2025 suggests a significant drop in numbers in relation to the overall copper wire coverage (less than 1%) as the copper switch off process accelerated.

As of 2025, new electricity backup requirements for networks entered into force, meant to improve general electronic communications service availability and strengthen the resilience of electronic communications networks.

Romania announced the **Black Sea Submarine Cable project**, which will establish parallel electricity and fibre-optic submarine cable interconnections across the Black Sea, with landing points in Georgia and Romania, strengthening internet connectivity between the EU and the Caucasus. In parallel, the EU-funded Balkans Digital Gateway Works (BDGW) project (2025 - 2028) supports the deployment of high capacity backbone infrastructure between Romania, Bulgaria and Greece and facilitates the integration of submarine and terrestrial networks at key landing points on the Black and Aegean Seas. These initiatives are expected to contribute to better redundancy, security and regional interconnectivity. Romania could continue to look into the developing such projects, as well as improved cross-border coordination and risk preparedness, to support the resilience and security of connectivity infrastructure in the Black Sea basin.

Romania is one of the EU leaders in fixed and 4G connectivity, but **it continues to underperform in 5G coverage, 5G in the 3.4-3.8 GHz mid-band and 5G SIM card adoption. The situation has improved**, as the national regulator indicates that [5G connections exceeded 4 million for the first time in 2025](), but the country continues to have significant potential to improve its performance (5G connections account for 7% of total mobile internet traffic).

Consolidation of the mobile market means **more spectrum has been made available, which could increase the pace of 5G infrastructure installation.** The licences for the 3.4–3.8 GHz mid-band have also officially entered into their long-term validity period (22 years), with auction winners expected to cover with broadband services at least 70% of the country's population, most urban areas, highways, international airports and modernised railways, as well as 240 settlements identified as not covered or poorly covered with mobile communications services, using the full spectrum of portfolios held. Upcoming licences expirations in 2029 (800 MHz, 900 MHz, 1800 MHz, 2600 MHz) and 2031 (2100 MHz) could be used to introduce pro-investment conditions[1].

Most of the limited 5G coverage can be explained by market forces. Most main cities and some metropolitan areas have 5G coverage, but demand remains low overall, as the existing fixed and mobile infrastructure seem to cover the connectivity needs of people and businesses (the average download speed over the current network is around 90Mbps). Certain pilot projects have been implemented, for example by telecom provider Orange ensuring 5G access in the Danube Delta, an area of Romania historically underconnected, but more investment is needed to ensure national coverage. The national regulator is also consulting on market needs in 2026 to identify whether there is interest in the 26 GHz and 42 GHz bands, but it has indicated that no additional spectrum requests were received in 2025. The last spectrum auction was in 2022.

Besides market needs, market operator investments in telecom in general and 5G infrastructure specifically are affected by **cumulative fiscal requirements** (turnover and special constructions tax), diverging local permitting rules, and infrastructure security requirements (driven by the need to replace high risk vendor equipment in core networks). The Romanian Government has announced that the turnover tax will be decreased in 2026 and eliminated, together with the special construction tax, in 2027. However, fiscal measures have a high degree of unpredictability in Romania, making it hard for companies to plan medium-term investments based on such announcements.

Primarily, 5G is a solution for businesses and represents a crucial opportunity to modernise core economic drivers such as manufacturing and agriculture in Romania. **There is clear scope for the public sector to collaborate with industry stakeholders and European Digital Innovation Hubs (EDIHs) to identify high-impact use cases to show how 5G can lead to more efficient processes.** The feasibility of implementing already existing best practices, such as the German model of local spectrum licensing or the Estonian or Spanish 5G sandboxes to provide a low-risk environment for SMEs to 'test before they invest' should also be analysed.

[1] Pro-investment conditions include longer licence durations to strengthen investment certainty, coverage obligations to accelerate deployment and reasonable spectrum prices that preserve capital for network rollout.

Romania

2025 recommendation on connectivity infrastructure: increase overall 5G coverage, including in the 3.4–3.8 GHz band, and spectrum assignment, subject to market demand.

In 2025, Romania continued to implement of existing measures but did not take any new ones. Romania has made very good progress in improving 5G coverage, getting close to reaching its 2030 target of 60% of total households' coverage. Nevertheless, Romania continues to rank last in the EU in both 5G and 5G in the 3.4-3.8GHz mid-band and no spectrum auction has taken place since 2022.

Semiconductors

Romania has taken significant steps to reach its national recovery and resilience plan (NRRP) milestone regarding the development of a **semiconductor industry**. The milestone focused on Romania's participation in the Important Project of Common European Interest (IPCEI) on "Microelectronics and communication technologies" (ME/CT). 23 financing contracts were signed for both direct and indirect participants, with over EUR 375 million in investments committed through European funds.

Each of the three direct participants (Continental, Bosch and NXP) are now in the active R&D phase. NXP has expanded its R&D footprint in Bucharest and Sibiu, focusing on 'System on a Chip' (SoC) designs for automotive radar and 5G/6G communication. Continental is developing energy-efficient processors for autonomous driving and "smart" car systems, while Bosch is focusing on the microelectronics value chain for highly automated driving and green mobility.

Romania, through the Politehnica University, is also part of the NanoIC microelectronics initiative. The initiative, with a total investment of EUR 2.5 bn, is aimed at accelerating the development of next-generation semiconductor technologies for applications including AI, autonomous vehicles, healthcare and 6G communications. Romania will contribute to the project with advanced equipment and research expertise from the university's nanotechnology labs.

Edge nodes

Performance assessment

According to the Edge Node Observatory, Romania had 252 edge nodes deployed at the end of 2025. As the Observatory uses a new methodology, this figure cannot be compared to the previous reporting period. The country has surpassed its 2030 target of 113 edge nodes included in the national roadmap.

There is no known involvement of public authorities (public policy or coordination group) in promoting and developing edge nodes.

Quantum technologies

IBM and the Iasi Technical University have set up a Quantum Innovation Centre in Romania, in the city of Iasi. The aim of the centre is to train professionals in quantum computing and its use in areas such as medical research, cryptography and AI. The initiative will be integrated into Romania's broader quantum ecosystem, complementing the work done in quantum communications (as part of RoNaQCI—Romania's National Quantum Communications Infrastructure).

Supporting EU-wide digital ecosystems and scaling up innovative enterprises

Romania

SMEs with at least basic digital intensity

Performance assessment

In Romania, 44.34% of SMEs (10 to 249 employees) had at least a basic level of digital intensity in 2025, well below the EU average of 71.39%. Romania's annual growth rate (+28.7% annually between 2023 and 2025) significantly outpaces the EU's 11% growth rate for the same period, indicating a positive trend in the digitalisation of Romanian SMEs. In the case of SMEs with a very high digital intensity index, Romania's performance remains modest. In 2025, only 2.42% of Romanian SMEs had a very high digital intensity index, which is below the EU average of 9.07%.

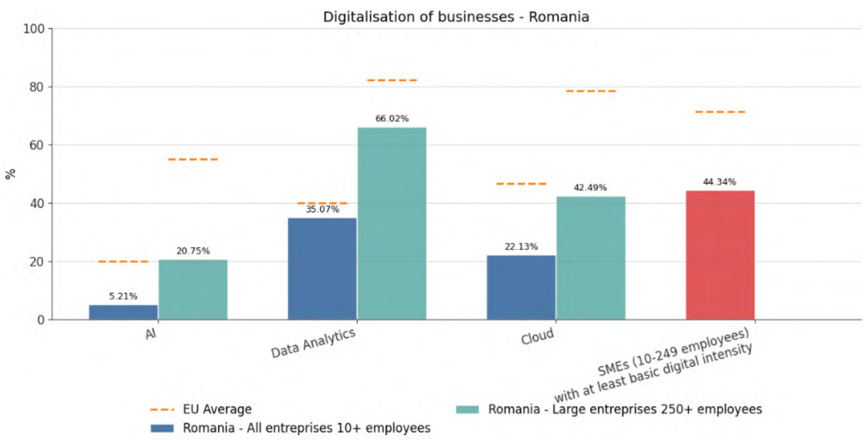
Policy context and assessment of recommendations

According to a study by the National Bank of Romania, the majority of Romanian companies that have invested in digitalisation in the past five years have indicated that the main obstacle is the high cost of investment for infrastructure, software, maintenance and cybersecurity. Other obstacles included limited access to finance, a lack of skills and the continuous nature of digitalisation investment to keep up with the pace of technological development.

Nevertheless, Romanian SMEs do recognise the need to incorporate digital technology into their activities, even though they struggle with integrating digital business models into their core operations. For example, according to the IMM Digital Index 2025, 60% of Romanian SMEs have a website and 77% have social media accounts, but only around 22% sell goods or services online.

Take-up of advanced technologies

Performance assessment



In 2025, 35.07% of Romanian enterprises took up data analytics technologies (annual increase of +26.6% since 2023), slightly below the EU average of 39.85%. Nevertheless, Romania has caught up significantly since 2023, when data analytics take-up was at 21.87% (2023 EU average 33.25%).

5.21% of Romanian enterprises took up AI technologies in 2025, a figure well below the EU average of 19.95%. Romania has improved by +69.7% annually since 2024 (EU average +48.0%), but there is still significant room for improvement.

22.13% of Romanian enterprises adopted cloud technologies in 2025 (annual increase of +19.4% since 2023), which is well below the EU average of 46.69%. Romania's annual growth rate is double the EU's growth rate of 9.5%, indicating good convergence.

Romania

When considering the three technologies together, 43.57% of Romanian enterprises used with either AI, cloud or data analytics technologies in 2025, well below the EU average of 63.2%. Romania's annual growth rate was 23.1%, significantly higher than the EU's 7.5%.

Policy context and assessment of recommendations

Romania has announced highly ambitious plans for developing its **AI capabilities**. It will host an **AI factory**, including the acquisition of an AI-optimised supercomputer, which should give startups, SMEs, and industry direct access to AI capabilities and tailored support to develop and deploy advanced AI solutions. With a total estimated budget of EUR 50 million for five years, the Romanian AI Factory will be hosted at the National Institute for Research & Development in Informatics (ICI) Bucharest data centre and be built in partnership with technical universities, industry and Romanian digital hubs.

Romania has also put in a bid to host the **Black Sea AI gigafactory**, which, if successful, could turn the country into a world-class AI hub. Planned to be powered by up to 1,500 MW of zero-emission energy, primarily nuclear, the gigafactory, with an estimated cost of between EUR 4 and 5 billion, would serve both the national and neighbouring markets, creating a regional AI and cybersecurity ecosystem, training large European AI models and improving digital sovereignty. In the Memorandum announcing the bid, Romania also indicates that if financing from the EuroHPC JU were forthcoming, the project would not be abandoned, but adjusted to be financed by private investors, using World Bank support.

Romania has an AI Strategy, adopted in 2024, with 128 measures for which 36 institutions are responsible. The oversight of the implementation is done by an inter-ministerial committee, chaired by the Minister of the Economy, Digitalisation, Entrepreneurship and Tourism. Investing in AI could be of great benefit to the Romanian economy. A McKinsey report estimates that the rapid take-up of AI could add a cumulative EUR 30bn to EUR 50bn to Romania's GDP by 2040 and annual public sector productivity gains of up to EUR 1bn. At the same time, however, it could put a lot more pressure on labour, particularly for junior developers who risk seeing themselves squeezed out of the job market.

To better adapt to the challenges of new technologies, the academic sector in Romania is also introducing new programmes, financed by the NRRP, to bridge the gap between higher education and evolving market requirements (see the section on ICT specialists below).

In the case of **cloud computing**, the main public discussion has been around the development of the governmental cloud project, a EUR 500 million NRRP-funded initiative (see below in the 'Key digital public services and solutions' section).

Private cloud initiatives are also expanding rapidly, primarily spurred by AI development and energy-driven projects. The largest concentration of data centres is around Bucharest (around 30). The biggest hyperscale data centre is planned in southwest Romania, with a planned operational capacity of 200 MW. The largest electricity distribution company in Romania has also announced plans to expand its activities in data centres. A study by Mordor Intelligence forecasts that the data centre market will grow annually by approximately 20% between 2026 and 2031.

Unicorns, scale-ups and start-ups

Romania continues to not have a digital unicorn. Additionally, available figures indicate that total investment volume in 2025 dropped by 20% compared to 2024.

Access to finance continues to be a significant issue, with a large percentage of companies relying on internal financing to support investments (51% in 2025 compared to 58% in 2023[2]). Romania supports

[2] Carta alba a IMM-urilor din Romania 2025

startups through government frameworks such as Start-Up Nation and the Woman Entrepreneur *de minimis* scheme.

The current Start-Up Nation programme (2024–2026) introduces a EUR 450 million budget focused on mandatory training and offers grants of up to approx. EUR 50,000 for new businesses. While the program is well advertised and known in Romania, it is often criticized for its complex application procedures and a narrow focus on low-digital intensity businesses, leaving a gap in support for companies looking to scale up beyond the initial phase.

In addition to financial support programmes, non-financial support mechanisms such as digital information and mentoring platforms contribute to strengthening entrepreneurial capabilities, facilitating access to information and supporting the uptake of digital solutions by SMEs.

The Innovation Romania Holding Fund also became operational in 2025. Managed by the European Investment Fund and funded through the POCIDIF programme[3], it has a budget of around EUR 107 million targeting early-stage financing gaps in the Romanian ecosystem by supporting technology transfer, early-stage startups and co-investment.

Overall, the Romanian tech sector is still mostly dominated by ICT specialists working for international companies in outsourcing jobs, seen as a safer choice than the high risk and high initial investment costs of creating a startup. R&D spending in Romania is the lowest in the EU and there are fears about the sustainability of digital investments as RRF funding is winding down. In 2026, Romania introduced a 10% refundable R&D tax credit that could give a significant advantage to startups by making it possible for R&D investments to be recovered during their pre-revenue phase. This incentive could also be used to encourage companies to register and maintain intellectual property (patents and software copyrights) in Romania.

Efforts to improve access to financing programmes for startups and SMEs need to continue to be coordinated with European Digital Innovation Hubs (EDIHs) in Romania. EDIHs could serve as a primary feedback loop for national funding bodies to define financing priorities based on real-world technology gaps, in particular at regional and local level. By integrating lessons learned from direct company support, EDIHs can help policymakers identify 'quick digital wins', high-ROI tools like basic AI integration or automated data workflows, which are applicable across a variety of sectors. This would enable the available limited funding to go beyond addressing initial company digitalisation needs and target digital innovation, for example by integrating technology into the business model, internal processes and supply chain management. EDIHs could also pinpoint the administrative obstacles that currently discourage SMEs from applying, ensuring that future funding calls are more streamlined and accessible to the companies that need them most.

Besides funding, stronger intellectual property support would enable Romania to move away from outsourcing (exporting code) to home-grown solutions that can be scaled up.

2025 recommendation:

Unicorns: Building on existing programmes, Romania should identify ways to support company scale-up and diversify funding opportunities for innovative companies.

[3] Intelligent Growth, Digitalisation and Financial Instruments Programme 2021 - 2027

Advance technologies take-up: Continue efforts, including via EDIHs, to increase the uptake of cloud and AI services by companies of all sizes. Continue to increase the number of edge nodes deployed and ensure links with work done on semiconductors, quantum and the internet of things.

Romania continued the implementation of existing measures but did not take any new measure in 2025. While SME intensity has increased, many issues persist in terms of access to finance for startups, scaleups and SMEs as a whole. Cooperation with EDIHs is improving, but needs to be strengthened, particularly when defining financing priorities, as well as business needs and possible support measures in light of the next MFF. According to the new methodology, there are 252 edge nodes in Romania, but no new measures to support the development of edge nodes have been proposed or adopted. Romania continues to not have a digital unicorn.

Strengthening Cybersecurity & Resilience

As for general digitalisation, Romanian enterprises are behind their EU peers concerning in implementing of cybersecurity measures. In 2024, 34.03% of enterprises implemented at least 5 cybersecurity measures (out of 11 as measured by Eurostat), well below the EU average of 56.85%. The gap with the EU is particularly pronounced in the use of data backup in a separate location (48.08% in Romania, 79.23% in the EU), virtual private network (VPN) use (Romania: 30.27%, EU: 49.64%), and network access control measures (45.76%, EU: 65.43%).

Data on the **cyber threat environment** for 2025 was not available during the reference period, but 2024 data (in Romanian) indicates that the main threats are ransomware, malware, Distributed Denial of Service (DDoS) and supply chain attacks. Phishing remains a preferred attack vector, particularly for financially motivated threat actors. As in other parts of the world, cyber threat activities are increasingly hybrid, with a growing overlap between state-sponsored and cybercriminal actors, making attribution harder and attacks more complex. Attackers continue to rely heavily on the mass exploitation of vulnerabilities (especially internet-facing edge devices) with very short exploitation timelines, while also combining opportunistic and targeted operations.

A key development was the adoption of two secondary legislative initiatives under the Network and Information Security (NIS2) Directive that have introduced immediate **compliance obligations** for entities under the Directive's scope, as transposed in Romanian legislation. This has put a lot of pressure on relevant entities, as the time to prepare and guidance offered were limited. An obligation has also been introduced for all entities designated as 'essential' and 'important' to appoint a cybersecurity officer maximum 30 days after their designation. **In the absence of sufficient cybersecurity talent in Romania, this obligation, which is not mentioned in the NIS2 Directive, has led to cases where, in order to avoid fines, existing IT staff have had to fulfil roles that they were not prepared for, with limited improvement in the entities' cybersecurity resilience.**

The two secondary legislative initiatives mentioned above contain the registration process and the risk assessment methodology. In the absence of a dedicated platform, which is under development, registration is done using an excel file signed and sent to a dedicated e-mail address. Around 15 000 to 20 000 Romanian entities are expected to fall under the scope of NIS2 (a significant increase compared to around 1000 entities under the previous NIS Directive). **There is clear scope for providing better support for entities, such as dedicated ICT platforms and automation. The Romanian Cybersecurity Directorate sets out the broad relevant standards that need to be applied, but more could be done to develop sector-specific cybersecurity compliance guidelines.**

Romania

Romania has begun to introduce more structured cybersecurity requirements in public digital investments, including the obligation for public sector funding guidelines to allocate a dedicated 10% cybersecurity component, as well as the use of a standardised Technical and Economic Committee for Information Society (TEC) Security Annex that systematically verifies aspects such as access management, encryption, backup protection, vulnerability management, redundancy, disaster recovery and secure configuration. This is an important development, as in the past cybersecurity was often approached in a project-specific way. This shift to a more coherent and consistent approach to cybersecurity in public projects should be continued and strengthened in order to raise the cybersecurity baseline across authorities and avoid a fragmented approach to cybersecurity.

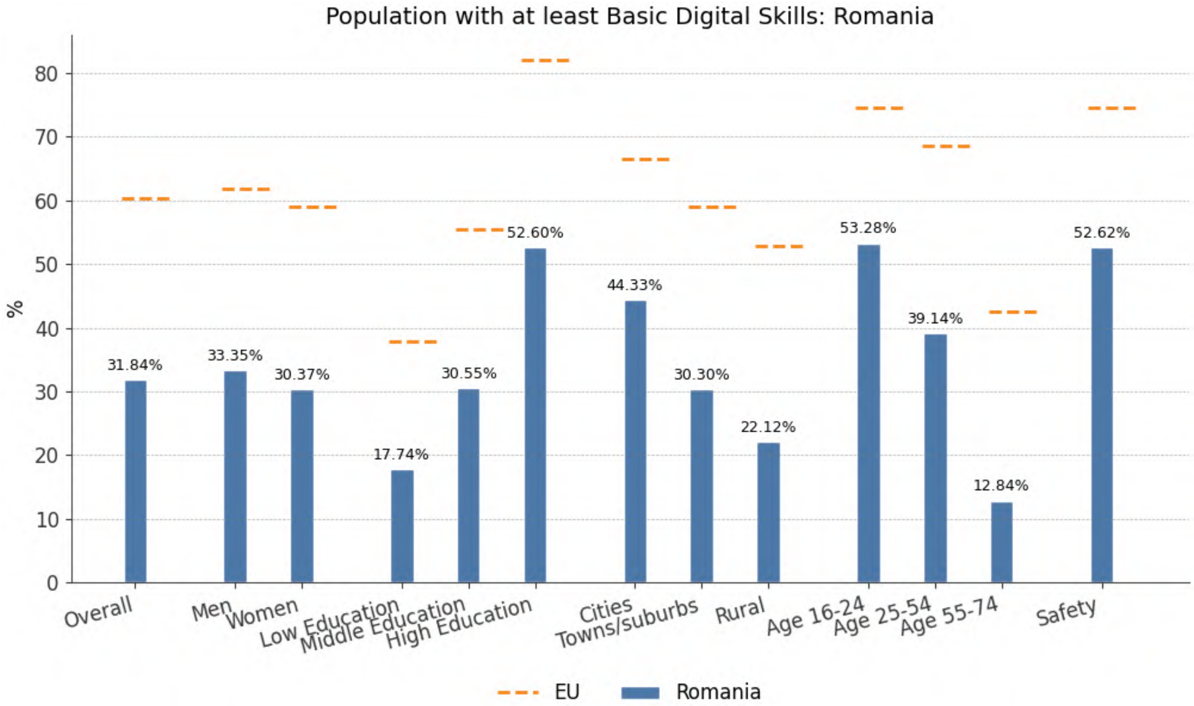
Protecting and empowering EU people and society

Empowering people and bringing the digital transformation closer to their needs

Equipping people with digital skills

Basic Digital Skills

Performance assessment



31.84% of individuals aged 16-74 in Romania have at least basic digital skills, an increase of 7.2% in 2025 compared to 2024. **There is still a considerable gap between Romania's levels and the EU average of 60.40%**. Nevertheless, Romania's growth rate exceeds the EU's annual growth rate of 4.3%, indicating a positive trend in digital skills acquisition.

Regarding the **gender gap**, Romania has a disparity of 2.98 pp. in favour of men, with 33.35% of men and 30.37% of women possessing basic digital skills. This gap is slightly wider than the EU average of 2.75 pp.

Education levels significantly influence digital skills in Romania. Among individuals with no or low formal education, only 14.25% have basic digital skills, which is considerably lower than the EU average of 37.56%. However, Romania's growth rate in this category is an impressive 18.8%, far above the EU's 5.7%. This suggests that educational initiatives are beginning to have an impact.

In **urban areas**, 44.33% of people have basic digital skills, which is lower than the EU average of 66.50%. The gap between urban and rural areas in Romania is 22.21 pp., wider than the EU's 13.67 pp., indicating a significant urban-rural digital divide. In **rural areas**, only 22.12% of individuals have basic digital skills, much lower than the EU average of 52.83%. Romania's growth rate in rural areas (2.7%) is also below the EU's 5.5%, highlighting the urgent need for targeted rural digital skills development programmes.

Young adults aged 16 to 24 in Romania have a digital skills proficiency rate of 53.28%, which is lower than the EU average of 74.55%. For the **older age group** of 55 to 74, only 12.84% have basic digital skills, which is significantly lower than the EU average of 42.6%.

In Romania, 52.62% of individuals reported having at least **basic digital safety skills** in 2025, which is lower than the EU average of 74.63%. However, Romania's annual growth rate of 6.0% in this area exceeds the EU average of 3.6%, indicating progress in increasing digital safety awareness.

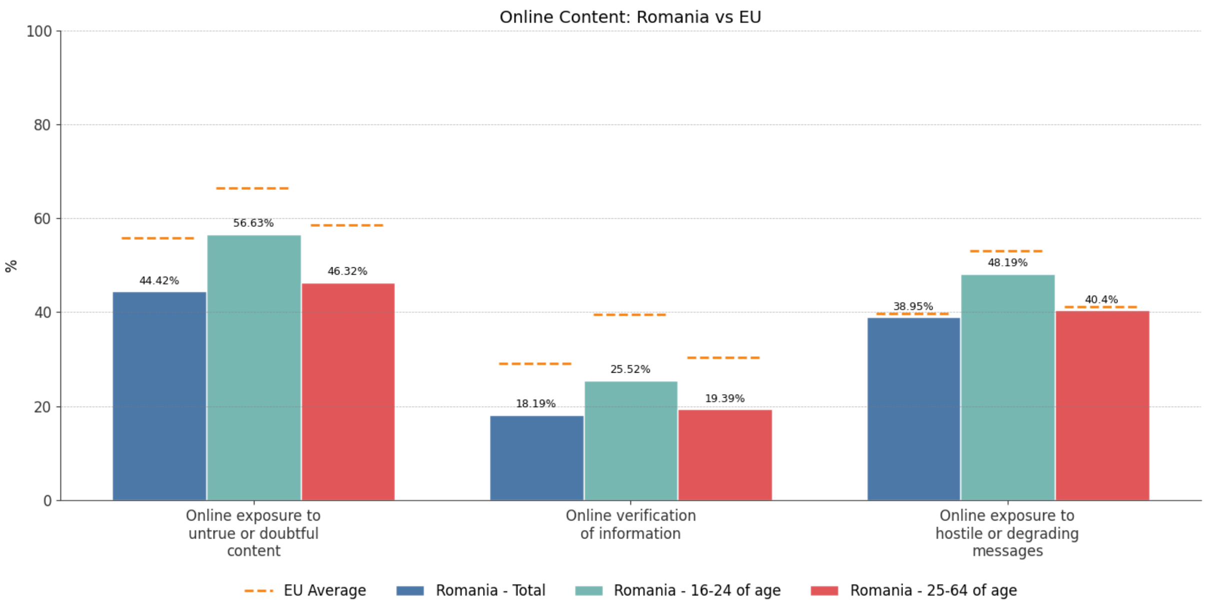
Eurostat indicators reveal that 17.76% of people in Romania **used generative AI** in 2025 for all purposes, which is lower than the EU average of 32.66%. For professional purposes, the usage rate is 5.24%, also below the EU average of 15.36%.

Based on the results of the 2026 Digital Decade Eurobarometer, 59% of Romanians think that the digitalisation of daily public and private services is making their lives easier, while 71% believe that the EU and Member States should cooperate more to promote digital education and skills programmes.

Romania is at 44.42% of **people exposed to untrue or doubtful content online** in 2025, an increase of 23.1% annually from 29.29% in 2023. This puts Romania below the EU average, which rose from 49.25% in 2023 to 55.90% in 2025. Younger people (16-24) are more exposed to such content, with 56.63% in 2025, compared to 46.32% for those aged 25-64.

18.19% of individuals **verified the truthfulness of information online**, an increase of 34.7% annually from 10.02% in 2023. This figure remains below the EU average of 29.16% in 2025. The EU's annual growth rate was 9.6%. Younger people (16-24) are more likely to verify online content (25.52% of people in 2025) than those people aged 25-64 (19.39%).

In terms of people **exposed to hostile or degrading messages online**, Romania reached 38.95% in 2025, an annual increase of 36.8% from 20.81% in 2023. This is slightly below the EU average of 39.72% in 2025. Younger people are more exposed to such content, with 48.19% in 2025, compared to 40.40% of people aged 25-64.



Romania

Policy context and assessment of the recommendations

The formal adoption of the Romanian Digital Competence Framework (DigCompRo) in April 2025 is a significant legislative milestone. Now fully operational in 2026, the framework should serve as core framework for all public policy efforts to increase basic digital skills in the education process. The framework is used in NRRP-funded training initiatives such as Digital Stars, where course content and performance levels are mapped to DigCompRo, and is further supported by Order No. 1928/2025, correlating DigCompRo performance levels with ECDL/ICDL certification modules. This creates the basis for a more coherent approach to curriculum design, learning outcomes, assessment and certification across digital skills programmes.

In pre-university education, Romania has integrated digital competencies into the national graduate profile. The evaluation of these skills is now a mandatory component of the Baccalaureate exam, ensuring that digital literacy is an essential skill for high-school graduates. This has been accompanied by extensive teacher training initiatives, with nearly 94 000 teachers having completed digital teacher training programmes by the end of 2025. Over time, this should translate into better performance for the 16 to 24 age group in terms of basic digital skills. Nevertheless, the situation could be improved further. Romania's teacher evaluation system remains heavily reliant on seniority and the attainment of formal 'didactic grades', a structure that often rewards longevity over innovative teaching methods. Many schools have been receiving infrastructure upgrades and training through NRRP and ESF+ funding projects, but **teachers do not have clear incentives to integrate digital tools into their daily lessons, leading to uneven adoption**.

Since 2024, Romania has been implementing a national strategy for adult training, but its performance monitoring framework and adaptability to emerging trends and labour market needs remains in an early stage. **Public policy continues to prioritise upskilling civil servants and the unemployed.** By the end of 2025, more than 30 000 public sector employees were trained in advanced digital skills, and 2 500 public sector managers were trained in digital transformation leadership. **Private sector employees receive very limited support,** with existing measures deemed too complex to access.

Another key development has been the reduction in the number of public libraries to be transformed into digital skills development hubs from 1135 to 560 after the renegotiation of the Romanian NRRP. This change will likely have negative implications for rural digital inclusion, especially given the wider-than-the-EU-average urban-rural digital skills gap. This contrasts with the opinion of Romanian citizens. According to the 2026Digital Decade Eurobarometer, 77% of Romanians think it important to make digital tools more accessible for everyone, especially vulnerable groups, older people and people with disabilities.

In terms of combating disinformation, a major regulatory step in 2025 was the adoption by the National Audiovisual Council of the new Audiovisual Content Regulatory Code. The Code applies to audiovisual media services under Romanian jurisdiction irrespective of the means of transmission. It defines concepts such as disinformation (the intentional dissemination of false or misleading information with harmful effects), incorrect information (the unintentional dissemination of false information with harmful effects), illegal content, harmful content, and online content creators exercising editorial responsibility.

Romania

ICT specialists

Performance assessment

Romania remains a leader in terms of the proportion of ICT graduates, at 7.10%. However, Romania is at only 2.7% of ICT specialists in total employment after a decrease of -3.6% in 2025, well below the EU average of 5.0%. This is an alarm signal for the Romanian ICT sector. The supply side remains efficient, but, with the removal of tax incentives, combined with a broader global tech cooling, the decrease in the number of ICT specialists could mean that the low-cost, high-quality model for the Romanian ICT industry is reaching its limits.

Romania leads the EU in women as a proportion of the total number of ICT specialists, at 27.8%, an increase from 27.3% in 2024 (EU 2025 average 19.5%).

Policy context and assessment of the recommendations

To ensure that ICT specialists training meets market demand, the Romanian Government is using the European Digital Competence Framework in the nationally adapted DigCompRo as the foundational standard. This should make it possible to bridge the gap between academic output and employers' needs by providing a common language for skills in high-growth areas such as cybersecurity, AI, and software development. **While the framework provides a solid start, in terms of ICT specialists its scope should likely go beyond introductory qualifications (National Qualification Framework levels 2-4) and move toward the high-tier specialised certifications required to reach the Digital Decade target of 400 000 specialists.**

Through an e-learning platform, Romania has trained the employees of 1 000 Romanian SMEs (2560 employees) in digital technologies (IoT, cloud, big data, automated learning, AI, robotic process automation, blockchain, cyber-physical systems and additive manufacturing).

The planned modernisation of 61 universities through the creation of innovative hubs, such as the Automotive Innovation Centre and AI-specific laboratories, demonstrates a clear intent to align educational infrastructure with industrial requirements, particularly in the IoT and autonomous systems sectors. A notable example is the Alexandru Ioan Cuza University in Iași, which has established a suite of sophisticated laboratories dedicated to machine learning, virtual reality, and cybersecurity (CyberEDU).

Overall, multiple initiatives exist, and the necessary hardware and laboratory equipment has been purchased, but this needs to continue to be translated into tangible progress, in the form of people trained, collaboration initiatives between private companies and education systems and a clear monitoring system to track how the legal and institutional frameworks are being implemented.

Looking outside the education system, the Romanian labour market for ICT specialists continues to be affected by limited public support and persistent talent retention challenges. The recent phase-out of sector-specific fiscal incentives, combined with a period of global market volatility, has intensified pressure on national industry. This has resulted in lower investment margins and reduced competitiveness for Romanian ICT firms, which, with limited internal demand for IT specialists from traditional economic sectors, remain largely reliant on outsourcing models.

Attracting and retaining high-level ICT expertise is also critical for the success of Romania's complex public digitalisation projects. Encouragingly, Romania has taken steps to address historically rigid labour legislation by updating the classification of occupations to reflect the current economic and technological trends. Romania has also initiated the necessary legislative steps to align its public sector job classifications with the European e-Competence and Cybersecurity Skills Frameworks. If successful (currently the proposal is in public consultation) this would standardize recruitment, certification, and career paths across core ICT disciplines while introducing specific salary coefficients to help retain technical expertise. Addressing systemic matters, such as competitive compensation and the management of intellectual property (IP) for developed solutions, is also essential for building the internal capacity required to operate a sovereign digital ecosystem.

More broadly, the Romanian ICT industry remains mostly a consumer, rather than a creator of talent. This affects in particular people starting out on the job market, with a 'junior developer gap' emerging as companies are reluctant to invest in upskilling new employees who leave after a few months, while, at the same time, the market is readapting to AI. This gap is likely to have repercussions throughout the industry (the 2025 decrease in the number of ICT specialists could be a first sign of this), but also, in the long term, on future student enrolment.

2025 recommendation:

Basic digital skills: Continue to integrate basic digital skills as a core component of the education process, both for teachers and students. Make upskilling, particularly of employees in the private sector and older population, a priority.

ICT specialists and advanced skills: boost SME digital skills by simplifying support measures and engaging stakeholders to identify market needs. Identify ways to attract and retain ICT talent.

Romania made some efforts to address the recommendation through new policy actions in 2025.

Basic digital skills: By adopting the DigCompRo framework, Romania has made good progress in addressing the basic digital skills gap. This should yield results over the medium term. For adults, public policy continues to be mostly focused on civil servants and the unemployed, with limited support for the upskilling of those working in the private sector or older people. Romania has reduced the number of public libraries that were meant to become digital skills hubs, risking the exacerbation of the country's digital divide.

ICT specialists and advanced skills: Progress has been made on turning universities into innovation hubs. There is scope for working more closely with stakeholders and defining clear paths that include studies, collaborations with private companies and government support to ensure market needs are met and talent remains in the country.

Key digital public services and solutions – trusted, user-friendly, and accessible to all

Performance assessment

In 2025, Romania's total digital public services score reached 64.25/100 points. This is a 2.4% increase compared to 2024. Romania is below the EU average of 84.64/100 points. A significant disparity exists between the availability of online services for national and cross-border citizens. When looking specifically at digital public services for national citizens, Romania reached 74.00/100 points in 2025, while for cross-border digital public services for citizens, its 2025 score was 54.52/100 points.

Citizen related life events that score particularly well include health (84.29), starting a small claims procedure (79.17) and moving (75.00). Conversely, family (28.98), career (49.30), and transport (64.26) show the most room for improvement. Across levels of government for national citizens' digital public services, central government services scored 78.88/100 points, regional government services 66.39/100 points, and local government services 66.02/100 points.

Romania

Romania's total digital public services score for businesses (covering both national and cross-border businesses) was 66.83/100 points in 2025, putting it below the EU average of 88.59/100 points. This is a 21.2% increase from 2024.

Across the two Digital Decade key performance indicators (KPIs), Romania’s digital public services for businesses indicator performs better than its counterpart for citizens. This stronger performance is underpinned by digital public services for businesses available to national users, which forms the most mature component of the KPI, with cross-border digital public services for businesses less developed.

Looking at the underlying features of key online public services, a mixed picture emerges regarding user-friendliness, efficiency, and transparency. Romanian digital public services perform fairly well in terms of mobile friendliness, with a score of 92.65, slightly below the EU average of 97.35.

In terms of user support, Romania scores among the lower performing Member States, with a score of 75.66 (EU average 90.01). Nevertheless, Romania has improved its performance since 2024 (71.69).

Romania also underperforms in terms of the transparency of service delivery, design and personal data, with a score of 38.04 (EU average 69.59). This performance is driven in particular by (i) limited opportunities for users to manage personal data held by public authorities through government portals (transparency of personal data, scoring 34.22) and (ii) the little extent to which users are involved in designing services (transparency of service design, scoring 41.67).

Finally, Romania severely underperforms in terms of pre-filled online forms (the share of eGovernment services which use information previously submitted to trusted government websites). The pre-filled forms indicator - a good proxy for how the once-only principle functions for a country - was 20.22 in 2025, compared with the EU average of 75.93.

Policy context and assessment of the recommendations

The greatest progress made by Romania has been in the transition to the **governmental cloud**. Financed through the NRRP, the project is in its final infrastructure stage before being fully operational following the completion of key data centres in Timișoara and Brașov. 15 entities were selected to handle the migration of at least 30 critical governmental applications to the cloud by June 2026. The entire process is extremely complex, due to a range of factors.

Firstly, the migration of applications to the government cloud is not a simple relocation, but requires architectural analysis, security classification, data preparation, compatibility assessments, testing, operational continuity planning and, in the case of legacy systems, potential refactoring.

Secondly, **the digital public service landscape in Romania has historically been developed in a fragmented way**, with each institution preferring to invest in its own, insular solution. In addition to interoperability issues, this has led to multiple cases where offline procedures are mirrored in the online environment. This fragmented nature has further increased the degree of complexity in the transition process to the governmental cloud.

Thirdly, there is a need for legislative and administrative changes, as legal provisions and current administrative practices often nullify the benefits of carrying out digital procedures. For example, certificates issued and procedures completed online by a government body are, in practice, not accepted by the same body in the real world because specific legal requirements still require the procedures to be carried out on paper. **Overall, Romanian institutions continue to be unable to meet their own obligation under national law to fulfil the once-only principle.**

To address this, Romania has started the National Interoperability Platform project, financed through the European Fund for Regional Development. With a total budget of approximately EUR 33 million, the platform should enable real-time, automated data exchange between separate public sector information systems. The procurement of the required services has been postponed, but, when functional, the platform should allow for the full implementation of the once-only principle, in accordance with the provisions of Law 242/2022. By facilitating the automated interconnection of national base registries, it should ensure that citizens and businesses are no longer required to provide information or documents already held by the state.

Another key development has been initial roll-out of the **ROePAS platform**. This platform is designed to serve as the national single digital gateway. Developed with NRRP support, the portal aims to provide a unified entry point for citizens and businesses, centralizing previously fragmented online interfaces. The platform's framework is structured to enable secure electronic identification and integrate data sources across public institutions. A gradual transition process is underway to migrate existing administrative procedures to the new system.

A new platform (fara-hartie.gov.ro) has also been set up for citizens and companies to flag **burdensome procedures**, including regarding issues faced when trying to use digital public services. Every 30 days, the most frequently flagged issues are sent to the eGovernment and Bureaucracy Reduction Committee, which debates and decides on the necessary solutions. It is unclear if the Romanian government also plans to commit to a maximum number of days to solve the most frequent issues or if a tracker or a dashboard will be introduced to show how the issues are handled.

Most of the work done so far on the governmental cloud has been to ensure the infrastructure and platform components and moving existing state applications to the cloud. So far 9 applications have been moved to the cloud, while 12 other applications are being migrated. During the reporting period contracts were yet to be signed for the migration of an additional 20 applications. In addition to finalising the move for these services, **a key aspect moving forward will be to develop the marketplace component of the governmental cloud to enable the private sector to provide digital solutions for public service needs**.

A similar situation exists in business licensing. Romania is working on implementing the Electronic Single Point of Contact for industrial licences, which would constitute significant progress on addressing the fragmented and heavily burdensome licensing system in the country (a recent OECD assessment mapped 502 different licenses, issued by 65 institutions). **While 51% of the monitored licences can be applied for online, the process remains decentralized across multiple portals and payment methods, often with no automated system to inform them of the status of the request.** Clear information on the licences needed, the procedure for obtaining them, being able to apply for a licence using a single portal that would implement the once-only principle, a unified payment system and a system for tracking the status of a request – would considerably improve the licensing regime, thereby stimulating entrepreneurship. As part of such efforts, the Romanian Ministry of Finance recently announced an initiative to digitalise customs services. This should reduce the complexity of administrative procedures for customs authorizations and procedures for both companies and citizens.

The maturity of Romania's digital public services also depends on modernizing key sectoral workflows that directly interface with citizens and businesses. In addition to business licencing, essential administrative verticals, such as tax administration and the judicial system, have underperformed. In the area of tax administration, the Ministry of Finance recently highlighted ongoing PNRR-funded efforts to launch a modernized tax payment portal, including expanding pre-filled tax declarations use.

In the judicial, Romania encounters delays in deploying the necessary decentralised IT systems that form the basis for the Justice Digital Exchange system, a key reform for the digitalisation of cross-border public judicial services.

Romania currently has two primary **eID solutions**, the ROeID mobile application (recognised under the eIDAS Regulation) and the biometric electronic identity card. For the latter, the revised NRRP sets as a target the issuing of 3.5 million cards by June 2026. This target will likely not be met, as fewer than 1.5 million cards had been issued as of March 2026. Despite technical solutions being in place, Romania continues to rank among the last countries in the EU for eID use to access online services for private purposes (10.1% of the population, a decrease from 11% in 2023).

An element of progress in terms of legislative change has been the publication of the implementing norms clarifying the procedures for the use of **electronic signatures** in Romania. Long criticised for its high costs and low adoption rates, e-signature use in Romania should increase after the new rules define procedures for both qualified and non-qualified trust service providers.

Another key development is the possibility of using the certificate on the electronic ID card to provide advanced signatures on PDF documents. This will cover many peoples' interactions with public institutions, particularly local authorities. Nevertheless, a qualified signature is still required for many interactions between businesses and the state.

Romania has indicated that 2026 will also be the year of starting the implementation of the **digital wallet**. The development of the EU Digital Identity Wallet solution is in the very early stages, with the required governance regulatory framework still lacking and the technical solution not yet developed.

Ultimately, 2026 is a decisive year for Romania to bridge the gap between digital infrastructure and the broad take-up of digital public services. The convergence of the governmental cloud, the upcoming Digital Identity Wallet, and the recently liberalised e-signature framework is a chance to provide a unified ecosystem. For this vision to happen, solutions must be developed in an open, transparent manner and rigorously stress-tested together with the Romanian software industry, whose representatives have indicated their willingness to provide the technical expertise needed to test the new systems. By working collaboratively, Romania can move beyond 'digital by mandate' to deliver an attractive and trustworthy digital solutions package for citizens and businesses.

e-Health

Romania is taking steps to modernize the national health sector through digitalisation. The Ministry of Health has awarded a EUR 6.9 million contract, funded via the Romanian NRRP, for its digital transformation. It aims to improve administrative efficiency, transparency and service quality by digitalising internal institutional workflows and launching an e-government portal for citizens and businesses.

Romania also announced it was starting consultations on a **new national strategy for digital health 2026 – 2030.** The document introduces a high level of ambition, aiming to replace legacy paper-based workflows with a unified digital ecosystem. The strategy also prioritises the single-entry point for patient data, which is supposed to translate into a reduced administrative burden for both patients, and healthcare providers. A similar process took place in 2024, with that iteration of the strategy ending up not being adopted. It is unclear if lessons learned from the previous consultation have been integrated into the new text.

The complexity of this digital transformation is very high, as it requires a complete overhaul of the Romanian healthcare system. The draft strategy includes a new Digital Health Directorate for policy and a Digital Health Unit for implementation. These would have to be adequately staffed and allowed to focus on the process without excessive interference from the political level.

The core of Romania's health system digitalisation is the national health insurance platform (PIAS). **The current system is outdated**, unable to meet the demands of a growing user base and an increased data capacity, leading to multiple instances of the system being unavailable. Because of this, Romanians can access their health records online in theory, but not in practice.

The new PIAS platform should be available mid-2026, operationalised through NRRP funding (EUR 100 million). According to the government, the new platform should enable the removal of most paper form requirements, digitalising referrals and medical leave requests, offer access to personal medical files and integrate electronic prescriptions.

Besides the necessary hardware for running the new PIAS and for digitalising hospitals and clinics, the new system would need a strong cybersecurity component, integration into the national eID system, data governance solutions tailored to future data needs and interoperability with existing systems and with the European Health Data Space and its secondary use requirements. These efforts would need to be doubled by ensuring the necessary upskilling of both medical staff and people in general to ensure that the solutions put in place are actually taken up and used throughout society.

These initiatives constitute a radical transformation of Romania's healthcare delivery. **It is essential that this transformation put user needs centre stage, in a way that is easy and simple to understand.** To restore public trust, significantly eroded by the current system, the new eHealth ecosystem must deliver benefits that are immediate and unequivocal. Implementing key points from the draft strategy such as giving patients more access to their data, setting up a National Waiting List Registry, and implementing the single-entry principle could considerably help to make the system more patient-centric, transparent and traceable instead of the current physician-centric and opaque model. Introducing measures to discourage the use of paper or bring about digital consultations could help the likelihood of the new system being adopted.

To ensure long-term sustainability, the relevant public authorities should develop the new solutions more inclusively, by moving away from isolated in-house developments toward a transparent framework aligned with international and European interoperability standards. By engaging the private sector as a strategic partner through collaborative validation phases, such as beta-testing, the administration could ensure that digital solutions are technically sound and meet actual market needs. Most of this digital transition has been financed by the RRF, which will stop in June 2026. **There is a clear need to ensure financing sustainability, particularly for the maintenance and improvement of PIAS, from July 2026 onwards.**

In terms of achieving universal citizen access to their electronic health records (EHRs) by 2030, Romania's score remained unchanged from last year (75.1). Major differences persist in the use of these tools according to people's socio-economic background. Data on medical devices and implants is not available. Citizens can access their EHR data through an online portal, but a mobile application is not yet available. Authentication is possible by means of two-factor authentication, but not through an EUDI-compliant eID. Another gap in Romania's eHealth maturity is that the online access service does not fully comply with web accessibility guidelines.

To date, nine Romanian organisations have joined the Network of AI-powered Advanced Medical Centres, which aims to speed up the introduction of innovative solutions for the prevention, early detection and diagnosis of cancer and cardiovascular disease. The cross-border harmonisation, secure storage, processing, and analysis of health data for high-impact use cases is also supported by federated infrastructures and governance. In this context, Romania has appointed a representative in the Genome European Digital Infrastructure Consortium Working Group.

2025 recommendation:

Digital public services: Continue to dedicate the necessary resources (finance, project management, ICT specialists) for the digitalisation of public services, including after the initial set-up (maintenance and support). Streamlining of the multiple existing projects that have been promoted as 'single point of contact' could also be envisaged.

eHealth: Continue to expand the data sources available online. Adopt and implement the new strategy on the digitalisation of health system, taking into account user needs and ease of use.

Assessment of progress:

Digital public services: **Romania made some efforts to address the recommendation through new policy actions in 2025.** Romania has made progress in setting up the infrastructure component of the governmental cloud. It needs to progress significantly in moving key applications in the cloud and building the cloud marketplace. Romania continues to be unable to implement the once-only principle. Romania has started work on the National Interoperability Platform and beta launched the ROePAS portal that is meant to be the national single digital gateway for all digital public services. It aims to provide a unified entry point, but the portal links to many other non-harmonized pages that break the user journey through inconsistent design and functionalities.

eHealth: **Romania continued to implement existing measures but did not take any new ones.** Romania has not adopted the strategy on the digitalisation of health systems but has made progress in digitalising the activities of relevant institutions. In terms of accessing EHRs, Romania has stagnated. The new health platform is not yet functional, and the current one continues to be plagued by functionality issues, limiting the people's access to their data. There is limited interaction with outside stakeholders in developing and testing the new health platform.

Leveraging digital transformation for a smart greening

Recently published by Eurostat, sectoral data on **air emissions** show that the ICT sector in Romania emitted 27 kg CO2 eq per capita, which is above the EU average of 22.8 kg CO2 eq (data from 2022). Most of these emissions come from activities of the ICT services (69.8%). **The ICT sector represented 0.57% of air emissions in the total economy, above the EU average (0.35%)** (data from 2022)**.**

Romania adopted its national ecological procurement programme in 2025, introducing mandatory annual targets for public authorities to purchase green IT equipment, by including specific energy-efficiency and recyclability standards required to meet eligibility criteria for participating in public tenders.

The Romanian Government also took significant steps to digitalise the Ministry of the Environment's processes, including the subsidies workflow and environmental permit issuance.

Green cloud technology was a key criterion for setting up the governmental cloud, with the data centres required to use some of the most advanced low-power and cooling solutions available. The planned Black Sea AI gigafactory will also be powered by nuclear and renewable energy, combining to meet the 1.5GW power needs.

Recycling ICT material remains problematic, with 86% of Romanians continuing to hold on to their older, no longer used IT equipment, particularly smartphones, chargers and cables. Environ Romania has estimated that by doing so, Romania misses out on recuperating over 2 tonnes of rare metals each year.

Citizens' perceptions in the 2026 Digital Decade Eurobarometer show that 49% of Romanians believe that green digital technologies will have the most positive impact in the next 10 years.

2025 recommendation: Develop a comprehensive strategy to align digitalisation with environmental goals
Romania made some efforts to address the recommendation through new policy actions in 2025. Romania has not put forward a green and digital strategy, but progress has been made in terms of both green ICT (green standards implemented in building the governmental cloud) and ICT for green (the digitalisation of environmental permits and subsidies schemes).

Annex I – National roadmap analysis

Romania's national Digital Decade strategic roadmap

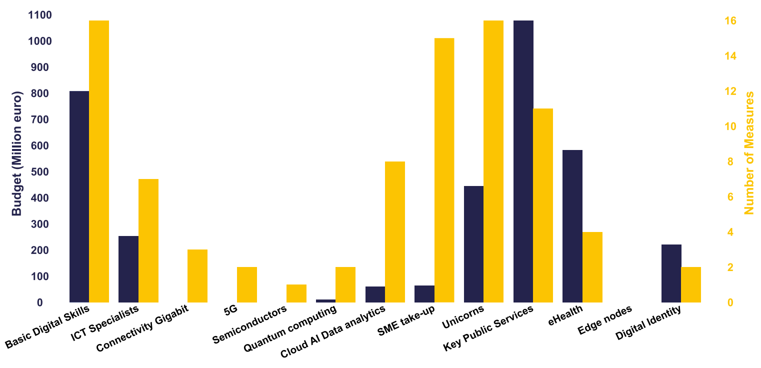
Romania has not updated its national roadmap since presenting it in 2023 (adopted in 2024), but plans to do so, having started the process in March 2026. This roadmap update is combined with a planned digitalisation strategy that would be adopted via a Government Decision.

The roadmap and the NRPP have been instrumental in guiding the digitalization projects Romania had ongoing. However, **there is a clear need for an update given the phasing out of the RRF**, the main source of funding for the NRPP, and of the new financing opportunities in the 2028-2034 Multiannual Financial Framework.

The process of updating Romania's roadmap can be a key opportunity to improve the overall digitalisation coordination framework, by defining clear responsibilities and ensuring the necessary political steer for the achievement of digitalisation objectives. In terms of targets and trajectories, the revised roadmap could take into account the KPI definitions developments since 2023. Ambition could also be raised for certain KPIs, such as 5G coverage, data analytics and AI.

The upcoming digitalisation strategy needs to be co-designed by a broad coalition of actors, including regions, industry leaders and civil society, to ensure shared ownership. To be effective, this strategy would then need to be steered at a high political level, for example by the Romanian Deputy Prime-Minister in charge of digitalisation, to ensure that efforts are harmonised across public institutions, roles and responsibilities are clarified, and the necessary multi-annual financing is secured. Crucially, this governance structure must be designed for institutional continuity, insulating long-term digital goals from short-term political cycles.

Measures and budget in national roadmap[4]



The roadmap includes 97 measures, with a total value of almost EUR 3.59 billion (about 1.01% of GDP). They cover all Digital Decade targets, but some measures are deemed to contribute to more than one target (e.g. measures related to the digitalisation of businesses), making precise attribution difficult.

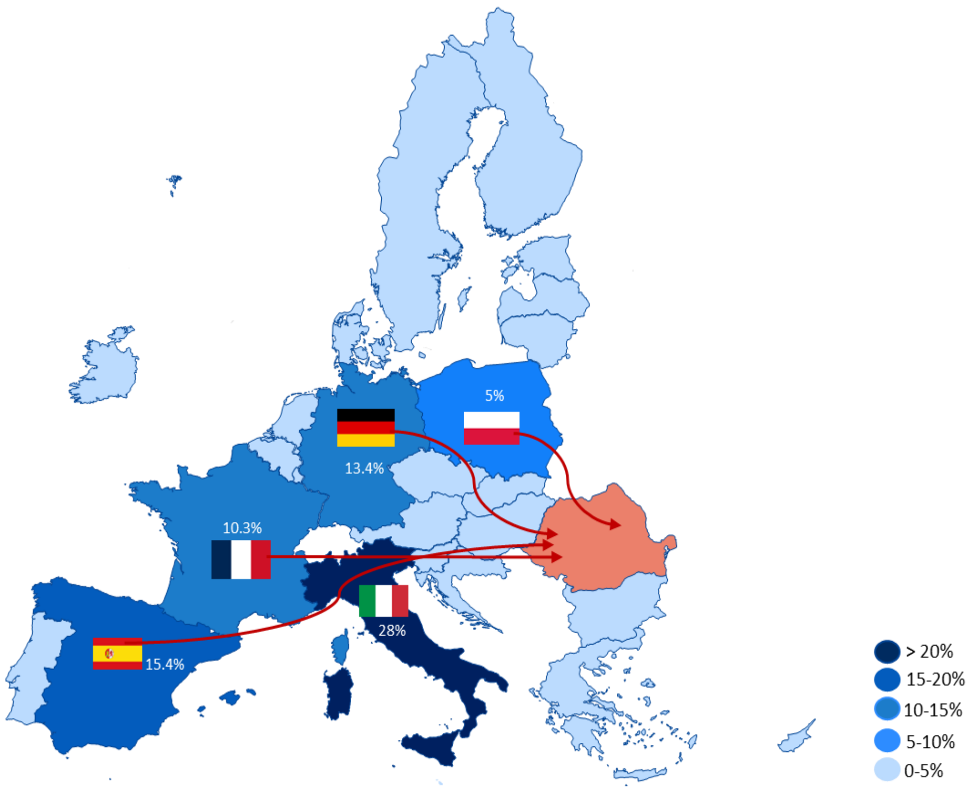
[4] When referring to national roadmaps, data used in this report are those declared by the Member States in their national roadmaps, on the basis of the Commission's guidance (C (2023) 4025 final). Data might reflect possible variations in reporting practices and methodological choices across Member States. No systematic assessment of the extent to which Member States followed the guidance was carried out.

Annex II – Funding, economic impacts & Multi-country Projects

Country results from the study 'Assessing the Economic Impact of Digital Investments under the Recovery and Resilience Facility'

A modelling study conducted by the European Commission services, with the FIDELIO model, assesses the economic impact of the digital component of the RRF. As of November 2025, the digital part of the Recovery and Resilience Plan of Romania was evaluated to EUR 5.77 billion with EUR 494 million for digital infrastructures, EUR 1.25 billion for digital skills, EUR 1.07 billion for the digitalisation of businesses, EUR 1.96 billion for the digitalisation of public services, and EUR 996 million for other digital priorities.

The total economic impact of RRF digital measures is estimated to be EUR 4.39 billion for the national economy. Of this, EUR 3.59 billion stems from the direct effects of Romania's own RRP and EUR 795 million corresponds to spillover effects from the implementation of other EU Member States' plans. Romania benefited the most from spillover effects from RRPs of Italy (EUR 223 million), Spain (EUR 122 million), Germany (EUR 107 million). The most impacted sectors are ICT Services (EUR 1.17 billion), Manufacturing (EUR 883 million), and Construction (EUR 466 million).



RRF spillover effects to Romania

Romania

Funding from the Recovery and Resilience Facility (RRF) & Cohesion Policy

Romania allocates 21% of its total RRP to digital (EUR 4.5 billion)[5]. In addition, under cohesion policy, EUR 3.2 billion, representing 10% of the country's total cohesion policy funding, is dedicated to advancing Romania's digital transformation[6].

Multi-Country Projects

Romania is a member of the EUROPEUM EDIC. Romania is also an observer to the Alliance for Language Technologies EDIC and the IMPACTS EDIC and is working towards setting up an EDIC in the area of agri-food. Romania is directly participating in the IPCEI on Microelectronics and Communication Technologies (IPCEI-ME/CT). Romania is also a participating state of the EuroHPC Joint Undertaking (JU) and of the Chips JU.

[5] The share of financial allocations that contribute to the achievement of digital objectives has been calculated using Annex VII to the Recovery and Resilience Facility Regulation. Last data update: 23 April 2026.

[6] This amount includes all investment specifically aimed at or substantially contributing to digital transformation in the 2021-2027 cohesion policy programming period. The source funds are the European Regional Development Fund (including Interreg), the Cohesion Fund, the European Social Fund Plus, and the Just Transition Fund.