



Romania Cloud Business Survey 2025

Scaling beyond pilots in a region that's accelerating



| | | | | | |
|----------|-------------------------|----|----------|---------------------------|----|
| | Introduction | 03 | 4 | FinOps and Sustainability | 19 |
| 1 | Cloud maturity | 05 | 5 | Conclusions | 23 |
| 2 | Cloud strategy | 10 | | About the survey | 24 |
| 3 | Artificial intelligence | 16 | | | |

Agenda



Introduction

Romania's cloud journey is at a crossroads. High-maturity companies have nearly doubled since 2023, yet the middle tier - where cloud scales from pilots to enterprise-wide impact - has contracted rather than grown. While peers in Poland and the Czech Republic are accelerating, many Romanian companies are still working through foundational challenges: migration depth, governance gaps, and cautious budgets.

But Romania is not lagging in all areas. It leads CEE in cloud sustainability, with 70% of businesses already acting on sustainable infrastructure and 93% factoring sustainability into their provider choices.

Customer experience has overtaken cost savings as the top priority, signalling a shift from efficiency-driven adoption to value-driven transformation.

This report examines how Romanian companies are navigating cloud in 2026, where structural barriers persist, where momentum is building, and where the country's distinctive strengths could reshape its path forward.

Note: The findings presented in this report are indicative rather than statistically representative, given the small sample size for Romania.





Romanian businesses are still catching up on cloud. Maturity levels are lower than in CEE, FinOps integration is limited, and agentic AI adoption is early-stage. However, these figures are indicative given the sample size, and there are significant nuances that the numbers alone may not capture - such as recent cloud initiatives driven by government entities like the Authority for the Digitalization of Romania (ADR) and the Ministry of Economy, Digitalization and Entrepreneurship, which signal growing institutional momentum.

There's also another side to the story. Romanian companies lead CEE in cloud sustainability - 70% are taking action on sustainable infrastructure and 57% have addressed climate risks in their cloud strategy, the highest in the region. Romania has a real opportunity to build a cloud environment that catches up with advanced practices while being sustainable from the start.

Gabriel Voicilă

Digital Technology Partner

PwC Romania





1

Cloud maturity

From regional leader to laggard in cloud maturity

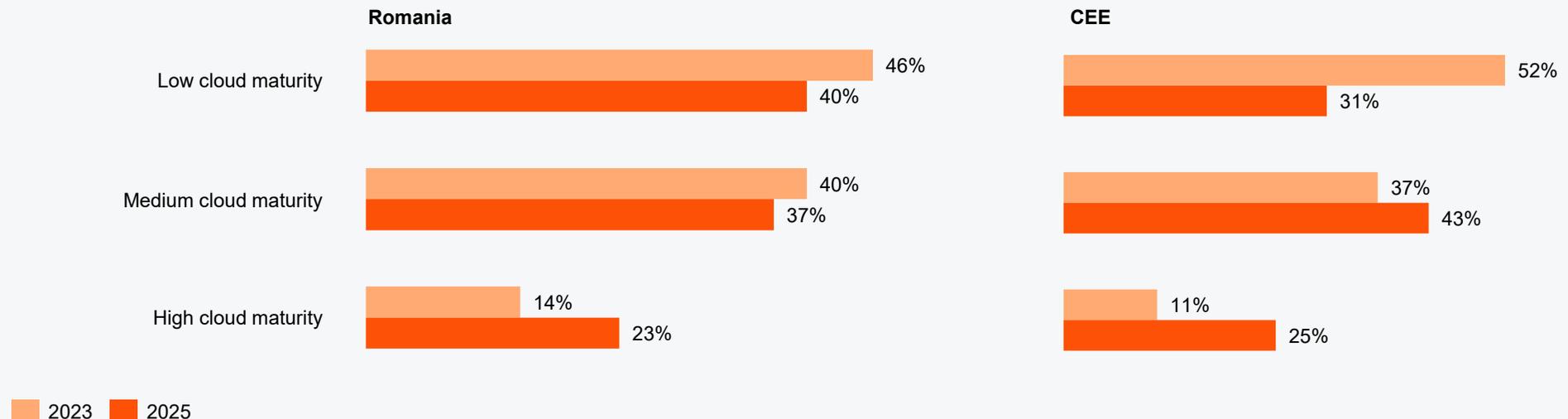
Romania's cloud maturity has been advancing unevenly in the last two years, lagging behind the regional pace. While local organisations with high-maturity cloud programs nearly doubled from 14% to 23%, the critical middle tier contracted from 40% to 37%, at a time when CEE's top and middle layer grew to 31% and 43% respectively.

This evolution suggests a polarisation: a small group of leaders is pulling ahead, while a large share of local organisations remains stuck at low maturity (40% vs. 31% CEE), struggling to move beyond pilots and isolated use cases.

60%

of organisations in Romania have adopted cloud in all or many parts of their business

Which of the following best describes your organisation's use of cloud?



Migration and AI implementation trail behind despite strong intent

Cloud migration remains a work in progress for Romanian organisations. Only 23% have migrated applications broadly across their business, compared to 36% in CEE, while a further 37% have done so in some parts. A third of organisations still plan to implement migration in the next 12 months, suggesting that for many, moving workloads to the cloud is still ahead of them rather than behind them.

The AI gap is even more pronounced. Just 13% of Romanian organisations have implemented cloud-based AI/ML tools in many parts of their business, less than half the CEE average of 29%. However, 43% have

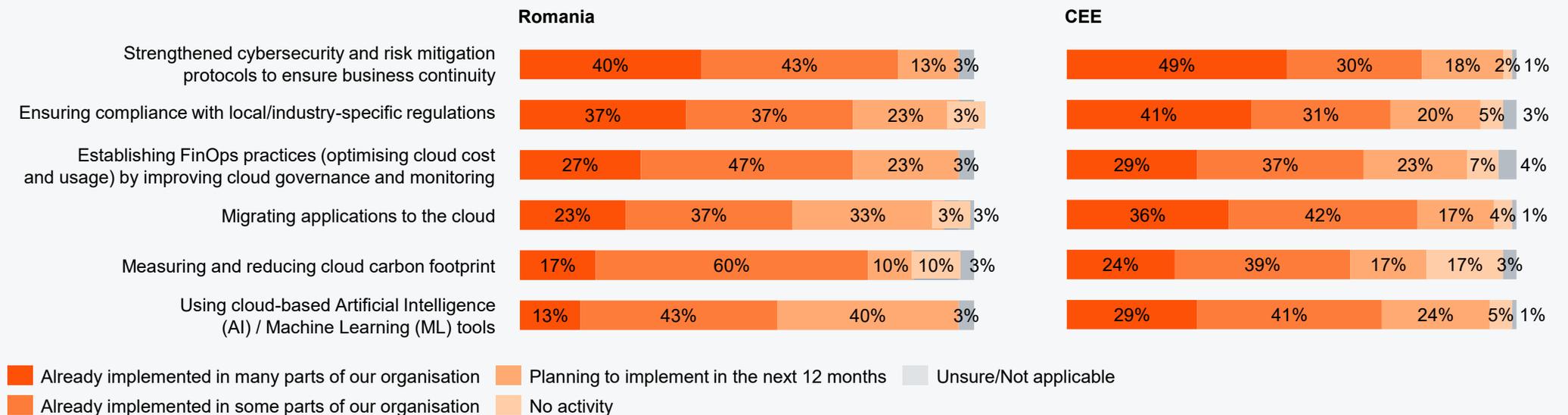
begun implementation in some areas and 40% are planning to act in the next year, making AI the initiative with the strongest forward momentum.

On cybersecurity, Romania is closer to the regional norm: 83% have implemented strengthened protocols in many or some parts of their organisation, approaching the CEE's 79% combined figure, and compliance initiatives show a similar pattern. Where Romania quietly distinguishes itself is on sustainability: 77% have already started measuring and reducing their cloud carbon footprint, compared to 63% in CEE, with only 10% reporting no activity.

83%

of companies in Romania have already implemented strengthened cybersecurity and risk mitigation protocols in many or some parts of the organisation

Which, if any, of the following cloud-related initiatives has your organisation implemented or is planning to implement?



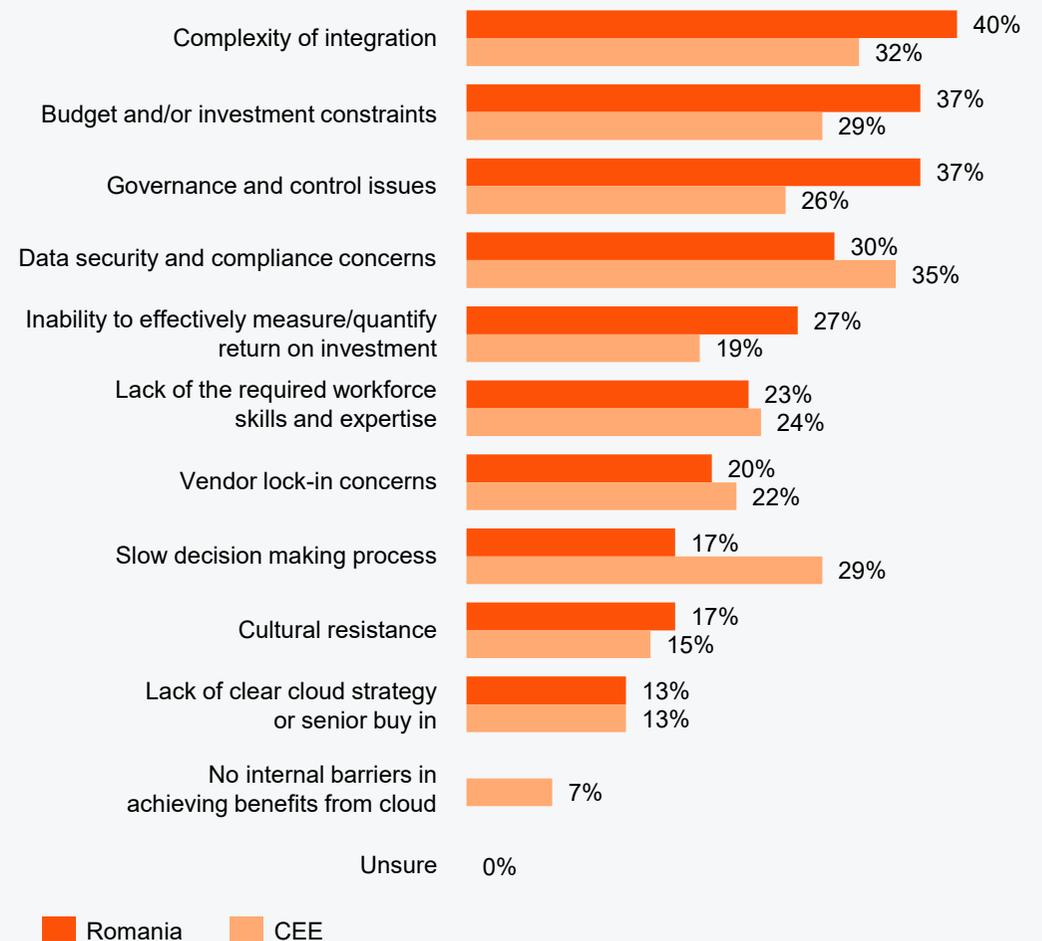
Governance is Romania's most disproportionate barrier

Integration complexity is the single largest internal barrier for Romanian organisations, cited by 40% of respondents, above the CEE average of 32%. However, governance and control issues affect 37% of organisations, 11 percentage points above the CEE average of 26%, making it the most disproportionate barrier relative to the region. Adding budget constraints (37% vs. 29% CEE), the picture shows that, for many Romanian organisations, ambitions outpace the operational frameworks and financial capacity needed to deliver on them.

On a brighter note, data security and compliance (30%), skills gaps (23%) and slow decision-making (17%) are less of a concern in Romania than across CEE, suggesting the bottlenecks are more structural and financial than organisational or cultural.



Which, if any, are the biggest internal barriers to your organisation achieving measurable value from your cloud strategy? (Ranked top three)

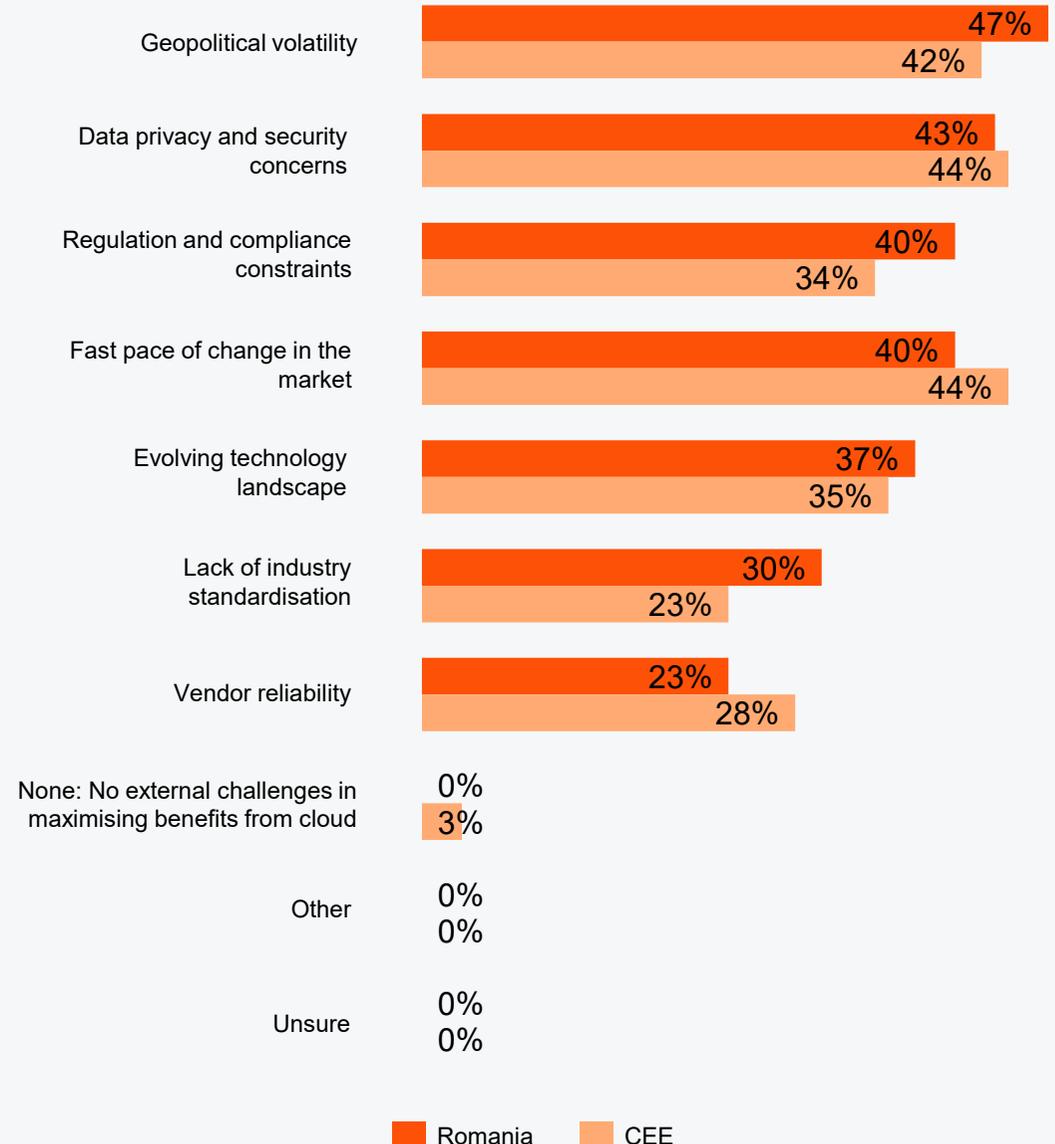


Geopolitics outweighs data privacy as the top external concern

Geopolitical volatility dominates Romania's external challenge landscape at 47%, five points above the CEE average of 42%, reflecting the country's heightened exposure to regional instability. Interestingly, data privacy and security and fast pace of market change, which rank as joint top concerns across CEE at 44%, are lower in Romania at 43% and 40% respectively, suggesting that the geopolitical and regulatory environment weighs more heavily on Romanian leaders' minds than the data governance and market change concerns that preoccupy their peers elsewhere in the region.

Regulation and compliance constraints stand out at 40%, six points above the CEE average of 34%, reinforcing Romania's sensitivity to the external regulatory burden. The lack of industry standardisation (30% vs. 23% CEE) also points to fragmented standards that may be creating additional friction for organisations trying to scale cloud investments across sectors.

Which, if any, are the biggest external challenges to your organisation achieving measurable value from your cloud strategy? (Ranked top three)





2

Cloud strategy

Cloud budgets grow, but cautiously

Romania's budget outlook is positive but distinctly cautious. The largest group (37%) expects growth of 5% or less, modest by CEE standards, where 40% anticipate 6–14% increases.

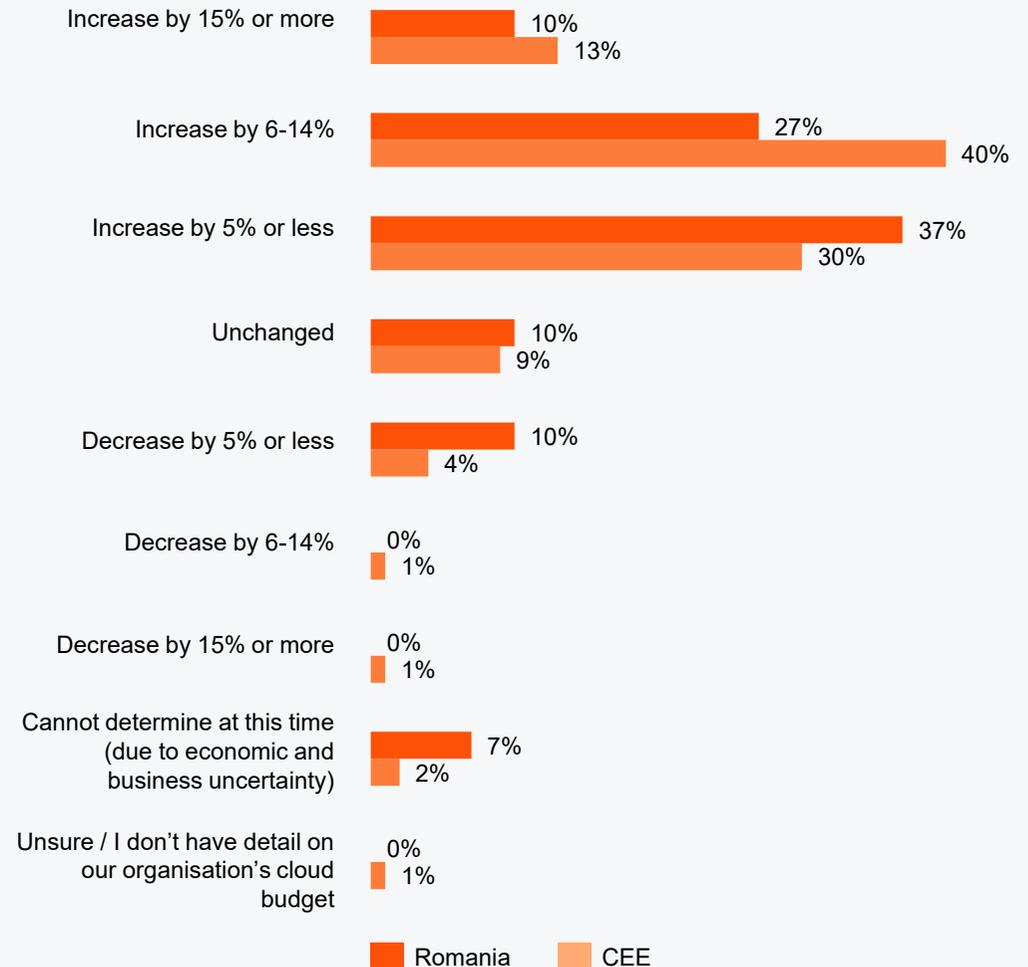
The 20% of organisations reporting flat or declining budgets (vs. 13% CEE) and the 7% unable to determine their trajectory due to uncertainty (vs. 2% CEE) reflect a market where economic and geopolitical pressures are directly constraining investment capacity.

74%

of organisations in Romania plan to increase their cloud budget in the year ahead



How is your organisation's cloud budget changing over the next 12 months?

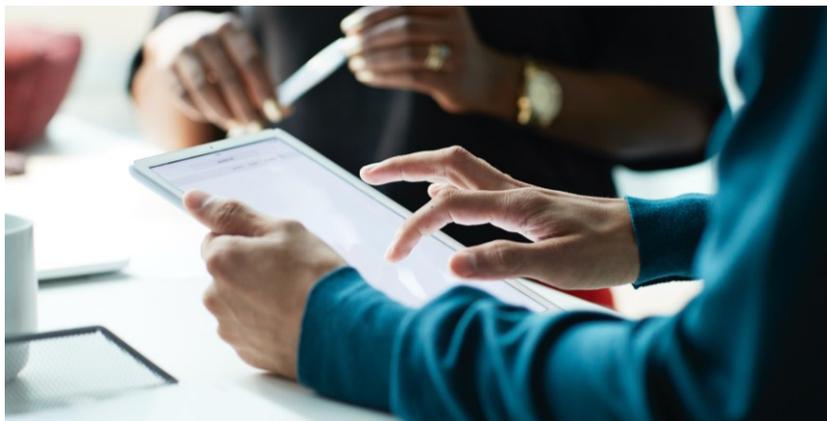


Investment priorities: Foundations first, frontier later

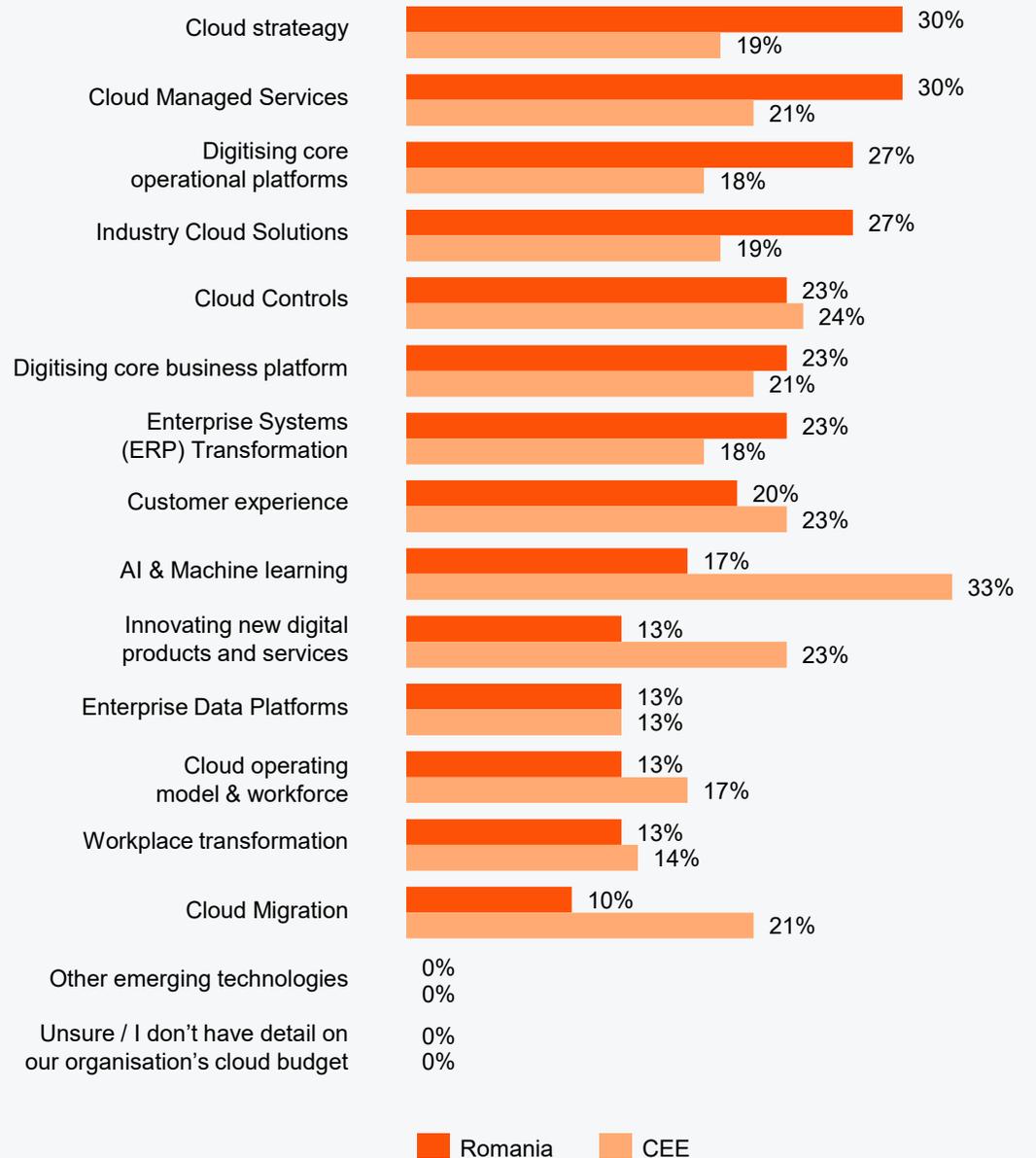
Romanian organisations' investment priorities reveal a market focused on consolidating foundations rather than pursuing frontier technologies. Cloud strategy and cloud managed services each top the list at 30%, well above the CEE averages of 19% and 21% respectively. Industry cloud solutions rank high at 27% (vs. 19% CEE), alongside digitising core operational platforms at the same level (vs. 18% CEE).

The most striking divergence is on AI and machine learning: only 17% of Romanian organisations prioritise it, roughly half the CEE average of 33%. This is consistent with Romania's lower AI data readiness and use of agentic AI.

Innovating new digital products and services is also low at 13% (vs. 23% CEE), confirming that Romanian organisations are prioritising operational backbone over frontier innovation.



Which of the following cloud investments is your organisation prioritising in the next 12 months?



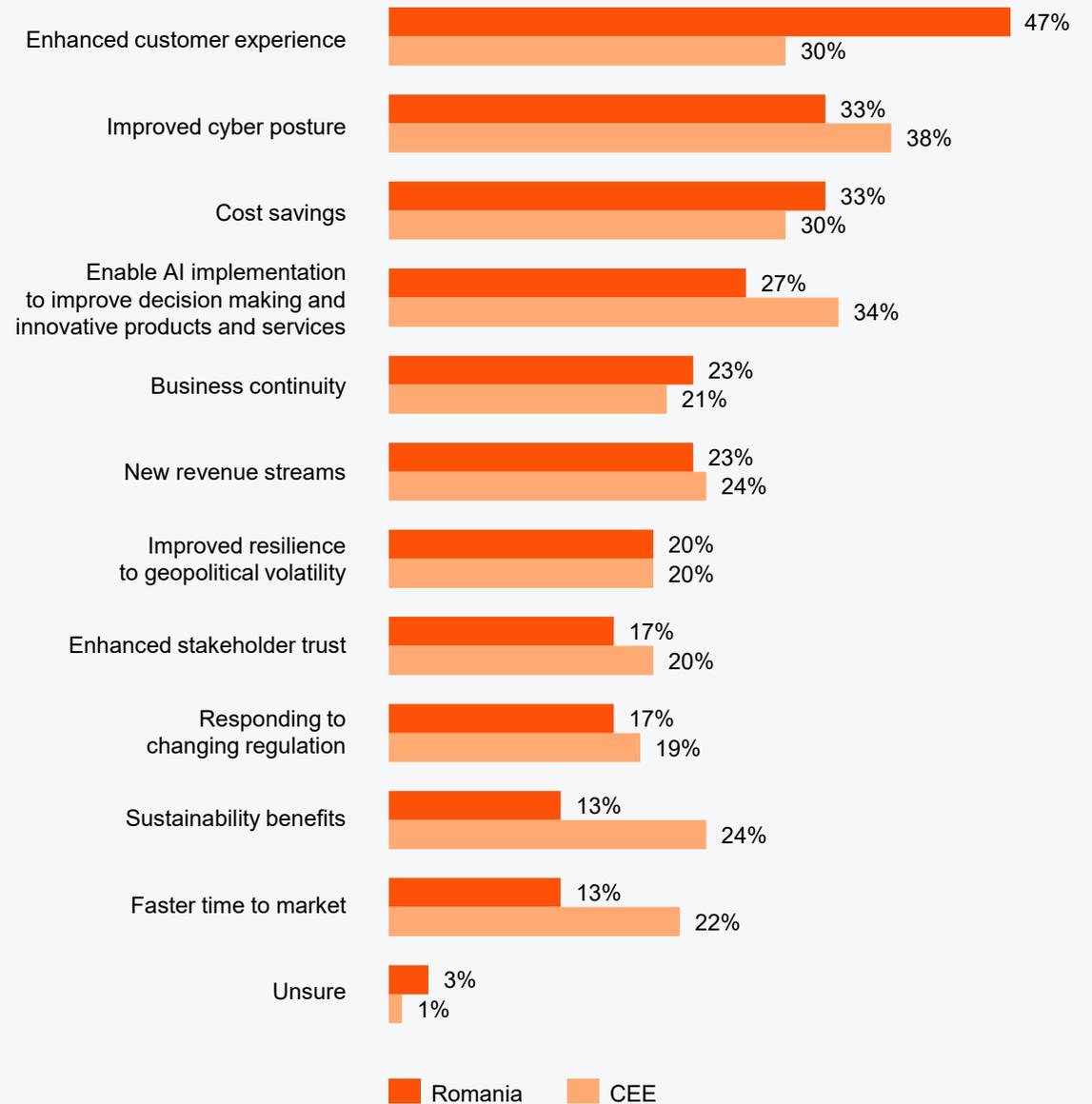
Customer experience, the top expected outcome from cloud investment



Enhanced customer experience is the top outcome Romanian organisations are targeting from cloud, at 47%, strongly above the CEE average of 30% and the highest prioritisation in the region. This marks a clear strategic shift from 2023, when cost savings led the agenda, while customer experience was not among the top-ranked outcomes.

Improved cyber posture and cost savings now share second place at 33% each, while AI-enabled decision-making ranks at 27%, below the CEE's 34%, reflecting Romania's earlier stage on AI readiness. Sustainability benefits rank surprisingly low at 13% (vs. 24% CEE), suggesting that while Romanian organisations actively invest in sustainable infrastructure, they frame sustainability as an operational discipline rather than a measurable cloud outcome.

Which of the following outcomes is your organisation prioritising from your investment in cloud technology over the next 12 months?



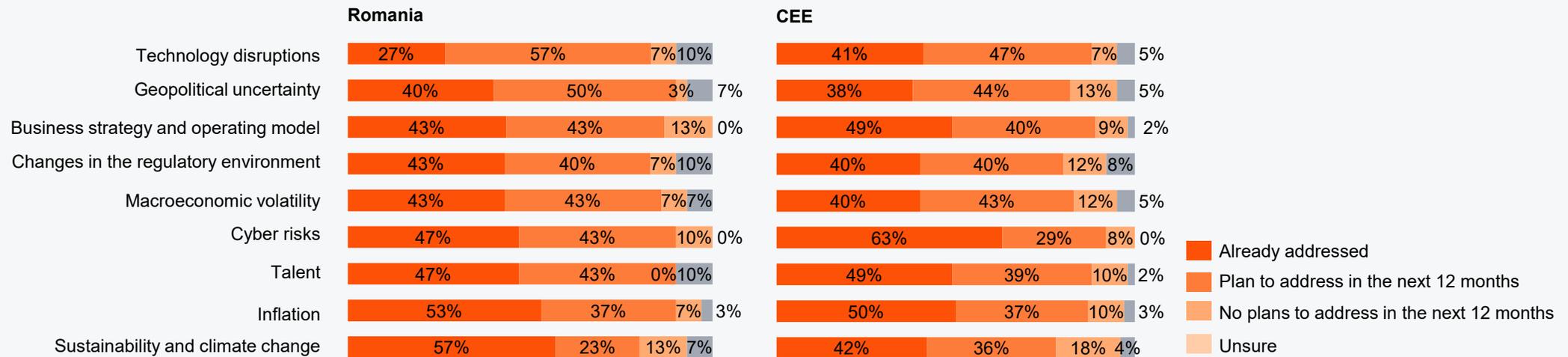
Romanian organizations, behind on addressing cyber and tech risks

Romania's risk profile reveals a market that has been most proactive on sustainability and inflation but trails on cybersecurity and technology disruption. Sustainability and climate change leads as the most-addressed risk, with 57% already having tackled it, well above the CEE average of 42% and the highest in the region. Inflation follows at 53% (vs. 50% CEE).

However, cyber risks have been addressed by only 47% of Romanian organisations, compared to 63% across CEE, the largest deficit against a regional benchmark. Technology disruptions are also significantly behind, at just 27% addressed compared to 41% in CEE. Romanian organizations are planning to catch up and address these risks in the next 12 months.



Which, if any, of the following risks and challenges have been addressed in your organisation's cloud strategy?



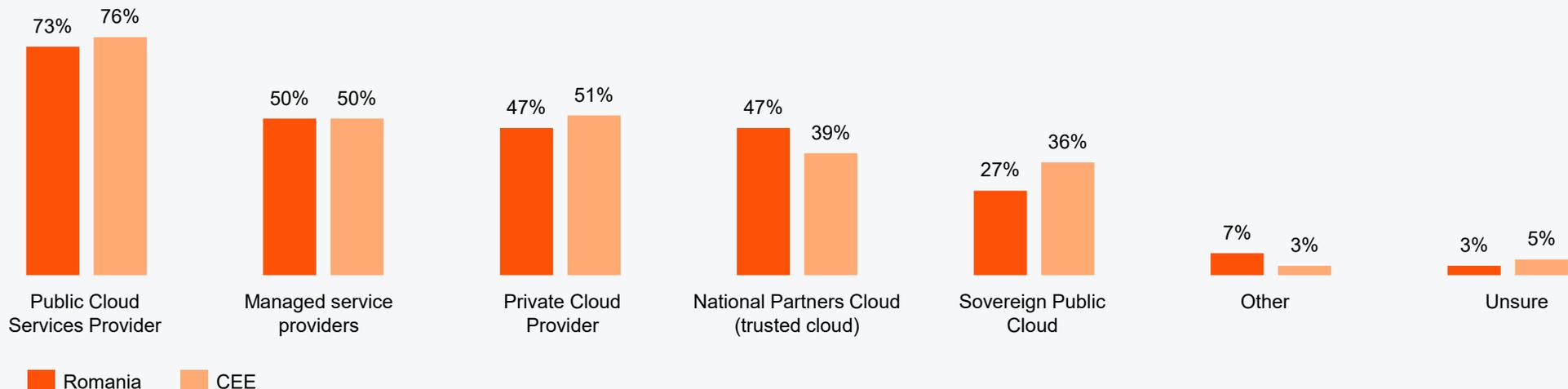
Local organizations favour trust over sovereignty in infrastructure

Romanian organisations are broadly aligned with CEE on cloud infrastructure choices, with some notable differences in sovereign and national cloud. Public cloud is used by 73% of Romanian organisations, close to the CEE average of 76%. Managed service providers are equally relied upon at 50% in both Romania and CEE, reflecting the importance of external expertise in managing cloud complexity. Private cloud adoption stands at 47%, slightly below the CEE's 51%.

Where Romania diverges more is on national partners cloud (trusted cloud), which at 47% is significantly above the CEE average of 39%, suggesting that Romanian organisations place greater emphasis on locally trusted providers, potentially driven by their heightened sensitivity to geopolitical risk and data sovereignty. Conversely, sovereign public cloud uptake is lower at 27% versus 36% in CEE, indicating that formal sovereign cloud solutions have not yet gained traction.



Which of the following types of cloud infrastructure does your organisation currently use?





3

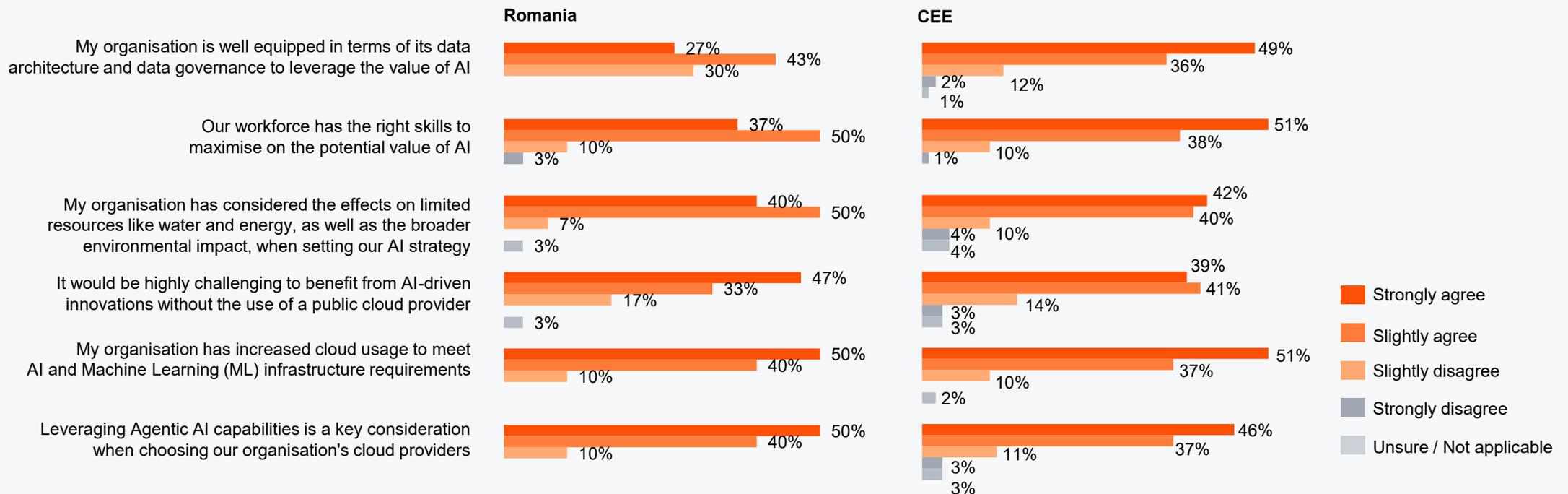
Artificial intelligence

Cloud investment for AI outpaces data readiness

Romania's AI readiness profile shows clear strengths on cloud-AI linkage and sustainability, but significant gaps on foundational data architecture and governance. Only 27% of Romanian respondents strongly agree that their organisation is well equipped in terms of data architecture and governance to leverage AI, far below the 49% CEE average. Workforce skills readiness is also below par at 37% versus 51% in CEE.

However, Romanian organisations show strong conviction that public cloud is essential for AI: 47% strongly agree it would be highly challenging to benefit from AI without a public cloud provider, compared to just 39% in CEE. Notably, 50% strongly agree they have increased cloud usage for AI/ML requirements, nearly matching the CEE's 51%, and an equal 50% say agentic AI capabilities are a key consideration when choosing providers, slightly above the CEE's 46%.

To what extent do you agree or disagree with the following statements about your organisations use of artificial intelligence (AI)? (Only 'strongly agree' responses)



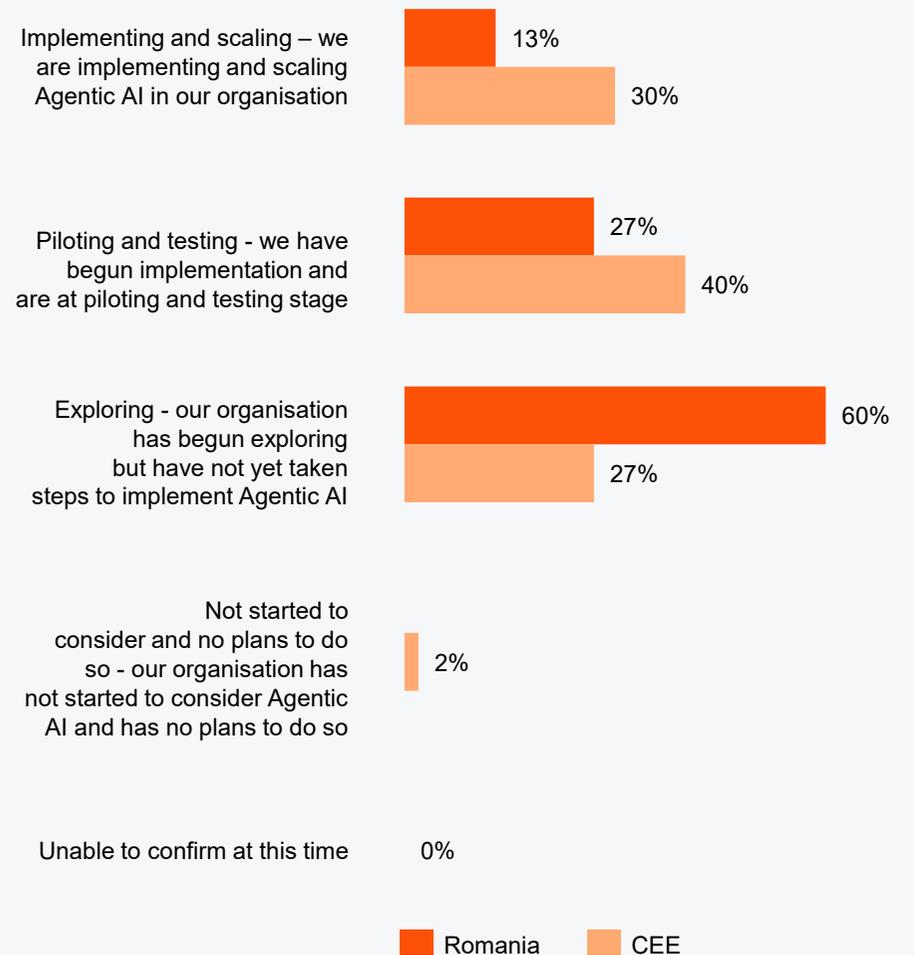
Agentic AI: awareness is high, action is not

Romanian organisations are at the earliest stages of agentic AI adoption among CEE countries. Sixty percent are still in the exploration phase, more than double the CEE average of 27%, while only 13% are implementing and scaling, less than half the regional rate of 30%.

The concentration in the exploration phase, combined with the low data architecture readiness, suggests that Romanian organisations recognise agentic AI's importance but lack the foundational infrastructure and governance frameworks to move beyond early investigation.



How would describe your organisation's use of Agentic AI?





4

FinOps and Sustainability

FinOps is active but focused on a single provider

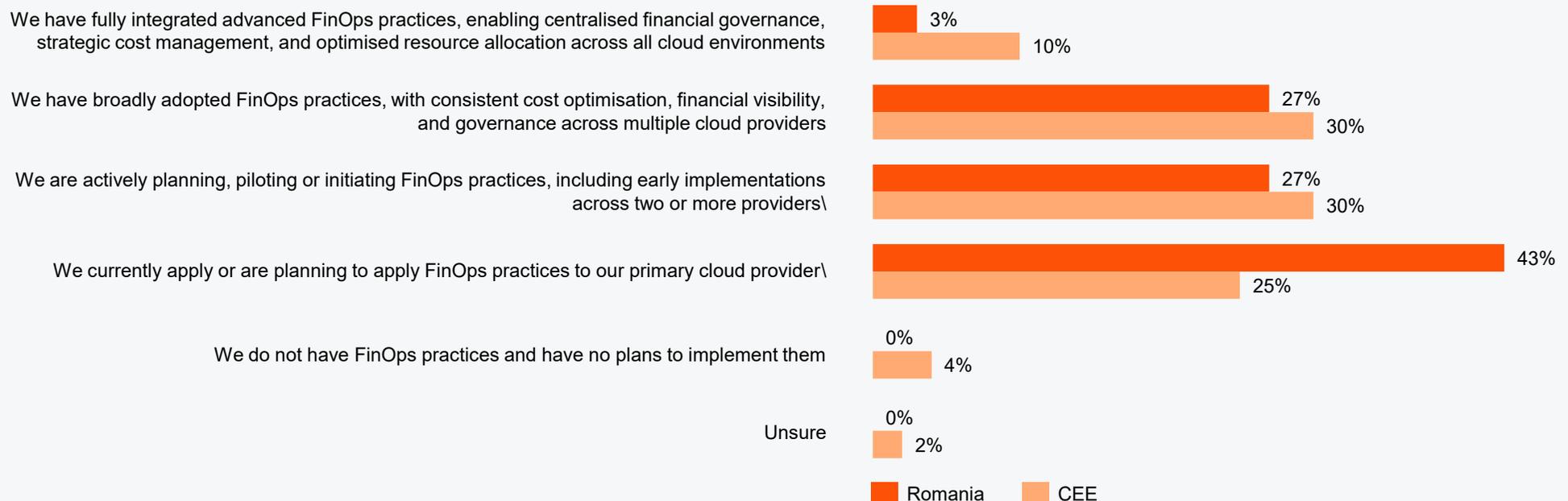
Romania's FinOps maturity is concentrated at the tactical end of the spectrum. Forty-three percent of organisations currently apply or plan to apply FinOps practices only to their primary cloud provider, nearly double the CEE average of 25% and the highest single-provider focus in the region.

Only 3% report fully integrated advanced FinOps practices, compared to 10% in CEE, representing the widest maturity gap. However, 27% have broadly

adopted FinOps across multiple providers and another 27% are actively planning or piloting, both close to CEE levels of 30% each.

The challenge ahead is transitioning from tactical cost control to cross-platform governance as multi-cloud environments expand.

Which of the following statements best describes your organisation's current adoption of FinOps practices?



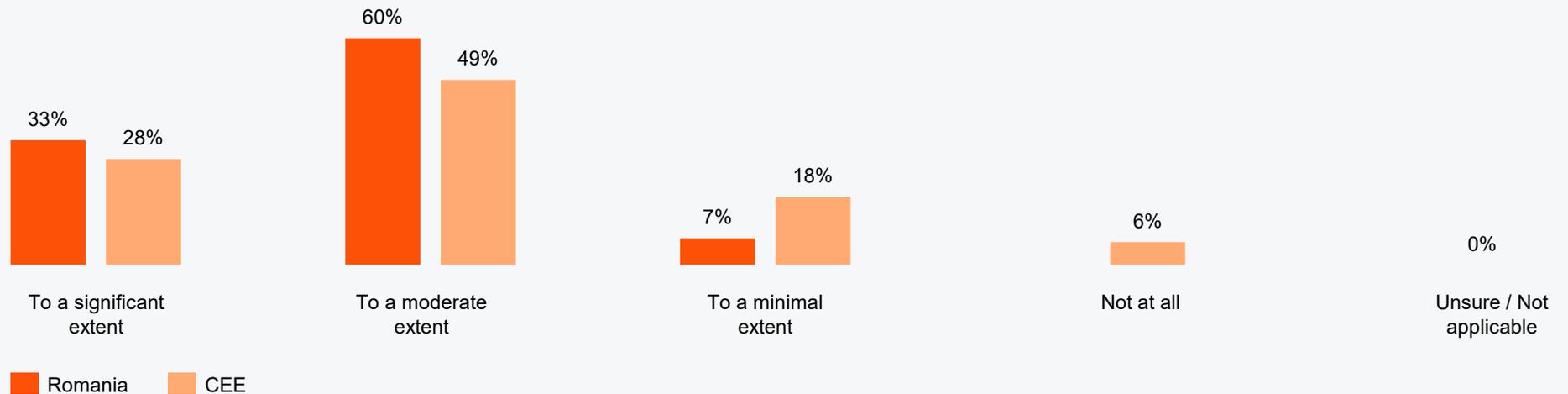
Sustainability shapes cloud procurement

Sustainability considerations influence cloud provider choice more strongly in Romania than across CEE as a whole. A third (33%) of Romanian leaders say sustainability significantly influences their selection, above the CEE average of 28%, while 60% consider it to a moderate extent, also above the CEE's 49%.

This demand-side signal, combined with Romania's leading implementation of sustainable infrastructure, suggests a market where sustainability is not merely aspirational but is actively shaping commercial decisions and vendor relationships.



To what extent, if at all, is your organisation's choice of cloud provider(s) influenced by sustainability considerations (such as the effects on limited resources like water and energy, as well as the broader environmental impact)?



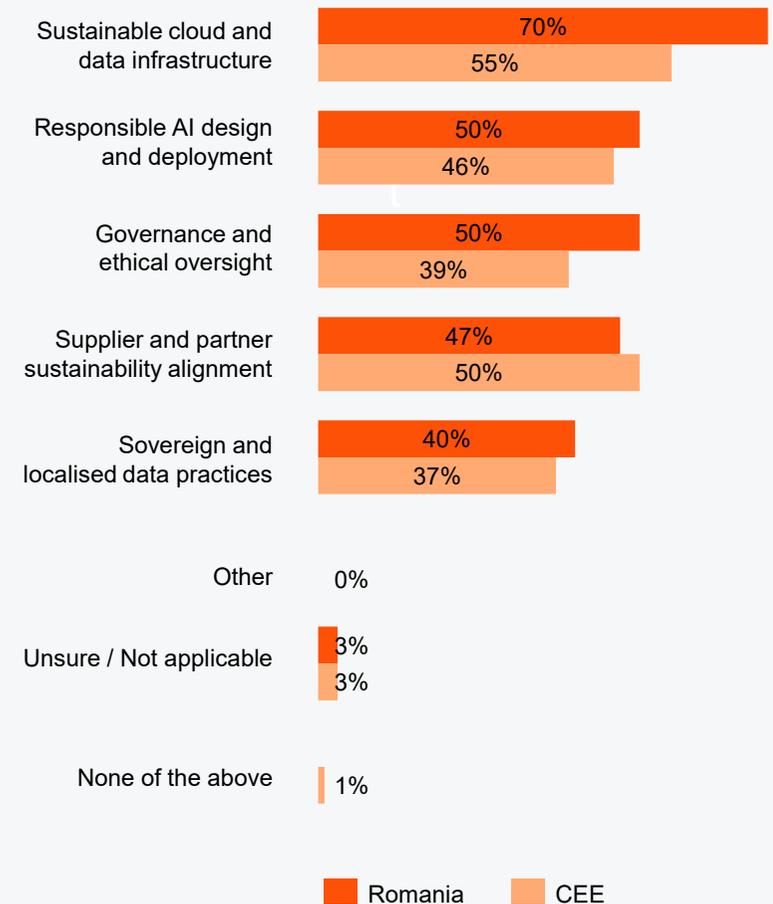
Romania leads the region on sustainable cloud

Romania leads CEE on the most tangible sustainability measure: 70% of organisations are taking action on sustainable cloud and data infrastructure, compared to 55% across CEE. This 15-percentage-point advantage is the single largest positive gap Romania holds over the region on any metric in the survey.

Responsible AI design and deployment is also strong at 50% (vs. 46% CEE), and governance and ethical oversight matches this at 50%, 11 percentage points above the CEE average of 39%. This governance strength on sustainability and AI ethics contrasts with the low governance confidence seen in Romania's general cloud and AI readiness responses, suggesting that Romanian organisations may be more advanced in applying governance frameworks to sustainability and responsibility than to broader cloud financial and operational management.



Which, if any, of the following measures does your organisation take to ensure that the use of cloud technologies is in line with your sustainability objectives and supports responsible AI practices?



Conclusions

Romania's cloud landscape has shifted. Cloud is no longer a back-office efficiency play. It is becoming the platform through which organisations pursue customer experience, resilience, and growth. The fact that customer experience has overtaken cost savings as the top cloud priority signals that Romanian leaders increasingly see cloud as a lever for value creation, not just cost reduction.

But the foundations are not yet fully in place. Migration depth trails CEE peers, governance gaps are the widest in the region, and AI readiness remains early-stage. Budget caution and geopolitical exposure add further pressure, making it harder to accelerate at the pace the market demands.

Where Romania stands apart is sustainability. With 70% of organisations acting on sustainable cloud infrastructure and 93% factoring sustainability into provider choices, the country has built a genuine regional advantage that is already shaping procurement decisions and responsible AI practices. This is not aspirational, it is operational.

The path forward is about closing the gap between intent and execution. Romanian organisations are planning aggressively across nearly all risk and capability areas, with almost no one sitting on the sidelines. The challenge is converting that planning into migration depth, governance maturity, AI readiness, and cross-platform financial discipline. Romania has the ambition and the sustainability credentials. Now it needs the operational foundations to match.



About the survey



PwC surveyed 210 Technology and Business leaders from seven Central and Eastern European countries, including Romania, across a range of industry sectors (Industrial Products; Financial Services; Energy, Utilities and Mining; Technology, Media and Telecommunications; Retail and Consumer; and Health). The fieldwork was conducted between July and September 2025.

The sample for Romania included 30 respondents, and the industry breakdown is as follows:



Thank you

pwc.com

© 2026 PwC. All rights reserved. PwC refers to the PwC network and/or one or more of its member firms, each of which is a separate legal entity. Please see www.pwc.com/structure for further details.