

---

# Defense and Security Market Report

Romania

May 2023



## Contents

---

<b>1</b>	<b>DEFENSE &amp; MILITARY .....</b>	<b>2</b>
1.1	TRANSITION FROM WARSAW PACT TO NATO MEMBERSHIP .....	2
1.2	MAIN BODIES AND INSTITUTIONS.....	3
1.3	ROMANIAN ARMED FORCES.....	5
1.3.1	<i>Air Force.....</i>	5
1.3.2	<i>Ground Forces and Special Forces.....</i>	6
1.3.3	<i>Naval Forces .....</i>	9
1.3.4	<i>Airspace / missile defence and surveillance .....</i>	12
1.4	INTERNATIONAL DEFENSE COOPERATION .....	13
1.4.1	<i>NATO Cooperation.....</i>	13
1.4.2	<i>US military presence in Romania.....</i>	14
1.4.3	<i>International missions, trainings &amp; exercises .....</i>	14
1.5	DEFENSE & MILITARY MARKET.....	17
1.5.1	<i>Defense budget and spending .....</i>	17
1.5.2	<i>Romanian defense industry.....</i>	19
1.6	MODERNIZATION AND ARMAMENT STRATEGY .....	27
<b>2</b>	<b>HOMELAND SECURITY .....</b>	<b>32</b>
2.1	INTERNAL SECURITY SYSTEM.....	32
2.1.1	<i>Ministry of Interior .....</i>	32
2.1.2	<i>Romanian Intelligence Service (SRI).....</i>	32
2.1.3	<i>Police Forces.....</i>	33
2.2	DOMESTIC, REGIONAL AND INTERNATIONAL THREATS .....	35
2.3	CRITICAL INFRASTRUCTURE.....	37
2.4	PHYSICAL SECURITY MARKET .....	46
2.5	CYBER DEFENSE & SECURITY.....	47
<b>3</b>	<b>PUBLIC PROCUREMENT SYSTEM .....</b>	<b>51</b>
<b>4</b>	<b>ROUTE TO MARKET AND MARKET OPPORTUNITIES .....</b>	<b>56</b>
4.1	ENTERING THE ROMANIAN MARKET .....	56
4.2	ASSOCIATIONS, PUBLICATIONS AND FAIRS .....	58



# 1 DEFENSE & MILITARY

## 1.1 TRANSITION FROM WARSAW PACT TO NATO MEMBERSHIP

Romania was a founding member of the Warsaw Treaty Organization but President Ceausescu's policy (during the communist era) was to escape USSR influence from a military, industrial and economic point of view. Romania's position in the Warsaw Pact was quite autonomous. At the economic level, Romania started a special relationship with the U.S., becoming the only socialist country from Eastern Europe to obtain the most favored nation clause from the US in 1975. Around 1980, the U.S. had three times higher volume of trade with Romania than with all of the USSR.

After the fall of communism in 1989, Romania started preparing to become a NATO member, initiating diplomatic relations with NATO in 1990 and informing the NATO Secretary General in 1991 of its willingness to engage in close cooperation with NATO.

In 1994, Romania became the first post-communist country to join the Partnership for Peace program; its individual program was signed in May 1995. In 1996, the Romanian Parliament appealed to Parliaments of NATO Member States requesting support for Romania's aspirations to become a NATO member. Still, Romania was not granted membership for many more years.

In the following years, Romania continued to prove its commitment to support NATO activities; the military from Romania and the United States set up an air traffic monitoring center covering the Romanian territory and neighboring areas. In 2001, the Romanian Parliament decided by an overwhelming majority for Romania to participate, as a de facto NATO ally, in the war against international terrorism through all means, including military ones, with Romania being ready to grant access to its airspace, airports, land and sea facilities. At the NATO Prague Summit in 2002, Romania was invited to start accession discussions and the country was finally granted NATO membership in 2004.

After accession, a number of legislative changes were made to harmonize national legislation with the NATO acquis, including the 2003-revised Constitution. Thus, military service in peacetime was no longer compulsory and starting January 1, 2007, Romania has been required to have a professional army. However, in case of war, mobilization and a state of siege, military service will still be mandatory.

Romania's Act no. 384/2006 on the status of professional soldiers and graduates marked a significant achievement in the process of training and developing a modern army with enhanced operational capacity, interoperable with the armies of other NATO member states.

Having gone through a downsizing stage (2005-2007) and NATO and EU operational integration (2008-2015), the Romanian military has recently been going through the last phase of its transformation, which is to be finalized in 2025, and translates into full integration into NATO and the EU.

The GlobalFirepower website currently ranks Romania 47<sup>th</sup> out of 145 countries in terms of military strength. (In 2022, the country ranked 38<sup>th</sup>.) The country would have to heavily rely on NATO support in case of a military attack against Romania.



## 1.2 MAIN BODIES AND INSTITUTIONS

The Supreme Commander of the Romanian Armed Forces (RAF) in time of war is the President of the Republic, Mr. Klaus Iohannis (as of March 2023). The highest military commander is the Chief of General Staff, Army General Daniel Petrescu.

Organization and unitary coordination of activities related to country defense and national security are in the hands of the Supreme Defense Council (CSAT) which is subordinated to the Romanian Parliament. Members of the Supreme Defense Council are:

- Minister of National Defense,
- Minister of Interior,
- Minister of Foreign Affairs,
- Minister of Justice,
- Minister of Economy, Trade and Business,
- Minister of Public Finance,
- Director of the Romanian Intelligence Service,
- Director of the Foreign Intelligence Service,
- Chief of Defense Staff,
- Presidential Counselor for National Security.

Responsibilities of the Supreme Defense Council include, among others:

- Analysis of Romania's national security strategy, military strategy, and public policies
- Approving the Army Endowment Plan<sup>1</sup>
- Coordinating integration in European/Euro-Atlantic security structures, monitoring adaptation of Armed Forces to NATO requirements, formulating recommendations in line with NATO standards

### Ministry of National Defense (MoD)

---

The Ministry of National Defense is a specialized body of the central public administration, subordinated to the Government, which conducts national defense activities. The MoD coordinates the Army, purchases military equipment, and coordinates the import and export of military equipment and technology.

The Ministry of National Defense is responsible to the Parliament, the Government and the Supreme Defense Council for the implementation of provisions of the Constitution, the laws in force, the decisions of the Government and the Supreme Defense Council, and the international treaties ratified by Romania.

<b>Governing body:</b>	Romanian Government
<b>Minister:</b>	Mr. Angel Tilvar
<b>Headquarters:</b>	110 Izvor Str., 050561 Bucharest, Romania
<b>Website:</b>	<a href="http://english.mapn.ro/">http://english.mapn.ro/</a>

---

<sup>1</sup> Army Endowment is regularly used in English-language sources in Romania, even in legislation, to refer to equipment in possession and use by the Romanian army. In order to be consistent with local terminology, we use „endowment“ in this sense in this report.



## Romanian Army

---

The manpower of the Romanian Army counts about 69,300 military personnel in 2023.

The Romanian military is engaged in the integrated NATO military structure contributing to defense operations and civil crisis management. It takes part in joint consultations, participates in joint exercises, and actively commits troops to NATO-led multinational operations.

## General Staff

---

The General Staff is subordinated to the MoD and provides: Command, organization, planning and implementation, gradual increase of readiness levels; RAF's mobilization; conduct of joint operations; HQ and troop training; basic and specialty training of active-duty and reserve military personnel; military personnel individual career management; armaments planning; standardization in the military field; implementation of the C4ISR, logistic and infrastructure system; conduct of international military relations; religious assistance in the MoD; signing technical agreements with other states' armed forces; promotion of military culture and civil education values.

**Chief of Defense Staff:** Army General Daniel Petrescu

## Military Police

---

The Military Police operates within the army structures. Its tasks are to ensure discipline in military premises, surveillance of locations frequented by military personnel, investigation of incidents between military personnel and civilians, participation in peacekeeping missions, providing VIP protection, guarding military facilities, searching missing soldiers, discovering hidden arm deposits or clandestine workshops for gunpowder and explosives production, etc.

**Governing body:** Ministry of Defense



## 1.3 ROMANIAN ARMED FORCES

### 1.3.1 AIR FORCE

The Air Forces' mission is to defend national airspace with air-to-air and ground-to-air means and to support other categories of forces and local authorities in emergency situations.

#### Endowment of the Romanian Air Forces

Romanian Air Forces use the following equipment:

- **Fighter aircraft F-16** (currently 17 units in use): first F-16 Fighting Falcon jets (purchased from Portugal) were brought to Romania in 2016. They were manufactured in the early 1980s and were repeatedly modernized to reach the version F-16 MLU M5.2. In 2020, the U.S. State Department has approved Romania's request for upgrades to the avionics, software, communication equipment, navigational aids, and cockpit of its Mid-Life Update (MLU) Block 15 F-16 aircraft fleet along with additional logistics support. Eight (8) LN-260 Global Positioning System (GPS) and nineteen (19) Multifunctional Information Distribution System Joint Tactical Radio Systems (MIDS JTRS) were included in the aircraft modernization as well as AN/APX-126 Advanced Identification Friend or Foe (IFF); ARC-210 Radios; KIV-78 Cryptographic Appliques; other secure communications, navigation, and encryption devices; Joint Mission Planning System (JMPS) software; aircraft minor modification, integration and test support, support equipment, software and software support; personnel training; spare and repair parts.
- **Fighter aircraft MiG21 LanceR** (MiG21 LanceR B / MiG21 LanceR C): a total of about 29 units in use (of which 20 are optimized for air-air missions). **Note:** a 2022 decision of the Supreme Council for National Defense stipulated that Romania's MiG-21 LanceR fighter aircraft should be officially removed from service in May 2023.
- **Cargo/transportation aircraft C-130 Hercules** (3 units in service + 1 used for spare parts): maintenance, service and repairs of C130 aircraft is done by Romaero Baneasa ([www.romaero.com/](http://www.romaero.com/))
- **Cargo/transportation aircraft C-27-J Spartan** (7 units) - ongoing process of upgrading the avionics system by 2027
- **Cargo/transportation aircraft An-26** (2 units)
- **Trainer aircraft/reconnaissance aircraft IAR 99** (10 pcs) / **IAR 99C** (11 units) – to be upgraded to Super Soim standard with modern avionics. In 2020, a contract for **Avioane Craiova** was signed **to upgrade 10 IAR 99 Soim aircraft to be used for the training of future F-16 pilots:** standard IAR-99s to be equipped with advanced avionics and Embedded Virtual Avionics training systems, as well as Close Air Support and Air to Air capabilities.
- **Trainer aircraft Iak-52:** 12 units (license-built by the Romanian Aerostar company)
- **IAR 316 - training helicopter:** 6 units, built in Romania
- **IAR 330 PUMA L/M - utility helicopter:** 35 units, built in Romania
- **IAR 330 SOCAT – attack helicopter:** 22 units, built in Romania
- **UAVs: RQ7 Shadow 600:** 7 in use (from an initial number of 11, 3 have crashed in Iraq and 1 in Romania)
- **UAV Scan Eagle:** 10 pcs
- **57 mm anti-aircraft gun S60** (Soviet design): 250 units (to be replaced by SHORAD systems)
- **Surface-to-air missile MIM-23:** 8 units in use (bought from Holland as HAWK PIP III and later modernized by Raytheon to the HAWK XXI standard).



- **Surface-to-air missile S-75 M3 Volhov** (Soviet production): 6 units (delivered by USSR in the 1960s, modernized three times in the meantime; towed to Soviet era ZIL 131 trucks.
- **AN / FPS 117** three-dimensional air search radars of US production: 10 units (in use since 1998)
- **TPS 79R** three-dimensional air search radars: 19 units in service since 2004. Towed to DAC 665 T utility truck.
- **P 18** (2-dimensional air search radars of Soviet production): in service since 1977 (mounted on Ural 375 D chassis)
- **Surface-to-air missile MIM 104 PATRIOT**: 7 systems have been ordered, out of which 4 will be used by Air Forces.
- Reconnaissance aircraft- **Northrop Grumman RQ 4 Global Hawk**

Romania is now negotiating a potential purchase of H145M and H215M helicopters from Airbus Helicopters.

---

### 1.3.2 GROUND FORCES AND SPECIAL FORCES

The Romanian Ground Forces is the largest service branch of the Romanian Armed Forces by number of troops, counting between 39,000 and 43,000 professional soldiers.

The Special Operation Forces are a specialized body comprising elite, fast reaction commandos which can carry out raids by air, land, and sea. The Romanian Special Operations Forces have been working with NATO since 2003, already before Romania joined the Alliance.

Currently, the Romanian Ground Forces have approximately 2,000 armored combat vehicles in their inventory, including more than 700 tanks and over 1,000 8x8 and 4x4 armored personnel carriers. However, these armored combat vehicles are old models, technically obsolete.

In total, the Romanian Army is likely to have approx. 720 tanks, but the exact figure has not been made public and, given the models and the age of these vehicles, it is expected that many of them are not operational.

According to GlobalFirepower, Romania has 413 tanks in use, of which 54 are of Romanian production (TR 85 M1 - also named "Bizon", modernized to meet NATO standards). Other tanks owned by the Romanian Army (in use or/and in storage) are: the **Romanian TR 85** (227 units), **the Romanian TR 580** (Romanian version of T-55: 42 units); **the Soviet T-55** (AM/AM2): 394 units. In 2016, a total of 500 U.S. tanks (M1 Abrams) were brought to Romania to strengthen the NATO force. In late 2022, France deployed in Romania a squadron of Leclerc tanks and an air defense system as part of NATO's Eastern flank defensive positioning.

According to a convention signed after 1990, Romania is entitled to have 1,350 operational tanks. Therefore, plans were announced in 2017 that the Romanian Army would purchase additional 270 armored vehicles to create six tank-battalions by 2027.

Purchase of a **battalion of Abrams tanks (54 pieces)** is currently being approved in the Romanian Parliament.

Other military equipment in possession of the Romanian Ground and Special Forces are:

- **1 HIMARS system** (and 2 others to be delivered in the near future)
- **Infantry fighting vehicles**: Romanian MLI 84 (23 units) and MLI 84 M JDER (99 units)



- **Romanian-built MLVM armored personnel carrier:** 75 units (MLVM, MLVM M, MLVM-AR, ABAL, Ambulance)
- **TAB B 33 “Zimbru”** (armored personnel carrier built in Romania under BTR 80 license with modifications): 65 units
- **TAB 77** (armored personnel carrier built in Romania as a modified version of BTR 70): 155 units
- **TAB 71** (armored personnel carrier built in Romania under BTR 60 license with modifications): 401 units, to be replaced by TBT 8X8
- **TAB C 79** (armored personnel carrier built in Romania): 391 units
- **Anti-aircraft missile system 2K12M - KUB (SA - 6):** 40 2K12 Kub vehicles comprising eight batteries.
- **Anti-aircraft missile system OSA-AKM 9K33M3 (SA-8):** 28 vehicles totaling four batteries.



- **Engineering vehicles** built in Romania: **DMT-85 M1** (5 units built in Romania between 2007-2009), TEHEVAC MLI-84M
- **AMT125** and **AMT 950** Romanian-built crane truck used by military engineering units
- **Auto Greder** (Romanian-built road grader) - used by military engineering units
- **Bulldozers** of Romanian production - used by military engineering units
- **VW Transporter (SIBCRA van)** - Sampling and Identification of Biological, Chemical and Radiological Agents vehicle
- **BPZ-2** German armored recovery vehicles: 3 units
- **Chevrolet LSSV Tahoe** equipped with Harris radio equipment: 13 units
- **Land Rover Defender** – used by Military Police
- Romanian-built **trucks: DAC** (352 units) / Roman (124 units)
- **Iveco trucks** – 300+ units
- **Mowag Piranha (Piranha IIC):** 43 pcs (wheeled)
- **Mowag Piranha (Piranha V):** 94 pcs (to which another 133 will be added in the coming years based on a contract signed in 2017; additionally, in 2023, it has been decided on the purchase of another 150 units)
- **3 PATRIOT systems**





- Small number of **HMMWV vehicles** of U.S. production
- **URO VAMTAC multipurpose armored vehicle** (S3, S3 HD): 62 units, mainly used by the Special Forces
- **Wolf Armored Vehicles**: 3 units used by Military Police
- **Panhard PVP multipurpose armored vehicles**: 16 units
- **International Maxx Pro** (mine resistant ambush protected vehicle): 60 units, provided by the USA, used by ISAF troops in Afghanistan
- **Oshkosh M-ATV** (mine resistant ambush protected vehicle): provided by the USA, used by ISAF troops in Afghanistan
- **Cougar 6x6 and MaxxPro Dash MRAP** (Mine-Resistant Ambush Protected) vehicles offered by the United States for use in the theaters of operations.
- **35mm Oerlikon twin-cannon**
- **Harris and Panther radio stations**



- **Assault boats** of Romanian and French manufacture
- **Utility armored motorboats** of Romanian production
- **Self-propelled barges MLC 240 / ferryboats MLC 300** - of Romanian production
- **Mortars** of Romanian production
- **Howitzers** of Romanian production (built on Soviet /Yugoslav license)
- **Multiple rocket launchers: LAROM** (54 units), **APR 40** (134 units)

- **100 mm towed anti-tank gun (model M1977** built in Romania): 208 units - upgraded with modern day and night fire-control system
- **Spike anti-tank missiles** (over 2,000 units) – used for example on MLI 84 M JDER and IAR 330 PUMA SOCAT
- **Rocket-propelled grenades** of Romanian production
- **Anti-tank missiles** (9K 111 Fagot) of Soviet production
- **Light anti-tank weapons (M72A5 LAW)**: 24 units purchased from Norway and used by Special Forces
- **Anti-aircraft guns and machine-guns** of Romanian production
- **72 “Oerlikon GDF 203” anti-aircraft guns**
- **Self-propelled anti-aircraft guns (Gepard)**: 36 units + 7 vehicles for spare-parts
- **Surface-to-air missiles** of Soviet production
- **Amphibious short range surface-to-air missile systems** of Romanian production: 48 units (model CA 95)
- **Pistols, assault rifles and light machines guns** are mainly of Romanian production
- **M249 light machines guns** – U.S. version of FN MINIMI – are being used by Special Forces.
- **M240 machine guns** of U.S. production (installed on HMMWVs)
- **Small number of Browning M2HBQCB** heavy machine guns
- Special Forces use US-manufactured **sniper rifles (Armalite AR 10, SuperSASS / Barret M82)**

### 1.3.3 NAVAL FORCES



Romania’s access to the Black Sea and over 1,000 km of natural border formed by the Danube River contributed to the development of shipbuilding in this country since the mid-19<sup>th</sup> century.

The **Romanian Shipbuilders Association** (ANCONAV) presents Romania as one of the top 5 shipbuilding countries in Europe, with 9 active shipyards (5 of them having over 100 years of history) and employing over 27,000 workers in this field. Over 80% of production is exported. Romania accounts for about 5% of the European ship production. The shipbuilding industry generates about 5% of the Romanian GDP.

During the past 30 years, the working portfolio of the Romanian shipyards has diversified and Romania became known as an important player in the offshore and military industry.

The Romanian Navy - Fleet Headquarters is in Constanta, which is the largest and deepest port in the Black Sea, home to one of Europe’s largest shipyards, the Constanta shipyard (85,000 sqm). The **Romanian Naval Forces** also include a **Frigate Flotilla**, an **Operational Command Group**, and a **River Flotilla** (Danube River). The 307th Marine Infantry Battalion operates as a Special Forces Unit.

### Danube River and the Black Sea Region



Photo: totb.ro

Of all the Romania's military services, the Navy is the smallest. It comprises only about 7,000 personnel, yet is the most technically and professionally demanding of the three.

A video documentary dated December 2018 describes the Black Sea as a very crowded place in terms of submarines (with e.g. Russia operating 6 very modern submarines and Turkey operating German-type submarines). The same documentary states that the Black Sea has very special features, namely its salinity degree and the lack of oxygen at great depths allows submarines to hide better than in other seas and **become invisible to sonars**.

The Romanian Navy fleet includes:

- **3 frigates** which have the capacity to carry helicopters - each one comes with an "IAR 330 Puma Naval" helicopter. Out of these 3 frigates, one is of Romanian production. The other two (ex UK Type 22) were initially planned to be modernized by the end of 2019; however, the public tender has been at a standstill since 2018.
- **4 corvettes (Tetal I/II)** - The Corvette Squadron's primary mission is **antisubmarine warfare**, while anti-surface warfare comes second. The ships of the squadron are tasked with patrolling Romania's exclusive economic zone and securing sea lanes. All the squadron's ships were designed and built in Romania during the 1980s and 1990s: 4 corvettes and 3 torpedo-boats. The squadron's capabilities to conduct its primary mission, anti-submarine warfare (ASW) as well as its secondary mission, anti-surface warfare (ASuW), are limited by the **obsolete weapons and sensor suits** of its ships. The tender for purchasing 4 new multifunctional corvettes to replace the old ones by 2026 (the first corvette to be delivered by 2022) was won in December 2018 by the Naval Group (France) – Constanta Shipyard (Romania) consortium. However, due to the appeal filed in court by Damen (Dutch owner of 2 big shipyards in Romania), who also participated in the tender, the procedure was put on hold and has not been resumed since.
- **1 Kilo class submarine** that is held in reserve and could be reactivated if funds become available. In 2022, the MoD signed a letter of intent to buy French-made Scorpene class submarines and helicopters.





- **6 naval missile ships:** Tarantul I class fast attack crafts / mobile 4K51 Rubezh coastal defense systems.
- **1 minelayer and 4 minesweepers** (of Romanian production).
- **Romania's Danube flotilla** is the strongest and most powerful force of its kind in NATO and Europe. It includes **3 river monitors** and **5 armored gunboats**. Both types of ships are heavily armed and armored. All ships are equipped with 100 mm cannons and 122 m Grad rocket launchers as well as light artillery of various calibers. They were designed and built in Romania in the late 1980s and early 1990s. Their weapons systems are of Romanian design and manufacture which greatly facilitates maintenance and supply, however, they are in Warsaw Pact calibers. Additionally, the ships suffer from a lack of modern sensors and air defenses. A further drawback is that their anti-aircraft armament is manned and not automated, thus negating some of the protection offered by the armor. A limited modernization has begun (equipping these ships with new engines, wiring, modern navigation systems, radar and forward-looking infrared (FLIR) systems). However, no major upgrade of their weapons systems has been announced for the near future.
- The Danube flotilla also includes **12 patrol ships**
- **4 anti-ship mobile missile launchers** of Soviet production
- **Auxiliary vessels** of Romanian production

According to Omar Lamrani (Stratfor, 2016), in terms of overall capability, the Romanian Navy significantly lags behind the Turkish and Russian navies in the Black Sea, is of comparable strength to the Bulgarian Navy, and significantly ahead of Ukraine and Georgia. The vast majority of Romania's current vessels were built in the 1970s and 1980s. Therefore, Romanian vessels are aging, and much like its air force, in need of upgrading and replacement. Romania has a good number of frigates, corvettes, and minesweepers (though aging), but is considerably disadvantaged by very minimal naval aviation, very weak naval surface-to-air defense, and mediocre anti-submarine capability. Romania also lacks an effective submarine force.

Despite the statement of the Romanian Ministry of Defense dated Feb. 2018 which then emphasized then that "the modernization of Romania's navy can no longer be postponed: in order to strengthen Romania's strategic position in the Black Sea, we need efficient naval forces", and moreover despite Russia's increasing aggressivity in the Black Sea, Romania's plans to modernize its Naval Forces and increase its naval fleet strength have come to a standstill.

As a consequence, the Romanian Navy still relies mainly on old armament systems of Soviet origin, which have no credibility in the event of a conflict, especially since Russians know how to neutralize the equipment on the ships operated by the Romanian Navy.

In January 2023, the Naval Forces emphasized again the need to accelerate modernization plans to better face the increasing Russian threat and to honor the country's commitments to its EU and NATO partners to a better degree. The MoD have announced new plans to break the deadlock and finally move forward with its Navy modernization plans. Therefore, the Parliament is expected to soon give their approval for heavy government investments in this direction.

### 1.3.4 AIRSPACE / MISSILE DEFENCE AND SURVEILLANCE

The Deveselu Air Base near Caracal hosts the first operational Aegis Ashore Missile Defense System in Europe (a second one is being built in Poland but is not yet operational). The Aegis Ashore Missile Defense System has many of the same components used at sea on guided-missile destroyers and cruisers but has been adapted to perform the ballistic missile defense mission from land. The Aegis ashore system in Deveselu is part of the European Phased Adapted Approach (EPAA). EPAA is designed to protect European NATO allies and U.S. Forces deployed in the region against current and emerging ballistic threats from the Middle East.

The land-based ballistic missile defense capability uses a defense system almost identical to that used on the U.S. Navy Aegis-capable guided-missile destroyers and cruisers. The system is designed to detect, track, engage, and destroy ballistic missiles in flight.



Approved for Public Release 13-MDA-7431 (5 September 13)

The site consists of a fire-control radar deckhouse and associated Aegis command, control, and communications suite. Separately, it houses a number of launch modules containing SM-3 interceptors. SM-3 interceptors are intended for defensive purposes only and have no offensive capability. They carry no explosive warheads of any type, and rely only on their kinetic energy to collide with and destroy incoming enemy ballistic missile warheads.

According to the U.S. Embassy in Romania, Aegis Ashore Romania is fully operational and fully funded, it is a critical contribution of the United States and Romania to NATO Ballistic Missile Defense and pending legislation in the FY18 National Defense Authorization Act considers additional air defense capabilities for the base in Deveselu.

The U.S. Ballistic Missile Defense site has approximately 430 acres (175 hectares) and is located within the existing Romanian Air Base at Deveselu. An estimated 200 military, government civilians, and support contractors operate the U.S. facility at the site.



## 1.4 INTERNATIONAL DEFENSE COOPERATION

### 1.4.1 NATO COOPERATION

Romania has been and remains a steady contributor to and beneficiary of defense and security measures adopted since 2014, which aimed at boosting the security of the Alliance and, implicitly, of the nation. The proactive efforts at the military, political-military and diplomatic levels helped to achieve a strengthened Allied presence on the Romanian territory and in the Black Sea region.

As a result, two new multinational entities were established as part of the NATO Force Structure – **Multinational Division Southeast** (MND SE) and the **NATO Force Integrated Unit** (NFIU), both located in Bucharest, meant to support NATO's missions in the South East of the Alliance.

In addition, a tailored forward presence was established in the land, air and maritime domains based on a set of proposals advanced by Romania. As part of this presence, a Multinational Brigade located in Craiova and a Combined Joint Enhanced Training Initiative (CJET) are being made operational, thus creating a framework through which Allies can affiliate and send troops to Romania for integrated training, in order to increase their interoperability and defense capacity.

Other decisions were aimed at increasing the Allied air and maritime presence and on the establishment of a coordination function for maritime activities in the Black Sea. This will result in integrated training and more exercises with the participation of the NATO Standing Naval Forces, alongside the vessels of the Allied riparian states and other interested Allies. NATO will ensure the coordination of maritime activities in the Black Sea, allowing for better surveillance and reconnaissance of the situation in the region, as well as for a coherent and unitary approach between NATO activities in the Black Sea region and all other Alliance maritime activities.

In parallel with efforts to increase security in the Black Sea, Romania contributes to the implementation of enhanced forward presence with a unit deployed in Poland, together with Croatia and the United Kingdom, within the U.S.-led battlegroup. (The Romanian Army's "Blue Scorpions" provide air-defense capabilities to the Battlegroup).

Romania is a pillar of NATO's security in southeastern Europe and plays an important role in the NATO air defense. Mihail Kogălniceanu airport is a major transit hub near the Black Sea and the United States is currently upgrading Campia Turzii to bolster U.S. and NATO air capabilities. The U.S. has invested more than USD 130 million (i.e. the largest U.S. investment in Europe in 2021) in a construction project meant to turn the former Soviet base of Campia Turzii in central Romania into a new major hub for NATO aircraft in the Black Sea region ( a "rotational hub" where deployed troops and aircraft would cycle through Europe).

In 2022, at the June NATO Summit in Madrid, President Biden announced that the United States would headquarter a rotational Brigade Combat Team (BCT) in Romania.

**Starting October 2019, the Romanian diplomat and politician (Mr.) Mircea Geoana holds the position of NATO Deputy Secretary General. In recognition of his service, NATO have extended his term as Deputy Secretary-General, until mid-October 2024.**



### 1.4.2 US MILITARY PRESENCE IN ROMANIA

Romania and the U.S. have a strategic partnership and Romania encourages U.S. military activities on the country’s territory, be it in an allied or bilateral framework, and the increase of U.S. military presence and equipment in the country.

In early 2018, Romanian Defense Minister Mihai Fifor asked for a permanent U.S. military presence at the Mihail Kogalniceanu military base near Constanta in Eastern Romania – the U.S. has been using this base for the last 25 years and has also invested in its modernization and expansion. The U.S. military presence at this base has grown in recent years as tensions between NATO and Russia have increased.

In September 2019, Romania’s Defense Ministry announced its plan to rebuild the Mihail Kogalniceanu military base to NATO standards and increase its capacity. The costs of this project are estimated at USD 3 billion over a period of 20 years and will be covered from the state budget.

Approx. 4,000 members of the U.S. Army’s 101st Airborne Division have been deployed in Romania since the summer of 2022 (and will remain there until September 2023) as part of the military build-up in Eastern Europe. The New York Times reported that some of the 101st soldiers are stationed near Constanta on the Black Sea while others are further north, just a few miles from the Ukrainian border, simulating fighting with Russia in Ukraine.

The deployment marks the first time the 101st has been sent to Europe since World War II.

### 1.4.3 INTERNATIONAL MISSIONS, TRAININGS & EXERCISES

Participating in missions and operations outside the Romanian territory began in 1991, with the United Nations UNIKOM mission in Kuwait, following the Gulf War developments. Over time, Romania’s participation in missions has constantly increased. Its Armed Forces participate in counter-terrorism, peacekeeping and humanitarian assistance international missions organized by NATO, the EU and the UN.

The most substantial and also longest Romanian participation abroad was ISAF, a NATO-led mission in Afghanistan. The country’s participation began in 2002 (even before the country became a NATO member) with a military police platoon and a C130 aircraft, which was constantly developed and reconfigured in accordance with the requirements of the theater of operations. In their turn, the Air Force and the Naval Forces deployed a part of their forces in various theatres of operations.

The table below presents the Romanian Army troops’ participating in missions and operations abroad:

	Location	Aegis	Mission / operation	Staff
1	USA/Tampa	NATO	USCENTCOM - general staff and liaison staff	3
2	Belgium/Brussels	NATO	General staff - augmentation of VNC Commands	3
3	UK/ Northwood	NATO	General staff - augmentation of VNC Commands	1
4	Napoli	NATO	Liaison staff	1
5	Moldova/Chisinau	NATO	Political officer within the liaison office NATO-VNC	1
6	Mediterranean Sea	NATO	Standing NATO Mine Countermeasures Group Two – General staff	2
7	Turkey	NATO	SEA GUARDIAN	2
8	Turkey	NATO	Liaison officer	1
9	Poland	NATO	eFP – Air Defence Detachment	105
10	Kosovo	NATO	KOSOVO FORCE - KFOR	65





11	Iraq	NATO	General staff - IRAK (NMI)	3
12	Iraq	NATO	DCM-E	6
13	France	NATO	Liaison – TF TAKUBA	1
<b>TOTAL: MISSIONS LED BY NATO</b>				<b>194</b>
14	Bosnia Herzegovina	EU	EUFOR – ALTHEA	213
15	Spain/ Rota	EU	ATALANTA – General staff OHQ UE	1
16	Mediterranean Sea	EU	EUNAVFOR MED	3
17	Brussels/Bangui	EU	EUTM (RCA) – training and advice	9
18	Georgia	EU	EUMM – observation and monitoring	1
19	Belgium/Mons	EU	Upper echelon for KFOR - staff personnel	1
20	Somalia	EU	EUTM-- training and advice	4
21	Mali	EU	EUTM-- training and advice	24
22	Mozambique	EU	EUTM-- training and advice	6
<b>TOTAL: MISSIONS AND OPERATIONS LED BY EU</b>				<b>262</b>
23	Congo	UNO	MONUSCO – observation and monitoring	8
24	Kosovo	UNO	UNMIK - observation and monitoring	1
25	India-Pakistan	UNO	UNMOGIP - observation and monitoring	2
26	New York	UNO	DPKO	1
27	South Sudan	UNO	UNMISS - observation and monitoring	6
28	Mali	UNO	MINUSMA - observation and monitoring	4
<b>TOTAL: MISSIONS AND OPERATIONS LED BY U.N.O.</b>				<b>22</b>
29	Jordan	Coalition	Gallant Phoenix Operation	1
30	Iraq	Coalition	Inherent resolve	1
<b>Total staff participating in all missions and operations</b>				<b>480</b>

*Source: Ministry of National Defense, information updated October 3<sup>rd</sup>, 2022*

Consistent participation was provided in the NATO air policing mission, performed over August – October 2007 in the Baltic countries, with a 65-soldier detachment and 4 MIG 21 L aircraft.

The crises that occurred in several countries in the Middle East and North Africa required Romania’s participation in the “Unified Protector” NATO operation, between April and July 2011, aimed at imposing an arms embargo on Libya. The mission was performed on the 221 “King Ferdinand” Frigate (with a 207-soldier crew) and it actively contributed to the Alliance’s effort to resolve the conflict.

Romanian Armed Forces’ missions have evolved throughout the last 25 years from simple to complex ones, from individual missions carried out with observers to missions conducted with contingents of more than 2,000 soldiers, and also from medical assistance missions to counter-insurgency and finally to institutional assistance and training missions.

Land, Air and Naval Forces have participated in over 100 multinational exercises and training activities planned and conducted in cooperation with allied states and partners. The Black Sea Rotation Force, Resolute Castle, Saber Guardian, Noble Jump, Spring Storm, Swift Response, Poseidon, Breeze, Sea Shield, Standing NATO Mine Countermeasures Group Two (SNMCMG2), REPMUS 22, DYMS 22, Bomber Task Force training missions, Atlantic Resolve 23 or Defender Europe 23 are only a few examples of exercises in which the Romanian Forces have participated.

Between 2004 and 2021, Romania participated in peacekeeping missions with 40,000 soldiers (observers, senior officers, liaison officers, military police, combat units and subunits, or campaign hospitals), ranking first among the Member States contributing to operations, as summarized below:



## Afghanistan

---

Romania ranked 7th in terms of contribution to the ISAF missions, both in terms of the number of military personnel deployed and the complexity of the executed mission. An important contribution was provided by the Romanian Air Force's command at Kabul International Airport (KAIA) between April 2011 and April 2012, in two rotations of six months, with 75 per-captains. Romania's participation peaked in 2011 with two maneuvering battalions in Zabul province and other elements totaling 1,800 soldiers and command of the Kabul International Airport for one year (150 soldiers).

Romania participated in the Afghanistan missions between 2002 and 2021, with a total of 32,000 soldiers who took part in the Enduring Freedom, International Security Assistance Force, or the Resolute Support operations.

## Iraq

---

Romania was present in Iraq for more than six years, from March 2003 to July 2009. Simultaneously with a contribution of forces to the IRAQI FREEDOM Coalition, the Army also participated with instructors in the second mission in NATO Training in Iraq (NTM-I) from January 2005 to November 2011. Between 2003 and 2009, nearly 10,000 soldiers performed missions in this theater of operations.

## Western Balkans

---

The Romanian Army has participated in missions in both Bosnia and Herzegovina since March 1996 and in Kosovo since March 2000. The KFOR mission involved 68 soldiers, including key personnel and intelligence elements, as well as a maneuver company (128 soldiers) within the Strategic Reserve of SACEUR, deployed exclusively in the Kosovo operations area.

**NATO Air Force for the Baltic Countries** – between August and October 2007, four MIG 21 LANCER airplanes participated in the NATO Air Force mission for the Baltic countries "BALTICA 07".

**Active Endeavor** – Romania participated regularly from 2005, with a Type 22 frigate at Active Endeavor in the Mediterranean and in the NATO Embargo on Libya (Unified Protector) for three months in 2011.

**Active Fence** – Romania participated between April and July 2013 in the NATO Active Fence operation in Turkey providing communications support for U.S. Air Force units.

Besides the Forces deployed in the theaters of operations, Romania has a contingent of 800 soldiers assigned to the NATO Response Force. As an EU member, Romania fully supports the Common Security and Defense Policy. In this respect, Romania contributes to the EU-led missions in the Mediterranean Sea, Aden Gulf, Georgia, the Central African Republic, Somalia and Mali with soldiers, staff personnel and instructors. Together with Greece (framework nation), Bulgaria and Cyprus, Romania contributed 68 soldiers to the UEHELBROC Combat Group.

Romania participated in the UN (Congo, Kosovo, Ivory Coast, Republic of Liberia, South Sudan, Afghanistan and Mali) and OSCE (Ukraine) observation missions with 42 observers, monitors, staff and liaison personnel. The smaller number of personnel participating in UN missions is due to the fact that Romania's Armed Forces' main effort was focused on supporting higher-level intensity missions, especially the NATO operation in Afghanistan.

Training and simulations for international missions take place at Cincu Combat Training Center.

## 1.5 DEFENSE & MILITARY MARKET

### 1.5.1 DEFENSE BUDGET AND SPENDING

Starting with 2023, the Romanian Defense Budget has increased from 2% to 2.5% of GDP (with a commitment to maintain this percentage of GDP for the next decade), with 30%+ of the budget allocated for procurement of modern equipment for the Armed Forces. Thus, for 2023, the defense budget has been set at RON 38.7 billion (USD 8.4 billion). Romania's decision to increase its military spending is a result of recent events in the Black Sea region.

Defense spending in absolute numbers:

		2015	2016	2017	2018	2019	2020	2021e	2022e
Defense spending	<b>RON (MM)</b>	<b>10,337</b>	<b>10,738</b>	<b>14,765</b>	<b>17,183</b>	<b>19,527</b>	<b>21,431</b>	<b>22,027</b>	<b>26,398</b>
	y-o-y	-	+3.87%	+37.5%	+16.4%	+13.6%	+9.8%	+2.8%	+19.8%

Source: NATO data and own calculations

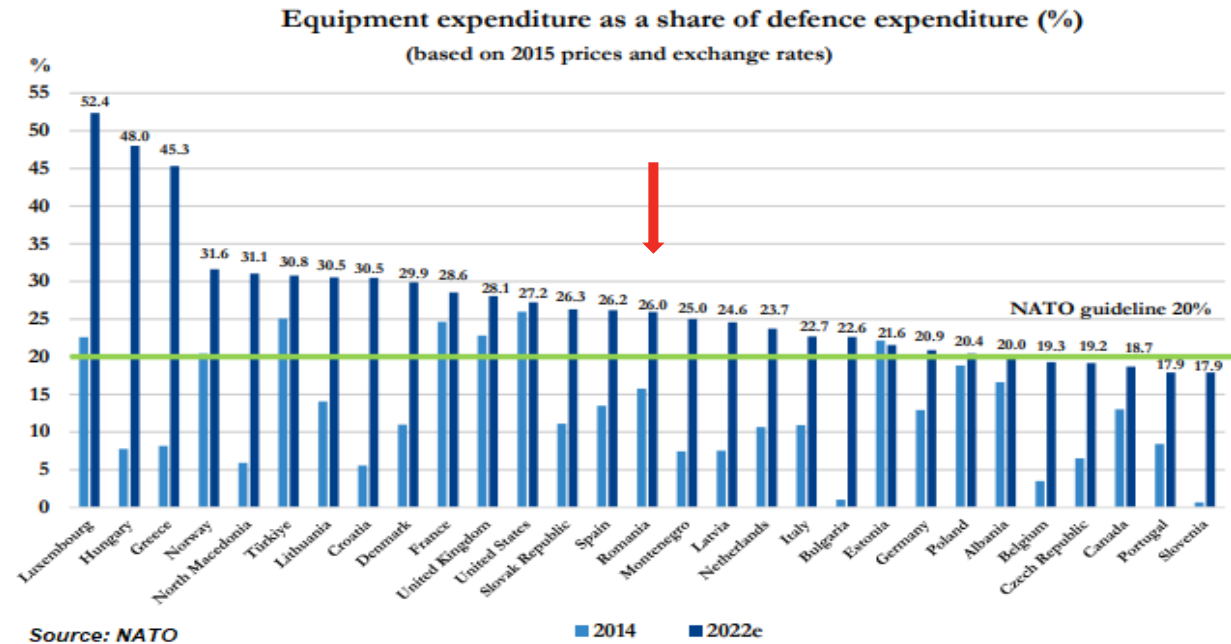
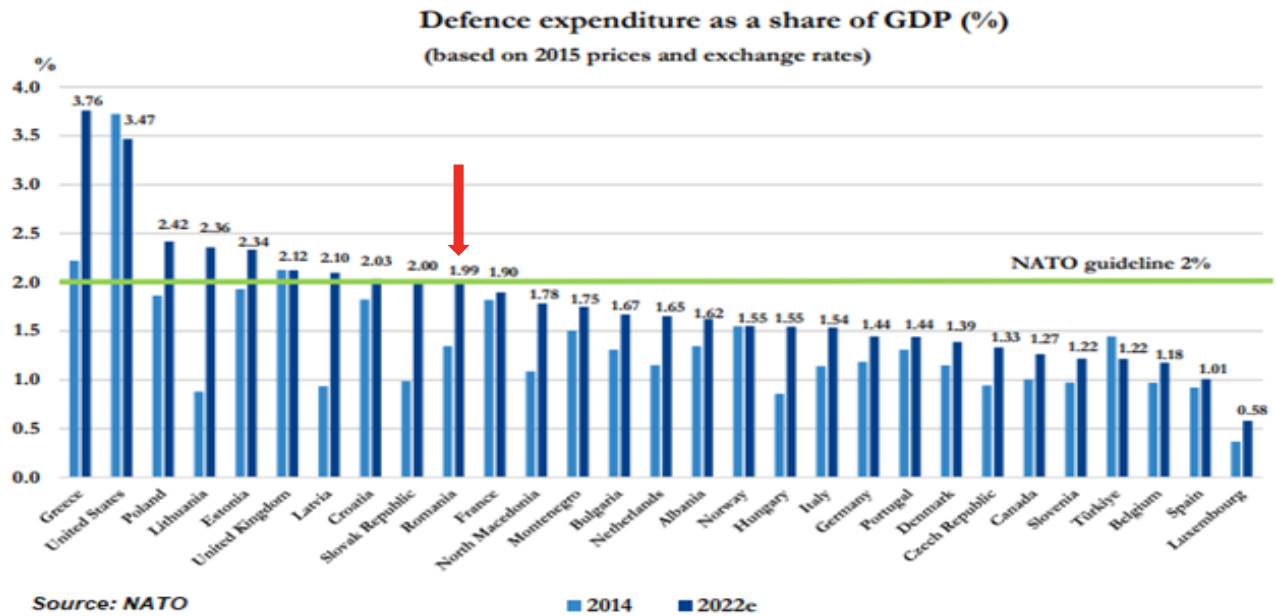
#### Distribution of defence expenditure by main category

	Percentage of total defence expenditure									
	2014	2015	2016	2017	2018	2019	2020	2021e	2022e	
Equipment	15.77	19.65	20.43	33.34	33.47	25.59	23.12	21.57	25.96	
Personnel	71.15	63.30	65.01	54.67	54.48	57.90	59.20	57.80	51.91	
Infrastructure	1.09	1.27	2.77	2.09	1.54	3.53	4.29	7.06	7.75	
Other	11.98	15.78	11.79	9.90	10.51	12.99	13.38	13.57	14.38	

Source: NATO data



In **2022**, Romania's defense spending came very close to the target of 2% of GDP:





## 1.5.2 ROMANIAN DEFENSE INDUSTRY

Romania has strong background in military production. Before the 1989 revolution, its nationalistic communist authorities were keen to preserve independence from the USSR, making and selling arms in exchange for hard currency. Communist Romania became one of the top ten weapon exporters at that time. Throughout the 1990s, however, military sales went down, and many factories closed. Attempts to revive the industry have been ongoing since 1997, but have faced various challenges including corruption.

High budgets allocated to the defense sector in recent years have been used for imports of equipment instead of investments into local production capabilities.

European Union's plans to relaunch the continental heavy munitions industry could also jumpstart revitalization of the Romanian defense industry.

As stated by the Internal Market Commissioner Thierry Breton on April 11, 2023, "Romania is able to play a more significant role in Europe's defense industry". This statement also comes after the recent announcement of the German group Rheinmetall that plans to build a hub in Romania to service Ukraine's military equipment. The hub, to be located near the border with Ukraine, will provide services for self-propelled howitzers, Leopard 2 and Challenger tanks, Marder infantry fighting vehicles, Fuchs armoured transport, vehicles and military trucks.

The government-operated defense industry producers are coordinated by the Romanian Ministry of Economy and managed by the state enterprise ROMARM (which currently has 15 subsidiaries). ROMARM faces significant technology and management problems and only a few of its subsidiaries are still efficient.

Presented below are state-owned as well as private companies active in the Romanian defense industry.

### **ROMARM (STATE ENTERPRISE)**

<http://romarm.ro/>

The state enterprise ROMARM is the main Romanian supplier of defense technology and services and is well known all over the world, with a constant presence in over 50 markets in Europe, North America, South America, Asia and Africa. ROMARM has 15 subsidiaries, as follows (in alphabetical order):

#### **Arsenal Resita S.A.**

[www.arsenal.ro](http://www.arsenal.ro)

Established in 1972; ISO 9001:2001 certified. Produces 25 mm automatic cannon (KBA type), anti-aircraft cannon (2x35 mm caliber), two-barrel anti-aircraft cannon (type GDF 103 AA, 35 mm), mountain cannon 76mm, anti-tank cannon, 130 mm cannon, 152 mm howitzer cannon. In 2021, Arsenal Resita employed 31 people and had a turnover of RON 0.98 million (USD 0.2 million).

#### **Bucharest Mechanical Factory ("Uzina Mecanica Bucuresti - UMB")**

<http://roumb.eu/>

Established in 1978 under the name "Special Heavy Machines Factory", the factory covers an area of approx. 20 ha. Its activities currently include research, design, production, repair and upgrading of armored vehicles. The company will also assemble Piranha V vehicles bought by the Romanian Army (in this regard a joint-venture with General Dynamics European Land Systems was created in 2022). UMB has produced tank models TR-580 and TR-85, tank prototype TR-125 and PMA-50, evacuation and repair tractors TER-85. UMB is the producer of the modern tank model TR 85 - M1 (a modernized version of the TR-85) also called "Bizon". The company has also designed and manufactured two by-products on the TR-85M1 tank chassis, namely the mobile assault bridge and the tank evacuation and repair tractor. With 181 employees, UMB had a turnover of RON 8.3 million (USD 1.8 million) in 2021.



**Carfil S.A.**

[www.carfil.ro](http://www.carfil.ro)

Carfil was established in 1922 under the name "Machine and foundry factory Dumitru Voinea". In 2005, the company started the production of NATO-compatible armaments and ammunition. Since 2006, Carfil has been providing service and maintenance services for armaments in peacekeeping areas. The company is ISO 9001:2015 / AQAP2110:2016 certified. In 2021, Carfil employed 359 people and had a turnover of RON 14.5 million (USD 3.15 million).

**Cugir Arms Factory ("Fabrica de Arme Cugir")**

[www.facugir.ro](http://www.facugir.ro)

Factory established in 1799; producer of the first Romanian machine gun - Parabellum, type "Orita", 9mm caliber. Producer of infantry weapons, weapons for civilian market, sniper rifles and machine-guns. However, the company has not been producing for the Romanian army for years. In 2004, military and civilian production were separated. Cugir has two armaments factories, but neither has been modernized. The Weapons Factory survived on sales for the overseas civilian market. The Cugir Arms Factory exports arms to the American company Century International Arms based in Georgia (and then some U.S.-made components are added to these arms to make them into real combat weapons). The latest contract was signed in May 2021 (worth USD 16 million) for a period of 1 year. In total, there were about 30,000 machine guns produced. Cugir Arms Factory had 853 employees and sales of RON 66 million (USD 14.5 million) in 2021.

**Cugir Mechanical Plant**

[www.umcugir.ro](http://www.umcugir.ro)

Producer of NATO type ammunition (pistols, machine-guns, air-to-air cannons, link belts, etc.). In 2021, the Cugir Mechanical Plant employed 914 people and had a turnover of RON 81.6 million (USD 17.75 million) in 2021.

**Fagaras Powders Plant (Fabrica de Pulberi Fagaras)**

[www.fabricapulberi.ro](http://www.fabricapulberi.ro)

The only manufacturer of high-powered explosives and solid propellers in Romania with clients from Europe, the U.S., and Asia. This production was stopped for a number of years. Plans to resume the production were announced in 2017. A memorandum was signed with the German company Rheinmetall for the reconstruction of the factory and in 2020, the former Ministry of Economy announced the allocation of approx. USD 25 million (out of an estimated total amount of USD 41 million needed). However, in late 2020, a new minister failed to allocate the funds and Rheinmetall broke the memorandum in the end.

Fagaras Powders Plant employed 160 people and had a turnover of RON 2.9 million (USD 0.6 million) in 2021.

**Electromecanica Ploiesti**

[www.elmecph.ro](http://www.elmecph.ro)

The only producer of rockets and missiles in Romania. The factory is focused on armored, support and artillery rocket technology. The equipment it produces is mainly military, such as anti-tank missiles, air-to-ground missiles, radio-controlled AA missiles, and partly civil, such as anti-hail missiles. In May 2022, a memorandum of understanding was signed between the state company Romarm, its subsidiary Electromecanica Ploiesti, and Raytheon Missiles & Defense, according to which Electromecanica Ploiești and Raytheon will manufacture SkyCeptor missiles in Romania (the interceptor missiles will be delivered to the domestic and foreign markets). According to the Minister of Economy, this memorandum is just a first step in developing a long-term strategic partnership between Electromecanica Ploiești, Romarm and Raytheon. In 2021 Electromecanica Ploiesti employed 381 people and had a turnover of RON 75.2 million (USD 16.5 million).



**Metrom S.A.**

<http://en.metrom.ro/>

METROM SA is the sole manufacturer of copper and brass sheets and strips and is also a military manufacturer of ammunition components (cups/cartridge case cups / bullet cups for small ammunition, discs for artillery ammunition). In 2021, Metrom employed 96 people and had a turnover of RON 7.1 million (USD 1.5 million).

**Mija Mechanical Plant (Uzina Mecanica Mija)**

[www.ummija.ro](http://www.ummija.ro)

Producer of anti-tank grenades, military grenades, products for maintaining public order. In 2021, the company employed 416 people and had a turnover of RON 45.1 million (USD 9.8 million).

**Moreni Mechanical Plant (Uzina Automecanica Moreni)**

[www.uamoreni.ro](http://www.uamoreni.ro)

Producer of amphibious armored vehicles 4x4, 6x6 and 8x8, amphibious armored vehicles SAUR 1 and SAUR 2, but also Zimbru carrier. In 2021, Moreni Mechanical Plant employed 302 people and had a turnover of RON 16.4 million (USD 3.6 million).

**Pirochim Victoria**

<http://romarm.ro/en/informatii-despre-companie/exhibitions/pirochim-victoria/>

The company produces military powders. Although listed on the Romarm's website, its activity has been closed for a number of years and the company also does not have its own website. In 2021, Pirochim officially employed 75 people but ever since 2011 its reported sales were close to zero.

**Plopeni Mechanical Plant (Uzina Mecanica Plopeni)**

[www.ump.ro](http://www.ump.ro)

Established in 1937. Product portfolio includes a diversified range of artillery ammunition (cal. 23 - 152 mm) for the National Defense System and for foreign beneficiaries. Apart from military products, the company produces parts used in the automotive, oil & gas and machine building industries. In 2021, the plant employed 296 people and had a turnover of RON 22.4 million (USD 4.9 million).

**Tohan S.A.**

[www.tohan.ro](http://www.tohan.ro)

Manufacture of military and civilian, including artillery ammunition, caliber 76 - 130 mm; ground-to-ground and air-ground missiles, 122 mm caliber and 82 mm range from 3 to 20.4 km (exclusive provider in Romania); warheads for missiles and artillery ammunition (main producer in Romania); marine ammunition (the only producer in Romania); pyrotechnical products: prime screws and tracers. In 2021, Tohan employed 398 people and had sales of RON 28.5 million (USD 6.2 million).

**Sadu Mechanical Plant (Uzina Mecanica Sadu)**

[www.umsadu.ro/acasa/](http://www.umsadu.ro/acasa/)

Producer of infantry ammunition. R&D projects, tools production and repair. In 2021, Sadu Mechanical Plant employed 743 people and had a turnover of RON 21.3 million (USD 4.6 million).

**UPS Dragomiresti (Special Products Plant Dragomiresti)**

[www.upsdragomiresti.ro/](http://www.upsdragomiresti.ro/)

Production of artillery ammunition, aviation bombs, explosives for civil use; artillery ammunition loading, assembling and packing operations; demilitarization. In 2021, the company employed 183 people and had a turnover of RON 11.3 million (USD 2.5 million).





### **Military Equipment and Technologies Research Agency (METRA)**

<https://www.acttm.ro/en/>

METRA is part of the Armaments Department within the MoD. It is a national organization similar to the US Defense Advanced Research Projects Agency (DARPA), the Command, Consultancy and Control Agency (NC3A) or NATO Research and Technologies Organization (RTO). METRA is part of the National Research & Development System, with accredited or certified structures for scientific research and technological development or for testing and evaluation, recognized at national or international level.

The following companies subordinated to the **Ministry of Economy and Trade** are major players in the defense industry:

#### **AVIOANESA Craiova**

<http://www.acv.ro/>

Advanced trainer aircraft manufacturer – IAR 99 SOIM; provider of maintenance, repair and overhaul of military aircraft; industrial products manufacturer. Capabilities cover a wide range of engineering, maintenance, testing and certification, design and manufacturing of tools and jigs, manufacturing of aircraft and product support. Its manufacturing covers almost all areas for classic metallic aero structures. For many years, the company had only maintenance and repair contracts. In 2020, a contract was signed for **Avioane Craiova to upgrade 10 IAR 99 Soim aircraft to be used for the training of future F-16 pilots**: the standard IAR-99s are to be equipped with advanced avionics and Embedded Virtual Avionics training systems, as well as Close Air Support and Air to Air capabilities. In 2021, Avioane Craiova employed 277 people and had a turnover of RON 12.1 million (USD 2.7 million)

#### **IAR SA**

[www.iar.ro/en/](http://www.iar.ro/en/)

IAR S.A. Brasov is the leading Romanian aerospace company with a history of aircraft production stretching back to 1952, the early days of aviation. IAR acts as a specialized MRO unit for Puma and Alouette III helicopters. IAR SA is an EASA Part 145 authorized maintenance center and also an authorized center for manufacture according EASA Part 21.

In 2017, IAR signed an agreement for exclusive cooperation with Airbus for the H215M multirole helicopter (IAR was going to become the prime contractor for the H215M for any future order by the Romanian Ministry of Defense to replace their ageing fleet, however no such orders have yet materialized).

**In 2021, Airbus Helicopters and IAR SA signed an Industrial Cooperation Agreement to personalize the H145M helicopter for attack missions for the Romanian Armed Forces.** The H145M would not be produced in Romania, but would be customized here to match the Army's options. **Also, the H215M would be produced by IAR SA, following the technology transfer from Airbus.** (H215M helicopters will be produced by IAR SA not only for Romania, but also for the future international orders that Airbus will receive). Maintenance of both H145M and H215M would be done in Romania.

**In 2021, Israel Aerospace Industries (IAI) signed a cooperation agreement with the IAR SA company to produce unmanned aircraft (UAV) such as Tactical Heron:** the UAV systems will be manufactured in Brasov and IAI will establish an academy in Romania to train operators and technicians for UAV systems. In 2021, IAR SA employed 367 people and had a turnover of RON 329.5 million (USD 53 million)

#### **IOR SA**

[www.ior.ro](http://www.ior.ro)

Producer of sighting and aiming apparatus for infantry, artillery, and armored vehicles. Also produces medical equipment, sport optics, eyewear lenses etc. In 2021, IOR SA employed 258 people and had a turnover of RON 17.5 million (USD 3.8 million)



**ROMAERO SA**

<https://www.romaero.com/?lang=en>

Romaero is an aerospace company that integrates two major activities: the aero structure manufacturing and the maintenance and repair of civil and military transport aircraft. It is the largest company in the Romanian Aerospace Industry with 90-year tradition. As an approved organization for Part-21 (G) airframe manufacturing, ROMAERO has capabilities for tool design, production engineering, CNC machining, stretch forming, chemical milling, painting, laboratory testing and acts as a subcontractor to leading aircraft producers such as: BOEING, BOMBARDIER, SPIRIT AEROSYSTEMS, AERO VODOCHODY AEROSPACE, SABCA, SAAB and AEROLEAN. Its authorized workforce offers high quality services on the following types of aircraft: Airbus A320, Boeing B737, 727, 707, MD 80, BAC1-11, Antonov AN-26, BN-2 Islander, ATP and C130 Hercules.

**In September 2020, a Memorandum of Understanding was signed between ROMAERO and Sikorsky,** part of the Lockheed Martin group, in view of establishing a Regional Center for Equipment and Maintenance for Black Hawk Helicopters for Central Europe in Romania.

**In October 2020, Romaero signed a Memorandum of Understanding with the U.S. group Raytheon, for the two companies to cooperate in producing the Patriot missiles systems** to be delivered to Romania. Thus, Romaero has become the second local contractor of the Patriot systems after Aerostar Bacau. The MoU also opens prospects for Romaero to export its production for Patriot systems worldwide. **Romaero SA will also perform the modernization of the avionics of 5 C-27J Spartan aircrafts during 2023-2027.**

In 2021, Romaero employed 777 people and had a turnover of RON 52 million (USD 11.5 million)

---

Largest private Romanian companies active in the defense industry

---

**AEROFINA SA**

[www.aerofina.ro](http://www.aerofina.ro)

Research, production and testing of military and industrial equipment. Manufacture of products for IAR-99 training plane / MiG 21 LanceR fighter / IAR 330 (PUMA) fight helicopters / IAR 330 PUMA-SOCAT fight helicopter. Romanian clients include: MoD (Air Forces, Ground Forces, Naval Forces), Avioane Craiova SA, IAR SA, etc. Foreign clients include: Meggitt Defense Systems Ltd, Odesa Viarem, Elbit Systems Ltd, etc. In 2021, Aerofina employed 95 people and had a turnover of RON 26.6 million (USD 5.8 million).

**AEROSTAR SA Bacau**

[www.aerostar.ro](http://www.aerostar.ro)

A regional leader in aviation manufacture and civil aircraft maintenance. Integration, production, upgrade and maintenance for aviation, naval and ground defense systems. MRO and upgrades of military aircraft: L39 jet trainer, MiG 21 jet fighters, aero engines R-13-300, R-25-300, Sapphire 5 turbostarter.

**The company is approved as the Maintenance Centre for the F-16 aircraft in the Romanian inventory, providing maintenance of the F-16 aircraft of the Romanian Air Force:**

- o Maintenance, Upgrade and Logistic Support for F-16 aircraft & F100 engines
- o Phase Inspections & Technical Assistance, periodical and ad-hoc activities
- o Repairs of mechanical and electrical systems, fuselage, wings, and engines
- o Implementation of future Upgrade programs for Romanian Air Forces F-16 aircraft

**Aerostar has also started collaboration with Raytheon International Defense System in the area of equipment and components of the multi-level air defense integrated system.** Starting 2019, Aerostar is producing parts for the PATRIOT systems.

With 1,531 employees in 2021, the company reached sales of RON 376.4 million (USD 83 million)

**AEROTEH SA Bucharest**

[www.aeroteh-sa.ro](http://www.aeroteh-sa.ro)

Design, development, production / repair, assembly, service and marketing of hydraulic and pneumatic equipment used in control and navigation systems of aircraft and aviation engines; complex equipment in the natural gas distribution, transport, extraction, measuring and control systems; stands for testing and checking equipment in the field of aviation and natural gas distribution. In 2021, Aeroteh employed 115 people and had a turnover of RON 97.4 million (USD 21.2 million).

**CONDOR SA Bucharest**

[www.condor-sa.ro/index\\_en.html](http://www.condor-sa.ro/index_en.html)

Manufacturer of parachutes and military flight equipment. With 70 years of experience in the domain of aviation, the company produces parachutes and a wide range of special equipment and garments both for the military and civil sectors. In 2021, Condor SA employed 213 people and had a turnover of RON 24.6 million (USD 5.4 million).

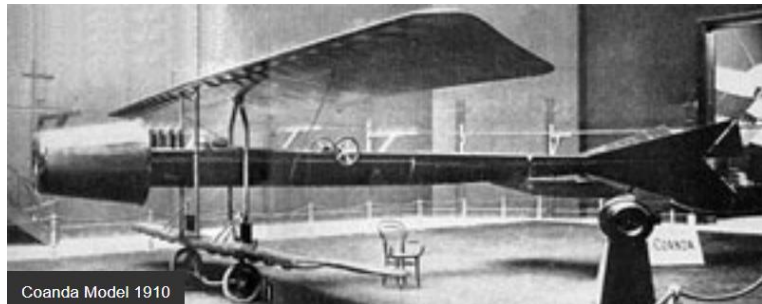
**TURBOMECNICA SA Bucharest**

<http://turbomecanica.ro/en/>

Turbomecanica is involved in the manufacture of jet engine components and assemblies. Manufacturing of aeronautical components and high-tech parts, repair and overhaul, special processes. Major clients in defense aerospace include the Romanian MoD (Air Force Command, Naval Force Command), IAR SA, Aeroteh SA, Rolls Royce Plc (UK), General Electric Aviation (USA). In 2021, Turbomecanica employed 501 people and had a turnover of RON 131.3 million (USD 29 million).

Romanian aerospace industry

Romania is proud of its contribution to aviation history by giving the world pioneers of aerodynamics, including Traian Vuia (inventor of the first self-propelling heavier-than-air aircraft in 1906), Aurel Vlaicu (avant-garde airplane constructor who also built the first Romanian military airplane) and Henri Coanda (designer and builder of experimental aircraft, discoverer of the Coanda effect in fluid dynamics and thus inventor of the first jet-plane).



There are currently 31 players in the Romanian aerospace industry and auxiliary sectors, including manufacturing, R&D and other related activities. The sector has a large pool of products and parts that are used and bought by many large global companies. The main products manufactured in Romania are aircrafts, helicopters, gliders and motor gliders, aircraft engines, helicopter power units, dynamic assemblies for helicopters, actuators and servo valves, landing gears, brakes, hydropneumatic accessories and equipment, electrical/electronic equipment, components and subassemblies.

Major companies in manufacturing and MRO are **AEROSTAR SA BACAU**, **ROMAERO SA BANEASA**, **AVIOANESA CRAIOVA** and **IAR SA BRASOV**.



## DEFENSE PRODUCTS: IMPORTS AND EXPORTS

Imports to Romania come mainly from the EU and the United States. Romania is also looking to modernize its own defense industry through international partnerships, and U.S. firms may contribute to this goal.

Official statistics of defense products imported to Romania are declared classified information by the MoD. Below are presented the data available on the UN Register of Conventional Arms website [www.unroca.org](http://www.unroca.org):

### Romania's 2021 imports:

Category	Number of items	Description	Imported from
Large caliber artillery systems	18	HIMARS systems	United States
Combat aircraft	1	F-16A	Portugal
Missiles and missile launchers	15	14 pcs. AIM-120; 1 pc. AIM-9	United States
Revolvers and self-loading pistols	8490	Various types and calibers	Czech Republic – 5941 pcs. Austria - 2419 pcs. Germany – 190 pcs.
Rifles and carbines	4930	Various types and calibers	Germany – 1787 pcs. Italy – 1338 pcs. Belgium – 475 pcs. Czech Republic – 373 pcs. Hungary – 339 pcs. Finland - 274 pcs.
Sub-machine guns	40		Germany
Assault rifles	1000		Germany
Light machine guns	32	7.62mm	Israel

Source: [www.unroca.org](http://www.unroca.org)

In 2021, Romania exported ammunition and armaments in value of USD 209.3 million (52% higher than in 2020). The main customers were **Israel** (contracts in value of USD 60.3 million), **Norway** (USD 43.75 million), the **U.S.** (USD 20.1 million), **Bulgaria** (USD 11.8 million).

The main types of exports include:

- ammunition and components
- IFF land systems parts
- imaging or counter-action equipment
- body armor
- products for guidance and navigation equipment for combat aircraft
- pistols, assault rifles, machine guns
- spare parts for cal. 23 mm
- mortar system components
- anti-tank shots for grenade launcher cal. 73 mm
- anti-tank guided missiles, cal. 125 mm
- military explosive



- data transmission equipment
- software for command and control systems
- optoelectronic observation, detection, recognition and identification systems
- cables for optoelectronic systems
- costal ship
- components for artillery/ships/aircraft and land vehicles

Provided below is a short profile of a key player in military product import and export in Romania:

**NATIONAL COMPANY ROMTEHNICA SA**

[www.romtehnica.com.ro/site/en/](http://www.romtehnica.com.ro/site/en/)

ROMTEHNICA is an import-export company of the MoD, one of the leading trade companies in the field, with more than 35 years of experience on the international defense market. Its main activities are the negotiation, conclusion and carrying out of import contracts for products, equipment, gear, spare parts and military technologies, technical assistance, as well as other foreign and domestic trade operations. Romtehnica negotiates and signs contracts on behalf of the Romanian Ministry of National Defense and other entities related to technology transfer, logistic support, technical assistance and personnel training. It also acts as an intermediary agent, distributor, commissioner, representative, associate in relations with Romanian and foreign legal and natural persons. Romtehnica is also the exclusive exporter for the Romanian MoD' surplus equipment and the most important trader of goods and services produced by the Romanian defense industry. In 2021, Romtehnica employed 80 people and had a turnover of RON 16.9 million (USD 3.7 million)

**OPPORTUNITIES AND THREATS**

---

Romania's defense industry is currently dependent on imports of gunpowder and explosives (imported from e.g., Bulgaria and even Russian powders exported via Serbia, a non-NATO country) needed for the production of ammunition. In July 2022, the German company Rheinmetall broken the memorandum with ROMARM for the re-construction of Fagaras Powders Plant. Following this failure, the head of ROMARM Mr. Gabriel Țuțu mentioned negotiations with the U.S. construction and architecture company Epstein.

In February 2023, a Memorandum of Understanding (MoU) on industrial cooperation was signed between the National Company Romarm S.A. and the South Korean Hanhwa Aerospace for the production of land military systems and powder and explosives in Romania. The MoU between the two companies opens perspectives for Romarm to export products and services globally, with the possibility of becoming one of the European suppliers of the Hanwha company.

In the context of the war in Ukraine, the European Commission wants to relaunch the continental heavy munitions industry and will present an action plan to Member states in this regard. This will be a program lasting seven years, in which the European defense industry should ensure not only the supply of ammunition to Ukraine, but also the replenishment of the stocks of European countries This will be the perfect opportunity for the Romanian arms industry to relaunch, opportunity which experts warn should not be missed.



## 1.6 MODERNIZATION AND ARMAMENT STRATEGY

In a time where aggressions of all kind (between states, against civilians and even in the cyber space etc.) occur more often and with higher intensity, and especially due to Romania's proximity to Ukraine's battleground, the country is seeking to strengthen its protection against various types of threats.

The government has put forward a strategy for modernizing and upgrading its military equipment and massive purchases are planned for the near future. In particular, the Romanian Armed Forces make the transition from mostly Soviet-origin weapons, or locally manufactured but based on Soviet weapon systems, to modern weapons of Western origin. Thus, the MiG-21 LanceR fighter jets will gradually be replaced by the F-16 Fighting Falcon multirole aircrafts, while the old Soviet air defense systems are to be replaced by modern surface-to-air missile (SAM) systems, including MIM-104 Patriot SAM system.

Also in the non-military sector, for soft targets protection and especially in the field of surveillance and security, modern equipment and newest technologies are being sought after.

Mostly EU and U.S. companies compete for opportunities in the Romanian defense market. Given the strategic partnership between Romania and the United States and the fact that Romania has to rely on NATO support in case of a military attack (especially from Russia), there are situations where U.S. defense/security products are preferred.

Starting with 2023, the Romanian defense budget has increased from 2% to 2.5% of GDP (with a commitment to maintain this percentage of the GDP for the next decade), 30%+ of the budget being allocated for purchases of modern equipment for the Armed Forces.

Approximately USD 11.27 million has been planned for investment for the period 2017-2026, as stated in the Army Endowment Plan dated 2017. Purchases stated in this Endowment Plan are outlined below:

1. **Multifunctional corvette – est. USD 1.86 million** - purchase of 4 new corvettes with related equipment, ship-to-ship missiles, ship-to-air missiles, ammunition, encryptors. **The tender for purchasing 4 new multifunctional corvettes to replace the old ones by 2026 (the first corvette to be delivered by 2022)** was won by the **Naval Group (France) – Constanta Shipyard (Romania)** consortium in December 2018. However, due to the appeal filed in court by Damen (Dutch owner of 2 big shipyards in Romania) - who also participated in the tender – the procedure was put on hold and has not been resumed since. The Romanian Minister of Defense has recently stated that this situation will definitely be resolved this year.
2. **Mobile missile launcher systems – estimated budget of EUR 0.2 billion (USD 0.23 billion)** - Complex battle platform capable of discovering, identifying and destroying surface naval targets through anti-ship missiles - a formation of 3 installations.
3. **Modernization of MLI-84M - estimated EUR 0.138 billion (USD 0.160 billion)** - 48 fighting vehicles
4. **Armored vehicles for troops - 8X8 and 4X4:** initial estimation of total need was 657 vehicles.
  - A contract (in the value of EUR 895 million = USD 1 billion) has been signed with General Dynamics European Land Systems - Mowag GmbH (subsidiary of the General Dynamics Corporation) for the purchase of 227 Piranha V (non-amphibious) vehicles, the first 30 of which to be produced in Switzerland and other 197 are to be assembled at **Bucharest Mechanical Factory (Uzina Mecanica Bucuresti, UMB)** - a branch of the state-owned company Romarm. Following this contract, 94 vehicles have already been delivered to the Romanian Ground





Forces and another 133 are still do be delivered. **Additionally, it has been decided to purchase another 150 units in 2023.**

5. **C4I systems with ISTAR integration capabilities – estimated budget of EUR 0.180 billion (USD 0.2 billion)** - Integrated Communications Systems and Battalion Informatics - B / SICIB, PCBg Command Post (Brigade-type) and PCDiv Command Post (Division –type) / Stage 1: Framework Agreement for 7XPCBg , 14xB / SICIB and a subsequent contract for 3xPCBg and 6xB / SICIB. Note: on February 1, 2018 a contract was signed between Romarm and the US company Circinus Defense for the implementation of C4ISR system meant to strengthen Romania's military capabilities and enhance interoperability with NATO and US allies. (The contract was signed under confidentiality clause).
6. **PATRIOT high-range surface-to-air missile (HSAM) systems – budget EUR 4 billion (USD 4.62 billion).** Purchase of 7 Patriot ground-to-air missile systems (4 for Air Forces, 3 for Ground Forces) plus related equipment, totaling about USD 4.62 billion including VAT. Four PATRIOT systems have already been delivered and another 3 are to be delivered in the next period. Raytheon (U.S.) and Romanian “**Aerostar Bacau**” **signed a collaboration in the line of equipment and components of the multi-level air defense integrated system.** Since 2019, Aerostar has been producing parts for the PATRIOT systems. (Aerostar is a Romanian aerospace and defense company that specializes in the production, assembly, integration and integrated logistic support for a wide range of defense and aviation systems).
7. **Integrated Weapon Systems - short-range and very short-range air defense SHORAD / VSHORAD:** EUR budget 2.1 billion (USD 2.44 billion). (Stage 1: buying only SHORAD components for EUR 1.37 billion (USD 1.59 billion). Stage 2 - purchase of 21 Integrated Weapons Systems SHORAD-VSHORAD).
8. **Multiple Rocket Launcher – budget of EUR 0.69 billion (USD 0.8 billion)** - 3 systems of 18 launching facilities (54 launching facilities)

Romania has also signed an agreement with the U.S. Government for the purchase of High Mobility Artillery Rocket System (HIMARS) and Guided Multiple Launch Rocket Systems (GMLRS) – Romania thus became the first European HIMARS customer. Romania has purchased 3 HIMARS systems (one of which has already been delivered and the other two are still to come).

Further recent or planned purchases include among other:

- In November 2022, The Romanian Government approved the procedures for the purchase of 13 "Integrated communication and information systems for Battalion" and 4 "Command posts – brigade type" whose production and maintenance should be made in Romania. Estimated costs: RON 847.6 million (USD 194.4 million) without VAT.
- Contract signed in 2022 for the purchase of second-hand F-16 aircraft from Norway (32 aircraft in M6.5.2 configuration, spare engines and logistic support). The first aircraft should be delivered by the end of 2023 and the delivery of the whole order should be completed in 2024.
- In 2022, the MoD signed a letter of intent to buy French-made Scorpene class submarines and helicopters.
- Two Romanian frigates (ex UK Type 22) were initially planned to be modernized by the end of 2019; in the meantime, the public tender has come to a standstill since 2018.





- In 2022, a contract was signed with Elbit systems for the purchase of 7 Watchkeeper X UAV systems, class II classic drones which will have an upgraded and modified radar, and state-of-the-art sensors.
- In March 2023, the U.S. State Department has approved a possible sale of 95 Heavy Gun Carriers Joint Light Tactical Vehicles (JLTVs) and related equipment to Romania. Romania had previously requested 35 JLTVs, bringing the full potential sale up to 129 JLTVs, valued at up to USD 104 million. Also included are VRC-104 radio kits; VRC-114 radio kits; baseline integration kits; basic issue items; Defense Advanced GPS Receivers (DAGRs); DAGR integration kits; network switch ports; exportable power kits; silent watch energy storages; power expansion kits; RF7800i intercom kits; combat bumper kits; winch kits; flat tow kits; run flat kits; spare tire kits; commander supply display units; improved turret drive systems; M1114 turret ring hatches; 2-year contractor spare parts package; technical assistance; total package fielding; technical publications/manuals; and other related elements of logistics and program support.
- Approval of the purchase of a battalion of Abrams tanks (54 pieces) is currently undergoing in the Romanian Parliament
- Contract signed with Raytheon (in value of USD 208 million) for an unspecified number of mobile coastal anti-ship missile batteries.
- Tender launched in 2022 for the purchase of 115-231 MANPADS (RON 1.6 billion - 3.3 billion i.e., USD 0.35 billion – 0.73 billion)
- Tender launched in 2022 for the purchase of H/V/UHF-LINX and V/UHF-ARGUS electronic warfare equipment
- Avionics system upgrade for the 7 C-27J Spartan used by the Romanian Forces: in the first phase (which took place in 2022), the avionics of 2 C-27J Spartan aircraft were upgraded, together with the training of Romanian personnel (application of service bulletins, complex periodic checks and inspections, etc.) in the Leonardo Aircraft Division facilities. The second phase will include avionics modernization of 5 C-27J Spartan aircraft at the Romaero facilities in the period 2023-2027. Estimated costs: EUR 88 million.
- In January 2023, the U.S. company Raytheon signed a USD 208 million contract to supply Romania with "Naval Strike Missile Coastal Defense System" missile systems. Missiles should be ready by 2028. The contract includes two coastal defense systems, which in addition to the missiles themselves also include 4 mobile launch pads and 2 command centers.
- In 2022, The Romanian army initiated the procedures for purchasing two H215M helicopters with surface combat capabilities. The value of the procurement is estimated at EUR150 million (excluding VAT) and includes, in addition to the two helicopters themselves, specific equipment for anti-ship surface combat capability, integrated logistical support for the operation of helicopters and weapons systems, aircrew training, and provision of ammunition stocks for combat systems. The procedure was approved by the Romanian Parliament in October 2022.
- In 2022, it was decided to purchase 3 Bayraktar TB2 systems (18 UAVs). The contract's value is of approx. USD 300 million. These drones will be operated by the Romanian Ground Forces.



- The Romanian Navy will purchase 31 portable anti-drone systems over the next two years. The estimated value of the contract is RON 5.5 million (USD 1.2 million)
- Tender launched in October 2022 for the procurement of ammunition systems with loitering surveillance capability: 3 complete systems with an estimated value of EUR 1.7 million without VAT.
- At the end of 2022, the Romanian Government approved the Phase I of the "Light Tactical Armored Vehicles" armament program which aims to award a multi-year contract for the supply of 1,059 light-type armored tactical vehicles in 9 configurations - basic version and eight types of by-products. Estimated cost is RON 4.58 billion (USD 1 billion) without VAT and includes the equipment that will be made available as "customer material" worth approximately RON 228 million (USD 49.6 million) without VAT. The main competitors may include U.S. Oshkosh Defense with the Joint Light Tactical Vehicle (JLTV), the French Arquus with Sherpa Light, and the Turks from Nurol Makina.
- 2019 contract worth EUR 216 million for 942 Iveco vehicles, the first follow-on contract in a larger agreement to deliver more than 2,900 military trucks and platforms. Iveco truck assembly plant for the Romanian Army was inaugurated in Petresti, Dambovita in 2021. The plant has a capacity of 440 vehicles per year, has five production lines and a surface area of 9,000 sqm.. In 2022, 514 trucks were delivered from the plant in Petresti. By the end of 2026, all deliveries under the general contract are to be completed.
- Tender launched in August 2022 for purchasing 2 sets of "Electronic Warfare System in H/V/UHF-LINX communications" in estimated value of RON 517.6 million (USD 115 million) without VAT.
- Tender launched in August 2022 for purchasing maximum 3 sets of "Electronic Warfare System in V/UHF-ARGUS communications" for an estimated price of RON 444.7 million (USD 98.8 million) excluding VAT.
- A restricted tender launched in August 2022 for purchasing maximum 5 sets of "Scorpion portable electronic warfare system" at a cost of RON 216.5 million (USD 48 million).
- Tender launched in August 2022 for purchasing up to 160 pcs portable UAS/S combat systems – UAS in value of RON 24.8+ million (USD 5.5 million) without VAT.
- Plans for 61 helicopters (attack and multirole) to be purchased after 2030
- The Romanian Supreme Council on National Defense (CSAT) approved on April 11th, 2023 a plan to acquire F-35 Lightning II fighter jets for the country's Air Force. The number of the fighter jets to be purchased and the planned acquisition's value were not disclosed.

**Moreover, in March 2023 the Romanian MoD asked the Parliament to approve a procurement plan valued at approx. USD 11 billion as follows:**

- **41 SHORAD / VSHORAD systems valued USD 4.6 billion**, as follows:
  - 16 SHORAD / VSHORAD integrated systems for the Air Forces
  - 9 SHORAD and 16 VSHORAD systems for the Ground Forces

Stage 1 of the procurement plan for these systems will be initiated in 2023 and will last 8 years, to include 6 systems for the Air Force and 6 systems for the Ground Force at a total value of USD 2.3 billion



- **298 Infantry fighting vehicles for the Ground Forces, in estimated value of approx. USD 3.3 billion.** Stage 1 will start in 2023 and will last for 9 years (consisting the purchase of 246 valued approx. USD 2.73 billion).
- **5 systems of self-propelled howitzers (caliber 155 mm) for 5 battalions of the Ground Forces – estimated value: USD 2.2 billion**
- **186 air-to-air missiles AIM-120 AMRAAM (to be used on F-16 aircraft) in value of USD 372 million (to be purchased from the USA by G2G agreement)**
- **299 short-range air-to-air missiles AIM-9X SIDEWINDER (to be used on F-16 aircraft) in value of USD 239 million (to be purchased from the U.S. by G2G agreement)**

**In April 2023, the Romanian MoD asked the Parliament to approve purchasing programs valued USD 110 million for strengthening the Navy Forces:**

- Purchase of ships specializing in sea mines neutralization
- Purchase of submarines for deterring or even destroying "enemy naval forces, independently or in cooperation with other forces"
- Modernization of naval missile ships (Tarantul class):
  - replacement of radar and communication systems,
  - replacement of the massive hangars for Russian anti-ship missiles with Western-made hangars that are less voluminous,
  - installing equipment of the new launch plant and some high-performance anti-aircraft systems,
  - overhauls to the propulsion side and possibly supplementing the navigational equipment



## 2 HOMELAND SECURITY

### 2.1 INTERNAL SECURITY SYSTEM

#### 2.1.1 MINISTRY OF INTERIOR

The Ministry of Interior (Mol) - through institutions it coordinates - carries out activities meant to prevent and combat terrorism, organized crime, trafficking and illicit drug use, human trafficking, illegal migration, cybercrime, and other criminal phenomena and antisocial deeds.

Main institutions subordinated to and coordinated by the Mol include:

- Romanian Police
- Romanian Gendarmerie (in charge of public safety and security; riot prevention; security of targets / transportation, etc.)
- Romanian Border Police
- General Inspectorate for Emergency Situations (prevention and management of emergency situations; first responder in case of emergencies: fire, flood, earthquake, CBRN accidents, etc.)
- Immigration Inspectorate
- Mol Aviation Inspectorate (aircraft in possession: Eurocopter EC 135, IAR 316B, MI-8, MI-17, PIPER PA 42-720 CHEYENNE III)
- General Directorate for Domestic Protection
- General Directorate for Anti-Corruption Fight
- National Anti-Drug Agency
- National Agency for Fighting Human Trafficking

**Governing body:** Romanian Government  
**Minister:** Mr. Lucian Nicolae Bode  
**State Secretary:** Police Quaestor General Bogdan Despescu

**Website:** [www.mai.gov.ro](http://www.mai.gov.ro)  
**Headquarters address:** Piața Revoluției nr.1 A, sector 1, București, Romania

#### 2.1.2 ROMANIAN INTELLIGENCE SERVICE (SRI)

SRI's responsibility is to prevent and counter espionage, terrorist and cross-border organized crime activities, which by their nature and extent affect national security. The SRI is also one of the bodies involved in cyber security and critical infrastructure protection.

Starting 2022, the Romanian Intelligence Service (SRI) and the Romania's Foreign Intelligence Service (SIE) will also be part of a commission for the evaluation and approval of FDIs from non-EU countries if the value of the investment exceeds USD 2.1 million.

The SRI's budget for 2023 is RON 3.92 billion (USD 0.85 billion). The Romanian Intelligence Service will purchase 6 medium-lift helicopters from Airbus Helicopters Romania. The framework agreement was signed in January 2023 for approx. USD 174.5 million.

**Governing body:** Supreme Council of National Defense (CSAT)  
**Director** Mr. Eduard Raul Hellwig  
**Website:** [www.sri.ro](http://www.sri.ro)  
**Headquarters address:** Bd. Libertatii 14, 030167 Bucharest, Romania

---

### 2.1.3 POLICE FORCES

#### Romanian Police

---

The Romanian Police is a law enforcing agency with competences for the entire Romanian territory. It has 42 inspectorates, 33 penitentiaries, 6 hospital-penitentiaries, 3 detention centers, and 2 training centers.

Directorates of the Romanian Police:

- Public Order Directorate,
- Criminal Investigations Directorate,
- Organized Crime Countering,
- Economic Crime Investigation,
- Road & Traffic Directorate,
- Arms, Explosives and Dangerous Substances Directorate
- Traffic Police
- Police International Cooperation Center
- Forensics Institute
- SWAT Service

In the period 2019-2025, the General Inspectorate of the Romanian Police is running the "Improving Resilience and Response in Emergency Situations" project, financed by the World Bank and the Government of Romania, whose goals are to increase the resilience of the Romanian Police's critical response facilities in emergency situations and disasters and to strengthen institutional capacities for emergency preparedness and response.

**Governing body:** Ministry of Interior  
**General Inspector (state secretary)** Mr. Ioan Buda  
**Website:** [www.politiaromana.ro](http://www.politiaromana.ro)  
**Headquarters address:** Police General Inspectorate  
6, Mihai Voda Str., Bucharest sector 5, Romania

#### Municipal police

---

Municipal police units are administered by cities and municipalities. Bucharest is by far the largest city in Romania, covering 228 km<sup>2</sup> and hosting a population of 3.5 million people. Bucharest City Police supervise and protect the safety of citizens and property, ensure public order, road safety, discipline related to street display, construction and demolition, environmental protection, commercial activity, population record, etc.

**Governing body:** Bucharest City Council  
**Director:** Mr. Stefan Vasii  
**Website:** [www.plmb.ro](http://www.plmb.ro)  
**Headquarters address:** Bucharest City Police Directorate  
18 Libertatii str, bloc 104, Bucharest sector 5, Romania





## Romanian Border Police

Romania (a non-Schengen area country – not part of the area with free movement of persons without border controls within the EU) is a guardian of one of the EU’s main external borders (with Ukraine, Moldova, Serbia and the Black Sea), fighting drug smuggling, human trafficking, and counterfeiting. The Romanian Border Police is part of the Ministry of Interior and is responsible for approx. 3,150 km of borders: 2,050 kilometers of external border and 1,090 kilometers of internal border of the European Union (see the map below):



Source: Nations Online



## 2.2 DOMESTIC, REGIONAL AND INTERNATIONAL THREATS

In recent years, new challenges and threats have emerged in the Black-Sea region such as the annexation of Crimea, the destabilization of Ukraine, the migration crisis and lately the tensions between Russia and the Republic of Moldova. The Republic of Moldova was a region of Romania before its annexation by the Soviet Union at the end of World War II. Since the collapse of the USSR and the establishment of the Republic of Moldova as an independent state, Romania has been supporting Moldova in multiple directions (economic support, academic support, political support for the EU accession, etc.) while Russia has kept trying to destabilize ties between the two countries.

While there is no indication of an immediate direct military threat to Romania, the aggression taking place near the country's borders increases the risk of conventional military aggression against Romania and could have a major impact on the country, which is why the country needs to rapidly improve its defense capabilities.

Risk factors for regional security also come from the creation and deployment of military structures in the proximity of Romania by some non-NATO countries (especially Belarus supporting Russia), as well as from their reorganization, modernization and procurement of modern weapon systems and equipment, development of high-mobility special forces capabilities, military infrastructure and of intensified large-scale unannounced military exercises.

At the same time, existence and perpetuation of inter-ethnic tensions and regional or local unrest in the Romania's proximity and in its area of interest can also lead to conflicts. These involve, for example, Hungary constantly trying to exacerbate minor tensions between Romanian citizens and the Hungarian minority; tensions caused among Romanians by the aid Romania offers to Ukraine (the population is now divided into supporters and strong objectors) as the Romanian minority living in Ukraine is not allowed the same rights that Romania offers to the Ukrainian minority; new tensions between Serbia and Kosovo; etc.

At present, Romania does not face direct, imminent and explicit terrorist threat. However, the geographic proximity to areas in which terrorism is rampant and Romania's participation in missions to stabilize/rebuild areas of crisis and conflicts are factors that may lead to hostile actions against the country.

National contingents who take part in missions overseas will continue to face conventional and unconventional risks and threats generated by the actions of extremist and terrorist forces and organizations.

In close connection with terrorism, trans-border crime generates a risk of arms and ammunition trafficking. Although the arms trafficking market has decreased considerably over the last decade, Romania is still a transit country for illegal weapons from Eastern Europe that are destined for other European countries. The trafficking of firearms to Romania from Western and Southern European countries also still takes place. Bulgaria is the main source country for Romania's illicit firearms. Albanian-speaking organized crime groups traffic weapons in Romania, along with Balkan, Russian, Georgian and Turkish criminal groups. Many firearms that end up on Romania's illegal gun market are illegally produced and/or trafficked. Guns are also diverted from the legal domestic market. In organized crime group transactions, firearms are exchanged for other more high-priced goods and products.

Development of capability to use chemical, biological, radiological, and nuclear (CBRN) weapons as an instrument of dissuasion and promotion of political or ideological interests remains another important preoccupation of the Romanian state. The combination of weapons of mass destruction and vectors of classical ammunition is estimated as one of the most significant risks to Euro-Atlantic security.

Cyber-attacks are at an all-time high especially after Russian attackers have intensified their focus on Romania as well. The increase in the frequency and complexity of such attacks can generate serious damage to information systems with a direct impact on critical infrastructure, to include security and defense.





In order to amplify the results, cyber-attacks are often also combined with specific actions, especially with subversive campaigns, acts of espionage or sabotage.

The impact of fake news on Romanian society is another threat that authorities are trying to bring to the population's attention, teaching citizens to distinguish trustworthy information from fake news.

The evolution of organized crime in Romania in recent years is closely linked to the development of cybercrime and increased use of information technology and communications in committing crimes.

According to the 2021 Organized Crime Index report, Romania is a major country of origin and destination for human trafficking and is among the top five countries in the EU in terms of human trafficking victims. Victims from Romania are trafficked mainly to Italy, France, Germany, Spain, and the UK, while Pakistan and the Philippines are the major source countries for those coming into Romania. The victims of trafficking live in vulnerable economic and social conditions and are forced to work in the sex industry, agriculture, construction, manufacturing, and hotel industries. They are also exploited for domestic service, forced begging and theft. A common modus operandi used to trap victims (over half of whom are children) involves the so-called 'lover boy' method, whereby traffickers establish false romantic relationships with their victims, promising them a better life in Western Europe.

In 2023, Romania remains a primary source country for sex and labor trafficking victims in Europe. The vast majority of identified victims (72%) in 2020 are sex trafficking victims. Children represent nearly 50% of identified trafficking victims in Romania, and Government officials and NGOs report increased recruitment of children via the internet and social media due to the pandemic.

Initially a drug transit country, Romania has lately become a country of destination for drug consumption, and CIA reports also mention Romania to be a source of cannabis. Romania forms part of the north Balkan route used for heroin produced in Afghanistan. Heroin entering Romania is either for local consumption or destined for Central and Western Europe. Cannabis is the most commonly used drug in Romania. In 2021, most users were young adults aged 15-34. The drug is imported into Romania from Spain, Greece, and Albania, but the majority of cannabis seized in the country is domestically produced.

Cocaine is the second most-seized drug in Romania. Large quantities enter the country through the Constanta port, from where it follows the Balkan route towards Western Europe, utilizing the same infrastructure that has been developed for the trafficking of large quantities of heroin and synthetic drugs. Romanians living in South America and South Americans living in Romania create key links for organized crime groups trafficking cocaine. MDMA/Ecstasy seized in Romania is trafficked mainly from Germany and the Netherlands while amphetamine is usually trafficked from Germany, Belgium, and Bulgaria. The new psychoactive substances come predominantly from Asia and usually arrive via postal services.

The increasing number of drug users, especially among young students (starting approx. at the age of 13 years as mentioned in 2023 reports) have raised concerns among Romanian authorities trying to fight this crime.

Illegal logging takes place on a large scale in Romania. The illegal logging industry in Romania is one of the largest in the EU. There is evidence linking illicit logging activities to organized crime gangs. Media reports suggest that the forestry sector is plagued by corruption, with some alleging that the police and forest rangers work hand in hand with illegal loggers. Romania is an important destination, transit and source country for wildlife trafficking. Traffickers allegedly use Romania's border with Ukraine to smuggle illicit wildlife into the EU. Romania is one of the few countries in Europe with a viable wildlife sturgeon population and thus has one of the most highly valued sturgeon caviar black markets in the world.

Romania has signed several international agreements related to organized crime. It participates in investigations stemming from EU judicial cooperation and has extradition treaties with several other countries. Romania's domestic legal framework includes legislation on drug trafficking, human trafficking, the smuggling of migrants, arms trafficking, and money laundering. Romania has also amended its forest protection laws.

## 2.3 CRITICAL INFRASTRUCTURE

### Airports and ports

Romanian airports are subordinated to the Ministry of Transportation. There are 14 airports for international flights in Romania. The 15<sup>th</sup> airport for international flights (Brasov airport) will start functioning this year (first flights being scheduled for June 2023)

Local airports are preparing for an increase in traffic in the coming years and are investing in upgrading and expanding local air infrastructure. Over USD 650 million will be invested into airports for various works to modernize and expand the terminals, covered by European funds and the state budget. These figures also include the investment in Brasov airport (investment of approx. USD 142 million).

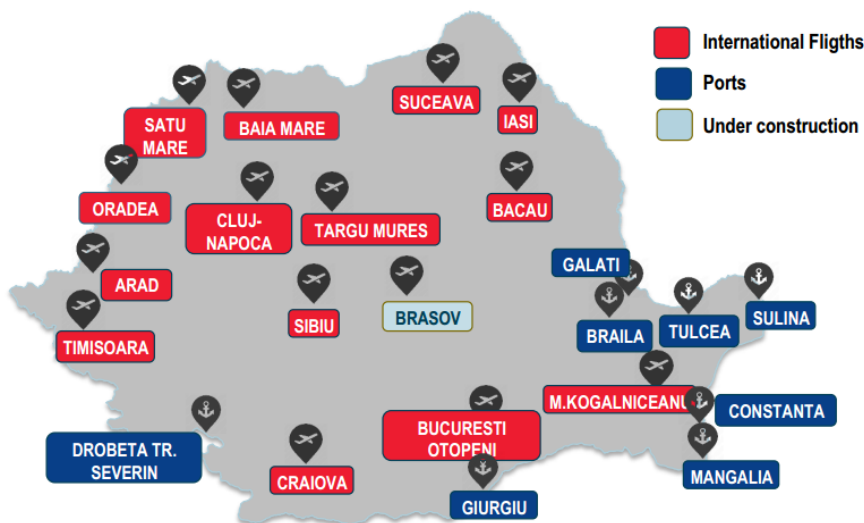


Out of all the airports, [Henri Coanda \(Bucharest-Otopeni\) airport](#) is by far the largest, accounting for 15+ million passengers in 2019 and 12+million passengers in 2022. In 2022, the Bucharest National Airports Company (CNAB) has signed a EUR 21 million contract with the French Alstef Group for modernization works at the Henri Coanda airport. The contract includes the overhaul of the international terminal baggage handling and screening

system (56 new check-in conveyors, 12 self-service bag drops and a new outbound sorting system with five new Standard 3 screening machines), two new baggage carousels and a transfer connection to the domestic terminal. The project will be completed within a span of two years.

Next after Otopeni airport come [Cluj-Napoca airport](#) with 1.9 million passengers and [Timisoara airport](#) with 1.16 million passengers handled annually.

Contracts for the modernization of Cluj-Napoca, Timisoara, Iasi, Satu-Mare and Suceava airports are currently underway.



Romania has several ports (on the Black Sea and the Danube), the largest of which are shown on the map above.

**Constanta** is Romania's most important port located on the western coast of the Black Sea. It is not only a crucial hub for trade but also a famous tourist spot. Its annual capacity is 90 million tons with a 19-meter natural depth and modern equipment. Constanta deals with many types of cargo such as dry and liquid, project and general cargo, but also passengers. Since 2016, the port has become the principal Eastern waterway for agriculture-related business to and from Romania and neighboring countries. With a grain storage capacity of 1.5 million tons and featuring the fastest cereal handling terminal in the European Union, the port has become one of the main transit hubs for Ukrainian grain exports.

**The Midia port**, a satellite port of Constanta, serves industrial (incl. petrochemical) customers in the area. Activities: transport of chemicals, oil products, fisheries, and ammonia. Ship repair and maintenance services are also provided.

**The Medgidia port** is one of the largest river ports in Romania. Situated on the Danube-Black Sea Canal, it deals with passenger ships, tankers, cranes, and general plus bulk cargo. It records 1.2 million tons of annual commercial traffic and 10.3 million tons of annual industrial traffic.

**Galati** is the second-largest Romanian port (almost 335 million sqm), the most important port of the Danube and its key activities include shipbuilding and chartering for a variety of goods. The Galati Shipyard is owned by the Damen Group which is a Dutch enterprise.

**Bechet port** is situated on the left bank of the Danube and is only accessible by road. It has three berths, of which the cereal berth is 100 meters long, the berth for general goods being 200 meters, and the oil terminal being 300 meters long. At max, it can handle ships weighing around 2,000 tons. Annual freight traffic of about 50,000 tons.

**Calarasi port** is situated near the Borcea arm of the Danube and handles 1.69 million tons of cargo annually including grain, fertilizers, coke, raw materials, and steel products as well as passenger transportation.



**The Braila port** is a river port on the Danube and is a key port in Romania for the trade and transportation of cereals. It has an enormous potential for growth if the river transport could be carried out largely by the industries in the area along with an increase in Braila's capacity to handle more cargo. There is also a need to modernize the infrastructure in the Braila Port.

**The Giurgiu port** is situated on the Danube River near the city of Giurgiu. It has a container terminal with a capacity of 30,000 TEU's. It has a goods berth, commercial berths along with passenger berths. The oil port area has commercial operative berths and waiting berths, modern pontoons for fuel maneuvering, a fuel depot, tanks and storage containers. The "Veriga" pool area used by the Giurgiu Shipyard is a hub for the construction and repair of ships.

**The Orsova port** provides shipbuilding services with annual operational capacity of 12,000,000 tons. Its major commercial activity is receiving and storing of goods, delivery of stored products, and loading and unloading of grain. It also deals with trade-in loose cement, powdery material, and bulk goods.

Port modernization works are underway in Galati (development of multimodal platform), Braila, Tulcea and Giurgiu.

## INVESTMENTS PLANNED

---

**1. Bucharest National Airports Company (CNAB) - [www.cnab.ro](http://www.cnab.ro) - has planned a massive investment program for the modernization of "Henri Coanda" Airport for the period 2023-2028.**

Several sections of the airport are to be modernized, including interior redevelopment of the terminal, installation of a centralized ventilation and air conditioning system, installation of a fire detection, signaling and extinguishing system, and modernization of electrical installations. This part of the investment plan is approx. RON 139 million (USD 30+ million) and should be completed in 2025.

**2. Constanta port** will have its railway infrastructure modernized (investment of EUR 1 billion): modernization of the train lines, the electrification of all the lines in the port, the centralized electronic signaling system, building waiting groups that relieve the reception-dispatch lines in Constanta Port, replacement of old platforms, modernization of all telecommunications installations by replacing existing equipment with state-of-the-art modern equipment and implementing new telecommunications installations. The investment value can be supplemented depending on the further evolution of prices for building materials, the investment having a deadline of 4 years.

3. The modernization of the **ports Calafat and Corabia** has seen several public tenders issued in the past, but all have been canceled due to lack of interest from potential suppliers. The latest announced tender for the "Extension of the infrastructure of Calafat Port (km 795) and systematization of the railway device of the port" was proposed with a budget of RON 72 million (USD 16 million) and for the rehabilitation and modernization of the infrastructure in Corabia Port at the amount of RON 130.5 million (USD 29 million). The tender did not attract any bids.

**In January 2023, the tender for the "Extension of the infrastructure of Calafat Port (km 795) and systematization of the railway device of the port" was re-launched** for the budget of RON 60.6 million (USD 13.2 million). The necessary works (delivery time – 36 months) include hydrotechnical works, road works, utilities for berths and roads – electricity and water supply, fire installations and perimeter and enclosure lighting, and dredging.

**In February 2023, the rehabilitation and modernization of the infrastructure in Corabia Port project was re-launched as well**, at a budget of RON 130.5 million (USD 29 million), for the "Rehabilitation and modernization of the naval transport infrastructure in ports outside the TEN-T network – Port Corabia"

4. In December 2022, the EU approved a budget of EUR 43.515 million for the **modernization of the rail infrastructure in Constanta port** given the need to identify new transport routes for the Ukrainian cereals following the Russian invasion. The needed works include: repair of 99 lines, respectively 43,193 km, 7 level crossings and 126 switches and crossings in order to make the transport of goods in the Port more efficient.

## Nuclear plants and nuclear security

---

Romania is part of the Three Seas Initiative, a U.S.-backed platform among EU member states in Central Europe that includes a focus on energy infrastructure.

The main energy policy documents of Romania are the **Energy Strategy of Romania 2021-2023**, with a perspective to 2050 and **the Integrated National Plan in the field of Energy and Climate Change 2021-2030** (NECP), which consider the option of developing a new generation of nuclear reactors, such as Generation IV nuclear reactors and or small modular reactors (SMR) after 2030, as a way to increase the share of energy with low GHG emissions.



In October 2020, the U.S. Exim Bank expressed interest in financing large investment projects in Romania, including nuclear ones, with a total amount of USD 7 billion through a Memorandum of Understanding with the Romanian Ministry for Economy, Energy and Business Climate.

In November 2021, Romania's Nuclearelectrica reached an agreement with the American NuScale Power to deploy small modular reactors (SMRs) in Romania. The U.S. government helped facilitate the collaboration on the new technology and is funding a NuScale simulator to help further Romania's ambitions of becoming a regional hub for SMR training and education.

In 2022, based on the U.S.-Romania Intergovernmental Agreement for cooperation on Romania's nuclear power program (IGA, signed in 2020), the United States and Romania initiated the Foundational Infrastructure for Responsible Use of Small Modular Reactor Technology (FIRST) program. Under FIRST, the United States will provide Romania with a NuScale small modular reactor (SMR) simulator for Romania to establish an E2 Center at University Politehnica in Bucharest.

Romania has a nuclear power plant located in **Cernavoda** on the Danube River, which produces approx. 18% of Romania's energy demand. The Cernavoda plant is operated by SN Nuclearelectrica SA (SNN), a state-owned company. The power plant was planned in the late 1970s as a five-unit plant and was based on technology transfer from Canada (Atomic Energy Canada Limited, AECL), Italy and the U.S.. Currently, two nuclear units are in operation and plans to build two more (plans which had been postponed or delayed for years) seem to become reality soon.

Cernavoda is the only nuclear power plant in Romania and consists of two 650 MWe heavy-water pressurized reactors. Unit 1 went into commercial operation in 1996 and Unit 2 in 2007. Operator Nuclearelectrica plans to extend the operating life of Unit 1 to 60 years. Most of the work on Units 3 and 4 as well as on Units 1 and 2, CANDU-6 reactors was done in the 1980s prior to the fall of the government of Nicolae Ceausescu in 1989. In July 2020, Romania launched a tender for a new feasibility study to complete Units 3 and 4.

In 2020, the United States and Romania signed an intergovernmental agreement to cooperate on Romania's nuclear power program. In the same year, the two countries agreed to cooperate on modernizing Romania's nuclear power plant (Romania cancelled prior plans to cooperate with China General Nuclear Power Corporation). According to Minister Popescu, the works would be carried out by a partnership of corporations from the U.S., Canada, and France, and the agreement gives Romania access to the US CANDU 6 technology.

The U.S. Export-Import Bank signed an agreement with Romania (in November 2022) to loan USD 50 million for the second phase of the two reactors' construction and USD 3 billion for the third phase. Romania hopes to double its nuclear power capacity by 2030.

According to Nuclearelectrica (SNN), the strategy for completing Cernavoda Units 3 and 4 is being implemented in three stages, in accordance with the international experience in the construction of nuclear power plants.

- Stage 1 started at the end of 2021 and represents the preparatory stage during which a set of engineering and safety documentation necessary for the project re-start will be prepared/updated to substantiate a preliminary investment decision.
- Stage 2 of the project consists of performing preliminary works and is estimated to last up to 30 months. This stage will consist of preparing critical engineering for project definition, structuring and contracting financing and agreeing on the adequate contractual architecture for the project implementation, obtaining the construction license, reassessing the feasibility of the project based on updated technical and economic indicators and making the final investment decision.



- Stage 3 of the project consists of site mobilization, start of the construction works, commissioning and start of the commercial operation of Unit 3 in 2030 and Unit 4 in 2031.

The Cernavoda units use CANDU-6 technology and each unit has an installed capacity of 700 MWh. The 2021 annual production was of 5,929,019 MWh for Unit 1 and 5,355,301 MWh for Unit 2.



CANDU units have an operating life of 30 years. In September 2017, SNN decided to refurbish Unit 1 to extend its operating life to 60 years (the same will apply to Unit 2 in 2037, i.e., 30 years after it has been put into commercial operation). The Unit 1 refurbishment project has now reached phase II (i.e., obtaining all needed approvals and financial resources). Phase III (the actual refurbishment procedures) will take place between 2027 and 2029.

As for nuclear waste, all used fuel is stored at reactor site for six to ten years. It is then transferred to the dry storage facility (DICA) at Cernavoda, which is based on the Macstor system designed by AECL, where it will remain for about 50 years under SNN responsibility. The first module was commissioned in 2003. DICA is designed to store the spent fuel from CNE Cernavoda Units 1 and 2 using 27 modules of type MACSTOR 200. In 2020, eleven modules were in operation, module 12 is under construction.

Currently, a new strategy for the future development of DICA has been approved. Two major changes are the future use of MACSTOR 400 modules with double capacity instead of MACSTOR 200 modules, as well as an increase of the storage area.

The national repository for industrial low-level radioactive waste (DNDR) has been operating since 1985 at Baita Bihor in two galleries of the former Baita uranium mine. Its capacity is 21,000 standard 220-litre drums. Under the Romanian law, waste rock and mine tailings are considered radioactive waste.

According to the Energy Strategy of Romania, 3 radioactive waste repositories should be put into operation by 2055:

- a surface repository for low- and intermediate-level waste, consisting of concrete cells with containers of cement-conditioned waste, covered with a concrete cap and finally a multilayer impervious cover - this repository should be completed by 2028.
- a deep geological repository for burned nuclear fuel and one for low- and intermediate-level waste will be completed by 2055.

Years ago, Romania repatriated the entire quantities of highly enriched uranium (HEU) and low enriched uranium (LEU) to the country of origin (the Russian Federation). Romania has its own uranium ore reserves, however due to lower prices offered by other suppliers, in 2016, the country started to import uranium ore for the first time in 20 years (imports coming in the beginning from Canada and later also from Bulgaria, Hungary or Kazakhstan). Nuclearelectrica (SNN) has its own nuclear fuel factory (Fabrica de Combustibil Nuclear FCN Pitesti) which produces approx. 10,800 nuclear fuel bundles for the Cernavoda Nuclear Power Plant annually.

The National Strategy for Nuclear Safety and Security was approved by a government decision in July 2014, with the objective of strengthening national legislation framework on nuclear security. The Inspectorate for Emergency Situations (IGSU) has prepared a website informing the population on measures to be carried out in case of a nuclear accident or radiological emergency. These measures include sheltering / evacuation / administration of potassium iodide (KI).

## ROMANIA AS PART OF INTERNATIONAL NUCLEAR SAFETY INITIATIVES

Romania is a party to the following multilateral instruments that promote nuclear security: Treaty on Non-proliferation of Nuclear Weapons (NPT); Convention on Physical Protection of Nuclear Material (CPPNM) and its Amendment; International Convention on Suppression of Acts of Nuclear Terrorism (ICSTANT); Comprehensive Test-Ban Treaty (CTBT).

Romania is actively involved in the Global Initiative to Combat Nuclear Terrorism (GICNT) and is committed to detecting, preventing and responding effectively to acts of nuclear terrorism by carrying out multilateral activities aimed at improving interoperability among participating states. Romanian experts regularly take part in the activities of two specific GICNT working groups, namely Nuclear Detection Working Group – NDWG and Nuclear Forensics Working Group – NFWG.

Romania is one of the countries that voluntarily report to the IAEA database on illicit trafficking of radioactive substances in such a case occurs. No high-risk events regarding illicit trafficking in dual use (civilian and military) nuclear items have occurred in Romania so far. Since the launch of the IAEA database, Romania has only reported some minor incidents, insignificant in terms of environmental and population impact.

### Dams

Hydroelectricity generates about 31% of total electricity production in Romania. There are approx. 2,000 dams which together with over 10,000 km dykes protect the population from floods. At the end of 2016 (the latest data available), the National Administration “Romanian Waters” (ANAR) published a report according to which 35% of dams (namely almost 700 dams) would not meet requirements to receive authorization. 70 dams were found to have an unknown owner.

**In late 2021, plans were announced to modernize 20 dams operated by ANAR (from categories A, B and C) in the near future, i.e. an investment estimated at USD 218 million – with funding from the National Recovery and Resilience Plan (PNRR). This investment is meant to:**

- ensure the safe operation and modernization of dams by adapting to climate change;
- ensure the modernization of hydraulic and electrical drive installations, as well as automation of hydromechanical equipment;
- adopt green measures to protect water bodies and biodiversity to ensure fish migration, ecological flow and prevention of eutrophication, with a positive effect on the water quality in storage. during the execution, take all necessary measures to preserve biodiversity and protect the environment.



The Siriu, Maneciu, Paltinu and Poiana Uzului dams are the most exposed to accident risks because they are located less than 100 km from the epicenter of Vrancea, the main seismic outbreak in Romania.



Moreover, construction works at Siriu dam began in the communist era and were finalized after the fall of communism - finishing works were done under pressure to minimize costs or even not at all: the injection of cement milk into the left and right mountains of the dam, in order to make it unbreakable, have been interrupted and the correction of torrents to the left and right of the accumulation lake to prevent landslides have not been finalized. The Siriu dam is already showing signs of weakening and experts believe that if this dam broke, it would be the biggest disaster in the history of Romania (the 122 m high dam holds 155 million m<sup>3</sup> of water).

Inspections performed in 2022 showed that the following actions are necessary at the Siriu dam:

- to rehabilitate the monitoring system and the warning-alarm system,
- to carry out with priority some rehabilitation and modernization works both at the dam and on the hydromechanical and electrical equipment.
- perform maintenance works for the safe operation of the existing hydrotechnical constructions and of the related equipment, respectively current maintenance and repair works, modernizations, refurbishments.
- priority for the deforestation on an area of 120 square meters, mechanical digging of 17 cubic meters of land, maintenance of upstream parament and downstream dam and maintenance of the spillway.

## Crude Oil Pipelines and Depots

### Pipelines

The Crude Oil National Transport System (N.T.S.) is a set of interconnected major pipelines that collects crude oil from the extraction sites or from where the oil was delivered by the producers/importers towards processing units. The N.T.S. is currently 3,800 km long and is divided into four major sub-systems. The system's transport capacity is approximately 27.5 million tons/year.

Crude Oil Transport Infrastructure			
Domestic Crude Oil	Imported Crude Oil	Rich Gas and Ethane	Crude Oil and Rich Gas
1,540 km of pipelines	1,348 km of pipelines	921 km of pipelines	13 loading ramps
6,9 million tons per year throughput	20,2 million tons per year throughput	0,33 million tons per year throughput	2 unloading ramps
126,000 mc storage capacity	45,000 mc storage capacity	663 mc storage capacity	13 locomotives and 69 railway tanks

Source: [www.conpet.ro](http://www.conpet.ro)





products are set by law. For 2022, the Government has established a minimum emergency stock level of over 1.48 million tons of oil equivalent. Its breakdown among operators obliged to create these stocks (which is also a reflection of their market share) is also set by the law:

- **OMV Petrom** accounts for 35 % of total stocks. OMV Petrom owns in Romania some of the most modern and safe oil distribution storages in Europe.
- **Rompetrol Rafinare** – 33%;
- **Petrotel Lukoil** – 15%;
- **MOL Romania** – 9%;
- **Oscar Down Stream** – 7%;
- Metropoli bus station and Tinmar Energy have shares of 0.3% each, while Globodyne Trade, Socar Petroleum, Almatar Trans, Aviarom – shares below 0.05%.

Romania and Luxembourg are the only countries where the mandatory stocks are held only by private companies, with the possibility of external delegation of stocks of up to 50% of the annual obligation, due to the lack of storage spaces on the territory of Romania. This has a direct impact on energy security (not having the security of immediate access to them in case of emergency, as provided for by European legislation).





## 2.4 PHYSICAL SECURITY MARKET

Growing modernization coupled with rising security concerns in the country has propelled the demand for video surveillance market in Romania. Growing construction industry on account of strengthening industrial, commercial, hospitality and residential sectors in recent years along with increasing government spending on infrastructure development, have resulted in a surge in the deployment of video surveillance systems in the country.

The legal framework in Romania states that companies must ensure a certain minimum level of security for their employees based on a physical security assessment made by a certified evaluator (who decides, for example, where surveillance cameras should be installed).

All institutions, including police stations must have CCTV surveillance installed and fines are applied if the surveillance equipment does not work properly.

Municipal governments install video cameras for the surveillance of public areas as well, even disregarding GDPR rules which defend people's right to privacy (breach into personal data is therefore a legitimate concern. According to experts, there is even a risk that the software of these cameras will be broken into by hackers from Russia, China, etc., especially since some of the equipment being purchased is Chinese). The recordings of these video cameras are available to municipal government and other institutions (e.g., police, prosecutors or Romanian secret services) to watch when needed.

The number of surveillance systems installed by municipal governments in public spaces (at crossroads, in parks, at playgrounds, etc.) is constantly increasing. (Bucharest has already 4,500+ cameras; in Cluj Napoca, the number of cameras doubled in 2022 compared to 2021. In some villages, cameras are even installed in fields, because mayors believe that these surveillance systems help citizens feel safer and help reduce thefts and prevent citizens from disposing of waste in unauthorized areas.)

Between 2019 and spring 2022, the Romanian authorities have invested EUR 40 million in 8,300 contracts for the purchase of video surveillance systems to monitor public areas.

Sales of smart security systems for residential clients increased by 20% in 2022. The penetration rate of smart security systems installed in homes is forecasted to reach 33.5% by 2026, according to Assa Abloy Romania. In 2022, there were 0.5 million clients of smart security products, showing that demand in this residential sector is in its early stages, lagging far behind other European states. In 2022, Romanian (individuals) have allocated a budget of RON 2,500 (i.e., USD 565) for equipping their homes with products such as smart locks, smart surveillance cameras, or biometric safes.

Romania imports security and surveillance products from all over the world, including the U.S.



## 2.5 CYBER DEFENSE & SECURITY

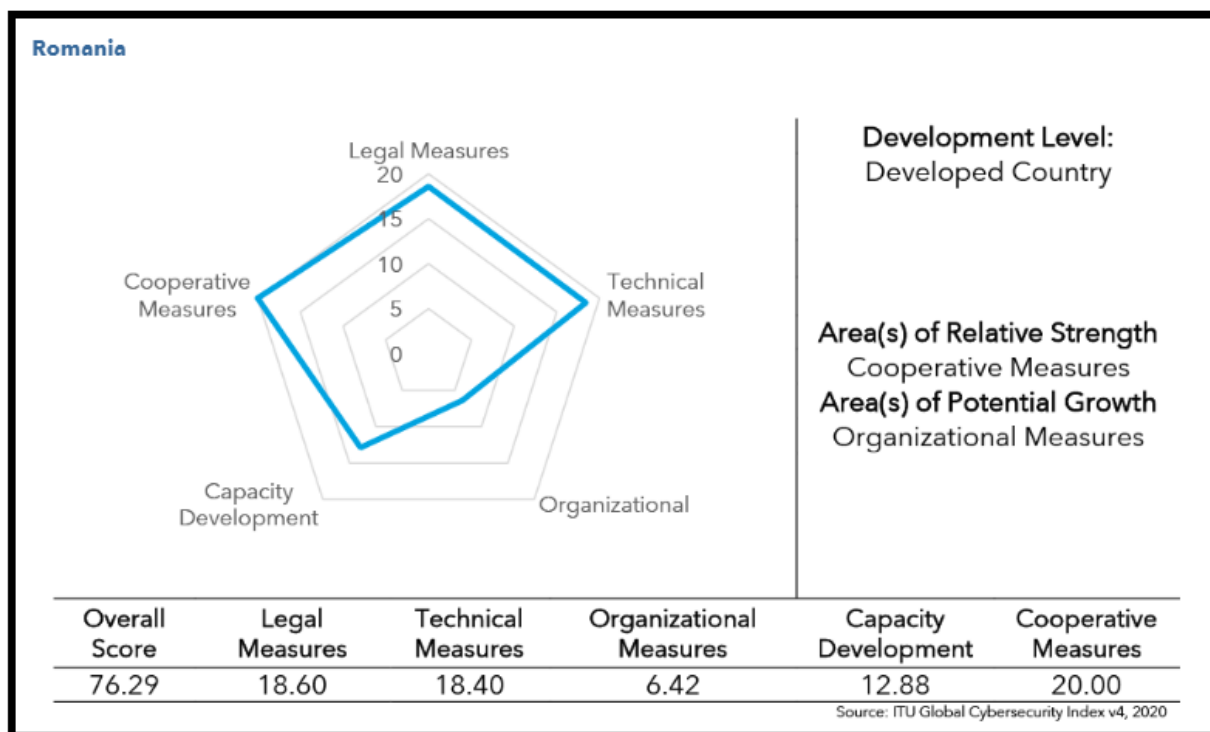
Romania’s IT market is one of the fastest growing markets in Central and Eastern Europe.

Romania is the leader in Europe, and 6<sup>th</sup> in the world, in terms of the number of certified IT specialists, with density rates per 1,000 inhabitants higher than in the US or Russia, and hosts an impressive number of international technology companies (including IBM, Microsoft, Oracle, Amazon, HP, Eset, etc.).

**Romania hosts a newly established EU Cybersecurity Competence Centre.**

he 2020 Global Cybersecurity Index (GCI) by ITU<sup>2</sup> ranks Romania 62<sup>nd</sup> in the world and 32<sup>nd</sup> in Europe with score of 76.29 out of 100:

### Romania: cybersecurity country profile



Source: ITU Global Cybersecurity Index 2020

According to a December 2022 study by Proxyrack, Romania is the 7<sup>th</sup> most cyber-secure country in the world, with a National Cyber Security Index score of 89.61 out of 100.

In 2022, the volume of cyber threats in Romania grew at a rate in line with global trends but exceeded the protection capabilities of many Romanian organizations. According to the National Directorate of Cyber Security (DNSC), the number of computer attacks rose by 22%. The DNSC detects 500,000+ security events daily but estimates that this figure represents less than 20% of the actual number of events.

<sup>2</sup> <https://www.itu.int/epublications/publication/D-STR-GCI.01-2021-HTM-E>



In 2022, the Cyberint National Center (part of Romanian Intelligence Service SRI) managed to prove that all three Russian intelligence services – FSB, GRU and SRV – were conducting operations targeting institutions of the Romanian Government, as well as critical infrastructure at the national level. At the same time, there were several DDoS attacks (+21% in 2022) on websites belonging to public institutions, parties and media companies in Romania. For example, the pro-Russian group Killnet performed cyber assaults hitting the websites of the Romanian MoD, Border Police, public passenger railway company CFR Calatori and a financial institution, putting them out of service for several hours.

As a result of Russian cyber threats and propaganda, Romania has banned the use of software and internet security / antivirus solutions of Russian origin in the country's public institutions<sup>3</sup> and also in companies that manage classified information. These organizations had time until April 28, 2023 to uninstall any Russian software they might have been using and to purchase, test and implement new one. (The law contains a list of prohibited software which includes X SIGNAL; Metascan; Dr. Web; Kaspersky Security; RPA RusBltech; VipNet).

**The ban on the use of Russian software is currently valid until December 31, 2026 and covers:**

- **device security (endpoint security) products and services;**
- **antivirus, anti-malware, web application firewall detection software and applications;**
- **virtual private networks;**
- **endpoint detection and response systems.**

Some of the key Romanian players in the cyber-security sector are:

#### **BITDEFENDER**

[www.bitdefender.ro](http://www.bitdefender.ro)

A global cybersecurity leader. Romanian cyber-security producer established in 2001, now has a worldwide network of millions of consumers, businesses, and government environments. The company has the world's largest infrastructure for delivering security. Bitdefender Labs discovers 400 new threats each minute and validates 30 billion threat queries daily. Bitdefender detects, anticipates and takes action to neutralize threats anywhere in the world in less than 3 seconds.

#### **UTI GRUP**

[www.uti.eu.com](http://www.uti.eu.com)

A leading military-related system developer and integrator, presenting multiple solutions: cyber security, command and control, software applications, Tempest equipment, video analysis and integrated security systems for military purposes. The solutions developed by **certSIGN**, a UTI member company and an important player in the national cyber security market, are internationally recognized: certSAFE and shellSAFE's have been included in the NATO Information Assurance Product Catalogue (NATO NIAPC). These can be used to process NATO classified information up to NATO RESTRICTED level.

#### **National Institute for Research & Development in Informatics - ICI Bucharest**

<https://ici.ro/en/>

The Institute performs advanced and applied research within the national research and development programs and the European profile programs, and provides services in areas such as computer networks, cloud computing and cyber security. Main fields of R&D include, among others, cyber security of computer systems and networks, digital forensics, cyber diplomacy, new information technologies (blockchain); protection of critical infrastructures; informatics for public administration and other areas of social and public interest, for business and industry.

---

<sup>3</sup> Many public institutions (Bucharest municipal government included) are currently using Kaspersky antivirus because it was cheaper.

## CYBER SECURITY ON NATIONAL AND INTERNATIONAL LEVEL

---

Romania undergoes a continuous process of strengthening cyber security nationwide, both from a legal, institutional, and procedural point of view, and efforts are being made by all authorities with responsibilities in this field.

The Romania's first Cyber Security Strategy (dated 2013) established the conceptual, organizational and action framework necessary to ensure cyber security and aimed at protecting cyber infrastructures in line with new cyber defense concepts and policies elaborated and adapted at NATO/ EU level.

Romania now faces good opportunities for economic growth and social development through new technologies and the rapid implementation of increased interconnectivity. Investments opportunities regard the Internet of Things, artificial intelligence, machine learning and 5G communication technologies.

The cyber threat to Romania is increasing, with three categories of attackers carrying out cyber-attacks:

- persons and entities associated with state actors;
- persons and groups carrying out cybercrime activities;
- persons and groups of hackers with ideological, political or extremist-terrorist motivation.

A challenge to cyber security is also represented by the exploitation of information networks and systems on the Romanian territory subsequently use in cyber-attacks directed against entities from other states. Thus, the attackers use infrastructure elements on the Romanian territory, especially for the creation of command and control servers or for the creation of intermediate points within the attack infrastructure, which allow them a better anonymization of hostile activities.

Especially after the war in Ukraine began, cyber-attacks carried out against Romania by entities associated with state actors have targeted networks and information systems belonging to several Romanian public administration authorities and institutions, the main objective being the exfiltration of strategic information from areas of interest.

According to the new **Cyber Security Strategy (for the period of 2022-2027)**, Romania plans to develop its cyber security capacity for prevention, deterrence and response, as well as resilience, including a proactive approach. This will be done by the development and implementation of effective defense capabilities and proactive mechanisms to respond to current and emerging cyber-attacks. This current Cyber Security Strategy emphasized the strategic importance of cybersecurity and sets 5 strategic objectives for the period 2022-2027:

1. Secure and resilient networks and information systems;
2. Consolidated normative and institutional framework;
3. Pragmatic public-private partnership;
4. Resilience through a proactive and deterrent approach;
5. Romania - a relevant actor in the international cooperation architecture.

**The National Cyber Security System (SNSC)** is an integrated national system, responsible for supervising implementation of all prevention and response measures against cyber-attacks on public institutions or private companies. SNSC brings together public authorities and institutions with responsibilities and capabilities in the area.

The **Supreme Defense Council (CSAT)** is the authority that coordinates the SNSC's activity at the strategic level. SNSC includes public authorities with competence in the field (Romanian Intelligence Service - SRI, Ministry of Defense, Ministry of Interior, Ministry of Foreign Affairs, Ministry of Information Society, Special Telecommunications Service, Foreign Intelligence Service - SIE, Protection and Guard Service - SPP, Office of the National Registry for State Secret Information and the Secretary of CSAT), but also players from the non-government, professional and business associative environment.



Cyber security alerts are processed at the national level by the **National Directorate of Cyber Security (DNSC)**. This Directorate is an independent structure of expertise and R&D in the field of cyber infrastructure protection, which has the capability to prevent, analyze, identify and respond to cyber security incidents of computer systems that provide public utility functions or provide services of information society. The DNSC is coordinated by the Prime Minister and is entirely financed from the state budget.

**CERTMIL** is the Main Technical Center for cyber security incidents response within the MoD.

Headquartered in Bucharest, **the European Cybersecurity Competence Centre** (ECCC, <https://digital-strategy.ec.europa.eu/en/policies/cybersecurity-competence-centre>) is tasked with funding and coordinating cybersecurity research projects. Bucharest was selected from a list of 7 EU cities. It aims at reinforcing the European Union's resilience, deterrence, and response to cyber-attacks and to retain and develop essential cyber-security technological capacities to secure the EU's Digital Single Market (DSM). The Competence Centre will implement parts of the Digital Europe and Horizon Europe programs by allocating grants and carrying out public procurements.





## 3 PUBLIC PROCUREMENT SYSTEM

---

The main legislation on public procurement aims to transpose the EU legislation and includes the following acts and their amendments:

- **Act No. 98/2016** on Public Procurement
- **Government Decision No. 395/2016** on approval of application rules for legal provisions regarding awards of public procurement contract/framework agreement
- **Act No 101/2016** on remedies and appeals regarding public procurement contracts award
- **Government Ordinance No. 114/2011 on award of certain public procurement contracts in the field of defense and security** - applies to the supply of military products and/or sensitive products, to works, products and services directly related to the aforementioned products, to works and services for specific military purposes or sensitive works and services / to products related to non-military security such as border protection, police activity and crisis management missions, critical infrastructure protection in public utility sectors such as transportation and energy.

### Main stipulations of Act No. 98/2016 and its updates

---

Starting 2021, foreign companies are not allowed to bid unless they are established in one of the 48 countries listed by the amended law (countries that fall into one of the categories below. The **U.S. is one of the countries included on this list**):

- I. EU Member States
- II. Member States of the European Economic Area (EEA)
- III. Third countries that have ratified the World Trade Organization Agreement on Government Procurement, to the extent that the awarded public procurement contract falls under the scope of Annexes 1, 2, 4 and 5, 6 and 7 to the European Union's Appendix I to the respective Agreement
- IV. Third countries in the process of joining the European Union
- V. Third countries not covered by point (iii), but which are signatories to other international agreements under which the European Union is obliged to grant free market access in the field of public procurement.

The law provides for equal treatment of both domestic and foreign bidders. Foreign bidders must submit a certified translation of their bidding documents into Romanian.

Awarding procedures regulated by Act No 98/2016 are applicable when the value of the contracts to be awarded is equal or higher than the following thresholds (thresholds for which the purchase must also be publicized in the Official Journal of the European Union) :

- RON 26,093,012 (approx. **USD 5,676,000**) - for construction works
- RON 678,784 (approx. **USD 148,000**) - for services or supply contracts
- RON 1,042,363 (approx. **USD 228,000**) – for goods and services purchased by the Bucharest-county council, the local council, the General Council of the Municipality of Bucharest, as well as the public institutions subordinate to them
- RON 3,636,150 (approx. **USD 791,000**) - for contracts concerning social services or other services presented in Annex 2 to the Act (i.e., health, legal, social security services).



Under these thresholds, the contracting authority shall implement a simplified awarding procedure regulated by Government Decision No. 395/2016, observing general principles for granting public procurement contracts.

Contracting authorities **may directly award** contracts with estimated value lower than:

- RON 270,120 (approx. **USD 59,000**) for product and services contracts
- RON 900,400 (approx. **USD 196,000**) for construction works contracts

There are 9 possible procurement procedures stipulated by Act No. 98/2016 and for cases where the estimated contract value is higher than the thresholds mentioned above, the most frequently used are the following two (for both of them the most economically advantageous bid will win the tender):

- **Open procedure** – it is a one-stage procedure; any interested company can submit their offer in response to a tender notice.
- **Restricted procedure** – consists of two stages, and only bidders selected by the contracting authority at the first stage will be invited to submit bids in the second stage

#### Procurement procedures according to Government Ordinance No. 114/2011

Procedures for awarding public procurement contract in the field of defense and security:

- **Restricted procedure** - any bidder can submit a request to participate in the tender but only selected bidders have the right to actually submit their bid. There are usually two stages (1 - candidate selection / 2 - evaluating bids submitted by selected candidates) but the contracting authority does have the right to decide on the organization of an additional stage.
- **Competitive dialogue** – any party can submit a request to participate in response to a tender notice. The contracting authority then conducts a dialogue with selected participants in order to identify one or several solutions suitable for its needs. After finding the most convenient solution, the contracting authority calls for the submission of bids. This type of procedure is used for contracts of great complexity when the contracting authority is not able to define technical specifications or establish financial / legal implementation of the project.
- **Negotiated procedure with publishing** – usually two stages: 1 - selecting candidates who have submitted request to participate in the tender / 2 - negotiating the contract with selected candidates, including price.
- **Negotiated procedure without publishing** applies only if the restricted procedure, negotiation with publishing, competitive dialogue or call for tenders resulted in a situation where no bid was submitted or all bids were inappropriate / irrelevant to the subject of the contract. The application of a negotiated procedure in this case is only possible after the initial procedure has been canceled and only if initial requirements set out in the tender documentation are not substantially altered; the contracting authority also has the obligation to send information to the European Commission if this information is requested;



- **Call for tenders - simplified procedure** – the contracting authority requests bids from several parties. This is a one-stage procedure.

**The most commonly used procedures are restricted procedure and negotiation with publishing.** Publication of tender notices is done in the Romanian Electronic System for Public Procurement (SEAP) and in the Official Journal of the European Union.

At present, Romania's Ministry of Defense (MoD) is considering Foreign Military Sales (FMS) cases as the first option for acquisition. International companies may be asked to contribute to this goal on a volunteer basis under FMS cases or under the offset law for all commercial contracts over EUR 2 million (USD 2.2 million). In recent years, national security interest was invoked based upon security of supply, as a mandatory criterion for awarding contracts in these cases, with related industrial cooperation or offset obligations defined from the beginning. The Romanian Parliament must approve defense acquisitions in excess of EUR 100 million (USD 110 million).

### Foreign Military Sales (FMS)

---

The United States has approximately USD 6.2 billion worth of active sales cases for U.S.-origin defense articles and services to Romania under the Foreign Military Sales (FMS) program. Recent and significant sales include, for example, Naval Strike Missile coastal defense systems, F-16-related equipment, Patriot missile systems, and HIMARS.

From 2017 to 2021, the United States authorized the permanent export of USD 296 million in defense articles (including agreements) to Romania via Direct Commercial Sales (DCS). The top USML categories were XI: Military Electronics (USD 210 million), II: Weapons & Armament (USD 23 million), and XII: Fire Control, Laser, Imaging, and Guidance Equipment (USD 4 million).

### Foreign Military Financing (FMF)

---

In 2022, in recognition of its support to Ukraine and the challenges related to the Russia's invasion, the U.S. Department provided Romania with an additional USD 148 million in bilateral and CRIF Foreign Military Financing (FMF) assistance. This builds on significant investments from 2018-2021, during which the Department provided Romania USD 148.5 million in FMF. This includes both bilateral assistance and support for the Black Sea Maritime Domain Awareness initiatives and countering Russian influence. The Department also provided USD 6.52 million in funding for International Military Education and Training, which provides professional military education and training to military students to increase professionalization, build capacity in key areas, enhance joint interoperability, create a better understanding of the United States, and build lasting military-to-military relationships. Since 2022, the Department has provided over USD 410,000 in Peacekeeping Operations (PKO) funding through the Global Defense and Reform Program to embed an acquisitions advisor at the Ministry of National Defense. Institutionalizing an effective and transparent acquisition process will enable Romanian forces to be better equipped.

### MoD - Section of Armaments and Acquisitions

---

Within the **MoD**, the **General Directorate for Armaments** is in charge of developing procurement policies and coordinating their implementation within the Ministry, managing resources for the purchase of goods and services used by the Army, evaluating and certifying MoD suppliers of systems and equipment for



defense, coordinating the activities of the **National Company ROMTEHNICA SA (the import-export company of the MoD)**, and acting as a secretariat to the Procurement Council.

Address:

9-11 Drumul Taberei,  
061418 Bucharest, Romania  
Telephone: +40 213 195 826  
Email: [secretariat@dpa.ro](mailto:secretariat@dpa.ro)  
Head of the General Directorate for Armaments: Lieutenant General Mr. Teodor Inciçaș

**ROMTEHNICA SA (STATE ENTERPRISE)**

Address:

5C Timisoara Blvd, 6th district, P.O.Box 061301, Bucharest  
Telephone: +40 213 185 004  
Email: [marketing@romtehnica.com.ro](mailto:marketing@romtehnica.com.ro)  
General Director: Mr. Nicolae Nasta (email [director.general@romtehnica.com.ro](mailto:director.general@romtehnica.com.ro))

The Romanian Office for Offsetting Special Technique Procurements

---

The Offset Agency (<https://ocats.gov.ro/>) is subordinated to the Ministry of Economy, Energy and Business Environment and its major responsibilities include:

- Framing procurement policies
- Providing guidance to contracting authorities/entities and public tenders
- Preparing legislation
- Monitoring the implementation of public procurement rules
- Publishing and sharing information
- Maintaining relations with their counterparts

Address:

19 Pictor Alexandru Romano, Bucharest sector 2, Romania  
Telephone: + 40 213 115 867, + 40 213 115 868  
Email: [office@ocats.gov.ro](mailto:office@ocats.gov.ro)  
The head of this Directorate is Ms. Cristina Corina Dragomirescu

Mol – General Logistics Directorate

---

The General Logistics Directorate coordinates, directs and controls activities in logistics and investment planning, elaborates policy documents regarding the endowment of the Mol units with modern technical means and equipment to ensure compatibility with similar structures in other NATO/ EU states.

The head of this Directorate is the Police Chief Quaestor Dr. Eng. Ion Peligrad

Address:

3 Eforie street, Bucharest sector 5, Romania  
Telephone: + 40 213 104 649  
Email: [comunicare@mai.gov.ro](mailto:comunicare@mai.gov.ro), [mai@mai.gov.ro](mailto:mai@mai.gov.ro)



## Romanian Police – Logistics Directorate

---

The Logistics Directorate is responsible for:

- management of logistics of the General Police Inspectorate and subordinated structures;
- elaborating and updating investment programs of Romanian Police's General Inspectorate;
- organizing and implementing, in accordance with legal provisions in force, the procedures for public procurement of products, works and services provided in the approved annual programs for police units, according to their competencies

The head of this Directorate is the Police Chief Commissioner Mr. Marius Dragnea

Address:

6 Mihai Voda, Bucharest sector 5, Romania

Telephone (phone operator): + 40 212 082 525

Email: [igpr@politiaromana.ro](mailto:igpr@politiaromana.ro)





## 4 ROUTE TO MARKET AND MARKET OPPORTUNITIES

### 4.1 ENTERING THE ROMANIAN MARKET

Good opportunities exist for U.S. companies supplying high-end, advanced products, which can certainly attract local authorities and fit the needs of the Army, Police, or the private market.

Opportunities exist especially in the military field, as Romania is undergoing a process of modernizing and upgrading its equipment and technologies. Examples of products and services of interest to the defense sector (to purchase, modernize or overhaul) are:

- Tracked and wheeled armored vehicles (especially armored personnel carriers, MBT's, infantry fighting vehicles and their derivatives), as well as non-armored all-terrain vehicles
- Infantry weapons and ammunition
- Artillery systems and ammunition (especially field artillery systems - MLRS, self-propelled 155 mm and 105 mm howitzers, including ammunition)
- Individual and group armaments and equipment: individual and collective CBRN detection and protection systems, NATO-compatible individual weapons and specific equipment, including those for special forces, portable antitank missile systems, advanced individual combat systems
- Missile systems and rockets, ground-based air defense systems - SHORAD/V-SHORAD and Manpad; air target systems for GBAD training; deployable radio relay modules
- Powders, explosives
- Equipment and subsystems: budget targeting especially engineering and counter IED equipment, C4ISR systems — integrated communication information systems, brigade and division C2, specific equipment for tactical air controllers' teams (JTAC), satellite communication system (SATCOM), network security systems, IT strategic equipment stocks, software, etc.
- Low and medium altitude radar systems
- Upgrades to used US fighter aircraft, combat and transport aircraft, including specific communication and positioning systems
- Combat ships – Type 22-R frigates revamping, turbines, antisubmarine torpedoes, antipiracy capabilities, multifunctional corvettes, missile fast attack boats, mine hunters, riverine vessels, minelayer and minesweeper, assault boats and other naval platforms
- Support ships – for special forces operations, harbor and maritime tug, riverine tug and logistic support ships
- Static and mobile ISR and electronic countermeasures systems - optical and optoelectronic equipment, ISTAR equipment, radars, ground mobile electronic warfare systems for the Air Force, SCOMAR system (Black Sea Traffic Control, Surveillance, Observation Complex System), CBRN reconnaissance and data processing equipment, maritime situation surveillance equipment, hydro weather systems, etc.
- UAS class 2 and 3 with capabilities for targeting ASuW and weaponization
- Infrastructure for air bases and military sites
- Other products for operational support, including integrated security systems for military units/objectives, ROLE-2 deployable medical facility and security containers.
- Replacement parts and service
- Defense training and consultation

Since Romania is a member of the European Union and the World Trade Organization (WTO), and a strategic partner of the USA since 2011, U.S. companies can act on the same business terms as if entering



any other EU market. Most provisions governing Romanian imports have been EU-harmonized, some are national. The Customs Authority can be contacted to check import duties on specific products.

U.S. firms can gain access to the Romanian defense and security markets via the following channels:

- Direct exports (esp. in case of defense equipment or spare-parts/components for aircraft, ships, etc.)
- Establishing a branch in Romania
- Contracting a local importer/distributor (e.g., in the case of security products or equipment meant for the police/ penitentiary / forensics, etc.)
- Acquisition of a local company (this would provide an immediate access to local production know-how as well as existing distribution channels and certifications)

Romania does not have a tradition of commission-only agents: sales agents usually work as employees of a company and are paid a salary to which a commission on performed sales can be added.

Having a local partner who has the right connections with various authorities can be a great advantage for obtaining information on what products are needed on the market, what certificates are needed, what can be done to improve an offer and have better chances to win a tender.

## 4.2 ASSOCIATIONS, PUBLICATIONS AND FAIRS

### TRADE SHOWS

Name: **ROMANIAN SECURITY FAIR**  
 Website: [www.romaniansecurityfair.eu](http://www.romaniansecurityfair.eu)  
 Date: November 09-11, 2022  
 Venue: Bucharest  
 Profile: Biannual event, organized by the Romanian Association for Security Technology together with Romexpo (exhibition organizer).



Name: **BLACK SEA DEFENSE AND AEROSPACE**  
 Website: [www.bsda.ro](http://www.bsda.ro)  
 Date: Conference on May 30, 2023  
 Exhibition in May 2024  
 Venue: Bucharest  
 Profile: The largest exhibition of military, aeronautical and security equipment in Eastern Europe (400+ exhibitors and 30,000+ visitors in 2022). International tri-service defense Exhibition and Conference dedicated to Defense, Aerospace, Homeland Security, Cyber Security and Safety & Security, officially supported by the Romanian Government. The only exhibition in Romania officially certified by the US Department of Commerce. Exhibition is held every 2 years. Organized by TNT Productions Romania and TNT Productions, LLC.



### ASSOCIATIONS & ORGANIZATIONS

Name: **Romanian Business Association of Military Technology Manufacturers (PATROMIL)**  
 Website: [www.patromil.ro](http://www.patromil.ro)  
 Description: Association of 200+ Romanian companies in R&D, production, trade and marketing in the market of military and security equipment, material, and services.



Name: **Romanian Association for Security Technology (ARTS)**  
 Website: [www.arts.org.ro](http://www.arts.org.ro)  
 Description: Association of producers, integrators and distributors of security products.



Name: **National Association for the Security of Information Systems (ANSSI)**  
 Website: <https://anssi.ro/>  
 Description: The most important national association in cybersecurity, having approx. 50 companies active in the ICT industry as its members.



## PUBLICATIONS

Name: **ALARMA**  
 Circulation: n/a  
 Frequency: Monthly  
 Website: <http://revista-alarma.ro/>  
 Publisher: ROMANIAN ASSOCIATION FOR SECURITY TECHNOLOGY (ARTS)  
 Description: Magazine for security professionals as well as general public interested in security market trends.



Name: **CER SENIN**  
 Circulation: n/a  
 Frequency: 3-months period  
 Website: [www.roaf.ro/?page\\_id=7920](http://www.roaf.ro/?page_id=7920)  
 Publisher: Romanian Air Forces  
 Description: Air Forces' publication.



Name: **REVISTA FORTELOR TERESTRE**  
 (Land Forces Magazine)  
 Circulation: n/a  
 Frequency: 3 times per year  
 Website: <http://rft.forter.ro/>  
 Publisher: Romanian Land Forces

