STIKK
KOSOVO ICT ASSOCIATION

KOSOVO IT BAROMETER 2019

DECEMBER 2019

KANTAR

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About STIKK

As a catalyst to the dynamic technology industry, STIKK accelerates growth and progress for the fast-paced economy. it shapes the industry at large. STIKK provides a platform that unites technology leaders to connect and collaborate, and it avidly supports members who push the boundaries to propel technology forward.Since its establishment in 2008, STIKK was able to achieve numerous successes and become one of the leading drivers of the ICT industry and ICT community in Kosovo. Striving towards the development of the ICT industry, STIKK implemented numerous projects aimed to promote the ICT sector of Kosovo, improve its regulatory framework, implement research and industry specific analysis, and facilitate professional development of sector's constituents.

STIKK currently accounts for 200+ members, which represents 90% of the whole ICT market of Kosovo. STIKK is dedicated to help out the long-term-growth of the Information and Communications Technology industry in Kosovo; is committed to improving the business environment for the ICT, as well as promoting the contribution of the Information and Communications Technology to economic growth and social progress in Kosovo.STIKK seeks to participate in the development and implementation of policies by helping the Government and Institutions of Kosovo to understand current and future technology trends, and how technology can contribute to the economic growth of the country.

STIKK
KOSOVO ICT ASSOCIATION

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EXECUTIVE SUMMARY

This study was conducted by Kosovo ICT Association (STIKK) with the purpose of gathering data on the operation and development of the IT sector in Kosovo. The survey is a follow up to the “IT Barometer”, which is being carried out yearly by STIKK.

To gather information for this survey, a sample of 38 IT companies operating in Kosovo was used. The data gathering and analysis of the IT Barometer took place between September and December of 2019.

KEY FINDINGS

The ICT sector in Kosovo is relatively new, however it is developing fast, as the IT Barometer study discovers year after year.

As a considerable amount of companies are working in the international market, the potential and experience in the international market seems to be of immense importance for the ICT sector in Kosovo. Namely 61% of the IT companies participating in the research work in the international market, compared to the local market which stands for 39% of their market.

Companies have found different ways to do business with international companies. According to the IT companies surveyed, by far the most popular way is direct exports from Kosovo to the client abroad. Others are doing business by a subsidiary / branch office in the target market, as a distribution partner / Local Partner (sales agent), with a representative office, as well as a joint venture.

The most popular local horizontal markets are document management, followed by Business intelligent / Data Warehousing, Business process optimization, E-commerce and Product maintenance, Support and Customization.

According to the companies participating in this research Central Europe, USA and UK have the highest potential to export to, namely Switzerland and Germany, followed by North America (USA and Canada), and United Kingdom. East Asia, and Middle East and Africa are seen with little or no potential to export.

Despite the increase in the average number of employees from 14 in 2018 to 16 in 2019, the IT industry does not have many difficulties in retaining their employees as almost half of the companies (42%) have had a turnover rate of 10 to 25 percent. Nevertheless, companies also believe that they will easily find new employees. Half of the interviewed companies believe that they will find a new employee in less than 3 months, 36% believe that they will find a new employee in 3-6 months, 11% in more than 6 months.

The positive trend in the rise of average number of employees and their salaries is expected to continue in 2020.

In terms of how IT companies in Kosovo operate, they provide mainly Software/IT services, followed by services for hardware products and Software products. They use mainly Windows and .NET technologies to deliver services. And JAVASCRIPT, HTML, XML and PHP are most used programing languages. While, the most popular database technologies amongst the IT companies are MSQL/MYSQL, followed by MS SQL Server.

The most popular sector for the local needs is the financial services, followed by Public Sector, Utilities and Telecommunications (Wireless and Mobile), whereas the most popular sector for the international market is the IT Services and Outsourcing and Utilities.

The technical certifications that apply to their employees are long. More than half of the sample namely 58% of them declared that the Project management professional certification (PMP) applies to their employees followed by Microsoft certificates 53%, Scrum 50%.

INTRODUCTION

Information and Communication Technology (ICT) has started to play a major role in the economic growth of Kosovo, since it has become a destination of regional and international companies seeking for outsourcing services. Being a strategic sector of the country, governmental institutions and international institutions operating in Kosovo have provided their support towards the growth of the ICT sector by ensuring the empowerment of the sector's main actors.

Considering that the IT sector in Kosovo is relatively new, with most companies being created after 2000s, it is experiencing a rapid growth and quickly moving towards global ICT trends. Established in 2008, STIKK remains one of the biggest supporters of the ICT sector and ICT community as it continuously bases its activity in promoting the ICT Sector in Kosovo. STIKK's goals are achieved by implementing activities based in its main pillars as Export Promotion, Improving Company Excellence & Quality, Investment Promotion, Domestic Market Development and IT Promotion Policy.

IT Barometer is a vehicle of STIKK to support the Kosovo ICT sector with the aim to:

- Provide an overview on the development of the IT sector;
- Support the export capacities of ICT companies in Kosovo;
- Provide recent trends in the IT industry;

STIKK commissioned Kantar Index Kosovo to perform data processing & data analysis and to prepare the 2019 Kosovo IT Barometer report, whereas the data collection was conducted by STIKK itself.

These basic information on ICT companies in Kosovo is meant to provide an insight of the value of the national ICT market, including the export capacity.

The South East Europe IT Industry Barometer (SEE ITIB) has been carried out in Kosovo since 2014. It is supported by Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ).

SEE ITIB Kosovo 2019 focuses on exploring the following issues related to the IT sector in Kosovo:

- General overview on the companies and the IT sector in Kosovo;
- Comparative analysis;
- Recent export trends between targeted countries (export potential, export activities, international cooperation, export barriers);
- Analysis of Human Resources;

RESEARCH METHODOLOGY

The research approach that was used for the IT Barometer 2019 was done by a quantitative survey, through computer assisted web interviewing (CAWI) technique.

The sample frame consists of the list of IT companies in Kosovo composed by STIKK. The overall sample consists of 38 interviews with IT companies.

The questionnaire for the "IT Barometer" is a standardized questionnaire used in South East Europe, more precisely The South Europe It Barometer (SEE ITIB). The questionnaire was updated and adapted by the STIKK project team for local needs. The questionnaire was then loaded to Survey Monkey survey management system and sent out to companies to fill out.

The data collection for this survey was completed between September and December of 2019.

FINDINGS

KOSOVO IT COMPANIES INFORMATION

In order to understand the IT companies in Kosovo better, we asked some general information about where and how they are registered.
The data reveals that the vast majority of the IT companies operating in Kosovo that participated in the research are located in Kosovo (37), only one of them has its headquarters in Slovenia.
Some of the companies have also branches in other countries like in Albania and Switzerland and the United Stated of America.
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FIGURE 1: WHERE IS YOUR COMPANY LOCATED? (N=38)

The majority of the organizations (90% of them) has 50% national ownership, whereas only 10% of them are a branch of a foreign company, the company works only for the partner company or the other companies belonging to the group.

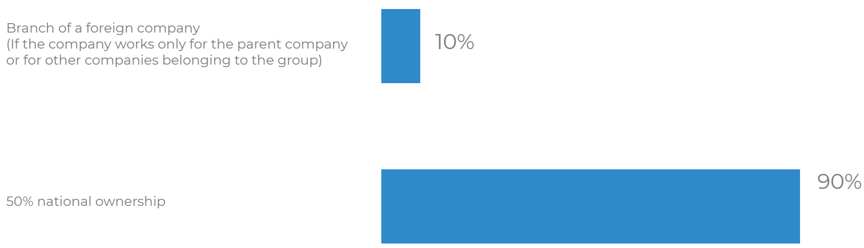

FIGURE 2: WHICH TYPE OF OWNERSHIP STRUCTURE APPLIES TO YOUR COMPANY? (N=38)

When it comes to associations, all of the participating companies in the IT Barometer 2019 are members of the STIKK association, whereas only a limited number of them (5%) are member of other associations such as BCC (Business Consultant Council), and 3% are a member of the BIT Alliance: Bosnia and Herzegovina.

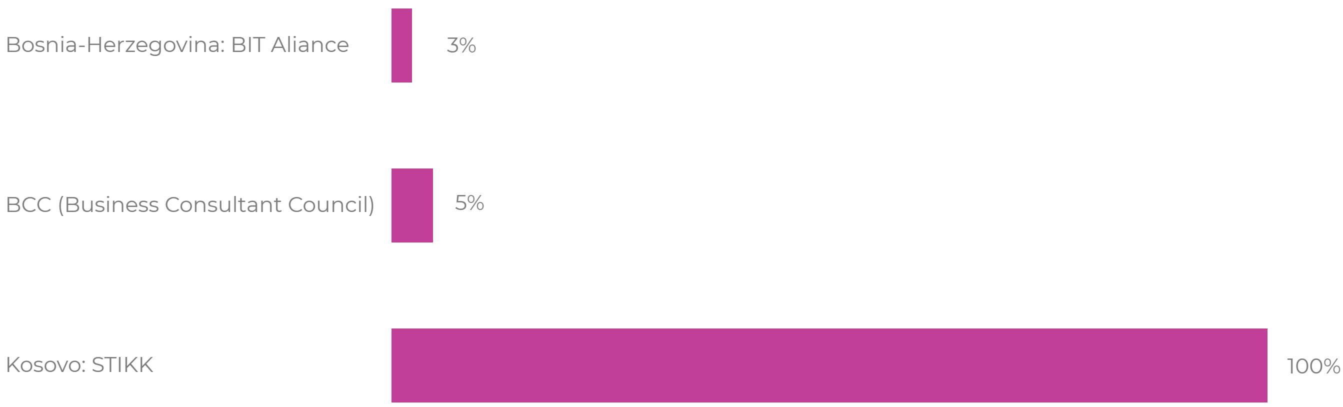

FIGURE 3: YOUR COMPANY IS A MEMBER OF WHICH ASSOCIATION: (N=38)

TRENDS IN THE INDUSTRY

In order to have an overview on the products and services and to understand the recent developments we have asked the companies on what are the products/services that they provide. Software/IT services are on top of the list, and are provided by 87% of the IT companies, followed by Services for hardware products (82%) and Software products (76%). A third of the IT companies namely 26% of them provide hardware products and 11% of the companies provide other services and products like: Cyber security, customer care, BPO, E-procurement, Digital Marketing (specifically SEO and SEA), Document Management Services, ICT Consulting & Audit, Information Security and, Business Solutions, Education and Training, etc.

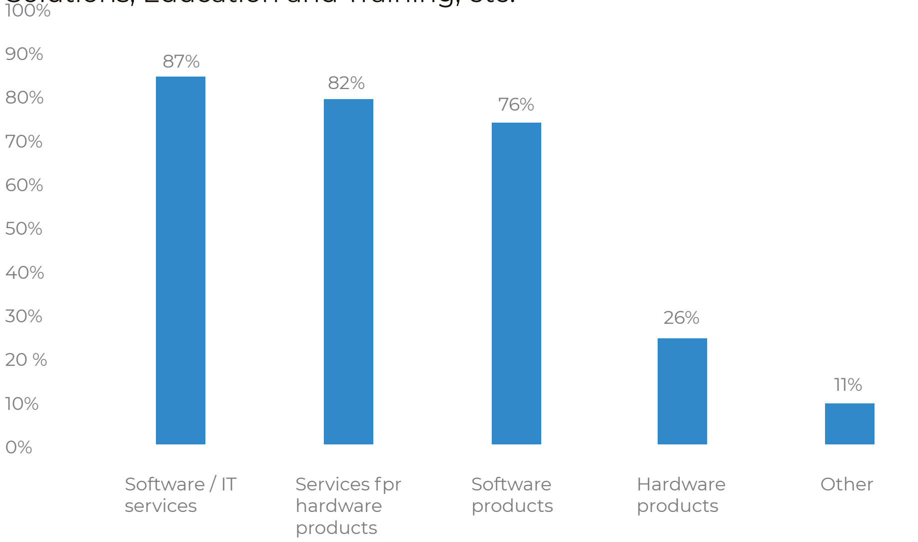

FIGURE 4: WHICH PRODUCTS AND/OR SERVICES DOES YOUR COMPANY PROVIDE? (N=38)

When it comes to usage of operating systems the vast majority of the IT companies in Kosovo uses Windows (95%), followed by Linux (66%), MAC-OS (63%), Android (61%), iOS (55%) and only a limited of the companies namely 16% of them uses UNIX as an operating system.

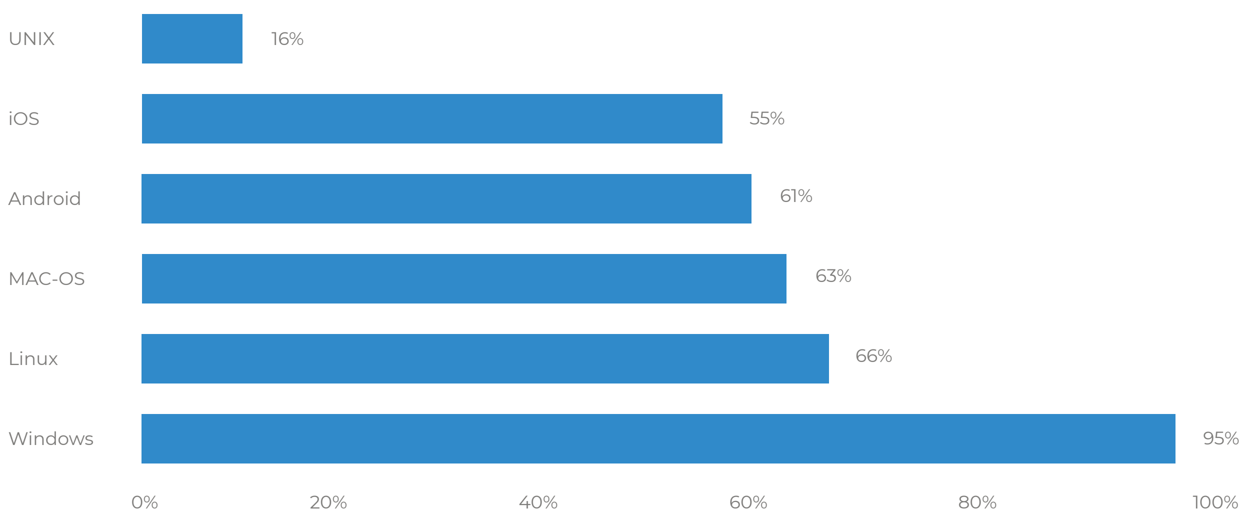

FIGURE 5: WHAT KIND OF OPERATING SYSTEMS AND PLATFORMS DO YOU USE? (N=38)

The list of technologies used to deliver services is rather long. The main one is .NET used by 58% of the sample, whereas the other ones presented on the table below are also used often such as Artificial Intelligence 18%, Xamarin 18%, VR/AR 13%, and Blockchain 11%. 34% of the IT companies participating in this survey mentioned many other technologies they use such as: in house produce software's, PHP Laravel, NodeJS, ReactJs, React Native, VueJS, SCADA & PLC and many more.

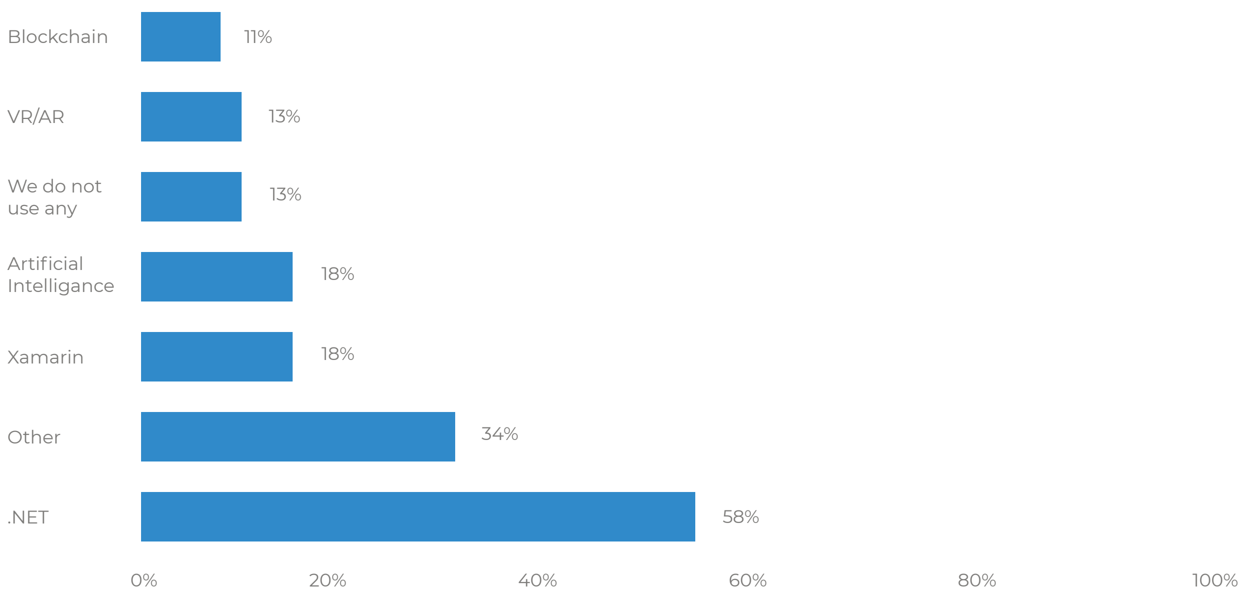

FIGURE 6: WHICH TECHNOLOGIES DO YOU USE TO DELIVER SERVICES/DEVELOP PRODUCTS? (N=38)

To understand even better the working environment in terms of technology usage, we have asked them to indicate which programing languages and development tools they use in their work.
The most popular programing language amongst the IT companies is JAVASCRIPT, followed by HTML, XML, PHP, JAVA, C++, C, Script Languages – others, PYTHON, PL/SQL, SWIFT, Objective C, Basic – Visual Basic, VBA etc., RUBY ON RAILS, c#, Delphi, VISUAL OBJECTS, Perl.

Many have declared other programming languages (16%) such as: NodeJS, Flutter, VC, AngularJS, SingalR, visual studio code, ReactJs, React Native, VueJS, Rust, and SCALA.

PROGRAMING LANGUAGES AND DEVELOPMENT TOOLS	PERCENTAGE OF USERS
JAVASCRIPT	76%
HTML, XML	68%
PHP	63%
JAVA	55%
C++	40%
C	29%
SCRIPT LANGUAGES - OTHERS	29%
PYTHON	24%
PL/SQL	24%
SWIFT	24%
OBJECTIVE C	16%
OTHER	16%
BASIC – VISUAL BASIC, VBA ETC.	13%
RUBY ON RAILS	13%
WE DON'T USE ANY	13%
C#	11%
DELPHI	5%
VISUAL OBJECTS	5%
PERL	3%

Table 1: WHICH PROGRAMMING LANGUAGES AND DEVELOPMENT TOOLS DO YOU USE? (N=38)

The most popular Database Technologies amongst the IT companies are MSQL/MYSQL, followed MS SQL Server, Oracle, Apache, noSQL, ACCESS, JDBC, followed by CASSANDRA, IDMS, SAS, Object Store and RDB.

The other database technologies used (13%) are: AuroraDB, DynamoDb, RDS, Neptune DB (Graph DB), Firebase, Postgresql, MongoDB, RWAS.

DATABASE TECHNOLOGY	PERCENTAGE OF USERS
MSQL/MYSQL	82%
MS SQL SERVER	61%
ORACLE	32%
APACHE	27%
NOSQL	24%
OTHER	13%
ACCESS	5%
JDBC	5%
DON'T KNOW	5%
WE DON'T USE ANY	5%
CASSANDRA	3%
IDMS	3%
SAS	3%
OBJECT STORE	3%
RDB	3%

Table 2: WHICH DATABASE TECHNOLOGIES DO YOU USE? (N=38

The below table presents in detail the IT sectors where the companies are engaged in.

There is also a difference whether the companies are working for the local or international market with work related to the specific sectors of interest.

The most popular sector for the local needs is the financial services by 24% of the sample, followed by Public Sector, Utilities and Telecommunications (Wireless and Mobile) at 21%, whereas the most popular sector for the international market is the IT Services and Outsourcing (58%) and Utilities at 37%.

	KOSOVO	INTERNATIONAL MARKET
AEROSPACE	-	3%
AUTOMOTIVE	3%	5%
DEFENCE	3%	5%
EDUCATION (E-LEARNING)	16%	16%
FINANCIAL SERVICES	24%	26%
GAMING AND ENTERTAINMENT	3%	11%
HEALTHCARE SERVICES	8%	18%
HOME AUTOMATION	5%	-
INDUSTRY APPLICATION AND AUTOMATION	3%	11%
IT SERVICES AND OUTSOURCING	16%	58%
MANUFACTURING, DISTRIBUTION, RETAIL	11%	6%
MARKETING AND COMMUNICATIONS	8%	16%
MEDIA AND PUBLISHING	13%	3%
NON-PROFIT ORGANIZATIONS	16%	5%
PUBLIC SECTOR (E-GOVERNMENT)	21%	5%
REAL ESTATE	3%	3%
SERVICES (HR, ACCOUNTING, LEGAL)	3%	16%
UTILITIES	21%	37%
TELECOMMUNICATIONS (WIRELESS AND MOBILE)	21%	11%
TOURISM AND HOSPITALITY	5%	5%
TRADE, TRANSPORTATION AND LOGISTICS	-	11%

TABLE 3: WHICH SECTORS DO YOU CURRENTLY OPERATE IN KOSOVO AND INERNATIONAL MARKETS? (N=38)

In order to operate in different international markets in many cases companies seek international quality standards, which seems not to be the case for a lot of IT companies, since more than a half, namely 61% of the companies have declared that they have not obtained any quality standards.

If any ISO 27001 and ISO 9001 are the most popular quality standards to be obtained amongst IT companies in Kosovo.

ISO 9001 is obtained by a third of the companies (34%), whereas ISO 27001 is obtained by a quarter of the companies (26%).

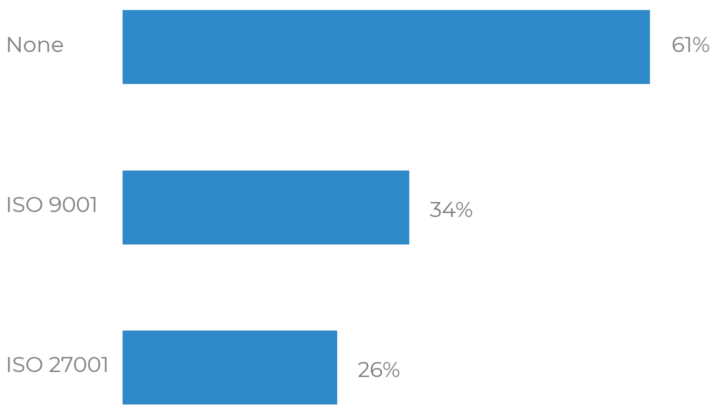

FIGURE 7: WHICH OF THE FOLLOWING QUALITY STANDARDS DOES YOUR COMPANY OPTAIN? (N=38

Whereas when asked what were the reasons that they had obtained the ISO 27001 and ISO 9001 standards were, 29% of them stated that these quality standards improve processes in the companies, 11% of them stated that it was required by clients/potential clients and 8% of them stated that they obtained them because it would improve the image and reputation of their company.

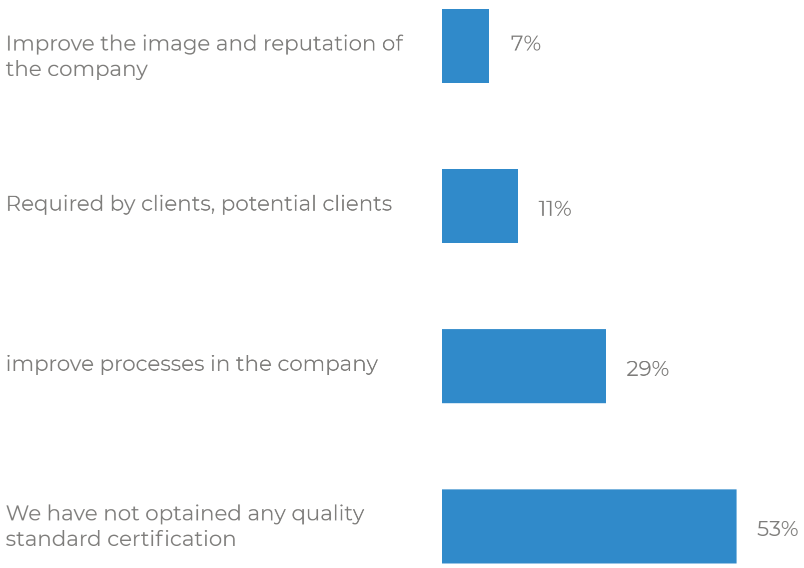

FIGURE 8: WHICH IS THE PRIMARY REASON OF OBTAINING A QUALITY STANDARD FOR YOUR COMPANY? (N=38)

The companies participating in the research exercise were asked to elaborate on the technical certifications that apply to their employees.

The list of certifications is long and diverse. More than half of the sample namely 58% of them declared that the Project management professional certification (PMP) applies to their employees followed by Microsoft certificates 53%, Scrum 50%, Cisco 37%, DecOps Certificates 29%, Jira 24%, ISTQB Certified Tester 18%, Other 29% namely: AWS Certificates, Linux Certificates, Azure, Cyber security Certificates Digital Marketing Certified, Facebook Blueprint Certified, Google Partner, Switzerland Global Enterprise, ITIL, internal academy certificates, Reisswolf Document Management Certification, Vmware, Ec-council, HPE, Dell EmC, Xerox certificates
Whereas 13% of the companies have declared that none of the certifications apply for their employees.

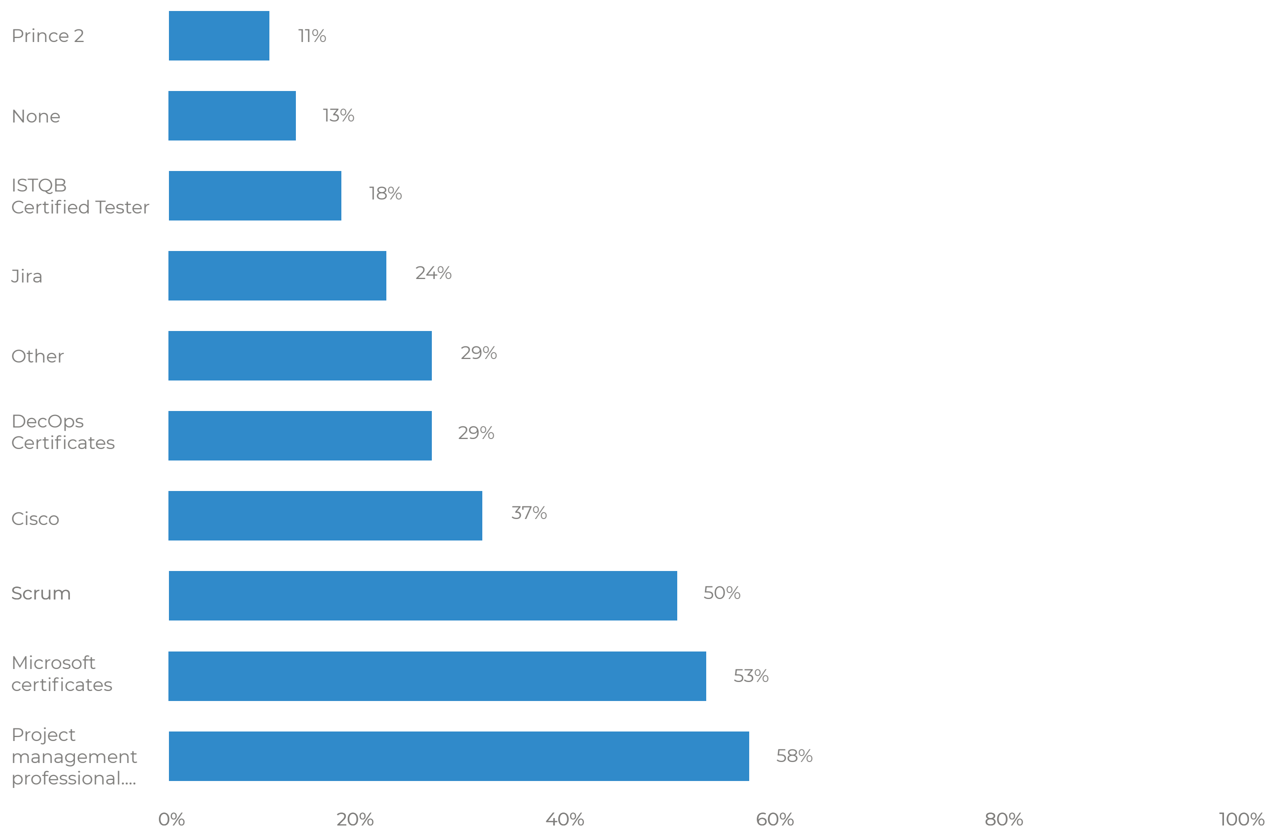

FIGURE 9: WHICH OF THE FOLLOWING TECHNICAL CERTIFICATIONS APPLY TO YOUR EMPLOYEES? (N=38)

EXPORT OF IT SERVICES AND PRODUCTS

As a considerable amount of companies are working in the international market, the potential and experience in the international market has been explored further in the following section.

Namely 61% of the IT companies work in international market, compared to the 39% in local market.

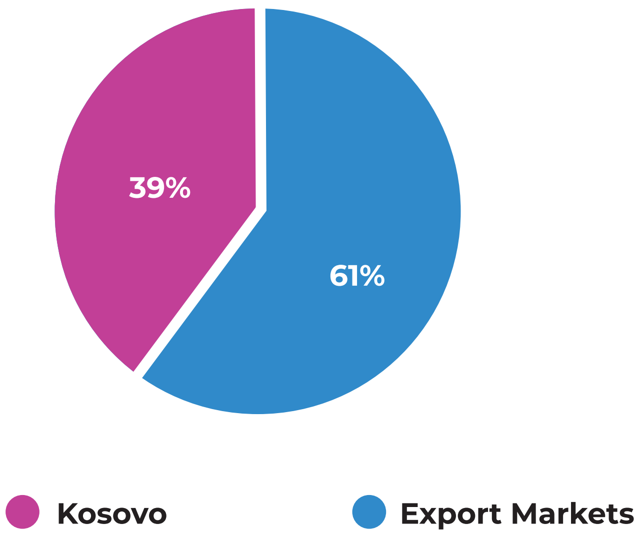

FIGURE 10: WHAT IS THE PERCENTAGE OF THE MARKET LOCALLY AND INTERNATIONALLY? (N=37)

Companies have found different ways to do business with international companies, according to the IT companies. By far the most popular way is direct exports from your country to the client abroad 68%. Others are doing business by a subsidiary / branch office in the target market 26%, as a distribution partner / Local Partner (sales agent) 26%, with a representative office 18%, and as a joint venture 8%.

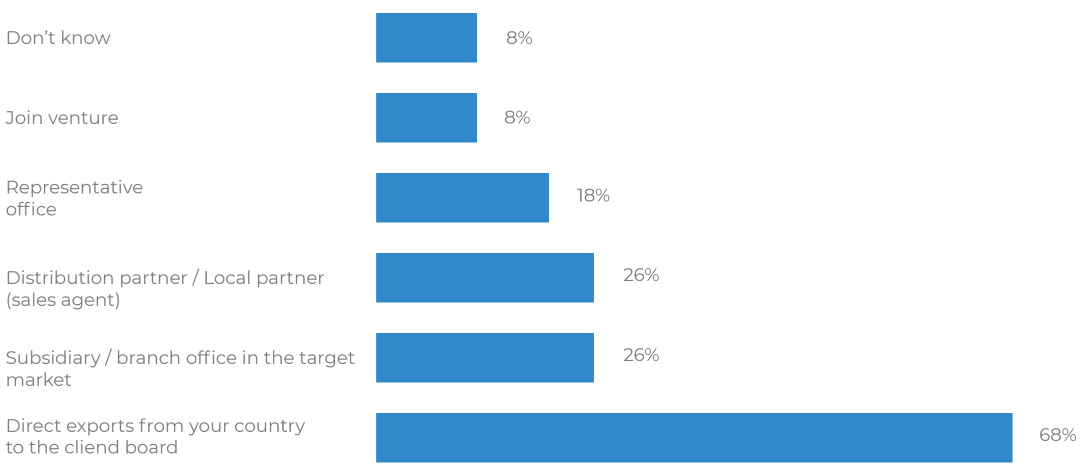

FIGURE 11: HOW DO YOU DO BUSINESS IN EXPORT MARKETS? (N=38)

The table below presents in detail the horizontal markets where the companies are engaged in.

The most popular local horizontal markets are document management 18%, followed by Business intelligent/ Data Warehousing, Business process optimization, E-commerce and Product maintenance, Support and Customization (13% each).

Whereas the most popular horizontal market for the international market are Custom Development/Outsourcing 42%, Business Process Optimization 34%, Web design; development and IT consulting 32%, and many others.

	DOMESTIC MARKET	EXPORT
BUSINESS INTELLIGENCE / DATA WAREHOUSING	13%	8%
BUSINESS PROCESS OPTIMIZATION	13%	34%
CORPORATE SECURITY	8%	3%
CUSTOM DEVELOPMENT / OUTSOURCING	11%	42%
CUSTOMER MANAGEMENT (CRM)	3%	26%
DOCUMENT MANAGEMENT	18%	3%
E-COMMERCE	13%	26%
EMBEDDED ENGINEERING AND DEVELOPMENT	3%	11%
ERP / SUPPLY CHAIN	8%	11%
IT CONSULTING	8%	32%
IT PROJECT MANAGEMENT	5%	24%
KNOWLEDGE MANAGEMENT / OPERATIONS	3%	13%
MOBILE SOLUTIONS	5%	24%
NAVIGATION APPLICATIONS	-	5%
NEW MEDIA PRODUCTION (MULTIMEDIA/WEB ANIMATIONS)	5%	5%
PRODUC MAINTANANVE, SUPPORT AND CUSOMIZATION	13%	26%
SOFTWARE QUALITY ASSURANCE	3%	21%
TOOLS/COTS		5%
WEB DESIGN; DEVELOPMENT	11%	32%
CYBERSECURITY SERVICES	-	3%
BANKING SOLUTIONS	-	3%
TOOLS/COST	-	3%

TABLE 4: WHICH HORIZONTAL MARKET DO YOU CURRENTLY PROVIDE IT PRODUCTS AND/OR SERVICES? (N=38)

The companies were also asked to evaluate the export potential for different countries in the world. According to the companies participating in this research Central Europe, USA and UK have the highest potential to export to. The countries with the highest export potential that were mentioned were Switzerland, Germany, followed by North America (USA and Canada) and United Kingdom.

East Asia, and Middle East and Africa are seen with no potential to export with 41% and 21% respectively. Also 10% of the companies considered that exploring within the region has no potential.

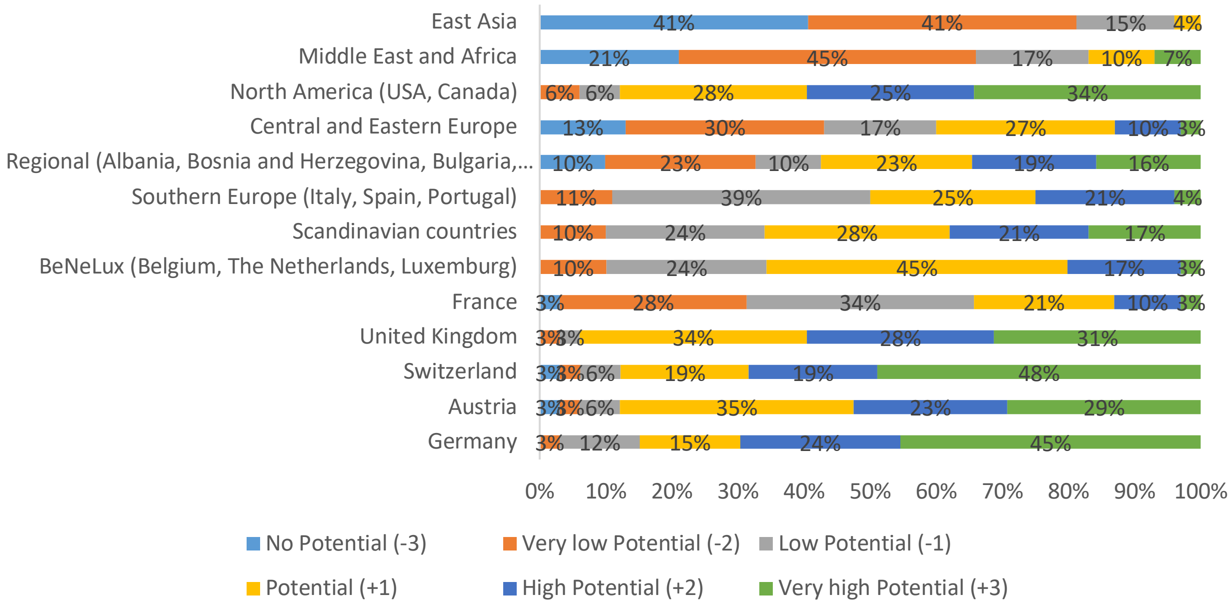

FIGURE 12: RATING OF EXPORT POTENTIAL (N=27-33)

HUMAN RESOURCES

Kosovo is the country with the youngest population in Europe. More than 70 percent of its people are under the age of 35, according to the Kosovo Agency of Statistics.

These young people work with a lot of potential and passion and with these people companies are outscoring their services more and more nowadays.

According to the companies, 92% of them declare that quality of their work is the main advantage of their company. A considerable high number of companies namely 84% of them stated that Technical know-how (knowledge of the methods or techniques of doing something, especially something technical or practical) is an advantage. Half of the companies stated Sector know-how (knowledge of specific sector focuses and requirements) as an advantage, 42% of the companies mentioned Horizontal know-how (the ability of adopting across many different types of industry by many different types of customers) as an advantage, 40% believe that the prices that they provide are an advantage, 37% believe so for the cultural knowledge, whereas 29% believe that the knowledge of languages is an advantage.

FIGURE 13: WHICH ARE THE CORE COMPETITIVE ADVANTAGES OF YOUR COMPANY? (N=38)

When it comes to languages, the ability to speak several languages of average Kosovars is also mentioned by the companies participating in the research. Almost all employees of the companies speak English, followed by German (74%), Turkish (24%), Serbian/Croatian (24%), French (13%), Italian and Spanish (5%).

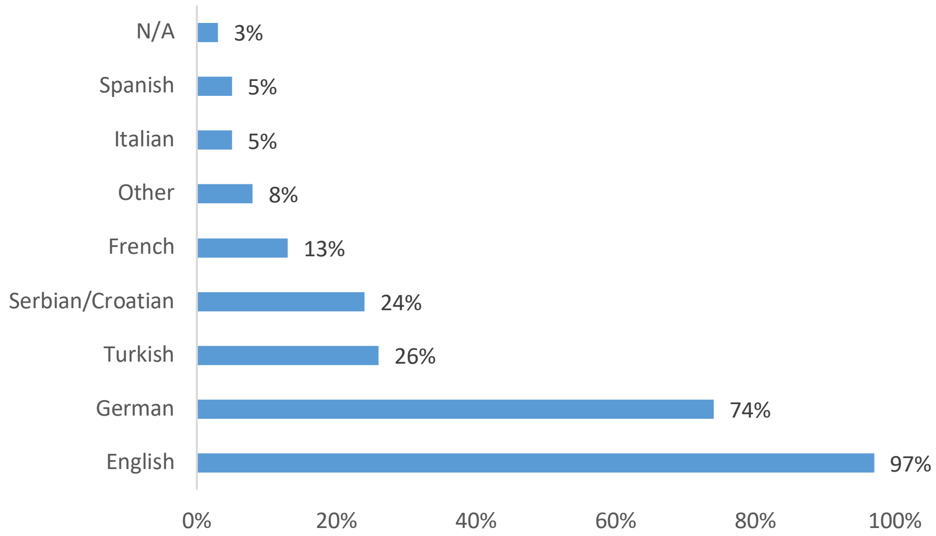

FIGURE 14: WHICH LANGUAGES DO YOUR EMPLOYEES SPEAK? (N=38)

Companies have also been asked to identify and rate the main obstacles while doing business in the export market. The lack of business contacts in the target market and visa requirements have been identifies as the main obstacles.

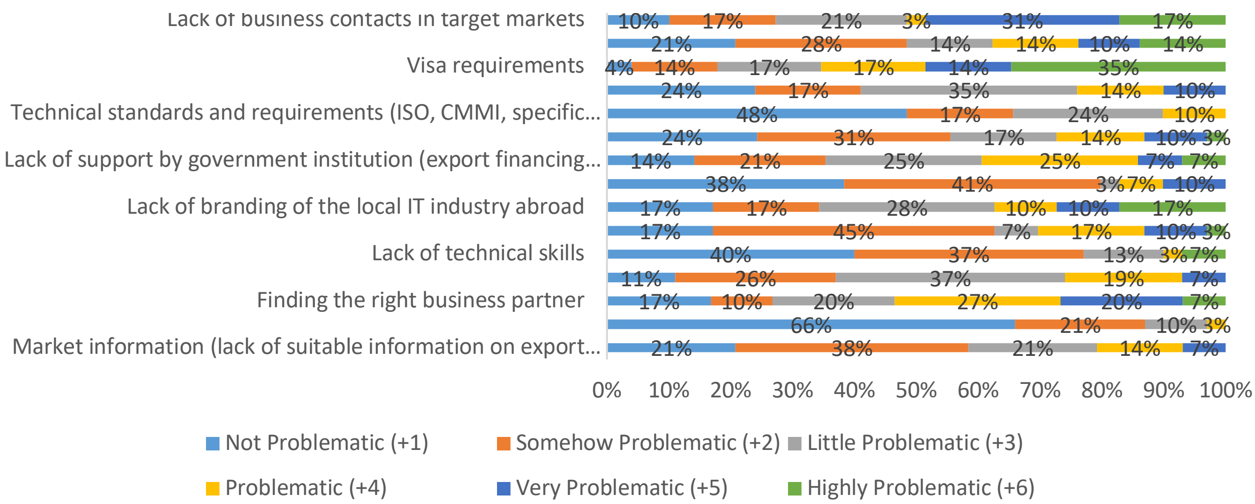

FIGURE 15: OBSTACLES IN DOING BUSINESS IN EXPORT MARKETS (N=27-30)

FINANCIAL PERFORMANCE

In order to dig deeper into the benefits of working in the export market, financial indicators such as comparing the share between the export market and the share of the revenue have been asked to the companies participating in the research.

The declared average of revenues for the year 2017 was 1.5 million Euros, for 2018 it was 1.2 million Euros, whereas they believe that they had a decrease to around 1 million Euros in year 2019.

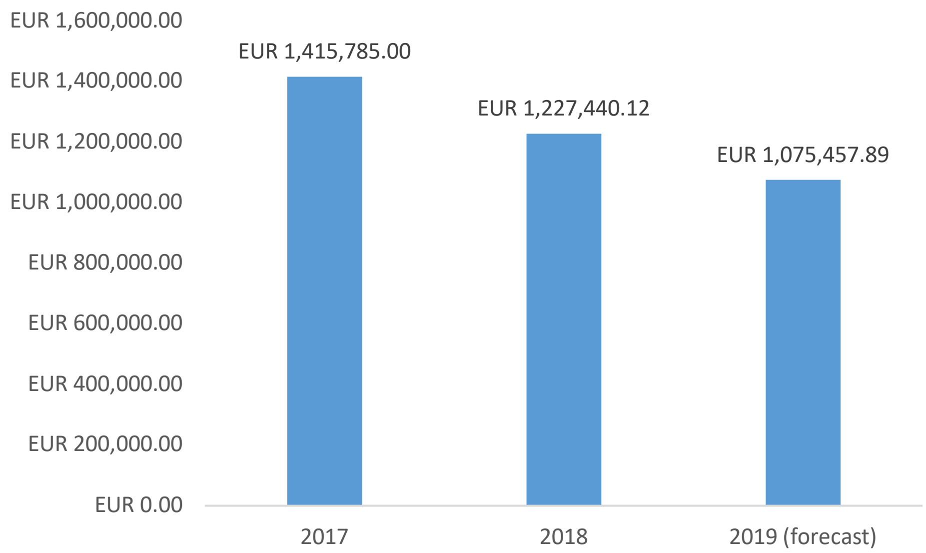

FIGURE 16: WHAT WAS YOUR ANNUAL REVENUE IN EUR? (N=16-18)

The total of exports the past three years has increased, by 10% compared to 2017. This year 65% of the revenues of the companies comes from export.

Also the revenues from exporting in the EU market are almost three times higher compared to exports in non-EU countries (51% in EU countries and 14% in non-EU countries for the year 2019). This trend was similar in 2018 as well as 2017 in this regard.

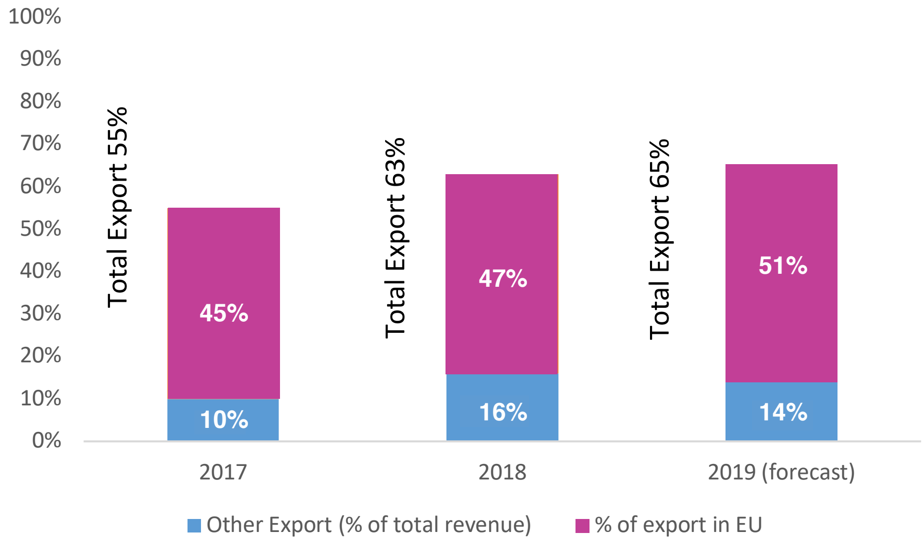

FIGURE 17: WHAT WAS THE EXPORT FOR THE YEARS 2017, 2018 AND FORECAST FOR 2019? (N=23-24)

When talking about number of employees, the number has been increasing steadily with an average from 11 in 2016 to 16 in 2019. When looking whether they are dealing with Kosovo clients or International clients, the number of employees that deal with local clients is still higher than the number of employees that deals with the international clients. With that being said the number of employees dealing with international clients has doubled since 2017.

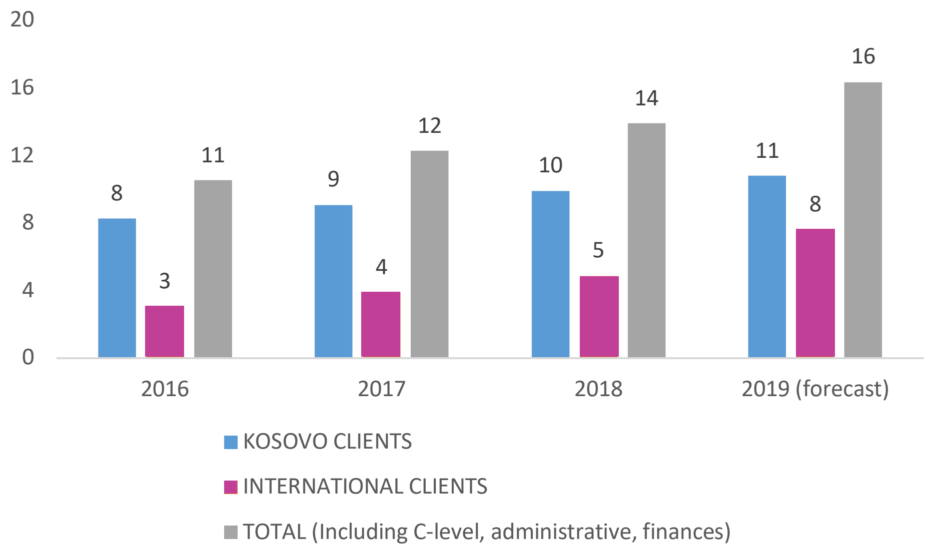

FIGURE 18: NUMBER OF EMPLOYEES AND ASSOCIATIES? (N=19)

Most of the staff works in Technical duties with an average of 14 employees in this duty, followed by other specific duties (8 employees), C-level (4 employees) and administration and finance with an average of 4 employees.
When we look at the gender of those employees, the biggest difference is in the technical duties and the C-level management employees, where men dominate twice as much over women.

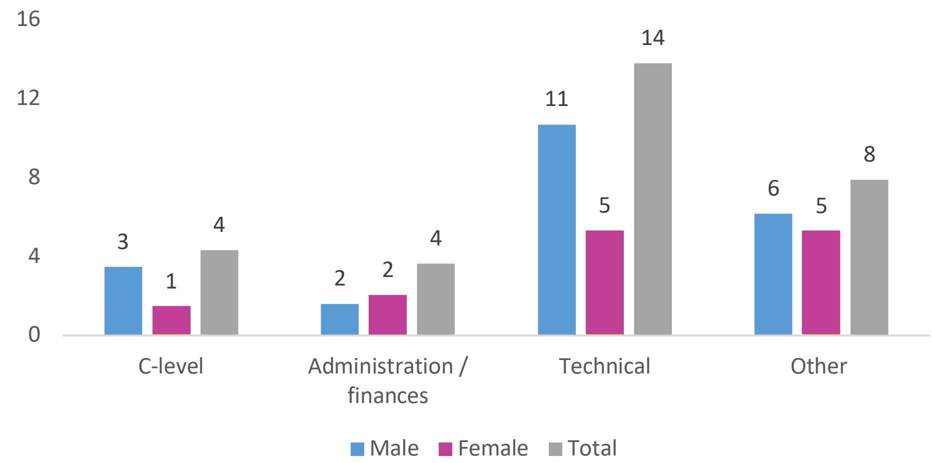

FIGURE 19: EMPLOYEE STRUCTURE (N=32)

We have also asked the companies to estimate an employee turnover rate, where 56% of them declared below 10% turnover rate, 42% of the companies declared a 10-25% turnover rate and only 3% declared that they have a 25% or higher turnover rate.

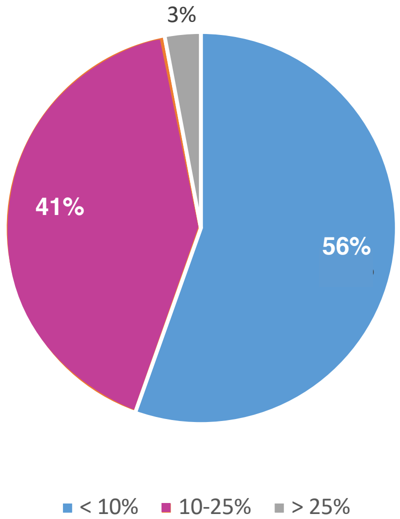

FIGURE 20: WHICH IS YOUR EMPLOYEE TURNOVER RATE? (N=36)

Although the turnover rate is not that high, companies also believe that they will easily find new employees. Half of the companies believe that they will find a new employee in less than 3 months, 36% believe that they will find a new employee in 3-6 months, and 11% in more than 6 months.

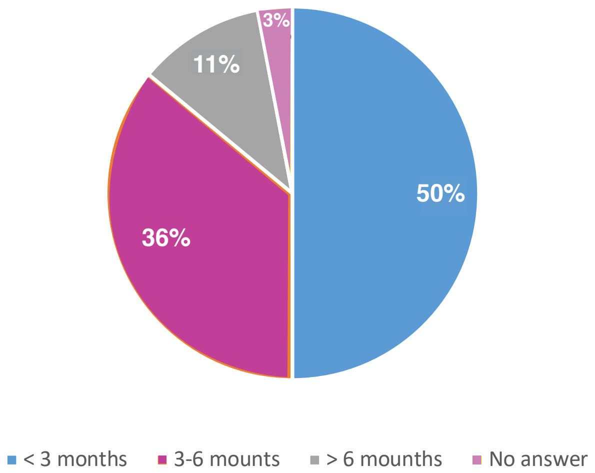

FIGURE 21: HOW LONG DOES IT TAKE FOR YOU TO REPLACE EXISTING EMPLOYEES? (N=36)

Companies have also declared average monthly salaries for different job titles of their employees.

On average for all job titles they have declared that there was an increase in terms of salaries for the year 2019.

The highest average salary for 2019 of 1,336 EUR is received by a Business Developer Manager, with an increase of 136 EUR compared to last year, and followed by a Project manager who receives on average 1,106 EUR with an increase of 65 EUR compared to last year.

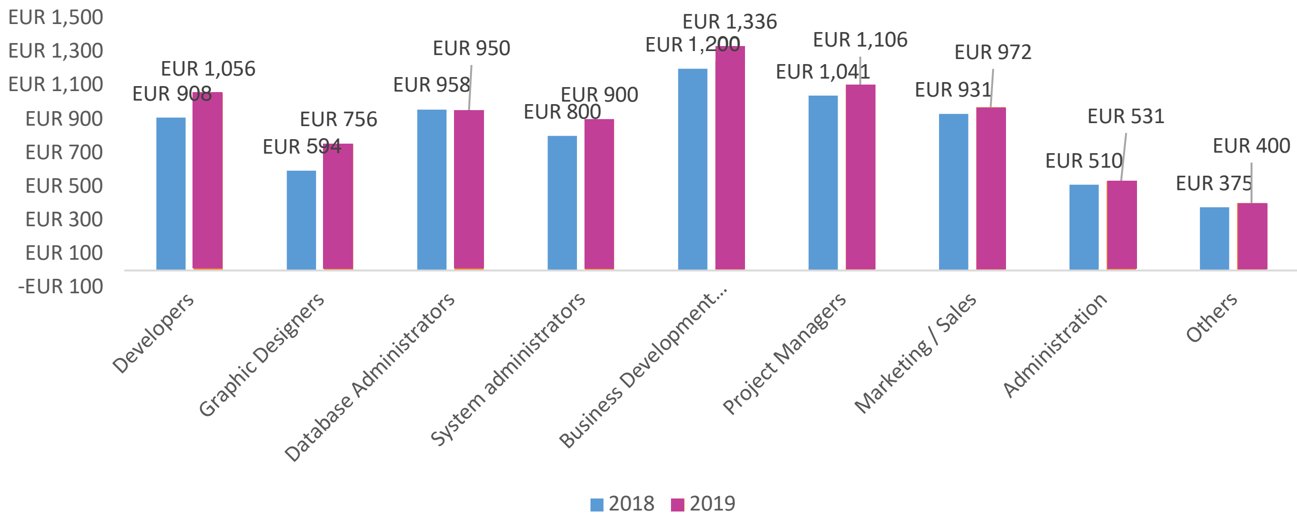

FIGURE 22: WHAT HAS BEEN THE AVARAGE MONTHY SALAIES FOR 2018 AND PROJECTIONS FOR 2019? (N=8-19)

Whereas developers seem to receive the highest average billable rate of 30 EUR per hour, followed by Project Managers 29 EUR per hours, Database administrators 27 EUR per hour, System administrators 25 EUR per hour, Business Developer Management 24 EUR per hour, and the lowest is paid to Graphic Designers with 21 EUR per hour.

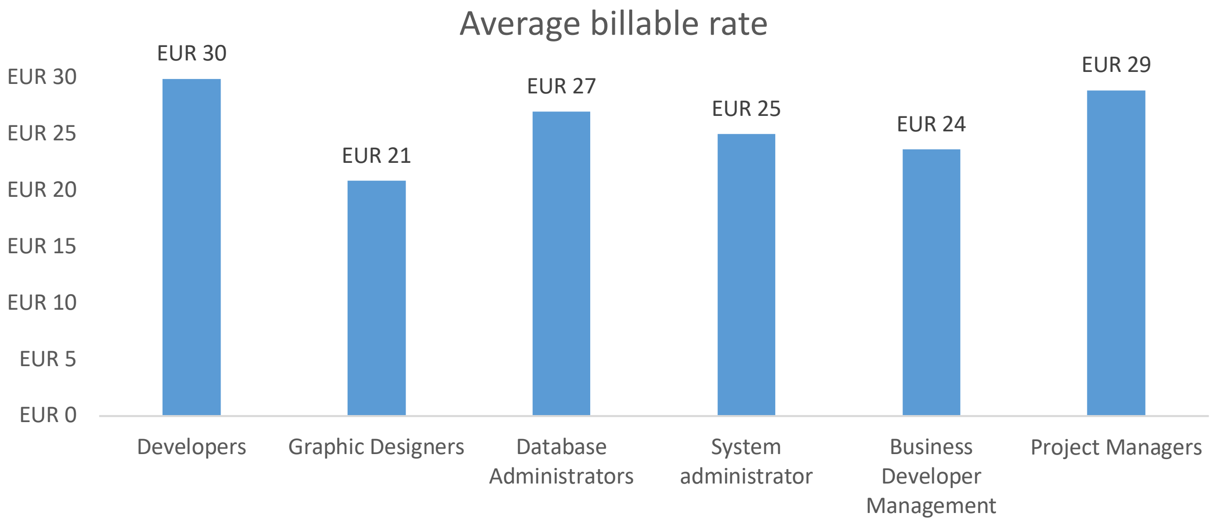

FIGURE 23: AVARAGE BILABLE RATE (N=8-19)

When asked about the need for skilled/qualified workers, a majority of 83% of companies declared that they face a deficit of skilled/qualified workers

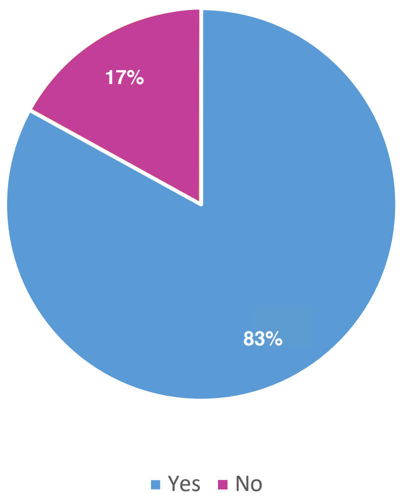

FIGURE 24: DOES YOUR COMPANY FACE A DEFICIT OF SKILLES/QUALIFIED WORKFORCE? (N=38)

Whereas in terms of ways how these companies cope with the deficit of the workers is by investing in training and certifications. The most popular investment is in-house training with an average of 5,200 EUR annually followed by other specific training. Investments are made also by External consultant-based training with an estimated 3,375 EUR annually, followed by Special certification programs with an estimated 3,250 EUR and Job shadowing with an estimated 2,750 EUR annually.

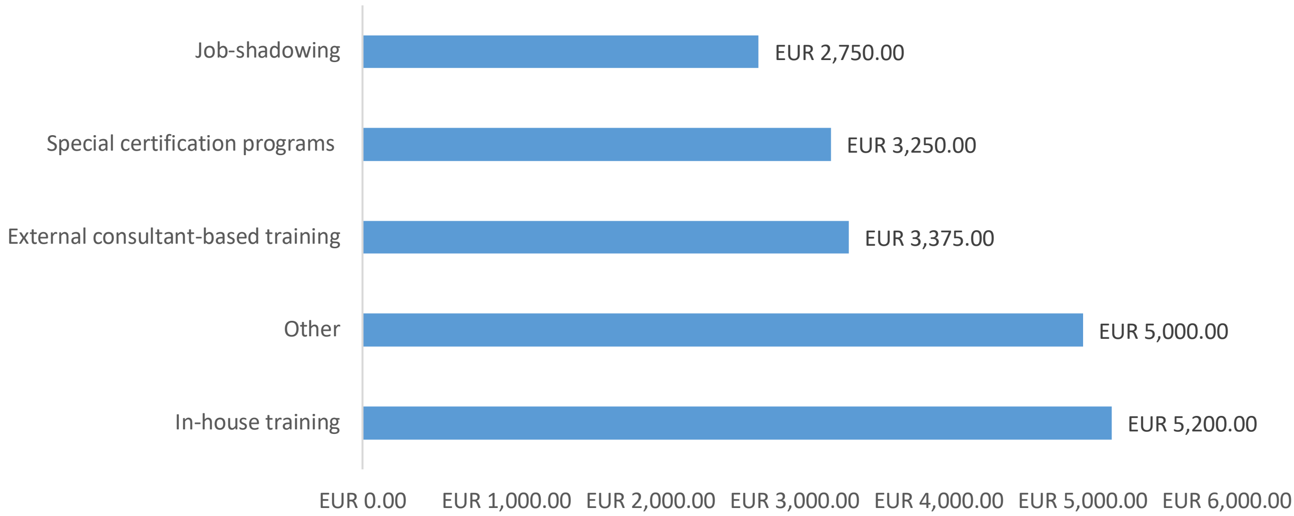

FIGURE 25: HOW DO THEY COPE WITH DEFICIT OF SKILLED/QUALITIFED WORKFORCE? (N=38)

We have asked companies to estimate changes in terms of number of employees of different profiles. Companies in general expect increases of number of employees of different duties, especially for developers and Business development managers and Project managers. More details are presented on the table below.

	-50%|-------	-25% Decrease	-10%-------|	±0%	+10%|-------	+25% Increase	+50%-------|
Developers		3%		9%	15%	52%	21%
Graphic Designers		4%		44%	41%	11%	-
Database Administrators		-	-	50%	38%	13%	-
System administrators		-	-	31%	42%	27%	-
Business Development Managers		-	-	25%	43%	29%	4%
Project Managers		-	-	23%	47%	23%	7%
Marketing / Sales		-	-	24%	48%	21%	7%
Administration		-	-	50%	43%	7%	
Others		-	-	47%	32%	16%	5%

TABLE 5: HOW TO YOU EXPECT YOUR NUMBER OF EMPLOYEES TO CHANGE? (N=33)

Furthermore, companies estimated changes in terms of salaries of employees of different profiles. Expectations are similar for salaries. Companies in general expect increases of salaries for people working in the IT sector. More details are presented on the table below.

	-50%|-------	-25% Decrease	-10%-------|	±0%	+10%|-------	+25%Increase	+50%-----|
Developers	-	-	-	12%	46%	33%	9%
Graphic Designers	-	-	-	44%	44%	11%	-
Database Administrators	-	-	-	36%	52%	8%	4%
System administrators	-	-	-	19%	65%	12%	4%
Business Development Managers	-	-	-	35%	39%	23%	4%
Project Managers	-	-	-	18%	54%	25%	4%
Marketing / Sales	-	-	-	35%	45%	21%	-
Administration	-	-	-	45%	55%	-	-
Others	-	-	-	62%	33%	5%	-

TABLE 6: HOW TO YOU EXPECT YOUR SALARIES OF EMPLOYEES TO CHANGE? (N=33

At the end we have posted an interesting question to the companies, where we asked them to express the factors that they believe can influence their business.

Opinions on the factors that might have the highest influence on their business are quite diverse and different amongst the companies interviewed for this research exercise. Some companies, namely 22% believe that government policy has a high influence on their business, on the other hand 13% of the companies believe that government has no influence at all. The HR market also seems to be an interesting factor, whereas 19% of the companies believe that HR market has a high influence on their business.

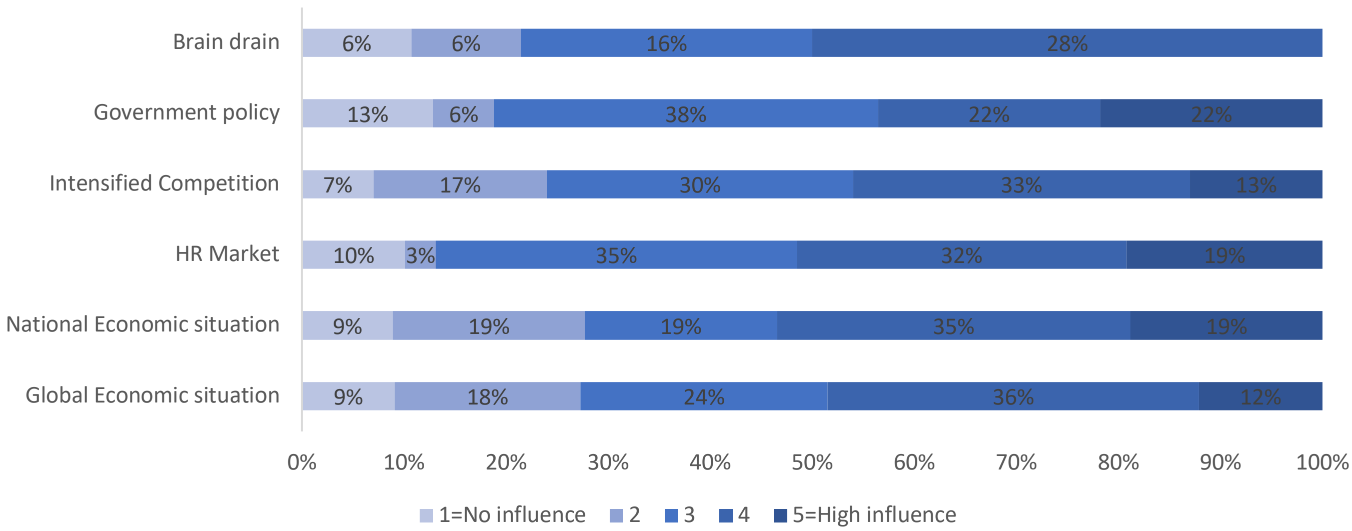

FIGURE 26: WHAT IS YOUR EXPECTED INFLUENCE OF THE FOLLOWING FACTORS IN THE DEVELOPMENT OF YOUR BUSINESS? (N=31)

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