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STIKK
KOSOVO ICT ASSOCIATION

KOSOVO IT BAROMETER

2025

Market Sizing, Export Capacity, Workforce Trends, and Sectoral
Challenges in the ICT Industry

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Executive Summary

The Kosovo IT Barometer 2025 provides an in-depth assessment of the ICT and creative services sector, capturing both its continued growth and the structural constraints that limit it. Conducted annually since 2014 by STIKK, the IT Barometer has become a trusted resource for policymakers, industry leaders, and international partners. This study is carried out under Activity 4.4 of the KSV/021 "Skills for Sustainable Jobs in Kosovo" project, funded by the Grand Duchy of Luxembourg and implemented by LuxDev, the Luxembourg Development Cooperation Agency, in partnership with STIKK. This edition examines developments across 2025 and includes a special focus on the awareness, readiness to engage, and perceived effectiveness of Dual Vocational Education and Training (Dual VET) in Kosovo's private ICT sector.

At a time when artificial intelligence is reshaping how digital work is produced, Kosovo's ICT industry stands out as one of the country's most dynamic growth engines. Nearly half of the companies surveyed were founded after 2020, reflecting the sector's entrepreneurial drive. Yet the overwhelming dominance of micro and small firms, close to nine in ten of the sample, highlights the structural challenge of scaling beyond early stages. Most companies remain concentrated in the Prishtinë region, with regional firms underrepresented, suggesting that opportunities outside the capital are still underdeveloped.

The comparison with the previous edition reveals both progress and pressure. Salaries have risen across every job function, and AI adoption has reached complete saturation, with no company in the sample now reporting that it does not use these tools. At the same time, recruitment has become measurably harder, the share of companies finding it easy to hire skilled staff has halved, while difficulty has broadened from a few technical specialisms into a general condition affecting security, design, and marketing roles alike.

Despite this progress, the sector's gains are unevenly distributed. Across almost every measure that permits a breakdown by company size, the smallest firms are the least connected, the least supported, and the least equipped to act on the opportunities the sector as a whole is capturing. Internationally, North America and the DACH region remain the key export markets. Overall, the sector shows rapid technological modernization and strong innovation potential, but growth is still limited by its small-scale structure, its dependence on passive client acquisition, and a talent pipeline that remains largely disconnected from the institutions meant to supply it.

Methodology

The study was based on a quantitative self-completion online survey (CAWI) conducted between 4 June and 7 August 2025. A working frame of 1,188 contacts was drawn from the Kosovo Business Registration Agency database after cleaning the previous edition's list; invitations were sent to 533 companies, of which 102 completed the questionnaire. Respondents were predominantly in leadership positions (81%), ensuring that findings largely reflect employer perspectives. Data was processed using NField and validated in SPSS, with strict confidentiality and quality standards. Limitations included survey dropout rates, the self-administered nature of responses, which limited verification of completion, and variable non-response across questions, most notably on revenue.

Key Findings

Profile and Characteristics of ICT Companies

The sector is dominated by young, micro-sized, technology-oriented companies, mostly founded after 2020 and concentrated in the Prishtinë region. More than half hold no formal certification, limiting readiness for international markets. Women hold a substantial share of positions across the sector, yet only 12% of the individuals who represented their companies in this survey were women.

Adopted Technologies and Provided Services

Companies mainly offer software and web development and IT support, while advanced fields such as cybersecurity and data analytics are less common though no longer marginal. React is used across the sector regardless of the language a company works in, functioning as a common front-end layer, while backend languages pair closely with their conventional frameworks. Cloud infrastructure is distributed across AWS, Azure, and Google Cloud, with Azure concentrated among companies working in the Microsoft stack. AI use is universal, concentrated in code generation, debugging, and documentation.

Workforce Dynamics, Skills, and Talent Readiness

Nine in ten companies encountered difficulty hiring skilled staff, and the constraint bears hardest on larger employers, cited by 70% of medium-sized companies against 29% of micro-enterprises. Salaries rose across every function, yet investment in developing existing staff fell, with training expenditure concentrated at the lowest levels among the smallest firms. Nearly half of companies report that AI has already reduced their need for certain roles, with the effect falling overwhelmingly on intern and junior positions.

International Orientation, Revenue Patterns and Market Reach

Three-quarters of companies exported during 2025, with export capacity rising steadily with company size. The United States is the leading destination, followed by Germany, Switzerland, and the United Kingdom. Seven in ten companies serve technology clients, indicating that much of the sector operates as a subcontractor, while the higher-value industries requiring domain expertise are served principally by firms that have reached scale.

Challenges and Future Outlook

Winning new clients was among the most frequently named challenges and is the one constraint that does not ease as companies grow. A third of companies experienced a cybersecurity incident, though few regard security as a significant business problem. Some 93% expect AI and machine learning to be the most important technology of the next five years, the highest level of agreement recorded on any question, yet opinion divides four ways on what it will do to employment.

Support and Collaboration

Engagement with educational institutions and government programs remains low, with only 30% collaborating with education and 15% receiving institutional support, almost entirely in the form of grants. Awareness of Dual VET stands at 39% overall but varies sharply by size, from 22% among

micro-enterprises to 80% among medium-sized companies. Among companies aware of the program, only 10% rule out participation.

Conclusions

The sector's achievements are real. Export penetration, wage growth, and the speed of AI adoption all place Kosovo's ICT industry ahead of the wider economy, and in some respects ahead of regional comparators.

Its constraints, however, share a common shape. At almost every point where the data allow a breakdown by company size, the same gradient appears, micro-enterprises export less, invest less in training, receive less institutional support, and are least likely to have heard of the programs designed to help them. The sector's difficulties are not uniform, and treating them as such risks directing support toward firms that already have it.

Three specific tensions define the year. Recruitment has become harder while internal development has weakened, leaving the sector without an answer to a shortage it cannot recruit its way out of. AI is reshaping entry-level work at precisely the moment the sector most needs to build experience internally. And client acquisition remains a difficulty that growth does not resolve, in a sector where six in ten companies depend on referrals to find work.

Recommendations

Reach the smallest firms directly. Dual VET outreach conducted through existing institutional networks will largely reach companies that already know about the program. Contact with micro-enterprises requires channels that do not presuppose an existing relationship, and program design that accommodates firms too small to host an apprentice alone.

Rebuild the entry level around what AI has not automated. Training provision should shift from producing graduates who can perform routine coding and documentation toward those able to direct, evaluate, and correct AI-generated output.

Strengthen routes to market alongside financial support. Companies point to networking opportunities and financial support in roughly equal measure, and market access is where provision is currently thinnest. Trade missions and structured buyer introductions would address a constraint reported across firms of every size.

Extend support beyond grants. Mechanisms requiring no application, such as tax incentives tied to training or apprenticeships, would reach firms that competitive grant processes systematically exclude.

Target training subsidy where the gap is. Support should compensate for foregone billable time as well as fees, and be directed at firms below ten employees, where investment is lowest.

Broaden the sector beyond one city and one leadership profile. Flexible working and regionally directed business development would widen the talent pool; leadership development and mentorship would address a gender imbalance that concerns advancement rather than entry.

Methodology

The overall purpose of the study was to analyze skills gaps and workforce trends in Kosovo's ICT sector through the annual Kosovo IT Barometer. This edition, implemented by STIKK under the KSV/021 – Skills for Sustainable Jobs in Kosovo project, funded by the Grand Duchy of Luxembourg and implemented by LuxDev, covers developments during 2025 and includes a dedicated focus on the awareness and perceived impact of Dual Vocational Education and Training (Dual VET) within the private ICT sector.

The objectives of the study were to assess key developments in Kosovo's ICT sector during 2025, with a focus on identifying business performance trends, workforce and skills demand, export capacity, and sectoral needs. In addition, the study aimed to evaluate the level of awareness of Dual VET among ICT companies, their readiness to engage with it, and their assessment of its likely effectiveness. Based on these findings, the study sought to generate evidence-based policy, training, and sector development recommendations to support skills development and the sustainable growth of the sector.

The research approach was quantitative survey – self completion interview, through the Computer Aided Web Interview (CAWI).

Data collection took place between 4 June and 7 August, spanning a total of 64 days.

The sample frame consisted of registered businesses engaged in ICT-related activities, as listed in the database of the Kosovo Business Registration Agency. The frame used in the previous edition, comprising 1,528 contacts, was reviewed and cleaned prior to fieldwork, businesses found to be no longer operating, and those that could not be reached through any available channel during the previous round, were removed. This produced a working frame of 1,188 contacts, consisting of phone numbers and email addresses.

Invitations containing the link to the questionnaire were sent to 533 businesses. Of these, 102 completed the questionnaire and 421 opened it without completing the interview. During follow-up calls to verify the delivery of the invitation, 103 successfully contacted respondents explicitly refused participation, while 277 did not answer or had no telephone number registered, and 331 had telephone numbers that were incorrect or unavailable. It is worth noting that 81 of the successfully contacted businesses reported that they were no longer active.

Ensuring the safety and confidentiality of the data provided by participating companies was a key priority of the study. To guarantee anonymity, no company names or contact details were collected during the interviews, meaning that responses could not be traced back to businesses. All collected data were securely stored on our servers under strict data protection protocols. Access to both the survey data and the contact list used for outreach was limited exclusively to STIKK and Kantar, safeguarding the privacy of companies and the integrity of the information shared.

The questionnaire included both core questions on the main research topics and additional questions on respondent and company profiles. On average, interviews lasted around 13 minutes. The content of the questionnaire focused on the range of services offered by companies, covering both technology and creative services, as well as workforce dynamics, AI usage and its impact on roles, market reach and revenue, sectoral challenges, forms of support and collaboration, awareness of the Dual VET program, and the role of government and institutional support.

Kantar Index Kosova carries out research according to internationally recognized quality standards. Kantar Index Kosova complies with ESOMAR International Code of Marketing and Social Research Conduct, to other quality guidelines adopted by ESOMAR, and to the Quality Standard of the Gallup International Association.

The software used for data processing was NField. Apart from managing the questionnaire and data processing, the program is capable of logic and skip patterns, time stamps for start and end of interview. The data was processed during the interview, since the interviews were conducted using online. The data, as submitted at the end of each interview, were reviewed on a daily basis by the Data Processing Manager and the Project Manager. The final data set was validated in SPSS for Windows version 26 software, in Index Kosova offices by the Data Processing Manager and the Project Manager assigned for this project.

Limitations and Challenges of Method

A key limitation of the anonymous self-completion approach was the inability to verify whether respondents who claimed to have completed the questionnaire actually did so. Some participants forgot to complete it after agreeing to the invitation, while reminder calls occasionally caused irritation, leading to refusal. Additionally, several respondents discontinued the questionnaire, citing its length or lack of time.

The survey records the technical and non-technical split of the workforce and its gender composition as separate figures, but does not capture the two jointly. A figure for women's share of technical roles specifically, which would be directly comparable to international measures of ICT specialists, cannot therefore be derived. Adding a gender breakdown within technical and non-technical positions would be a worthwhile addition to future editions.

Introduction

The Kosovo IT Barometer is the principal instrument for assessing workforce trends, export capacity, and sectoral challenges within the country's information and communication technology industry. Conducted annually by STIKK since 2014, it provides a consistent evidence base on how ICT companies operate, what they produce, and what constrains their growth. The 2026 edition covers developments during 2025 and is implemented under the KSV/021 – Skills for Sustainable Jobs in Kosovo project, funded by LuxDev, with a dedicated focus on the awareness and impact of Dual Vocational Education and Training (Dual VET) within the private ICT sector.

The objectives of this edition are threefold: to assess key developments in Kosovo's ICT sector during 2025, with particular attention to workforce trends, export capacity, and sectoral needs; to evaluate the level of awareness and the perceived impact of Dual VET among ICT companies; and, on the basis of these findings, to generate evidence-based policy and training recommendations supporting skills development and the sustainable growth of the sector.

The sector examined here occupies an unusual position in Kosovo's economy. It is young – the majority of companies surveyed were founded within the past decade – overwhelmingly composed of micro and small enterprises, and strongly oriented toward international markets. It offers wages above the national average and a degree of gender balance that the wider labor market does not achieve. At the same time, it operates under persistent constraints: a shortage of skilled labor that has tightened rather than eased, limited internal capacity for training and recruitment, and a concentration of activity in a single city that leaves regional ecosystems underdeveloped.

This edition arrives at a moment of particular consequence for the sector. Artificial intelligence, which the previous Barometer recorded as moving from niche adoption toward widespread use, has now reached every company in the sample. The question is no longer whether firms use these tools but how deeply, and what their adoption means for the role's companies need and the skills they recruit for. This edition therefore introduces a new line of enquiry into AI's effect on workforce composition – whether it has reduced the need for particular roles, which levels of seniority are affected, and how companies expect the relationship between automation and employment to develop over the coming five years. As the sector's talent pipeline is already under strain, how AI reshapes demand for that talent is a question with immediate practical weight.

The report also examines the Dual VET program from a different angle than its predecessor. Where the previous edition measured participation and the reasons for its absence, this edition focuses on awareness of the program, willingness to engage with it ahead of its September 2026 start, and expectations of its effectiveness. Given that structured practical training has been repeatedly identified as a means of closing the gap between what education produces and what employers require, the readiness of ICT companies to participate is directly relevant to whether that gap narrows.

Findings are presented across seven sections, covering respondent and company profiles; the services companies deliver and the technologies they rely on; workforce composition, recruitment, salaries, and the impact of AI on roles; market reach and revenue; the challenges companies face and how they view the years ahead; and their engagement with educational institutions, the Dual VET program, and government support.

By combining employer perspectives with sector-level analysis, this report aims to provide business leaders, policymakers, educators, and international partners with a grounded basis for decision-making. It records both the strengths of Kosovo's ICT sector and the structural gaps in talent, capacity, and institutional support that will determine whether its growth can be sustained.

Findings

Before turning to the substance of what Kosovo's ICT companies do, how they hire, and where they sell, it is worth establishing who is actually speaking in this report. The findings that follow are only as meaningful as the sample behind them, and the character of that sample – how old these companies are, where they operate, and who within them answered the questionnaire – shapes how every subsequent result should be read. This first section therefore introduces the participating companies and the individuals who responded on their behalf, providing the frame against which the rest of the analysis can be interpreted.

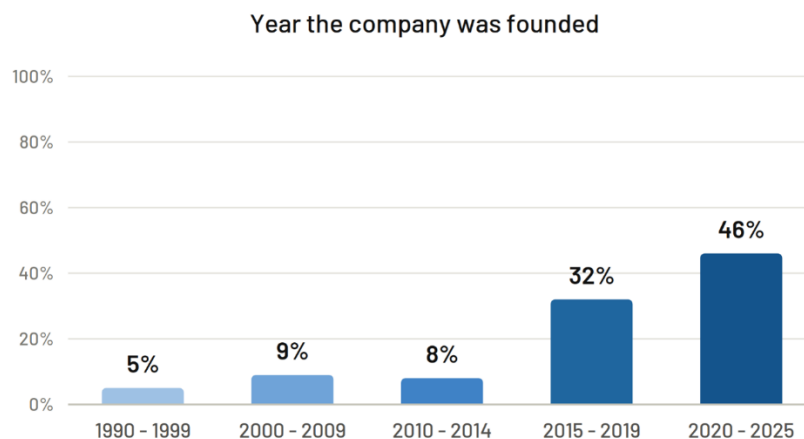
Section 1: Who Participated in the Survey

Kosovo's ICT sector, as captured by this year's Barometer, is composed predominantly of young companies concentrated in the capital.

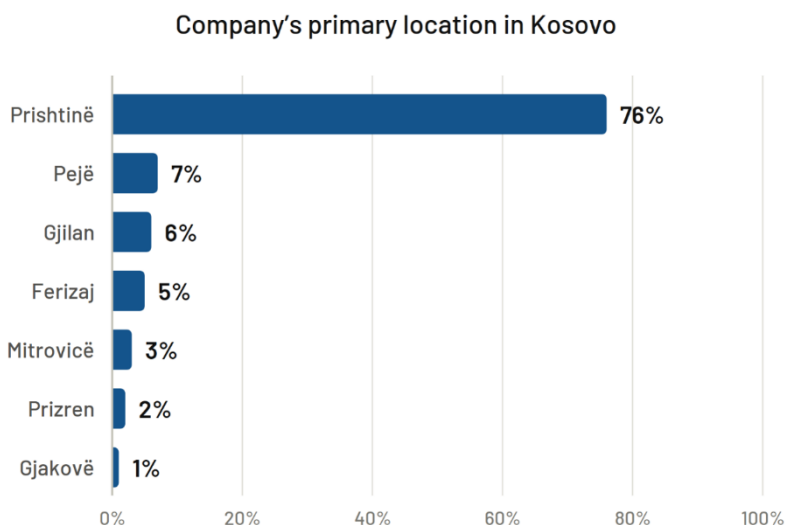
Nearly half of the surveyed companies (46%) were founded between 2020 and 2025, and a further 32% between 2015 and 2019. Taken together, close to eight in ten firms have been operating for a decade or less. Companies with longer histories form a small minority: 8% were established between 2010 and 2014, 9% between 2000 and 2009, and 5% trace their origins to the 1990s.

Geographically, the sector is heavily concentrated in Prishtina, where just over three-quarters of surveyed companies (76%) are based. This confirms the capital's role as the administrative and economic centre of the industry, and it means that the perspectives captured here are largely those of firms operating within the country's densest talent pool, client network, and infrastructure.

Beyond Prishtina, representation is thin and fragmented. Pejë accounts for 7% of companies, Gjilan for 6%, and Ferizaj for 5%, followed by Mitrovicë (3%), Prizren (2%), and Gjakovë (1%). No single municipality outside the capital accounts for more than a small fraction of the sector.



Graph 1: Q3a. In which year was your company founded? (n=102)

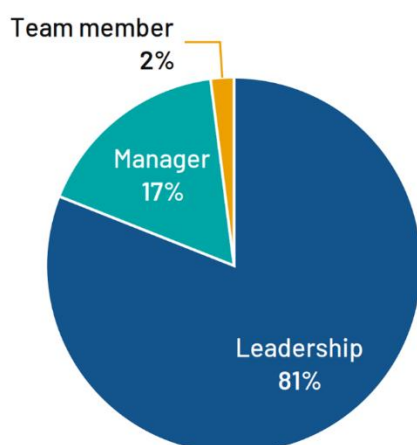


Graph 2: Q3b. Where is your company primarily based in Kosovo? (n=102)

The questionnaire was answered almost entirely by senior decision-makers within these companies. Eight in ten respondents (81%) hold leadership positions such as CEO, CTO, or CMO. A further 17% are managers, including project and HR managers, who contribute an operational perspective on how company strategy is carried out in practice. Only 2% of responses came from team members such as developers or designers.

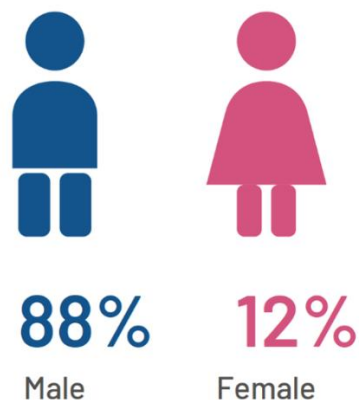
The respondent profile is strongly male, 88% of those who completed the survey were men and 12% women. As respondents were predominantly in leadership or managerial positions, this describes the gender composition of the individuals who represented their companies in the survey rather than of ICT leadership in Kosovo generally, since each company was represented by one person.

Respondent's role in the company



Graph 3: Q1. What is your role in the company? (n=102)

Gender of the respondent

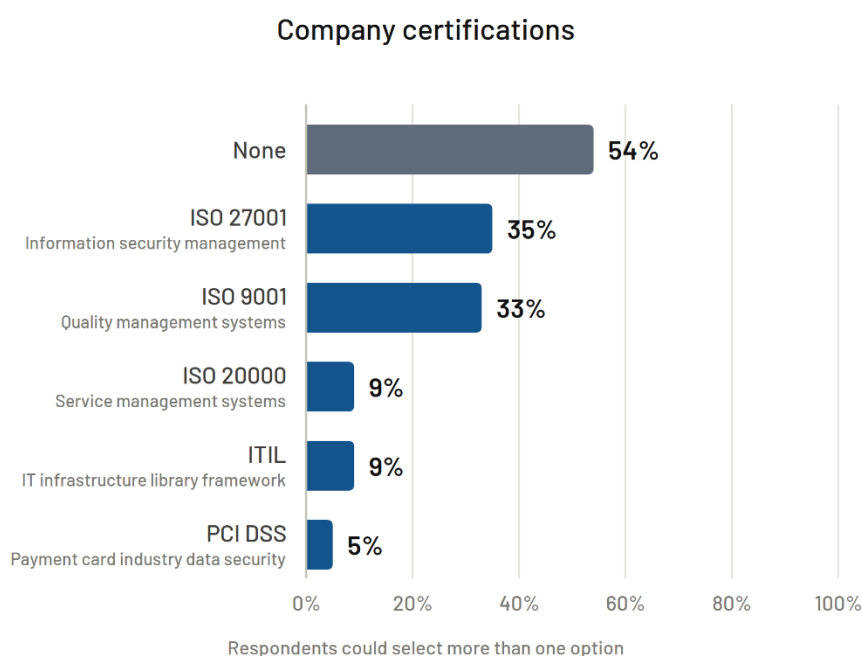


Graph 4: Q2. What is your gender? (n=102)

Formal certification remains the exception rather than the rule. Slightly more than half of the surveyed companies (54%) hold none of the listed standards, meaning 46% hold at least one. A majority of Kosovo's ICT firms therefore operate without externally verified quality, security, or service management frameworks.

Among companies that are certified, the emphasis falls clearly on information security and quality. ISO 27001, covering information security management systems, is the most widely held standard at 35%, followed closely by ISO 9001 for quality management systems at 33%. Adoption drops sharply beyond them, ISO 20000 for service management and the ITIL framework are each held by 9% of companies, while PCI DSS, the payment card industry data security standard, is reported by 5%.

This concentration is likely to reflect the demands companies encounter in practice, since ISO 27001 and ISO 9001 are the standards international clients most commonly set as a contracting condition, particularly where sensitive data is involved. The more specialized service management and payment security frameworks are requested in narrower circumstances, which is consistent with their limited uptake here.



Graph 5: Q4. Does your company hold any of the following certifications? (n=102)

Section 2: Main Focus Area and Services Offered

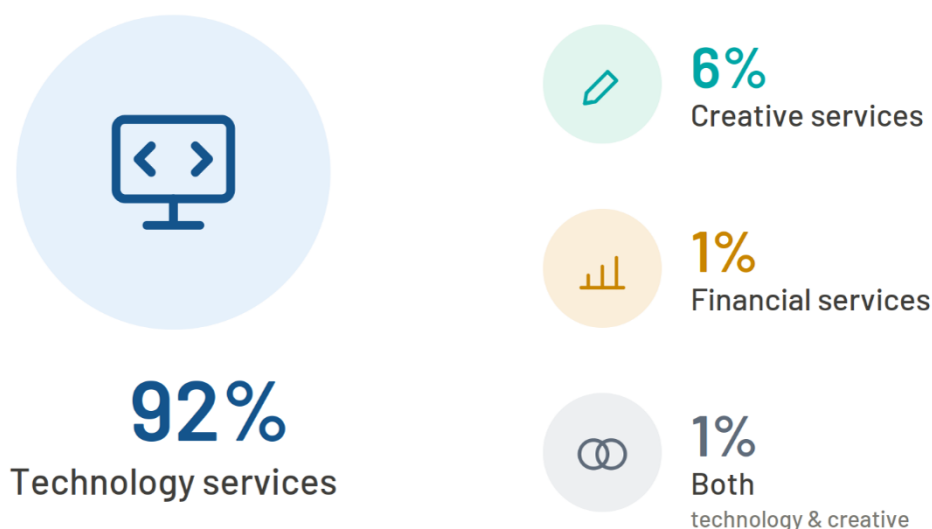
Having established who the participating companies are, the next question is what they actually do. This section examines the core business of Kosovo's ICT firms, first the broad area they identify as their main focus, and then the specific services they delivered over the course of the year. Because the

questionnaire routed respondents into different service questions depending on this initial choice, the distribution below also determines how much of the sample stands behind each of the results that follow.

The sector is overwhelmingly technology-oriented. More than nine in ten companies (92%) identify technology services as their main focus area, covering activities such as software development, IT support, web development, and telecommunications or network services. Creative services, marketing, design, and branding, account for 6% of companies, while financial services and firms combining technology and creative work each represent 1%.

This concentration has a direct bearing on how the rest of this report should be read. The findings on workforce composition, salaries, skills shortages, and export markets are, in practice, findings about technology companies, since these firms constitute the great majority of the sample. Where results are reported for creative services separately, they rest on a small number of companies and should be treated as indicative rather than representative of that segment as a whole.

Company's main focus area



Graph 6: Q5. What is your company's main focus area? (n=102)

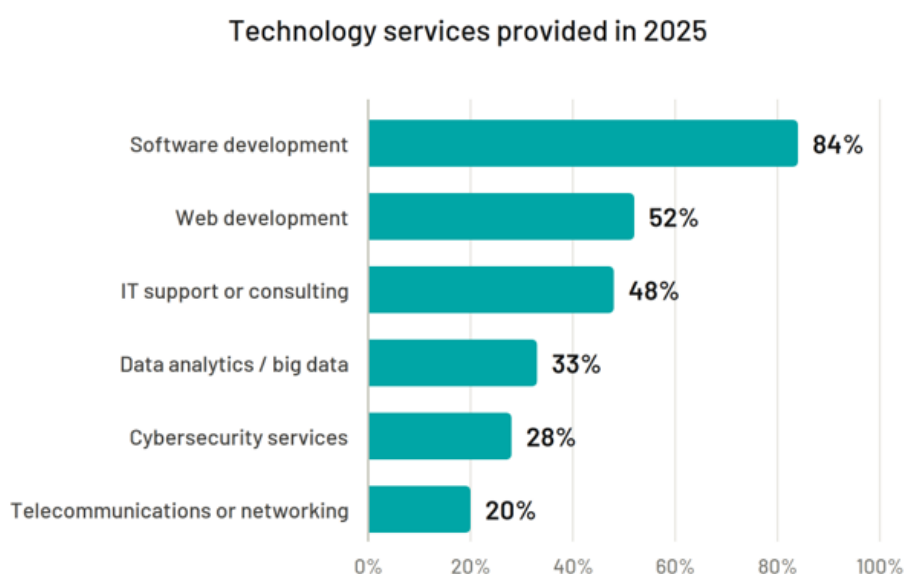
Technology Services as Company's Main Focus Area

Companies identifying technology as their main focus area were asked to specify the services they delivered during 2025. As this group represents the large majority of the sample, their service portfolios offer the clearest picture of what Kosovo's ICT sector actually produces.

Software development stands out decisively as the sector's core activity, provided by 84% of technology companies. Web development follows at 52%, and IT support or consulting at 48%. Together these three services form the foundation of the sector, the great majority of firms operate in at least one of them, and many combine them within a single portfolio.

The more specialized services occupy a smaller but no longer marginal position. Data analytics and big data services are provided by a third of companies (33%), cybersecurity services by 28%, and telecommunications or networking services by 20%. That roughly one in three technology firms now offers data analytics, and more than a quarter offer cybersecurity, indicates that these areas have moved beyond a small group of specialist providers and are being taken up more broadly across the sector.

The overall profile is one of firms concentrated in foundational digital services while extending into higher-specialization areas. Since most companies select more than one service, the pattern suggests portfolios built outward from a software or web development base. This breadth offers flexibility in responding to varied client demand, though it also means that capability in the more advanced areas may be distributed across many firms in modest quantities rather than concentrated in dedicated specialist providers.



Graph 7: Q6. What technology services did your company provide in 2025? (n=96)

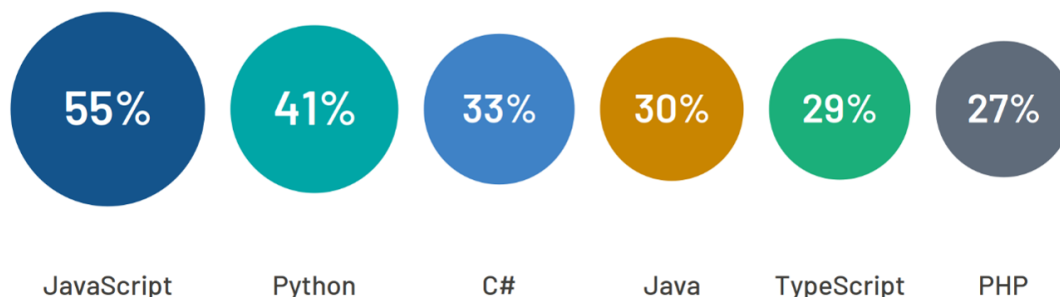
Respondents were asked which programming languages their companies relied on most during 2025, selecting up to three. JavaScript leads clearly at 55%, confirming its position as the sector's default language and reflecting the prominence of web and software development in company portfolios.

Python follows at 41%, placing it firmly in second position. Its strength is consistent with the growing share of companies offering data analytics and big data services, since Python is the standard toolkit for that work as well as for automation, scripting, and machine learning applications. C# (33%) and Java (30%) occupy the next tier, both associated with backend systems and enterprise application development, where they remain the established choices for larger or more structured projects.

TypeScript is reported by 29% of companies, and PHP by 27%. TypeScript's position close behind the leading backend languages is notable, as a typed extension of JavaScript, its adoption signals that firms working in the JavaScript ecosystem are increasingly opting for stricter, more maintainable approaches to code, typically a marker of larger codebases and longer-lived projects rather than one-off delivery work.

Taken as a whole, the distribution shows no single language monopolizing the sector. JavaScript is dominant but far from exclusive, and the spread across Python, C#, Java, TypeScript, and PHP indicates a workforce with reasonably diverse technical foundations. For companies, this breadth supports flexibility in taking on varied client requirements.

Programming languages used in 2025



Graph 8: Q7a. Which programming language did your company rely on most in 2025? (n=96)

Companies were also asked which frameworks and development technologies they relied on most in 2025, again selecting up to three. React emerges as the clear leader, used by 64% of technology companies, a share that exceeds any individual programming language and makes it the single most widely adopted technology in the sector. Its dominance follows directly from the prominence of JavaScript and TypeScript, and confirms that React has become the default choice for building user interfaces among Kosovo's ICT firms.

.NET Core ranks second at 39%, mirroring the position of C# among programming languages and pointing to a substantial segment of the sector working on enterprise-grade backend systems. Angular follows at 26%, providing an alternative front-end framework typically favored in larger, more structured applications.

The remaining frameworks occupy more specialized positions. Vue.js is used by 22% of companies, Laravel by 19%, and Express.js by 16%.

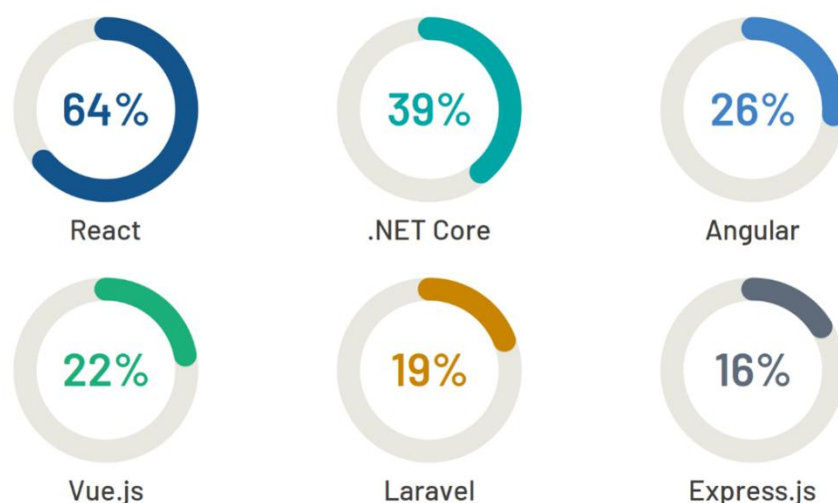
Aggregate figures alone cannot show how these technologies combine within individual companies. Examining language and framework choices together at company level reveals a pattern more uniform than the separate results suggest.

React is used consistently regardless of which language a company works in. Between 63% and 77% of companies naming any given language also use React, including 63% of those working with C#, a rate close to the sector average of 64%. Rather than belonging to a particular technology stack, React functions as the sector's common front-end layer.

Three language-framework pairings stand well above the sector baseline. Three-quarters of companies using C# also use .NET Core, against 39% of companies overall. Among PHP users, 54% work with Laravel, against 19% overall. And 41% of companies using Java also use Angular, against 26% overall. In each case the framework is the established companion to that language, and the pairing holds within individual firms rather than appearing only in the aggregate.

Beyond these, combinations are loose. Vue.js is used at broadly similar rates by companies working in every major language, and Express.js shows only a moderate tilt toward JavaScript and TypeScript. The sector is therefore less segmented by technology stack than the separate results imply. Most companies build on a shared front-end foundation and pair their backend language with its conventional framework, rather than committing to one distinct ecosystem over another.

Key frameworks, tools & technologies used in 2025



Graph 9: Q7b. Which frameworks tools or technologies did your company rely on most in 2025? (n=96)

Programming language vs. frameworks tools or technologies company rely on most

	React	.NET Core	Angular	Vue.js	Laravel	Express.js
JavaScript (n=53)	70%	36%	21%	23%	21%	21%
Python (n=39)	77%	36%	36%	23%	21%	8%
C# (n=32)	63%	75%	31%	16%	13%	13%
Java (n=29)	69%	38%	41%	17%	14%	7%
TypeScript (n=28)	71%	25%	25%	29%	25%	32%
PHP (n=26)	69%	39%	15%	23%	54%	23%

Row percentages showing framework use among companies naming each language; they do not sum to 100% in either direction.

Table 1: Q7a. Programming languages and frameworks used in 2025

Cloud infrastructure in Kosovo's ICT sector is concentrated among the three global hyperscale providers. Amazon Web Services leads at 53%, followed closely by Microsoft Azure at 48% and Google Cloud Platform at 40%. The margins separating them are narrow, indicating that no single provider has

established decisive dominance and that companies are distributed fairly evenly across all three ecosystems.

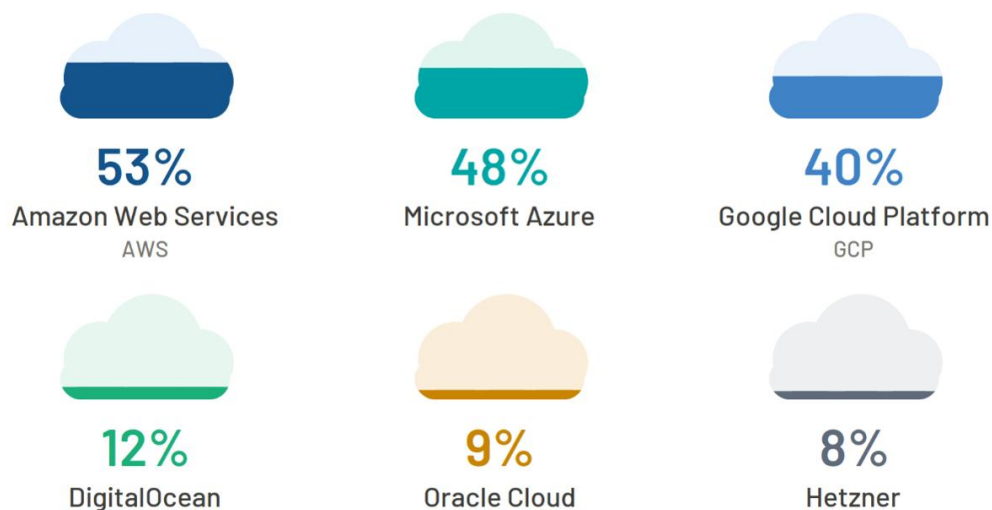
Beyond these, adoption falls away sharply. DigitalOcean is used by 12% of companies, Oracle Cloud by 9%, and Hetzner by 8%. These platforms typically serve different needs, simpler deployment models and lower running costs, and their more modest shares suggest they function as secondary or cost-driven options rather than as primary infrastructure for most firms.

Two features of this distribution are worth drawing out. First, the closeness of the top three shares, combined with the multiple-response format, indicates that many companies work across more than one major platform rather than committing exclusively to a single provider. This is consistent with an export-oriented sector in which infrastructure choices are often dictated by client requirements rather than internal preference, and it implies that cloud engineers in Kosovo are frequently expected to be competent in several environments at once.

Second, the choice of cloud platform is closely linked to the development stack a company works in. Among companies using .NET Core, 70% report Microsoft Azure, well above the 48% sector average, and the only case in which Azure outranks AWS within a technology group. Companies using React, by contrast, report Azure at 49%, in line with the sector as a whole. The pattern indicates that firms working in the Microsoft development ecosystem extend that choice to their infrastructure, rather than selecting cloud providers independently of the technologies they build with.

A weaker pattern runs in the opposite direction. Companies using Laravel or Express.js report DigitalOcean at 33% and 27% respectively, against 12% across the sector, suggesting that firms working in PHP and server-side JavaScript are more likely to use lower-cost infrastructure alternatives.

Primary cloud tools & technologies used in 2025



Graph 10: Q7c. Which cloud tools or technologies did your company rely on most in 2025? (n=96)

Frameworks tools or technologies vs. cloud tools or technologies company rely on most

	Amazon Web Services	Microsoft Azure	Google Cloud Platform	DigitalOcean	Oracle Cloud	Hetzner
React (n=61)	66%	49%	46%	12%	13%	5%
.NET Core (n=37)	49%	70%	38%	8%	14%	8%
Angular (n=25)	60%	64%	44%	12%	8%	4%
Vue.js (n=21)	52%	52%	43%	14%	10%	14%
Laravel (n=18)	67%	39%	50%	33%	17%	6%
Express.js (n=15)	67%	33%	40%	27%	7%	13%

Row percentages showing cloud platform use among companies naming each framework; they do not sum to 100% in either direction.

Table 2: Q7b. Frameworks and cloud platforms used in 2025

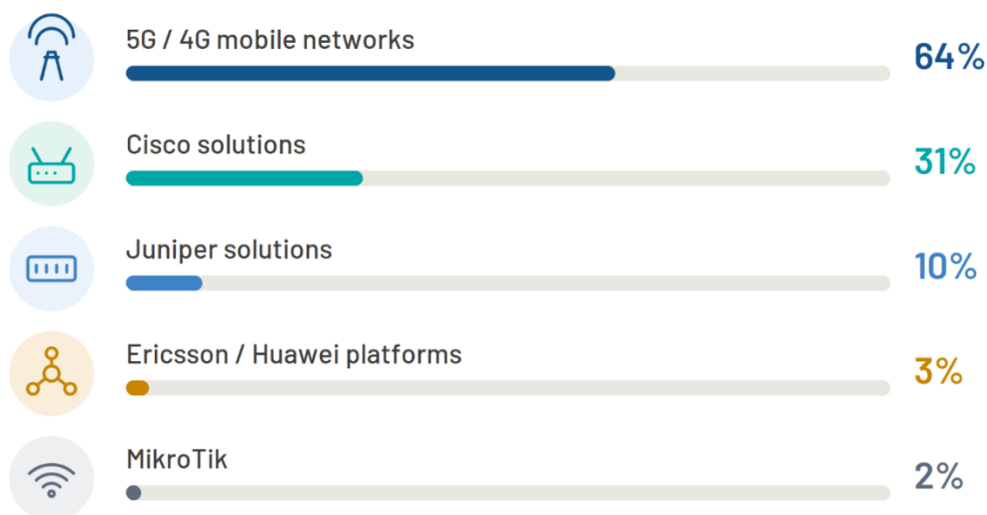
The final technology question in this section addressed networking and telecommunications. Here the results differ in character from the preceding ones, since they capture connectivity infrastructure that companies depend on as much as technologies they actively build with.

Mobile networks are the most widely reported at 64%, with 5G and 4G connectivity underpinning day-to-day operations across the sector. Cisco solutions follow at 31%, reflecting the continued position of enterprise-grade networking equipment among firms managing their own infrastructure or delivering network services to clients. Juniper solutions are reported by 10%, while Ericsson and Huawei platforms (3%) and MikroTik (2%) remain marginal.

A notable feature of these results is that 15% of companies answered "don't know" or "not applicable", a larger share than any option other than mobile networks and Cisco. This is itself informative. It indicates that for roughly one company in six, networking and telecommunications technology is not a meaningful part of how the business operates, and the respondent had no basis on which to answer. Read alongside the finding that only 20% of companies deliver telecommunications or networking services, the picture is consistent, these technologies are peripheral to most firms in the sample.

The distribution therefore reinforces a point evident throughout this section. Kosovo's ICT sector is predominantly a software sector, and networking and telecommunications appear here mainly as the connectivity layer on which software work depends rather than as a specialization in their own right. The concentration on mobile networks and Cisco equipment reflects standard business infrastructure needs, while deeper telecommunications capability remains confined to a small group of specialist providers.

Primary networking & telecom tools and technologies used in 2025



Graph 11: Q7d. Which Networking/Telecom tools or technologies did your company rely on most in 2025? (n=96)

Creative Services as Company's Main Focus Area

The second branch of the survey covered companies whose primary business is creative rather than technical work. This group is very small, seven companies in total, comprising the six that identified creative services as their main focus area and one that reported working across both technology and creative services. The findings below therefore describe what these particular firms do rather than the creative segment of Kosovo's ICT sector as a whole, and they are reported as counts rather than percentages to avoid implying a precision the base cannot support.

Digital marketing, covering activities such as search engine optimization and online advertising, was provided by all seven companies. Design or branding work was offered by six of the seven, and social media management and content creation by five each.

What stands out is not the ranking but the overlap. Every company in this group delivers at least three of the four service types, and most deliver all four. Rather than specializing in a single discipline, these firms operate as full-service providers, combining strategy, visual work, channel management, and content production within a single offering.

This breadth is a reasonable response to the market these companies serve. With a small domestic client base, few Kosovar businesses require a dedicated branding agency or a standalone content studio; demand is more often for a single partner able to handle an entire campaign. For the firms themselves, the model spreads a limited headcount across a wide range of skills, a workable arrangement at small scale, though one that offers little room for the deep specialization that typically supports higher-value or export-oriented work.

Creative services provided in 2025



Graph 12: Q9. What creative services did your company provide in 2025? (*n=7)

When it comes to marketing approach, five of the seven companies identified inbound marketing, search engine optimization, content marketing, social media, and analytics, as their primary strategy, while two reported relying mainly on outbound methods such as paid advertising and cold outreach.

The lean toward inbound approaches are consistent with the service profile described earlier. Firms already delivering social media management, content creation, and design are, in effect, applying the same capabilities to their own marketing, the work that attracts clients organically is the work they sell. Inbound methods also demand time and content rather than advertising budget, which suits companies operating at small scale.

Because this question determined routing, the two follow-up questions on specific platforms rest on even smaller bases, five companies for inbound tools and two for outbound. Results from those questions indicate the tools in use among a handful of firms and should not be read as a picture of platform adoption across the creative segment.

Primary marketing strategy used in 2025



Graph 13: Q10. What type of marketing strategy did your company primarily use in 2025? (*n=7)

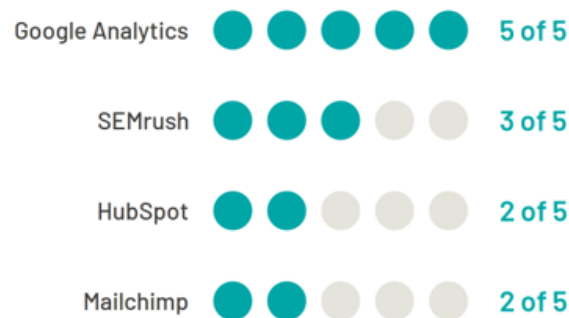
Among the five companies pursuing an inbound strategy, Google Analytics was used by all of them, making it the one universal tool in this group. SEMrush followed with three users, while HubSpot and Mailchimp were each reported by two.

The tools divide neatly by function. Google Analytics and SEMrush cover measurement and search visibility, understanding how audiences arrive and how content performs in search results. HubSpot and Mailchimp handle the other side of inbound work, capturing contacts and maintaining direct communication through customer relationship management and email campaigns.

That every company uses the measurement layer while fewer than half use the automation layer points to where these firms concentrate their effort. Inbound marketing here appears to rest primarily on producing content and tracking its performance, rather than on structured systems for nurturing leads over time. This is a natural pattern at small scale, where analytics tools are free or inexpensive and the volume of contacts rarely justifies dedicated automation platforms, but it does mark a limit on how far the approach can be extended without further investment.

With a base of five companies, these results describe the toolkits of a handful of firms and cannot be generalized to inbound marketing practice across the sector.

Primary inbound marketing platforms & tools used in 2025



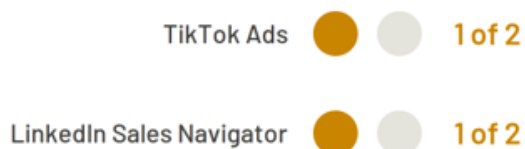
Graph 14: Q10a. Which inbound platforms or tools did your company use most in 2025? (*n=5)

Only two companies reported outbound marketing as their primary approach, and their platform choices were entirely separate, one used TikTok Ads, the other LinkedIn Sales Navigator.

At this base no pattern can be identified, and the results are reported for completeness rather than as evidence of practice in the sector. What can be observed is that the two platforms sit at opposite ends of the outbound spectrum. TikTok Ads is a paid channel for reaching broad consumer audiences through short-form video, while LinkedIn Sales Navigator is a prospecting tool for identifying and approaching individual business contacts. The two reflect fundamentally different client bases, one consumer-facing, the other business-to-business.

Notably absent are Google Ads and Meta Ads, the platforms that typically account for the bulk of paid digital advertising. Their absence here should not be read as evidence of low use in Kosovo's creative sector, given that only two companies answered this question.

Primary outbound & paid advertising platforms used in 2025



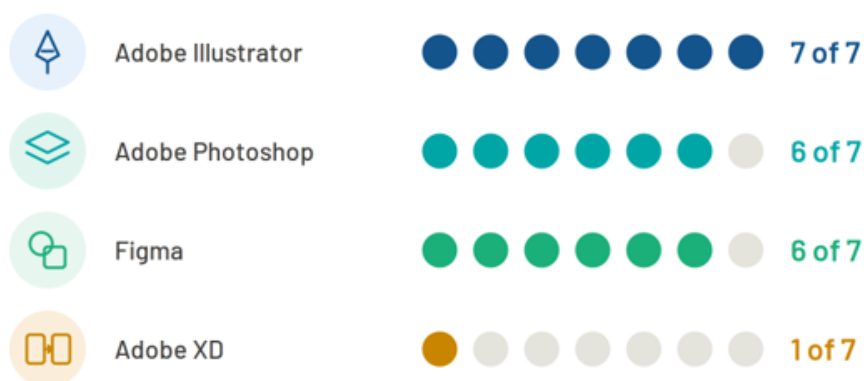
Graph 15: Q10b. Which outbound or paid advertising platforms did your company use most in 2025? (*n=2)

Returning to the full group of seven, design software shows a settled and narrow toolkit. Adobe Illustrator was used by every company, while Adobe Photoshop and Figma were each used by six of the seven. Adobe XD was reported by a single company.

Two of the three leading tools are Adobe products built for vector illustration and image editing – the established foundation of print, brand, and graphic work, while Figma covers interface and collaborative design. Between them these three cover the range of work these companies described earlier, and the near-universal use of all three suggests firms are not choosing between them but running them side by side, moving between tools as a project requires.

Two absences are worth noting. Adobe XD, which registered a single mention, has been effectively displaced by Figma in the interface design space, and the pattern here reflects that wider shift. More striking is that no company reported using Canva, Sketch, Blender, InVision, or CorelDRAW. Canva in particular is a widely adopted tool for quick, template-based production, and its complete absence indicates that these firms position themselves as professional design providers working with full-featured software rather than as producers of rapid, low-cost output.

Primary design software used in 2025



Graph 16: Q10c. Which design software did your company use most in 2025? (*n=7)

Social media use follows a similar pattern of concentration. Instagram and LinkedIn were each used by six of the seven companies, followed by Facebook with five. Twitter/X and TikTok were each reported by a single company.

The three leading channels serve distinct purposes, and their near-universal use points to firms operating across separate audiences at once. Instagram supports visual portfolio work and consumer-facing campaigns; LinkedIn addresses business clients and professional networking; Facebook remains the broadest-reach platform in the Kosovar market and the principal channel for local advertising. A creative firm running all three is covering client acquisition, campaign delivery, and its own visibility through different routes.

The minimal presence of TikTok is the more notable finding. Despite its scale as an advertising platform and its prominence in short-form video, only one company reported using it. Combined with the low uptake of Twitter/X, this suggests these firms concentrate on established channels where their client base is already active, rather than on newer platforms. Whether this reflects client demand or a gap in capability cannot be determined from the survey alone, though it is consistent with the earlier finding that content creation, including video, is among the less commonly offered creative services.

Primary social media channels used in 2025



Graph 17: Q10d. Which social media channels did your company use most in 2025? (*n=7)

AI Tools Usage

Artificial intelligence has spread through the companies surveyed faster than any technology recorded in previous editions of this Barometer, and the results here mark a point of saturation.

Every company surveyed used AI tools during 2025. More than three-quarters (78%) reported using them frequently, and the remaining 22% occasionally. No surveyed company reported non-use.

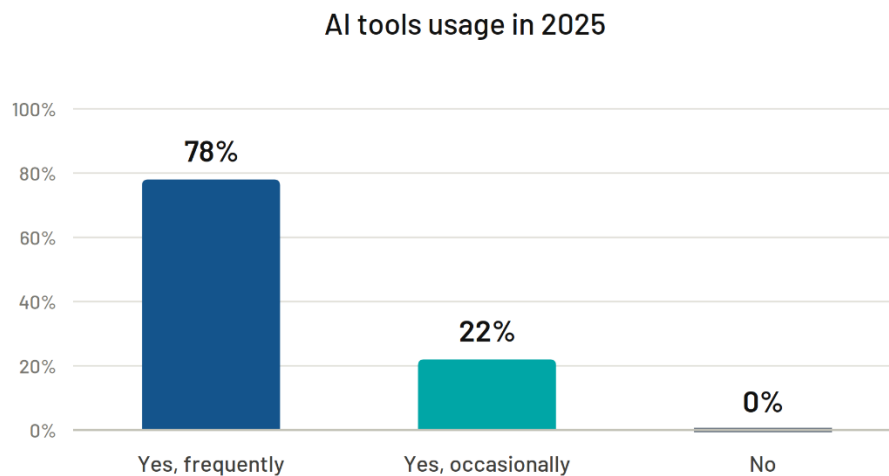
In the previous edition, close to one company in ten reported no AI use, at 8% among technology companies and 13% among creative companies¹. Among the 102 companies responding in 2025, that

¹ Kosovo ICT Association (STIKK), *Kosovo IT Barometer 2023-2024*, Prishtina, November 2025, Graph 13 (Technology Services) and Graph 18 (Creative Services). Study conducted by Kantar with the support of the "Skills for sustainable jobs in Kosovo" project, funded by the Grand Duchy of Luxembourg and implemented by LuxDev. In the 2023-2024 edition this question was asked separately of technology and

category is empty. Given the differences in routing between the two editions, this cannot be read as a precise measure of change across the sector, but the direction is unambiguous, a group of non-adopters that was visible two years ago did not appear in this year's sample at all.

This is a categorical result, and it is worth stating plainly what it does and does not mean. It does not mean that AI is deeply embedded in every company's operations: occasional use covers a wide range, from a developer consulting a coding assistant to a manager drafting correspondence. What it does mean is that among the companies surveyed, the question of whether to adopt AI is settled. No meaningful group of non-adopters appeared in this sample, and the relevant question has shifted from adoption to depth and purpose of use.

The absence of non-users in this sample also removes a comparison that shaped the previous edition, where AI adoption could be examined as a differentiator between companies. In 2025 it no longer distinguishes firms from one another, and any competitive difference now lies in how extensively and how skillfully these tools are applied.



Graph 18: Q11. Did your company use AI tools (e.g., Claude, Copilot, Canva AI, ChatGPT) in 2025? (n=102)

Companies using AI tools were asked what they used them for, selecting all applicable purposes across four domains. Since every company reported some AI use, these results describe the whole sample. A small number of respondents (7%) answered that they did not know or were unsure of the purposes for which AI was used in their company, a residual group not shown in the chart below, though the percentages that follow are calculated on all 102 companies.

Software development is where AI has taken hold most firmly. Code generation and assistance is the single most common application in the entire survey, reported by 81% of companies, followed by debugging and code review at 74%. Technical documentation (61%) and software testing and quality assurance (53%) complete a picture in which AI has been absorbed into every stage of the

creative services companies; no combined sector figure was published. The 2025 edition asks it of all companies. Figures are therefore indicative rather than directly comparable.

development cycle, writing, reviewing, documenting, and testing. For a sector built predominantly on software development, this is adoption at the core of the business rather than at its margins.

Content and creativity form the second cluster. Content creation is used by 70% of companies and brainstorming and idea generation by 61%, while summarization follows at 46%. These are general-purpose applications that require no specialist tooling, which explains their reach across a sample composed overwhelmingly of technology firms. Image and graphic generation (38%) and video or audio creation (11%) are considerably less common, indicating that AI use in this domain is largely text-based.

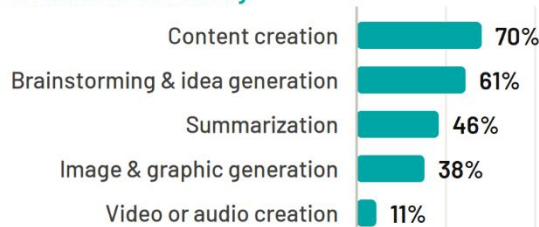
In business operations, data analysis and reporting stands out at 60%, a rate approaching the leading development uses and well above the other applications in its group. Human resources and recruitment (36%), internal training and knowledge management (26%), and financial analysis and forecasting (24%) trail well behind, suggesting AI has been applied to analytical work more readily than to administrative or financial processes.

Marketing and sales show the most even and the lowest distribution of any domain, with market research and analysis (40%), marketing and advertising copywriting (38%), and SEO (37%) clustered closely, followed by customer service and support (28%) and lead generation and sales support (24%). Given that only a small number of companies operate primarily in creative services, these figures largely reflect technology firms applying AI to their own marketing rather than delivering AI-supported marketing to clients.

Taken together, the results show adoption concentrated where the sector's core work lies. AI is most heavily used in software engineering and in general-purpose text and analysis tasks, and least used in specialized media production and in back-office functions. With companies selecting an average of more than eight purposes each, the pattern is not one of narrow experimentation but of tools applied broadly across multiple areas of the business simultaneously.

Purposes of AI tool usage in 2025

Content & creativity



Software development & IT



Marketing & sales



Business operations & strategy



Graph 19: Q11a. For which of the following purposes did your company use AI tools? (n=102)

Section 4: Workforce Profile and Dynamics

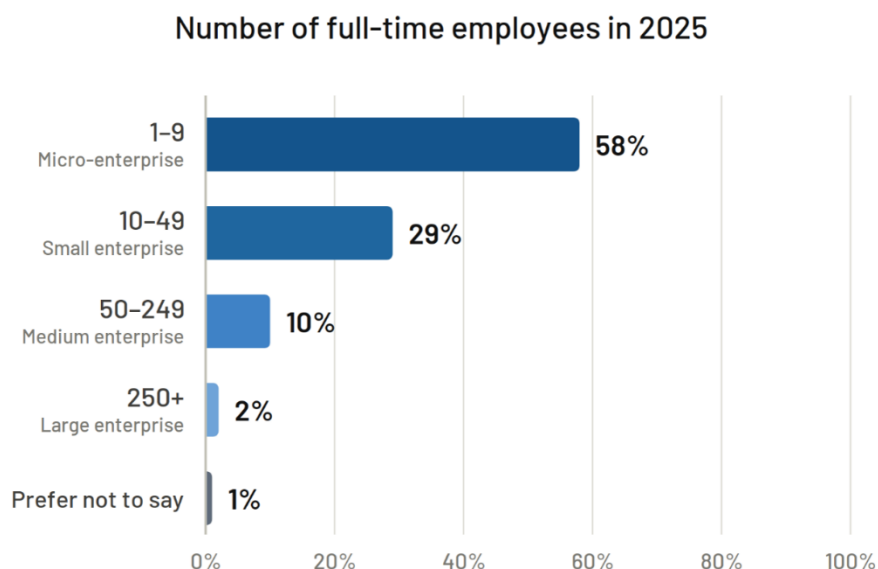
People are the principal asset of Kosovo's ICT sector, and the questions in this section examine that asset from four angles. It begins with the shape of the workforce; how many people companies employ and how those employees divide between technical and supporting roles. It then turns to how companies acquire and retain talent, covering recruitment difficulties and the skills that prove hardest to find, followed by what companies pay and what they invest in developing their staff. It closes with the question that has become unavoidable in workforce planning, how the adoption of AI is beginning to reshape the roles companies need. Together these results describe not only the current composition of the sector's workforce but the pressures acting on it.

Headcount & Staff Composition

Kosovo's ICT sector is built on small companies. Nearly six in ten (58%) employ between one and nine full-time staff, placing them in the micro-enterprise category, and a further 29% employ between ten and forty-nine. Taken together, almost nine in ten companies employ fewer than fifty people. Medium-sized enterprises of 50 to 249 employees account for 10% of the sample, and large enterprises of 250 or more for 2%. One company preferred not to disclose its headcount.

The size profile also connects directly to the founding pattern described earlier. With close to eight in ten companies established within the past decade, most firms in the sample have not yet had time

to scale, and the small headcounts reported here are consistent with a sector still in its growth phase rather than one that has stalled.



Graph 20: Q12. How many full-time employees did your company have in 2025? (n=102)

When company size is examined by main focus area, the difference between the two branches is clear. Technology companies are distributed across the full range of sizes, 56% are micro-enterprises, 31% small, 11% medium, and 2% large. Creative services companies cluster entirely at the smaller end, with five of the six operating as micro-enterprises and one as a small enterprise. No creative company employs more than forty-nine people. Two companies are not shown in the table: one in financial services and one reporting both technology and creative focus areas. Each represents a single case, too few to form a category, and both are micro-enterprises. A third company, in technology services, did not disclose its headcount. Results for creative services rest on six companies and should be read as indicative rather than representative.

The contrast reflects the different economics of the two activities. Technology firms delivering software development or IT services can win contracts that require sustained teams over long periods, creating a route to scale. Creative work is more often project-based and shorter in cycle, and the full-service model described earlier, a handful of people covering strategy, design, content, and channel management, does not readily expand into a larger organization. Every medium and large enterprise in the sample is a technology company, which places the sector's entire capacity for large-scale delivery within a single branch of the industry.

Company size by main focus area

	Technology Services	Creative Services*
1-9 (Micro-enterprise)	56%	83%
10-49 (Small enterprise)	31%	17%
50-249 (Medium enterprise)	11%	0%
250 or more (Large enterprise)	2%	0%

*Low base

Table 3: Q12. Company size vs. Q5. Company's main focus area (n=100)

Across the companies reporting headcount by gender, women make up 37% of the ICT workforce and men 63%. This is a general picture drawn from those companies that answered the question on gender distribution, rather than a complete count of the sector's workforce. It also includes the two companies excluded from the focus-area analysis, one in financial services and one reporting both technology and creative focus areas, both of which reported male employees only.

European comparators offer some context, though the figures are not directly equivalent. Eurostat reports that women accounted for 19.5% of ICT specialists in employment across the EU in 2025 and men for 80.5%², with the share of women having risen by 3 percentage points since 2015. The lowest shares were recorded in Czechia (12.9%), Hungary (15.0%), and Slovakia (15.5%), and the highest in Romania (27.8%), Latvia (25.9%), and Bulgaria (25.0%). In North Macedonia, the nearest regional comparator, women accounted for 31.7% of ICT specialists³.

These figures measure a different population from the one recorded here. Eurostat's category covers ICT specialists by occupation across the whole economy, whereas the 37% reported above covers all employees of ICT companies, including administrative, financial, and commercial roles in which women are generally better represented. A like-for-like figure for Kosovo would be lower, and the comparison should therefore be read as indicating that women's presence in Kosovo's ICT companies is not low by regional standards, rather than as a direct ranking against EU member states. The survey records the technical and non-technical split of the workforce and its gender composition separately, so a figure for women's share of technical roles specifically cannot be derived.

Against the background of Kosovo's wider labor market, however, the sector's position is notable. Women's participation nationally is among the lowest in Europe: only around one in four women (25.9%) participates in the labor market, compared with 60.6% of men, a gender gap of 34.7 percentage points, some 2.5 times the Western Balkan average and three times the EU average⁴. The employment rate among working-age women stands at 21.2%, against 55.9% for men, and women's unemployment rate of 18% is more than double the male rate of 7.7%⁵. The ICT sector thus achieves

² Eurostat, *ICT specialists in employment*, data for 2025. Available at: https://ec.europa.eu/eurostat/statistics-explained/index.php?title=ICT_specialists_in_employment [accessed August 2026].

³ Eurostat, *ICT specialists in employment*, 2025.

⁴ Riinvest Institute / UNFPA, *The Economic Cost of Women's Untapped Potential*, Prishtina, December 2025, p. 2. Underlying data: Kosovo Agency of Statistics.

⁵ Ibid., p. 3, drawing on Kosovo Agency of Statistics, Labour Force Survey.

a degree of gender balance that the national labor market as a whole does not, which positions it as one of the more accessible avenues into employment for women in Kosovo.

That said, the sector has not escaped the wider pattern of occupational segregation. Although women account for the majority of students in higher education in Kosovo, their presence in technical and high-demand fields such as ICT and engineering remains very limited, with women disproportionately concentrated in education, healthcare, and other sectors offering lower wages and weaker growth prospects⁶. The comparatively strong female presence recorded here should therefore be read as a sector performing well relative to a low national baseline, rather than as evidence that barriers to women's participation in technology have been resolved.

Gender distribution of the workforce in 2025



Graph 21: Q17. What was the gender distribution of your workforce in 2025? (n=102)

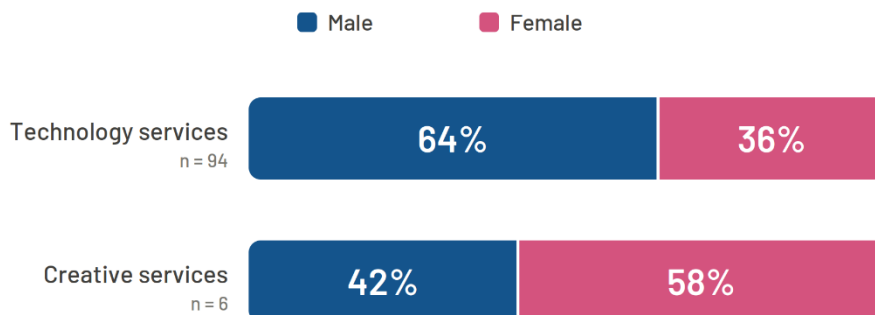
The picture differs by focus area. Within technology companies, women account for 36% of the workforce and men 64%, closely tracking the sector-wide figure, as would be expected given that technology firms employ the overwhelming majority of ICT staff in Kosovo. Among the six creative services companies, the balance reverses: women account for 58% of employees and men 42%. At that base the figure is indicative only, but it points in a clear direction.

This divergence connects to the salary findings reported later in this report. Creative, marketing, and client-facing functions are concentrated in the lowest pay bands, while specialized technical roles and leadership command a substantial premium. Women are best represented in the branch of the sector that pays least and least represented in the branch that pays most – a pattern consistent with the wider observation that women in Kosovo are disproportionately concentrated in lower-paying occupations.

Set against the finding that 88% of survey respondents, predominantly owners and senior managers, were men, the imbalance takes on a further dimension. Women hold more than a third of positions in technology companies and a majority in creative ones, yet remain a small minority among those who represented their companies in this survey. The sector's gender challenge is therefore twofold, representation within technical work, and progression into leadership across the sector as a whole.

⁶ Ibid., p. 6.

Gender split by company focus area



Graph 22: Q17. Gender distribution vs. Q5. Company's main focus area (n=100)

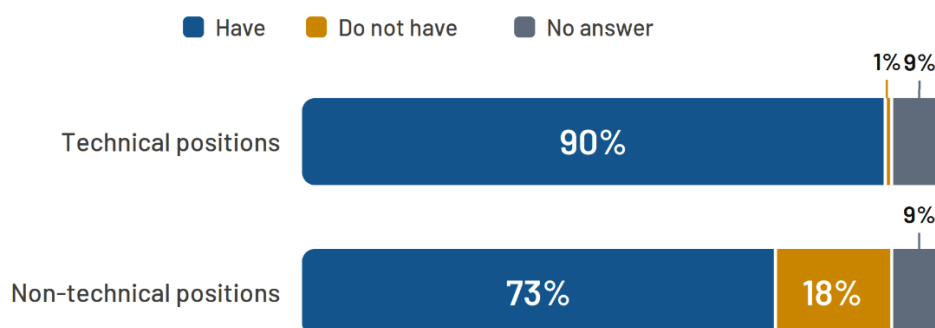
Turning to how those workforces are composed, the survey asked companies to divide their employees between technical and non-technical positions. Almost all companies, 90%, employ technical staff, which is unsurprising in a sector defined by that work, and only one company reported having none.

The more revealing figure concerns the other side of the organization. Just under three-quarters of companies (73%) employ non-technical staff, meaning that 18%, close to one company in five, operate with technical personnel only.

This structure follows from the size profile established earlier. With 58% of companies employing fewer than ten people, a specialized support function is rarely affordable, and every hire is weighed against its contribution to billable work. The result is organizations that are technically capable but administratively thin.

The consequences surface elsewhere in this report. Companies without an HR function must conduct recruitment on top of delivery work, which bears directly on the hiring difficulties examined in the next subsection.

Companies with technical and non-technical staff



Graph 23: Q13. How many of your employees were in technical vs. non-technical positions in 2025? (n=102)

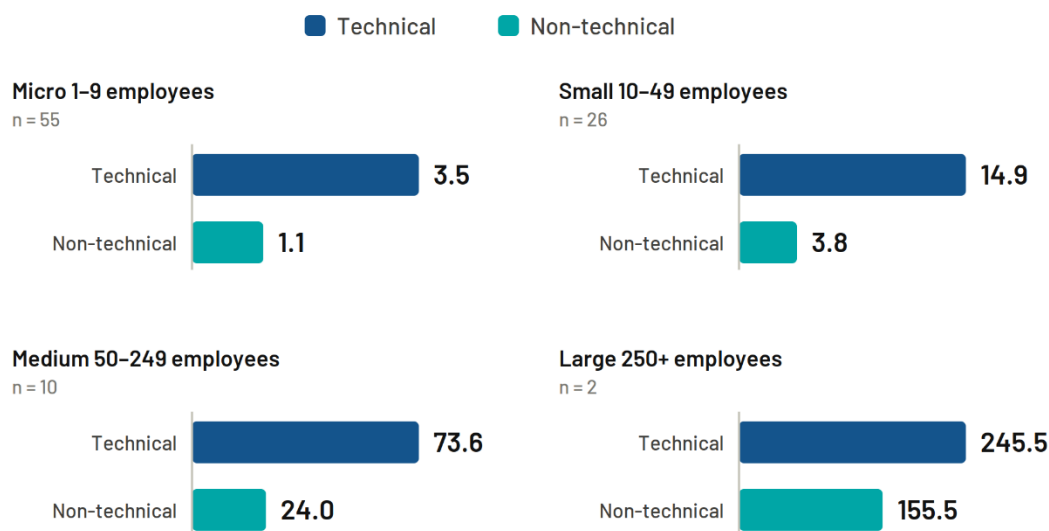
Average team composition by company size shows how these structures develop as firms grow. Micro-enterprises employ an average of 3.5 technical and 1.1 non-technical staff. Small companies average 14.9 technical and 3.8 non-technical, medium-sized companies 73.6 and 24, and the two large enterprises 245.5 and 155.5 respectively.

What matters here is not the absolute growth in headcount, which follows automatically from the size bands, but the ratio between the two categories. Across micro, small, and medium companies the balance is remarkably stable, technical staff outnumber non-technical by roughly three or four to one, with support functions accounting for between a fifth and a quarter of the workforce. Companies of ten to forty-nine employees are the leanest of all, with non-technical staff making up around a fifth of the team, these are firms adding delivery capacity faster than the structure to support it.

The pattern changes only at the top. In the two large enterprises the ratio narrows to roughly three technical staff for every two non-technical, with support functions accounting for close to two-fifths of the workforce. This is what an organization looks like once it requires dedicated finance, human resources, legal, administration, and management layers, functions that smaller firms either compress into the owner's role or do without. Given that only two companies fall into this category, the figures indicate the direction of change rather than establishing a reliable benchmark.

Read together with the previous finding, the picture is one of support capacity arriving late. Close to one company in five has no non-technical staff at all, and among those that do, such roles remain a small minority until a firm reaches substantial scale. Kosovo's ICT companies build technical capability first and organizational infrastructure considerably later.

Average number of staff per company, by company size



Each panel is scaled to its own maximum; companies declining to answer are excluded

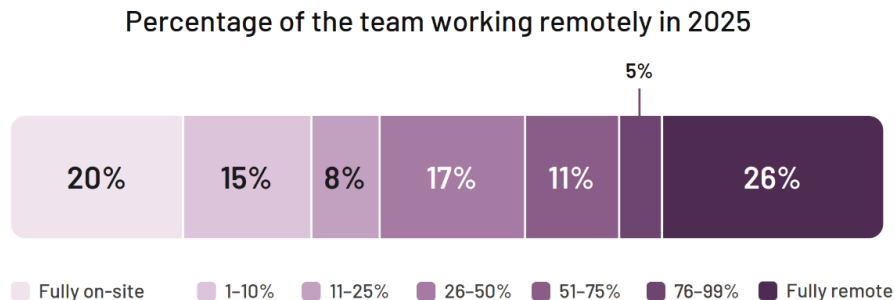
Graph 24: Q12. Company size vs. Q13. Technical and Non-technical (n=102)

A final dimension of workforce structure concerns where employees work. Remote arrangements are now embedded across the sector, though companies are distributed unevenly along the spectrum. A quarter of companies (26%) operate as fully remote teams, the single largest category. At the opposite end, 20% work entirely on-site. Between these poles, arrangements vary: 15% of companies have a tenth or less of staff working remotely, 8% between a tenth and a quarter, 17% between a quarter and half, 11% between half and three-quarters, and 5% almost all.

Grouping these, just over half of companies (55%) operate some form of hybrid arrangement, while the remainder divide between fully remote and fully on-site models. The sector has not converged on a single approach; it has diversified into several.

The comparison with the previous edition points to a distinct shift⁷. The share of fully remote companies is unchanged at 26%, but fully on-site working has nearly doubled, from 11% to 20%. The hybrid middle has contracted correspondingly, from 63% to 55%, with the sharpest fall among companies having between a tenth and a quarter of staff remote. Companies appear to be moving away from partial arrangements toward one pole or the other, either committing to remote operation or returning fully to the office, rather than maintaining a mixed model.

This has implications for the workforce composition described above. Fully remote operation removes geographic constraints on hiring, which matters in a sector concentrated in a single city, a Prishtina-based company operating remotely can recruit from other major cities without requiring relocation. The near-doubling of fully on-site working therefore runs counter to one of the few available mechanisms for broadening the sector's talent pool beyond the capital.



Graph 25: Q16. What percentage of your team worked remotely in 2025? (n=102)

Recruitment Challenges & Staff Development

Finding qualified people is a defining constraint on Kosovo's ICT sector, and the results here confirm it. Fewer than one company in ten (10%) found hiring skilled staff easy in 2025. The majority (58%) described it as moderately difficult, and a further 32% found it hard. Taken together, nine in ten companies encountered some degree of difficulty in recruiting the people they needed.

⁷ STIKK, *Kosovo IT Barometer 2023-2024*, November 2025, Graph 23.

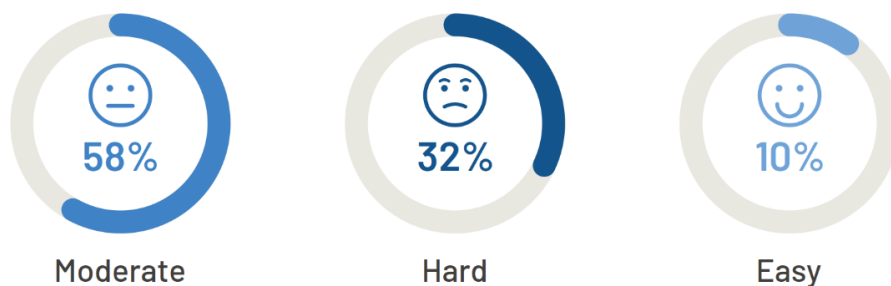
Two features of this distribution deserve attention. The first is that ease of hiring is genuinely rare. In most labor markets a substantial minority of employers report no difficulty, particularly among smaller firms recruiting for junior roles. Here that group is marginal, which suggests the constraint operates across the sector rather than affecting only companies seeking specialized or senior skills.

The comparison with the previous edition is unfavorable. In 2023–2024, 20% of companies found hiring easy; that share has now halved to 10%. Over the same period the proportion finding it hard rose from 25% to 32%. Combining the two difficulty categories, companies reporting some degree of recruitment difficulty have risen from 80% to 90%. Read against the 2021–2022 edition, where 74% reported a shortage of skilled or qualified workers, the trajectory is consistent: recruitment conditions in Kosovo's ICT sector have tightened in each successive edition of this Barometer⁸.

The second is the size of the "hard" category. Nearly a third of companies did not merely encounter friction in recruitment but found it genuinely difficult, a proportion that, in a sector composed overwhelmingly of firms with fewer than ten employees, translates into real limits on capacity. For a company of five people, an unfilled position is a fifth of its delivery capability, and prolonged vacancies constrain the contracts it can accept.

This finding sits directly alongside the workforce structure described earlier. Most companies have no human resource's function, meaning recruitment is carried out by owners or technical leads alongside their existing responsibilities. Difficulty in hiring therefore reflects not only the supply of candidates in the market but the limited capacity of these firms to search, assess, and compete for them.

Difficulty hiring skilled staff in 2025



Graph 26: Q15. How easy was it to hire skilled staff in 2025? (n=102)

Asked which skills were hardest to find, companies pointed above all to programming. Two in five (40%) identified specific programming languages as their most difficult recruitment area, well ahead

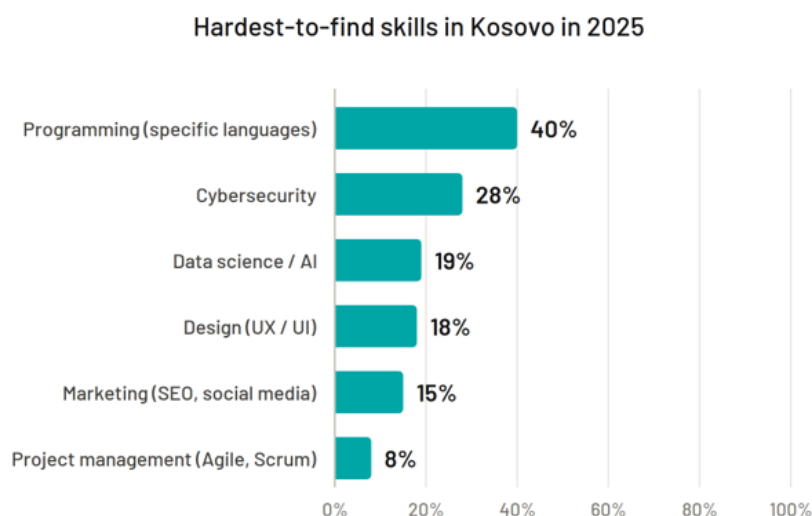
⁸ Kosovo ICT Association (STIKK), *Kosovo IT Barometer 2023–2024*, Prishtina, November 2025, Graph 22. Study conducted by Kantar with the support of the "Skills for sustainable jobs in Kosovo" project, funded by the Grand Duchy of Luxembourg and implemented by LuxDev. The 2021–2022 figure derives from a yes/no question on skilled worker shortages rather than the three-point scale used subsequently, so the comparison across all three editions is indicative rather than exact.

of any other category. Cybersecurity follows at 28%, then data science and AI (19%), design (18%), marketing (15%), and project management (8%).

Cybersecurity is offered as a service by 28% of technology companies and named as a hard-to-find skill by exactly the same proportion, indicating that firms entering this area encounter a labor market that has not kept pace with demand. Data science and AI show a similar though less acute pattern. By contrast, project management registers as the least difficult category, these skills are more transferable across industries and draw on a wider candidate pool than specialized technical roles.

The ordering of these difficulties has shifted since the previous edition. Programming remains the leading constraint, though its share has fallen from 53% to 40%. Data science and AI, previously the second most difficult area at 30%, has dropped to 19%. Moving in the opposite direction, cybersecurity has risen from 21% to 28% and now ranks second, while marketing has more than doubled from 6% to 15% and design has risen from 12% to 18%⁹.

The decline in the programming and data science figures should not be read as an easing of those shortages, since overall recruitment difficulty has increased over the same period. It reflects rather a broadening of where difficulty is felt. In the previous edition, hiring problems were concentrated in two technical specialisms; they are now distributed more evenly across technical, security, design, and marketing roles. The shortage has become less a matter of specific scarce skills and more a general condition of the labor market.



Graph 27: Q18. What skills were hardest to find in Kosovo in 2025? (n=102)

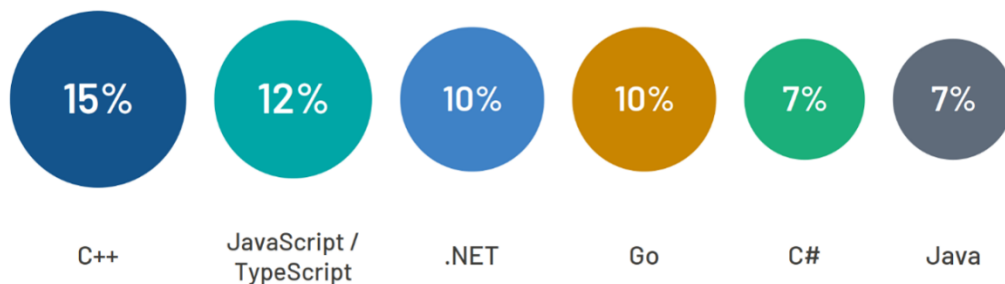
Companies naming programming were asked to specify which languages. C++ was cited most frequently, by 15% of the 41 companies concerned, followed by the JavaScript and TypeScript family including Angular (12%), .NET and Go (10% each), and C# and Java (7% each).

⁹ STIKK, *Kosovo IT Barometer 2023–2024*, November 2025, Graph 25.

Set against the technology stack reported earlier, this reveals something instructive. Several of the hardest-to-find languages are not the ones the sector most commonly uses. C++ tops this list yet was reported as a working technology by only a handful of companies, and Go shows the same pattern. Rather than indicating shortages in the sector's mainstream, this suggests that scarcity itself constrains what companies can take on, capabilities that are difficult to recruit for do not become widespread, and the technology profile of the sector is shaped in part by which skills are available to hire. The JavaScript and TypeScript entry is the exception, here a widely used technology is also difficult to staff, which points to competition for talent within the sector's core rather than to absence from the market.

Hardest-to-find skills in Kosovo in 2025

Top 6 programming skills named as hardest to find



Graph 28: Q18.1. What skills were hardest to find in Kosovo in 2025: Programming (n=41)

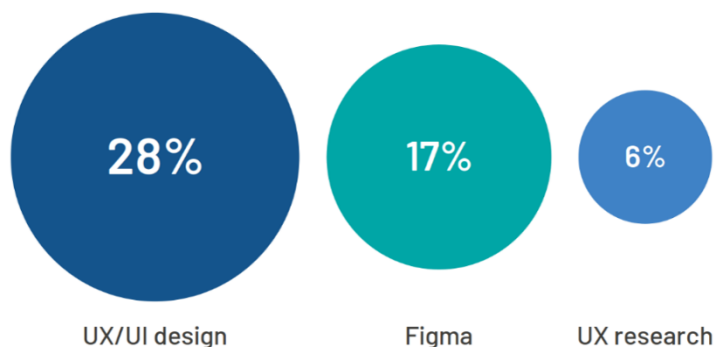
Within design, the difficulty concentrates on user experience and interface work. UX/UI design was named by five of the eighteen companies citing design as a problem area, Figma by three, and UX research by one. Marketing difficulties center on search engine optimization, named by five of the sixteen companies concerned, followed by paid advertising (three), digital marketing (two), and product marketing (one). Among the eight companies naming project management, three pointed to Agile or Scrum expertise and two to technical project management.

A characteristic shared across all three areas is worth noting, a substantial share of respondents named the field without specifying a skill within it, half of those citing design, just under a third of those citing marketing, and three of the eight citing project management. This may indicate that the difficulty is experienced as a general scarcity of capable people rather than as a gap in any particular tool or technique.

The project management responses also refine the earlier reading of that category. The transferability of these skills across industries offers one explanation for why so few companies reported difficulty. The specifics reported here suggest a further one, what companies struggle to find is not general project management but its technical variant, people able to run Agile delivery within a software environment, combining process discipline with enough technical understanding to work credibly with engineering teams. That is a narrower requirement than the category label implies.

Hardest-to-find skills in Kosovo in 2025

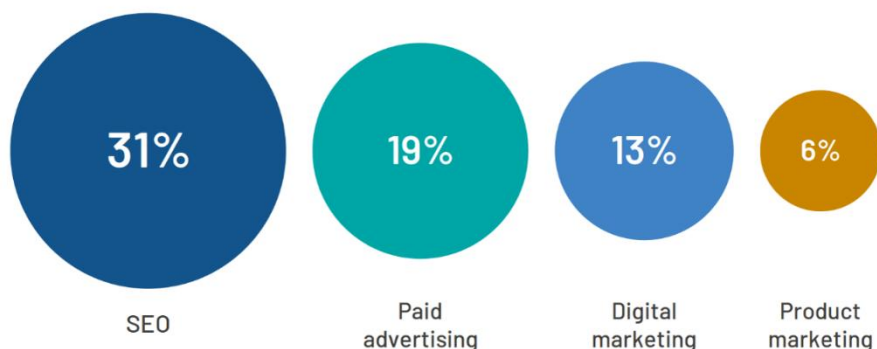
Design skills named as hardest to find



Graph 29: Q18.2. What skills were hardest to find in Kosovo in 2025: Design (*n=18)

Hardest-to-find skills in Kosovo in 2025

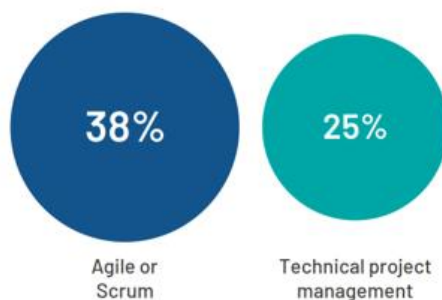
Marketing skills named as hardest to find



Graph 30: Q18.3. What skills were hardest to find in Kosovo in 2025: Marketing (*n=16)

Hardest-to-find skills in Kosovo in 2025

Project management skills named as hardest to find



Graph 31: Q18.4. What skills were hardest to find in Kosovo in 2025: Project Management (*n=8)

Investment in developing existing staff is uneven. Two-thirds of companies made some investment in training or upskilling during 2025, but the majority of these did so only occasionally, 40% report occasional investment against 28% investing regularly. Nearly one company in five (18%) made no investment at all, 8% considered the question not applicable to them, and 6% preferred not to answer.

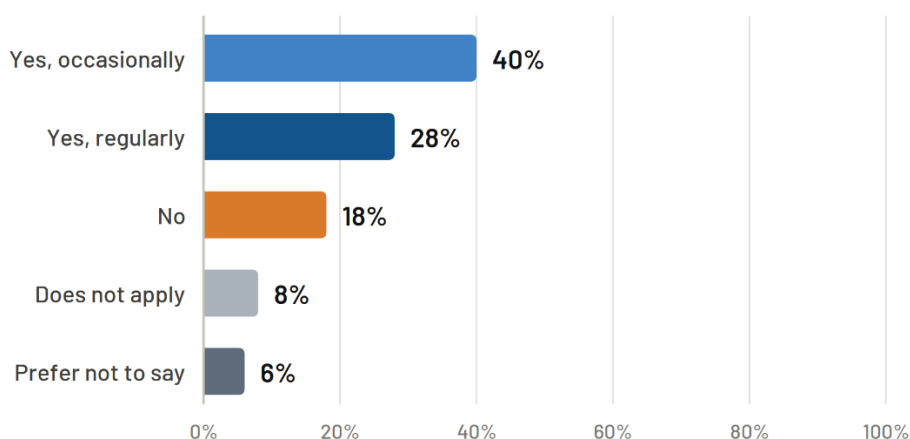
The balance between occasional and regular investment is the point of interest. Regular investment implies a budget line and a plan, an assumption that skills require continuous renewal and that the company will fund it. Occasional investment describes something different, training undertaken when a specific project demands it, when a client requires a certification, or when funds happen to be available. That the occasional group is substantially the larger of the two indicates that in most companies' staff development is reactive rather than planned.

These figures have moved little since the previous edition, though the direction is downward. Occasional investment is unchanged at 40%, while regular investment has fallen from 33% to 28% and the share investing nothing has risen from 15% to 18%. The shifts are small and within the range that sampling variation could produce, but they run counter to what the recruitment findings would suggest. As hiring has become harder, investment in developing existing staff has not increased to compensate.

Set against the recruitment findings, this is a notable pattern. Nine in ten companies reported difficulty hiring skilled staff, yet fewer than three in ten invest regularly in developing the staff they already have. Where talent is scarce in the external market, internal development is the obvious alternative route to capability, and it is being used systematically by a minority of firms.

Company size offers a large part of the explanation. Training carries a double cost for a small firm, the fee, and the billable time lost while an employee is learning rather than delivering. For a company of five people, releasing one person for a week removes a fifth of its capacity. This does not make the underinvestment less consequential, it means the constraint is structural, and that external support of the kind examined later in this report has a clear role to play.

Employee training & upskilling investment in 2025

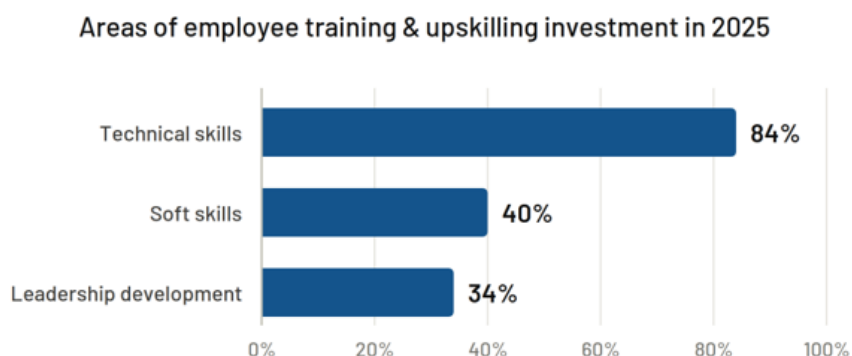


Graph 32: Q19. Did your company invest in employee training or upskilling in 2025? (n=102)

Among the 70 companies that invested in training, the focus falls decisively on technical capability. Technical skills were the target of investment in 84% of these companies, well ahead of soft skills at 40% and leadership development at 34%.

The dominance of technical training is unsurprising given the sector's composition, and it aligns with where recruitment difficulty is concentrated. Companies unable to hire the programming, cybersecurity, or data skills they need are, in part, developing those capabilities internally instead. Read this way, technical training functions as a partial substitute for recruitment rather than as a separate activity.

The other two categories are worth noting for what they suggest about how companies view capability. That two in five invest in soft skills indicates a recognition that client communication, teamwork, and adaptability bear on delivery alongside technical proficiency, relevant in a sector where three-quarters of companies work with clients abroad. Leadership development, reported by a third, is more notable in a sector composed largely of micro-enterprises, where formal management layers are rare.



Graph 33: Q19a. In what areas? (n=70)

Salary Rates & Staff Development Expenditures

Pay in Kosovo's ICT sector varies sharply by function, and the pattern reveals which capabilities companies compete hardest to secure.

The proportion of companies employing each function varies widely, and this itself is informative. Technical and engineering staff are employed by 91% of companies, but leadership by 73%, product and management by 68%, and data and AI, sales, and creative roles by only around half. Salary figures for each function therefore describe the companies that employ it, not the sector as a whole.

Leadership roles command the highest pay by a clear margin. More than a quarter of companies (27%) pay leadership staff above €3,000 per month, and 46% pay above €2,500. Only 10% pay leadership below €1,000, the lowest such share of any function.

Data and AI are the highest-paid technical function. Two-fifths of companies (40%) pay these staff above €1,500, and 16% pay above €2,500. This is a striking position for a role that fewer than half of companies employ at all, and it reflects the scarcity documented earlier in this section, firms recruiting in an area where skills are difficult to find pay to secure them.

Technical and engineering staff, the most widely employed function, cluster tightly in the middle of the distribution. Two-fifths of companies (40%) pay between €1,001 and €1,500, and a further 23% between €1,501 and €2,000. Fewer than 20% pay below €1,000, but only 10% pay above €2,500. The concentration reflects an established market rate for core engineering work; the sector's largest pay category is also its most predictable.

Business operations and product and management occupy an intermediate position, with the majority of companies paying between €501 and €2,000 and modest representation at the upper end.

At the lower end of the distribution sit the client-facing and creative functions. Digital creativity and content is the lowest paid, 61% of companies pay these staff €1,000 or less, and only 8% pay above €2,000. Digital marketing and growth follow closely, with 60% paying €1,000 or less. Sales and customer relations show a similar concentration at 51%, though with a longer tail into the higher bands.

The overall structure is unambiguous. Specialized technical skills and leadership responsibility command a substantial premium, while creative, marketing, and client-facing roles remain considerably less well compensated. The gap is not marginal; a company is roughly three times more likely to pay a data and AI specialist above €2,500 than a digital creativity employee.

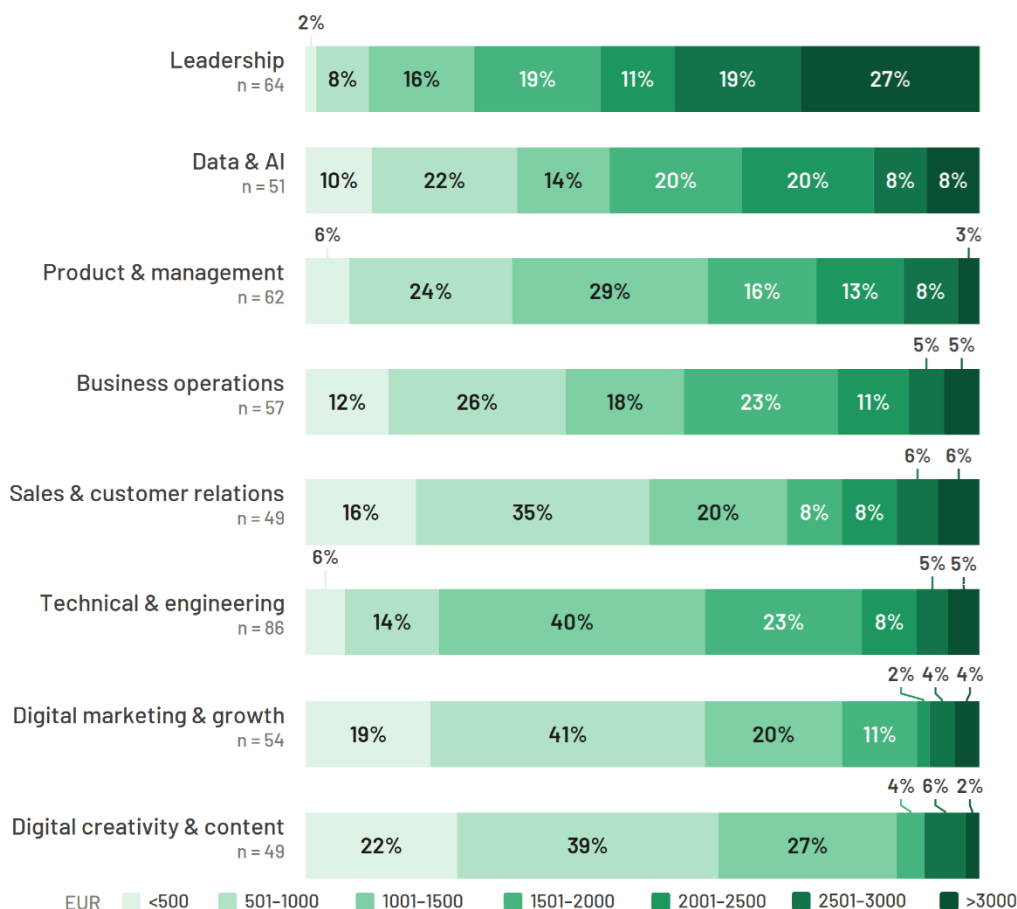
Compared with the previous edition, pay has risen across every function¹⁰. The share of companies paying leadership above €1,000 has increased from 66% to 91%, technical and engineering from 67% to 80%, and data and AI from 47% to 69%. At the lower end, the concentration of creative and client-facing roles below €1,000 has eased: digital creativity and content from 75% to 61%, digital marketing and growth from 73% to 59%, and sales and customer relations from 64% to 51%.

The direction is consistent across all functions and aligns with the recruitment findings – a tightening labor market exerts upward pressure on pay. The scale of the movement in a single year should nonetheless be treated with some caution, as the two editions draw on different respondents and cover periods of different length. What the data support with confidence is that salaries rose; the precise magnitude is less certain.

The relative structure, however, is unchanged. Leadership and specialized technical functions remain at the top, creative and client-facing roles at the bottom, and the distance between them has not narrowed appreciably. Pay levels across the sector have risen together rather than converging.

¹⁰ STIKK, Kosovo IT Barometer 2023–2024, November 2025, Table 6.

Average monthly salary range by role in 2025



Graph 34: Q14. What was the average monthly salary range for your staff in 2025? (n=102)

Salaries are the largest and most visible cost a company carries for its people, but they are not the only one. Where recruitment is difficult and the market for skills is tight, what a company spends on developing the staff it already has becomes part of the same calculation – the alternative to paying a premium for capability on the open market is building it internally. Grouping the two together gives a fuller view of what ICT companies actually invest in their workforce.

Among the 70 companies that invested in training during 2025, expenditure was concentrated at the lower end. Just under three in ten (29%) spent less than €1,000 over the year, and a further 26% between €1,001 and €3,000. Taken together, more than half of investing companies spent €3,000 or less. Above that, 13% spent between €3,001 and €5,000 and 9% between €5,001 and €8,000, while only 7% spent more than €8,000. Seventeen per cent preferred not to disclose.

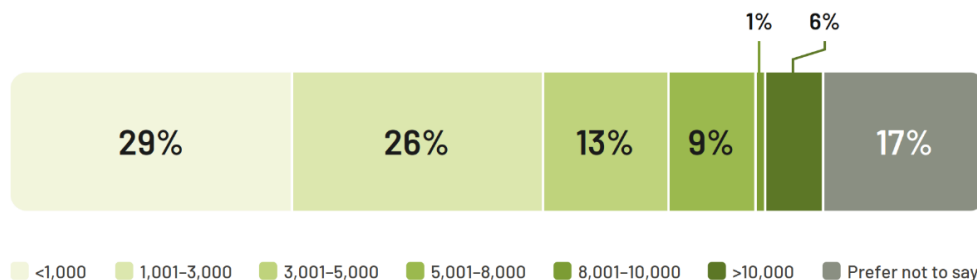
Read against the number of people involved, these sums are modest. A company of five employees spending €1,000 across a year is investing €200 per person, sufficient for an online course or a single certification exam, but not for structured, sustained development. Even the €1,001–€3,000 band, in

a sector where most firms employ fewer than ten people, translates into a few hundred euros per employee.

This gives the earlier finding on training frequency a sharper edge. Two-thirds of companies invest in training, which reads as reasonably healthy engagement, but the amounts involved show that most of this investment is small-scale. Occasional participation and low expenditure describe the same underlying pattern, training that responds to immediate needs rather than building capability systematically.

The context established earlier explains why. Nine in ten companies find hiring difficult, most operate with fewer than ten employees, and few have a dedicated human resources function. Training competes directly with billable work for both money and time, and in firms of this size the trade-off is immediate. The result is a sector that recognizes the value of developing its people but lacks the scale to do so at any depth.

Employee training & certification expenditure in 2025



Graph 35: Q19b. How much have you spent on training and certifications of your employees in 2025? (n=70)

Training expenditure follows company size closely. Among micro-enterprises investing in training, 38% spent less than €1,000 across the year and a further 31% between €1,001 and €3,000, close to seven in ten spending €3,000 or less. None spent more than €5,000.

Small enterprises show a wider distribution, with 30% below €1,000 but 15% spending between €5,001 and €8,000 and 11% above €10,000. Among medium-sized companies the pattern inverts entirely, none spent below €1,000, while 38% spent between €3,001 and €5,000 and a quarter above €8,000.

This substantiates the constraint identified earlier. The modest training expenditure recorded across the sector is not evenly distributed but concentrated among the smallest firms, which face the double cost of fees and foregone billable time most acutely. Companies of fifty or more employees invest at levels that allow structured development; those of fewer than ten do not, and cannot readily do so within their own resources.

Results for medium-sized companies rest on eight firms and are indicative only.

Employee training & certification expenditures in 2025 by company size

	1-9 (Micro-enterprise)	10-49 (Small enterprise)	50-249 (Medium enterprise)
<1000	38%	30%	-
1001-3000	31%	26%	13%
3001-5000	9%	11%	38%
5001-8000	-	15%	25%
8001-10000	-	-	13%
>10001	-	11%	13%
Prefer not to say	22%	7%	-

Excludes 2 large enterprises and 1 company that did not disclose headcount, too few to present separately.

Table 4: Q19b. Employee training & certification expenditures in 2025? – Presented by Company size

AI Adoption & Its Impact on Roles

The findings reported earlier established that AI use is now universal across Kosovo's ICT sector. This subsection turns to the consequence that matters most for workforce planning, whether that adoption has begun to change the roles companies need. It is a new line of enquiry in this edition of the Barometer, introduced in response to how rapidly the technology has spread, and the results reported here therefore establish a baseline rather than a trend.

Companies are divided on the question. Just under half (46%) report that AI has already reduced the need for certain roles within their organization. A quarter (24%) report no such effect, while three in ten (30%) say it is too early to tell.

The size of the affirmative group is the headline. Within a single year of near-universal adoption, close to half of ICT companies in Kosovo identify a measurable reduction in their need for particular roles. This is not a projection about future disruption but an account of change that employers report has already occurred.

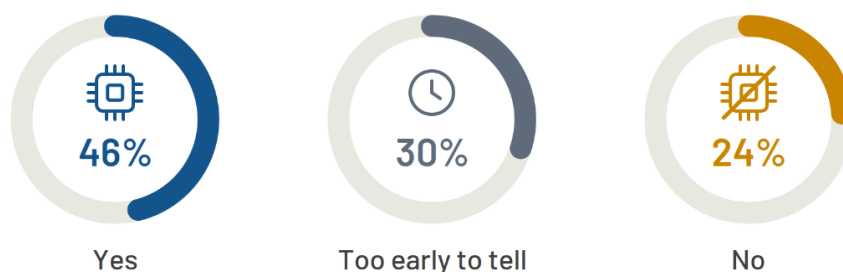
At the same time, the finding should be read carefully. A reduced need for certain roles does not necessarily mean redundancies, it may equally describe positions not filled, work absorbed by existing staff, or hiring plans revised downward.

The 30% answering "too early to tell" also merit attention. Rather than a straightforward absence of impact, this group describes uncertainty, companies that have adopted AI but cannot yet judge what it means for their staffing. Given that adoption reached full coverage only recently, this is the expected position, and it suggests the 46% figure may understate the eventual extent of change rather than overstate it.

Read alongside the recruitment findings, the result carries a particular significance. Nine in ten companies report difficulty hiring skilled staff, and almost half report that AI has reduced their need

for certain roles. These are not contradictory. They indicate a labor market in which demand is shifting rather than contracting, where the roles that are becoming easier to do without are not the roles companies are struggling to fill.

Impact of AI on workforce needs



Graph 36: Q20a. Has AI reduced the need for certain roles in your company? (n=102)

Among the 47 companies reporting a reduced need for certain roles, the impact falls overwhelmingly on the least experienced. Intern and junior positions were identified by 87% of these companies, far ahead of any other category. Mid-level roles follow at 51%, administration at 30%, and management at 19%. Lead and architect roles (9%) and senior positions (6%) are almost untouched.

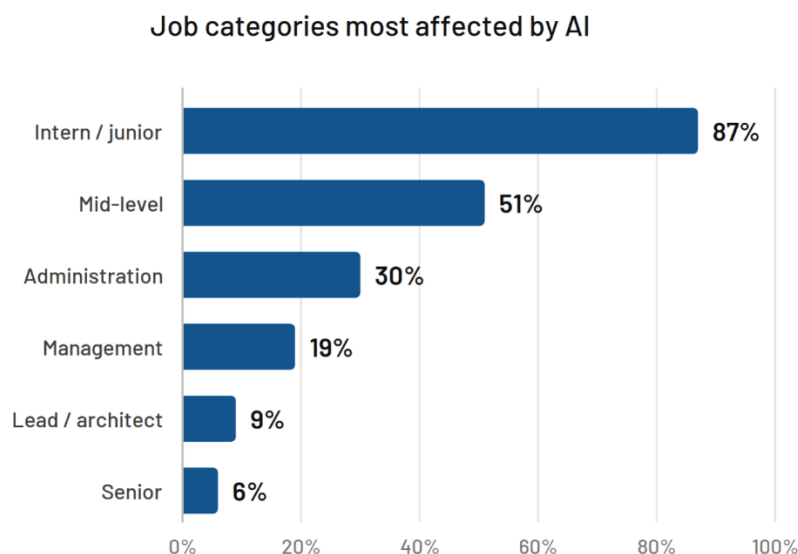
The gradient is steep and consistent, the more experience a role requires, the less it has been affected. This is what would be expected from the applications documented earlier in this report. Code generation, debugging, documentation, summarization, and content production, the tasks where AI use is most concentrated, are precisely the work that junior staff have traditionally performed while developing toward more complex responsibilities. The 30% figure for administration reflects the same logic applied to routine non-technical work.

This finding presents the sector with a difficulty it has not previously faced. Nine in ten companies report difficulty hiring skilled staff, and the skills they struggle to find are specialized and experienced. Yet the entry-level roles through which people acquire that experience are the roles AI is displacing first. If junior positions contract while demand for senior expertise intensifies, the mechanism by which the sector produces its own senior talent is weakened at exactly the moment it is most needed.

The consequences may extend beyond individual companies. Entry-level roles are where inexperienced staff acquire the capabilities that companies later struggle to recruit, and this report records both a contraction in those roles and a rising difficulty in finding experienced people. Whether the first is contributing to the second cannot be established from a single year of data, and the relationship is one that successive editions of this Barometer would be well placed to track.

It is worth restating that these results describe the 47 companies reporting an impact, not the full sample. The remaining 55 reported either no effect or that it was too early to judge. What the data

establish is that where AI has changed workforce needs, the change has been concentrated almost entirely at the entry level.



Graph 37: Q20b. If yes, which categories have been most affected? (n=47)

Companies reporting an impact were asked what form it took. Across all affected roles, the most common outcome was a reduction in headcount, reported by 43% of these companies. Full replacement of a role accounts for 23%, a change in the required skill set for 21%, and increased productivity without any reduction in staff for 13%.

This qualifies the headline figure considerably. Of the 47 companies reporting that AI reduced the need for certain roles, only around one in five saw a role disappear altogether. For the remaining four in five, the effect was smaller in scale, fewer people doing the same work, different skills required within the same role, or simply more output from the existing team. Taken together, a third of affected companies report outcomes, changed skill sets or higher productivity, that involve no reduction in staff at all.

The breakdown by seniority can be read with confidence only for the two most affected groups, since the remaining columns rest on very small numbers of companies. Among the 41 companies reporting an impact on intern and junior roles, 39% saw headcount reduced and 27% saw roles fully replaced, while 22% report that the required skill set changed rather than the position disappearing. Among the 24 reporting an impact on mid-level roles, the effect concentrates more heavily on headcount at 54%, with full replacement lower at 21%.

The distinction matters for how the entry-level finding is understood. AI is not simply eliminating junior positions; in a substantial share of cases, it is redefining what a junior employee is expected to do. The work that once constituted an entry-level role, routine coding, documentation, basic content production, is increasingly automated, and what remains requires a different starting capability.

The remaining columns should be treated as indicative only. Administration rests on 14 companies and management on nine, while lead and architect roles rest on four and senior roles on three. At these bases a single company account for a quarter or a third of the column, and the apparently high rates of full replacement among senior and lead roles reflect one or two responses rather than a sector pattern. They are reported for completeness and should not be compared against the intern and mid-level figures.

Workforce Categories Affected by AI Integration

	Total	Intern/Junior (n=41)	Mid-level (n=24)	Senior (n=3)	Lead/Architect (n=4)	Management (n=9)	Administration (n=14)
Fully replaced the role	23%	27%	21%	33%	50%	45%	43%
Reduced headcount	43%	39%	54%	67%	50%	33%	36%
Changed the required skill set	21%	22%	13%	0%	0%	11%	7%
Increased productivity without reducing staff	13%	12%	12%	0%	0%	11%	14%

Table 5: Q20c. For affected roles, has AI primarily? (n=47)

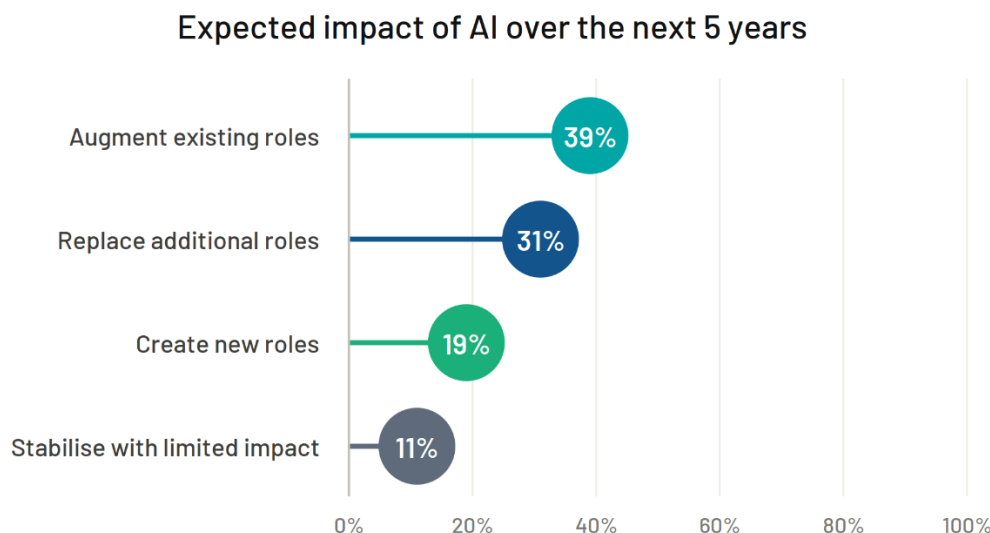
Asked what they expect over the coming five years, companies divide across four distinct outlooks. The largest group, at 39%, expects AI to primarily augment existing roles rather than eliminate them. Just under a third (31%) expect it to replace additional roles. Around one in five (19%) anticipate the creation of new roles, and 11% expect the effect to stabilize with limited further impact.

Read together, these responses describe a sector that expects continued change but not, in the main, contraction. Nearly six in ten companies foresee an outcome in which employment holds or grows, augmentation, new roles, or stabilization, against three in ten expecting further displacement. Set against the finding that 46% report displacement has already occurred, the balance of expectation is that the sharpest phase of adjustment may have passed.

The most notable feature of these results is how evenly opinion is distributed. No outlook commands a majority, and the leading position holds under two in five. In a sector where AI adoption is universal and where nearly half report workforce effects already, this dispersion indicates that companies have no shared reading of where the technology leads. That uncertainty is itself a finding, forward planning for skills and recruitment is being conducted against fundamentally different assumptions about the future from one company to the next.

The 19% expecting new roles is worth isolating. These are companies anticipating not merely that existing work will be reshaped but that new functions will emerge, a considerably more optimistic reading than either augmentation or replacement implies. The distinction matters for the entry-level contraction documented above. If new roles do emerge, that contraction may prove transitional; if they do not, access to the sector will have narrowed permanently.

For workforce planning, the augmentation expectation is the one with the clearest implications. If two in five companies expect AI to change how existing roles are performed rather than remove them, the priority is not managing a shrinking workforce but equipping the current one to work alongside these tools. That places the emphasis on continuous skills development, an area where, as reported earlier in this section, most companies invest only occasionally and at modest levels.



Graph 38: Q20d. Over the next 5 years, do you expect AI to? (n=102)

Section 5: Market Reach, Client Demographics & Revenue Profile

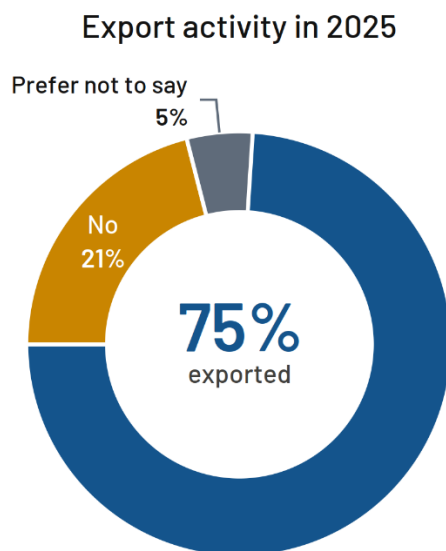
Where a company sells determines much of what it can become. The preceding sections described what Kosovo's ICT companies produce and who they employ; this section examines who buys that output and what it earns them. It covers whether companies export and to which markets, the profile of the clients they serve, and the revenue those relationships generate. For a sector composed largely of small firms in a small domestic market, the reach of that market is closely bound up with the sector's capacity to grow.

Kosovo's ICT sector is decisively outward-facing. Three-quarters of companies (75%) exported products or services during 2025, while 21% did not and 5% preferred not to answer.

This is the defining structural feature of the sector. In an economy where most industries serve primarily domestic demand, an export rate of three in four places ICT in a distinct category. The explanation lies in the nature of the product, software and digital services carry no shipping costs, face no customs procedures, and can be delivered from Prishtina to a client anywhere without physical presence. The barriers that constrain exporters in most other sectors do not apply.

The implications run through much of what this report has already documented. It explains why 46% of companies hold international certifications such as ISO 27001 and ISO 9001, which are typically required by foreign clients rather than domestic ones. It explains the sector's cloud infrastructure

choices, distributed across AWS, Azure, and Google Cloud according to what clients specify. And it bears on the salary findings, companies earning in export markets can sustain pay levels that a purely domestic revenue base would not support.



Graph 39: Q21. Did your company export any products or services in 2025? (n=102)

Export activity rises steadily with company size. Two-thirds of micro-enterprises (66%) exported during 2025, compared with 83% of small enterprises, 90% of medium-sized companies, and both large enterprises. Non-exporters are concentrated almost entirely among the smallest firms, 29% of micro-enterprises did not export, against 10% of small and medium companies and none of the large.

The gradient is consistent and points to export capacity being a function of scale. Winning and servicing a foreign client requires capabilities that accumulate with size, the certifications international clients expect, the English-language capacity, the administrative ability to handle cross-border contracting and payment, and the delivery capacity to commit to a project of meaningful duration. A company of five people can meet these requirements, and two-thirds of them do, but they meet them less reliably than a company of thirty. The same pattern appears in revenue terms, where all 21 companies reporting turnover between €250,001 and €1 million exported during 2025.

This qualifies the earlier finding on non-exporters. That group is not distributed evenly across the sector; it is overwhelmingly composed of micro-enterprises. Seventeen of the 21 non-exporting companies employ fewer than ten people.

The finding also carries an implication for how the sector might grow. Since exporting is close to universal among companies of ten or more employees, the route to broader export participation runs partly through enabling micro-enterprises to reach that scale, which returns to the constraints documented throughout this report on recruitment, client acquisition, and access to support.

Service export in 2025 by company size

	Yes	No	Prefer not to say
1-9 (Micro-enterprise)	66%	29%	5%
10-49 (Small enterprise)	83%	10%	7%
50-249 (Medium enterprise)	90%	10%	-
250 or more (Large enterprise)	100%	-	-

Table 6: Q21. Did your company export any products or services in 2025? – Presented by Company size

Companies were asked which markets their clients were based in and what share of revenue each represented. The figures below report two measures, the number of times each market was named, and the average share of revenue that market represents among the companies naming it. Where results are grouped by region, the count is of country mentions rather than of companies, so a company naming two countries within the same region is counted twice. Averages are calculated only on companies naming a given market, not across the full sample, and the country table lists markets mentioned by five or more companies.

Kosovo remains the single most frequently named market, cited by 57 companies, and it is by some distance the most concentrated, on average, companies serving domestic clients derive 65% of their revenue from them. This is a higher dependency than any foreign market generates, and it points to a pattern in which domestic work, where it exists, tends to constitute the bulk of a company's business rather than one stream among several.

The United States is the leading export destination, named by 37 companies with an average revenue share of 44%. Germany follows closely on mentions (36 companies) though at a lower average share of 34%, with Switzerland (25 companies, 34%) and the United Kingdom (20 companies, 26%) completing the group of major markets. Taken together, the DACH region was named by companies more often than any other foreign region, and North America generates the highest average revenue share of any region at 44%.

The distinction between the two measures is worth drawing out. Frequency of mention indicates how many companies have established a presence in a market; average revenue share indicates how central that market is to the companies that serve it. Belgium illustrates the difference, only eight companies name it, but those that do derive 53% of revenue from it on average. Albania shows the inverse, 17 companies serve it, but it accounts for only 13% of their revenue. The first pattern describes deep relationships with a small number of firms; the second, a widely accessible market that few build a business around.

Regionally, the picture is one of concentration in three areas. Domestic and immediate neighbors account for the most mentions (87), followed by DACH (73) and North America (41). Because these are country mentions rather than company counts, the regional figures partly reflect how many countries a region contains, DACH's 73 mentions are spread across Germany, Switzerland, and Austria, while North America's 41 come almost entirely from the United States. Beyond these three,

presence thins considerably, the United Kingdom and Ireland account for 21 mentions, the Nordic region 19, and Benelux 17, while the Gulf region (5) and other international markets (4) are marginal.

Two features of this distribution matter for the sector's prospects. The first is that Kosovo's ICT exports are directed overwhelmingly toward high-income markets, which supports the salary levels documented earlier, companies billing in Western European and American markets can pay rates that domestic revenue alone would not sustain. The second is the narrowness of that base. With three regions accounting for the substantial majority of export activity, the sector's exposure to demand conditions in Germany, Switzerland, and the United States is considerable, and diversification beyond them remains limited.

Clients markets in 2025		
Regions	n=	Avg %
Domestic & Immediate Neighbors	87	18%
DACH Region	73	29%
Benelux Region	17	37%
Nordic Region	19	32%
United Kingdom & Ireland	21	26%
Other Key European Markets	29	21%
North America	41	44%
Gulf Region	5	6%
Other International Markets	4	18%

Table 7: Q22. Where did most of your clients come from in 2025? – Presented by Region (n=100)

Clients markets in 2025 - TOP mentions		
Country	n=	Avg %
Kosovo	57	65%
United States of America	37	44%
Germany	36	34%
Switzerland	25	34%
United Kingdom	20	26%
Albania	17	13%
Austria	12	19%
Sweden	10	23%
Belgium	8	53%
Norway	7	41%
The Netherlands	6	35%
Slovenia	6	36%
N.Macedonia	6	4%
Italy	5	10%

Table 8: Q22. Where did most of your clients come from in 2025? – Presented by Country

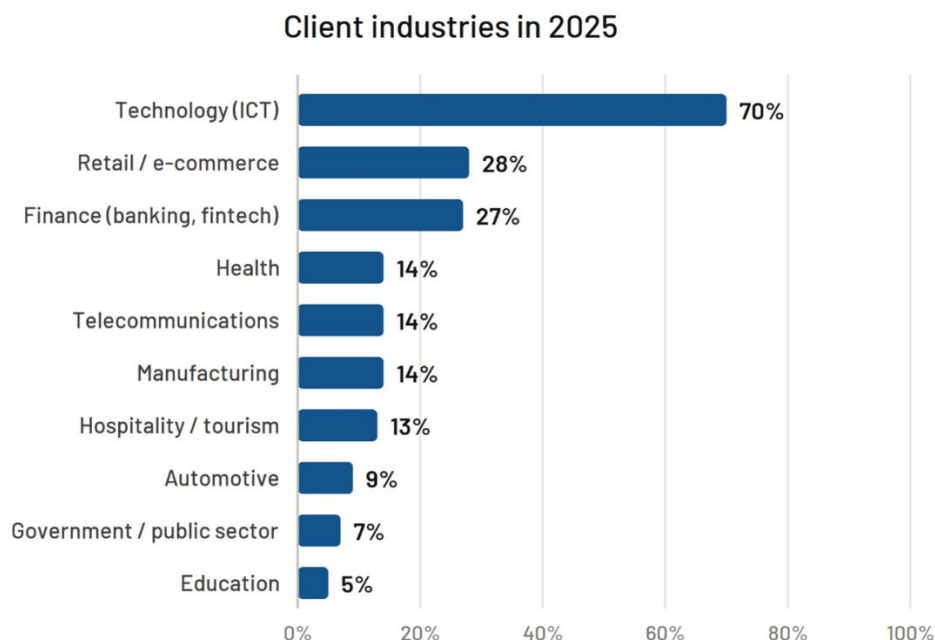
The industries these companies serve reveal a sector that sells substantially to itself. Technology and ICT clients were named by 70% of companies, more than twice as often as any other industry. Retail and e-commerce follow at 28% and finance, including banking and fintech, at 27%. Health, telecommunications, and manufacturing each account for 14%, hospitality and tourism 13%, automotive 9%, government and public sector 7%, and education 5%.

The dominance of technology clients is the defining feature of this distribution, and it describes a particular business model. Kosovar ICT companies are not, for the most part, building software for banks, hospitals, or manufacturers directly. They are working for other technology companies, as subcontractors, outsourcing partners, or providers of specialist capacity to firms that hold the end-client relationship. Read alongside the export findings, the picture becomes clearer, three-quarters of companies' export, and what they export is largely development capability sold to technology businesses in Germany, Switzerland, and the United States.

This model has clear advantages. Selling to technology clients requires no deep sector expertise in the client's industry, no regulatory knowledge of health or financial services, and no established reputation in a vertical market. It is the most accessible route into export for a small firm, and it explains how a sector composed largely of micro-enterprises achieves a 75% export rate.

It also imposes a ceiling. Companies positioned as subcontractors capture a fraction of the value of the end product and compete primarily on cost and availability rather than on domain knowledge. The higher-value work, the systems that require understanding a client's regulatory environment, business processes, and competitive position, sits with the firms holding the direct relationship. That the more specialized verticals appear so far down this list suggests few Kosovar companies have yet moved into that position.

The low figure for government and public sector clients, at 7%, is notable in a different way. Public institutions are substantial purchasers of ICT services in most economies, and digitalization of government services has been a policy priority in Kosovo. That so few companies count public bodies among their clients suggests either that this demand is being met through other channels or that procurement is not readily accessible to the small firms that make up most of the sector.



Graph 40: Q23. Which industries did your clients belong to in 2025? (n=102)

Examining which companies serve each industry reveals how client relationships are distributed across the sector. Because micro-enterprises constitute the majority of companies, they account for the largest share in most industries as a matter of composition. Two sectors depart from that pattern.

Automotive clients are served predominantly by small enterprises, which account for 56% of the companies working in that sector, against 22% for micro-enterprises. This is the only industry in which the smallest firms are not the largest group. Education shows a similar tilt, with small enterprises accounting for 60% of companies serving it.

At the other end, the industries most accessible to companies without scale are clearly identifiable. Retail and e-commerce and hospitality and tourism are each served by micro-enterprises in 62% of cases, and technology clients in 58%. Construction, marketing and advertising, and research and data services are served exclusively by micro-enterprises, though each rests on a single company.

Health, telecommunications, and finance show more even distributions across the size bands. Health is the most balanced of all, with micro-enterprises and medium-sized companies each accounting for 29% of the firms serving it and small enterprises 36%, a marked contrast to the sector's overall size composition, and an indication that clients in this industry are served across the full range of company sizes rather than concentrated among the smallest.

Government and public sector clients are served in equal measure by micro and small enterprises, at 43% each. Given that only seven companies in the entire sample count public bodies among their clients, this describes three companies in each category and should not be read as a pattern.

Results for medium and large enterprises rest on very small numbers throughout – no more than four companies in any cell – and are reported for completeness rather than as reliable distributions.

Client portfolio by industry sector in 2025 by company size

	1-9 (Micro-enterprise)	10-49 (Small enterprise)	50-249 (Medium enterprise)	250 or more (Large enterprise)
Technology (ICT)	58%	31%	9%	1%
Automotive	22%	56%	22%	-
Finance (Banking, Fintech)	52%	30%	11%	7%
Retail / E-commerce	62%	28%	10%	-
Education	40%	60%	-	-
Health	29%	36%	29%	7%
Government / Public Sector	43%	43%	14%	-
Telecommunications	50%	21%	21%	7%
Manufacturing	50%	50%	-	-
Hospitality / Tourism	62%	31%	-	8%
Construction	100%	-	-	-
Marketing / Advertising	100%	-	-	-
Research / Data Services	100%	-	-	-
Prefer not to say	34%	67%	-	-

Table 9: Q23. Which industries did your clients belong to in 2025? – Presented by Company size

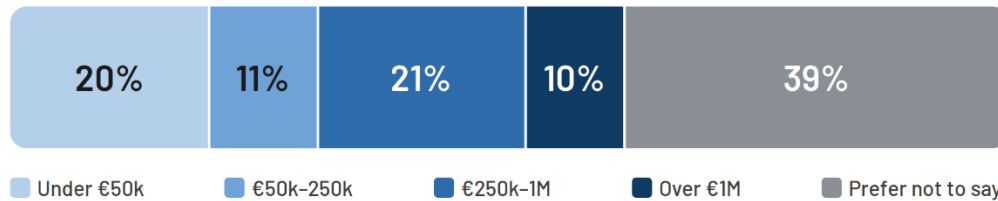
Revenue figures come with a substantial caveat, 39% of companies preferred not to disclose their turnover, the highest non-response rate to any question in the survey. The distribution below therefore describes the 62 companies that did answer.

Among those that answered, revenue is concentrated at the lower end. One in five companies (20%) reported turnover below €50,000, and 11% between €50,000 and €250,000. A further 21% fell between €250,001 and €1 million, and 10% exceeded €1 million.

Expressed as shares of the disclosing companies alone, this gives roughly a third below €50,000, a fifth between €50,000 and €250,000, a third between €250,001 and €1 million, and a sixth above €1 million. Half of disclosing companies therefore operate on turnover under €250,000, modest figures that align with the size profile established earlier, where six in ten companies employ fewer than ten people.

The scale of non-disclosure is itself informative. Revenue is commercially sensitive and non-response is expected on such questions, but at 39% it substantially exceeds the 6–16% recorded on salary questions in the same survey. Companies were more willing to disclose what they pay their staff than what they earn. The reasons are not established by the survey, though commercial sensitivity and the perceived privacy of turnover figures are plausible factors.

Approximate revenue in 2025



Graph 41: Q24. What was your approximate revenue in 2025? (n=102)

Broken down by company size, the relationship between headcount and turnover is close, as would be expected. Among micro-enterprises, 31% reported revenue below €50,000 and 17% between €50,000 and €250,000, with only 5% exceeding €250,000. Small enterprises cluster in the middle bands, 57% reported between €250,001 and €1 million and 13% above €1 million. Both medium-sized companies disclosing revenue reported above €1 million, and the one large enterprise that answered fell in the €250,001–€1 million band.

More consequential than the distribution itself is the pattern of non-disclosure, which is not evenly spread. Nearly half of micro-enterprises (47%) declined to state their revenue, against 20% of small enterprises. This means the disclosed figures under-represent precisely the group that dominates the sector, and it should be assumed that the true concentration at the lower end is greater than the headline distribution suggests. Half of medium-sized enterprises also declined, though at a base of ten companies that reflects five responses.

The upper band nonetheless indicates a small group operating at a different scale. Around one in six disclosing companies reported turnover above €1 million, and the crosstab locates most of them among small and medium-sized enterprises rather than the largest firms. Notably, no micro-enterprise reported revenue above €1 million, confirming that turnover at this level requires headcount the smallest firms do not have.

Revenue varies little by the type of service a company provides. Software development, web development, IT support, cybersecurity, and data analytics all show broadly similar distributions, and because most companies deliver several of these simultaneously, no single service line can be associated with higher earnings. The one exception is telecommunications and networking, among the 19 companies providing these services, a quarter reported revenue above €1 million, a markedly higher share than in any other service group. This is consistent with telecommunications work involving larger contracts and institutional clients, though at this base the observation is indicative only.

Aproximate revenue in 2025 by company size

	1-9 (Micro-enterprise)	10-49 (Small enterprise)	50-249 (Medium enterprise)	250 or more (Large enterprise)
<50,000 EUR	31%	7%	-	-
50,000-250,000 EUR	17%	3%	-	-
250,001-1,000,000 EUR	5%	57%	-	100%
>1,000,000 EUR	-	13%	50%	-
Prefer not to say	47%	20%	50%	-

Table 10: Q22. Q24. What was your approximate revenue in 2025? – Presented by Company size

How companies find their clients tells us a good deal about how the sector operates. Referrals and word-of-mouth dominate, cited by 60% of companies, nearly twice as often as any other channel. Online marketing through websites, SEO, and social media follows at 35%, partnerships and B2B alliances at 31%, and networking events or conferences at 19%. Public tenders and e-procurement account for 2%, and direct sales or cold calling for 1%.

That reputation is the primary route to new business is consistent with everything documented so far. Most companies have no commercial staff, and the earlier finding that 18% employ no non-technical personnel at all means business development is frequently the owner's responsibility, carried alongside delivery work. Referrals require no dedicated function; they arise from work already completed. For a small firm without a sales capability, this is less a strategy than the only available mechanism.

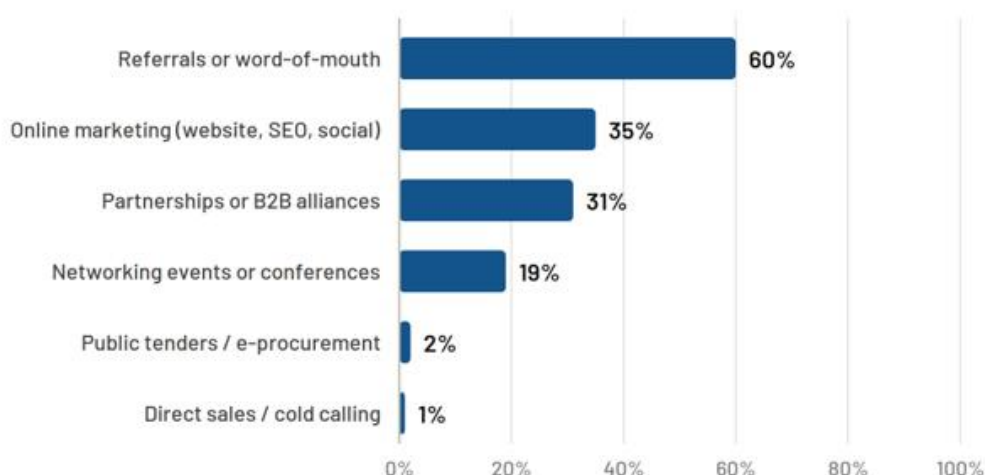
The near-absence of direct sales makes the same point from the opposite direction. Cold outreach requires people whose job it is to do it, and almost no company in the sample has them.

This creates a structural constraint on growth. Referral-based acquisition scales only with the volume of work already delivered, and it tends to reproduce the client base a company already has, technology clients in the same markets, reached through the same networks. It offers little means of entering a new sector or region deliberately. Read against the earlier finding that client industries are concentrated in technology and export markets in three regions, the acquisition model helps explain why that concentration persists, companies grow within their existing networks because they lack the means to reach beyond them.

Partnerships and B2B alliances, at 31%, represent a partial exception. These arrangements can extend a company's reach beyond its own network without requiring a sales function, and their use by close to a third of companies suggests a recognized route around the constraint. Online marketing at 35% functions similarly, though passively, a website that attracts enquiries does not select which markets those enquiries come from.

The 2% figure for public tenders reinforces the earlier finding on government clients. Only 7% of companies count public bodies among their clients, and almost none acquire clients through procurement channels. Whatever the cause, capacity, procurement design, or awareness, public sector work is effectively outside the reach of most of the sector.

Client acquisition channels in 2025



Graph 42: Q25. How did you primarily find new clients in 2025? (n=102)

Section 6: Challenges and Future Outlook

Having established what Kosovo's ICT companies do, who they employ, and where they sell, this section turns to what stands in their way. It covers the difficulties companies encountered during 2025, their exposure to cybersecurity incidents, and their expectations for the period ahead. Where the preceding sections described the sector's structure, this one records how that structure is experienced from inside – which constraints companies identify as binding, and how confident they are about the direction of travel.

Asked to identify their principal challenges in 2025, companies pointed first to demand. Winning new clients or projects was named by 60% of companies, well ahead of every other difficulty. Hiring skilled staff follows at 37%, economic or political uncertainty at 28%, and competition and access to funding at 22% each. Keeping up with technological change was cited by 18%, regulatory or legal obstacles by 6%, cybersecurity threats by 4%, and infrastructure limitations by 2%.

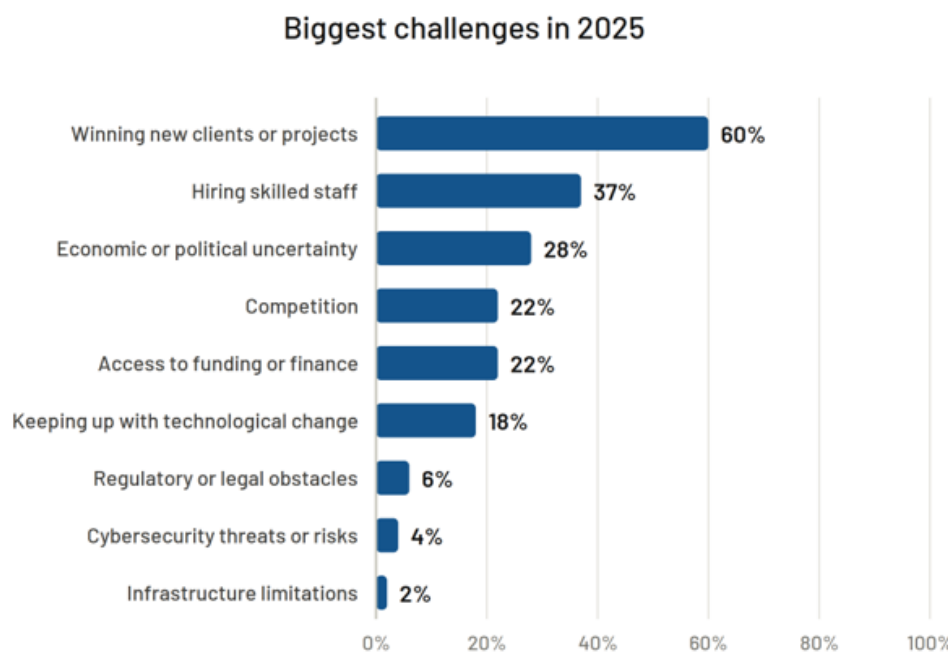
That client acquisition ranks first is significant, and it revises an assumption that has run through much of this report. The skills shortage is real and well documented – nine in ten companies find hiring difficult – but when companies are asked what most constrains them, finding work outranks finding people by a substantial margin. The binding constraint is demand rather than supply.

This connects directly to the acquisition findings in the previous section. Six in ten companies rely on referrals as their primary route to new business, and almost none have dedicated sales capability. A sector that depends on reputation to generate work will naturally experience client acquisition as its central difficulty: the mechanism is passive, and it cannot be scaled deliberately when work is needed.

The two challenges also interact. Companies uncertain of their pipeline are reluctant to commit to hiring, and companies unable to hire cannot take on work that would expand it. For firms of fewer than ten people, where a single additional employee represents a significant fixed cost against uncertain revenue, this circularity is difficult to break.

Economic or political uncertainty, named by 28%, reflects the sector's export orientation as much as domestic conditions. Companies deriving the majority of their revenue from clients in Germany, Switzerland, and the United States are exposed to demand conditions in those markets, over which they have no influence and limited visibility.

The lower-ranked items are as informative as the leading ones. Infrastructure limitations at 2% and regulatory obstacles at 6% indicate that the basic operating environment – connectivity, power, legal framework – is not what holds these companies back. Cybersecurity at 4% is notably low given that 28% of companies offer cybersecurity services and identify it as a hard-to-fill skill; the sector appears to regard it as a market opportunity rather than an internal risk.



Graph 43: Q26. What were your company's biggest challenges in 2025? (n=102)

Company size shapes which challenge companies' experience. The clearest difference concerns recruitment, hiring skilled staff was named by 29% of micro-enterprises, 40% of small enterprises, and 70% of medium-sized companies. Larger firms recruit more frequently and for more specialized positions, so they encounter the shortage more often than firms that may hire only once every few years.

This qualifies how the sector's headline recruitment finding should be read. Nine in ten companies report some difficulty hiring, but when asked to name their most pressing challenges, recruitment features far more prominently among larger employers. For the smallest firms, hiring is difficult but

intermittent; for those approaching fifty employees and beyond, it is a continuous constraint on operations.

Two further gradients follow the same direction. Keeping up with technological change rises from 14% among micro-enterprises to 30% among medium-sized companies, and access to funding from 19% to 30%. Both reflect the demands of operating at scale, a larger firm has more technology to maintain and more capital requirements than a team of five.

Competition moves in the opposite direction, named by 25% of micro-enterprises against 10% of medium-sized companies. The smallest firms compete for the same accessible work, retail clients, subcontracting for other technology companies, in a crowded field, while larger firms operating in health, telecommunications, and finance face fewer direct rivals.

Winning new clients remains the leading or joint-leading challenge at every size, named by 61% of micro-enterprises, 53% of small, and 70% of medium-sized companies. Unlike the others, this constraint does not ease with scale.

Main business challenges in 2025 by company size

	1-9 (Micro-enterprise)	10-49 (Small enterprise)	50-249 (Medium enterprise)
Hiring skilled staff	29%	40%	70%
Winning new clients/projects	61%	53%	70%
Competition	25%	17%	10%
Keeping up with technological changes	14%	20%	30%
Access to funding/finance	19%	27%	30%
Regulatory or legal obstacles	3%	10%	-
Infrastructure limitations (e.g., internet, power)	3%	-	-
Economic or political uncertainty	27%	30%	30%
Cybersecurity threats or risks	3%	7%	-
Product development / Execution	-	-	10%
Service delivery / Industry reputation	-	3%	-

Excludes 2 large enterprises and 1 company that did not disclose headcount, too few to present separately.

Table 11: Q26. What were your company's biggest challenges in 2025? – Presented by Company size

Companies were asked which skills and technologies they expect to be most important five years from now. The answer is close to unanimous. Artificial intelligence and machine learning was named by 93% of companies, the highest level of agreement recorded on any question in this survey.

No other technology approaches it. Advanced cloud computing and data science or big data follow at 36% each, IoT at 26%, Web3 or blockchain and next-generation networking at 18% each, and virtual or augmented reality at 9%.

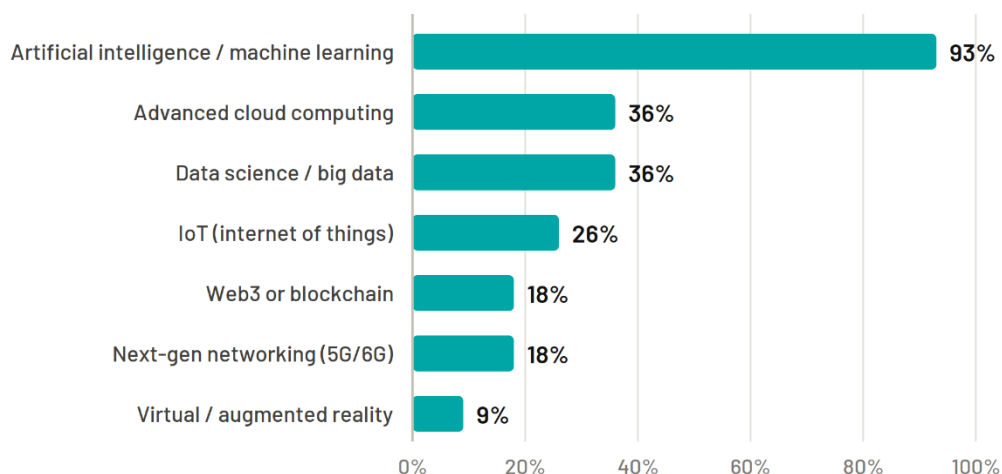
The scale of that consensus is the finding. On almost every other question in this report, companies divide, on the future impact of AI, on export markets, on training investment, on how they acquire clients. Here they do not. Nine in ten identify the same technology as decisive, and the nearest alternative is named by barely a third.

That consensus is worth reading alongside the earlier results on AI's workforce impact, where opinion was genuinely dispersed, 39% expecting augmentation, 31% replacement, 19% new roles, 11% stabilization. Companies agree entirely that AI will matter and disagree fundamentally about what it will do. Certainty about direction coexists with uncertainty about consequence.

The mid-ranking technologies form a coherent group. Cloud computing and data science each at 36% are established capabilities the sector already possesses in part, 40% or more of companies use the major cloud platforms, and a third offer data analytics services. These are extensions of existing work rather than departures from it.

The lower-ranked items are more telling for what they say about the sector's self-definition. Web3 and blockchain at 18%, next-generation networking at 18%, and virtual and augmented reality at 9% attract limited expectation. Kosovo's ICT companies see their future in software, data, and infrastructure, not in the hardware-adjacent or speculative technologies that have attracted attention elsewhere.

5-year skill & tech outlook



Graph 44: Q28. What skills or technologies do you anticipate will be most important in 5 years? (n=102)

Expectations about future technology vary by company size in a consistent way. Artificial intelligence is the exception, named by 95% of micro-enterprises, 90% of small, and 90% of medium-sized companies, it commands the same near-universal agreement regardless of scale.

Beyond AI, the pattern diverges. Advanced cloud computing shows the steepest gradient in the survey, rising from 27% among micro-enterprises to 40% among small and 60% among medium-sized companies. IoT follows a similar though gentler direction, from 25% to 40%. These are

infrastructure technologies whose relevance grows with the scale and complexity of what a company operates.

The speculative technologies move the other way. Web3 and blockchain was named by 20% of micro-enterprises but only 10% of medium-sized companies, and virtual and augmented reality by 14% of micro-enterprises against none of the medium-sized firms. Expectations of these technologies are concentrated almost entirely among the smallest companies.

Future skills and technologies by company size

	1-9 (Micro-enterprise)	10-49 (Small enterprise)	50-249 (Medium enterprise)
Artificial Intelligence / Machine Learning	95%	90%	90%
Web3 or Blockchain	20%	13%	10%
Virtual / Augmented Reality	14%	3%	-
Advanced Cloud Computing	27%	40%	60%
Data Science / Big Data	31%	47%	40%
IoT (Internet of Things)	25%	27%	40%
Next-gen Networking / Telecommunications (e.g., 5G)	14%	23%	10%

Excludes 2 large enterprises and 1 company that did not disclose headcount, too few to present separately.

Table 12: Q28. What skills or technologies do you anticipate will be most important in 5 years? – Presented by Company size

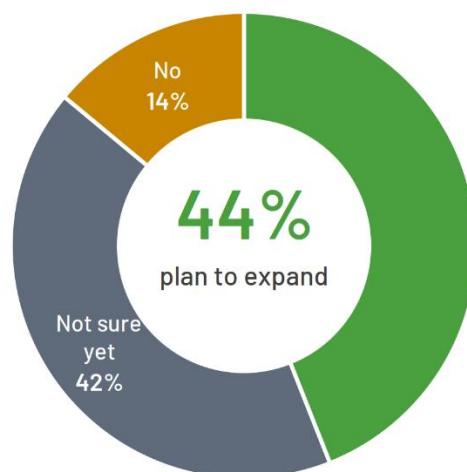
Looking ahead to 2026–2027, 44% of companies plan to expand their services or markets. A further 42% are undecided, and 14% have no expansion plans.

The most striking feature is the size of the undecided group. Companies that have neither committed to expansion nor ruled it out account for almost as large a share as those planning to grow, and together the two groups mean that only one company in seven has definitively closed off the possibility. Ambition in the sector is widespread; commitment to it is not.

That hesitancy is consistent with the constraints documented earlier. Winning new clients is the sector's leading challenge, hiring is difficult, and revenue for most companies is modest. Expansion under these conditions requires committing resources against uncertain demand – a difficult calculation for a firm of fewer than ten people with no dedicated sales function and a client pipeline that depends on referrals. Undecided is a reasonable position when the pipeline cannot be forecast.

The 44% planning to expand is nonetheless a substantial group, and worth reading against the outlook data reported earlier. These are companies operating in a sector where AI adoption is universal, where nine in ten expect AI to be the decisive technology, and where nearly half report it has already changed their workforce needs.

Plans to expand services or markets in 2026–2027



Graph 45: Q29. Do you plan to expand your services or markets in 2026–2027? (n=102)

The 45 companies planning to expand were asked what they intended to pursue. Their answers divide between new markets and new services, and the responses were given in open form rather than selected from a list.

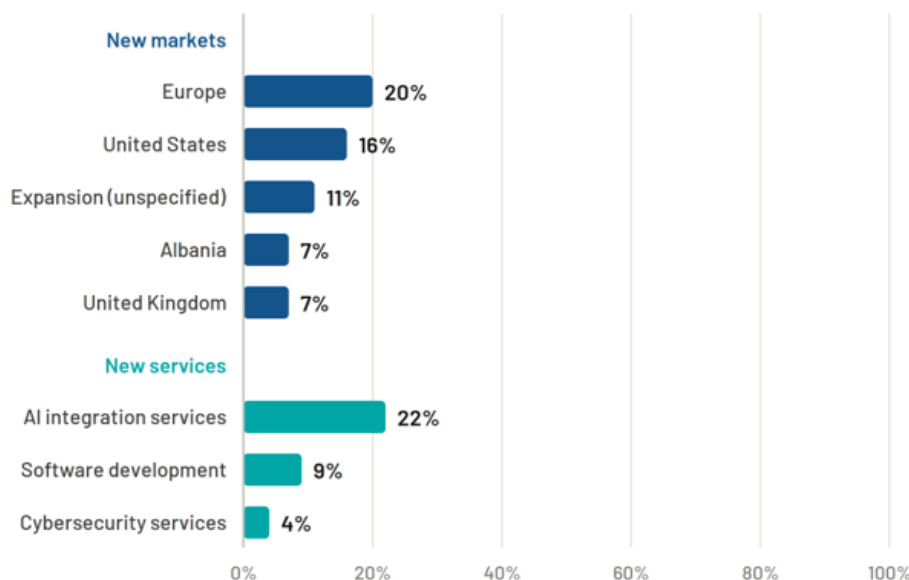
On the market side, Europe is the most common target, named by 20% of these companies, followed by the United States at 16%. A further 11% referred to expansion without specifying a destination, while Albania and the United Kingdom were each named by 7%. On the service side, AI integration services stand out at 22%, the single most frequently named plan of any kind. Software development follows at 9% and cybersecurity services at 4%.

Two things are notable about the market ambitions. The first is that they follow existing patterns rather than departing from them. Europe and the United States are already the sector's principal export destinations, and companies planning to expand are largely proposing to do more of what they already do, in the markets they already know. No company named a destination outside Europe and North America apart from those already served. Given that client acquisition depends overwhelmingly on referrals, this is unsurprising, expansion through existing networks reaches adjacent clients in familiar markets.

The second is the appearance of Albania and the United Kingdom as named targets. Albania offers language and cultural proximity, and the United Kingdom is already served by 20 companies. Both represent incremental extensions rather than new territory for the sector as a whole.

The service ambitions tell a different story. AI integration services being the most frequently named plan represents a genuine shift in positioning. Companies are proposing not simply to use AI internally, which all of them already do, but to sell AI capability as a service to clients. Read against the finding that 93% expect AI to be the decisive technology of the next five years, this is the commercial expression of that expectation.

New services and markets planned for 2026-2027



Graph 46: Q30. What new services or markets do you plan to pursue? (n=45)

Two-thirds of companies (66%) reported no cybersecurity incidents during 2025. Among the third that did, phishing and social engineering attempts were the most common, affecting 19% of all companies, followed by malware or virus infections (11%), unauthorized system access (9%), and DDoS attacks (8%). Ransomware affected 3%, and data breaches and insider threats 2% each.

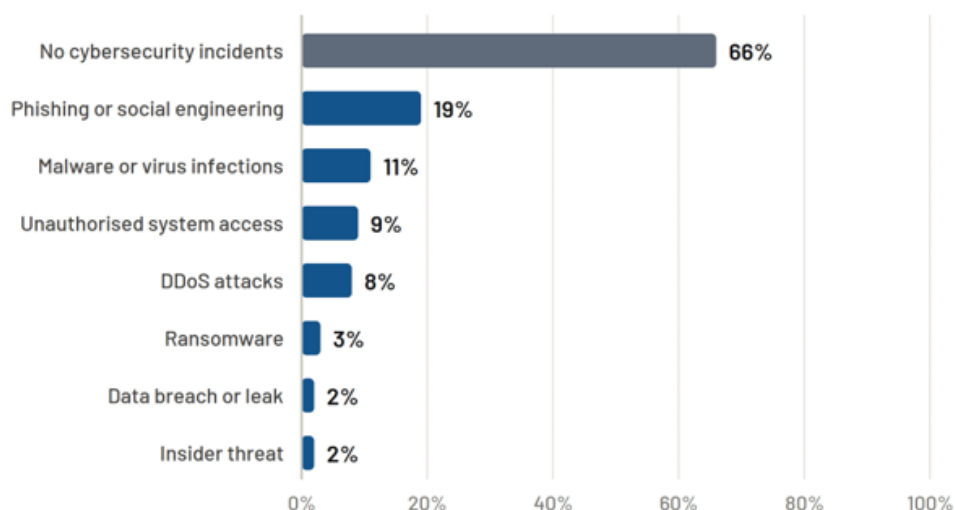
This sits oddly against how companies assess their own risks. Asked earlier in this section to name their biggest challenges of 2025, only 4% identified cybersecurity threats, placing it second from bottom, ahead of only infrastructure limitations. Yet a third of companies experienced at least one incident during the same year, and those affected averaged one and a half incident types each. Companies were roughly eight times more likely to have been attacked than to regard cybersecurity as a significant business problem.

Several readings are possible. Incidents may be routine and successfully handled, in which case low concern reflects competence rather than complacency, phishing attempts, the most common category, are a constant feature of business operations and are frequently blocked. Alternatively, attention may simply be directed elsewhere, with client acquisition and hiring pressing on companies daily, security recedes until something goes wrong. The survey does not distinguish between these, and both may hold for different firms.

What the distribution does show is that incidents are concentrated at the lower-severity end. Phishing attempts and malware infections, the two leading categories, are opportunistic and largely automated. The more damaging categories, ransomware, data breaches, insider threats, remain rare, each affecting 3% or fewer. The sector is being probed constantly but not, on this evidence, being seriously compromised.

These findings carry particular weight given how the sector is positioned. Cybersecurity services are offered by 28% of technology companies, and cybersecurity skills are the second hardest to recruit. Companies selling security capability to clients while treating their own exposure as a minor concern occupy an awkward position, one that becomes harder to sustain as export clients in regulated European markets increasingly require demonstrable security practices from their suppliers. That 35% of companies hold ISO 27001 certification suggests part of the sector already recognizes this.

Cybersecurity incidents in 2025



Graph 47: Q27. Did your company face any of the cybersecurity issues in 2025? (n=102)

Section 7: Support and Collaboration

The preceding sections have documented a sector that struggles to recruit, invests modestly in developing its own staff, and expects artificial intelligence to reshape the roles it needs. This final section examines the relationships through which those pressures might be addressed, with the educational institutions that supply the sector's talent, with the Dual VET program due to begin in September 2026, and with government. Where earlier sections described what companies do on their own account, this one considers what they do in collaboration with others, and where those connections are currently absent.

Collaboration with Educational Institutions

Fewer than a third of companies (30%) collaborated with educational institutions during 2025. Seven in ten did not.

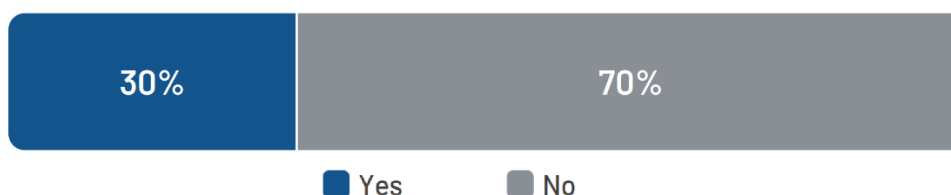
Set against the sector's own account of its difficulties, this is a striking result. Nine in ten companies report difficulty hiring skilled staff. Two in five identify specific programming languages as their

hardest recruitment area. Fewer than three in ten invest regularly in developing the staff they already have. The institutions that produce the sector's future workforce are, for most companies, not part of how they respond to any of this.

The explanation lies partly in the structural constraints documented throughout this report. Collaboration requires capacity that most companies do not have, someone to maintain the relationship, supervise students, contribute to curriculum discussions, or host visits. In firms where six in ten employ fewer than ten people and close to one in five have no non-technical staff whatsoever, this work falls to the same individuals responsible for delivery and business development. Engagement with education is an investment whose returns arrive years later, competing against pressures that are immediate.

The consequences extend beyond individual firms. A sector that does not engage with the institutions supplying its workforce has limited means of signaling what it needs, and those institutions have limited means of knowing. The gap between what education produces and what employers require, a recurring theme in assessments of Kosovo's labor market, is unlikely to narrow while the two sides remain largely unconnected.

Collaboration with educational institutions in 2025



Graph 48: Q31. Did your company collaborate with any educational institutions in 2025? (n=102)

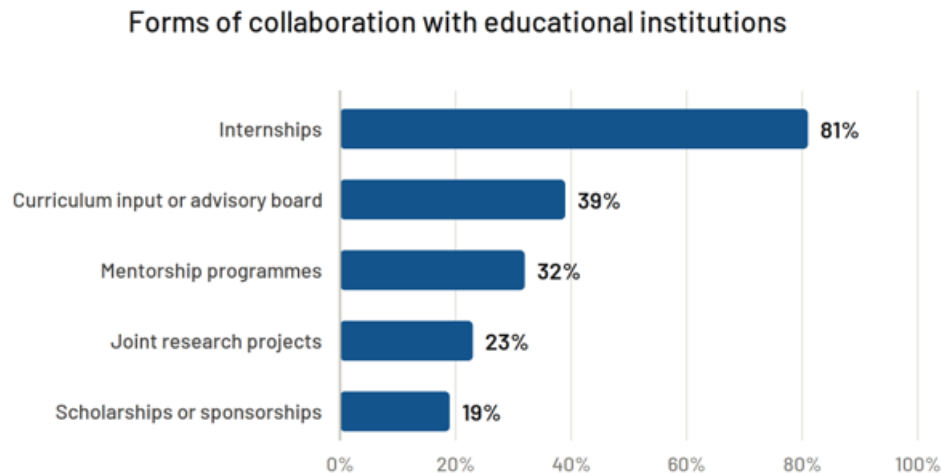
Among the 31 companies that did collaborate, internships are by far the most common arrangement, reported by 81%. Curriculum input or participation in advisory boards follows at 39%, mentorship programs at 32%, joint research projects at 23%, and scholarships or sponsorships at 19%.

The dominance of internships is unsurprising. They are the most direct form of engagement, requiring no institutional agreement beyond accepting a student, and they carry an immediate return, a company gains a working pair of hands and an opportunity to assess a potential recruit before committing to a hire. For firms whose principal difficulty is finding skilled staff, internships function as a recruitment channel as much as an educational one.

More notable is that 39% of collaborating companies contribute to curriculum design or sit on advisory boards. This is a qualitatively different form of engagement, it shapes what students learn rather than absorbing them once trained, and it is the mechanism through which employer requirements can influence the education system directly. That around one in eight companies across the whole sample does this represents a small but meaningful channel of influence, particularly given the frequency with which curriculum relevance is identified as a weakness in Kosovo's skills system.

That companies collaborating do so in an average of nearly two ways suggests engagement, once established, tends to deepen. Firms that host interns often go on to contribute to curriculum or mentor students. This is characteristic of relationship-based engagement, the initial connection is the difficult step, and subsequent forms follow more readily.

Read against the previous finding, the picture is one of narrow but substantive engagement. A minority of companies work with educational institutions, but those that do are not merely accepting students passively, a substantial share is actively involved in shaping provision. The constraint is the number of companies participating rather than the depth of their participation.



Graph 49: Q32. In what ways did you collaborate? (n=31)

Dual VET Program

Dual Vocational Education and Training combines classroom-based learning with paid practical training inside a company, and a program is due to begin formally in September 2026. Companies were asked whether they had heard of the concept, whether they would consider taking part, and how effective they judged such program would be.

Awareness is limited. Fewer than four in ten companies (39%) had heard of Dual VET; 61% had not.

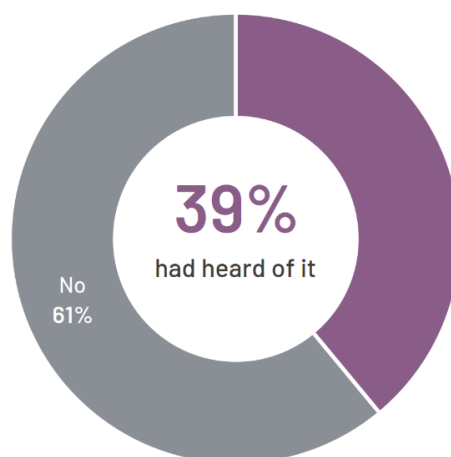
This is the first and most immediate obstacle. A program launching in September 2026 that depends on employer participation currently reaches a minority of the sector it needs. Six in ten ICT companies do not know the concept exists, which means they are not weighing its merits, not planning for it, and not in a position to be recruited into it.

The awareness figure also sets a ceiling on everything that follows. Because the question on willingness to participate was asked only of those who had heard of the program, it describes 40 companies rather than 102. Any assessment of employer readiness therefore rests on the aware minority, and the intentions of the remaining 62 companies are unknown.

Awareness at this level is consistent with the collaboration findings reported above. Seven in ten companies maintain no relationship with educational institutions, and those are precisely the channels through which knowledge of a program like this would ordinarily travel. A company already hosting interns or sitting on an advisory board is positioned to hear about Dual VET; a company with no such connection is not.

The practical implication is that the programs first constraint is communication rather than persuasion. Before employer willingness can be tested at scale, the majority of the sector needs to know the program exists, and the sector's existing institutional connections are too thin to carry that message on their own.

Awareness of the Dual VET concept



Graph 50: Q33. Have you ever heard of the Dual VET (dual vocational education) concept that combines classroom -based learning with paid, practical training in a company at the same time? (n=102)

Awareness of Dual VET is closely related to company size, and the relationship is stark. Among micro-enterprises, only 22% had heard of the concept. This rises to 57% among small enterprises and 80% among medium-sized companies, with both large enterprises aware of it.

This locates the awareness gap precisely. Micro-enterprises account for 46 of the 62 companies that had never encountered Dual VET, and since they constitute close to six in ten firms in the sector, the low overall awareness figure is largely a reflection of their position. Among companies employing ten or more people, awareness is the majority position rather than the exception.

The pattern is consistent with the collaboration findings reported earlier. Engagement with educational institutions requires capacity that the smallest firms rarely have, and it is through such channels that knowledge of a program like this ordinarily travels. Companies with no institutional relationships are also the companies least likely to hear about a program delivered through them.

The finding carries a direct implication for how Dual VET is introduced to the sector. The companies that know about the program are largely those with the staff and structure to host an apprentice;

those that do not are the firms for which hosting would be most demanding. Extending awareness to micro-enterprises addresses only part of the problem, since reaching them raises the further question of whether participation is practicable at that scale.

Dual VET program awareness by company size

	Aware	Not aware
1-9 (Micro-enterprise)	22%	78%
10-49 (Small enterprise)	57%	43%
50-249 (Medium enterprise)	80%	20%
250 or more (Large enterprise)	100%	-

Table 13: Q33. Dual VET program awareness – Presented by Company size

Among the 40 companies that had heard of Dual VET, a third (32%) would consider participating in the program, 58% are undecided, and 10% would not. In absolute terms these represent 13, 23, and 4 companies respectively – or, expressed against the full sample, 13% of all ICT companies surveyed would currently consider taking part.

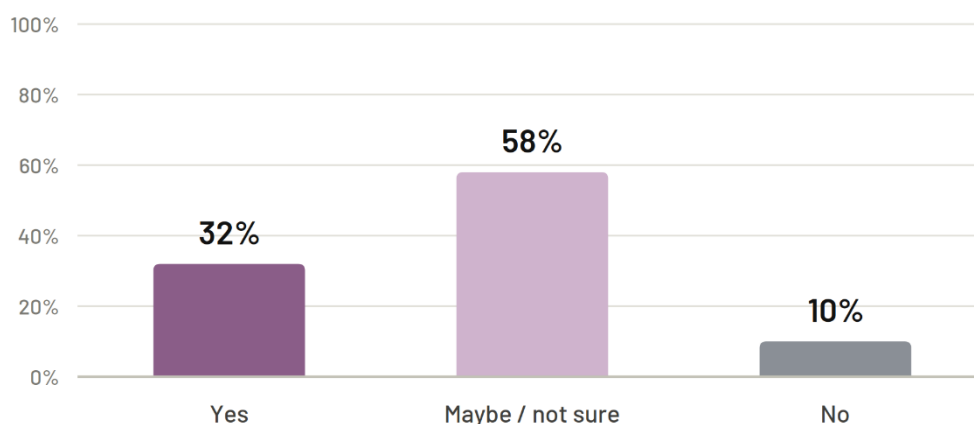
The most useful reading is that outright refusal is rare. Only four companies among those aware of the program ruled out participation. Nine in ten are either willing or open to persuasion, which indicates that resistance is not the obstacle. Companies are not rejecting Dual VET; most simply have not yet decided.

The size of the undecided group is where the opportunity lies. At 58%, it is nearly twice the size of the committed group, and its composition matters. These are companies that know what Dual VET is and have not dismissed it, but require something further before committing – most plausibly clarity about what participation involves in practice: the time commitment, the supervision required, the cost, and what the company receives in return. For a firm of fewer than ten people, these are decisive questions, and undecided is a rational position while they remain unanswered.

The context established earlier suggests the underlying disposition is favorable. Internships are already the dominant form of educational collaboration, reported by 81% of collaborating companies. Dual VET is a structured and longer version of an arrangement much of the engaged part of the sector already operates. The program is not asking companies to adopt an unfamiliar practice so much as to formalize one – which is a considerably easier proposition.

Two constraints qualify this. The first is arithmetic: 13 committed companies and 23 undecided ones out of 102 surveyed is a narrow base from which to launch, and it follows directly from the awareness problem rather than from any judgement about the program itself. The second is capacity. Hosting an apprentice requires someone to supervise them, and in a sector where most companies employ fewer than ten people and nearly one in five has no non-technical staff, mentoring capacity is a real constraint rather than a formality.

Willingness to participate in a Dual VET program



Graph 50: Q34. Would your company consider participating in a Dual VET program that will officially start from September 2026? (n=40)

Asked how effective Dual VET program would be at preparing skilled employees for the ICT sector, companies were broadly positive. A third (34%) judged them very effective and 35% somewhat effective, giving a combined 69% who expect a positive contribution. Only 7% considered them not very effective, while 24% had no opinion.

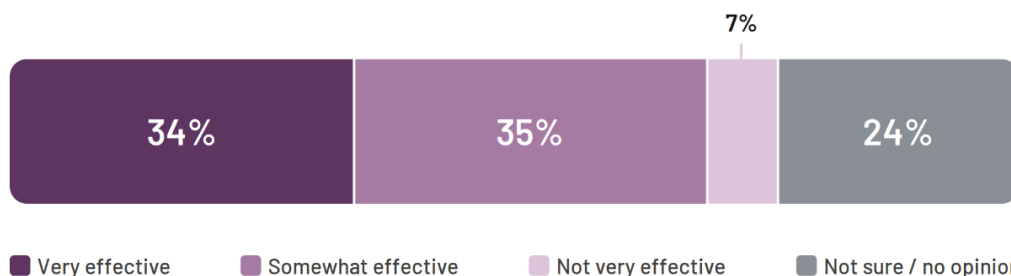
Unlike the preceding question, this one was put to all companies, including the 61% who had not heard of Dual VET before the survey. The concept was defined in the question itself, so respondents were assessing the idea rather than a program they knew. This makes the result a measure of receptiveness to the approach rather than an evaluation of the initiative, and it largely explains the 24% expressing no opinion.

The scale of the positive response is nonetheless notable. That seven in ten companies expect the model to work, in a sector where most had never encountered it, indicates the underlying logic is intuitive to employers. Combining classroom instruction with paid workplace training addresses a problem the sector has described throughout this report, graduates arriving without practical capability, and companies unable to find people who can contribute quickly.

Sceptics are few. At 7%, those judging the approach ineffective amount to seven companies, and there is no substantial constituency arguing that Dual VET is the wrong response to the sector's skills problem. Taken with the earlier finding that only four aware companies ruled out participation, the pattern is consistent, the obstacles to Dual VET in Kosovo's ICT sector are informational and practical rather than a matter of employers being unconvinced.

Read across the three questions, a coherent picture emerges. Most companies do not know the program exists. Those who do are overwhelmingly open to it, and the sector as a whole believes the approach would work. The distance between 69% who think Dual VET is effective and 13% who would currently consider taking part is not a measure of skepticism but of everything that stands between an idea companies find persuasive and a commitment they are ready to make.

Perceived effectiveness of Dual VET for the ICT sector



Graph 51: Q35. In your opinion, how effective would Dual VET programs be at preparing skilled employees for the ICT sector? (n=102)

Government and Institutional Support

The final questions in this section address the relationship between ICT companies and the institutions charged with supporting them.

Contact is limited. Just 15% of companies received any form of government or institutional support during 2025; 85% received none.

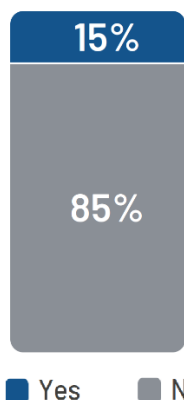
Three-quarters of companies in this sector export, and the sector is widely regarded as a priority for economic development. Against that, a 15% rate of institutional support is low. Whatever mechanisms exist are reaching roughly one company in seven.

Of the 15 companies that received support, 13 received grants. Two participated in the Superpuna program, one received tax incentives or reductions, and one received mentorship or consulting. Grants are, in practice, the only instrument the sector encounters at any scale.

This concentration is worth examining. Grants are one-off, competitive, and require an application process, they suit companies with the administrative capacity to identify opportunities and prepare submissions. In a sector where most firms employ fewer than ten people and close to one in five have no non-technical staff at all, that capacity is unevenly distributed, and it is plausible that the mechanism itself filters who can access it. The near-absence of tax incentives, which require no application and reach companies automatically, is notable by contrast.

Read alongside the earlier findings on public sector clients, a consistent pattern appears. Only 7% of companies count government among their clients, 2% acquire clients through public tenders, and 15% receive institutional support. Across three separate measures, the relationship between Kosovo's ICT sector and its public institutions is thin.

Government or institutional
support received in 2025



Graph 52: Q38. Did you receive any government or institutional support in 2025? (n=102)

Forms of support received



Graph 53: Q39. In what form was the support? (*n=15)

Asked what support would most help them grow in 2026–2027, companies placed networking opportunities first, cited by 45%, closely followed by grants and subsidies at 42%. Investment funding and tax incentives were each named by 25%, and training programs by 10%.

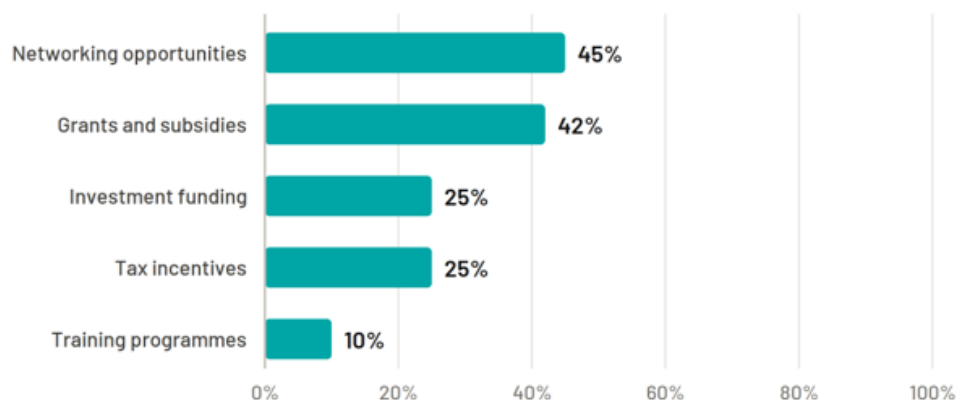
This indicates substantial demand for both market connections and financial assistance. The two are not alternatives; a company able to reach new clients still needs capital to service them, and the closeness of the figures suggests companies experience both as live constraints rather than ranking one above the other.

Financial support nonetheless remains substantial in aggregate. Grants and subsidies (42%), investment funding (25%), and tax incentives (25%) together indicate widespread demand for capital, though it is divided across three quite different instruments. Grants suit specific projects, investment funding suits growth, and tax incentives reduce operating costs without an application process. The spread suggests companies are at different stages with different needs, rather than a single financing gap running through the sector.

The low figure for training programs, at 10%, requires care in interpretation. It sits awkwardly beside the finding that nine in ten companies struggle to hire skilled staff. One reading is that companies do not regard external training programs as the solution to a shortage they experience as a market-wide scarcity of experienced people, rather than a gap that short courses can fill. The survey does not establish which explanation holds, but the gap between the intensity of the skills problem and the modest demand for training support is worth noting.

Taken together, these priorities describe a sector seeking practical means to grow within its existing model: routes to clients, capital, and lower operating costs. Support that would reshape how companies work, such as training programs, attracts markedly less demand.

Support that would help companies grow in 2026–2027



Graph 54: Q40. What type of support would help your company grow in 2026-2027? (n=102)

Conclusions

Kosovo's ICT sector in 2025 presents a picture of a young industry performing well against a low national baseline while facing constraints that have not eased and, in some respects, have tightened. The findings support six broad conclusions.

A structurally young sector, still concentrated in one city. Close to eight in ten companies have been operating for a decade or less, six in ten employ fewer than ten people, and 76% are based in the Prishtinë region. This composition is not incidental to the sector's difficulties, it explains most of them. Micro-enterprises recruit episodically, absorb administrative functions into technical roles, and weigh every investment against immediate delivery pressure. Regional ecosystems outside the capital remain thin, and the growth of fully on-site working, which nearly doubled over the year, has narrowed one of the few mechanisms available for broadening the sector's talent pool geographically.

Artificial intelligence has completed its adoption and begun to reshape roles. Every company surveyed used AI tools during 2025, and the category of non-users, which represented close to one company in ten in the previous edition, has disappeared entirely. Adoption is deepest where the sector's core work lies: code generation and debugging are the most common applications recorded anywhere in the survey. Nearly half of companies report that AI has already reduced their need for certain roles, and where it has, the effect falls overwhelmingly on intern and junior positions. Notably, this is not uniformly elimination, in a substantial share of cases the required skill set changed rather than the position disappearing. On the technology's importance the sector is close to unanimous, with 93% naming AI as decisive for the next five years; on its consequences for employment, opinion divides four ways.

The talent constraint falls hardest on the firms doing most of the hiring. Recruitment difficulty has risen in each successive edition of this Barometer, reaching nine in ten companies in 2025, and the difficulty has broadened from two technical specialisms into a general condition affecting technical, security, design, and marketing roles alike. It is not, however, experienced evenly. When asked to name their most pressing challenges, 70% of medium-sized companies cited hiring skilled staff, against 40% of small enterprises and 29% of micro-enterprises. For the smallest firms hiring is difficult but intermittent; for larger employers it is a continuous constraint on operations. Meanwhile the response to the shortage has weakened rather than strengthened, regular investment in developing existing staff has fallen, and training expenditure is concentrated at the lowest levels among precisely the firms least able to afford it, with no micro-enterprise spending above €5,000 across the year and seven in ten spending €3,000 or less. The contraction of entry-level work compounds this, since the roles through which people acquire experience are the roles AI is reshaping first.

Client acquisition is felt across the sector and does not ease the growth. Winning new clients or projects was among the most frequently named difficulties, and it stands out for a different reason than its frequency, unlike other challenges, it does not diminish as companies grow. It was named by 61% of micro-enterprises, 53% of small, and 70% of medium-sized companies, whereas difficulties such as competition fall away with scale and others, such as recruitment, intensify. How the sector

sells offers some context. Six in ten companies depend on referrals as their principal route to new business, almost none have dedicated commercial staff, and public procurement is effectively inaccessible. Referral-based acquisition scales only with work already delivered and tends to reproduce the client base a company already has, which is consistent with the concentration observed elsewhere in this report, in technology clients and in three export regions.

Export success rests on a narrow and subordinate base, and grows with scale. Three-quarters of companies export, an exceptional rate for any sector in Kosovo's economy, and this underpins the salary levels the sector sustains. Export capacity is closely tied to size, however, rising from 66% among micro-enterprises to 83% of small and 90% of medium-sized companies, with non-exporters overwhelmingly concentrated among the smallest firms. The client profile points in the same direction, 70% of companies serve technology clients, indicating that much of the sector operates as a subcontractor to firms holding the end-client relationship, while the industries requiring domain expertise and offering higher value, health, telecommunications, automotive, and finance, are served principally by companies that have reached scale. Moving up the value chain and growing in headcount appear to be the same process. Three regions account for the substantial majority of export activity, leaving the sector exposed to demand conditions it cannot influence.

The relationship with public institutions is thin, and thinnest where it matters most. Only 15% of companies received institutional support, 7% count public bodies among their clients, 2% acquire clients through tenders, and 30% work with educational institutions. Support that does reach the sector is concentrated almost entirely in grants, an instrument that favors companies with administrative capacity to apply. Dual VET illustrates the pattern precisely. Awareness of the program stands at 22% among micro-enterprises against 80% among medium-sized companies, meaning the firms least connected to institutional channels are also those least likely to have heard of a program delivered through them. Yet among companies aware of it, only 10% rule out participation, and 69% of the full sample expect the approach to be effective. The obstacle is not employer resistance but the absence of the channels through which such a program would reach the sector's smallest firms.

Taken together, these findings describe a sector that has grown capable without growing robust. It has adopted new technology faster than the institutions around it, achieved export penetration that most of Kosovo's economy has not, and improved pay across every function. It remains, however, composed of small firms with thin support structures, dependent on passive client acquisition, exposed to a narrow set of markets, and largely disconnected from the educational and institutional infrastructure that would allow it to consolidate those gains. The clearest single pattern running through this edition is that the sector's constraints are not uniform, at almost every point where the data permit a breakdown by company size, the smallest firms are the least connected, the least supported, and the least equipped to act on the opportunities the sector as a whole is capturing.

Kosovo's ICT sector in 2025 presents a picture of a young industry performing well against a low national baseline while facing constraints that have not eased and, in some respects, have tightened.

Recommendations

The findings of this Barometer point to a sector whose constraints are structural rather than incidental, and which require coordinated action from industry, educational institutions, government, and development partners. Six areas warrant priority attention.

1. Reach micro-enterprises directly with Dual VET information, and design for their capacity

With the program due to begin in September 2026 and 61% of ICT companies unaware that it exists, communication is the immediate priority. The awareness gap is not evenly distributed, 80% of medium-sized companies have heard of Dual VET, against only 22% of micro-enterprises, which account for 46 of the 62 companies that had never encountered it. Outreach conducted through STIKK membership, sector events, and institutional networks will largely reach companies that are already aware. Reaching the remainder requires direct contact with firms outside those networks, using business registry data, municipal business associations, and channels that do not presuppose an existing institutional relationship.

Awareness alone will not be sufficient. The companies that know about the program are largely those with the staff and structure to host an apprentice; those that do not are the firms for which hosting would be most demanding. Program design should therefore account for participation at very small scale, including shared or rotating placements between companies too small to host an apprentice alone, and clear guidance on the time commitment, supervision expected, and financial arrangements involved. Among companies already aware, 58% remain undecided rather than opposed, and it is this specific information they lack.

2. Rebuild the entry-level pathway around what AI has not automated

The finding that AI's workforce impact falls overwhelmingly on intern and junior roles requires a considered response rather than a defensive one. The evidence suggests the entry level is being redefined rather than closed, in a substantial share of affected companies, the required skill set changed rather than the position disappearing.

Educational and training provision should be revised accordingly. Curricula built around producing graduates who can perform routine coding, documentation, and basic content production are preparing people for work that is being automated. What the sector now requires at entry level is the capacity to direct, evaluate, and correct AI-generated output, which demands stronger foundations in system design, code review, testing, and critical judgement than a conventional junior role has assumed. Dual VET is well positioned to deliver this, since the capabilities involved are learned through supervised practice rather than instruction alone.

3. Strengthen routes to market alongside financial support

Client acquisition was among the most frequently named difficulties, and it is the one that does not diminish as companies grow, affecting firms of every size. When asked what would most help them grow, companies pointed to networking opportunities and to financial support in roughly equal measure. Both warrant attention, and market access is the area where provision is currently thinnest.

Trade missions, B2B matchmaking, and structured introductions to buyers in the DACH region and North America would address a constraint companies report widely. Because referral-based acquisition reproduces existing client bases, deliberate intervention is the most realistic route into new sectors or regions for firms without commercial staff. Support of this kind also serves a workforce purpose: companies uncertain of their pipeline are unlikely to hire, and the relationship between weak demand and constrained recruitment is one that external market access could help break.

4. Broaden institutional support beyond grants

Of the 15 companies receiving support in 2025, 13 received grants. Grants require identification of opportunities, preparation of applications, and administrative follow-through, capacity that is unevenly distributed in a sector where close to one in five companies has no non-technical staff at all. The instrument itself filters who can access it, and it does so in the same direction as every other gradient in this report, against the smallest firms.

Mechanisms that reach companies without an application process, such as tax incentives tied to training expenditure or employment of apprentices, would extend support to firms currently outside its reach. Simplifying application requirements for smaller grants, and providing application assistance through STIKK or similar intermediaries, would widen access to the instrument that already dominates.

5. Target training support at the firms that cannot currently afford it

Two-thirds of companies invest in training, but the level of investment is closely tied to size. Among micro-enterprises investing in training, seven in ten spent €3,000 or less across the year and none spent above €5,000, while among medium-sized companies none spent below €1,000 and half spent more than €5,000. The obstacle is structural, for a company of five people, releasing one person for a week removes a fifth of its delivery capacity, and the cost is borne twice, in fees and in foregone billable time.

Subsidized training that compensates for time as well as cost would address the constraint as companies actually experience it, and should be directed specifically at firms below ten employees, where the gap is concentrated. Provision should focus on the areas the sector identifies as hardest to recruit, programming across several stacks, cybersecurity, and data and AI capability, and be structured so that participation does not require withdrawing staff from delivery for extended periods.

6. Extend the sector's reach beyond Prishtinë and beyond its current leadership profile

Two forms of concentration limit the sector's development. Geographically, 78% of companies operate from the capital, and the growth of fully on-site working has reduced the flexibility that allowed remote recruitment from other regions. Encouraging flexible working arrangements, and directing business development support toward companies outside Prishtinë, would help build regional ecosystems that remain thin.

The second concerns progression. Women hold 36% of positions in technology companies and a majority in creative services, yet only 12% of the individuals who represented their companies in this

survey were women. While a single respondent per company cannot establish the gender composition of the sector's leadership, the contrast is marked enough to warrant attention, and the question of women's progression into senior technical and management roles would merit dedicated measurement in a future edition.

The findings of this Barometer point to a sector whose constraints are structural rather than incidental, and which require coordinated action from industry, educational institutions, government, and development partners.