



E3 Consulting Ltd. Montenegro
Energy-Ecology-Economy

PROJECT
South-East Europe IT Industry Barometer (SEE ITIB) 2015

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PROJECT TEAM:

MSci Milica Dakovic
Project supervision

Ivana Jankovic
Project coordinator

MSci Gojko Dakovic
IT Analyst

Aleksandra Popovic
Economic Analyst

Maida Muratovic
Researcher

Milos Scepanovic
Researcher



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1. EXECUTIVE SUMMARY

In 2014 it was developed a unique methodology as a basis for realization of the first IT Industry Barometer in South East Europe SEE ITIB 2014. The main purpose of such project was to provide information and in-depth analysis of internal resources, capacities, as well as external market analysis between six Western Balkan countries and their IT associations. For such project a common questionnaire was developed, and it has served for the data collection process.

In 2015, the project was continued on the basis of the same methodology and given the results of the national IT reports in the target countries regional analysis has been prepared.

Analysis showed that ICT companies within all targeted countries are dominantly in domestic ownership, are members some ICT Associations, and mostly oriented towards software and IT services. Mostly used operating system is Windows, with strong presence of Linux usage. Looking into programming languages it was found that most represented are Java/JavaScript and .NET, but in Montenegro companies also use C++ and in Kosovo they use very often HTML. As for database technologies Albania, Macedonia and Kosovo use MSSQL, Serbia mSQL/MySQL and in Montenegro they dominantly use SQL.

Most of the companies in targeted countries do business for international clients within their countries. That number is the highest in Albania and it is the lowest in Kosovo, but in terms of export most active are companies from Serbia and least active are those from Montenegro. Analysis has shown that in average companies see their core competitive advantage in price, quality and technical know-how. Looking into companies view of potential interesting foreign markets there was a lot of differences between countries. For Montenegro regional market is most interesting, Serbian companies share that view but they see high potential in North American market. Macedonia also sees potential in North American market, but for Kosovo and Albania greatest potential is seen in German market. One of most important things is how are export barriers seen by the companies and analysis shown that as highly problematic are seen lack of government support and lack of branding of local IT industry abroad.



Sales analysis for previous two years and projection for 2015 could be done only for Serbia and Montenegro due to date availability. Analysis has shown that there was a slight decrease of percentage of companies having sales turnover up to 1 million euro in 2014 from 2013 in both countries, but at the same time there was more companies in categories of sales more than 10 million euro (Montenegro) and up to 5 million euro (Serbia). In both countries forecasts for 2015 are considering growth of the companies within categories of sales up to 1 million and up to 5 million euros.

Very important subject for every company business and strategies are its employees, and that also applies for ICT companies. Analysis shows that these companies, in all targeted countries, plan expansion in terms of employing additional people and that they are in most cases faced with turnover of people within one year span. These people need to be replaced and 3 months adjustment period is something that company has to expect in that process of replacement.

Last part of analysis is focusing additionally on employees and their salaries within ICT industry. First it is shown that among highest paid jobs are Developers, Project Managers and System Administrators. Also in almost all countries (Montenegro is exception) the plan increases of number of employees in average for 10%. At the same time for IT experts it is forecasted approximate 10% increase of salaries, while for the other employees in those companies no change in salary is forecasted. While doing projections and plans these companies as major negative impact see national economic situation, and as major positive impact intensified competition. Also majority see „brain drain“ negatively influencing their business, especially in Macedonia and Albania, because it creates lack of skilled/qualified workforce.



2. INTRODUCTION

Information and Communication Technologies (ICT) represents one of the most important drivers of innovation, growth and competitiveness of national economies worldwide. As a direct result of current economic necessities and ongoing technological developments, the ICT industry is undergoing a number of fundamental challenges. In order to remain relevant to their clients and customers, it is increasingly important for businesses to monitor developments closely, adapting essential products and services to meet new marketplace demands.

The project "South East Europe IT industry barometer" (SEE ITIB) represents the project which main goals are to support the export capacity of ICT companies in South East Europe. The project aims to collect basic information on ICT companies in the Western Balkan region and to provide an insight into the value of the national ICT market as well as their competitiveness. The project included five countries: Montenegro, Albania, Kosovo, Macedonia and Serbia.

The project SEE ITIB is realized on the basis of the methodology of the first IT Industry Barometer in South East Europe that was conducted in 2014. This study is providing information and in-depth analysis of internal resources, capacities as well as external market analysis between five Western Balkan countries and their IT associations.

Report SEE ITIB represents regional analysis based on the data that are previously collected in five targeted countries and contains following:

- General state overview on IT development in the region based on previous national IT analysis in each targeted country and its national characteristics and trends;
- Comparative analysis for five targeted countries;
- Recent export trends between targeted countries;
- Analysis of Human Resources;
- Qualitative analysis on recent trends in IT industry with recommendations.

Additionally, SEE ITIB report is providing qualitative analysis on recent trends in ICT within targeted countries with main conclusions and recommendations for its further development in the future.



3. PROJECT METODOLOGY

The report contains comparative analysis of the recent trends in ICT sector among five targeted countries with the special focus on their export capacities and practices. In order to reach project goals it was implemented comparative analysis that is providing in-depth analysis of the development level of the IT industry between the targeted countries. Comparative analysis (benchmarking) represents a method used in qualitative analysis based on cross-national research on specific area (IT industry) and represents a method that is 'connecting' quantitative and qualitative analysis on targeted topic. Comparative analysis is based on the quantitative analysis of variable presented within the questionnaire and desk analysis on recent ICT trends for 2015.

Quantitative analysis was realized based on the survey conducted among that targeted enterprises in five targeted state. The survey included 126 enterprises precisely 50 enterprises from Montenegro, 40 from Kosovo, 20 from Serbia, 7 from Macedonia and 9 from Albania. Because of relatively small sample for Serbia, Macedonia and Albania survey results for those countries might be biased. Sample of ICT companies from Montenegro is representative and defines real status of Montenegrin ICT market. The Survey has been realized by pre-defined online questionnaire except in case of Montenegro where has been realized through direct interviews.

The questionnaire consisted of 35 questions divided into five different sections:

Section 1: General information about the company;

Section 2: Export;

Section 3: Statistics;

Section 4: Human Resources;

Section 5: Projections.

Project results are prepared in the form of the report that contains qualitative and comparative analysis of recent IT industry trends in 2015 between five Western Balkan countries by presenting their state-of-art in the field of ICT and export as well as by providing key recommendations for its further development.



CHAPTER 1: RECENT ICT TRENDS IN WESTERN BALKAN COUNTRIES¹

“ICTs act as a vector of social development and transformation by improving access to basic services, enhancing connectivity, and creating employment opportunities. In these ways ICTs affect how people live, communicate, interact, and engage among themselves and with their governments”².

Starting from 2001, the World Economic Forum launched the Global Information Technology Report series and the Networked Readiness Index (NRI) in order to address importance of ICT and its influence on business activities as well as to provide recommendations to policy makers in order to improve existing ICT performances on a national level. WEF Report from 2015 contains brief analysis on the countries covered in ITIB2015 (Montenegro, Serbia, Macedonia and Albania)³.

NRI is representing a composite indicator that is consisted of main four categories, such as: Environment sub index, Readiness sub index, Usage sub index and Impact sub index. These sub-indexes are divided into following categories:

A. Environment sub index

1. Political and regulatory environment (9 indicators)
2. Business and innovation environment (9 indicators)⁴

B. Readiness sub index

3. Infrastructure (4 indicators)
4. Affordability (3 indicators)
5. Skills (4 indicators)

C. Usage sub index

6. Individual usage (7 indicators)
7. Business usage (6 indicators)
8. Government usage (3 indicators)

D. Impact sub index

9. Economic impacts (4 indicators)
10. Social impacts (4 indicators)

¹ Montenegro, Serbia, Kosovo, Albania, Macedonia

² WEF, Global Information Technology Report, 2015

³ Note: Kosovo is not included into WEF 2015.

⁴ The Business usage pillar captures the extent to which businesses in a country use the Internet for business-to-business and business-to-consumer operations, as well as their efforts to integrate ICTs in their operations. It also measures the capacity of firms to come up with new technologies by taking into account the number of patent applications under the Patent Cooperation Treaty (PCT). Finally, it measures the extent of staff training as a proxy for the capacity of management (WEF, 2015).

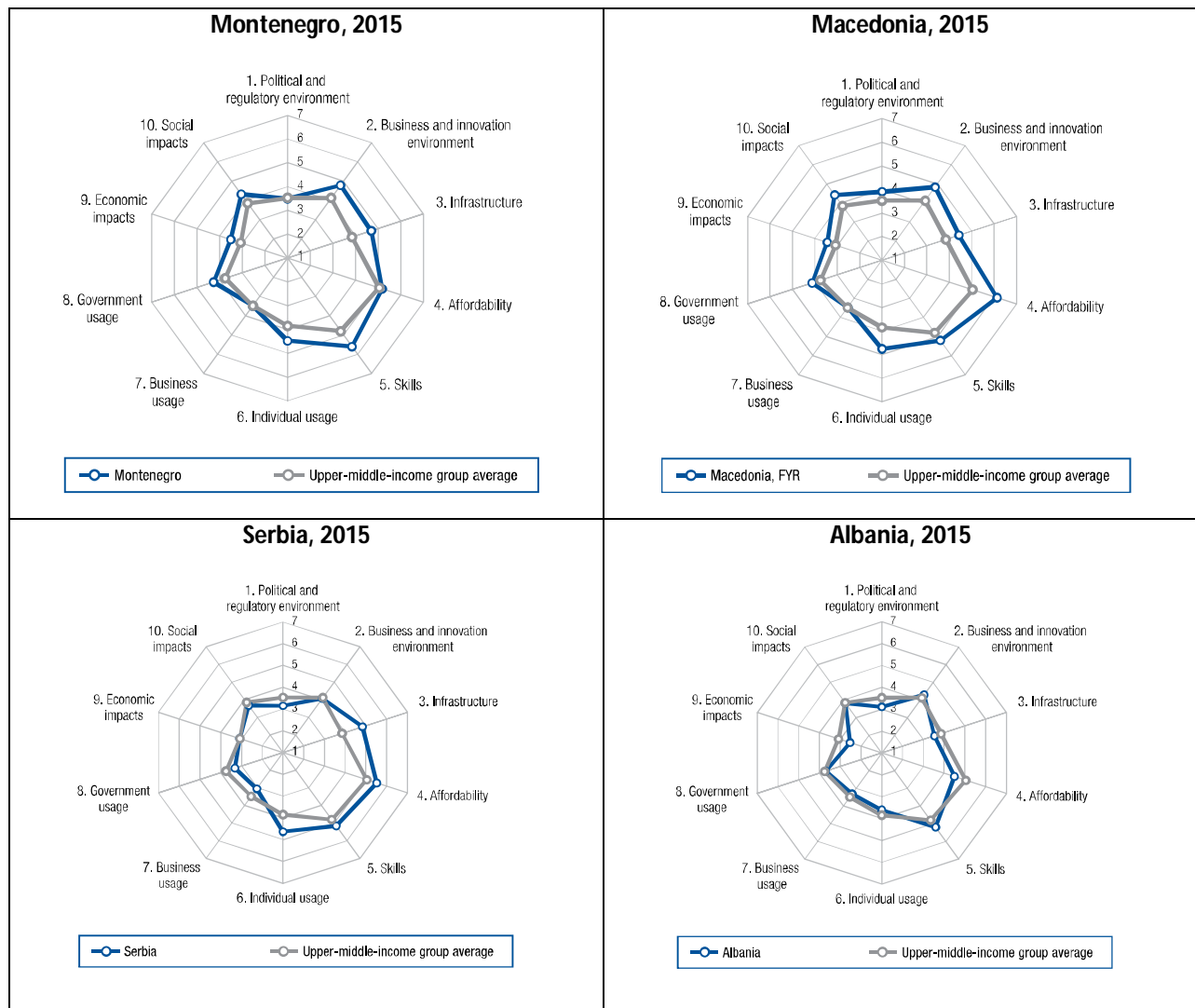


Main results on NRI on the global and regional level are showing that digital divide is still present and there's different level of ICT development among different countries. NRI is very important indicator for analysis of business potential of ICT in specific countries.

Table: NRI, 2014, 2015

Country	Rank - 2014	Rank - 2015	NRI 2015
Montenegro	52	56	4.3
Macedonia FYR	57	47	4.4
Serbia	80	77	4.0
Albania	95	92	3.7
Kosovo	N/A	N/A	N/A

Source: WEF, 2015.



Source: WEF, 2015.



It can be seen that in comparison between four countries from the region all analyzed countries (Albania, Serbia and Macedonia) have improved their ranking positions in 2015 comparing to 2014 regarding NRI indicator. Montenegro has dropped from 52nd to 56th position but is highly ranked in comparison to other WB countries (NRI 4.4.)⁵.

Montenegro – In general the ICT sector in Montenegro is well developed and competitive at the regional level, primarily due to the existence of strong telecommunications operators with foreign capital. Montenegrin IT market is quite fragmented with the lack of interoperability. On the other hand, national IT market is mostly based on the companies that are oriented towards: hardware, software development and IT services. Visible is the disproportion in the level of development and size of revenue within the IT sector. IT companies is characterizing small number of employees (592 employees in 219 IT companies⁶).

Serbia - Serbia has a large number of highly qualified and educated personnel in the IT area. After several years of decline IT market in Serbia faced recorded slight growth. Dominant issue regarding Serbian IT market is the fact that the industry is tied to inadequate staff training, which does not follow the needs of the IT sector in general. Companies are requiring specific educational profiles and trainings in the field of IT. Software industry and IT services industry is developed in four main segments:

1. Startup;
2. Outsourcing;
3. Development and export of original software products;
4. Development centers of large multinational companies.

Macedonia - IT and software industry is one of the fastest growing industries in Macedonia, with a growth rate of about 47% in the last five years. In 2011 turnover was \$178.98 million and employed more than 2000 people. Hardware is the largest and most dynamic segment of the Macedonian IT market, with a striking yearly growth of 84.7%, taking up nearly 62% of the total IT market.

⁵ Note: Value 1-7.

⁶ Chamber of Commerce, 2013.



IT services is the second largest segment, comprising 25.6% of the total IT expenditure, whereas packaged software is in third place comprising 13% of the total market, with an 8.2% annual growth rate. According to IDC expectations Macedonian IT market might grow 1.5% on annual basis starting from 2012 and to expand at a compound annual growth rate (CAGR) of 4.8% to reach approximately \$226 million in 2016.

There are a few ICT associations and chambers present in the country and representing the private sector. However MASIT is the ICT Association representing about 80% of the local IT market and responsible for the public dialog, collaboration and networking of the companies presented by the chamber.

SWOT/Macedonian ICT market

Strengths	Weaknesses
<ul style="list-style-type: none"> • IT industry is recognized as a key economic sector by the Macedonian authorities; • Private sector in ICT is well organized and represented by MASIT; • Macedonian companies are aware of the need for implementation of the latest standards relevant to the IT companies; • Qualified human resources; • ICT companies with a wide range of specialization; • Cheap labor costs; • Support from international donor organizations; • Stable economic development of the country during the last 10 years; • Growing ICT market. 	<ul style="list-style-type: none"> • Micro and small enterprises; • Cooperation culture between companies is not sufficiently developed yet; • Potential for work sharing in the region is not extensively used; • Marketing strategies are not planned for the long-term; • Lack of project management skills and/or industrial production of software; • Country does not have the image of an IT supplier; • Lack of international marketing skills and expertise; • Lack of quality certification and development methodologies;
Opportunities	Threats
<ul style="list-style-type: none"> • Implementation of globally recognized models and practices; • Clustering with other competitive sectors in Macedonia and the region; • EU integration provides opportunities for easier access to regional and EU markets; • Development of own products; • Strategic alliances with foreign companies to increase exports; • Increased understanding of software process improvement methodologies; • Strong tendency to improve the IT image of the country; • Rapid development of the mobile and internet structure; 	<ul style="list-style-type: none"> • Loss of export demand and decrease of the export prices; • Lack of a coherent industry image; • Dependency on scientific-technical development through orientation to the home market; • Low-cost competition; • Brain Drain of leading IT specialists; • Challenges in gaining an image of new-born IT supplier.

Source: ESI Center Eastern Europe, „ICT country profile-Macedonia 2013, Regional competitiveness initiative“



There is relatively high level of awareness in the country regarding the importance of implementation of ICT in other industries, especially since the country is trying to become one of the regional leaders in the ICT industry and also join the EU. A number of projects have been initiated by the Ministry of Information Society and Administration aiming at improving the ICT stability and presence in Macedonian economy.

Albania - Albanian ICT companies are mostly specialized in software development, design, system integration, and hardware distribution. IT companies are relatively young. About 47% of them have been in operation for not more than 5 years, about half of which have been established within the past 3 years. Slightly less than a third of the surveyed companies have been operating for more than 10 years. Such figures show a very high rate of new IT businesses in the past years – very high also in comparison with the overall new business growth in the country. Companies with one owner are dominant. Majority of Albanian ICT companies are SMEs, predominantly active in the local market. ICT companies are now gradually expanding their presence in EU markets.

Kosovo - ICT in Kosovo slowly started regaining traction in development since 1999. From being almost non-existent 10 years ago, Kosovo IT companies started offering wide range of ICT services to their customers both local as well as to foreign companies. Interesting fact backing up the fast growth was that Kosovo has the youngest population in Europe with advanced ICT knowledge. Today public and private education in the field of IT are performed through companies such as CISCO and Microsoft which are certified partners in giving crucial education to thousands of young Kosovars, the demand for such way of education is still increasing.

Identifying reliable sources of systematic market data on Kosovo ICT Industry is extremely problematic. Most of the information is based on custom surveys, different methodologies that make difficulties in comparison of results. The most accurate recent analysis of the ICT Kosovo market size and segmentation comes from the IDC study of 2012 as well from other trusted sources.

Table: ICT budget for Kosovo, 2012-2015

According to Ministry of Finance, the Kosovo budget for ICT during 2012 – 2015 is:¹⁰

Ongoing from	New from	Total	Estimates from	Estimates from	Total
2012	2013	2013	2014	2015	2013-2015
12.807.680	1.204.750	14.012.430	15.243.230	13.167.130	42.442.790

Source: Ministry of Finance, 2012

High number of Kosovo ICT companies (88%) is Kosovar owned, 2% have Kosovar majority ownership, 3% have equal ownership by Kosovar and foreign owners, and 8% are foreign-owned companies. It is important to note that there are more ICT companies of mixed Kosovo-foreign ownership and whole foreign ownership than non-ICT companies which are almost entirely locally owned. Therefore, the positioning for foreign investment through ownership acquisition is already present at ICT companies and less so at non-ICT companies. Comparison to the reference of 2010 for four major ownership types shows some fluctuation which may be attributed more to different sample size than to a real shift of values. Comparison to the reference of 2010 for four major ownership types shows some fluctuation which may be attributed more to different sample size than to a real shift of values.

Table: Companies' ownership 2010-2013

Company ownership	ICT 2010	ICT 2013	non-ICT 2013
	%	%	%
100% Kosovo owned companies	80.2	87	95
Most of the company is Kosovo owned	0	2	1
50-50 Kosovo owned / foreign	3.3	3	1
100% foreign-owned companies	6.6	8	1
Other/refused	9.9	-	-

Source: Ministry of Finance, 2012



Clients & Location

The ICT sector consumers in Kosovo consist of telecommunications, financial sector, government, and individual buyers - home users. The sector is heavily affected by international organization present in Kosovo, either by servicing directly their operational needs or by implementing various donor projects supported by these international players. Percentage of client distribution groups shows close correlation to the income share realized from these groups.

Vast majority of ICT companies (87%) have their clients located in Kosovo, with a small number of businesses (13%) having clients located abroad (up from 3.3% in 2010). Non-ICT companies have a larger share of their clients in Kosovo (93%), compared to ICT companies, and a very small share in the Balkans (3%) and Europe/worldwide (4%).

The share of incomes by location of costumers corresponds closely to the location of clients, and it shows that ICT companies realize higher revenue share (13% cumulative) from customers abroad than non-ICT companies (7% cumulative).

Finally, ICT companies do not pursue aggressive marketing and sales to get to new customers. In fact, most of them (34%) wait passively for clients to contact them, followed by companies who get business leads through their web sites (19%) and by phone (19%). This is an indicator of the general lack of sales and marketing skills among ICT companies.

Supply with ICT products and services

ICT companies have greater dependence on imports than non-ICT companies when it comes to getting ICT services and product supplies. ICT companies get IT services and products in Kosovo in a little more than half of the cases (59%), close to one third (29%) in Europe and worldwide and just 12% in the Balkan region. On the other hand, non-ICT companies are primarily supplied with IT Products and Services in Kosovo (95%), with just a small portion supplied from abroad (2% in Balkans and 3% in Europe and worldwide).

Recent study from STIKK (Kosovo Association of Information and Communication Technology) shows that the ICT market in Kosovo has not changed significantly in the period 2010 - 2013, which is to say it has not developed as expected. The growth forecasts by the companies are grim, reflecting the reduced spending primarily by the government, lack of new entrants or major investments in telecommunications, and the decrease of purchasing power of retail buyers in Kosovo.



“No money” (meaning no buyers) and “No work” at aggregate 28% of the overall business sample in Kosovo, followed by the complaint on “Competition” at 21%, indicate that the economic recession might be sneaking into Kosovo too, and that businesses are struggling due to lack of work. The IT services and BPO seem to be the only segments promising some growth.

Looking over IT sector as a whole, Kosovo's IT spending will increase 2.6% in 2012 and that it will continue to grow through to 2016, with traditional IT segments (IT services, software, computers and peripherals) performing better than networking (IDC, 2012).

CHAPTER 2: SEE ITIB2015 COMPARATIVE ANALYSIS

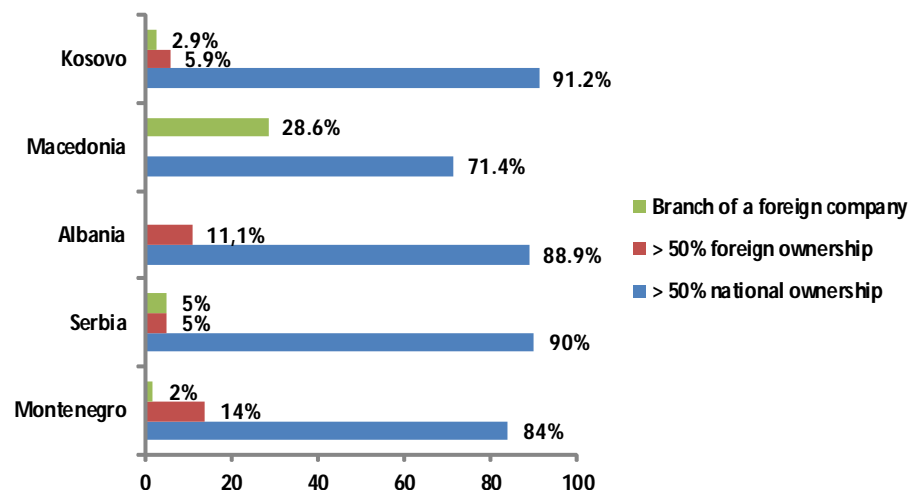
2.1. General information about the companies

Ownership structure

Dominant ownership structure of ICT companies in the region is based on domestic ownership. The greatest number of companies with dominant domestic ownership is present in Kosovo (91.2%). According to the survey Macedonia had the greatest percentage of foreign companies' branches in 2015 comparing to other countries from the region (28.6%).

- *Montenegro – In 84% surveyed companies there's present domestic ownership, while in 14% has dominant foreign ownership;*
- *Serbia – From the total number of surveyed companies 90% has domestic ownership;*
- *Macedonia – There are 71.4% companies that has domestic ownership, while 28.6% are representing branches of foreign companies;*
- *Albania – 88.9% companies has domestic ownership while 11.1% has dominant foreign ownerships;*
- *Kosovo – In case of Kosovo there are 91.2% companies that have dominant domestic ownership.*

Graph 1: What is the ownership structure of the company?





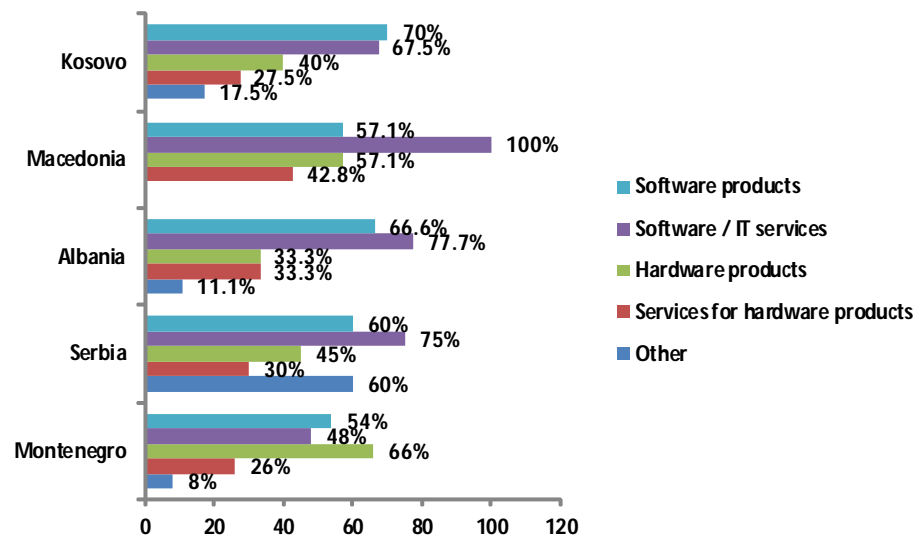
Companies' products and services

Note: Possibility to provide multiple answers.

Most of the ICT companies from the region are software oriented offering software and IT services. For example, 100% surveyed ICT companies is providing software/IT services. On the other hand, in case of Kosovo the most dominant are software products (70%), while in case of Montenegro there's 66% companies providing hardware products, while there's quite equality between software products and software/IT services.

- Montenegro – Least number of companies are providing services for hardware products (26%);
- Serbia – From the total number of surveyed companies 75% of companies is offering software/IT services;
- Macedonia – Least number of companies are providing services for hardware products (42.8%);
- Albania – Equal percentage of surveyed companies are providing services for hardware products and hardware products (33.3%);
- Kosovo – Majority (70%) of the companies are providing software products.

Graph 2: What type of products and/or services your company provides?





Memberships in ICT Associations

Note: Possibility to provide multiple answers.

Majority of ICT companies from Kosovo and Serbia are members of different ICT Associations. In Serbia 65% of ICT companies are members of two associations (ICT Network). In Kosovo 77.5% of ICT companies are members of some Associations, where 70% belongs to STIKK. In Montenegro, 86% of companies are not members of any ICT Association.

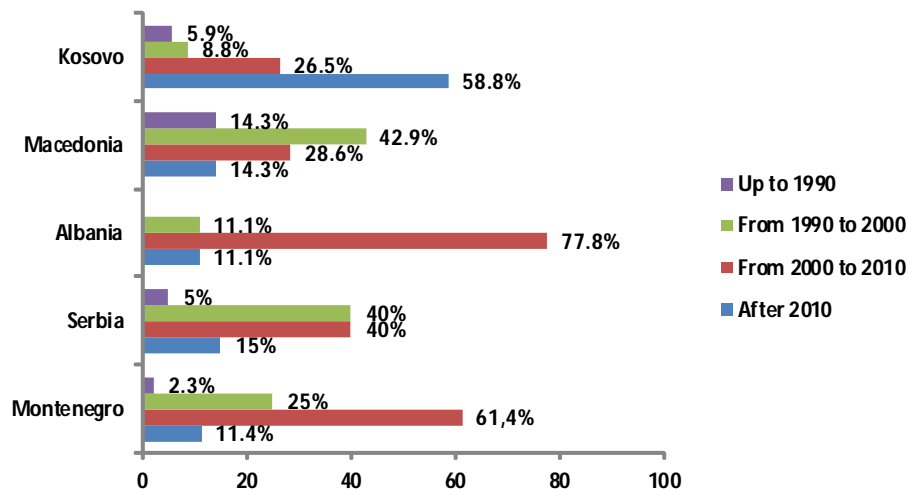
Table 1: Memberships in ICT Associations

Serbia		Kosovo		Montenegro		Macedonia		Albania	
ICT Network	60%	AITA	7.5%	Montenegrin IT Cluster	10%	MASIT	100%	AITA	100%
NiCAT	5%	STIKK	70%	No membership	86%				
No membership	35%	No membership	15%	Other business Association	4%				
		Other	2.5%						

Year of foundation

In case of Montenegro and Albania, majority of ICT companies has been established during the period 2000-2010. On the other hand, 42.9% companies from Macedonia are established between 1990 and 2000. On the opposite side, ICT companies from Kosovo are representing newly established companies where 58.8% is established within the period after 2010.

Graph 3: Year of foundation Which was the year of foundation of the company in the country?





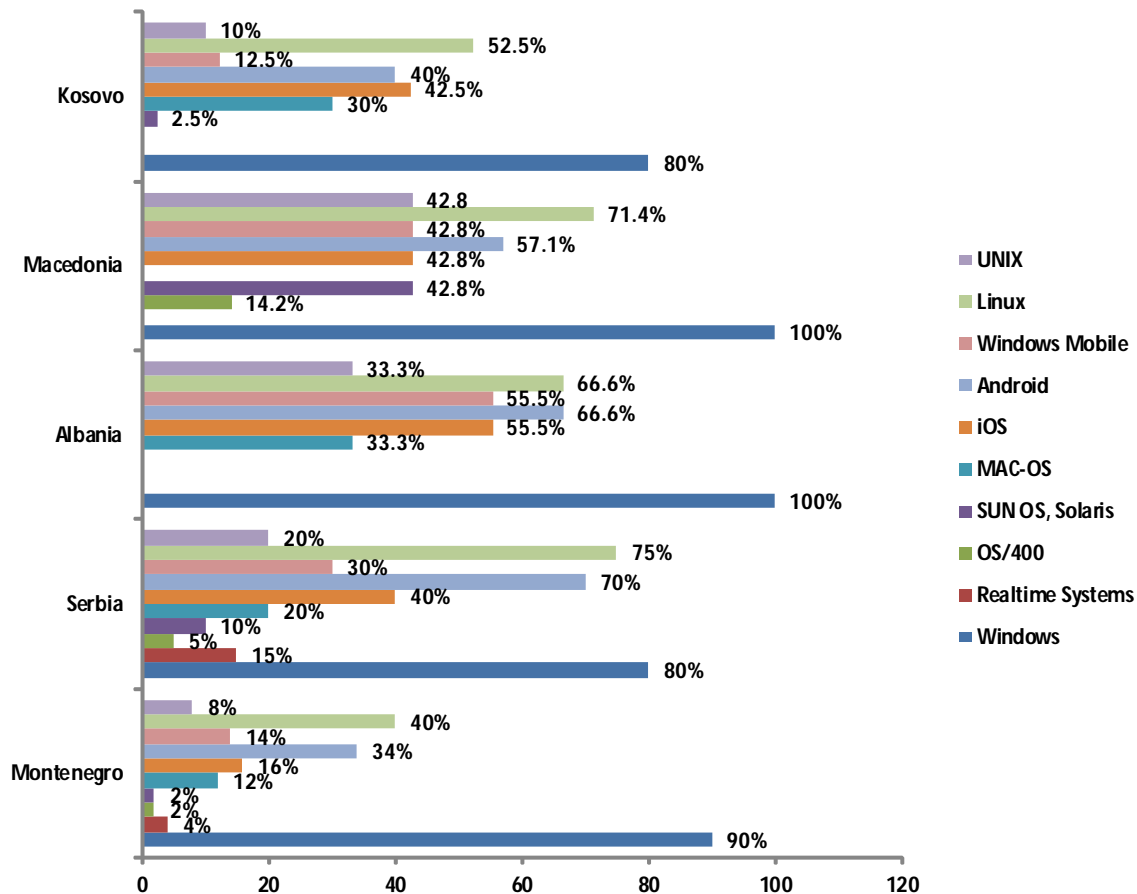
Operating Systems and Platforms

Note: Possibility to provide multiple answers.

Windows represents dominant operating system in all analyzed countries from the region. On the other hand Linux represents second mostly used system while on the third place is Android.

- *Montenegro – From the total number of surveyed companies 90% is using Windows, 40% is using Linux and 34% Android;*
- *Serbia – 80% is using Windows, while least percentage is using OS/400 (5%);*
- *Macedonia – 100% companies are using Windows, while 71.4% is using Linux;*
- *Albania – 100% companies are using Windows, and 66.6% Android and Linux;*
- *Kosovo – 80% are using Windows, while 52.5% is using Linux.*

Graph 4: Operating Systems and Platforms





Programming Languages and Developing Tools

Note: Possibility to provide multiple answers.

In Macedonia and Serbia dominant programming languages and development tools are Java/JavaScript and .NET. 85.7% of ICT companies in Macedonia use those programming languages and development tools, while in Serbia 85% use Java/JavaScript and 75% .NET. In Albania and Kosovo dominant programming languages and development tools are Java/JavaScript and HTML, XML. 77.7% of ICT companies in Albania use those programming languages and development tools as dominant, while in Kosovo 60% of ICT companies use HTML, XML and 57,5% Java/JavaScript as dominant programming languages and development tools. In Montenegro dominant programming languages and development tools are Java/JavaScript and Basic -C++. 58% of ICT companies in Montenegro use Java/JavaScript and 40% Basic -C++.

Table 2: Programming Languages and Development Tools (%)

		Montenegro	Serbia	Albania	Macedonia	Kosovo
1	ABAP4			11.1		
2	Assembler		10	11.1	14.2	5
3	Visual Basic, VBA etc.				42.8	20
4	Basic - Visual Basic, VBA etc.	12	40	11.1		
5	Basic -C	12	60	33.3	57.1	27.5
6	Basic -C++	40		44.4	71.4	37.5
7	Basic -Clipper	6	5			5
8	CL/400 - AS/400 Control Language		5			
9	Delphi	4	5		42.8	2.5
10	Cobol			11.1	14.3	
11	dBase	2		11.1		2.5
12	Fortran	2				
13	Foxpro	4			14.3	
14	ESQL/C	2		11.1		2.5
15	HTML, XML	36	70	77.7	57.1	60
16	Java, JavaScript	58	85	77.7	85.7	57.5
17	Lips	2				
18	JCL					2.5
19	Macro Languages– others			11.1		2.5
20	Lotus Notes Script				14.2	
21	.NET	26	75	66.6	85.7	50
22	.Objective C	4	25		28.5	22.5
23	Pascal				14.3	
24	Perl	4	5	22.2	14.3	5
25	PHP	22	35	66.6	57.1	55
26	PL/SQL	14	20	55.5	28.5	
27	Powerbuilder	6				2.5
28	Python	4	20		14.3	10
29	Script Languages – others	2	5		14.3	10
30	Shell,K-Shell,Bourne-Shell		10		28.5	5
31	Tcl/Tk		5		14.3	
32	Visual Objects	4	5		14.3	12.5
33	Other	6		22.2		2.5



Database Technologies

Note: Possibility to provide multiple answers.

Dominant database technology used in ICT companies in Albania, Macedonia and Kosovo is MS SQL Server. In case of Serbia 85% of ICT companies is using mSQL / MySQL, while in Montenegro 46% of ICT companies is using SQL as dominant database technology.

Table 3: Database Technologies (%)

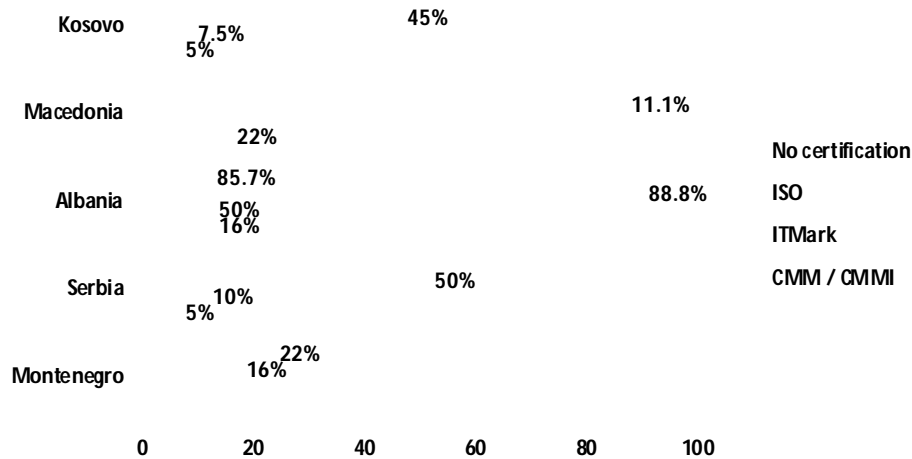
		Montenegro	Serbia	Albania	Macedonia	Kosovo
1	Access	44	25	44.4	71.4	32.5
2	Adabas	2				
3	Btrieve					2.5
4	DAO		5			
5	DB2	8	10	11.1	42.8	5
6	DB/400	2			28.5	
7	IDMS				14.2	
8	Informix	2	5		57.1	2.5
9	Interbase				14.3	
10	ISAM				14.3	
11	JDBC		20	11.1	42.8	2.5
12	Lotus Notes				14.3	
13	MS SQL Server	28	65	100	100	60
14	mSQL / MySQL	30	85	88.8	71.4	55
15	Object Store	2				
16	ODBC	4	30	11.1	57.1	10
17	Oracle	18	35	22.2	71.4	20
18	Paradox		5	11.1		
19	Progress	2	5	11.1		2.5
20	RDB	2				
21	SQL	46	55	55.5	71.4	40
22	VSAM				14.3	
23	xBase - dBase, FoxPro, Clipper...	4	10			
24	Sybase	4		22.2		2.5
25	Base - dBase, FoxPro, Clipper...					2.5
26	Other	2				5

Quality Standards

Note: Possibility to provide multiple answers.

ISO Standards represents dominant quality standard that is implemented in the ICT companies within the region. For example, 88.8% ICT companies from Albania are certified with ISO standard, in Macedonia 85.7%, Serbia 50%, and Montenegro 16%. In Montenegro, 22% of the companies stated that they are still not certified.

Graph 5: Is your company certified according to one of the following quality standards?

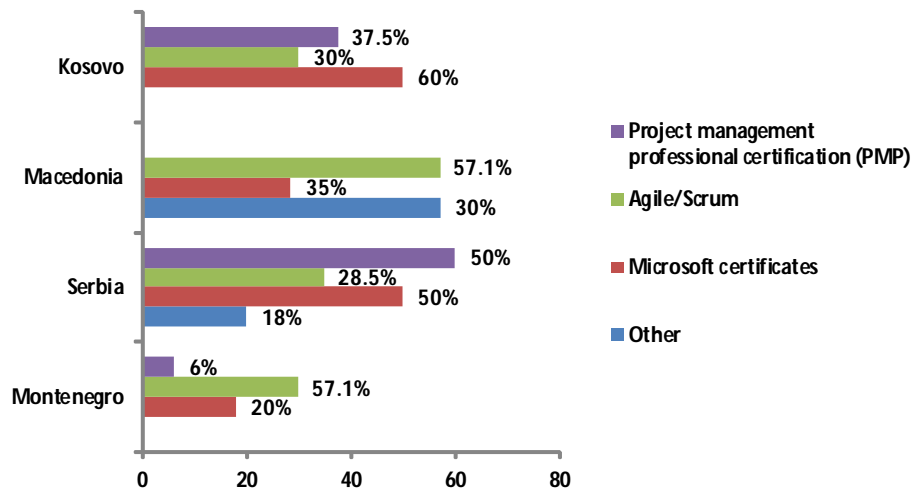


Technical Certifications

Note: Possibility to provide multiple answers.

There are different trends in technical certification among the employees in ICT companies in the region. In Serbia, dominant ICT companies' staff certification is Project management professional certification (PMP) with 60% of companies' employees having the PMP certificate. In Kosovo 50% of staff has Microsoft a certificate, in Montenegro 30% of ICT employees has Agile/Scrum certificates, while in Macedonia 57.1% have both Agile/Scrum and other non-specified certificates.

Graph 6: Do your employees have some of the following technical certifications?

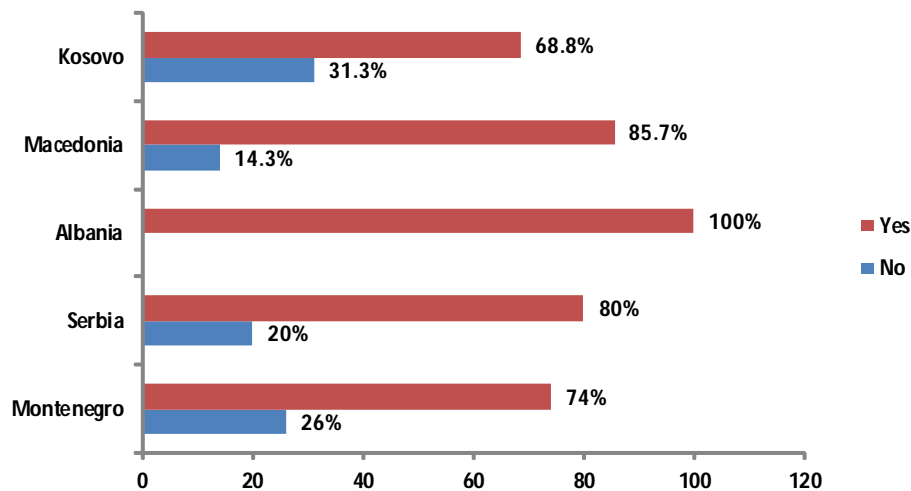


2.2. Export

International Clients

Majority of the companies in all countries do business with international clients within their countries. In Albania 100%, Macedonia 85.7%, in Serbia 80%, while in Montenegro 74% and in Kosovo 65.6% of the companies do business for the international clients.

Graph 7: Does your company work for international clients in your country?

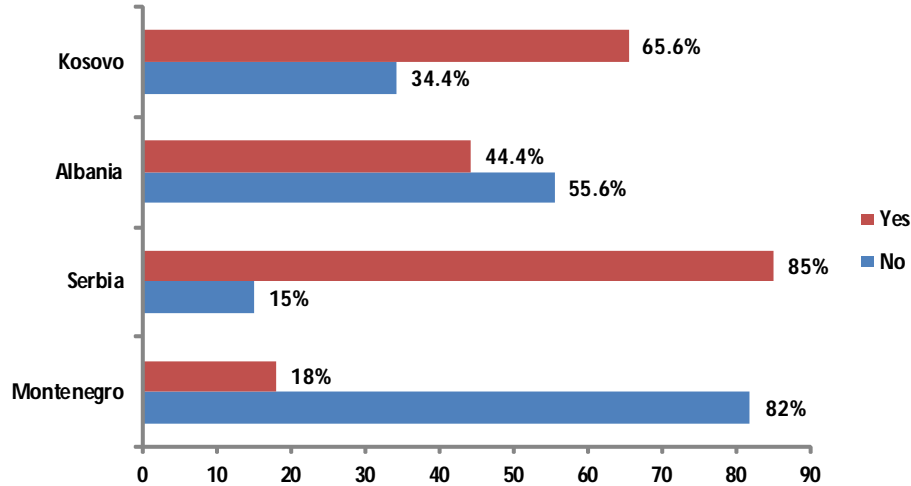


In case of Montenegrin ICT companies from the total average of those companies established before 1990 100% is doing business with international clients. On the other hand, least number of companies established after 2010 is doing business with international clients (60%).

Export Activities

Serbian ICT companies are the most active ones in terms of export. Namely, 85% of surveyed companies are exporting their services. On the contrary, in case of Montenegrin ICT companies only 18% surveyed companies are exporting their services which represent the lowest percentage comparing to other countries involved in the survey.

Graph 8: Does your company conduct export activities?



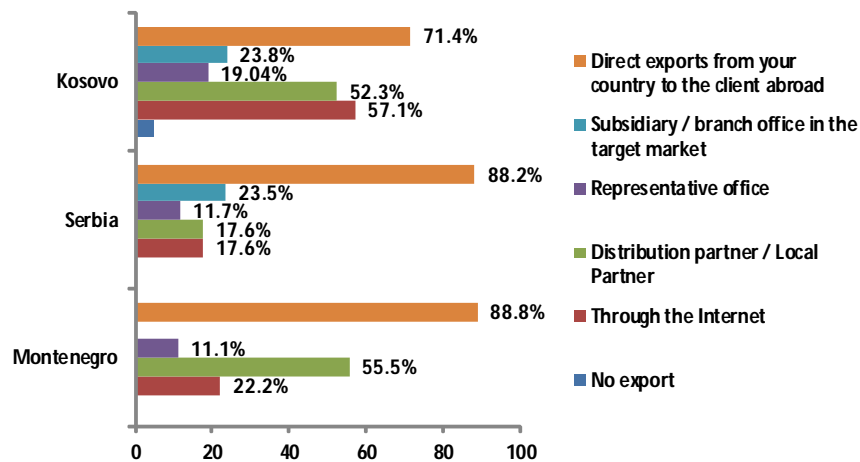
From the total average of those companies from Montenegro that are exporting their services 50% has more than 20 employees while 21.6% are those that are doing business activities with the international clients.

Ways of Exports

Note: Possibility to provide multiple answers. This question is addressing only those companies that are exporting their goods/services.

Majority of the surveyed countries are exporting directly from the country to the clients abroad. This stands for Montenegro (88.8%), Serbia (88.2%), and Kosovo (71.4%).

Graph 9: How do you conduct your exports?

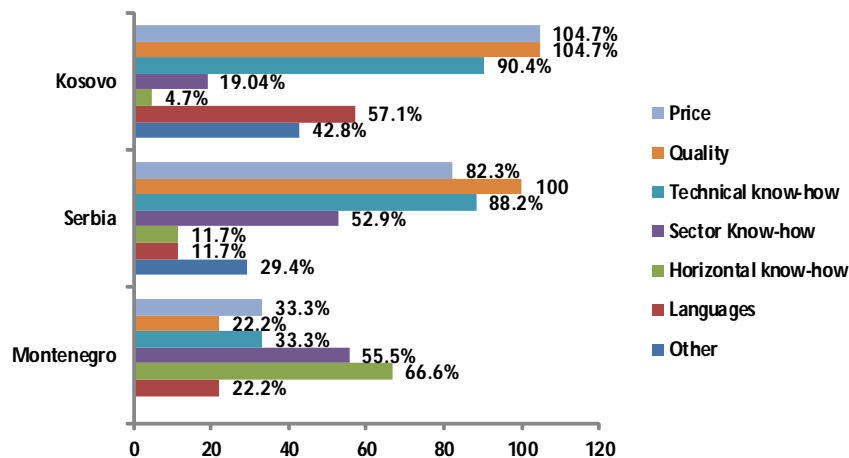


Core competitive advantages

Note: Possibility to provide multiple answers. This question is addressing only those companies that are exporting their goods/services.

Major core competitive advantages in the international markets are: price, quality and technical know-how. In case of Montenegro 66.6% of companies do think that horizontal know-how represents a key competitive advantage in the international markets. On the other hand, in case of Serbia 100% companies to think that it is a quality of service.

Graph 10: What are your core competitive advantages in the international markets?



Foreign market potential

Note: Possibility to provide multiple answers.

Different countries had different attitude towards the potential foreign markets that might be interesting for the future export activities.

- Montenegro – Majority of ICT companies from Montenegro do think that regional market (Western Balkan countries) has a greatest potential for future business operations in terms of export from Montenegro. In total 69% companies has that opinion.
- Serbia – Surveyed companies from Serbia have also recognized the greatest potential in the WB region for their future business operations (60%). On the other side, the same percentage of companies does think that North America and Canada are markets with a great potential for future business operations.
- Kosovo – Majority of ICT companies from Kosovo has the attitude that German market represents a key potential market for future export activities of ICT companies from Kosovo (59.2%).
- Albania – The same stands in case of Albania where 71.4% companies consider Germany as a potential market for export of ICT goods/services from Albania as well as the WB region (62.5%).



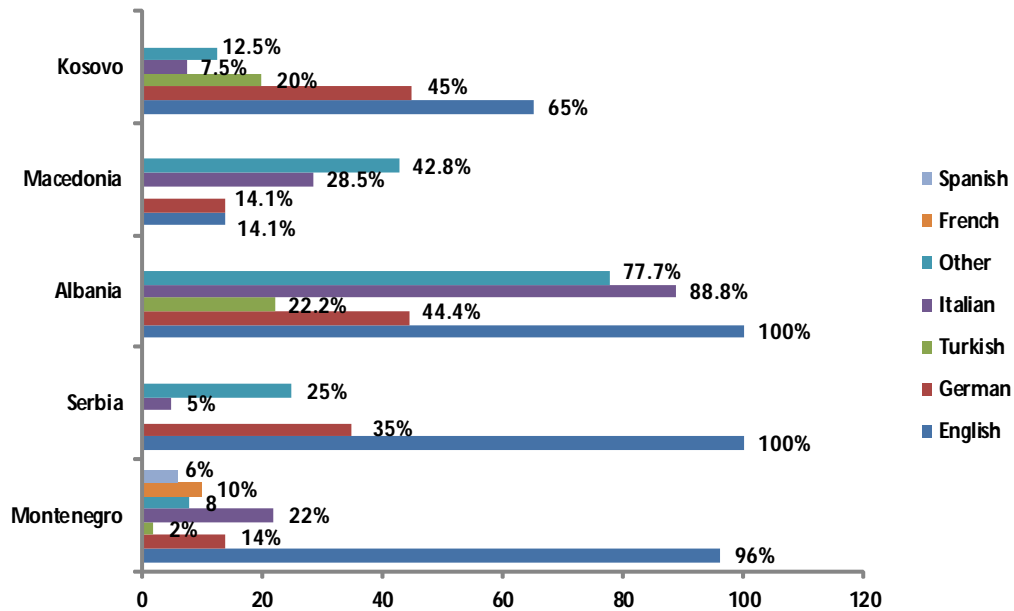
- *Macedonia – In case of ICT companies from Macedonia majority (71.5%) has the opinion that North America and Canada have the greatest export potential for their ICT products/services. (ANNEX 1)*

Foreign language skills

Note: Possibility to provide multiple answers.

English language represents a dominant foreign language that is present in targeted ICT companies from the region. Additionally, employees mostly have knowledge of German and Italian language.

Graph 11: Which foreign language skills are available in your company?





Export barriers

Note: Possibility to provide multiple answers.

Table 4: Where do you see the biggest export obstacles?

Country	Not problematic	Highly problematic
Montenegro	Visa requirements	Lack of support by government institution (export financing schemes, etc.)
	Market information (lack of suitable information on export markets)	Lack of branding of the local IT industry abroad
	Lack of technical skills	Lack of export-oriented trainings and business development/consulting services
Serbia	Lack of technical skills	Lack of support by government institution (export financing schemes, etc.)
	Visa requirements	Lack of branding of the local IT industry abroad
	Culture & language barriers	Lack of export-oriented trainings and business development / consulting services
Kosovo	Culture & language barriers	Visa requirements
	Lack of branding of the local IT industry abroad	Lack of support by government institution (export financing schemes, etc.)
	Market information (lack of suitable information on export markets)	Finding the right business partner
Macedonia	Lack of export-oriented trainings and business development / consulting services	Costs of exporting
	Technical standards and requirements (ISO, CMMI, specific technologies, etc.)	Lack of qualified staff to conduct export activities
	Lack of interest/awareness among foreign companies	Culture & language barriers
Albania	Culture & language barriers	Lack of branding of the local IT industry abroad
	Visa requirements	Lack of support by government institution (export financing schemes, etc.)
	Lack of export-oriented trainings and business development / consulting services	Lack of business contacts in target markets



2.3. Statistics

Total sales in 2013, 2014 and 2015 (projections)

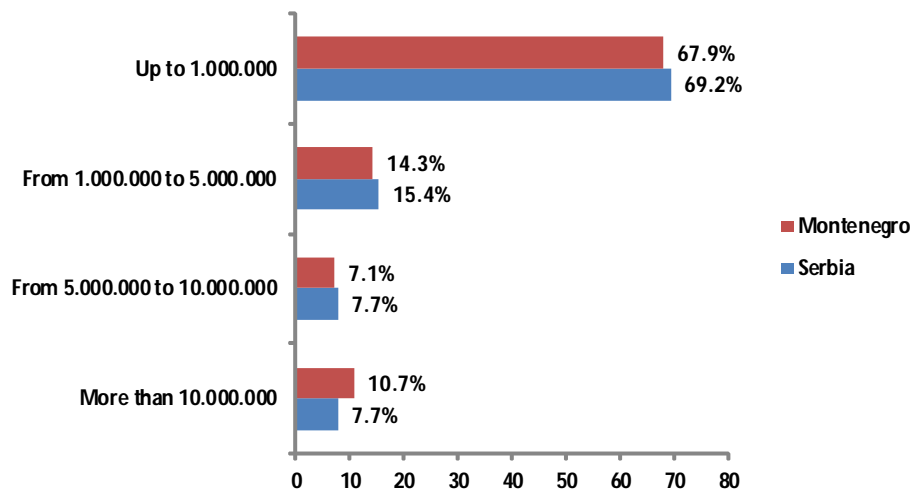
Note: Data available for Montenegro and Serbia.

Total annual turnover in 2013 and 2014

Greatest percentage of ICT companies from Montenegro had up to 1 million euro annual turnover in 2013, which represents 67.9% of the sample. On the other hand, the same category in 2014 faced slight decrease to 66.7%. Companies that had annual turnover higher than 10 million euro faced increase in 2014 comparing to 2013. Namely, in 2013 10.7% ICT companies from Montenegro had more than 10 million euro annual turnover, while in 2014. it was 11.1%.

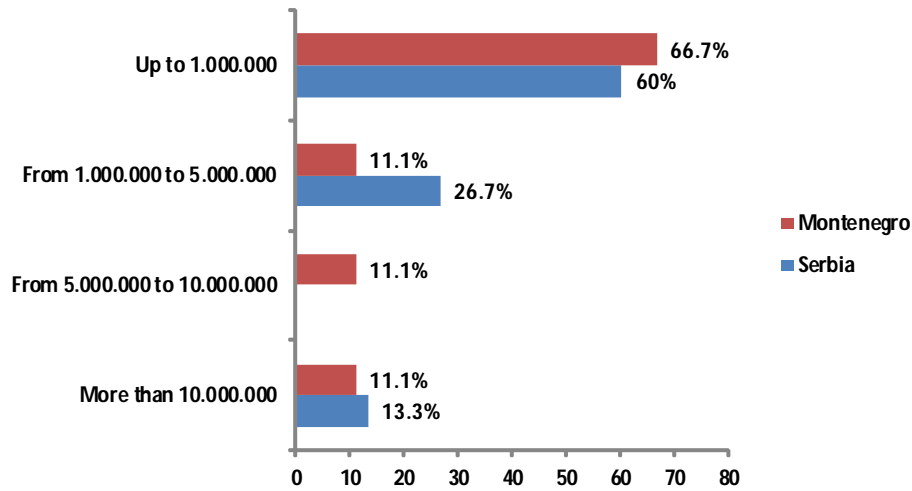
In case of Serbian ICT companies in 2013 69.2% had total annual turnover up to 1 million euro, while this indicator decreased in 2014 on 60%. On the other hand, number of companies that have up to 5 million euro annual turnover increased in 2014 (from 15.5% in 2013 to 26.7% in 2014).

Graph 12: What were your total sales in your local currency-2013





Graph 13: What were your total sales in your local currency-2014

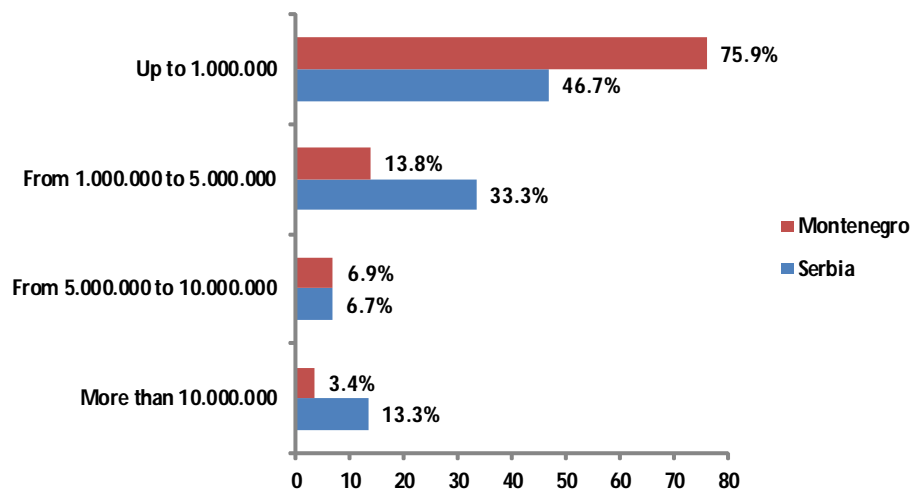


Projections for 2015

Montenegro – Greatest number of surveyed ICT companies projected that they will have up to 1 million euro annual turnover in 2015 (75.9%) or up to 5 million euro (13.8%).

Serbia – In case of Serbian ICT companies 46.7% projected that they will have up to 1 million euro annual turnover in 2015 while 33.3% will have up to 5 million euro.

Graph 14: What were your total sales in your local currency-2015





Vertical sectors/Clients

Note: Possibility to provide multiple answers.

Analyses of the main domestic clients of targeted ICT companies from the countries from the region are represented by following results:

- *Montenegro – Majority of the ICT companies’ clients from Montenegro are from the financial sector, IT services and outsourcing as well as Telecommunications (wireless and mobile);*
- *Albania – In case of Albania their main clients are from sector of Education, Technology and Financial services;*
- *Macedonia – Majority of the ICT companies’ clients from Macedonia are from Press and Media, Education and Financial services;*
- *Kosovo – ICT companies from Kosovo have their main clients from the sector of Financial Services, Technology and Telecommunications.*

Table 5: Companies’ domestic clients (%)

	Montenegro	Albania	Macedonia	Kosovo
Aerospace	12	11.1	14.3	2.5
Automotive	28	11.1	28.6	2.5
Defence	22	11.1	57.1	5
Education	36	66.6	57.1	27.5
Financial services	56	44.4		17.5
Gaming and Entertainment	32		28.6	12.5
Healthcare Services	22	11.1	28.6	10
Households-domestic market	42			2.5
Industry	50	22.2	28.6	2.5
IT Services and Outsourcing	56	33.3	14.3	40
Press and Media	32	11.1	85.7	10
Manufacturing, Distribution, Retail	38	33.3		7.5
Marketing and Communications				15
Publishing house-domestic market	18	33.3		15
Non-profit organizations	34	22.2		12.5
Public sector (E-Government)	38	22.2	42.8	17.5
Real Estate	24	22.2	28.6	7.5
Services (HR, accounting, legal)	34		28.6	15
Technology	26	55.5		27.5
Telecommunications (wireless and mobile)	54	22.2		22.5
Telematics	8	11.1	14.3	2.5
Tourism and Hospitality	50	11.1	14.3	12.5
Trade, transport and logistics	44	11.1		5
Utilities	26	11.1	14.3	7.5

Note: Data for Serbia were not available.



Regional ICT companies are mostly providing their ICT services to the international clients in the field of IT services and outsourcing, Education and Publishing-house domestic markets (ANNEX 2).

Products/Services for the Clients

Note: Possibility to provide multiple answers.

Domestic clients

If we take into account which products and services are offered to domestic clients it can be seen that:

- *Montenegro – Majority of ICT companies is providing IT consulting to the domestic market (40%); IT Project Management (38%) as well as Product maintenance, Support and Customization (38%).*
- *Serbia – In case of Serbian ICT companies 60% is providing IT Project Management services to the domestic clients; 45% is providing IT consulting services, while 40% CRM, Web design and development and ERP/Supply chain.*
- *Albania – 77.7% companies are providing services to domestic clients in the Embedded Engineering and Development; 66.6% ERP/Supply Chain.*
- *Macedonia – 57.1% companies are providing following services to the domestic clients: E-commerce; Embedded Engineering and Development; Mobile solutions.*
- *Kosovo – In case of Kosovo majority of ICT companies is providing IT consulting services (37.5%), IT Project Management (22.5%). (ANNEX 3)*

International clients

On the other hand, ICT companies from the region are providing their services to the international clients as well. Considering that type of customers it can be seen that:

- *Serbia – Majority of surveyed ICT companies from Serbia is providing Custom Development/Outsourcing to their international clients (75%), IT Consulting on International markets as well as IT Project management (45%).*
- *Macedonia – Macedonian ICT companies are providing CRM (57.1%), Business process optimization (42.8%) as well as IT Project Management (42.3%).*
- *Kosovo – ICT companies from Kosovo are mostly providing following services to their international clients: Mobile solutions (22.5%) as well as Web design (22.5%). (ANNEX 3)*



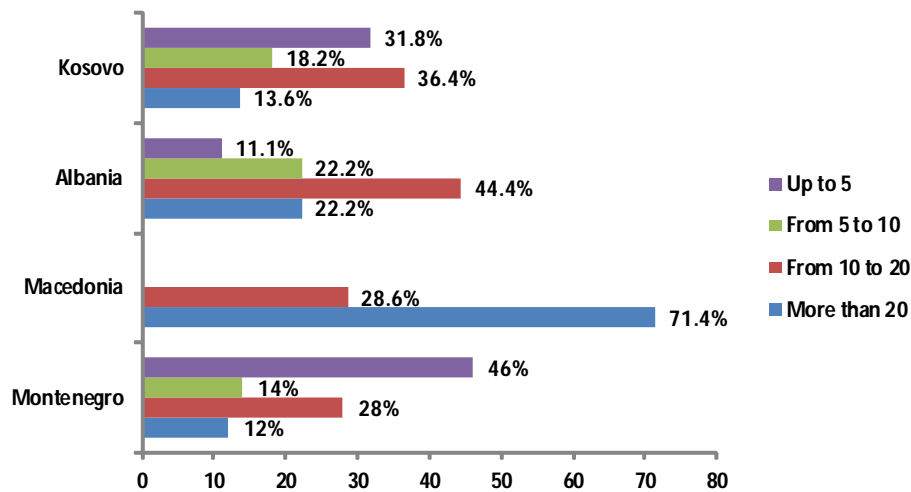
2.4. Human resources

Employees and associates-2014 and 2015 (forecast)

Note: Data for Serbia were not available.

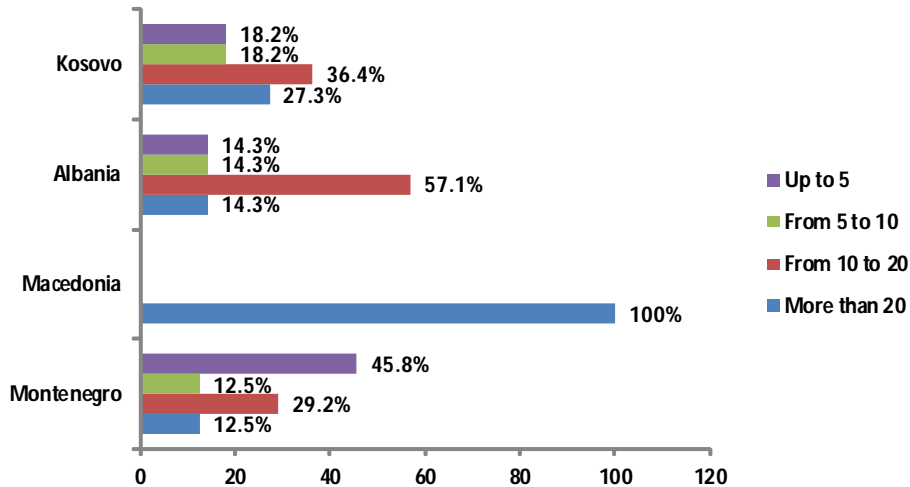
The highest number of employees and associates in ICT companies in 2014 is in Macedonia, where 71.4% of ICT companies have more than 20 employees and associates. In Albania and Kosovo, majority of ICT companies have from 10 to 20 employees and associates, in Albania 44.4% of ICT companies and in Kosovo 36.4% of ICT companies. In Kosovo, also, there is significant number or 31.8% of ICT companies with less than 5 employees and associates. The lowest number of employees and associates in ICT companies is in Montenegro, where 46% of the companies have up to 5 employees and associates.

Graph 15: What is the total number of your employees and associates-2014



The highest forecasted number of employees and associates in ICT companies in 2015 is in Macedonia, where prediction is that 100% of ICT companies will have more than 20 employees and associates. In Albania and Kosovo, majority of ICT companies predict to have from 10 to 20 employees and associates, in Albania 57.1% of ICT companies and in Kosovo 36.4% of ICT companies. The lowest predicted number of employees and associates in ICT companies in 2015 is in Montenegro, where 45.8% of the companies predict to have up to 5 employees and associates.

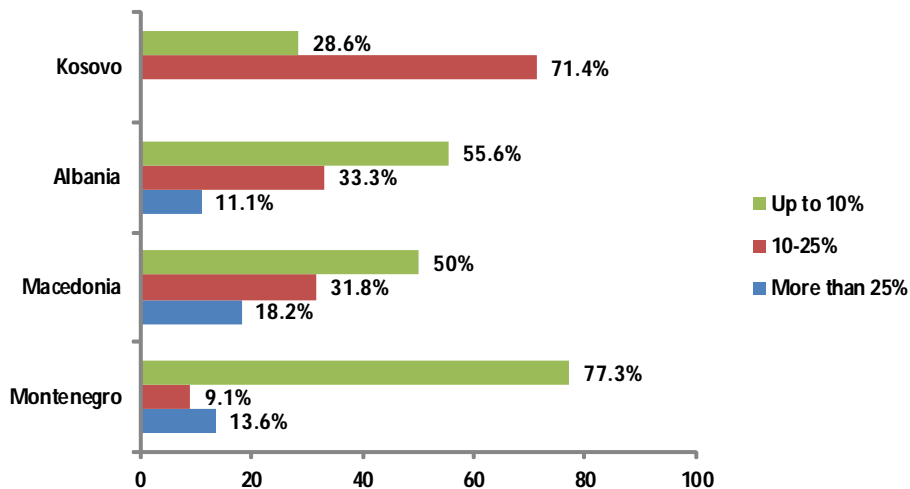
Graph 15.1.: What is the total number of your employees and associates- 2015 forecast



Employees who left companies

Number of employees who left the companies on the annual basis is those from Macedonia (10-25%), while in case of Kosovo more than 25% employees left their ICT companies on annual basis. Comparing to these two countries it can be seen that this indicator is the lowest in case of Montenegro (where up to 10% left companies which represents 77.3% of the sample). It can be seen that employees in ICT companies from Montenegro didn't change their job often. The same trend is present in case of Albania and Kosovo.

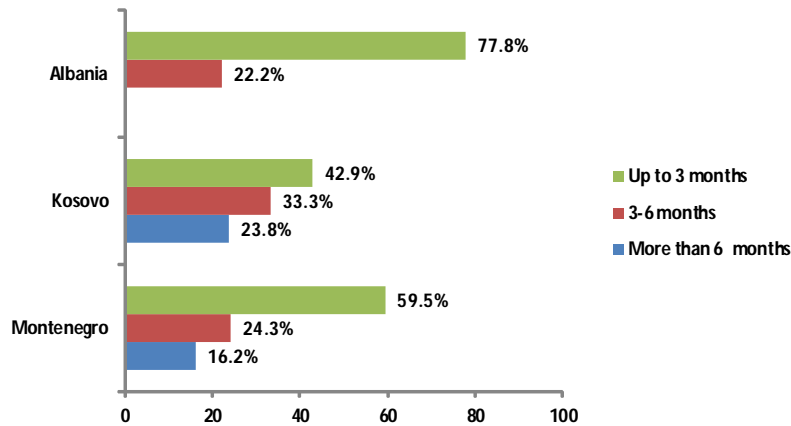
Graph 16: Specify the number of employees who leave the company on an annual basis





In average in case of Albania for 77.8% companies it takes up to 3 months to replace their employees with new ones. The same trend is present in case of Kosovo (42.9%) and Montenegro (59.5%).

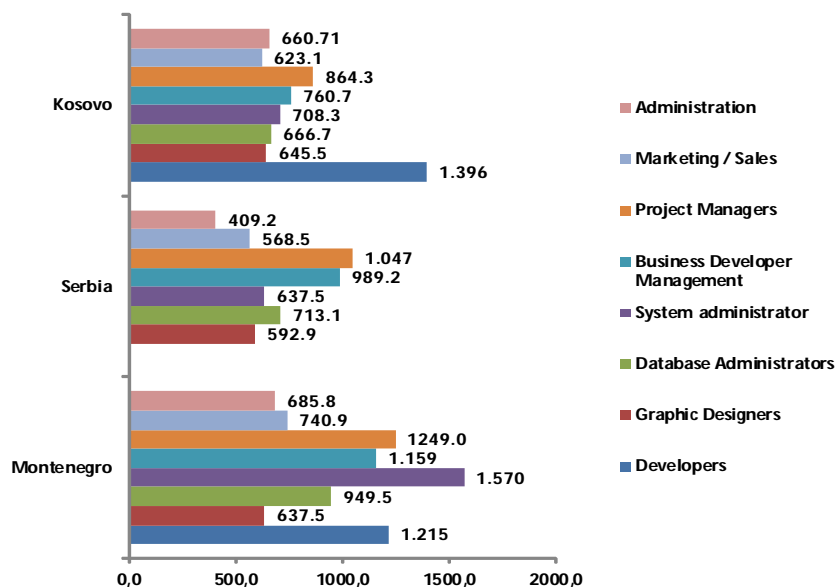
Graph 17: What is the average length of time required for a change of employees who leave the company?



Average monthly salaries in 2014

Comparing average monthly salaries for different positions in ICT sector in the region it can be seen that in case of Montenegro highest average monthly salary was 1,570eur (System Administrator), while the lowest was 637eur (Graphic designer). Salaries for ICT Developers are almost the same in Montenegro and Kosovo (1,215eur and 1,396eur respectively).

Graph 18: Average monthly salary in 2014 (euro)



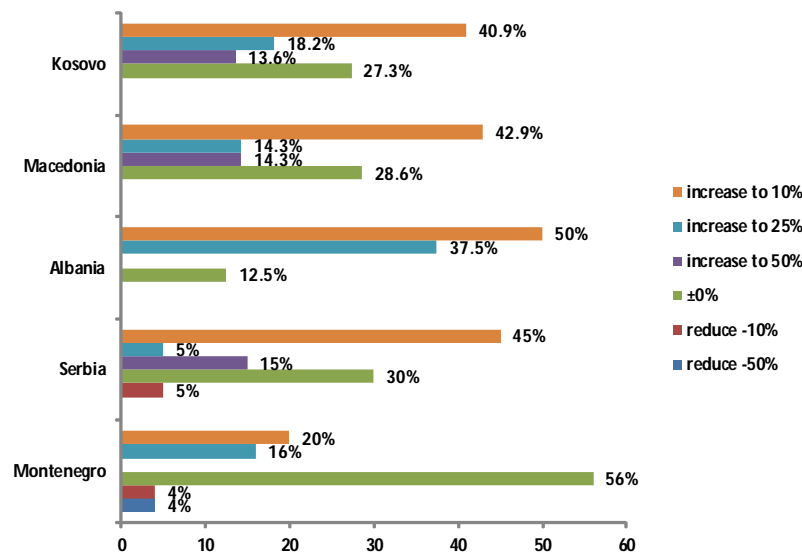


2.5. Forecasts

Expectations/Number of employees

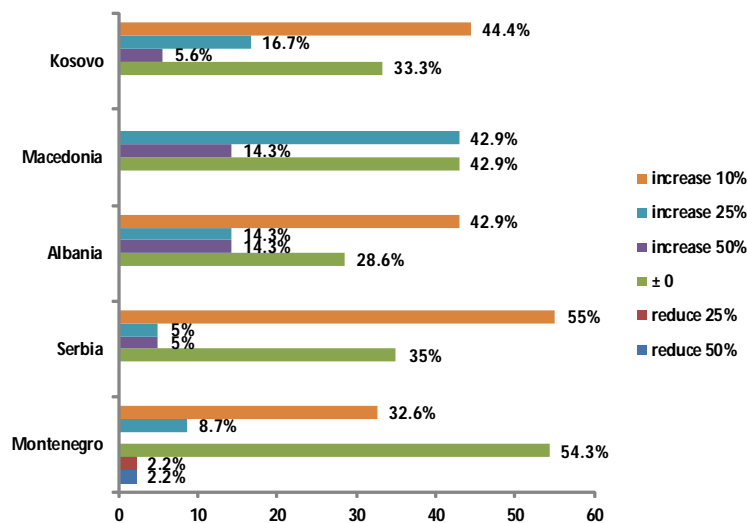
- Montenegro - 56% of ICT companies in Montenegro do not expect any changes in total number of employees.
- Region - On the other side 50% of ICT companies from Albania, 45% from Serbia, 42.9% from Macedonia and 40.9% from Kosovo expect increase in number of their employees up to 10%.

Graph 19: Expectations/Number of employees



Expectations/Salaries

Graph 20: Expectations/Salaries





Majority of ICT companies in all countries do not expect salaries to increase or decrease in future period. The highest percentage of companies is not expecting salaries that will be changed is in Albania 80%, Macedonia 57.1%, Montenegro 56.3%, Serbia 55% and Kosovo 43.8%. Only in case of Albania, 20% companies consider possibility that salaries will decrease by 50%.

Expectations/Business environment

Montenegro - 78% of ICT companies consider global and national economic situation that has major negative impact on business. On the other hand 16.3% ICT companies have opinion that intensified competition has a major positive impact on business.

Kosovo - 54.5% of ICT companies consider national economic situation as major negative impact on business.

Macedonia - 71.4% of ICT companies consider global and national economic situation as a major negative impact on business.

Serbia - 70% of ICT companies consider national economic situation as major negative impact on business, while 10% of them consider intensified competition as major positive impact on business.

Albania - 88.9% of ICT companies consider national economic situation as major negative impact on business, while 33.3% of them consider intensified competition as major positive impact on business.



Table 6: How do you assess the impact of the following factors on business?

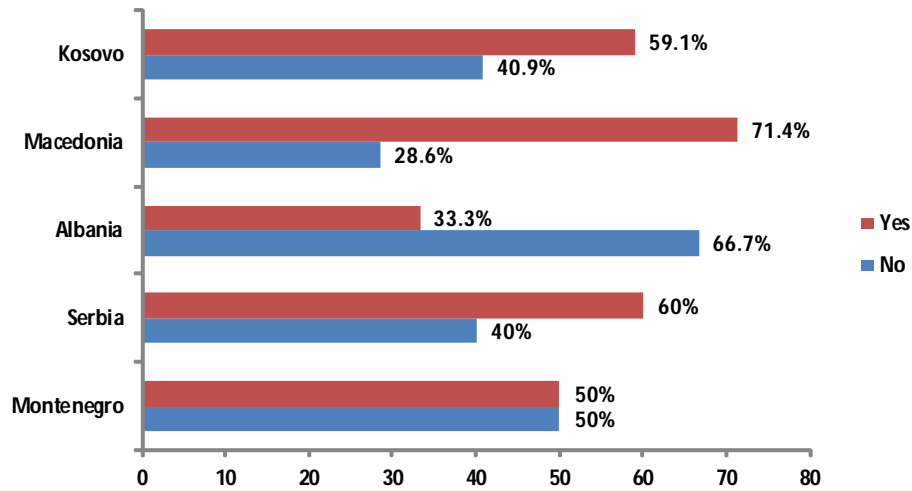
		Negative	Neutral	Positive
MONTENEGRO	Global Economic situation	70	24	6
	National Economic situation-	78	16	6
	HR Market	43.8	52.1	4.2
	Intensified Competition	24.5	59.2	16.3
	Government policy	36	60	4
SERBIA	Global Economic situation	20	75	5
	National Economic situation	70	30	
	HR Market-	30	70	
	Intensified Competition	40	50	10
	Government policy	55	45	
KOSOVO	Global Economic situation	23.8	57.1	19
	National Economic situation	54.5	36.4	9.1
	HR Market	27.3	63.6	9.1
	Intensified Competition-	13.6	81.8	4.5
	Government policy	42.9	47.6	9.5
ALBANIA	Global Economic situation	44.4	44.4	11.1
	National Economic situation	88.9	11.1	
	HR Market	33.3	55.6	11.1
	Intensified Competition	33.3	33.3	33.3
	Government policy	22.2	55.6	22.2
MACEDONIA	Global Economic situation	28.6	71.4	
	National Economic situation	71.4	28.6	
	HR Market	42.9	57.1	
	Intensified Competition	42.9	57.1	
	Government policy	71.4	28.6	

Brain drain

ICT companies from Macedonia, Kosovo and Serbia do think that brain drain has negative influence on their business activities. On the other hand majority of ICT companies from Albania has opposite opinion. In case of Montenegro there is equality between those who think that brain drain can have negative impact on their business and those that think opposite.



Graph 21: Is brain drain influencing negatively your business?



In all countries from the region ICT companies' representatives do think that lack of skilled/qualified workforce is a key barrier for the business operations. The highest percentage of companies considering lack of skilled/qualified workforce is in Albania (77.8%), Kosovo (77.3%), Montenegro (76%) and Serbia 75%.



CONCLUSIONS

The project "South East Europe IT industry barometer" (SEE ITIB 2015) main goals are to support the export capacity of ICT companies in South East Europe. The project aims to collect basic information on ICT companies in the Western Balkan region and to provide an insight into the value of the national ICT market as well as their competitiveness.

Comparative analysis is done based on:

- General information about the companies;
- Export data and trends;
- Statistics considering sales and clients;
- Human Resources –number of employees and their structure;
- Projections –plans of expansion, pro and cons in industry and influence of those on projected plans.

Analysis has shown that companies in all targeted countries have similar trends of development, products, projections and general structure. At the same time, when we look into data about export and trends in that area we can see some differences. Most active in terms of export are companies from Serbia and companies from this country do it through direct contact with client abroad. Even if almost all companies in targeted countries have clients from abroad, they cooperate with those within their countries not by exporting products. Montenegrin ICT companies have lowest percentage of those who are exporting their services/products.

ICT companies' clients within domestic markets are mainly from financial services and telecommunication, after that comes education and technology. Clients abroad are in the field of IT services and outsourcing.

Very important aspect for export and strengthening export capacity are core competitive advantages of companies, what are things that can give them additional recognition on international market. Countries have different positions on that, but on average they say those are price, quality and technical know-how. Additionally, country that is most active in terms of export (Serbia) considers that its strongest point is quality of service.



Major issue for companies in all industries is barriers for their business, including export barriers. For ICT companies in targeted countries most important barriers for building their export capacities are lack of government support and lack of branding of the local IT industry abroad, as well as lack of export oriented trainings and business development/consulting services.

But there are some more basic barriers: visa requirements or finding adequate business contact in targeted market or even costs of exporting and experienced staff to conduct that kind of activities. All these are problems that need to be faced and solved in the near future so that these companies can expand in one of the most profitable industries.

Looking into the plans and projections of ICT companies in targeted countries shows that they have growth plans, and that they are seriously looking into their strengths and weaknesses. They all recognize “brain drain” as one of most important problems for additional development and major negative impact on their business. Positive trend that analysis has shown is that within their expansion plan they project additional employment of IT experts as well as raise of salaries for those employees. At the same time they see national economic situation as important setback for their development.

Finally, ICT companies in targeted countries are very ambitious and they have expansion plans, but while they are focused on clients from abroad they cooperate with those within domestic market not by exporting their services and products. Considering export they are faced with significant barriers which should be targeted on the country level by specific strategies and special policies.



ANNEX 1

How would you evaluate the potential of the following markets for your company's export activities

Montenegro						
	No potential	Very low potential	Low potential	Has potential	High potential	Very high potential
Germany	47.6	21.4	4.8	14.3	9.5	2.4
Austria	45.2	19	7.1	14.3	11.9	2.4
Switzerland	47.6	23.8	4.8	9.5	11.9	2.4
United Kingdom	54.8	19	4.8	11.9	7.1	2.4
France	54.8	21.4	4.8	7.1	9.5	2.4
BeNeLux (Belgium, The Netherlands, Luxemburg)	58.5	14.6	9.8	9.8	4.9	2.4
Scandinavian countries	57.5	20	7.5	5	10	
Southern Europe (Italy, Spain, Portugal)	48.7	17.9	10.3	17.9	2.6	2.6
Regional (Albania, Bosnia and Herzegovina, Bulgaria, Croatia, Greece, Kosovo, Montenegro, Romania, Serbia, Slovenia)	4.8	2.4	4.8	19	35.7	33.3
Central and Eastern Europe	26.8	24.4	17.1	22	9.8	
North America (USA, Canada)	38.1	28.6	16.7	9.5	4.8	2.4
Middle East and Africa	45.2	21.4	9.5	14.3	7.1	2.4
East Asia	63.4	17.1	7.3	4.9	7.3	

Serbia						
	No potential	Very low potential	Low potential	Potential	High potential	Very high potential
Germany			20	15	30	35
Austria			10	25	30	35
Switzerland	5	5	10	25	20	35
United Kingdom		5	10	30	5	50
France	10		20	25	10	35
BeNeLux (Belgium, The Netherlands, Luxemburg)	5	5	10	30	15	35
Scandinavian countries	5		15	25	30	25
Southern Europe (Italy, Spain, Portugal)	15	15	35	5	30	
Regional (Albania, Bosnia and Herzegovina, Bulgaria, Croatia, Greece, Kosovo, Montenegro, Romania, Serbia, Slovenia)		5	20	15	10	50
Central and Eastern Europe		15	15		35	35
North America (USA, Canada)	5		10	25	15	45
Middle East and Africa	10	10	35	15	15	15
East Asia	5	15	20	20	30	10

Kosovo						
	No potential	Very low potential	Low potential	Potential	High potential	Very high potential
Germany	14.8	7.4	11.1	7.4	25.9	33.3
Austria	14.8	14.8	7.4	14.8	29.6	18.5
Switzerland	15.4	3.8	19.2	11.5	19.2	30.8
United Kingdom	19.2	7.7	15.4	11.5	26.9	19.2
France	36	8	20	20	12	4
BeNeLux (Belgium, The Netherlands, Luxemburg)	20	16	12	28	20	4
Scandinavian countries	16.7	12.5	8.3	29.2	25	8.3
Southern Europe (Italy, Spain, Portugal)	26.1	21.7	21.7	17.4	13	
Regional (Albania, Bosnia and Herzegovina, Bulgaria, Croatia, Greece, Kosovo, Montenegro, Romania, Serbia, Slovenia)	14.3		17.9	21.4	21.4	25
Central and Eastern Europe	24	12	28	16	12	8
North America (USA, Canada)	24	12	8	4	24	28
Middle East and Africa	25	20.8	29.2	12.5	12.5	

Albania						
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	No potential	Very low potential	Low potential	Potential	High potential	Very high potential
Germany	14.3			14.3	57.1	14.3
Austria	14.3		14.3	28.6	28.6	14.3
Switzerland			14.3	42.9	28.6	14.3
United Kingdom	14.3	28.6		28.6	14.3	14.3
France	28.6	14.3	14.3	42.9		
BeNeLux (Belgium, The Netherlands, Luxemburg)	14.3	28.6		28.6	14.3	14.3
Scandinavian countries	14.3	28.6	14.3	14.3	14.3	14.3
Southern Europe (Italy, Spain, Portugal)	28.6		28.6	42.9		
Regional (Albania, Bosnia and Herzegovina, Bulgaria, Croatia, Greece, Kosovo, Montenegro, Romania, Serbia, Slovenia)	12.5		12.5	12.5	25	37.5
Central and Eastern Europe	14.3	14.3	42.9	28.6		
North America (USA, Canada)	14.3	28.6	14.3	14.3	14.3	14.3
Middle East and Africa	57.1		28.6	14.3		
East Asia	50	25	25			

Macedonia						
	No potential	Very low potential	Low potential	Potential	High potential	Very high potential
Germany	71.4	28.6				
Austria	28.6	14.3		28.6	28.6	
Switzerland	28.6	14.3		42.9	14.3	
United Kingdom	28.6	14.3		28.6	14.3	14.3
France	28.6	14.3		28.6	14.3	14.3
BeNeLux (Belgium, The Netherlands, Luxemburg)	42.9	14.3	14.3	28.6		
Central and Eastern Europe	42.9	14.3	28.6	14.3		
North America (USA, Canada)		14.3		14.3	42.9	28.6
Middle East and Africa	14.3		14.3	28.6	42.9	
East Asia	33.3		33.3		16.7	16.7



ANNEX 2

Where do you see the biggest export obstacles? (%)

Montenegro						
	Not problematic	Somehow problematic	Little problematic	Problematic	Very problematic	Highly problematic
Market information (lack of suitable information on export markets)	55.6	8.9	13.3	11.1	8.9	2.2
Costs of exporting	46.7	13.3	13.3	13.3	6.7	6.7
Finding the right business partner	30.4	17.4	10.9	23.9	8.7	8.7
Lack of interest/awareness among foreign companies	40.9	13.6	6.8	22.7	6.8	9.1
Lack of technical skills	60	6.7	13.3	6.7	8.9	4.4
Lack of export marketing skills & know-how	46.7	15.6	11.1	11.1	11.1	4.4
Lack of branding of the local IT industry abroad	42.2	4.4	6.7	8.9	15.6	22.2
Culture & language barriers	12	60	10	6	4	8
Lack of support by government institution (export financing schemes, etc.)	6.7	13.3	13.3	20	17.8	28.9
Lack of export-oriented trainings and business development/consulting services	34.1	22.7	11.4	13.6	6.8	11.4
Technical standards and requirements (ISO, CMMI, specific technologies, etc.)	32.6	23.3	23.3	14	2.3	4.7
Legal aspects (contract law in other countries, legal requirements, etc.)	34.1	20.5	18.2	18.2	9.1	
Visa requirements	65.1	20.9	9.3	2.3	2.3	
Lack of qualified staff to conduct export activities	27.3	15.9	15.9	29.5	4.5	6.8
Lack of business contacts in target markets	37.2	14	14	18.6	14	2.3

Serbia						
	Not problematic	Somehow problematic	Little problematic	Problematic	Very problematic	Highly problematic
Market information (lack of suitable information on export markets)	25	25	20	20	10	
Costs of exporting	45	15	20	15	5	
Finding the right business partner	10	15	30	15	20	10
Lack of interest/awareness among foreign companies	10	30	30	5	20	5
Lack of technical skills	60	25	10	5		
Lack of export marketing skills & know-how	30	15	20	20	15	
Lack of branding of the local IT industry abroad	5.6	5.6	22.2	27.8	38.9	
Culture & language barriers	47.4	36.8	10.5	5.3		
Lack of support by government institution (export financing schemes, etc.)	5	20		20	35	20
Lack of export-oriented trainings and business development / consulting services	10.5	31.6	21.1	10.5	21.1	5.3
Technical standards and requirements (ISO, CMMI, specific technologies, etc.)	40	25	20	15		
Legal aspects (contract law in other countries, legal requirements, etc.)	10	50	15	15	10	
Visa requirements	50	35	10	5		
Lack of qualified staff to conduct export activities	45	15	25		15	
Lack of business contacts in target markets		30	25	35		10



Kosovo						
	Not problematic	Somehow problematic	Little problematic	Problematic	Very problematic	Highly problematic
Market information (lack of suitable information on export markets)	18.2	22.7	18.2	18.2	13.6	9.1
Costs of exporting	50	9.1	18.2	4.5	9.1	9.1
Finding the right business partner	8.7	4.3	17.4	26.1	30.4	13
Lack of interest/awareness among foreign companies	4.8	4.8	23.8	23.8	23.8	19
Lack of technical skills	18.2	27.3	27.3	9.1	9.1	9.1
Lack of export marketing skills & know-how	10	35	30	10	15	
Lack of branding of the local IT industry abroad	23.8	23.8	4.8	9.5	14.3	23.8
Culture & language barriers	35	25	20	10	10	
Lack of support by government institution (export financing schemes, etc.)	5	5	20	20	20	30
Lack of export-oriented trainings and business development / consulting services	5	5	35	30	20	5
Technical standards and requirements (ISO, CMMI, specific technologies, etc.)	14.3	23.8	23.8	14.3	23.8	
Legal aspects (contract law in other countries, legal requirements, etc.)	15	25	15	20	10	15
Visa requirements	4.3		8.7	13	21.7	52.2
Lack of qualified staff to conduct export activities		35	20	15	20	10
Lack of business contacts in target markets		9.5	19	14.3	28.6	28.6

Macedonia						
	Not problematic	Somehow problematic	Little problematic	Problematic	Very problematic	Highly problematic
Market information (lack of suitable information on export markets)	42.9		28.6	14.3	14.3	
Costs of exporting	14.3	14.3		14.3	42.9	85.7
Finding the right business partner	14.3	28.6		28.6	28.6	
Lack of interest/awareness among foreign companies	71.4	14.3		14.3		
Lack of technical skills	28.6	14.3	28.6	28.6		
Lack of export marketing skills & know-how	14.3	14.3	28.6	14.3	28.6	
Lack of branding of the local IT industry abroad	28.6	28.6	14.3	28.6		
Culture & language barriers	14.3	42.9		14.3		28.6
Lack of support by government institution (export financing schemes, etc.)	28.6	28.6	28.6		14.3	
Lack of export-oriented trainings and business development / consulting services	57.1	28.6	14.3			
Technical standards and requirements (ISO, CMMI, specific technologies, etc.)	42.9	28.6	14.3		14.3	
Legal aspects (contract law in other countries, legal requirements, etc.)	57.1	14.3		28.6		
Visa requirements	14.3	28.6	28.6	28.6		
Lack of qualified staff to conduct export activities	28.6		14.3	14.3	42.9	



Albania						
	Not problematic	Somehow problematic	Little problematic	Problematic	Very problematic	Highly problematic
Market information (lack of suitable information on export markets)		12.5	37.5	37.5	12.5	
Costs of exporting	40	20	20	20		
Finding the right business partner				85.7	14.3	
Lack of interest/awareness among foreign companies			40		60	
Lack of technical skills		28.6	14.3	42.9	14.3	
Lack of export marketing skills & know-how			60	20	20	
Lack of branding of the local IT industry abroad		20		40	20	20
Culture & language barriers	40	60				
Lack of support by government institution (export financing schemes, etc.)		33.3		33.3	16.7	16.7
Lack of export-oriented trainings and business development / consulting services	20	20		40	20	
Technical standards and requirements (ISO, CMMI, specific technologies, etc.)	16.7	16.7	16.7	50		
Legal aspects (contract law in other countries, legal requirements, etc.)		28.6	28.6	28.6	14.3	
Visa requirements	60	20	20	40	20	
Lack of qualified staff to conduct export activities		40		40	20	
Lack of business contacts in target markets		16.7	16.7	33.3	16.7	16.7

Clients enterprise - Domestic market (%)

	Montenegro	Serbia	Albania	Macedonia	Kosovo
Aerospace	12	X	11.1	14.3	2.5
Automotive	28	X	11.1	28.6	2.5
Defence	22	X	11.1	57.1	5
Education	36	X	66.6	57.1	27.5
Financial services	56	X	44.4		17.5
Gaming and Entertainment	32	X		28.6	12.5
Healthcare Services	22	X	11.1	28.6	10
Households-domestic market	42				2.5
Industry	50	X	22.2	28.6	2.5
IT Services and Outsourcing	56	X	33.3	14.3	40
Press and Media	32	X	11.1	85.7	10
Manufacturing, Distribution, Retail	38	X	33.3		7.5
Marketing and Communications					15
publishing house-domestic market	18	X	33.3		15
Non-profit organizations	34	X	22.2		12.5
Public sector (E-Government)	38	X	22.2	42.8	17.5
Real Estate	24	X	22.2	28.6	7.5
Services (HR, accounting, legal)	34	X		28.6	15
Technology	26	X	55.5		27.5
Telecommunications (wireless and mobile)	54	X	22.2		22.5
Telematics	8	X	11.1	14.3	2.5
Tourism and Hospitality	50	X	11.1	14.3	12.5
Trade, transport and logistics	44	X	11.1		5
Utilities	26	X	11.1	14.3	7.5



Clients enterprise-International Market (%)

	Montenegro	Serbia	Albania	Macedonia	Kosovo
Aerospace		X	11.1	28.6	2.5
Automotive		X	11.1	14.3	5
Defence		X	11.1		2.5
Education	4	X	11.1	57.1	5
Financial Services	2		11.1	14.3	2.5
Gaming and Entertainment	2		11.1		10
Healthcare Services	4		22.2	14.3	5
Household			11.1		7.5
Industry	4		11.1	14.3	7.5
IT services and outsourcing	14		44.4	42.8	18.75
Manufacturing, Distribution, Retail-domestic market	8		11.1	14.3	
Publishing house				14.3	46.9
Press and Media	2		11.1	14.3	2.5
Non-profit organizations			22.2	14.3	2.5
Public sector e - government			11.1	14.3	
Real Estate	4		11.1	14.3	6.2
Technology-	2			28.3	12.5
Services (HR, accounting, legal)	6		22.2		5
Telecommunications (wireless and mobile) -Domestic market	4				7.5
Telematics			11.1		
Tourism and Hospitality	4		11.1		
Trade, transport and logistics	2		11.1		2.5
Utilities			22.2		5



ANNEX 3

What products / services you provide to your customers-Domestic market (%)

	Montenegro	Serbia	Albania	Macedonia	Kosovo
Business Intelligence/Data Warehousing	22	25	22.2		17.5
Business Process Optimization	14	40	33.3		7.5
Corporate Security	14	10	44.4	42.8	10
Custom Development / Outsourcing	18	55	22.2	42.8	17.5
Customer Management (CRM)	14	40	44.4	28.6	15
Document Management	26	25	33.3	28.6	15
E-Commerce	18	40	22.2	57.1	7.5
Embedded Engineering and Development	8	5	77.7	57.1	2.5
ERP / Supply Chain	8	40	66.6	42.6	12.5
IT Consulting	40	45	44.4	42.6	37.5
IT Project Management	38	60	44.4		22.5
Knowledge Management/Operations	10	30		42.9	2.5
Navigation Applications	8		22.2	14.3	
Mobile Solutions	30	35		57.1	17.5
New Media Production (Multimedia / Web animations)	6	10	44.4	14.3	2.5
Product maintenance, Support and Customization	38	30	33.3		10
Software Quality Assurance	16	15	11.1		10
Tools / COTS	14	5	44.4	42.8	2.5
Web design; development	34	40		42.8	25
Other				71.4	

What products / services you provide to your customers-International Market (%)

	Montenegro	Serbia	Albania	Macedonia	Kosovo
Business Intelligence / Data Warehousing	6	15			2.5
Business Process Optimization	6	25		42.8	5
Corporate Security	4			14.3	2.5
Custom Development / Outsourcing	8	75			12.5
Customer Management (CRM)	6	20	11.1	57.1	12.5
Document Management	6	5	11.1	14.3	2.5
E-Commerce	4	30			7.5
Embedded Engineering and Development		15	11.1	14.3	2.5
ERP / Supply Chain	4	10	11.1	14.3	
IT Consulting	6	45		14.3	12.5
IT Project Management	6	45		42.3	7.5
Knowledge Management / Operations	4	20	11.1	14.3	
Mobile Solutions	4	35	11.1	14.3	22.5
Navigation Applications	2		11.1	14.3	5
New Media Production (Multimedia / Web animations)	2	10	11.1	14.3	12.5
Product maintenance, Support and Customization	6	30	22.2		15
Software Quality Assurance	4	10		14.3	10
Tools / COTS		5	22.2	14.3	
Web design; Development	6	35			22.5
Other 1 (specify)				28.5	



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Annex 4: Questionnaire (version on Montenegrin language)



South-East Europe IT Industry Barometer (SEE ITIB) 2015

Naziv preduzeća _____	Anketar _____
Web sajt _____	Datum
Kontakt osoba, funkcija u preduzeću i e-mail	anketiranja _____

Dio 1: O PREDUZEĆU

1. U kojoj zemlji se nalazi sjedište Vašeg preduzeća?

Napomena: Ukoliko imate predstavništva u više zemalja navesti zemlju u kojoj se nalazi sjedište firme.

1. Crna Gora
2. Bosna i Hercegovina
3. Kosovo
4. Makedonija
5. Albanija
6. Srbija

2. Kakva je vlasnička struktura preduzeća?

Napomena: Zaokružiti samo jedan odgovor.

1. Više od 50% u domaćem vlasništvu
2. Više od 50% u stranom vlasništvu
3. Ogranak stranog privrednog društva (Ako firma radi samo za matičnu kompaniju ili za druge kompanije koje pripadaju grupi)

3. Koje vrste proizvoda i/ili usluga pruža Vaše preduzeće?

Napomena: Mogućnost davanja više odgovora.

1. Softver
2. Softver/IT usluge
3. Hardver
4. Usluge u oblasti hardverskih proizvoda
5. Ostalo _____

4. Da li je Vaše preduzeće član neke od navedenih asocijacija?

1. Crna Gora: IT Cluster
2. Bosna i Hercegovina: BIT Alliance
3. Kosovo: STIKK
4. Makedonija: MASIT
5. Albanija: AITA
6. Srbija: ICT Network
7. Nismo članovi nijedne ICT asocijacije
8. Drugo _____

5. Godina osnivanja preduzeća: _____

6. Koje operativne sisteme i platforme koristite?

Napomena: Mogućnost davanja više odgovora.

1. Windows
2. Realtime Systems
3. MAC-OS
4. OS/400
5. SUN OS, Solaris
6. iOS
7. Android
8. Windows Mobile
9. Linux
10. UNIX
11. Drugo _____

7. Programski jezici i razvojni alati

Napomena: Mogućnost davanja više odgovora.

1. ABAP4
2. Assembler
3. Basic - Visual Basic, VBA etc.
4. C
5. C++
6. Clipper
7. CLIST
8. CL/400 - AS/400 Control Language
9. Cobol
10. CORBA IDL
11. dBase
12. Delphi
13. Eiffel
14. ESQL/C
15. Fortran
16. Foxpro
17. Gupta, Centura

18. HTML, XML
19. ILE/400
20. Java, JavaScript
21. JCL
22. Lisp
23. Lotus Notes Script
24. Macro Languages- ostalo
25. Natural
26. .NET
27. Objective C
28. Pascal
29. Perl
30. PHP
31. PL/SQL
32. PL/1
33. Powerbuilder
34. Python
35. QMF
36. Rexx
37. RPG
38. SAS
39. Script Languages - ostalo
40. Shell - C-Shell, K-Shell, Bourne-Shell
41. Smalltalk
42. Tcl/Tk
43. Visual Objects
44. VRML
45. Xt, Motif
46. yacc/lex
47. 4gl
48. Drugo _____

8. Baze podataka

Napomena: Mogućnost davanja više odgovora.

1. Access
2. Adabas
3. BTRieve
4. DAO
5. DB2
6. DB/400
7. DL/1
8. Gupta, Centura
9. IDMS
10. IMS
11. Informix
12. Ingres
13. Interbase
14. ISAM
15. JDBC
16. Lotus Notes
17. MS SQL Server
18. mSQL/mysql
19. Object Store
20. ODBC
21. Oracle
22. Paradox
23. POET
24. Progress
25. RDB
26. SAS
27. SESAM
28. SQL
29. Sybase
30. UDS/IDMS
31. VSAM
32. xBase - dBase, FoxPro, Clipper...
33. 4th Dimension
34. Drugo _____

9. Da li je Vaše preduzeće sertifikovano prema jednom od sledećih standarda kvaliteta?

Napomena: Mogućnost davanja više odgovora.

1. ISO 27001
2. ISO 20000
3. ISO9001
4. CMM / CMMI
5. ITMark



6. SPICE
7. Drugo _____

10. Da li Vaši zaposleni imaju neki od sledećih tehničkih sertifikata?

Napomena:

1. Project management professional certification (PMP)
2. Agile/Scrum
3. Microsoft certifikat
4. Drugo _____

Dio 2: IZVOZ

11. Da li Vaše preduzeće posluje sa međunarodnim firmama-partnerima unutar zemlje?

1. Da
2. Ne

12. Da li se Vaše preduzeće bavi izvozom?

1. Da
2. Ne - (**Idi na pitanje 15**)

13. Na koji način vršite izvoz proizvoda/usluga? (Molimo Vas da navedete svoje kanale izvoza)

Napomena:

1. Direktni izvoz iz Vaše zemlje do klijenta u inostranstvu
2. Filijala na ciljnom tržištu
3. Predstavništvo
4. Distributer-partner/Lokalni partner (agent prodaje, predstavnik prodaje, jedini distributer)
5. Putem Interneta
6. Ostalo _____

14. Koje su ključne konkurentske prednosti Vašeg preduzeća na međunarodnom tržištu?

Napomena:

1. Cijena
2. Kvalitet
3. Tehnički know-how
4. Know-how
5. Horizontalni know-how
6. Strani jezici
7. Ostalo _____

15. kada su u pitanju izvozne aktivnosti Vašeg preduzeća?

Napomena: Molimo vas da procenite izvozni potencijal svakog tržišta, čak i ako trenutno možda ne bi izvozili u tu zemlju/tržište.

	Nema potencijal (-3)	Veoma nizak potencijal (-2)	Nizak potencijal (-1)	Potencijal (+1)	Visoki potencijal (+2)	Veoma visok potencijal (+3)
Njemačka						
Austrija						
Švajcarska						
Velika Britanija						
Francuska						
Beneluks (Belgija,						

Holandija, Luksemburg)							
Skandinavske zemlje							
Južna Evropa (Italija, Španija, Portugalija)							
Regionalni (Albanija, Bosna i Hercegovina, Bugarska, Hrvatska, Grčka, Kosovo, Crna Gora, Rumunija, Srbija, Slovenija)							
Centralna i Istočna Evropa							
Sjeverna Amerika (SAD, Kanada)							
Bliski Istok i Afrika							
Istočna Azija							
Ostalo (navedite ispod naziv zemlje)							

Nešto drugo: _____

16. Koja znanja stranih jezika postoje u Vašem preduzeću?

Napomena:

1. Engleski
2. Njemački
3. Turski
4. Italijanski
5. Španski
6. Francuski
7. Ostalo _____

17.

Napomena: Molimo Vas da ocijenite različite prepreke u izvozu.

	Nije problematično (+1)	Donekle problematično (+2)	Malo problematično (+3)	Problematično (+4)	Veoma problematično (+5)	Visoko problematično (+5)	Ostalo navedite ispod
informacija o izvoznim tržištima)							
Troškovi izvoza							
Pronalaženje odgovarajućeg poslovnog partnera							
Nedostatak interesovanja/svijesti među stranim kompanijama							
Nedostatak tehničkih vještina							
Nedostatak marketinških vještina i znanja o							



izvozu							
Nedostatak brendiranja lokalne IT industrije u inostranstvu							
Kulturne i jezičke barijere							
Nedostatak podrške od strane Vlade (institucije za finansiranje izvoza)							
Nedostatak obuka u oblasti izvoza/konsultantskih usluga							
Tehnički standardi i zahtjevi (ISO, CMMI, specifične tehnologije)							
Pravni aspekti (ugovor sa drugim zemljama, zakonski uslovi)							
Vizni režim							
Nedostatak kvalifikovanih kadrova za obavljanje izvoznih aktivnosti							
Nedostatak poslovnih kontakata u ciljnim tržištima							
Ostalo (navedite ispod)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Ostalo: _____

Dio 3: STATISTIKE

18. Koliki je bio promet Vašeg preduzeća u 2013. godini? _____

19. Koliki je bio promet Vašeg preduzeća u 2014. godini? _____

20. Koje su projekcije prometa za 2015. godinu? _____

21. Molimo Vas da popunite tabelu informacijama o ukupnom izvozu izrečenom u % ili cifrom.

Napomena: Molimo Vas da unesete i prognozu za 2015. godinu

	Ukupan izvoz (cifra)	% izvoza u EU
2013		
2014		
2015(prognoza)		

22. Koliki je bio procenat izvoza između Vaših proizvoda i IT usluga?

Napomena: Ukoliko niste imali izvoza u toku određene godine unesite 100 u (N/A).

Napomena: (suma svake linije/godine mora biti 100)

	IT usluge	Proizvodi	N/A
2013			
2014			
2015(prognoza)			

23. U dato polje označiti koji su Vaši klijenti?

	Domaće tržište	Međunarodno tržište
Vazdušni saobraćaj (avio-kompanije)		
Saobraćaj		
Obrana		
Obrazovanje (E-učenje)		
Finansijske usluge		
Igre i zabava		
Zdravstvene usluge		
Domaćinstva		
Industrija		
IT usluge i Outsourcing		
Proizvodnja, distribucija, maloprodaja		
Izdavačke kuće		
Mediji i štampa		
Neprofitne organizacije		
Javni sektor (e - vlada)		
Nekretnine		
Usluge (HR, računovodstvene, pravne)		
Tehnologija		
Telekomunikacije (bežične i mobilne)		
Telematika		
Turizam i hotelijerstvo		
Trgovina, transport i logistika		
Komunalne usluge		
Drugo 1 (navedite ispod)		
Drugo 2 (navedite ispod)		

Drugo 1: _____

Drugo 2: _____

24. Koje proizvode/usluge pružate Vašim klijentima?

	Domaće tržište	Međunarodno tržište
Business Intelligence/Data Warehousing		
Business Process Optimization		
Corporate Security		
Custom Development/Outsourcing		
Customer Management (CRM)		
Document Management		
E-commerce		
Embedded Engineering and Development		
ERP/Supply Chain		
IT Consulting		
IT Project Management		



Knowledge Management/Operations		
Mobile Solutions		
Navigation Applications		
New Media Production (Multimedia/Web animations)		
Product maintenance, Support and Customization		
Software Quality Assurance		
Tools/COTS		
Web design; development		
Drugo (navesti)		
Drugo (navesti)		

Drugo 1: _____

Drugo 2: _____

Dio 4: LJUDSKI RESURSI

25. Koliki je ukupni broj Vaših zaposlenih i saradnika?

- 2014 _____
- 2015 (prognoza) _____

26. Navedite broj zaposlenih koji napuste kompaniju na godišnjem nivou?

- >10%
- 10-25%
- <25%

27. Koliki je prosječni vremenski period potreban za promjenu zaposlenih koji napuste kompaniju?

- > 3 mjeseca
- 3-6 mjeseci
- < 6 mjeseci
- Drugo: _____

28. Koje su prosječne mjesečne bruto zarade (po ugovoru o radu) za slede

	2014
Developers	
Graphic Designers	
Database Administrators	
System administrator	
Business Developer Management	
Project Managers	
Marketing / Sales	
Administration	
Drugo	

29. U kom iznosu plaćate sledeće kategorije zaposlenih?

Napomena: Molimo vas da navedete cijene po osobi u EUR po satu. Ako nemate cijene, upišite nulu.

- Developers _____
- Graphic Designers _____
- Database Administrators _____
- Sistem administratori _____
- Business Developer Management _____
- Project Managers _____

- Blended Rate-(Blended Rate is the rate that you would quote your services to a client, should you have to provide one number for that.

Dio 5: PROJEKCIJE

30.

kompaniji: (Uključujući puno radno vrijeme i part-time/free-lance zaposlene)

	Smanjiti			±0%	Povećati		
	-50%	-25%	-10%		+50%	+25%	+10%
Broj zaposlenih							

31. Da li očekujete da će se nivo plata:

	Smanjiti			±0%	Povećati		
	-50%	-25%	-10%		+50%	+25%	+10%
IT stručnjaci							
Drugo							

32.

	Negativan	Neutralan	Pozitivan
Globalna ekonomska situacija			
Ekonomska situacija u zemlji			
Tržište radne snage			
Rastuća konkurencija			
Vladina politika			

33. Da li "odliv mozgova" negativno utiče na Vaš posao?

- Da
- Ne

34. Da li smatrate da postoji deficit stručne/kvalifikovane radne snage u Crnoj Gori?

- Da
- Ne
- Komentar: _____

35. Iskoristite prostor da date Vaše komentare i sugestije o pitanjima koja ocjenjujete kao važna za Vaše preduzeće. Uzmite u obzir rad čitavog IT sektora, podrške, asocijacije, Vlade i slično. Komentari, prigovori, sugestije su takođe dobrodošli.

**HVALA NA VREMENU ODVOJENOM ZA
POPUNJAVANJE UPITNIKA!**