



**KOSME**  
Kosovo SME Promotion Programme

Provision of Capacity Development to Ministry of Trade and Industry  
Financed by Austrian Development Cooperation and Swiss Development Cooperation  
Co-financed by Ministry of Trade and Industry, Republic of Kosovo  
Implemented by ECIKS/KMU Forschung Austria

# *A Capacity Scan of Business Consultants in Kosovo*

July 2013



with funding from

 **Austrian**  
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Schweizerische Eidgenossenschaft  
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## List of abbreviations

ADA	Austrian Development Agency
ADC	Austrian Development Cooperation
BAS	Business Advisory Services
BCC	Business Consultants Council
BSCK	Business Support Centre Kosovo
CMC	Certified Management Consultants
EBRD	European Bank for Reconstruction and Development
ECIKS	Economic Initiative for Kosovo
EU	European Union
GoK	Government of the Republic of Kosovo
ICMCI	International Council of Management Consulting Institutes
KAS	Kosovo Agency of Statistics
KBRA	Kosovo Business Registration Agency
KOSME	Kosovo Small and Medium Enterprises Promotion Program
MTI	Ministry of Trade and Industry
NGO	Non-Governmental Organisation
PR	Public Relations
SDC	Swiss Development Cooperation
SMEs	Small and Medium enterprises
SMESA	Small and Medium Enterprises Support Agency
TAM BAS	TurnAround Management (TAM) and Business Advisory Services (BAS) Program of EBRD
USAID	United States Agency for International Development
UNDP	United Nation Development Program
VCS	Voucher Counselling Scheme

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## Introduction

The present report was drawn up in the frame of the **Kosovo SME Promotion Programme (KOSME)**, a project which was launched in 2012 with the aim of promoting - in various ways - small and medium-sized enterprises in Kosovo and providing capacity development to the Kosovar Ministry of Trade and Industry (MTI). The project is financed by the Austrian and the Swiss Development Cooperation (ADC, SDC), co-financed by the MTI and implemented by the Economic Initiative of Kosovo (ECIKS) and KMU Forschung Austria. An important component of KOSME is to **advance the market of consulting services for SMEs in Kosovo**, in particular through

- **re-establishing a voucher counselling scheme for SMEs (SME Voucher 2013)** and
- supporting the **formation of the Business Consultants Council (BCC)**.

In order to appropriately shape the above mentioned support for the consulting services market, it requires an in-depth understanding of the **activities of business consultants in Kosovo and the consultancy services they provide, their views on the Kosovar consulting market, the skills and capacities they need, and what they think about the establishment of the Business Consultants Council BCC and re-establishing a voucher counselling scheme.**

According to a feasibility study by KOSME (2013)<sup>1</sup>, there is a broad variety of consultants in Kosovo, including a certain segment of management/business consultants. These may number in the hundreds. During the last two phases of the previous SME Voucher system (2006 – 2010), some 270 have been registered at the Kosovar Ministry of Trade and Industry (MTI) as being qualified to provide services. The EBRD has qualified about 100 consultants under its own procedures. Most of them are individual consultants, while there are also a couple of consultancy firms; some of these have an annual turnover of more than a million Euros. The business consultancy market is said to offer only a limited range of services. Also, a major part of the consultancy market is oriented towards donor-funded technical assistance to the public sector and less to SMEs. Some 28 consultants have been CMC certified with support from EBRD SBS<sup>2</sup>, funded by the Netherlands Government. Former TAM BAS project consultancy fees ranged from € 50 to 150 per day. The lower end was the standard fee under the previous voucher scheme and the higher end is what CMC certified consultants are charging.

The Kosovo SME Strategy<sup>3</sup> highlights the need for trainings and consulting services as an important measure in private sector development. The national SME Strategy foresees the development of a

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<sup>1</sup> KOSME (2013): SME Voucher Counselling Scheme. Feasibility Study. Towards a working market for business services providers for Kosovo SMEs. Study in the frame of the KOSME project

<sup>2</sup> The certification was carried out in cooperation with USAID, the International Council of Management Consulting Institute (ICMCI) and a CMC-certified consulting company from Macedonia.

<sup>3</sup> Government of Kosovo (2011): SME Strategy Development of Kosova. 2012-2016 with vision 2020.



vibrant market for business consultancy services with a business consultants association as key market player.

## Methodology

Among the community of business consultants in Kosovo, an online survey was conducted. The survey was available in **Albanian, Serbian and English** in order to make sure that as many business consultants as possible could be reached. The survey took place from 22 March 2013 to 3 April 2013.

The business consultants were addressed via E-Mail as follows:

- List of accredited consultants of MTI - 249 persons in this list could be addressed via E-Mail
- List of consultants of EBRD – EBRD was so kind to provide a list with 112 E-Mail addresses both from individual business consultants and consulting firms

A personalised e-mail with a link to the online-questionnaire was sent out to these 361 business consultants and consulting firms. However, it must be noted that the current list of accredited consultants of MTI (drawn up in 2010) is not up-to-date in terms of e-mail addresses. The personalised e-mail could not be delivered to a considerable number of business consultants<sup>4</sup>. However, additionally, a link to the online-questionnaire was circulated among the business consultants community via various networks and relevant agents in order to increase the response rate and to receive also responses from business consultants not listed at MTI and EBRD.

In total, 96 business consultants responded to the online survey and filled in the questionnaire. From these, the answers of 84 business consultants could be used in the analysis (the others were too incomplete to be included in the analysis). In comparison with the usual response rate of around 10 % experienced in other online surveys, the response rate of the consultants capacity scan was quite satisfactory at around 25 %.

## Personal characteristics of the respondents

The typical Kosovar business consultant is **male**: the majority of the 84 surveyed business consultants (72.6 %) are men. The share of female business consultants among the respondents is 17.9 %. 9.5 % of the respondents did not provide any information on this issue.

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<sup>4</sup> Approximately 25 % of the e-mail addresses did not exist anymore.



According to table 1, **most respondents are between 35 and 54 years old**: 38.1 % are between 35 and 44 years, and further 33.3 % are between 45 and 54 years old. Only a small percentage (13.1 %) is younger, i.e. between 25 to 34 years old.

**Table 1** Age groups of the surveyed business consultants

Age groups	% of business consultants
25 to 34 years	13.1
35 to 44 years	38.1
45 to 54 years	33.3
55 years and older	6.0
No answer	9.5
Total (N=84)	100

Source: KOSME Business Consultants Capacity Scan, 2013

From the 84 respondents, 93 % filled in the questionnaire in **Albanian language**, followed by 6 % in Serbian language. These percentages are similar to the general ethnic distribution of people in Kosovo. According to the Kosovo Agency of Statistics (2003), 88 % are Albanian, 7 % are Serbian and 5 % belong to other ethnic groups (Muslims/Bosniaks, Roma and Turks). 1 % of the respondents even used the English language when filling in the questionnaire.



## 1 Business consultancy services provided

As shown in table 2, the majority of the respondents (72.6 %) have been **working as a business consultant for more than five years** (starting year 1991 to 2007), and around 40 % even for more than ten years (starting year 1991 to 2003). There is a considerable share of business consultants (34.5 %) who took their jobs especially after the Kosovo War (2000 to 2003).

Table 2 Starting year for working as a business consultant

Starting year	% of business consultants
1991 to 1999	6.0
2000 to 2003	34.5
2004 to 2007	32.1
2008 and after	22.6
No answer	4.8
Total (N=84)	100

Source: KOSME Business Consultants Capacity Scan, 2013

The majority of the surveyed business consultants (57.1 %) are working as a **freelancer or self-employed consultant**, while more than one third (38.1 %) are working for a business consulting company. The remaining respondents did not provide any information on this issue.

In terms of the **geographical distribution of business consultants** in Kosovo, the survey results reveal the **supremacy of Prishtina / Priština**: Nearly two thirds of the business consultants (64.3 %) are located in the capital of Kosovo. As pointed out in KOSME (2013), this most likely reflects the demand by businesses in and around the capital but also the geographical business focus of previous projects. Prishtina / Priština is followed by Mitrovicë / Mitrovica (7.1 %), Ferizaj / Uroševac (4.8 %), Gjakovë / Djakovica and Gjilan / Gnjilane (each 3.6 %). Only 1.2 % of the respondents are from Prizren / Prizren, which seems to be underrepresented in this study when taking into account the fact that it is the second largest city in Kosovo.

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**Table 3 Areas in which business consultants provide their business consultancy services**

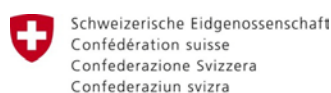
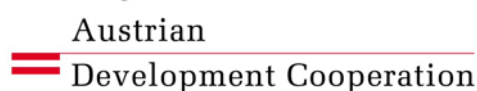
Areas	% of business consultants who stated that this area is “very important” or “important” within their overall consulting activities
Business planning / business plan preparation	79.8
Management, leadership	79.8
Training of company staff	77.4
Marketing and sales / public relations	72.6
Establishing / developing business contacts and co-operations with markets in Kosovo	69.0
Start-up / formation of a business	67.9
Financial management / accounting / taxes	57.1
HR management / recruiting	56.0
International business / export / developing linkages to export markets	53.6
Innovation of products / processes	50.0
Information and communication technology	48.8
Quality assurance / standards and norms (e.g. ISO)	47.6
Gender mainstreaming, equal opportunities, diversity management	45.2
Developing value/supply chains	44.0
Inclusive growth, making markets work for the poor	42.9
Engineering / production processes	35.7
Legal issues, contracts, regulations	34.5
Total (N=84)	

Note: As multiple answers were possible, the shares do not add up to 100%.

Source: KOSME Business Consultants Capacity Scan, 2013

Much has been said about the limited range of services business consultants are providing in Kosovo in the recent years. In the frame of the survey, it was therefore an important issue to look at the range of these services. Table 3 lists the **areas in which the business consultants provide their services** according to the share of business consultants who stated that this area is “very important”

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or “important”<sup>5</sup> within their overall consulting activities. The vast majority of the business consultants state that, in particular, **services related to the overall business management** are very important or important, i.e. *business planning / business plan preparation* as well as services in the field of *management and leadership* (79.8 % each). Around two thirds of the consultants count *the start-up or the formation of a business* (67.9 %) among their very important or important services they provide. Furthermore, services related to more specific fields within a business, such as *training of the company staff* (77.4 %) or *marketing and sales / public relations* (72.6 %) are frequently mentioned. The *establishment and the development of business contacts and co-operations with markets in Kosovo* (69.0 %) is also a field with major importance within the overall activities of business consultants.

The shares are considerably lower in areas which are seen to be **innovative** approaches for stimulating private sector development: gender mainstreaming, equal opportunities, diversity management (45.2 %), developing value/supply chains (44.0 %) and inclusive growth, making markets work for the poor (42.9 %). Not even half of the respondents are providing services in these areas. At the bottom of the list, areas such as engineering / production processes (35.7 %) or legal issues / contracts / regulations (34.5 %) are found.

Additional important areas which were not listed in the questionnaire but mentioned by the business consultants include the *conduction of audits, market research*, implementing projects for e.g. *youth and females* as well as *internal and external networking* and the *promotion of companies in trade and business platforms*.<sup>6</sup>

Based on the survey’s responses, the **typical clients** of business consultants in Kosovo are **domestic businesses with 1 to 49 employees** (see table 4): 72.6 % of the business consultants provide services to domestic micro-enterprises with 1 to 9 employees and 71.4 % also to domestic small businesses with 10 to 49 employees. Furthermore, about 60 % have NGOs among their clients. Slightly more than one half of the business consultants (53.6 %) serve the needs of domestic self-employed (without employees). It is interesting that a considerable share of consultants (42.9 %) provide services to international organisations.

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<sup>5</sup> The business consultants had to indicate if the areas are „very important“, „important“, „less important“ or „not relevant“.

<sup>6</sup> As the business consultants had to describe these additional important areas very briefly only, we do not have any detailed information on these activities.



**Table 4 Types of clients of business consultants, average number of clients within a year and average share of the business consultants' total business (revenue)**

Types of clients	% of business consultants providing services to these clients (N=84)	Average number of clients within a year (median <sup>1</sup> ) (N=84)	% of the total business (revenue) of the business consultants (mean <sup>2</sup> ) (N=56 <sup>3</sup> )
Domestic self-employed (no employees)	53.6	10	12.6
Domestic micro-enterprises (1-9 employees)	72.6	6	23.3
Domestic small businesses (10-49 employees)	71.4	5	17.9
Domestic medium/large businesses (50 and more employees)	48.8	4	10.9
Foreign-owned businesses	47.6	2	6.9
NGOs	60.7	4	10.1
Associations of businesses / producers	33.3	2	1.9
Governmental institutions	39.3	2	5.8
International organisations	42.9	3	10.6
Total	100	22	

Note: As multiple answers were possible, the shares do not add up to 100%.

<sup>1</sup> Median: The median is an average value; 50% of the given responses are below this value and 50% of the given responses are above this value. The calculation of each median is based only on those responses where the consultants indicated to have at least 1 customer or more for this respective type of client.

<sup>2</sup> Mean: The mean is an average value equivalent to the arithmetic mean. The calculation of each mean is based on all responses, including those consultants stating to generate 0% of the total business (revenue) for this respective type of client.

<sup>3</sup> 56 business consultants (out of 84) provided information on this issue.

Source: KOSME Business Consultants Capacity Scan, 2013



Irrespective of the type of clients, the business consultants’ overall **average number of clients** within a year is around 22<sup>7</sup>. Typically, the business consultants do not serve only one type of client but several different types of clients. However, when taking into account the single types of clients, the average number of clients varies considerably – on the one hand, there is a correlation between the shares of business consultants providing services to specific types of clients, the average number of clients within a year and **the share of the total business (revenue)** the consultants generate with a specific type of client: The higher the share of consultants providing services to a specific type of client, the higher is the average number of clients within this type and the higher is also the share of the total business (revenue) related to this specific type of client. This simply reflects the overall number of organisations (the potential client base) existing in Kosovo in each client category.

On the other hand, the different dimensions of services provided by the business consultants to each client group are also reflected in these figures: For instance, the average number of clients in the field of the *domestic self-employed* is around 10 while the revenue generated from serving this type of client is only about 12.6 %.

**Table 5 Share of women among the clients of business consultants**

<b>Female clients</b>	<b>% of business consultants</b>
No female clients	7.1
Less than 20%	25.0
20 to 39%	33.3
40% and more	21.4
No answer	13.1
Total (N=84)	100

Note: Due to rounding errors, the shares do not add up exactly to 100%.

Source: KOSME Business Consultants Capacity Scan, 2013

The **share of women among the clients of business consultants** varies according to the statements of the surveyed consultants (see table 5): 7.1 % stated to have no female clients at all, while after all, a quarter of the consultants declared that the share of female clients is up to 20 %. Around one third said that 20 to 39 % of their clients are women and further 21.4 % explained to have even 40 % and more female clients. It was analysed if there is a correlation between the share of women among the consultant’s clients and the sex of the business consultants in order to find out if it is the female

<sup>7</sup> The average value was calculated as median, i.e. 50% of the given responses are below this value and 50% of the given responses are above this value.



consultants who have more female clients, but there was no statistical significance – therefore, no correlation could be identified.

**Table 6 Sectors clients of business consultants mainly belong to**

Sectors	% of business consultants having clients in this sector
Production of food, beverages and tobacco products	52.4
Education and qualification	50.0
Hotels and restaurants	47.6
Information and communication	47.6
Wholesale and retail trade, repair of vehicles and motorcycles, repair of equipment for personal and home use	45.2
Construction	44.0
Agriculture, hunting and forestry, fishing	40.5
Financial and insurance activities, financial mediation	36.9
International organisations and bodies	32.1
Personal services (e.g. cleaning, hairdressing, physical wellbeing)	26.2
Transportation and storage	23.8
Handicrafts (artistic, traditional and utilitarian handicraft products)	22.6
Public administration and defence, compulsory social insurance	19.0
Business with real estate, renting and leasing and other business services	16.7
Health and social care	10.7
Supplying with electrical energy, gas and hot water	9.5
Manufacturing (e.g. wood, textile, metal and chemical products)	7.1
Mining industry (coal, lignite and poor mineral stratum)	6.0
Total (N=84)	

Note: As multiple answers were possible, the shares do not add up to 100%.

Source: KOSME Business Consultants Capacity Scan, 2013

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The Kosovar business consultants were asked to what **sectors their clients belong to** (table 6): Around one half of the surveyed business consultants have clients in the sector *production of food, beverages and tobacco products* (52.4 %) – the highest demand for consulting services seems to be in this sector. The sector *education and qualification* (50 %) ranks second. Most likely this can be explained by the fact that a number of consultants are engaged by donor-funded programmes to provide training in entrepreneurship and starting up a business for their clients. Further sectors of relevance are *hotels and restaurants* and *information and communication* (each 47.6 %). The sector *supplying with electrical energy, gas and hot water*, the *manufacturing* sector (e.g. wood, textile, metal and chemical products) and the *mining industry* (coal, lignite and poor mineral stratum) seem to be of limited relevance for the business consultants: less than 10 % have these sectors among their clients.

The sectors mentioned most frequently by the business consultants very roughly reflect also the main business sectors in Kosovo: according to the SME Annual Report 2011 by SMESA, registered businesses in Kosovo distribute mainly among *wholesale trade, retail trade and repair* (45.6 %), *transportation, storage and communication* (13 %), *hotels and restaurants* (9.4 %), the *production of food, beverages and tobacco products* (9 %) and *construction* (6.6 %).

Apart from serving businesses in Kosovo, more than one third of the consultants (39.9 %) also provide their services outside Kosovo.

The business consultants were also asked about the **duration of their assignments** and the **daily fee rate** they apply (table 7): On average, the number of working days per business consultancy is 10 days, while the daily fee rate applied for business consulting is about € 120.

**Table 7 Average number of working days per business consultancy assignment and average daily fee rate for business consulting (in €)**

	Average values
Number of working days per business consultancy assignment (N=79)	10 days (median <sup>1</sup> )
Daily fee rate applied for business consulting (in €, N=73)	€ 120 (median)

Note: Not all 84 respondents provided information on these issues. The actual number of respondents is therefore put in parentheses.

<sup>1</sup> Median: Average value, 50% of the given responses are below this value and 50% of the given responses are above this value.

Source: KOSME Business Consultants Capacity Scan, 2013

In Kosovo, **business consultancy services are subsidized / co-financed to a considerable extent by public or donor support schemes**: According to table 8, around two thirds (66.7 %) of the business consultants say that their services provided to private firms in Kosovo are subsidized or co-financed –

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be it in some (41.7 %) or in most cases (25.0 %). One quarter of the surveyed consultants (27.4 %) explained that their consultancy services are never subsidized or co-financed in any way.

**Table 8 Subsidisation and co-financing of business consultancy services by public or donor support schemes**

Subsidisation or co-financing	% of business consultants
Yes, mostly	25.0
Yes, in some cases	41.7
Never	27.4
No answer	6.0
Total (N=84)	100

Note: The respondents were asked to assess the degree of subsidization / co-financing of their business consultancy services provided to private firms.

Due to rounding errors, the shares do not add up exactly to 100%.

Source: KOSME Business Consultants Capacity Scan, 2013

Those business consultants stating that their business consultancy services are subsidized or co-financed by public or donor support schemes (i.e. “yes, in some cases” or “yes, mostly”) usually refer to the following institutions / donors and schemes (ranked by the number of responses):

- **USAID**, specific USAID programmes such as **YEP** (Young Entrepreneur Program) and **NOA** (New Opportunities for Agriculture)
- **EBRD** (European Bank for Reconstruction and Development): EBRD funds, **BAS** (Business Advisory Services) Programme
- **European Union Office in Kosovo**, e.g. EU-projects
- **Ministry of Trade and Industry**, including the previous **Voucher Scheme**
- **SPARK** and **BSCK** (Business Support Centre Kosovo)
- **World Bank**
- **UNDP** (United Nations Development Programme)
- Other development corporations or programmes such as **GIZ** (German Society for International Co-operation), **DFID** (Department for International Development)



## 2 Market conditions for business consultancy in Kosovo

According to a feasibility study by KOSME (2013)<sup>8</sup>, most analysts and economists agree that there is a **significant need for consulting services on the side of SMEs**. However, the present reality in Kosovo is still that SMEs either do not know where to obtain relevant and affordable business consultancy or are reluctant to contract services. Furthermore, experience suggests that SMEs do not particularly trust the consultancy market or do not see the extra benefit of making use of the currently available consultancy supply. In the case of female enterprises, women find it difficult to find and access adequate and affordable business consultancy which responds to their particular reality and needs. Consequently, the business consultancy market is still in its infancy in Kosovo. Effective (fully paid for) demand for business consultancy is low.

**Table 9 Main factors hampering the demand for business consultancy services in the private business sector in Kosovo**

Main hampering factors	% of consultants considering this to be a hampering factor for the demand for business consultancy services
Enterprises / organisations are not aware of their needs	78.6
No financial means of the enterprises / organisations to make use of consulting services	70.2
Enterprises / organisations do not believe that consultants can help them	66.7
High number of informal businesses in Kosovo	51.2
Mistrust to third-party consultancy	39.3
Lack of transparency in the consultancy market	28.6
Enterprises / organisations demand business consultancies which are not offered by the consultants	3.6
Total (N=84)	

Note: As multiple answers were possible, the shares do not add up to 100%.

Source: KOSME Business Consultants Capacity Scan, 2013

<sup>8</sup> KOSME (2013): SME Voucher Counselling Scheme. Feasibility Study. Towards a working market for business services providers for Kosovo SMEs. Study in the frame of the KOSME project



Therefore, the business consultants were asked what **main factors** they see **hampering the demand for business consultancy services in Kosovo**. These are considered to be lack of awareness, lack of finance and refusal to use the services of business consultants, confirming what is said above. As shown in table 9, according to the majority of the business consultants (78.6 %), the enterprises / organisations would not be aware of their needs. Also, 70.2 % of the consultants claim that enterprises / organisations would not dispose of financial means to make use of consulting services. Furthermore, around two thirds of the consultants (66.7 %) state that enterprises / organisations would not believe that consultants can help them.

As regards the consulting market as a whole, some of the consultants said that *the importance of consulting as such is not being recognised* – for instance, it was mentioned that the Government of Kosovo (GoK) does not provide support measures for businesses in terms of giving them the consultancy they need.

Further statements refer to *the lack of relevant or practical skills of the business consultants*: Some consultants are of the opinion that there are many unprofessional and inexperienced consultants in the market, often having only theoretical or shallow knowledge on specific topics. This would negatively affect the whole market of consultancy services.

Also, some statements point to the *role of the public institutions and donors*, which seems to be double-edged: One consultant stated that continuous support from the donors is always necessary for developing a consultancy market. Another consultant mentioned that consulting services are often only accepted by the client when they come as a result of co-operations with international organisations or state institutions in the frame of specific projects. On the other hand, some of the consultants were of the opinion that the *free provision of consulting services by donors* in the past years led to the perception among enterprises that consulting services should be free of costs – this is considered to be a hampering factor as well.

In the frame of the survey the business consultants had to assess what **criteria are the most important ones for Kosovar businesses when it comes to the selection of a consultant / consulting company**. For the vast majority of the business consultants, *the reputation of the consultant* is the crucial factor for selection: As shown in table 10, references and recommendations of the particular consultant is an important criterion for 73.8 % of the consultants, as well as the previous positive experience with the consultant (72.6 %). A further criterion refers to the *practical attitude of the consultant*, which is important for around two thirds (67.9 %) of the consultants. It is followed by *specific industry knowledge* which is rated by 54.8 % of the consultants to be relevant for the selection process.





**Table 10 Most important criteria for businesses when selecting a consultant / consulting company**

<b>Criteria</b>	<b>% of business consultants stating that this is an important criterion</b>
References, recommendations of the consultant	73.8
Previous positive experience with the consultant	72.6
Practical attitude of the consultant	67.9
Specific industry knowledge	54.8
Personal relationship with the consultant	53.6
Personal network of the consultant within the business community	51.2
Broad range of consulting services (“one-stop-shop”)	40.5
Low fees / prices	35.7
International experience / international network	34.5
Know-how about legal issues / regulations	31.0
Total (N=84)	100

Note: As multiple answers were possible, the shares do not add up to 100%.

Source: KOSME Business Consultants Capacity Scan, 2013

Less important criteria for the selection of a particular consultant / consulting company refer to low fees / prices (35.7 %), international experience / international network of the consultant (34.5 %) as well as know-how about legal issues / regulations (31.0 %).

The surveyed business consultants also had to **assess the supply and the competition in the business consultancy market** in Kosovo. The respondents had to rate several factors which are influencing business consulting services in one way or another. According to table 11, the *price-competition* is seen to be rather medium: Around one half of the consultants (51.2 %) are of this opinion, while around one quarter (27.4 %) even think that price competition is high. A similar, but not so pronounced response was given when assessing the *competition by international consultants*: 39.3 % of the business consultants see a medium competition while further 25 % even believe there is a high competition.

The *quality of education / training* is assessed to be medium by the majority of the consultants (59.5 %), with further 16.7 % stating it is low. Also, when it comes to *the quality of consultancy services* provided in Kosovo, half of the business consultants think that it is of medium quality, with further 26.2 % even saying that the quality is low.

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The majority of the surveyed business consultants are of the opinion that both the *competition in the consultancy market* (70.2 %) and the *number of consultants* (67.9 %) is increasing – it is clear that these factors are strongly interrelated with each other.

**Table 11 Assessment of the supply and the competition in the business consultancy market in Kosovo**

	<b>% of business consultants</b>				
	<b>High</b>	<b>Medium</b>	<b>Low</b>	<b>No answer</b>	<b>Total (N=84)</b>
Price-competition	27.4	51.2	6.0	15.5	100
Competition by international consultants	25.0	39.3	22.6	13.1	100
Quality of consultancy services	16.7	50.0	26.2	7.1	100
Quality of education / training measures for consultants	11.9	59.5	16.7	11.9	100
	<b>Increasing</b>	<b>No change</b>	<b>Decreasing</b>	<b>No answer</b>	<b>Total (N=84)</b>
Competition in the consultancy market	70.2	19.0	2.4	8.3	100
Number of consultants	67.9	15.5	2.4	14.3	100

Note: Due to rounding errors, the shares do not add up exactly to 100%.

Source: KOSME Business Consultants Capacity Scan, 2013



### 3 Skills and capacities needed by business consultants

According to KOSME (2013)<sup>9</sup>, a significant share of consultants is reported to have an educational background that is not sufficiently practical for engaging in meaningful consultancy work. Nevertheless, the majority of the surveyed business consultants (75.0 %) have completed their **education** in the field of business & management on university level (see table 12). 14.3 % stated to have completed their education in the field of information/communication technology and another 11.9 % declared to have completed a tertiary engineering education (university level). Only very few consultants completed other kinds of education like high schools in the field of business & management or engineering (secondary level).

**Table 12 Educational attainment of the surveyed business consultants**

Kind of education	% of business consultants
Business & management, tertiary level (university)	75.0
Information/communication technology	14.3
Engineering, tertiary level (university)	11.9
Business & management, secondary level (high school)	2.4
Engineering, secondary level (high school)	1.2
Law, political science	1.2
Other <sup>1</sup>	6.0
Total (N=84)	

Note: As multiple answers were possible, the shares do not add up to 100%.

<sup>1</sup> Other: e.g. PhD candidate without mentioning the respective university study course

Source: KOSME Business Consultants Capacity Scan, 2013

<sup>9</sup> KOSME (2013): SME Voucher Counselling Scheme. Feasibility Study. Towards a working market for business services providers for Kosovo SMEs. Study in the frame of the KOSME project



About two thirds of the business consultants (67.9 %) stated to have **completed a special training or certification** in the area of consultancy. 21.4 % answered to have not attended such a training or to have not got any certification in this field (see table 13), and further 10.7 % even did not answer this question. This would seem to suggest that in total one third of the consultants do not have any specific training on consultancy.

**Table 13 Completion of a special training or certification in the area of consultancy**

	<b>% of business consultants</b>
Yes	67.9
No	21.4
No answer	10.7
Total (N=84)	100

Source: KOSME Business Consultants Capacity Scan, 2013

The majority of the business consultants who indicated that they completed a training or certification specified what they did - in order of the number of responses, these include:

- Numerous kinds of different trainings, e.g. in the field of business management, business start-up, business planning, project management, marketing, HR management, taxes, quality management. For most of these trainings it cannot be said if they were completed with a specific certification or if they were awarded state recognition (30 responses)
- Accreditation as a consultant / trainer by the Kosovar MTI (Ministry of Trade and Industry) (11)
- Certified trainers / training for trainers (12 responses)
- Certified Management Consultant (CMC) (8 responses)
- Certified lead auditor / audit training (7 responses)
- Certified accountant / accounting training (4 responses)



**Table 14 Interest of business consultants in skills development measures**

<b>Skills development measures</b>	<b>% of business consultants interested in this measure</b>
International business / export / developing linkages to export markets	57.1
Establishing and working with Public-Private-Partnerships (PPP)	45.2
Establishing / developing business contacts and co-operations with markets in Kosovo	36.9
Project management	34.5
Techniques / concepts in relation to consulting services (e.g. market systems analysis, competitiveness analysis, stakeholder analysis, SWOT)	33.3
Innovation management	29.8
Management skills / soft skills	28.6
Marketing and public relations	27.4
Quality management	27.4
Specific industry knowledge	26.2
Financing	25.0
Knowledge of public support measures for companies	25.0
Development of value chains	22.6
Gender mainstreaming, equal opportunities measures, diversity management	19.0
Inclusive growth, making markets work for the poor	16.7
Information and communication technology (ICT) skills	15.5
HR management	14.3
Technical norms / standards	10.7
Development of supply chains	10.7
Total (N=84)	

Note: As multiple answers were possible, the shares do not add up to 100%.

Source: KOSME Business Consultants Capacity Scan, 2013



The business consultants were also asked what kind of **skills development measures they would be interested in** to improve their position in the consultancy market (see table 14).

In general, they did not so much refer to specialised consulting knowledge in order to serve the basic needs of the Kosovar enterprises (e.g. development of supply chains, technical norms/standards or HR management), but more to *establishing and developing links and structures* in order to improve their position in the consultancy market: In particular, the business consultants mentioned they would be interested in developing skills in the field of “international business / export / developing linkages to export markets” (57.1 %), “establishing and working with Public-Private-Partnerships (PPP)” (45.2 %) and “establishing / developing business contacts and co-operations with markets in Kosovo” (36.9 %).

Subsequently, *issues directly related to actual consulting activities* are mentioned: around one third of the consultants are interested in further training in the field of project management (34.5 %) and specific techniques / concepts in relation to consulting services (e.g. market systems analysis, competitiveness analysis, stakeholder analysis, SWOT) (33.3 %).

Furthermore, the business consultants were asked if they had any **specific experiences in providing business consultancy services that aim to benefit specific groups**, such as women, ethnic minorities, informal businesses, entrepreneurs/farmers/processors in (remote) rural areas etc.

According to table 15, nearly two thirds (61.9 %) of the surveyed business consultants agreed to have such experiences. 28.6 % of the business consultants provide *services especially for women*, in particular services related to starting-up a business, making a business plan, the financial management of a business but also marketing, public relations and networking.

20.2 % of the business consultants offer services *especially for minorities* (e.g. Serbs, Turks, Gorani, Ashkali). Apart from services related to starting-up and running a business (business plans, marketing, financial management), the consultants also provide services in specific economic sectors such as agriculture, food production, wine, tourism as well as materials and construction.

Still 14.3 % of the consultants are experienced in providing *services especially for entrepreneurs / farmers / processors in (remote) rural areas*. This is particularly the case in the field of starting-up a business, farm management, business planning and financial management. The consultants also supply their services in the field of agriculture, wine, tourism, handicraft products and traditional foods.

Furthermore, some few consultants stated to provide their services in establishing a farmers' association and for team work in agriculture co-operatives. A considerable share of respondents (27.4 %) does not provide any services for groups as mentioned above.



**Table 15 Specific experiences of business consultants in providing business consultancy services that aim to benefit specific groups<sup>1</sup>**

<b>Provision of business consultancy services for specific groups</b>	<b>% of business consultants</b>
Yes	61.9
Women <sup>2</sup>	28.6
Ethnic minorities <sup>2</sup>	20.2
Entrepreneurs/farmers/processors in (remote) rural areas <sup>2</sup>	14.3
Informal businesses <sup>2</sup>	1.2
No	27.4
No answer	10.7
Total (N=84)	100

<sup>1</sup> Specific groups: women, ethnic minorities, informal businesses, entrepreneurs/farmers/processors in (remote) rural areas etc.

<sup>2</sup> As multiple answers were possible, the shares of these specific groups do not add up to 61.9% (Yes-Answers).

Source: KOSME Business Consultants Capacity Scan, 2013



## 4 Special interest groups

One of the aims of the KOSME project is to support the Business Consultants Council (BCC) in Kosovo in assuming its role as professional business association. The BCC is a currently re-emerging professional association of business consultants in Kosovo. It is the only such association in Kosovo. The KOSME project will support BCC's re-organizing process as well as subsequent operations including qualification, training of consultants and CMC certification. Furthermore, close collaboration and partnership between BCC and MTI/SME Agency is foreseen in the implementation of a new SME voucher counselling scheme – a mechanism that allows a start-up or an enterprise to receive subsidized business development services, typically by counselling or training.

Therefore, in the frame of the capacity scan, it was surveyed to what extent business consultants are presently **organised in special interest groups**, if they have **ever heard of the Business Consultants Council (BCC)** and if they generally would be **interested to become a member of the BCC**.

Table 16 Relation of surveyed business consultants to special interest groups

	% of business consultants			Total (N=84)
	Yes	No	No answer	
Being a member of an association or a formal network of business consultants	35.7	53.6	10.7	100
Having heard of Business Consultants Council (BCC)	32.1	57.1	10.7	100
Being interested to become a member of the Business Consultants Council (BCC)	88.1	1.2	10.7	100

Source: KOSME Business Consultants Capacity Scan, 2013





As shown in table 16, about one half of the consultants (53.6 %) are presently not a **member of an association or a formal network of business consultants**, whereas 35.7 % stated to be organised in such a kind of special interest group in the field of business consulting. In particular, the following were mentioned (in order of their number of responses):

- *Business Advisory Services (BAS) Programme* – in the frame of this programme, a consultancy network has been created
- *Business Consultants Council (BCC)*
- Several business associations such as *Alliance of Kosovo Businesses (AKB)*, *Kosovo Chamber of Commerce (KCC)*, *K-TEX Association (Kosovo)*
- *SPARK / BSCK*
- *International Council of Management Consulting Institutes (ICMCI)*
- *Kosovo Association of Young Entrepreneurs*

Around one third of the business consultants (32.1 %) said that they already **have heard of the Business Consultants Council (BCC)**. When asked *in which context they have heard of BCC*, some of the respondents stated that either they are a member of BCC or they are working on its re-establishment. Again, other business consultants only know that BCC exists or that there are currently efforts for its reactivation. Some of the business consultants stated that there is a lack of willingness among consultants to organise themselves in a network. Another business consultant is of the opinion that the BCC lacks transparency, a vision up to now and clear objectives in contributing to the organisation and development of the consultancy market in Kosovo. However, 57.1 % of the respondents are *not aware of the existence of BCC*.

74 (88.1 %) of the surveyed business consultants are **interested in becoming a member of BCC**. They were asked what **services to/for members a business consultants association should offer** (see table 17). The vast majority of the respondents (82.4 %) think that a business consultants association should primarily focus on networking / communication among the consultants community. Also, such an association should offer certifications (e.g. CMC, CME) and standards (e.g. ISO), as mentioned by 79.7 % of the respondents. About three quarters (75.7 %) are of the opinion that advocacy / lobbying / outward representation of interests as well as information on regulations and consultancy standards are services that should be offered by a business consultants association. The respondents are also positive about international networking activities (70.3 %), the provision of training/qualification measures (68.9 %) as well as the organisation of events / conferences (63.5 %). Also, mediation between members and clients (62.2 %) is seen to be an important service a Kosovar business consultants association should offer.



**Table 17 Services a business consultants association should offer to/for members**

<b>Services</b>	<b>% of the business consultants stating this service should be offered</b>
Networking/communication among the consultants community	82.4
Certifications (e.g. CMC, CME) and standards (e.g. ISO)	79.7
Advocacy / lobbying / outward representation of interests	75.7
Information on regulations and consultancy standards	75.7
International networking	70.3
Training/qualification measures	68.9
Organisation of events / conferences	63.5
Mediation between members and clients	62.2
Information on calls for tender	56.8
Marketing the services of the members	48.6
<b>Total (N=74<sup>1</sup>)</b>	

Note: As multiple answers were possible, the shares do not add up to 100%.

<sup>1</sup> The total number of respondents (N=74) includes only those who stated that they would be interested to become a member of the Business Consultants Council “BCC” – only they have been asked what services a business consultants association should offer.

Source: KOSME Business Consultants Capacity Scan, 2013

Apart from the services listed in table 17, some of the business consultants also mentioned that the provision of an *electronic platform for matching and commercial purposes* both within Kosovar regions and outside Kosovo could be a service that a business consultants association could offer. One business consultant also stated that the BCC should protect the rights of the consultants and business partners and should not serve only a limited number of firms as it was practiced in the past. The leadership of the BCC should not be in a conflict of interests with the needs of its members.



With a view to the provision of the services mentioned above, the business consultants were asked **what annual fee they would be ready to pay for a membership in the BCC.**

**Table 18 Annual fee that the surveyed business consultants are ready to pay for a membership in the Business Consultants Council “BCC”**

Annual fee ready to pay for	% of the business consultants
Up to 50 €	20.2
50 to 99 €	21.4
100 to 149 €	7.1
150 € and more	2.4
No fee	8.3
Do not know <sup>1</sup>	29.8
No answer	10.7
Total (N=84)	100

<sup>1</sup> Do not know: This category also includes answers where it was referred to the point that an annual fee depends on the number/quality of services provided.

Source: KOSME Business Consultants Capacity Scan, 2013

According to table 18, 21.4 % of the business consultants are ready to pay between 50 and 99 € per year, and another 20.2 % can imagine to pay up to 50 €. In total, only 9.5 % are willing to pay an annual fee of 100 € or more. However, 29.8 % do not know what annual fee would be justified – among this group, many respondents stated that the willingness to pay a certain annual fee largely depends on the number/quality of services provided.





## 5 Voucher Counselling Scheme – SME Voucher

As previously mentioned, the KOSME project will support MTI in implementing a new SME voucher counselling scheme, a mechanism that provides small amounts of public subsidy to SMEs so they can benefit from external support in order to develop their management and innovation capabilities. The objective of the KOSME voucher scheme is to support the growth and employment potential of SMEs as key contributors to job creation and poverty reduction. More jobs and higher incomes for women and men can be achieved by more sustainable and more competitive enterprises in Kosovo. Business consultancy can contribute to competitiveness, but in order to have a high and sustainable impact, an effective and inclusive market for business consultancy needs to be established (see KOSME, 2013 for more details).

In general, the majority of the 84 surveyed business consultants (84.5 %) are convinced that a **voucher system could help to increase the demand for business consulting services in a sustainable way**. As depicted in table 19, around one half of the respondents know (25.0 %) or even was part of (28.6 %) the previous business consultancy voucher scheme of the Ministry of Trade and Industry (MTI). About one third of the consultants (35.7 %) does not have any knowledge about the previous business consultancy voucher scheme and therefore did also not participate.

**Table 19 Business consultants: Knowledge/being part of the previous business consultancy voucher scheme of the Ministry of Trade and Industry (MTI)**

Knowledge / being part of the previous MTI voucher scheme	% of business consultants
Yes, I participated in the previous business consultancy voucher scheme	28.6
Yes, I know the previous business consultancy voucher scheme	25.0
I do not know / I did not participate in the previous business consultancy voucher scheme	35.7
No answer	10.7
Total (N=84)	100

Source: KOSME Business Consultants Capacity Scan, 2013

The business consultants knowing or even participating in the previous scheme (i.e. 45 consultants - 53.6 %) were asked **for an assessment of the previous business consultancy Voucher Scheme of the Ministry of Trade and Industry (MTI)** (see table 20).



**Table 20 Assessment of the previous business consultancy voucher scheme of the Ministry of Trade and Industry (MTI) by the surveyed business consultants**

Statements regarding the previous business consultancy voucher scheme	% of business consultants who say this was <sup>1</sup> ...				Total (N=45)
	excellent (5) / good (4)	medium (3)	sufficient (2) / insufficient (1)	No answer	
Targeted the right kind of sector	46.7	20.0	20.0	13.3	100
Offered the kind of consultancy services enterprises sought/needed	44.4	24.4	24.4	6.7	100
Targeted the right size of enterprises	37.8	24.4	22.2	15.6	100
Provided sufficient depth and duration of consultancy	33.3	24.4	33.3	8.9	100
Satisfactory handling of administrative procedures of the voucher scheme	31.1	26.7	26.7	15.6	100
Has resulted in enterprises buying consultancies without subsidies	24.4	17.8	40.0	17.8	100

<sup>1</sup> The respondents had to indicate their assessment on a scale from 5 (excellent) to 1 (insufficient).  
Source: KOSME Business Consultants Capacity Scan, 2013

The 45 business consultants had to assess several statements regarding the previous business consultancy voucher scheme – in particular, they had to indicate their assessment on a scale from 5 (excellent) to 1 (insufficient). According to this, it seems that the previous voucher scheme has *targeted the right kind of sector* on the whole: 46.7 % of the respondents assessed this as excellent or good. There is a similar assessment when it comes to *offering the kind of consultancy services enterprises sought / needed*: 44.4 % of the consultants are of the opinion that this was excellent or good.

Rather positive reactions were also given by the business consultants when indicating if the scheme had *targeted the right size of enterprises* – 37.8 % stated that this was done in an excellent or good way, but further 24.4 % assessed this to be only medium. A similar assessment applies to the statement if the previous voucher scheme *provided sufficient depth and duration of consultancy*: one



third (33.3 %) say this was excellent or good, and further 24.4 % declared this was implemented in a medium way.

There were mixed reactions when the consultants had to assess whether the voucher scheme *provided sufficient depth and duration of consultancy*: One third stated it was excellent or good, while another third said it was only sufficient or even insufficient.

Also, the *handling of administrative procedures of the voucher scheme* seems to be a point which deserves rethinking for future activities: Only one third (31.1 %) state that this was excellent or good, while 26.7 % are of the opinion this was done in a medium way.

A point which is of utmost importance for the Kosovar business consultants has received the worst ratings among all statements – the question if the previous voucher scheme *has resulted in enterprises buying consultancies without subsidies*. Here, it became clear through the survey, that only 24.4 % think this worked out excellent or good. A relatively high share of 40 % states that this was only sufficient or even insufficient.

Further statements of the business consultants regarding the assessment of the previous voucher scheme refer to its *lack of transparency*, especially when it comes to the *selection of the business consultants*. Some mentioned that the business consultants were selected in favour of the preferences of the MTI officials rather than by taking into account the minimum criteria initially requested from the consultants. Also, one business consultant mentioned that the implementation of the previous voucher scheme through a tender procedure - with one consulting company winning the tender - has negatively affected the independent business consultants. Through this procedure, many of them were excluded from participating in the provision of consultancy services in the frame of the voucher scheme.

26 out of the 45 business consultants who know to a certain extent the previous voucher system of the MTI provided **suggestions for the improvement of the business consultancy voucher scheme**. Roughly, the suggestions can be divided into the following topics:

- *Management of voucher scheme*: transparency of the whole scheme, better management of the scheme (e.g. management directly through the consultants or a more professional approach of the MTI in managing the scheme), no outsourcing to one external company (monopole) - engaging all consultants in order to enable quality competition, monitoring and evaluation of the results of consultancy
- *Occupational qualification of consultants*: Consultants should have a modern international education and should reach a specific quality level
- *Business needs*: better support of businesses and increasing their business awareness, convince businesses of the advantage of consultancy, provision of services which really address the needs of enterprises, creation of pool of businesses which have identified their needs and provision of consulting services which match their needs



There are mixed opinions on the selection process of the business consultants in the frame of the voucher scheme: some say that the company itself should choose the consultants, while others say that the company itself should not be able to choose the consultants.

Nevertheless, on the whole, the surveyed business consultants have **expressed a strong interest both for a new SME Voucher Scheme and the Business Consultants Council**: 82.1 % are interested in participating in the SME Voucher Scheme, planned to be introduced in 2013.

## Summary

### Business consultancy services provided in Kosovo

The majority of the surveyed business consultants are working in their profession for more than five years, many of them as a freelancer or self-employed. Nearly two thirds are located in Prishtina / Priština, which confirms the supremacy of the Kosovar capital city. In particular, the consultants are providing services related to overall business management or specific fields such as training of the company staff, marketing and sales / public relations and the establishment and development of business contacts and co-operations with markets in Kosovo. The typical clients are domestic businesses with 1 to 49 employees and NGOs, but a considerable share of consultants also provide services to international organisations. The overall average number of clients within a year is around 22. Around one half of the surveyed business consultants have clients in the sector production of food, beverages and tobacco products. Other sectors accounting for a significant number of clients are education and qualification, hotels and restaurants as well as information and communication. The average number of working days per business consultancy assignment is 10 days and the average daily fee rate applied for business consulting is around € 120 Euros. In Kosovo, business consultancy services are subsidized / co-financed to a considerable extent by public or donor support schemes, e.g. by USAID, EBRD, European Union Office in Kosovo or MTI; only one quarter of the consultants explained to provide business consultancy services that are not subsidized or co-financed

### Market conditions for business consultancy in Kosovo

There is a significant need for consulting services on the side of SMEs, but effective (fully paid for) demand for business consultancy is low. The main factors hampering the demand for business consultancy services in Kosovo are businesses' lack of awareness of their needs, lack of financial means of enterprises to make use of consulting services and a refusal of businesses to use the services of business consultants because they don't believe that consultants can help them. Some consultants stated that the role of public institutions and donors is double-edged in this regard: on the one hand, continuous support from e.g. donors is necessary for developing the consultancy market, on the other hand, free provision of consulting services by donors in the past led to the perception among enterprises that consulting services should be free of cost. When it comes to the selection of a consultant / consulting company, the most important criteria for Kosovar businesses

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refer to the reputation of the consultant, i.e. references and recommendations as well as previous positive experience with the consultant. With respect to the assessment of the supply and the competition in the business consultancy market in Kosovo, the surveyed business consultants see the price-competition and the competition by international consultants to be rather medium than high. The majority of the consultants assess the quality of education / training and the quality of consultancy to be medium, with a considerable share also assessing the latter to be low. The majority of the surveyed business consultants are of the opinion that both the competition in the consultancy market and the number of consultants is increasing.

### **Skills and capacities needed by business consultants**

A significant share of consultants does not have an educational background sufficiently practical for engaging in meaningful consultancy work. Nevertheless, the majority of the surveyed business consultants have completed their education in the field of business & management on university level. But one third of the consultants do not have any specific training on consultancy. Few consultants stated to be certified trainers, certified management consultants (CMC), certified auditors or certified accountants. As regards the interest in skills development measures, not so much was referred to specialist consulting knowledge, but more to establishing links and structures in order to improve the consultants' position in the consultancy market, e.g. international business / export / developing linkages to export markets or establishing and working with Public-Private-Partnerships. Overall, a considerable share of the respondents have experiences in the provision of business consultancy services that aim to benefit specific groups, i.e. women, ethnic minorities, entrepreneurs / farmers / processors in (remote) rural areas and informal businesses.

### **Special interest groups**

About one half of the surveyed consultants are presently not a member of an association or a formal network of business consultants. Those who are, mainly refer to the BAS Programme of EBRD, the Business Consultants Council (BCC) or several other business associations. About one third of the business consultants said that they already have heard of the BCC. A majority of the respondents are interested in becoming a member of the BCC. In terms of services to/for members a business consultants association should offer, the consultants referred to networking / communication among the consultants community, offering certifications (e.g. CMC, CME) and standards (e.g. ISO), advocacy, lobbying and outward representation of interests as well as information on regulations and consultancy standards. Many respondents would be ready to pay an annual membership fee for BCC of up to € 99, only a small share is willing to pay € 100 and more.







## Voucher Counselling Scheme – SME Voucher

The majority of the surveyed business consultants is convinced that a voucher system could help to increase the demand for business consulting services in a sustainable way. One half of the respondents knows or was even participating in the previous business consultancy Voucher Scheme of the MTI. According to these, it seems that the previous voucher scheme has targeted the right kind of sector and has offered the kind of consultancy services enterprises sought/needed. However, a considerable share of consultants was not perfectly satisfied with the handling of administrative procedures of the voucher scheme. Further, from the viewpoint of the respondents, the previous voucher scheme seems not have led to enterprises buying consultancies without subsidies. Also, a lack of transparency concerning the selection of the business consultants for the previous voucher scheme was mentioned. Suggestions for improvement of the business consultancy voucher scheme include a better management of the voucher scheme, better occupational qualifications of the consultants and to work out and address the business needs of enterprises in a better way. In any case, the surveyed business consultants have expressed a strong interest both for a new SME Voucher Scheme and the BCC.

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