

# ICT & BPO SYSTEM STRATEGY

Western Balkans  
Project Brief (2024–2026)

## Positioning the Western Balkans as a Competitive Nearshoring Hub

The Information and Communications Technology (ICT) and Business Process Outsourcing (BPO) sector is one of the fastest-growing engines of inclusive economic development in the Western Balkans (WB6). With over 220,000 employees regionally and strong potential for youth and women employment, the sector offers scalable, digital, non-manual jobs aligned with EU markets. However, three systemic constraints limit its full potential:

1. Fragmented regional coordination
2. Weak international branding and investment promotion
3. Ineffective labor market intermediation

RECONOMY addresses these constraints through a regional systems approach, strengthening sector institutions, building a unified outsourcing brand, and improving job-matching mechanisms — ensuring sustainable, market-driven growth.

### Countries Covered

Albania | Bosnia and Herzegovina | Kosovo  
Montenegro | North Macedonia | Serbia



### Target Group

- ▶ Youth (15–34)
- ▶ Women
- ▶ Disadvantaged populations

## Strengthening Regional Coordination and Sector Representation

### Systemic Challenge

The Western Balkans operates as six small, fragmented markets with limited cross-border cooperation. Weak sector representation, low trust, and limited structured coordination reduced competitiveness against CEE and Asian outsourcing destinations.

### RECONOMY Response

Establish and strengthen national and regional Association of Business Service Leaders (ABSLs) to build a sustainable regional coordination platform.

### Key Achievements (2024–2025)

#### New National Representation Established

- ▶ 3 new ABSLs created in Serbia, Kosovo, and North Macedonia
- ▶ Formal partnerships with ABSL Bosnia and Herzegovina and Albania
- ▶ 20+ new member companies mobilized across chapters
- ▶ Major international investor Transcom joined the network

#### First Regional Industry Conference (Oct 2025, Sarajevo)

- ▶ 205 participants (private & public sector)
- ▶ 60+ companies represented
- ▶ Generated CHF 53,787 in direct revenues for ABSLs
- ▶ CHF 21,408 additional private sector spending
- ▶ CHF 64,000+ in in-kind contributions from associations

#### Regional Institutionalization

- ▶ Establishment of ABSL Western Balkans (regional umbrella body)
- ▶ Five national associations formally engaged
- ▶ Weekly structured coordination mechanisms established
- ▶ Joint advocacy and marketing alignment underway

#### Strategic Sector Tools

- ▶ First-ever Western Balkans BPO Regional Report (finalization phase)
- ▶ Impact measurement system developed for national & regional ABSLs
- ▶ Business plans and digital platforms launched for new associations

### Systemic Change in Motion

The regional ABSL network is now functioning as a coordination and advocacy platform capable of:

- ▶ Aligning regional messaging
- ▶ Sharing investor data and market intelligence
- ▶ Generating self-sustaining revenue streams
- ▶ Mobilizing private sector co-investment

This represents a structural shift from fragmented representation to coordinated regional action.



## Building a Unified Western Balkans Outsourcing Brand

### Systemic Challenge

Despite strong cost, talent, and proximity advantages, the region lacks a unified investment narrative and coordinated promotion, limiting FDI attraction.

### Intervention Components

- ▶ Creation of unified regional outsourcing brand identity
- ▶ Central digital gateway (landing page + promotional assets)
- ▶ Investor roadshows in Germany, Austria, and Sweden
- ▶ Lead generation campaigns targeting EU investors
- ▶ Alignment of IPAs and industry messaging
- ▶ Case study development showcasing regional success stories

### RECONOMY Response

Development of a unified “Western Balkans Outsourcing” brand led by a private market actor (ManpowerGroup SEE) in cooperation with ABSLs and national IPAs.

### Expected Pilot Results

- ✓ 120–180 qualified investor leads
- ✓ At least one FDI secured during pilot phase
- ✓ Long-term sustainability through private-sector leadership

This intervention shifts promotion from fragmented national marketing toward a coordinated regional investment-promotion mechanism aligned with private-sector incentives.



## Strengthening Labor Market Intermediation for ICT/BPO Growth

### Systemic Challenge

While the ICT/BPO sector is expanding rapidly, labor market intermediation mechanisms have not evolved at the same pace.

Public Employment Services (PES), private recruitment companies, and education institutions operate largely in isolation from sector-specific needs. As a result:

- ▶ ICT/BPO companies struggle to efficiently identify qualified talent
- ▶ Recruitment firms lack sector-specific screening tools and outsourcing knowledge
- ▶ PES systems do not adequately reflect dynamic ICT/BPO skill demand
- ▶ Youth and women remain under-informed about career pathways in the sector

This mismatch constrains sector growth and limits its employment-generation potential.



### RECONOMY Response

RECONOMY is shifting from isolated training activities toward strengthening intermediary functions within the labor market system, ensuring that recruitment, matching, and information flows respond to the evolving needs of ICT/BPO companies.

The intervention focuses on three structural improvements:

#### 1. Institutionalized Public-Private Coordination

- ▶ Structured collaboration between ICT/BPO companies (via ABSLs), PES, recruitment firms, and education providers
- ▶ Formal cooperation agreements (MoUs) to anchor coordination beyond project duration
- ▶ Alignment of activities with regional branding and investor-promotion efforts

#### 2. Capacity Building of Recruitment Intermediaries

- ▶ Sector-specific training for private recruitment firms
- ▶ Development of improved candidate profiling and screening methodologies for ICT/BPO roles
- ▶ Integration of digital tools to enhance talent identification and matching

#### 3. Talent Visibility and Inclusion

- ▶ Mapping underrepresented groups in ICT/BPO
- ▶ Sector-focused awareness campaigns targeting youth and women
- ▶ Development of structured matchmaking mechanisms (job fairs, digital platforms, internship pipelines)