



HUP

Hrvatska udruga poslodavaca

ICT sektor

10. srpnja 2019.

Hrvoje Balen, dopredsjednik HUP ICT

ICT sektor (Eurostat)

rICT	Description
ICTTOT	ICT Total
ICTman	ICT manufacturing industries
	261 Manufacture of electronic components and boards
	262 Manufacture of computers and peripheral equipment
	263 Manufacture of communication equipment
	264 Manufacture of consumer electronics
	268 Manufacture of magnetic and optical media
ICTtotser	ICT total services
ICTtrade	ICT trade industries
	4651 Wholesale of computers, computer peripheral equipment and software
	4652 Wholesale of electronic and telecommunications equipment and parts
ICTser	ICT services industries
	5820 Software publishing
	61 Telecommunications
	62 Computer programming, consultancy and related activities
	631 Data processing, hosting and related activities; web portals
	951 Repair of computers and communication equipment

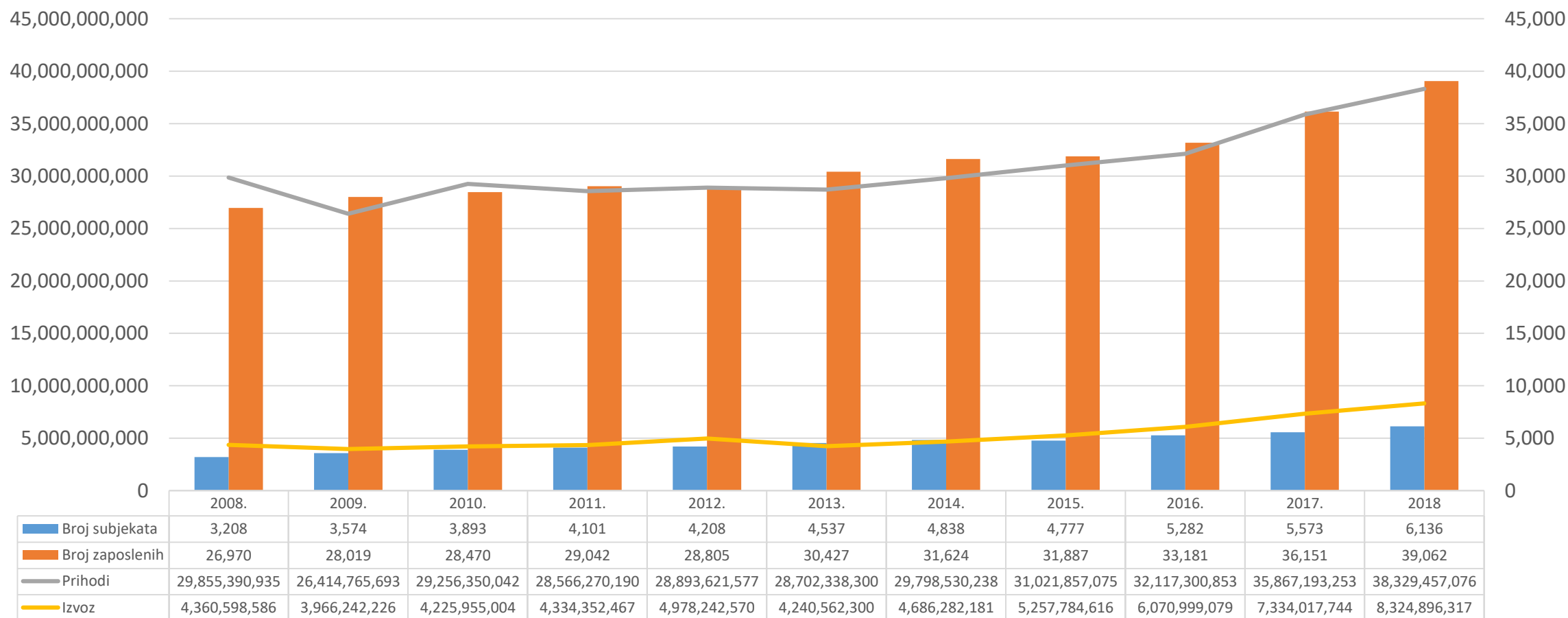


ICT sektor: najveće podskupine

NACE	DESCRIPTION	REVENUE 2018	REVENUE 2017	COMPANIES
61	Telecommunications	13.276.465.056 kn	13.701.981.054 kn	HT, VIPNET, TELE2, OPTIMA, ISKON...
62	Computer programming, consultancy and related activities	11.767.692.762 kn	9.978.027.709 kn	COMBIS, SPAN, KING ICT, COMPING, FIVE, INFINUM, ASSECO, IN2, SEDAM IT...
262	Manufacture of computers and peripheral equipment	4.031.573.731 kn	4.285.500.702 kn	M SAN GRUPA, MICROLINE, LINKS, COMTEL, HANGAR 18, CS, COMPUTECH, KODEKS...
263	Manufacture of communication equipment	1.755.759.744 kn	1.864.497.830 kn	ERICSSON NIKOLA TESLA, ATOS CONVERGENCE CREATORS, RIZ, AC, ELEKTROKEM...
4652	Wholesale of electronic and telecommunications equipment and parts	1.567.289.958 kn	1.182.359.665 kn	HUAWEI TECHNOLOGIES, INGRAM MICRO, MOBIS-ELECTRONIC, SCHRACK TECHNIK, ITERATIO, RITTAL
631	Data processing, hosting and related activities; web portals	1.418.872.495 kn	1.131.961.914 kn	INFOBIP, MERCURY PROCESSING, ERSTE GROUP IT, HP PRODUKCIJA, ALTIORA, VIP-DATA, GOOGLE...
4651	Wholesale of computers, computer peripheral equipment and software	1.261.067.927 kn	1.248.100.560 kn	EUROTRADE, MAKROMIKRO, EZY, HSM, BCC SERVICES...

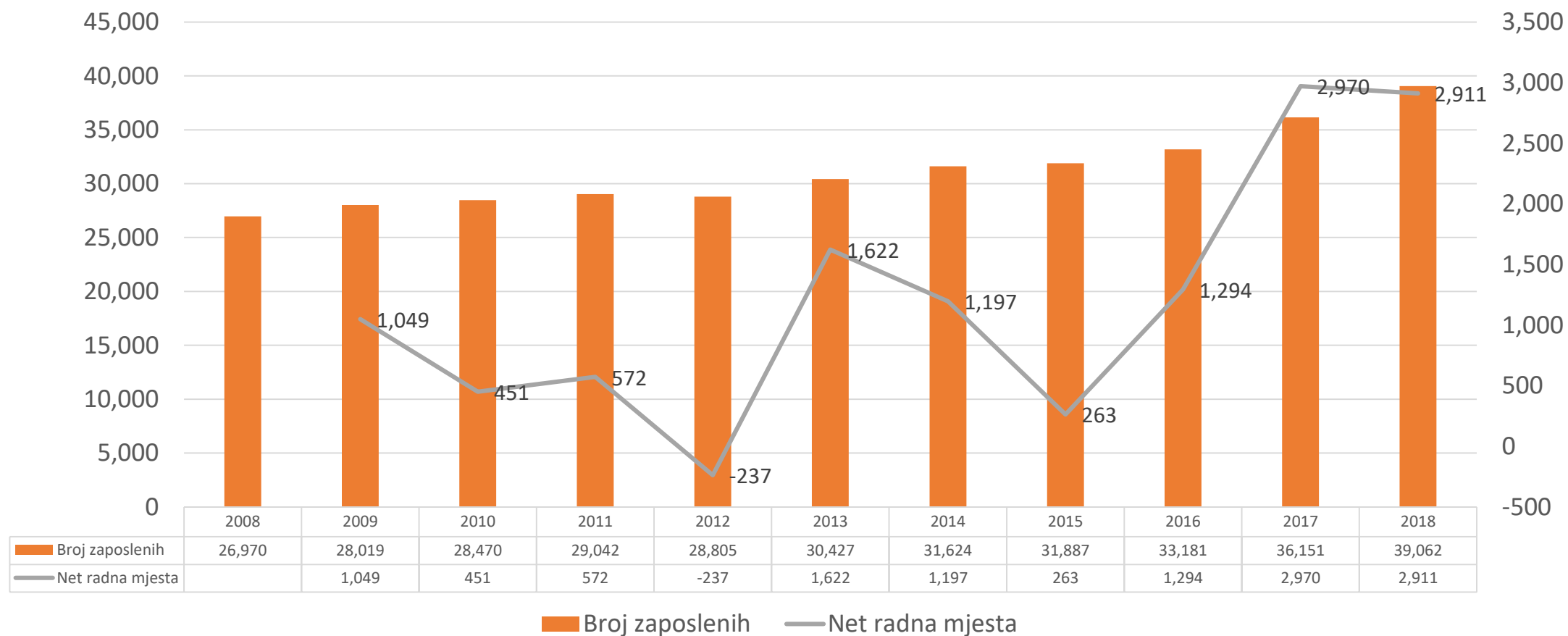


ICT sektor: prihodi



■ Broj subjekata
 ■ Broj zaposlenih
 — Prihodi
 — Izvoz

ICT sektor: zaposleni



ICT sektor: zaposleni

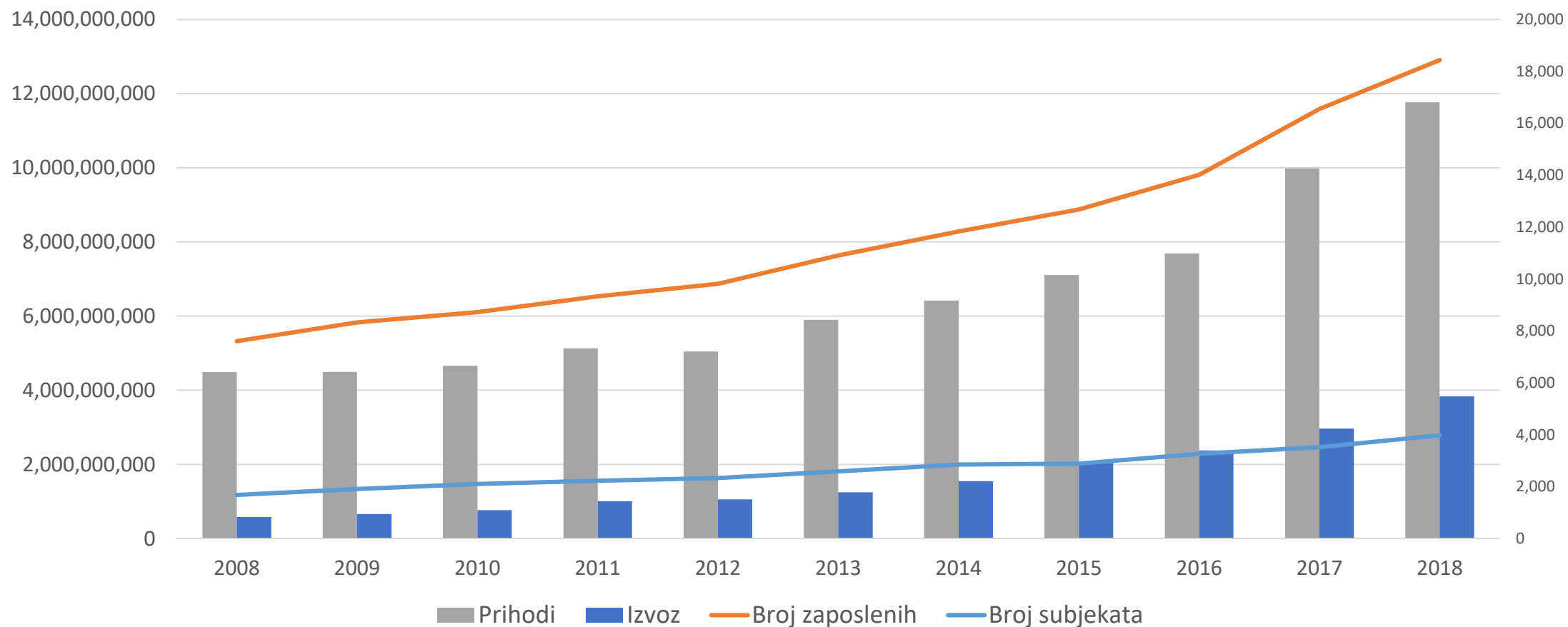
12.092

novih radnih mjesta za

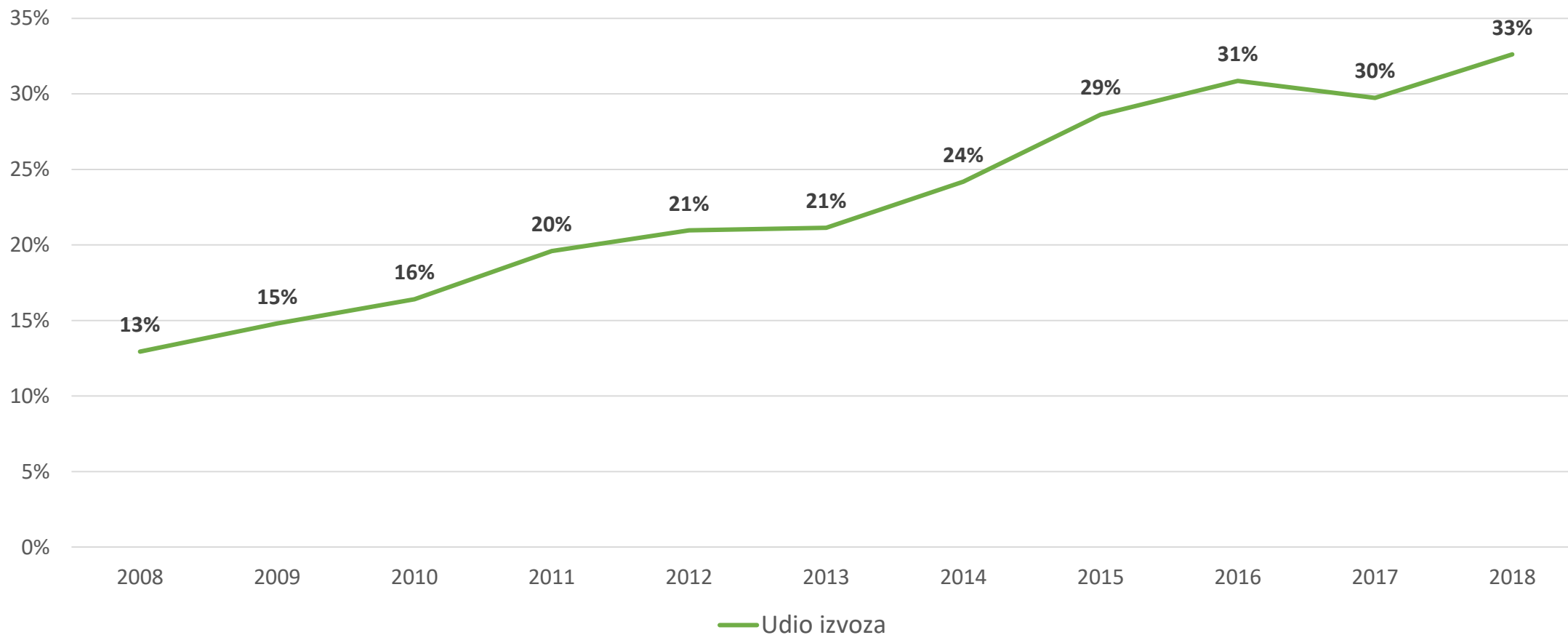
digitalne profesionalce, ekonomiste, pravnike, psihologe, tehničare, financijaše, računovođe, menadžere, istraživače, inženjere, prodavače...



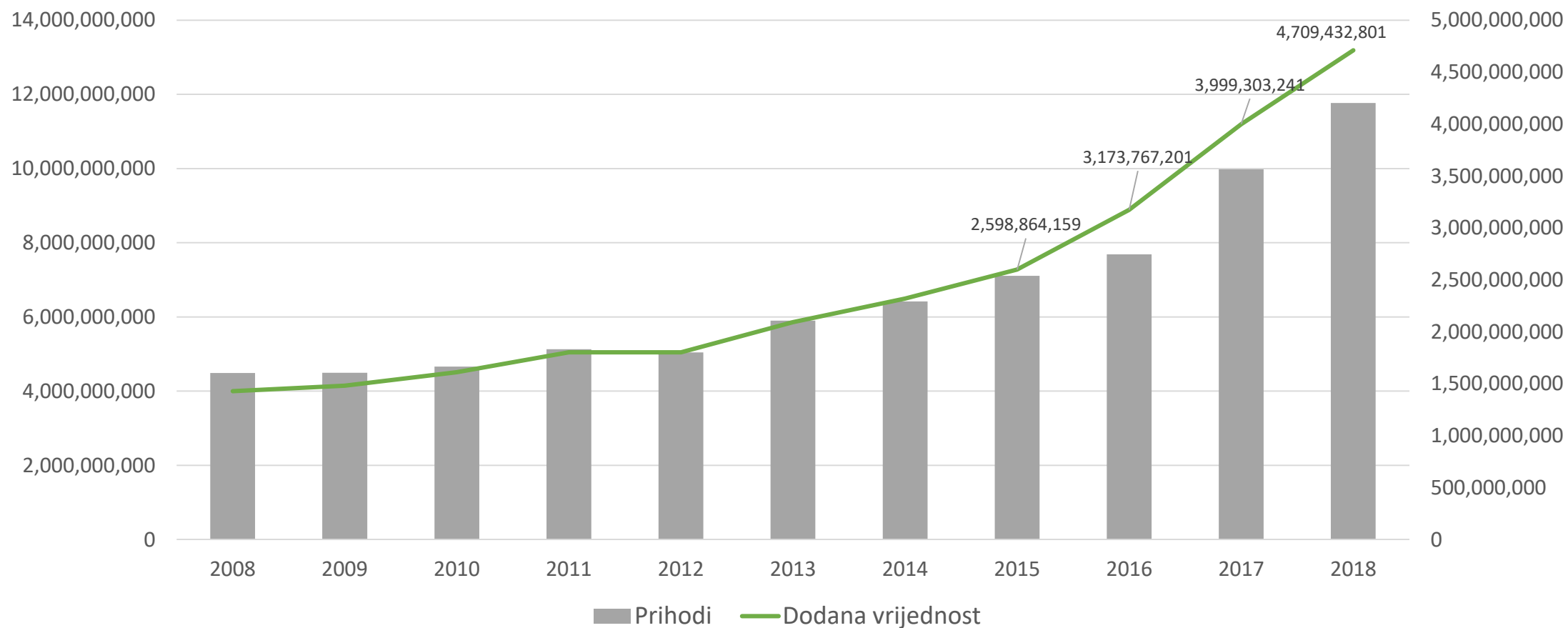
Podsektor računalno programiranje: prihod



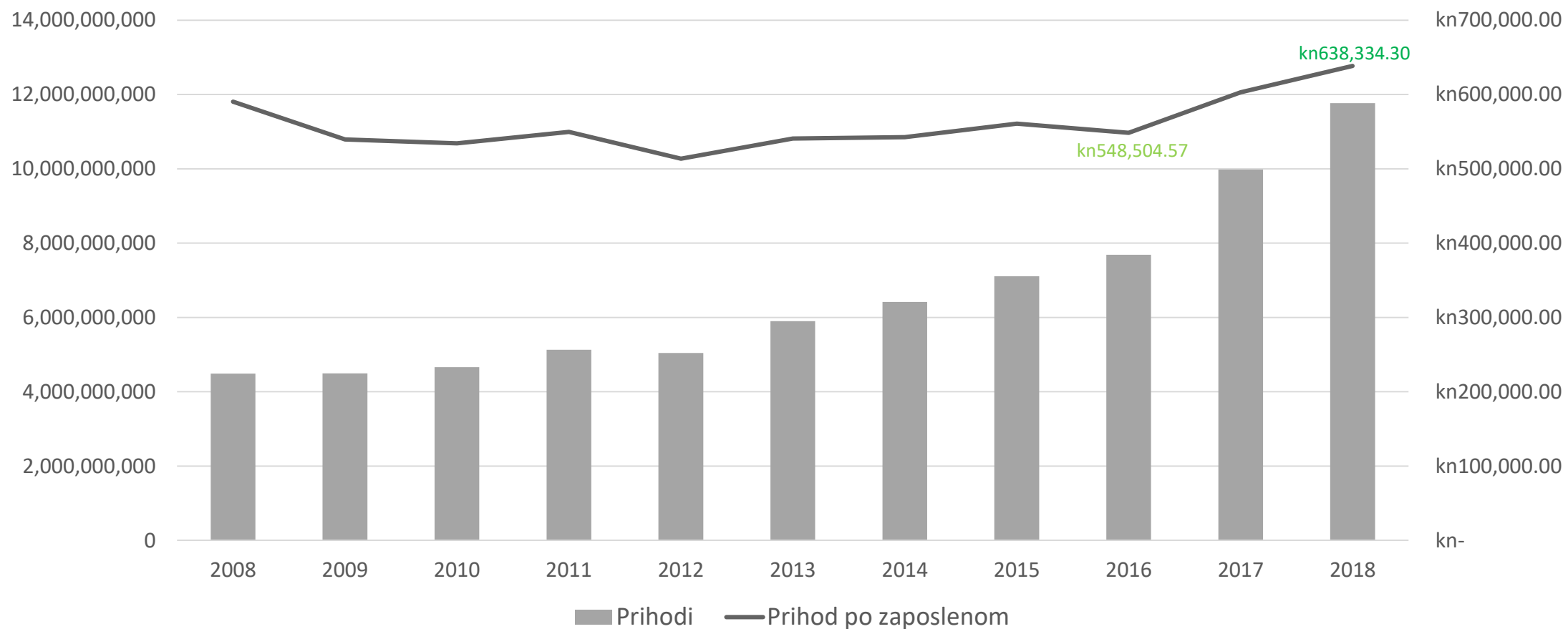
Podsektor računalno programiranje: izvoz



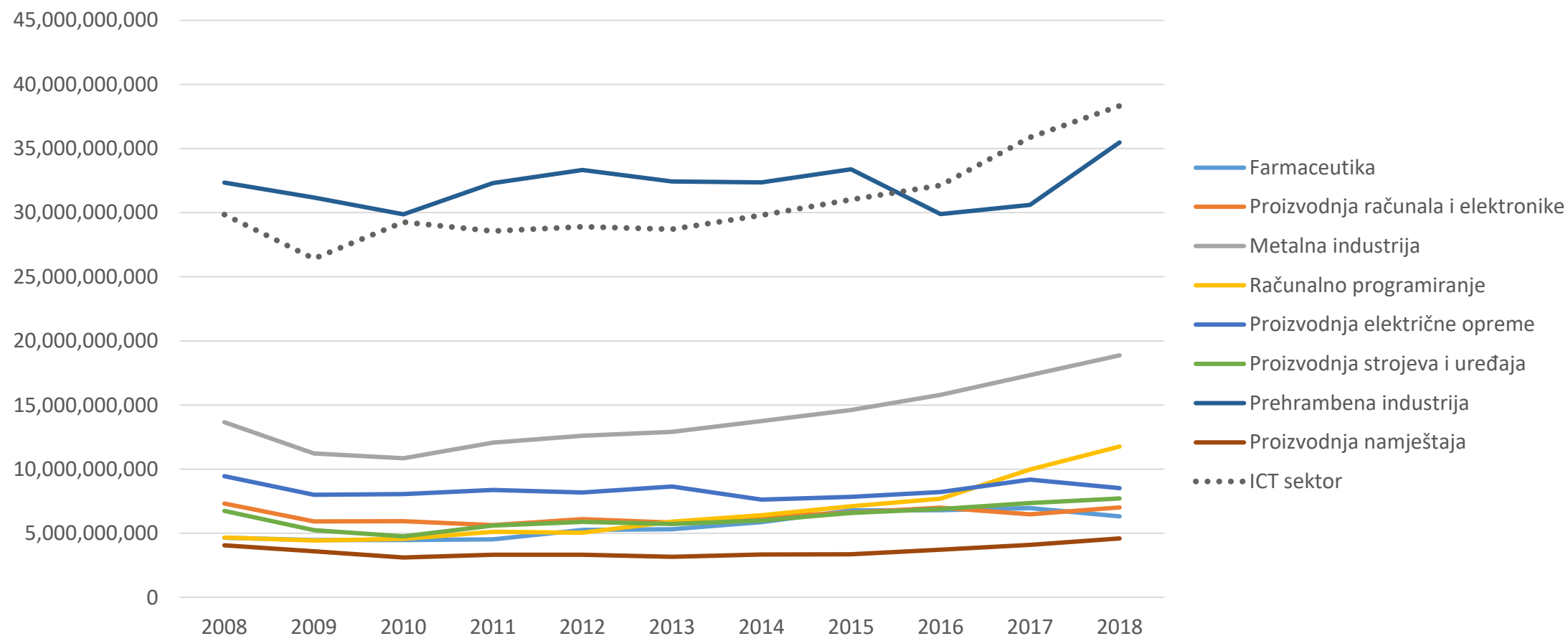
Podsektor računalno programiranje: dodano



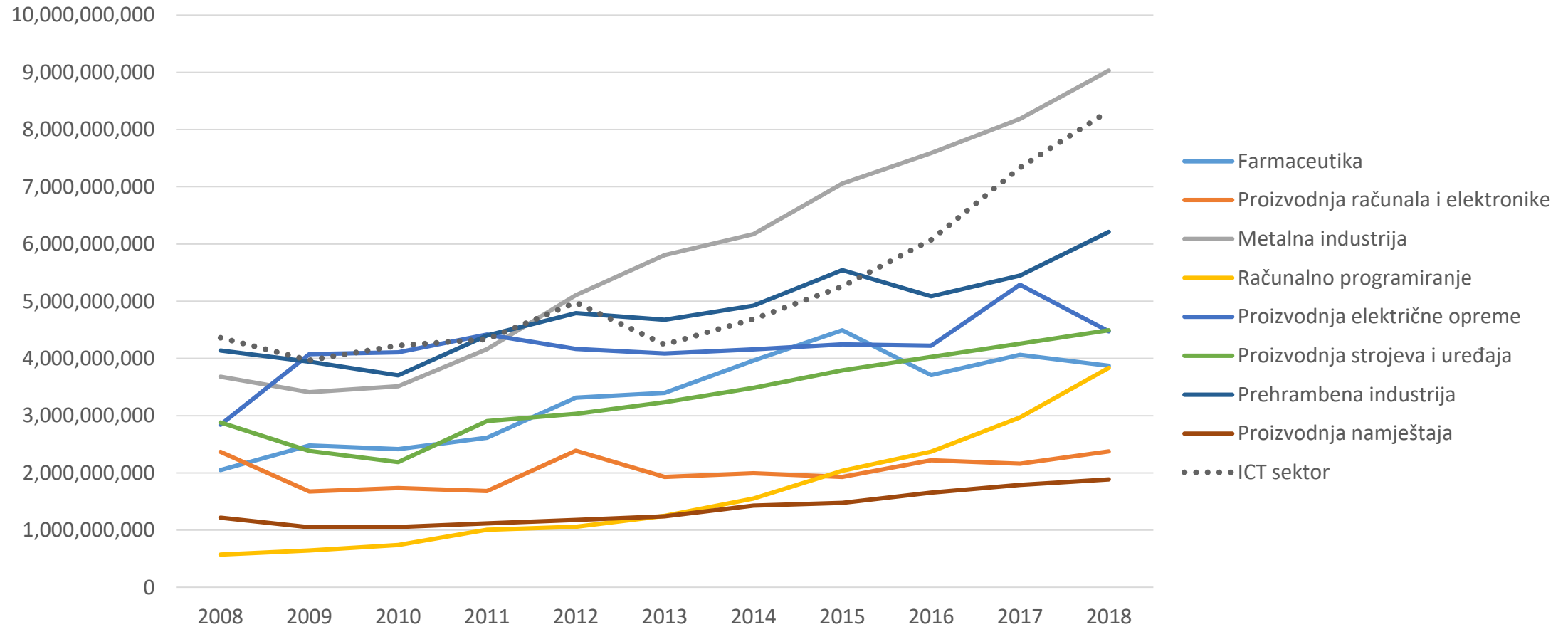
Podsektor računalno programiranje: prihod



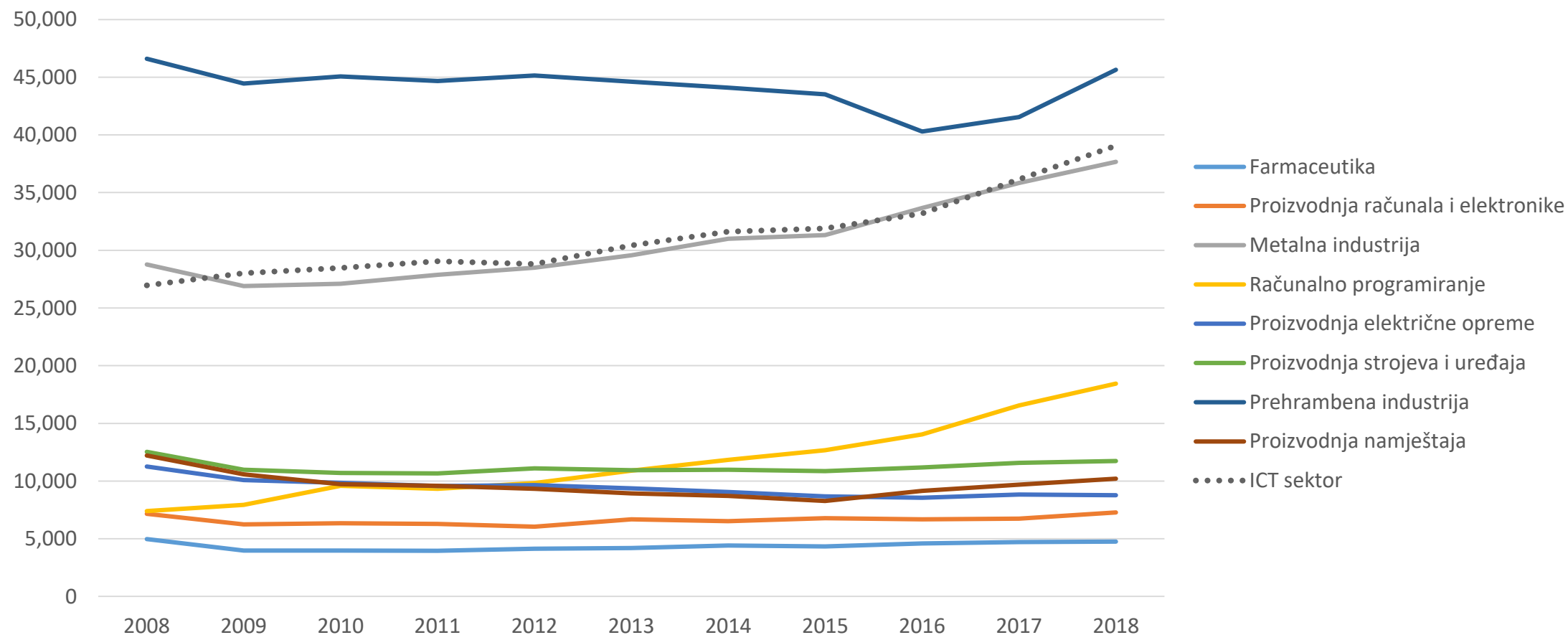
Usporedbe sektora: prihod



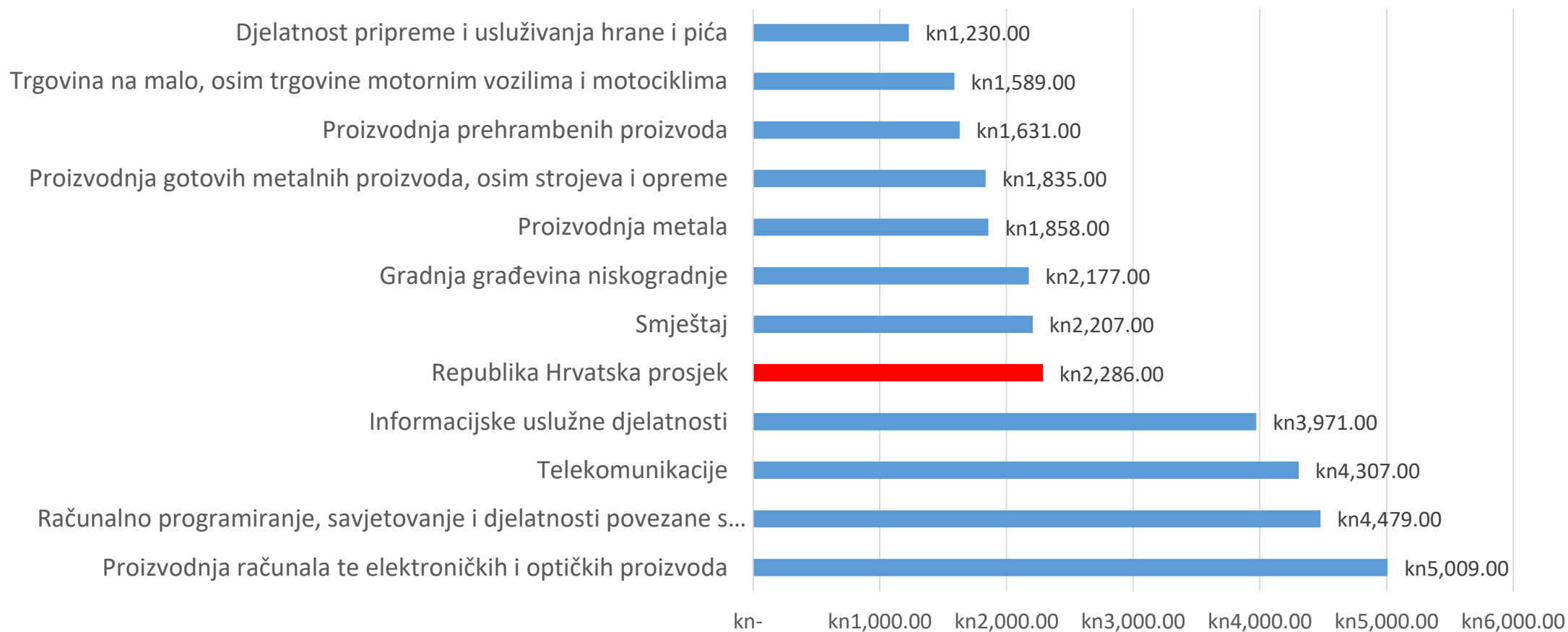
Usporedbe sektora: izvoz



Usporedbe sektora: zaposleni



Porez i doprinos po zaposlenom u sektoru



Stvorena radna mjesta 2010-2019

Oznaka	Djelatnost	Zaposleni	Novozaposleni	Porezi i davanja po zaposleniku
56	Priprema i usluživanje hrane i pića	31.251	14.210	1.237,00 kn
55	Smještaj	41.100	10.332	2.210,00 kn
47	Trgovina na malo, osim trgovine motornim vozilima	106.327	9.810	1.593,00 kn
85	Obrazovanje	114.639	8.873	2.305,00 kn
78	Djelatnosti zapošljavanja	11.195	7.546	1.672,00 kn
49	Kopneni prijevoz i cjevovodni transport	32.515	7.058	1.931,00 kn
62	Računalno programiranje, savjetovanje i povezane djelatnosti	14.262	6.247	4.478,00 kn
88	Djelatnosti socijalne skrbi bez smještaja	8.994	4.374	1.528,00 kn
86	Djelatnosti zdravstvene zaštite	69.370	3.295	2.883,00 kn
38	Skupljanje otpada, djelatnosti obrade i zbrinjavanja otpada	14.242	3.184	1.729,00 kn

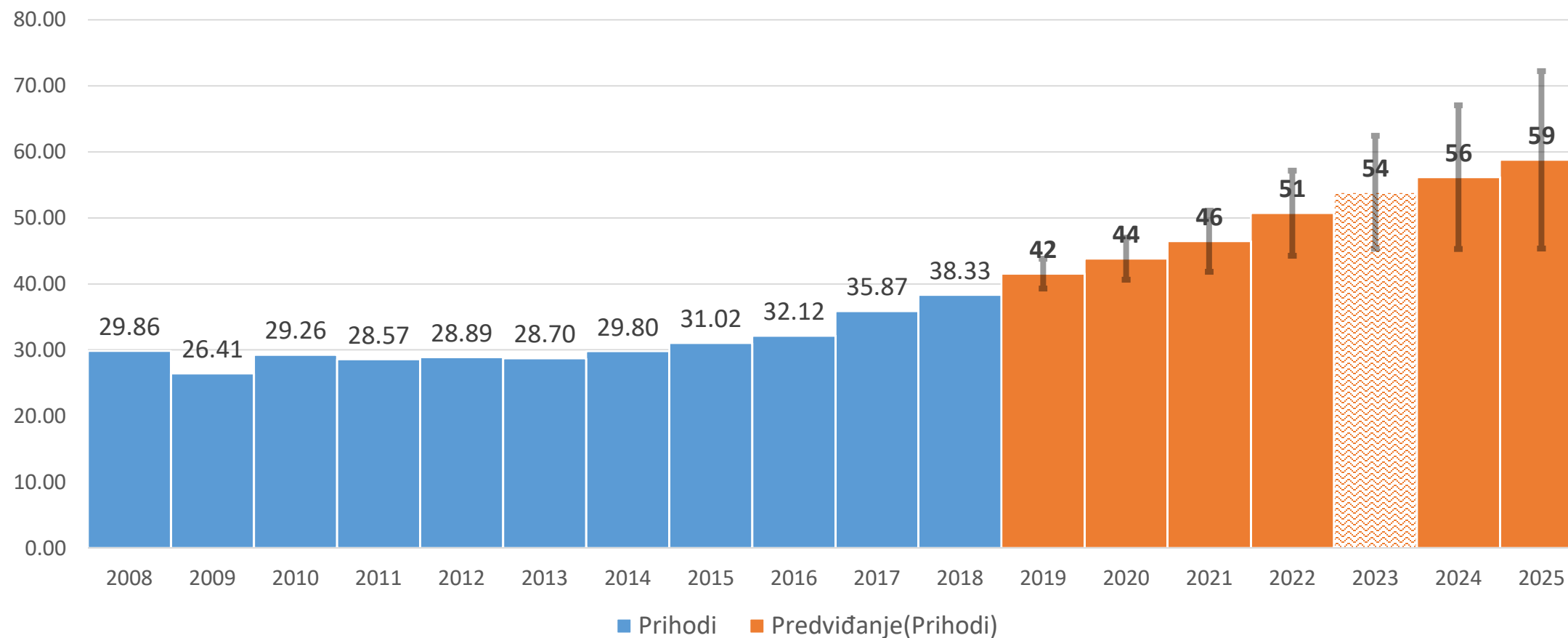
Simulacija rasta ICT sektora iz 2017.

ICT	PRIHOD	BROJ ZAPOSLENIH	IZVOZ (~UDIO U PRIHODU)
2016.	32 milijarde kn	33.181	6 milijardi kn (~19%)
2017.	36 milijardi kn	36.151	7 milijardi kn (~20%)
2025.	45 milijardi kn	55.000	12 milijardi kn (~26%)

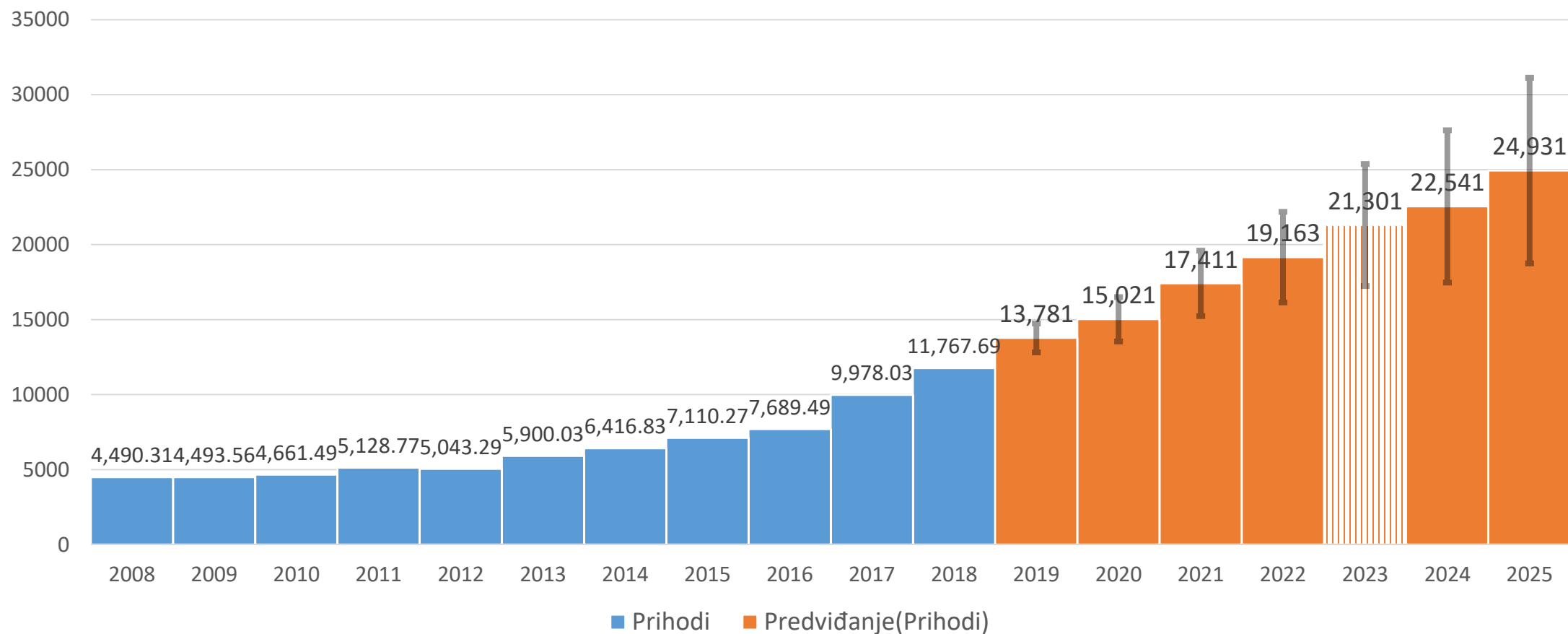
RAČUNALNO PROGRAMIRANJE	PRIHOD	BROJ ZAPOSLENIH	IZVOZ (~UDIO U PRIHODU)
2016.	7,7 milijardi kn	14.019	2,4 milijardi kn (~31%)
2017.	9,9 milijardi kn	16.550	3 milijardi kn (~30%)
2025.	18 milijardi kn	28.000	7,2 milijardi kn (~40%)



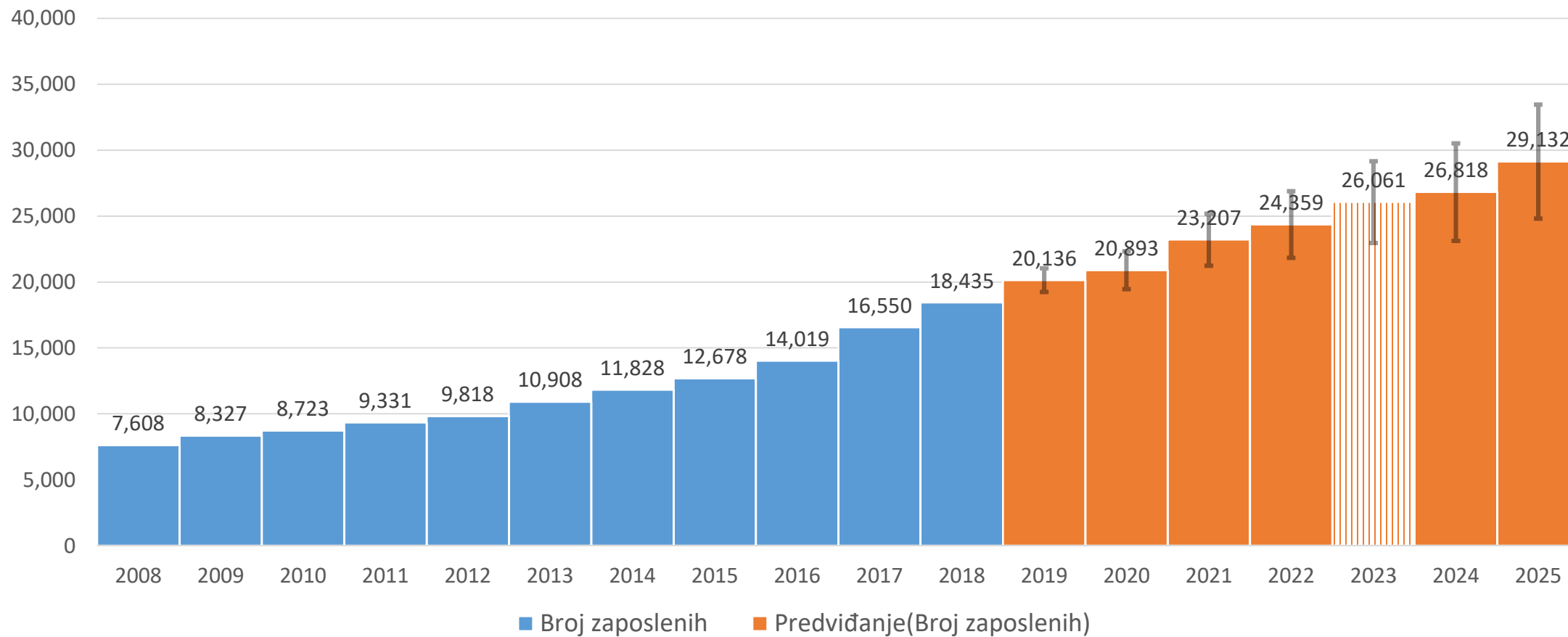
ICT sektor: projekcija prihoda



Računalno programiranje: projekcija prihoda



Računalno programiranje: projekcija radnih mjesta



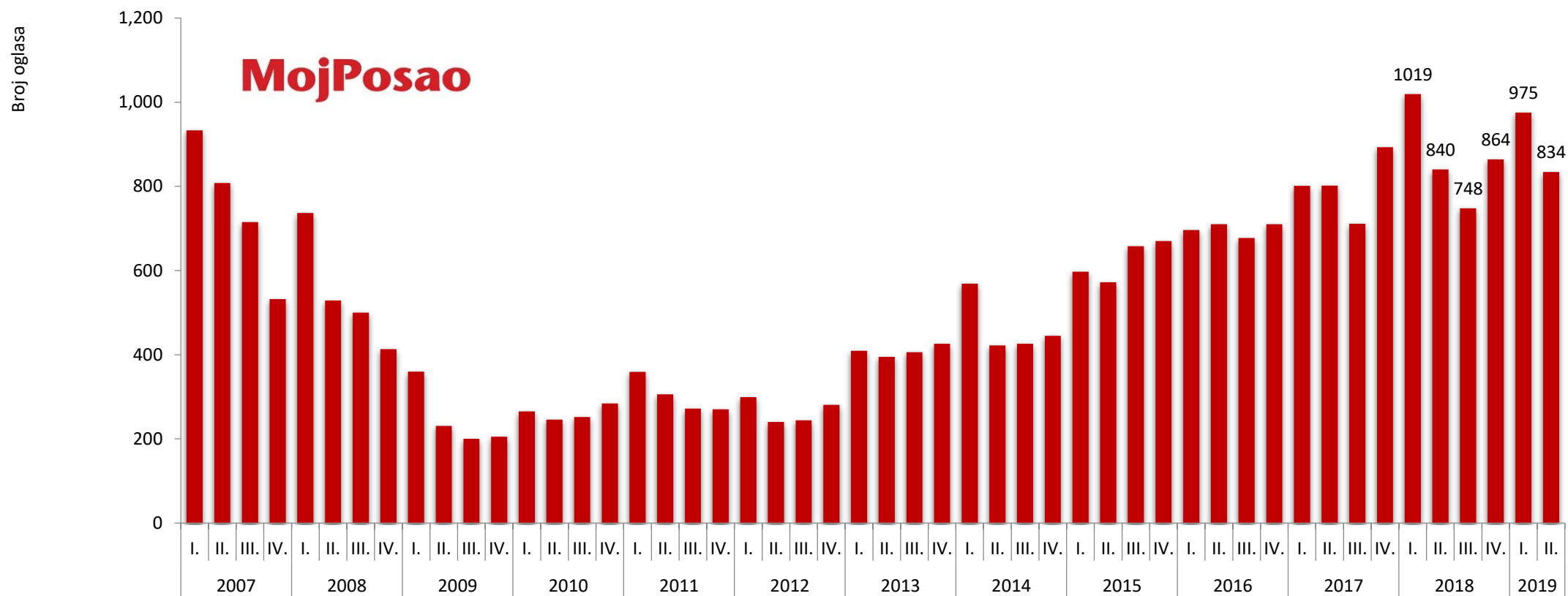
2. Ljudski kapital	Hrvatska		EU
	rang	rezultat	rezultat
DESI 2019.	13.	47,1	48,0
DESI 2018.	13.	46,1	47,6
DESI 2017.	15.	43,2	45,4



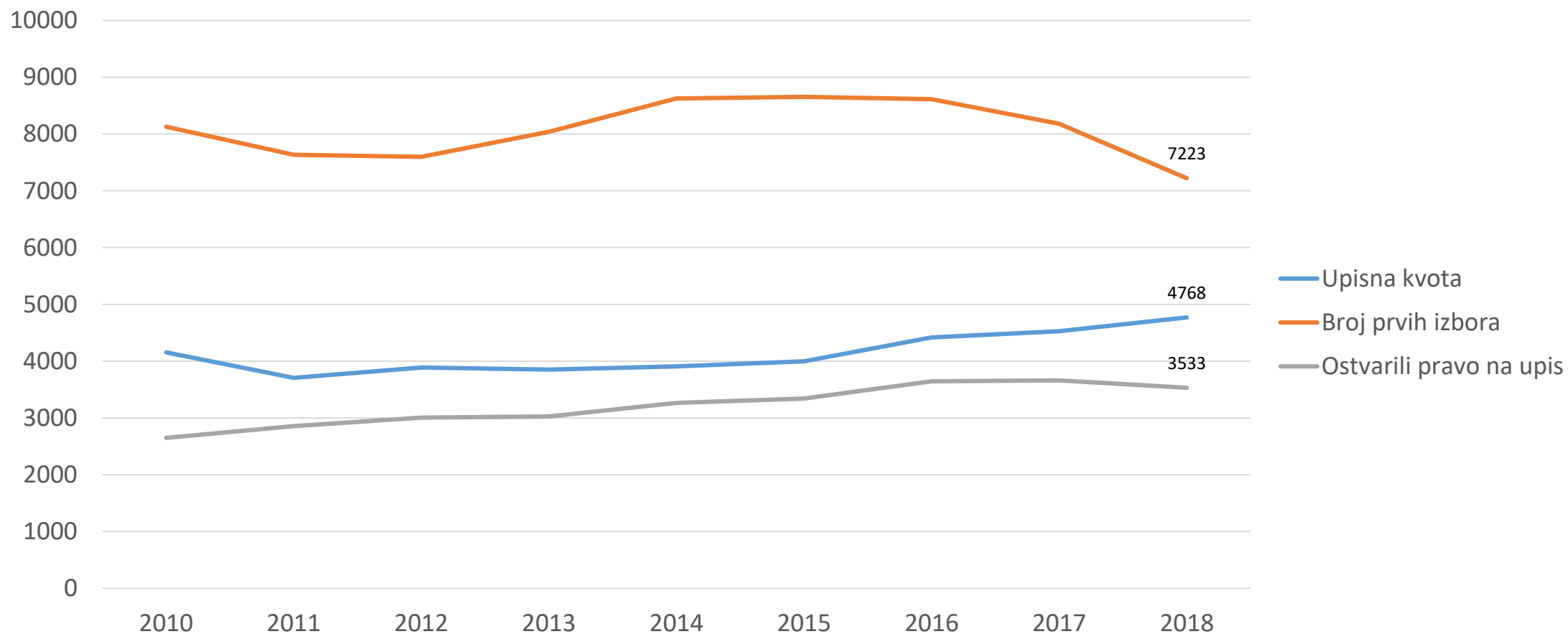
	DESI 2017. vrijednost	Hrvatska		rang	EU DESI 2019. vrijednost
		DESI 2018. vrijednost	DESI 2019. vrijednost		
2.a.1. Najmanje osnovna razina digitalnih vještina % građana	55 % 2016.	nije primjenjivo 2017.	nije primjenjivo 2017.		57 % 2017.
2.a.2. Digitalne vještine na razini višoj od osnovne % građana	33 % 2016.	nije primjenjivo 2017.	nije primjenjivo 2017.		31 % 2017.
2.a.3. Najmanje osnovna razina softverskih vještina % građana	58 % 2016.	nije primjenjivo 2017.	nije primjenjivo 2017.		60 % 2017.
2.b.1. Stručnjaci za IKT % ukupnog broja zaposlenih	2,7 % 2015.	3,3 % 2016.	3,3 % 2017.	17.	3,7 % 2017.
2.b.2. Stručnjakinje u području IKT-a % ukupnog broja zaposlenih žena	1,0 % 2015.	0,9 % 2016.	0,9 % 2017.	21.	1,4 % 2017.
2.b.3. Osobe s diplomom iz područja IKT-a % osoba s diplomom	3,3 % 2014.	4,1 % 2015.	4,7 % 2016.	8.	3,5 % 2015.



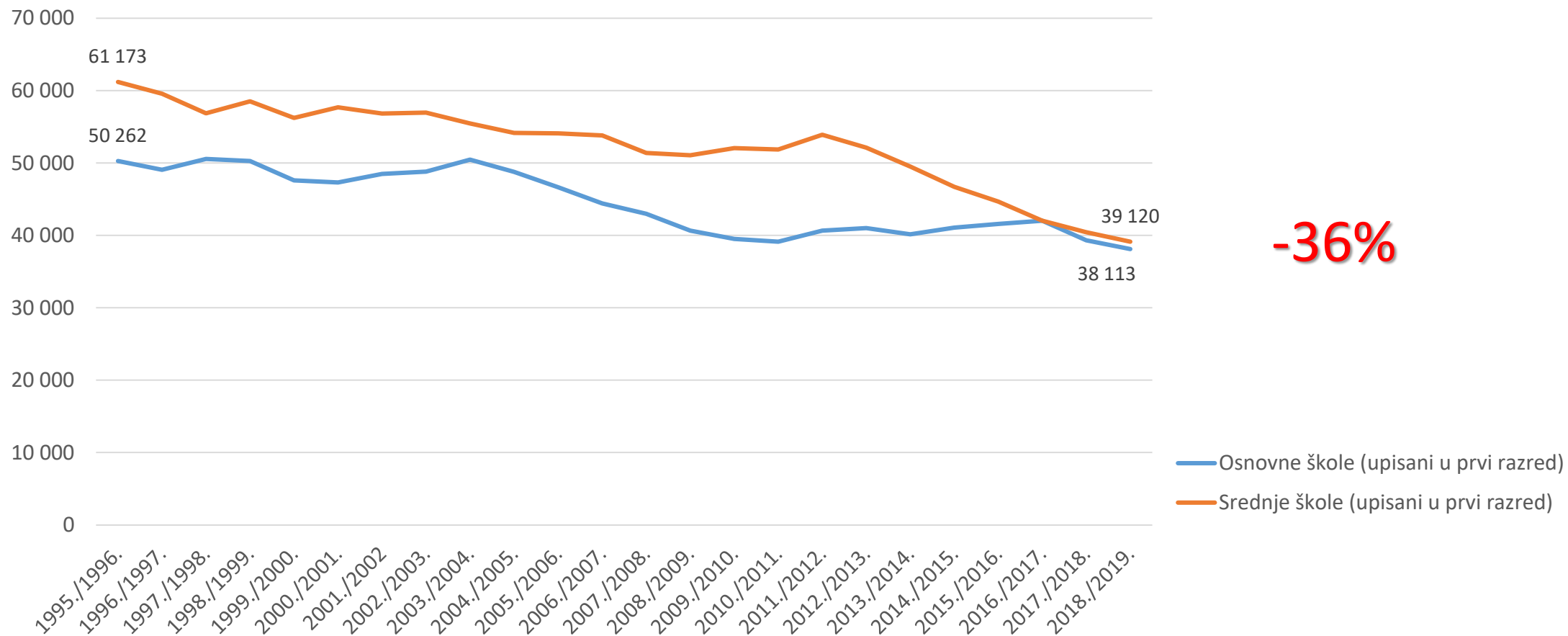
Broj oglasa u kategoriji IT i telekomunikacije



Upisi na preddiplomske IT studije



Upisani u prve razrede



-36%

Realni scenarij

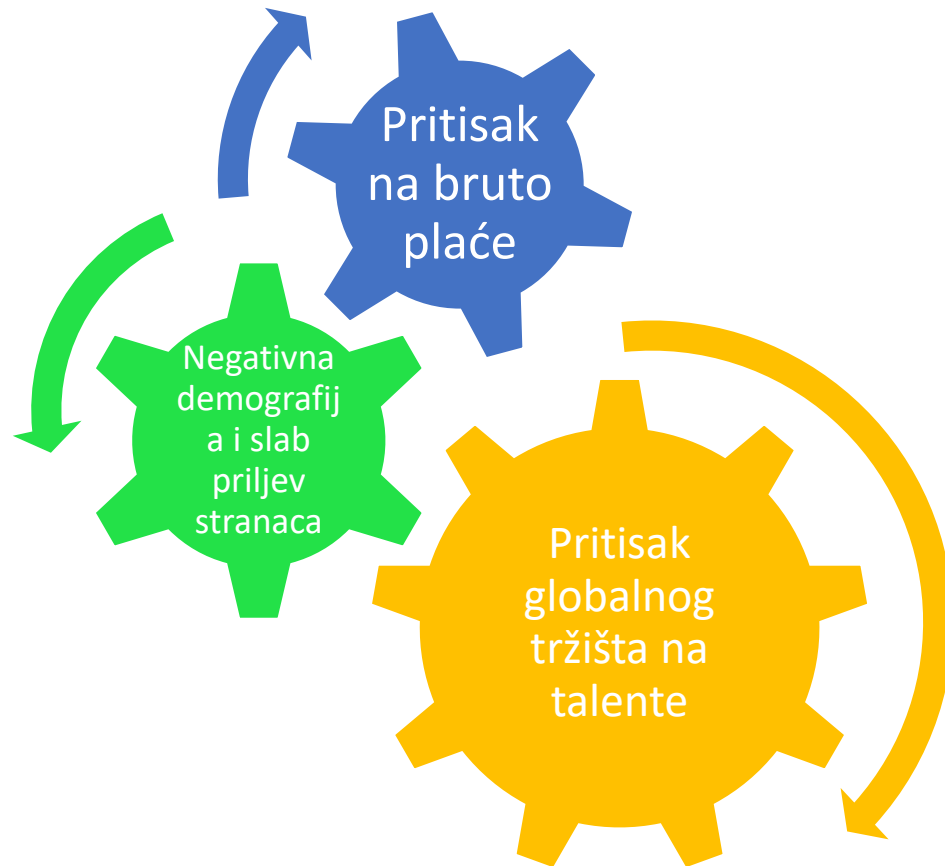
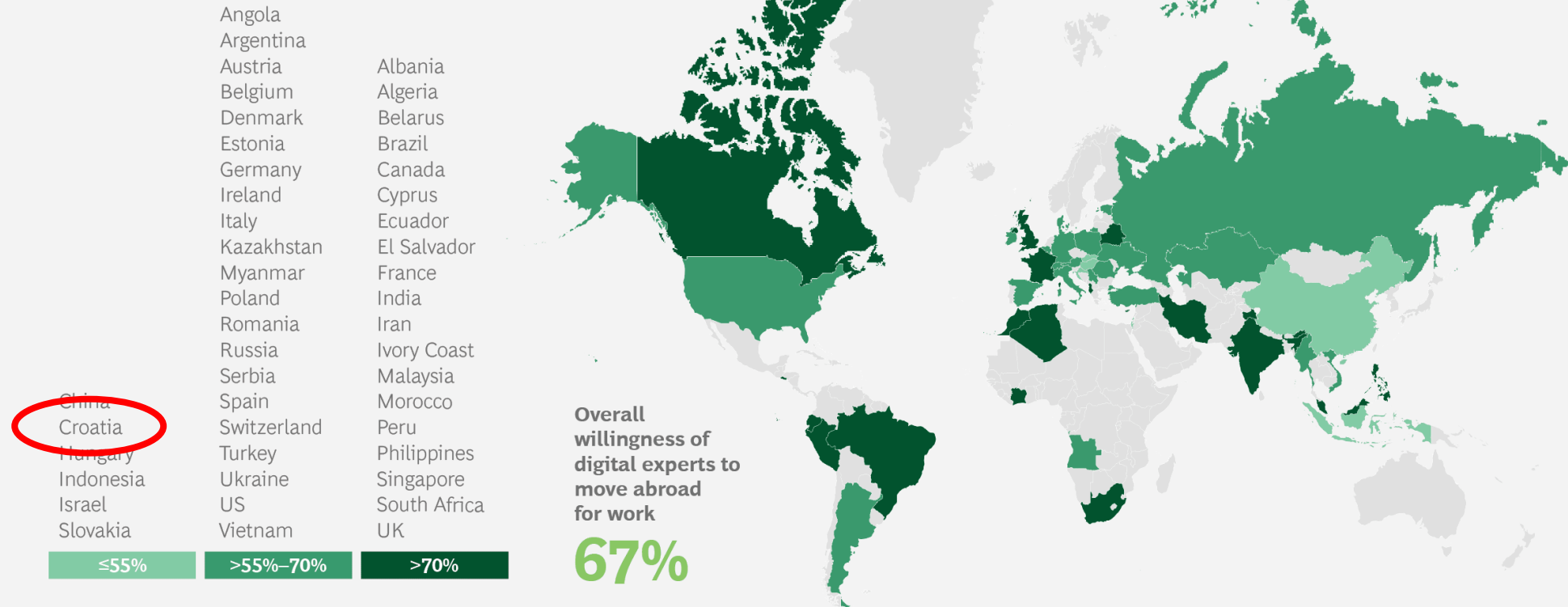


EXHIBIT 2

Willingness of Digital Experts to Move Abroad, by Country

Percentage of respondents who are already working abroad or are willing to move abroad for work



Source: BCG/The Network proprietary web survey and analysis.

Note: Listed are the countries from which there were more than 250 respondents; other countries are shown in gray.

EXHIBIT 6

What Matters Most on the Job

Top ten work preferences among digital experts

Among digital experts



Among nonexperts



Compensation

Work environment and company culture

Job content and development

Employer reputation and image

Sources: BCG/The Network proprietary web survey and analysis.

Note: Survey respondents selected their top preferences from among 26 possible job factors.

Prioriteti

1. Prihvatite prijedlog "5 mjera" da osiguramo nastavak konkurentnosti ICT sektora u sljedećih 10 vrlo izazovnih godina
2. Pokrenite s nama cjeloviti strateški program privlačenja stranaca na tehnološke studije i zadržavanje digitalnih talenata u skladu s „Poveljom o digitalnim radnim mjestima”



Zapitajmo se što ako nitko ne reagira...

