



**HUP**

Hrvatska udruga poslodavaca

# ICT sektor 2017

12. srpnja 2018.

Hrvoje Balen, dopredsjednik HUP ICT  
Dalibor Subotičanec, SPAN research



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Hrvatska udruga poslodavaca

# ICT sektor (Eurostat)

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

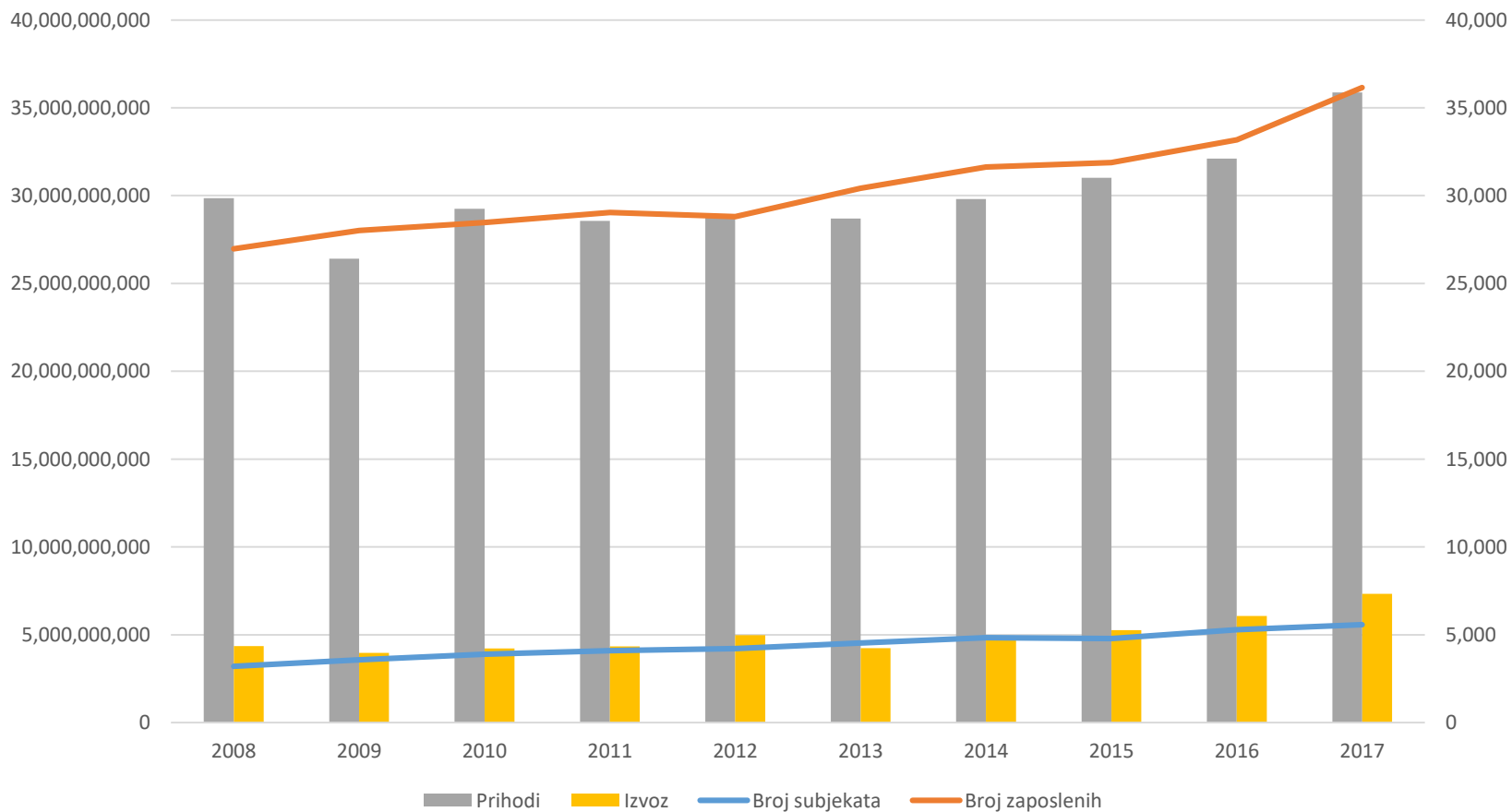


# ICT sektor – najveće skupine

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

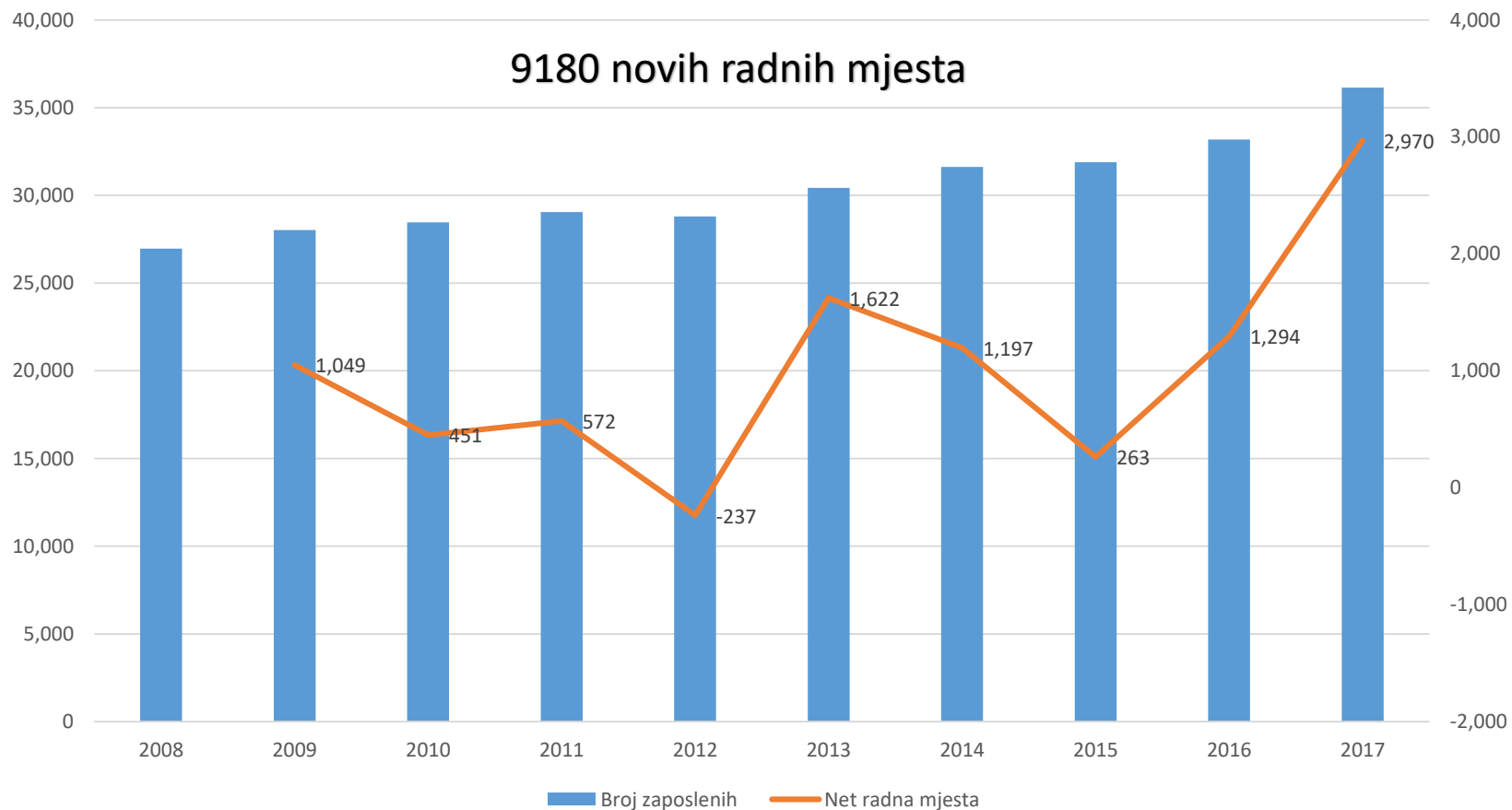


# ICT sektor ukupno





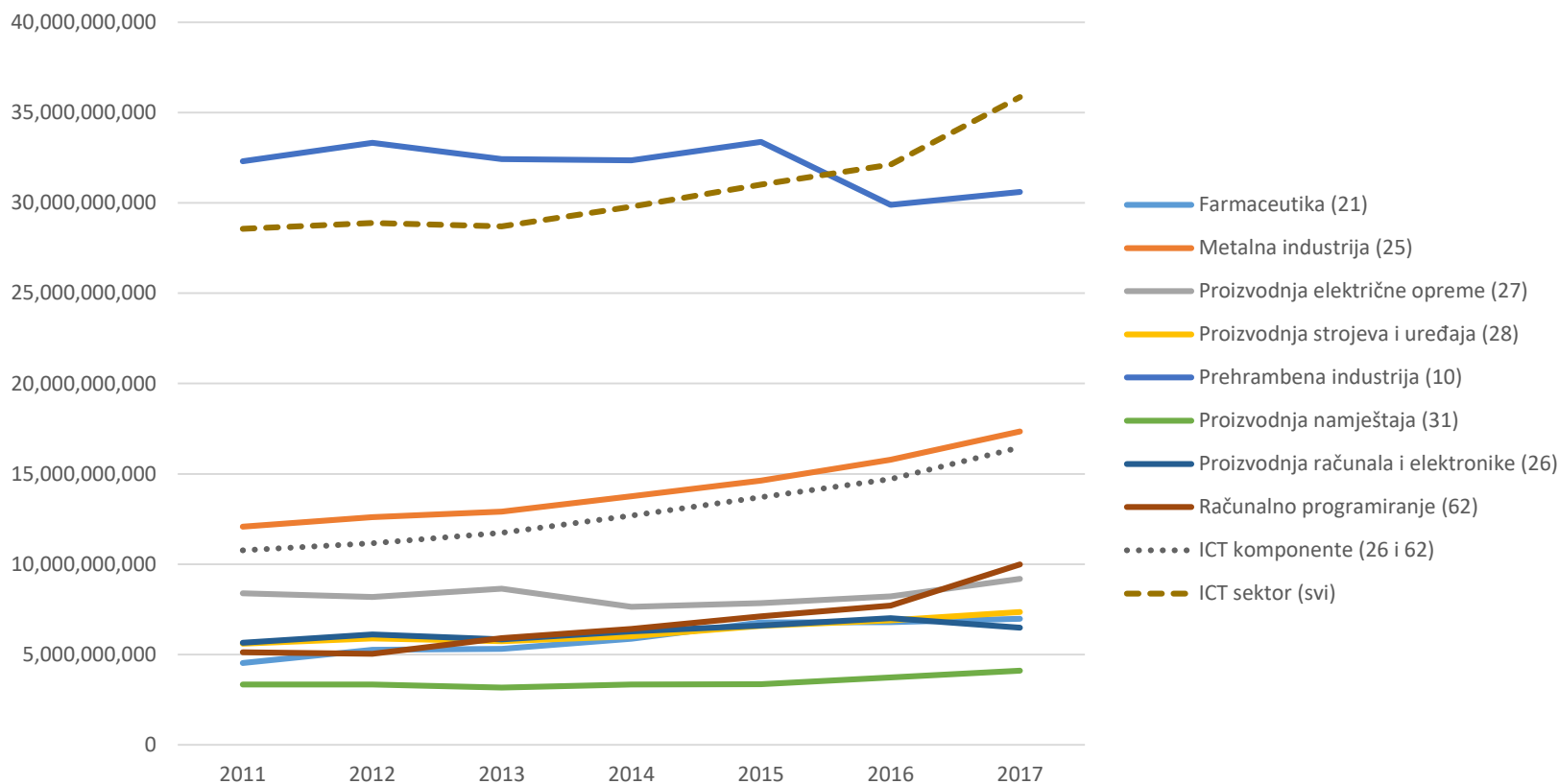
# ICT sektor ukupno





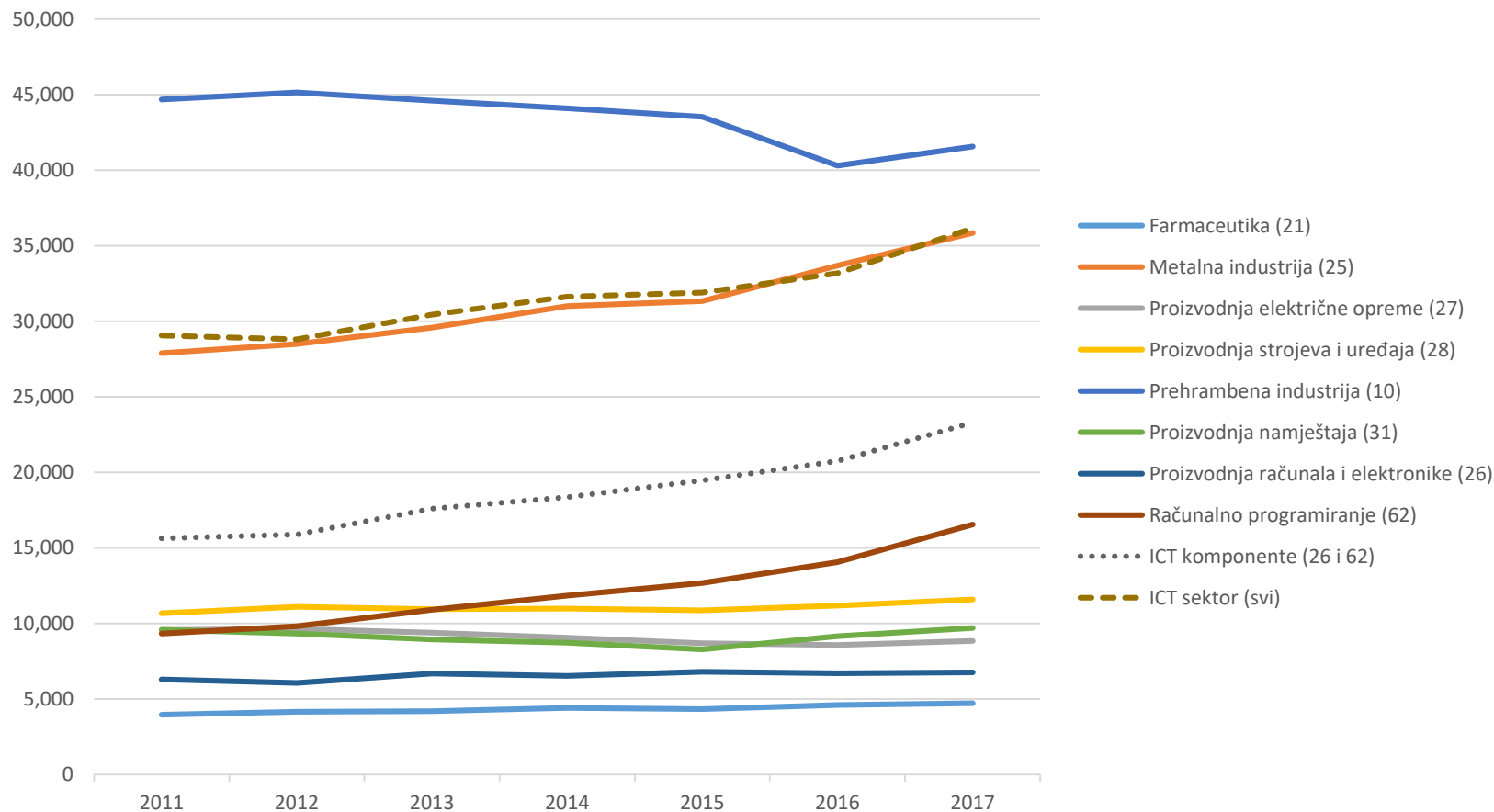
# Prihod industrijskih „pokretača“

Chart Title



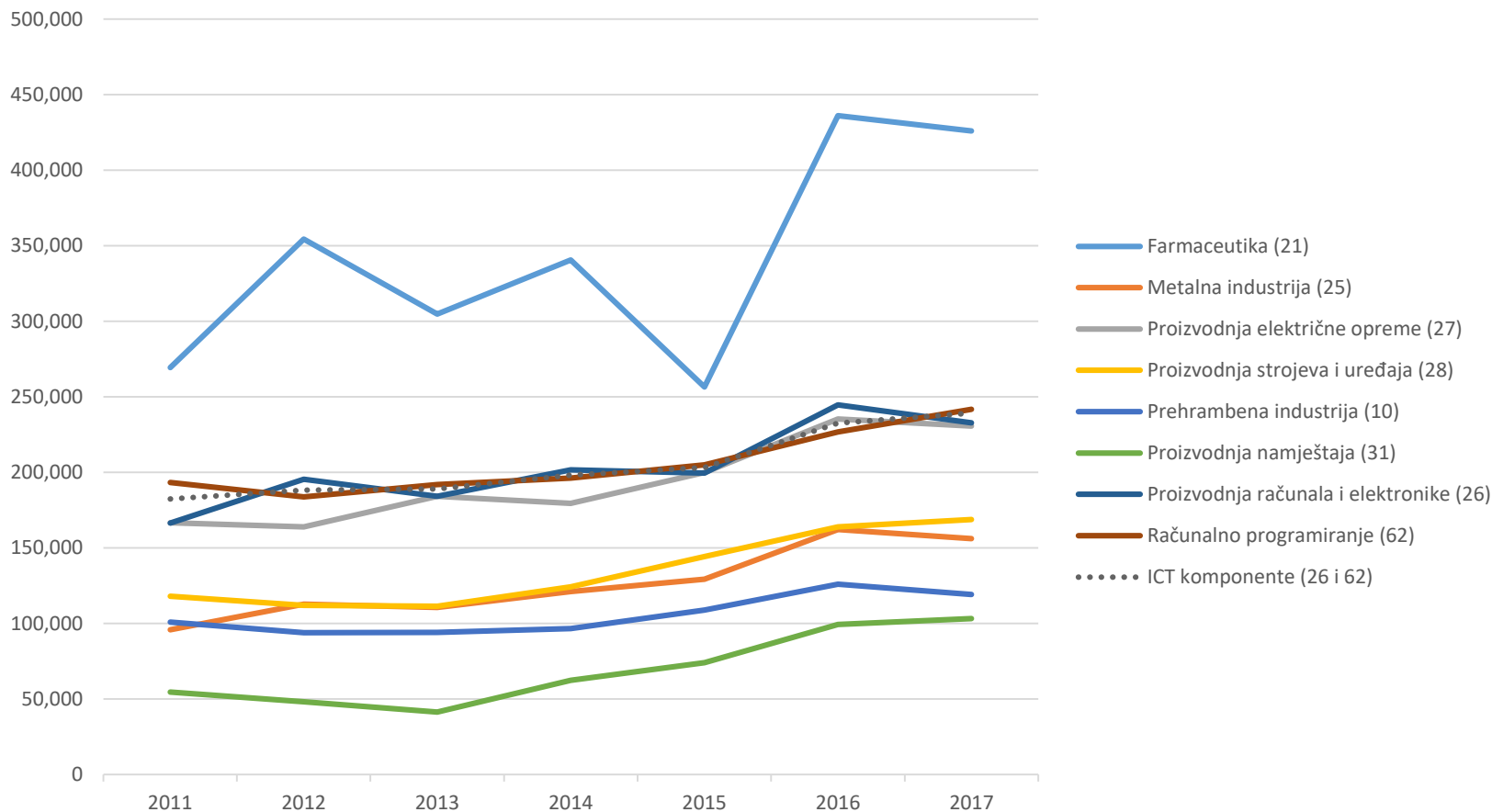


# Broj zaposlenih





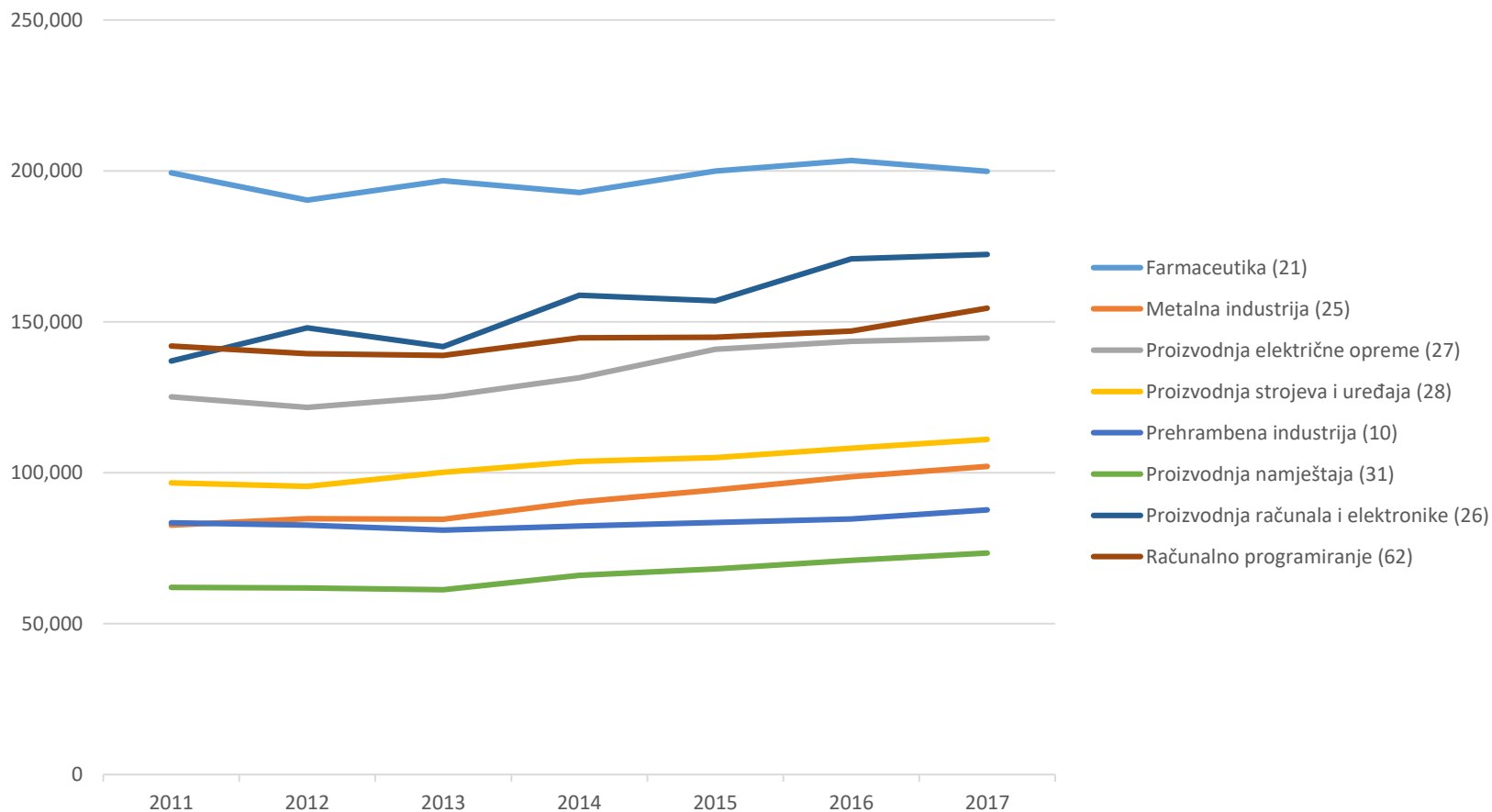
# Dodana vrijednost po zaposlenom





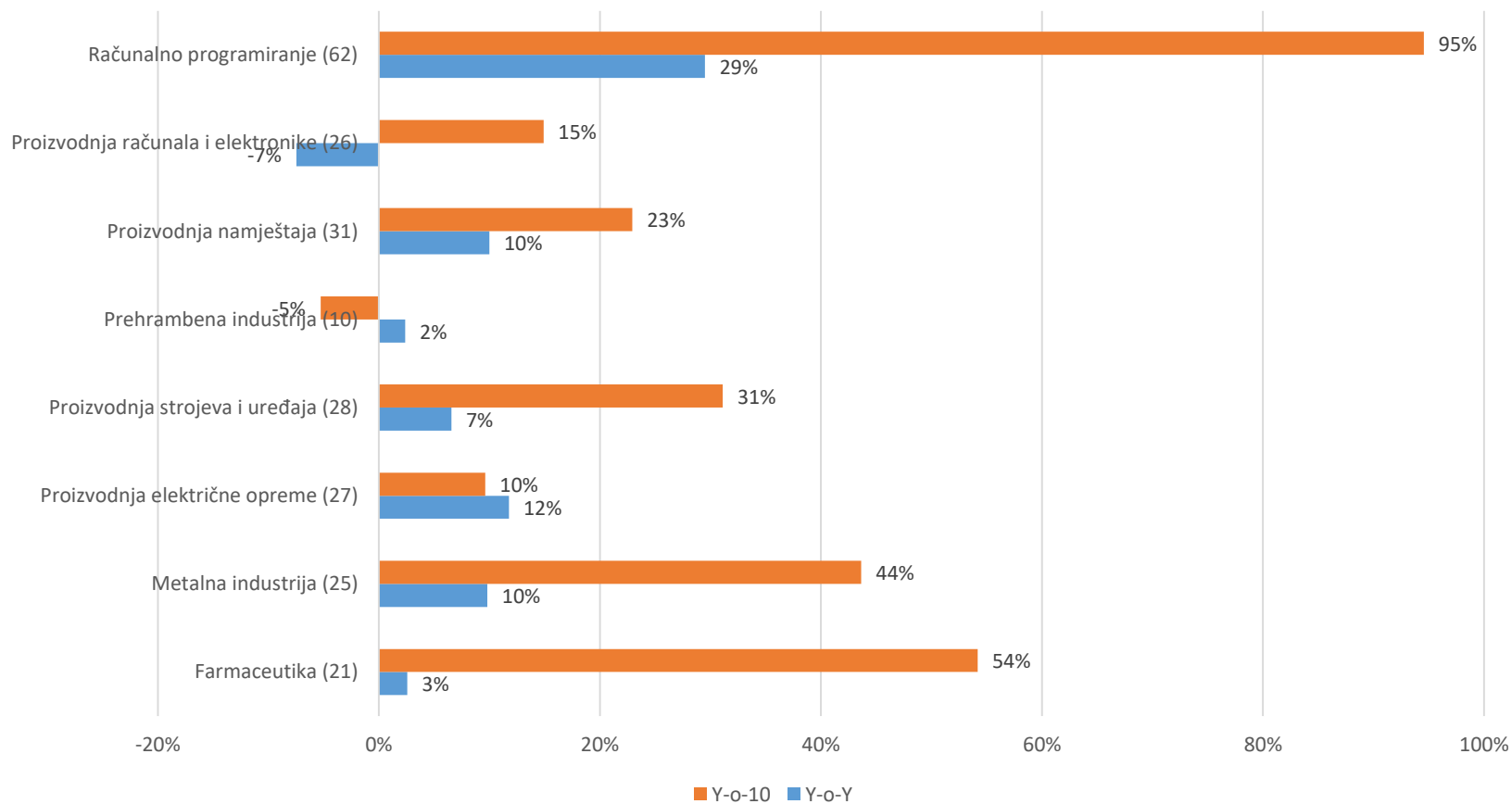


# Prosječan trošak zaposlenika



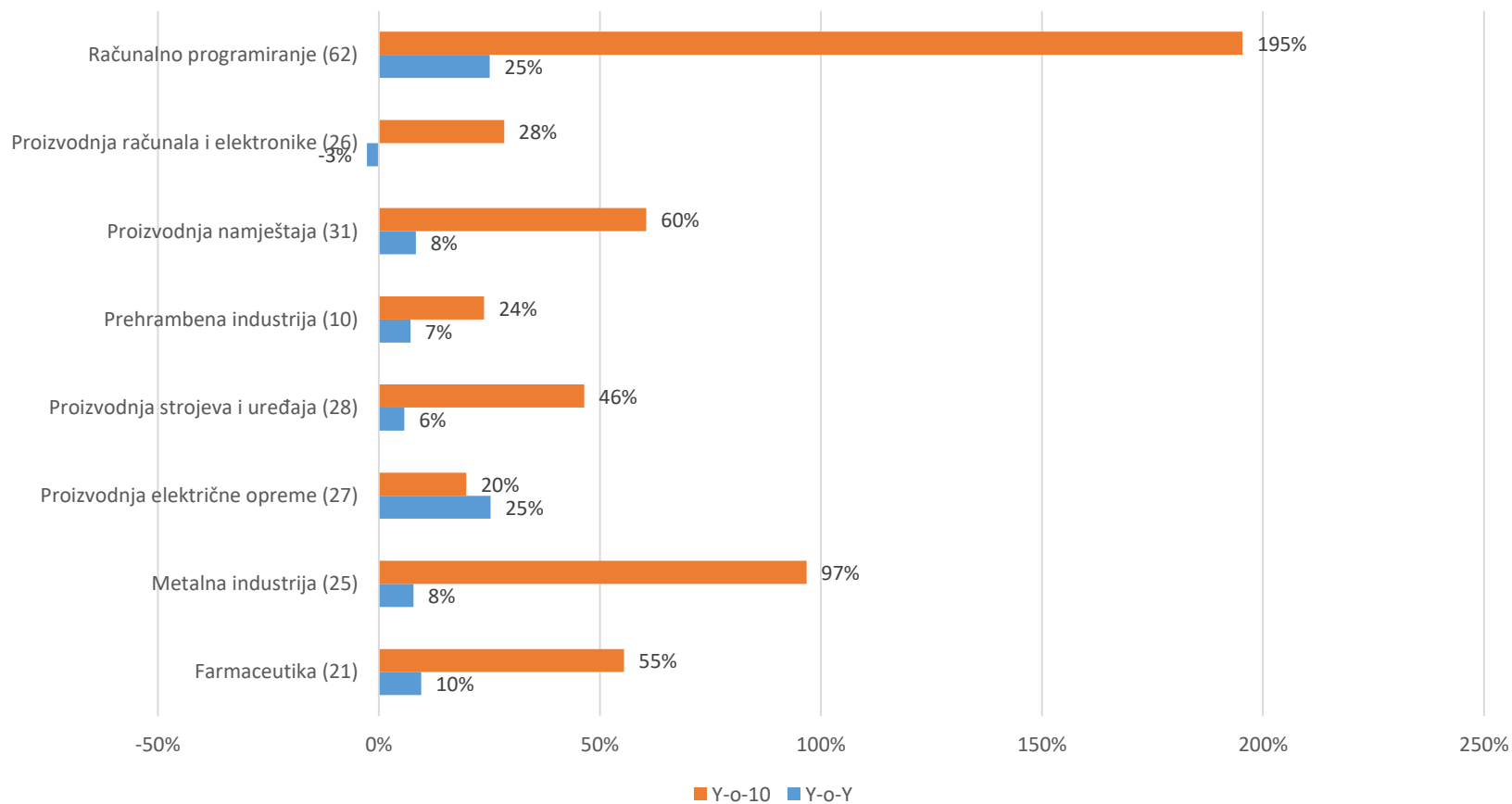


# Rast prihoda sektora



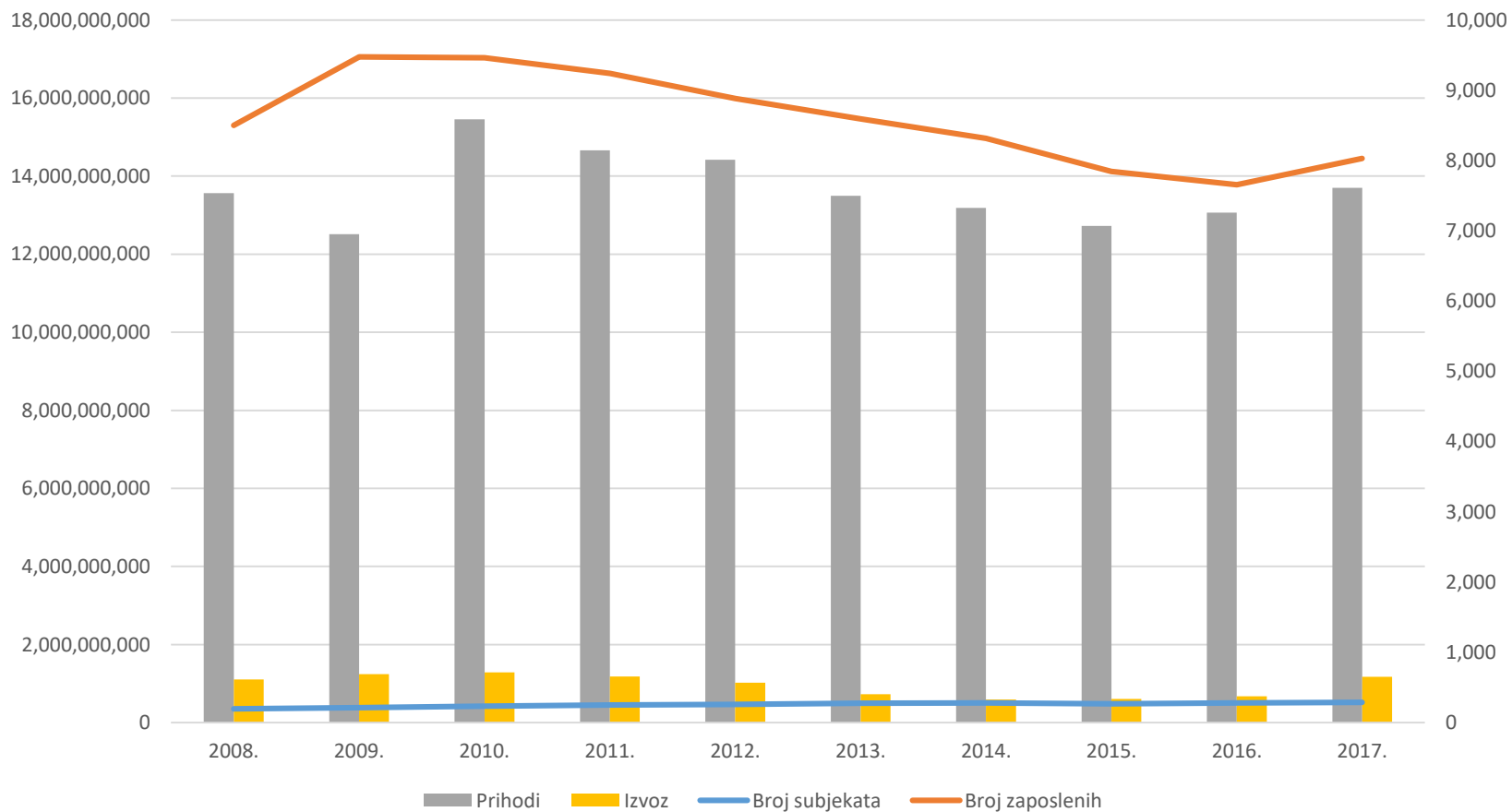


# Rast izvoza sektora





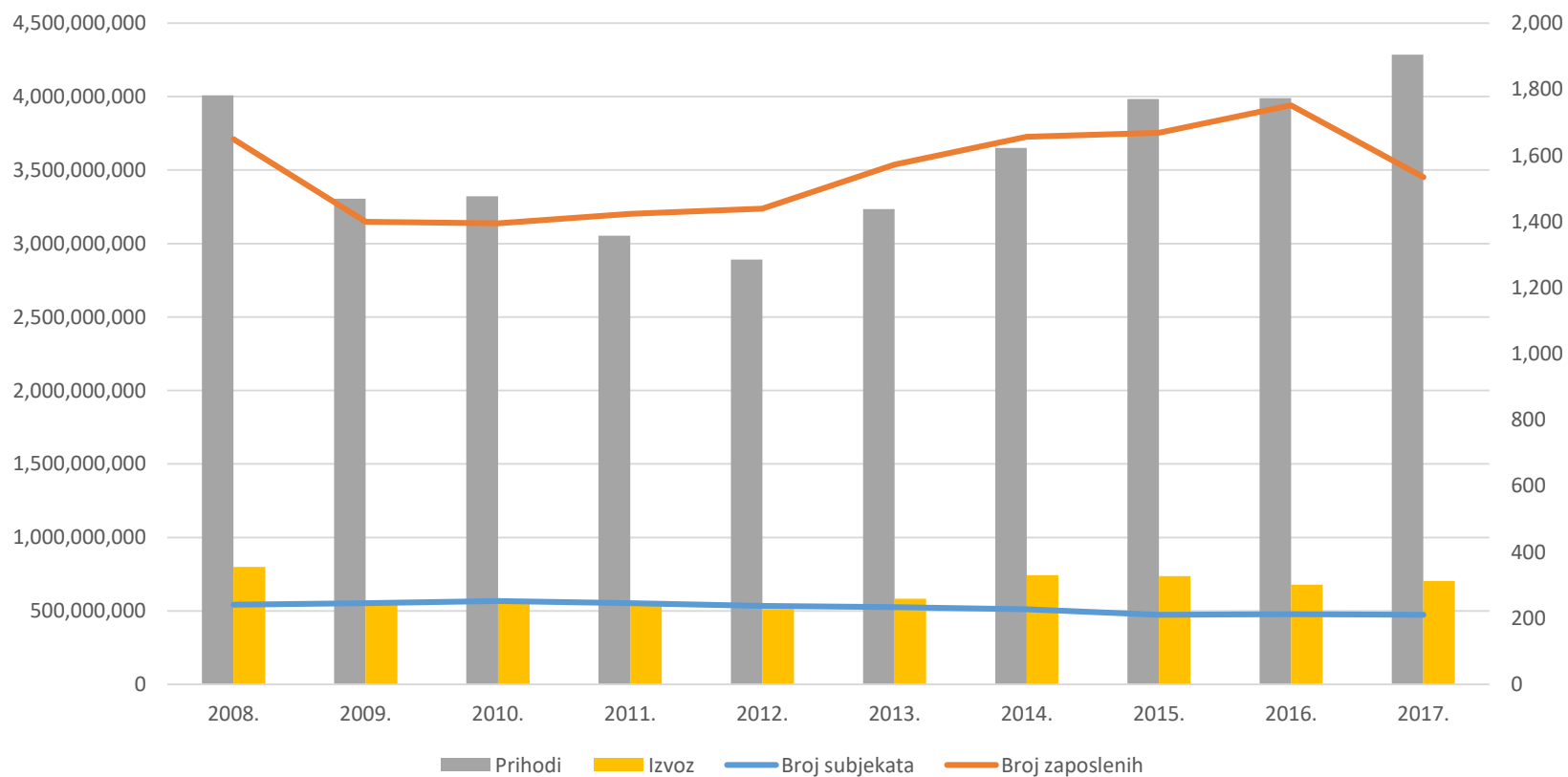
# Telekomunikacije (61)





# Proizvodnja računala (26.2)

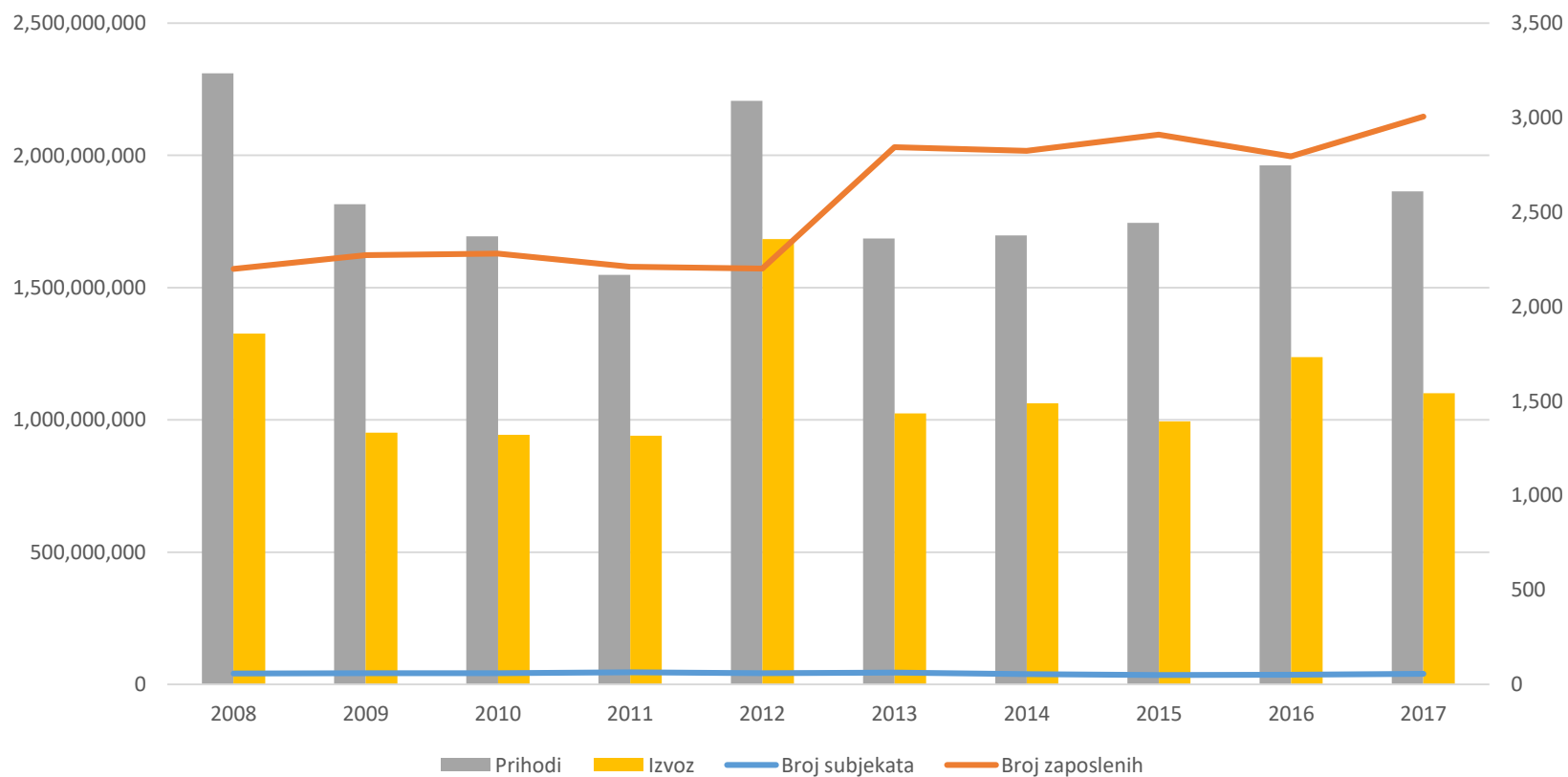
Chart Title





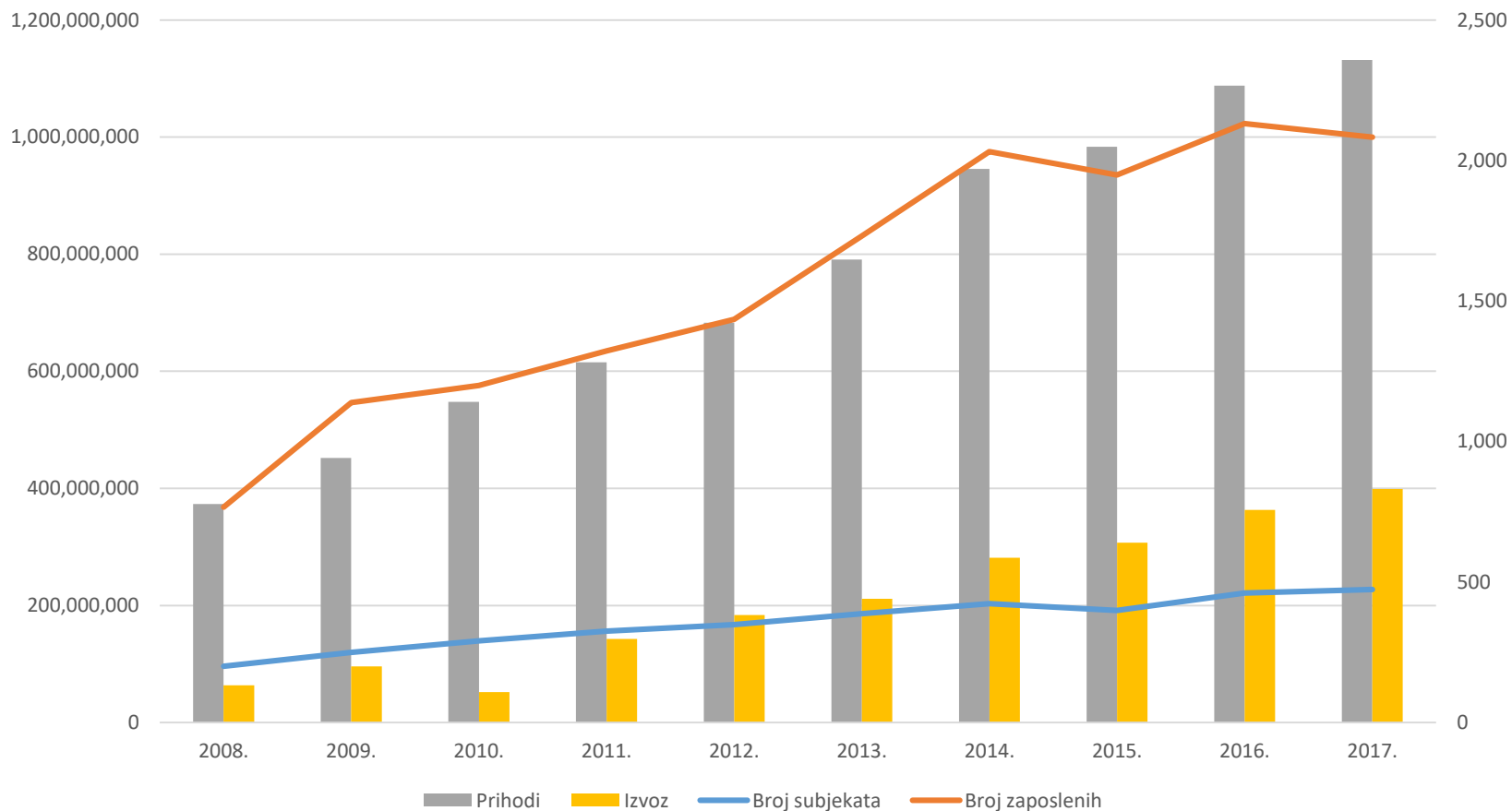
# Proizvodnja računala (26.3)

Chart Title



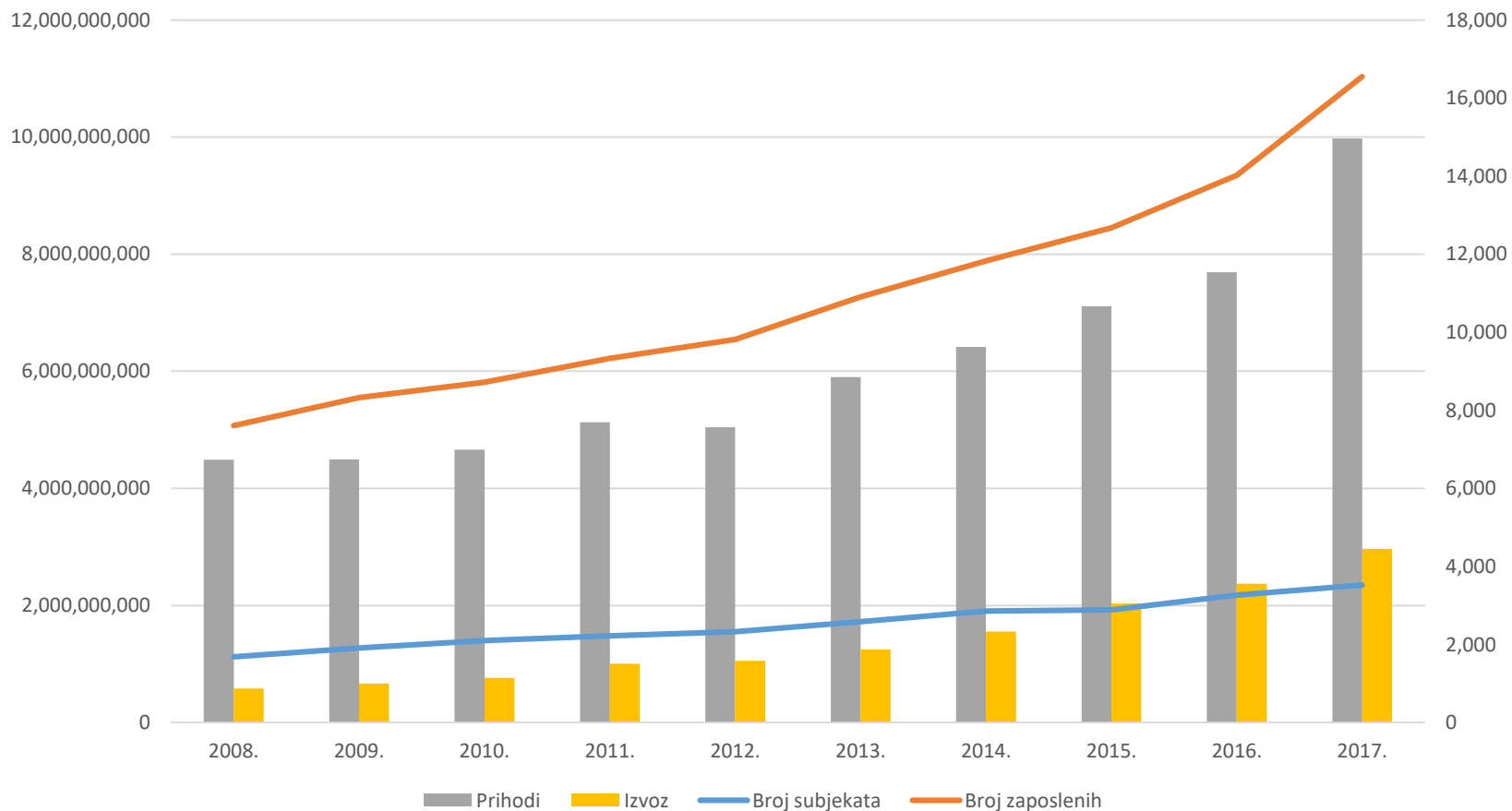


# Obrada podataka (63.1)





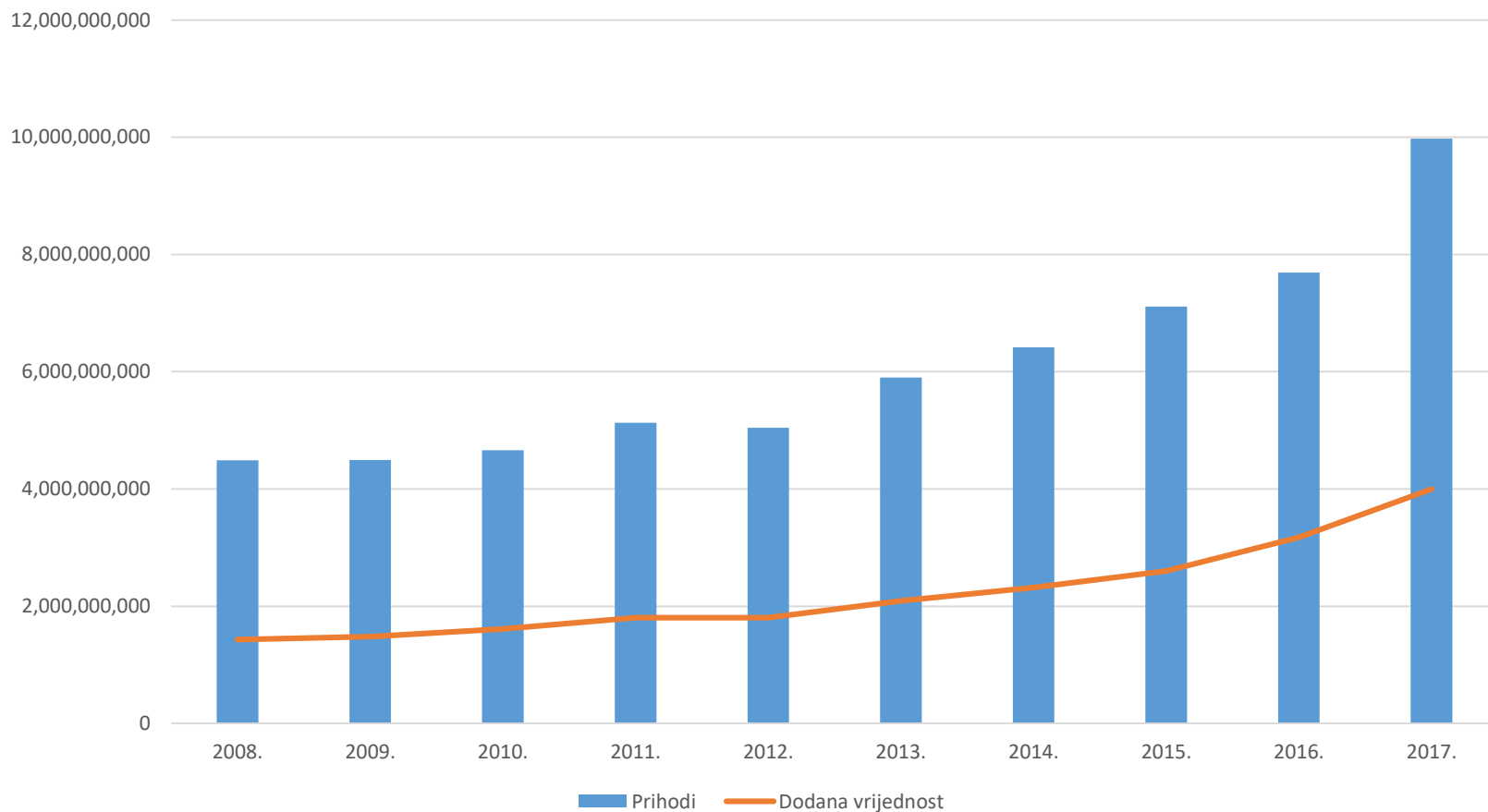
# Računalno programiranje (62)





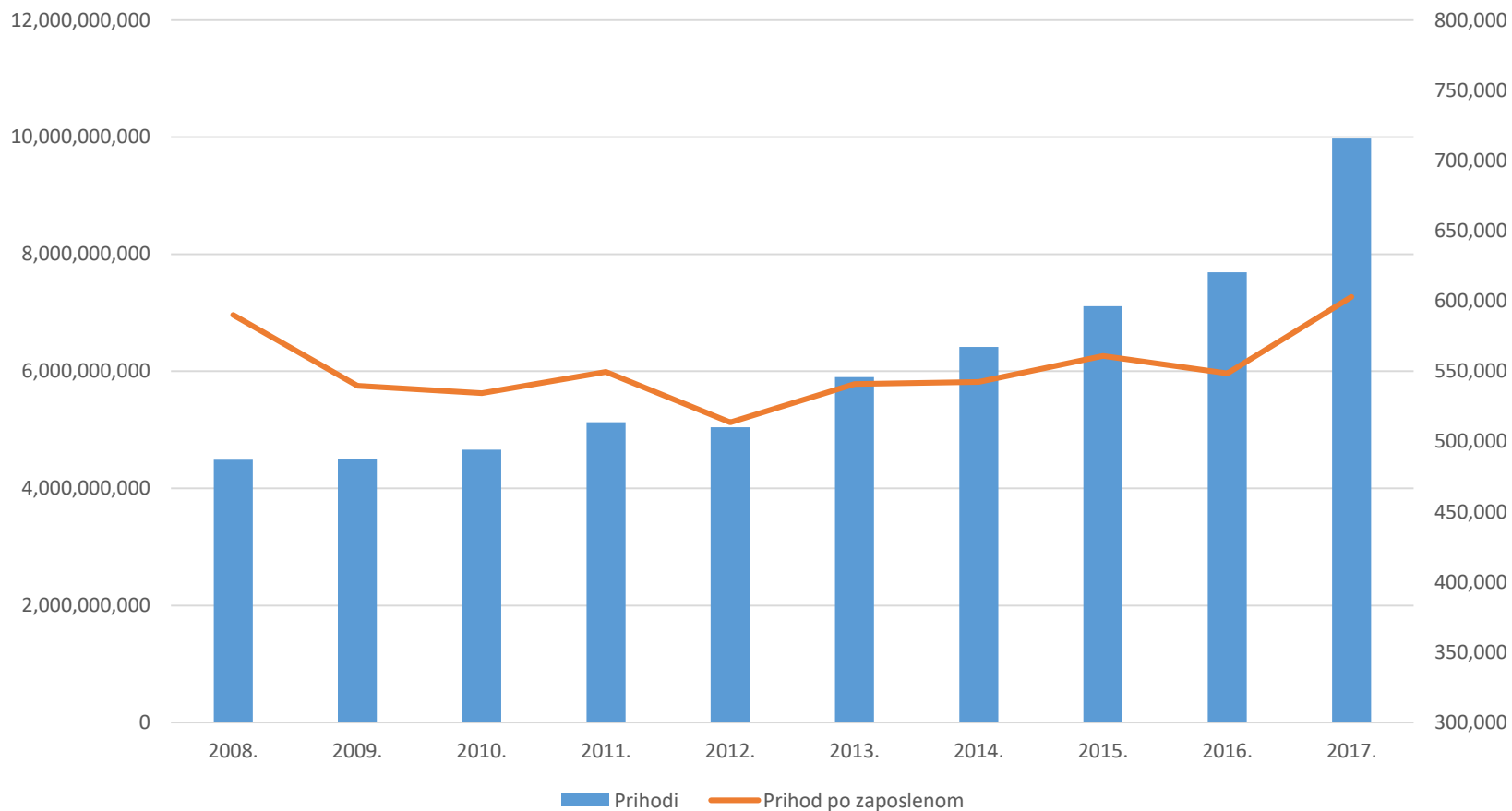


# Računalno programiranje (62)



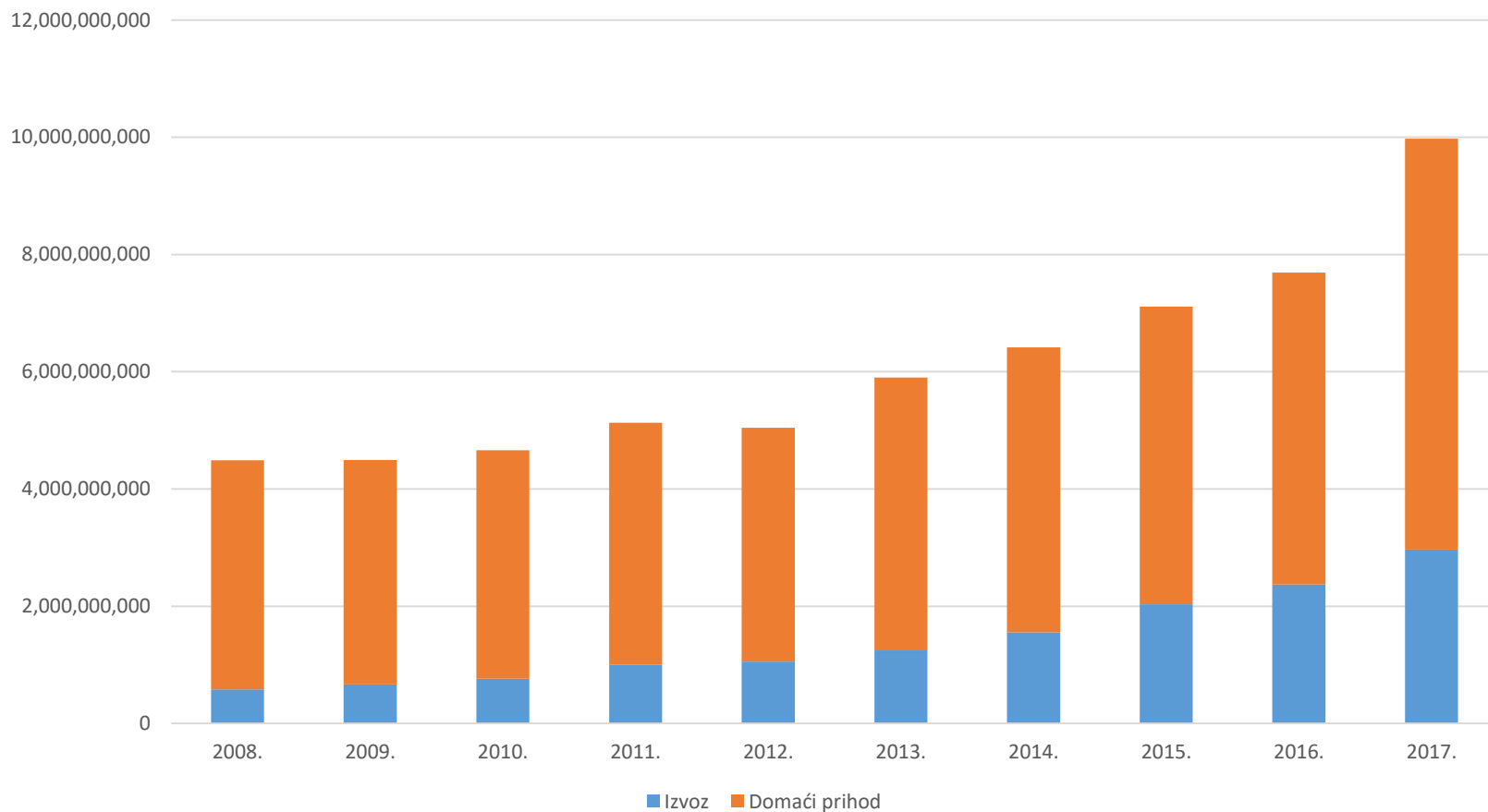


# Računalno programiranje (62)



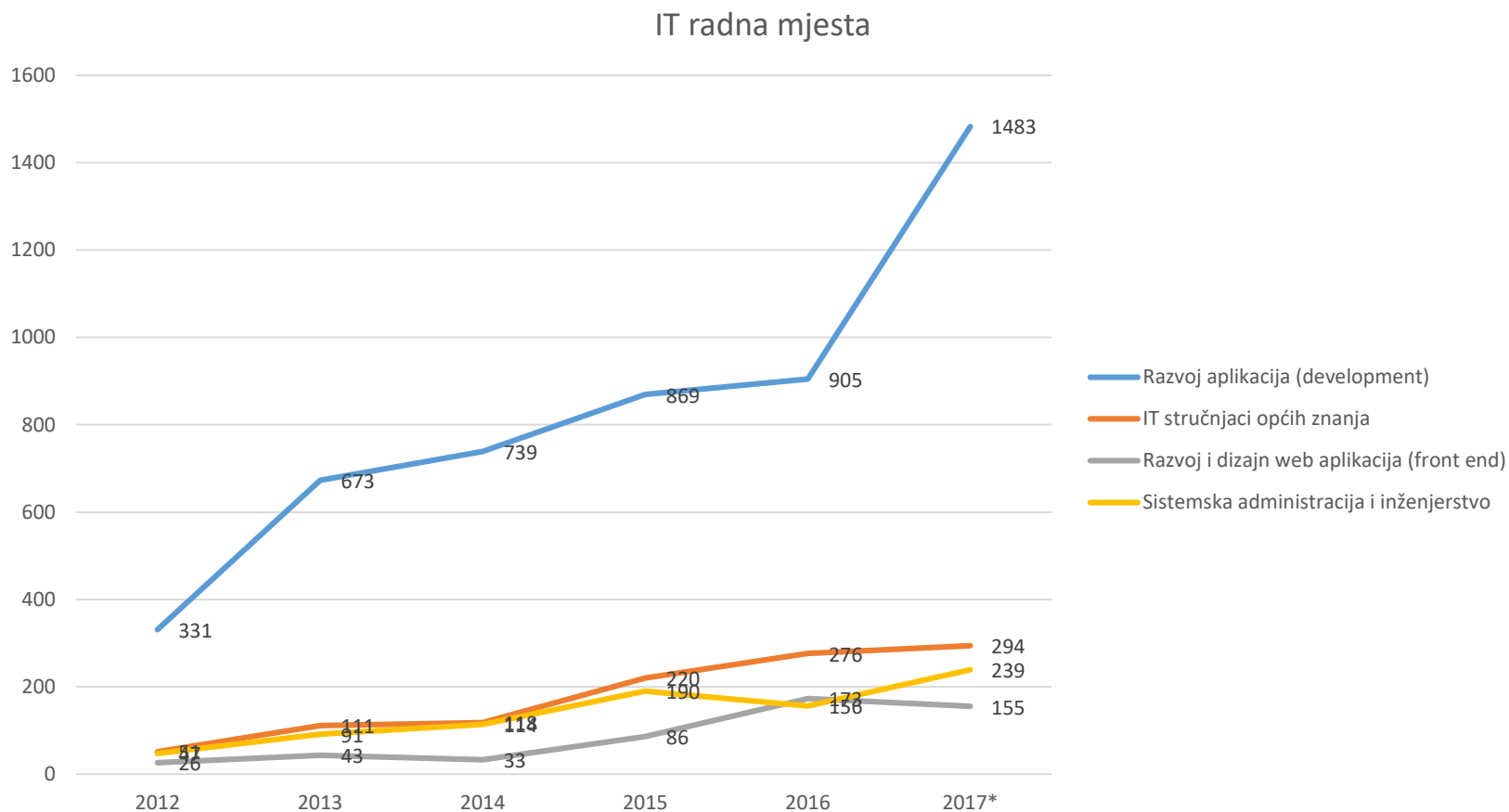


# Računalno programiranje (62)





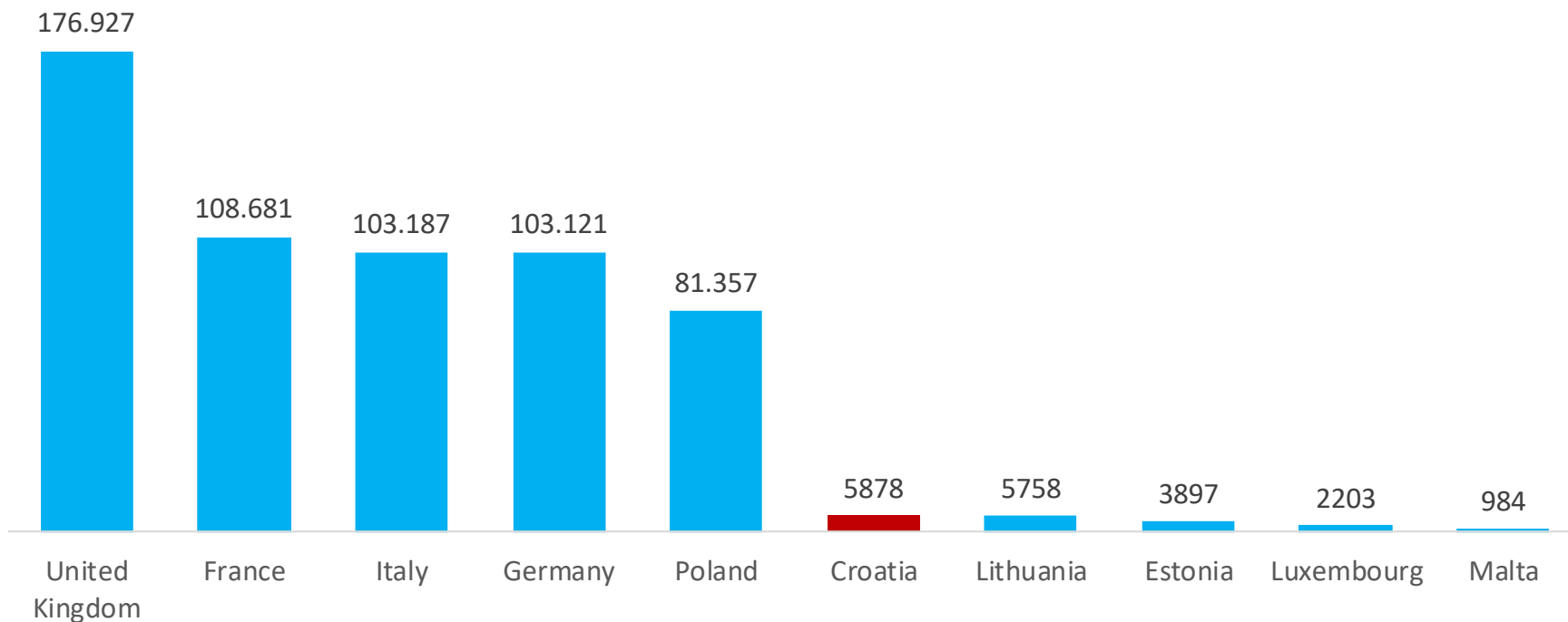
# Oglašena radna mjesta ICT



<b>Education level</b>	<b>Year</b>	<b>count</b>	<b>min</b>	<b>max</b>	<b>deviation</b>	<b>avg</b>
<b>SSS</b>	2012	1.346	2.842	18.417	2.097	6.120
	2013	835	2.900	30.000	2.234	5.923
	2014	786	2.700	20.000	2.178	5.952
	2015	895	2.500	18.717	2.444	6.140
	2016	679	2.500	18.208	2.637	6.392
	2017	625	2.800	24.625	2.779	6.582
<b>Stručni prvostupnik</b>	2012	842	2.999	20.833	2.381	6.934
	2013	478	3.000	19.333	2.263	6.607
	2014	552	3.000	18.000	2.425	6.710
	2015	590	3.000	18.167	2.415	6.775
	2016	436	2.850	22.042	2.525	7.050
	2017	413	3.000	19.000	2.541	7.170
<b>VSS (Magistar struke)</b>	2012	2.592	3.000	19.633	2.375	7.869
	2013	1.535	3.000	90.125	3.102	7.626
	2014	1.638	3.000	85.000	3.687	7.837
	2015	1.920	2.480	31.630	2.653	8.012
	2016	1.541	3.000	26.000	2.875	8.317
	2017	1.408	2.620	25.667	2.840	8.571
<b>Sveučilišni prvostupnik</b>	2012	536	3.000	19.292	2.353	6.600
	2013	364	2.828	15.250	2.308	6.279
	2014	450	2.500	15.250	2.242	6.162
	2015	584	2.870	19.333	2.189	6.100
	2016	502	2.500	27.650	2.585	6.400
	2017	505	3.000	34.167	2.681	6.622
<b>Postdiplomski /MBA poslovna škola</b>	2012	142	5.200	18.000	2.499	10.542
	2013	79	3.467	19.500	3.250	10.012
	2014	96	3.000	18.242	2.885	10.280
	2015	81	4.325	21.042	3.392	11.104
	2016	64	4.200	28.458	4.244	10.175
	2017	49	4.650	19.500	3.243	10.942



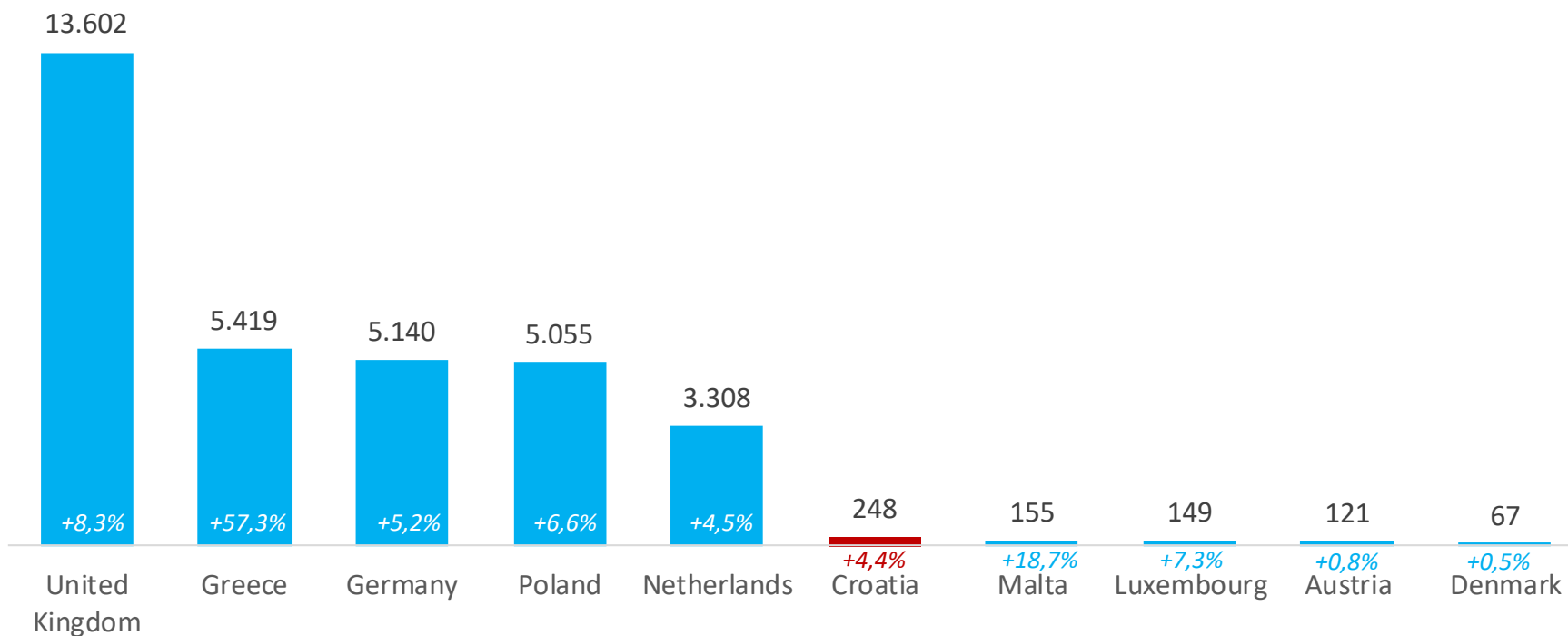
# Broj ICT tvrtki u EU



Izvor: Eurostat; Analiza: Span Research



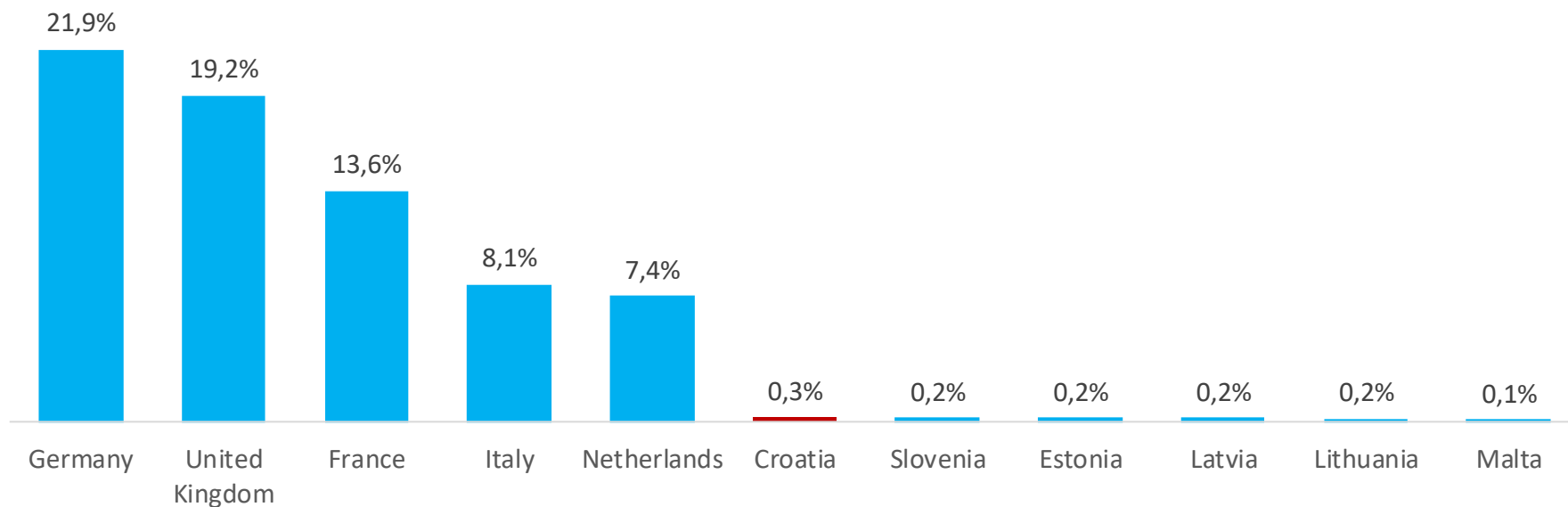
# Porast broja ICT tvrtki



Izvor: Eurostat; Analiza: Span Research



# Udio prihoda ICT tvrtki u EU

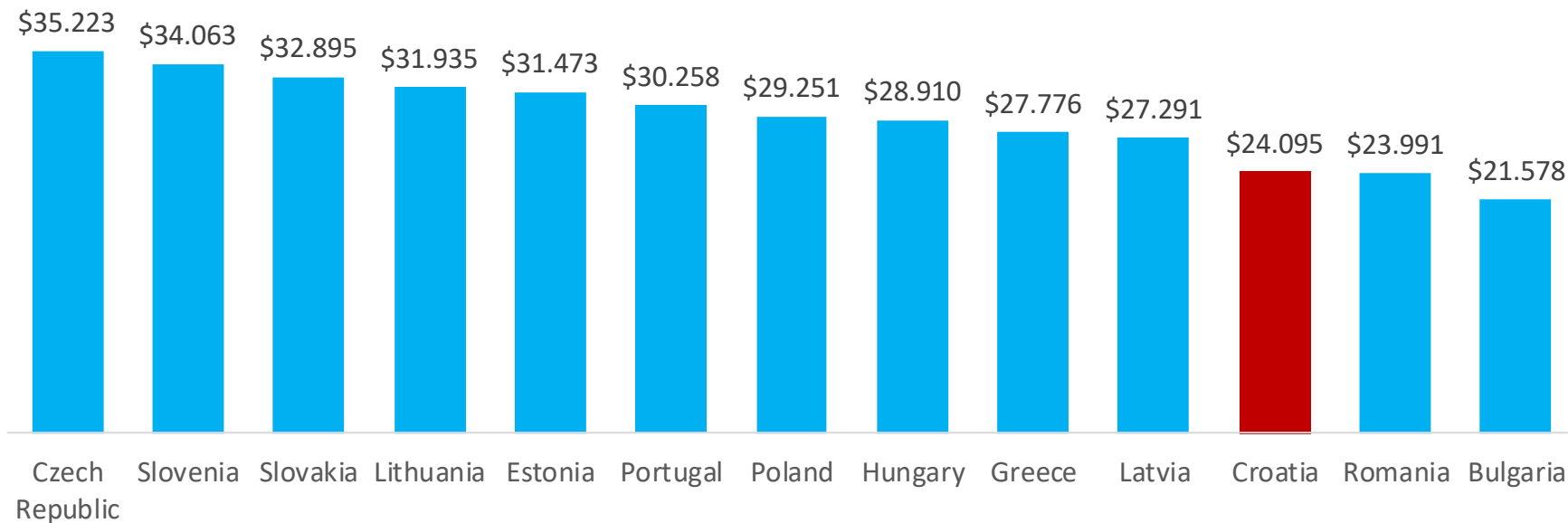


Izvor: Eurostat; Analiza: Span Research





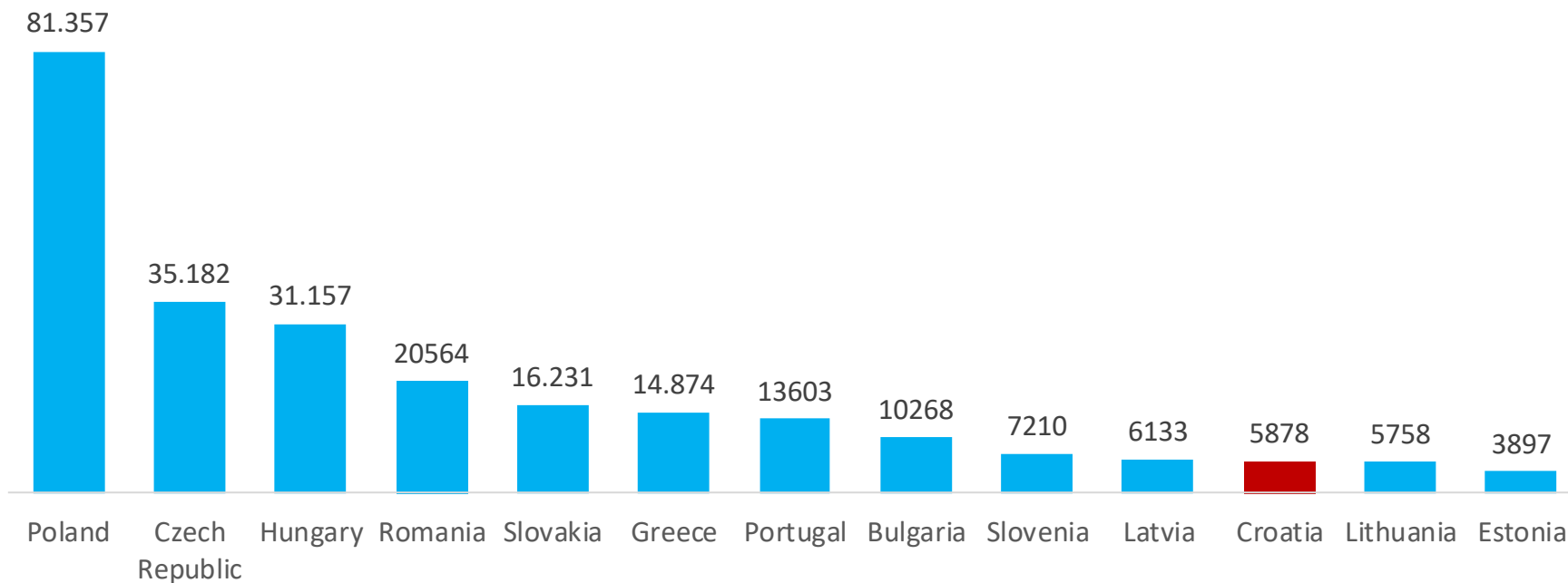
# Zemlje EU do 35.000 USD GDP-a per capita (PPP)



Izvor: IMF; Analiza: Span Research



# Broj ICT tvrtki u odabranoj skupini

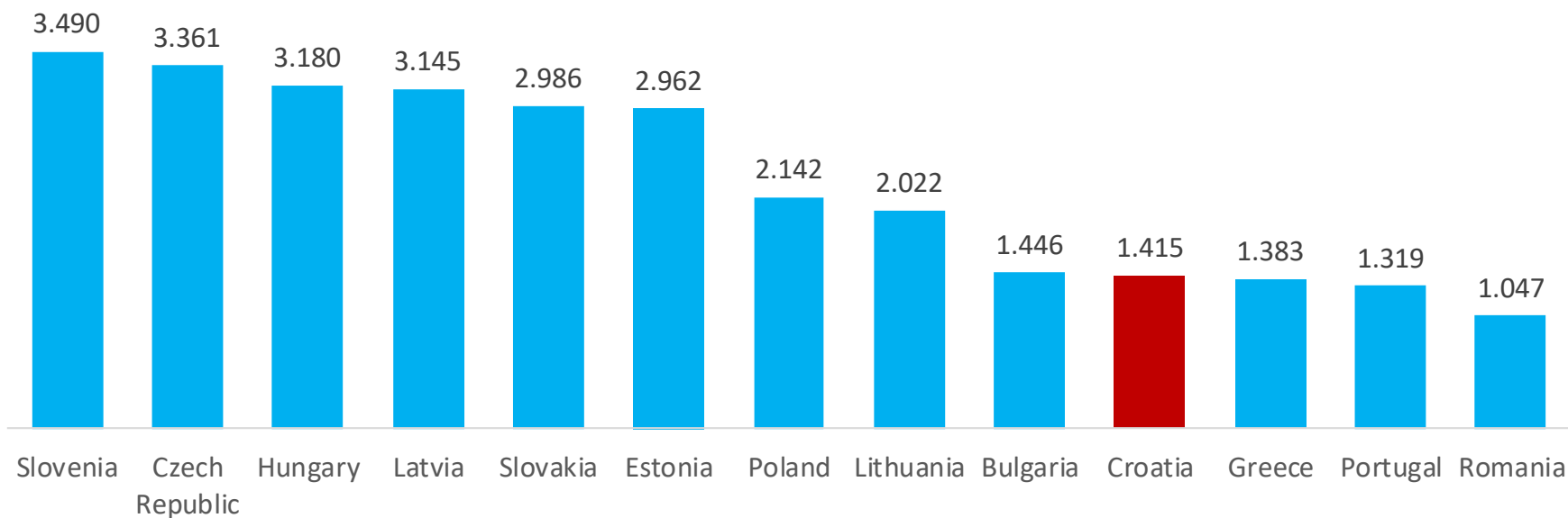


Izvor: Eurostat; Analiza: Span Research

Zemlje EU do 35.000 USD GDP-a per capita (PPP)



# Broj ICT tvrtki na milijun stanovnika

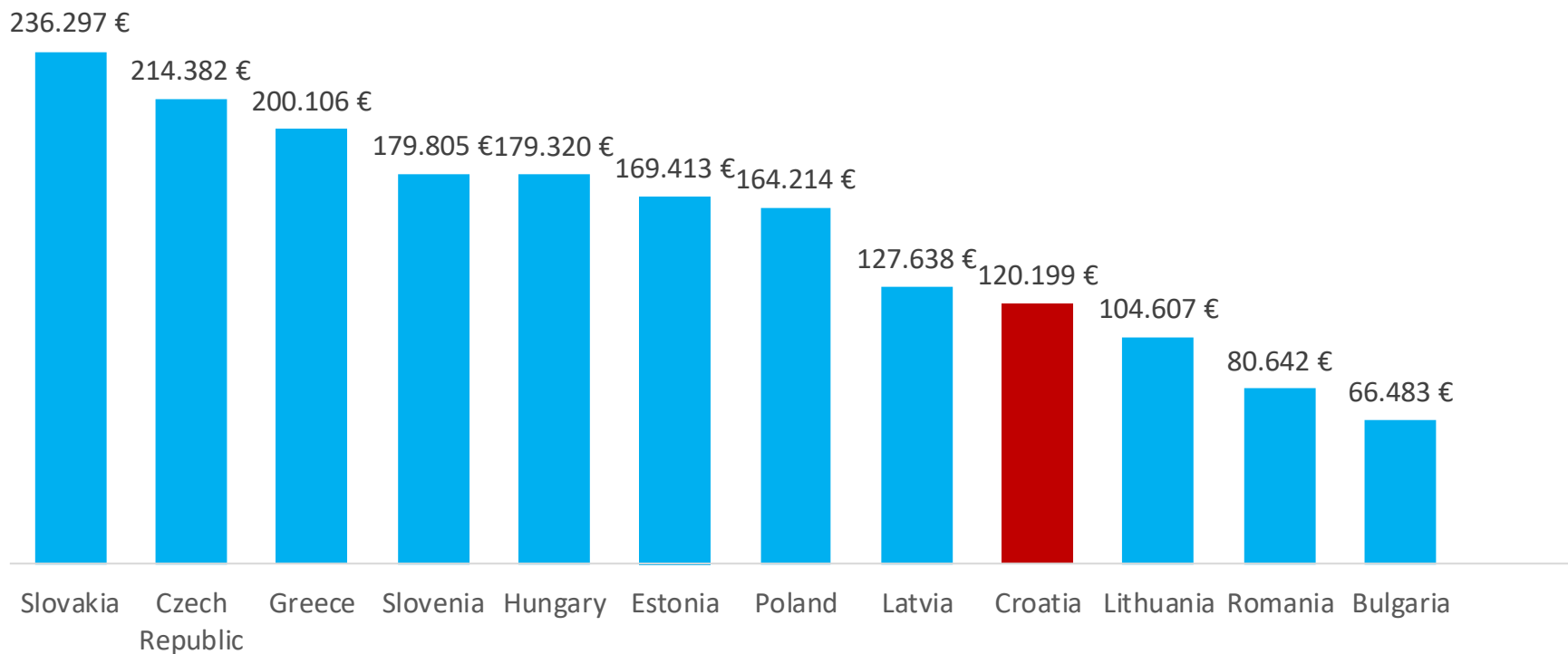


Izvor: Eurostat; Analiza: Span Research

Zemlje EU do 35.000 USD GDP-a per capita (PPP)



# Prihod po zaposlenom u ICT sektoru

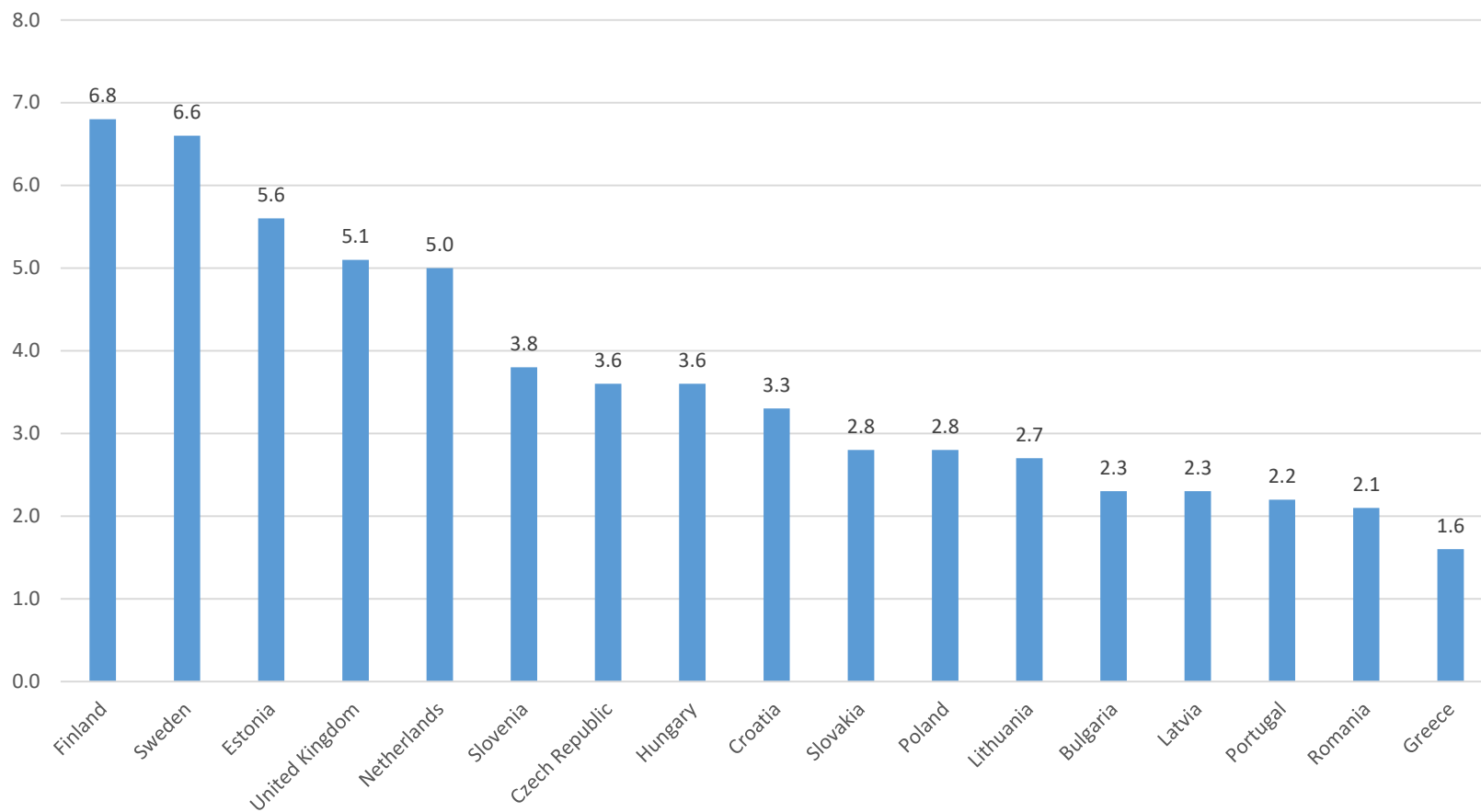


Izvor: Eurostat; Analiza: Span Research

Zemlje EU do 35.000 USD GDP-a per capita (PPP)



# Udio ICT profesionalaca





# ICT Sector Growth Simulation

ICT POTENCIJAL	PRIHOD	BROJ ZAPOSLENIH	IZVOZ (~UDIO U PRIHODU)
<b>2016.</b>	32 milijarde kn	33.181	6 milijardi kn (~19%)
<b>2017.</b>	35 milijardi kn	36.151	7,3 milijarde kn (~20.8%)
<b>2025.</b>	45 milijardi kn	55.000	12 milijardi kn (~26%)

RAČUNALNO PROGRAMIRANJE	PRIHOD	BROJ ZAPOSLENIH	IZVOZ (~UDIO U PRIHODU)
<b>2016.</b>	7,7 milijardi kn	14.019	2,4 milijardi kn (~31%)
<b>2017.</b>	9,9 milijardi kn	16.550	2,9 milijardi kn (~29%)
<b>2025.</b>	18 milijardi kn	28.000	7,2 milijard kn (~40%)