

HROUG

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Kriza – što smo naučili te gdje tražiti prostor za rast ?

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Trendovi u 2011: IT analitičari

Global business strategies place a new emphasis on growth

Business strategies	Ranking of business strategies CIOs selected as one of their top 3 in 2011 and projected for 2014				
	2011	2010	2009	2008	2014
Increasing enterprise growth	1	*	*	*	1
Attracting and retaining new customers	2	5	4	2	3
Reducing enterprise costs	3	2	2	5	6
Creating new products or services (innovation)	4	6	8	3	4
Improving business processes	5	1	1	1	13
Implementing and updating business applications	6	*	*	*	12
Improving the technical infrastructure	7	*	*	*	7
Improving enterprise efficiency	8	*	*	*	10
Improving operations	9	*	*	*	2
Improving business continuity, risk and security	10	*	*	*	23
Expanding into new markets and geographies	11	13	10	4	5
Attracting and retaining the workforce	12	4	3	6	8
Introducing and improving business channels	15	15	*	*	9

*New response category

Global CIO strategies focus on creating new infrastructures for growth and efficiency

CIO IT strategies	Ranking of IT strategies CIOs selected as one of their top 3 in 2011			
	2011	2010	2009	2008
Developing or managing a flexible infrastructure	1	8	11	11
Delivering application and growth projects	2	1	3	1
Reducing the cost of IT	3	3	2	10
Improving IT management and governance	4	6	4	7
Consolidating IT operations and resources	5	9	9	12
Reorganizing IT (attracting/retaining IT personnel)	6	10	8	3
Expanding the use of information/intelligence	7	7	10	9
Implementing business process improvements	8	4	5	6
Implementing cloud solutions (IaaS, PaaS, SaaS)	9	*	*	*
Improving/linking the business-IT relationship	10	2	1	2

*New response category

CIO technology priorities reflect a transformation in infrastructure

CIO technologies	Ranking of technologies CIOs selected as one of their top 3 priorities in 2011			
Ranking	2011	2010	2009	2008
Cloud computing	1	2	16	*
Virtualization	2	1	3	3
Mobile technologies	3	6	12	12
IT management	4	10	*	*
Business intelligence (BI)	5	5	1	1
Networking, voice and data communications	6	4	6	7
Enterprise applications	7	11	2	2
Collaboration technologies	8	10	5	8
Infrastructure	9	14	7	6
Web 2.0	10	3	15	15

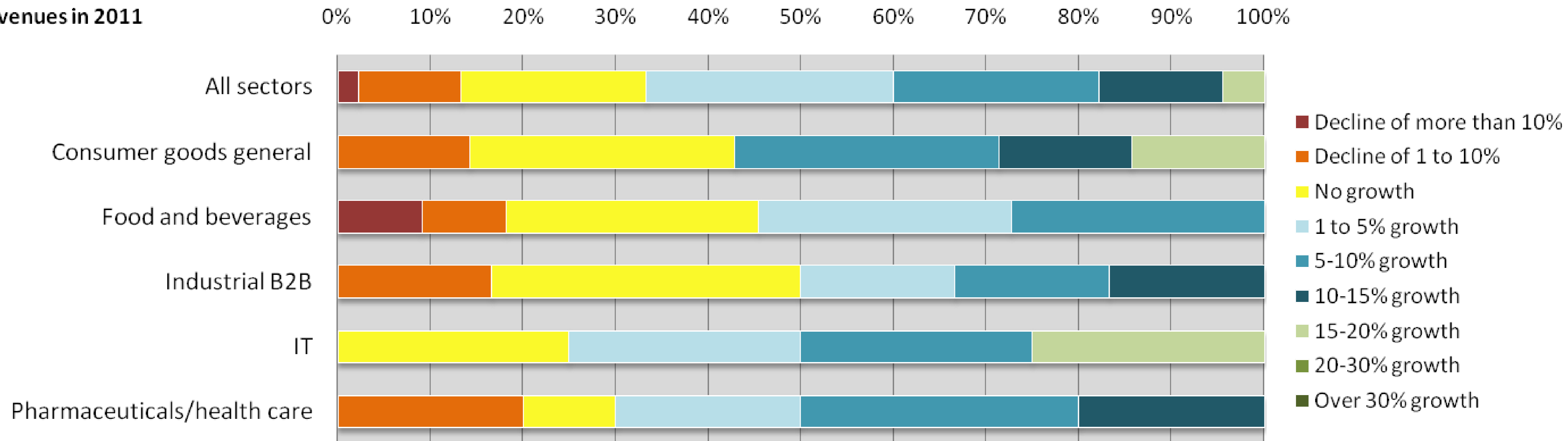
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Trendovi u 2011: ekonomski analitičari

Expected 2011 revenue trends by sector

Croatia

Revenues in 2011



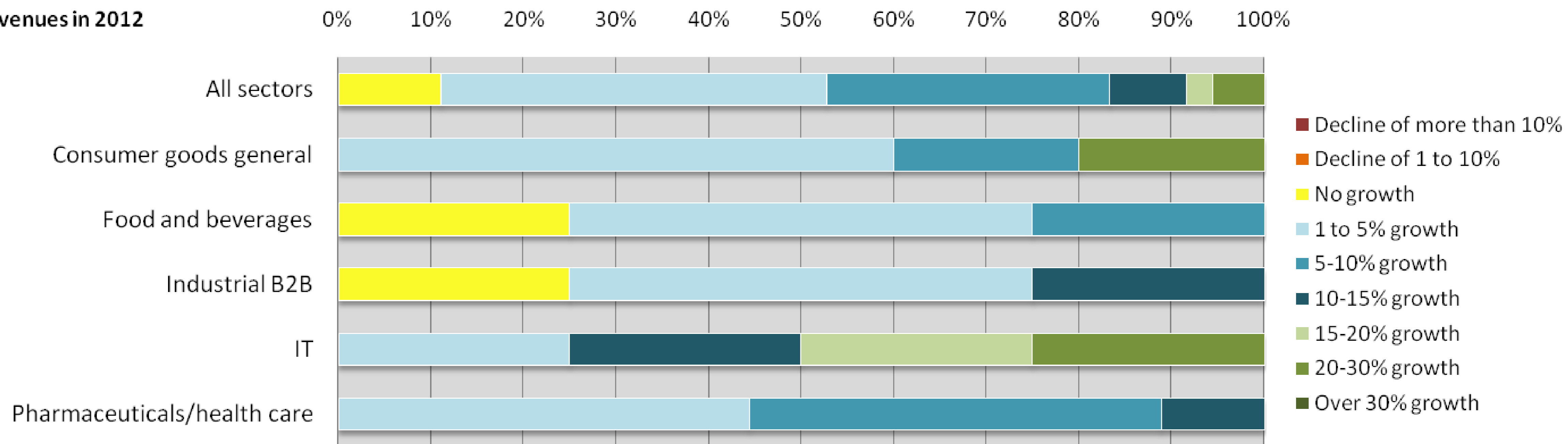
Izvor: DT-Global Business Consulting, 2010

Trendovi u 2011: ekonomski analitičari (nastavak)

Expected 2012 revenues by sector

Croatia

Revenues in 2012



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Gdje je prostor za rast ?

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Gartner

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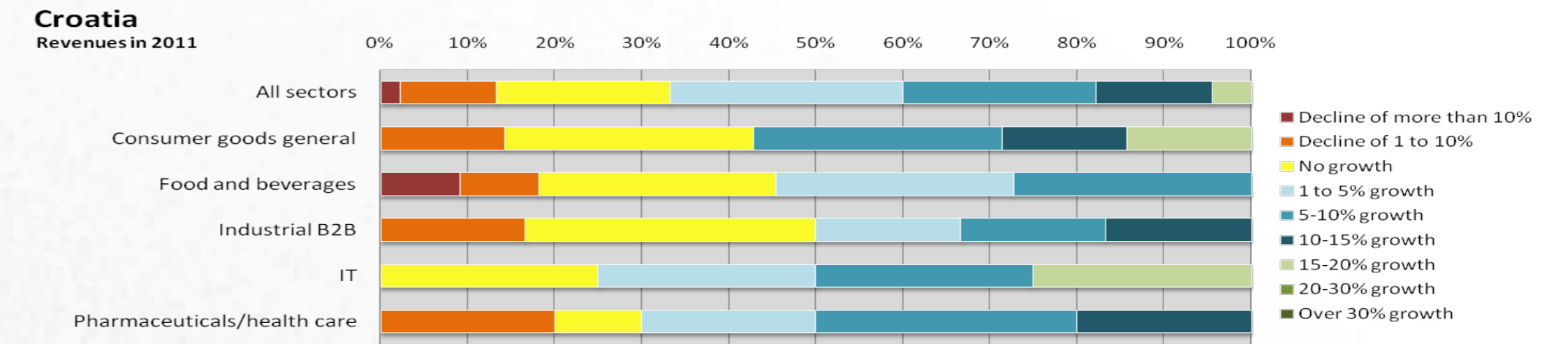
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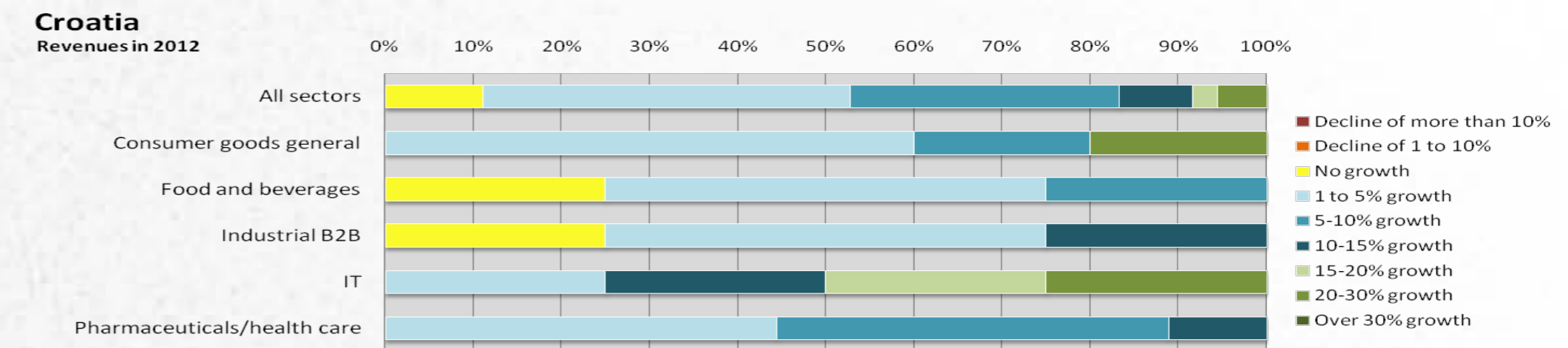
Gartner



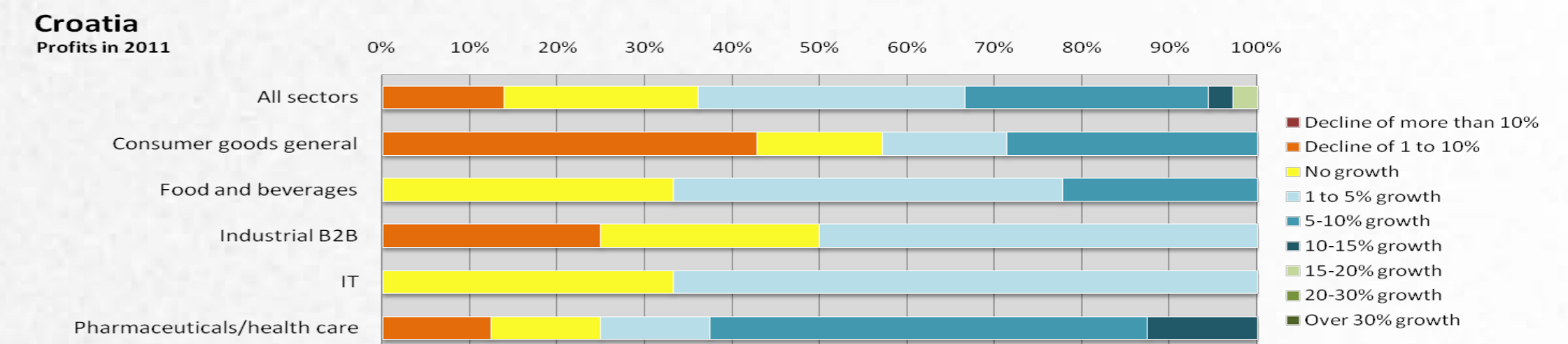
Expected 2011 revenue trends by sector



Expected 2012 revenues by sector



2011 profit expectations by sector



B: Poslovna dodana vrijednost:

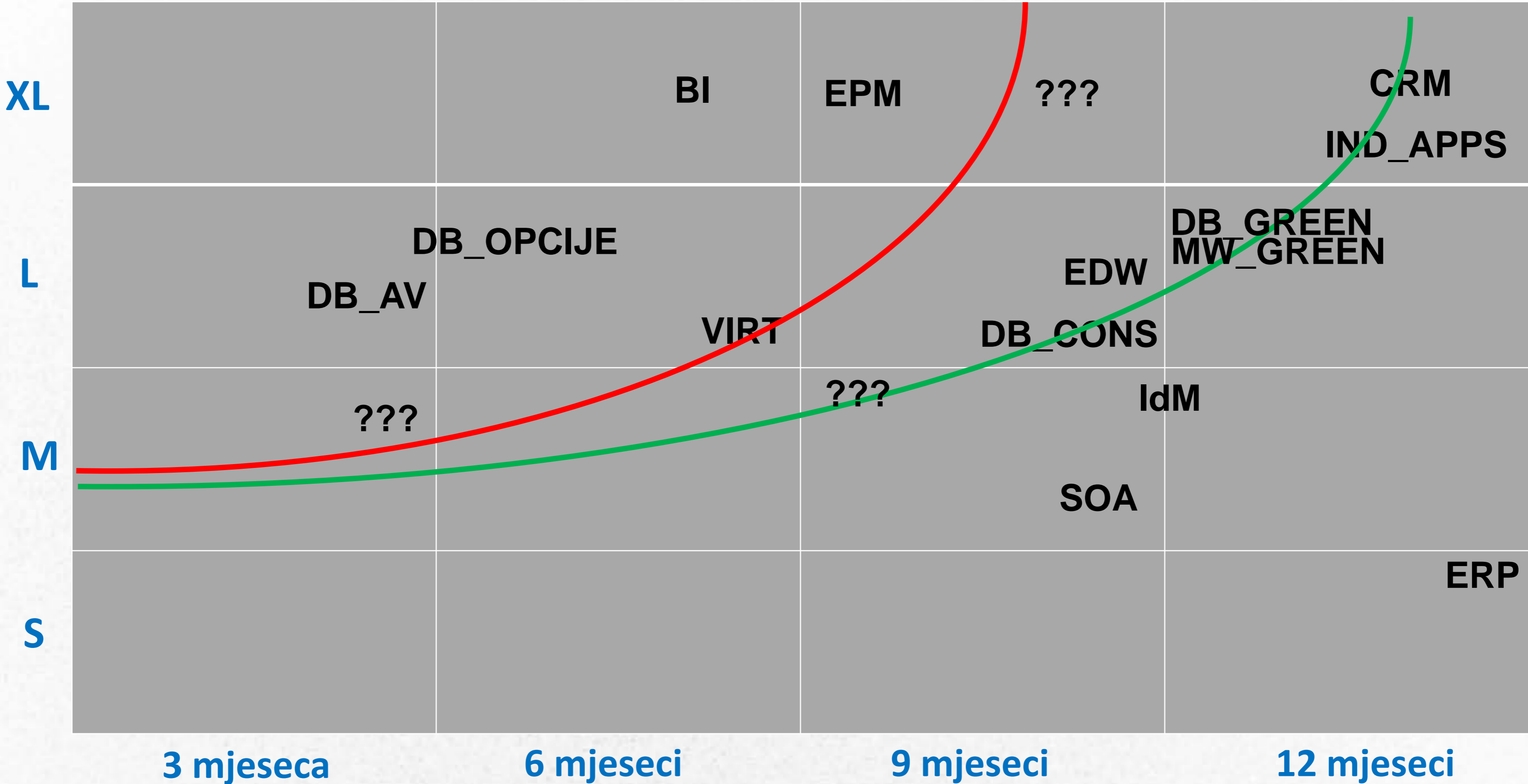
- Granularnost poslovanja ?
- Koji odjeli ostvaruju profit ?
- Koji proizvodi se dobro prodaju ?
- Kako zadržati lojalne kupce ?
- Da li možemo pridobiti nove kupce ?
- Da li su nam poslovne informacije sigurne ?
- Kako upravljamo zalihama ?
- Da li su nam odjeli/pojedinci efikasni ?
- Da li trebamo ove godine novi HW ?
- Da li možemo poboljšati performanse postojećeg sustava ?

T: Vrijeme realizacije:

- Da li rezultati mogu biti vidljivi ≤ 6 mjeseci ?

Prioriteti

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Table 5 External debt as a % of GDP

Country	2010	2011
Poland	65	65
Hungary	141	132
Czech Republic	40	40
Slovakia	76	77
Russia	33	25
Ukraine	85	90
Romania	60	60
Bulgaria	102	97
Kazakhstan	78	75
Croatia	101	104
Serbia	83	75
Slovenia	115	120
Estonia	114	106
Latvia	156	154
Lithuania	84	80
Turkey	40	41

Source: CEEMEA Business Group research and forecasting

Note that countries should be as much as possible below 70% of GDP when it comes to external debt. Historically, countries default or need external help (or go through severe deleveraging at the expense of growth) when external debt comes close to or exceeds 70% of GDP. This percentage is not cast in stone, but it is a useful historical average that indicates elevated debt stress at household, corporate and often government levels.

These five countries that are not in bold should grow faster than the others in the next three to four years. However, note that in the short term, both the Czech Republic and Poland will go through a moderate austerity programme and that Turkey will seek to reduce its imports by massaging the currency downwards. Romania ended up in a severe crisis although its debt accumulation is not as high, but short-term liquidity issues have caused the strain and the short-term rebound will be slow.

Deleveraging from high foreign debt levels always lasts at least two years in mild cases and in extreme cases where it is over 100% of GDP it could last up to six to even eight years). And deleveraging always means a) lower growth and b) lower domestic demand.

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