

IO1/A1 Country report: Slovenia

Date (11. 04. 2021)

Glossary

EU	European Union
PEACOC	Personalised e-Business Coaching for Construction SMEs
...	

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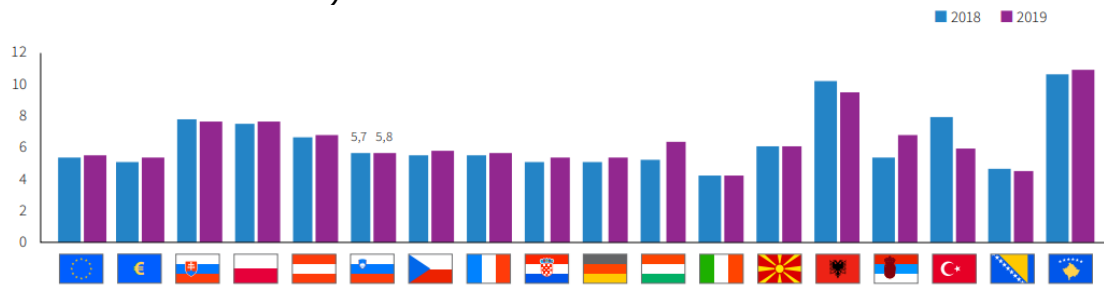
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1 Importance of the construction sector in the country economy.

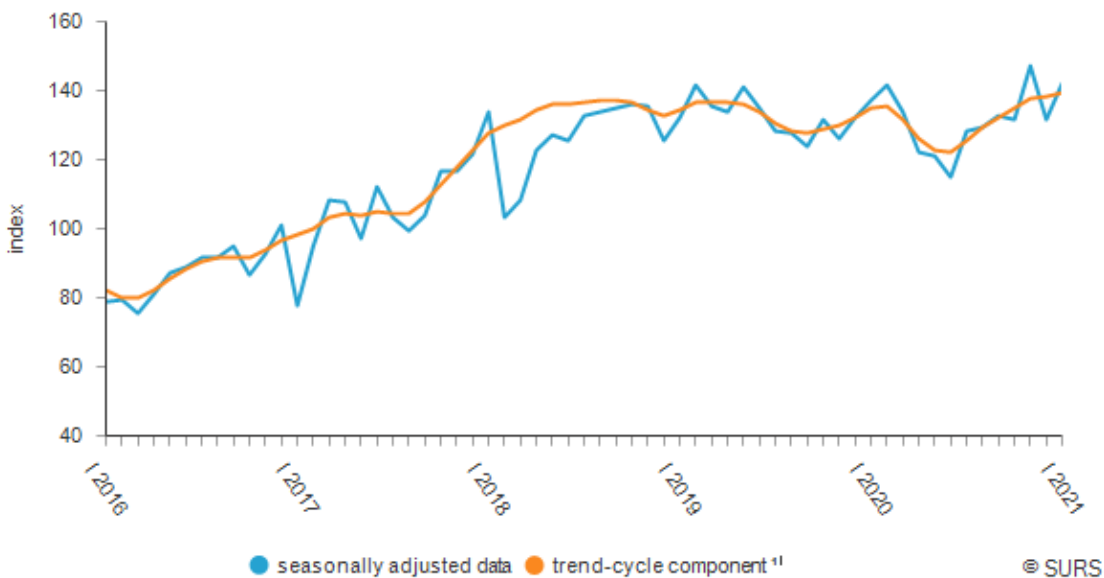
2019:

- 9 645 sole entrepreneurs
- 45 594 employees
- Gross average monthly salary: 1 318 eur
- Added value pr employee: 32 054 eur/employee
- 5,6 % GDP
- 2,5 billion eur added value created by construction industry (5,8 % of total added value created by Slovenian economy in year 2019)



Vir: Eurostat

- Real indices of the value of construction put in place, Slovenia (Ø2015=100)



1.1 What is the weight (in percentage) of SMEs in the construction sector in the country? (in 2019 d)

7 283 companies (12 large, 56 medium, 918 small, 6297 micro)

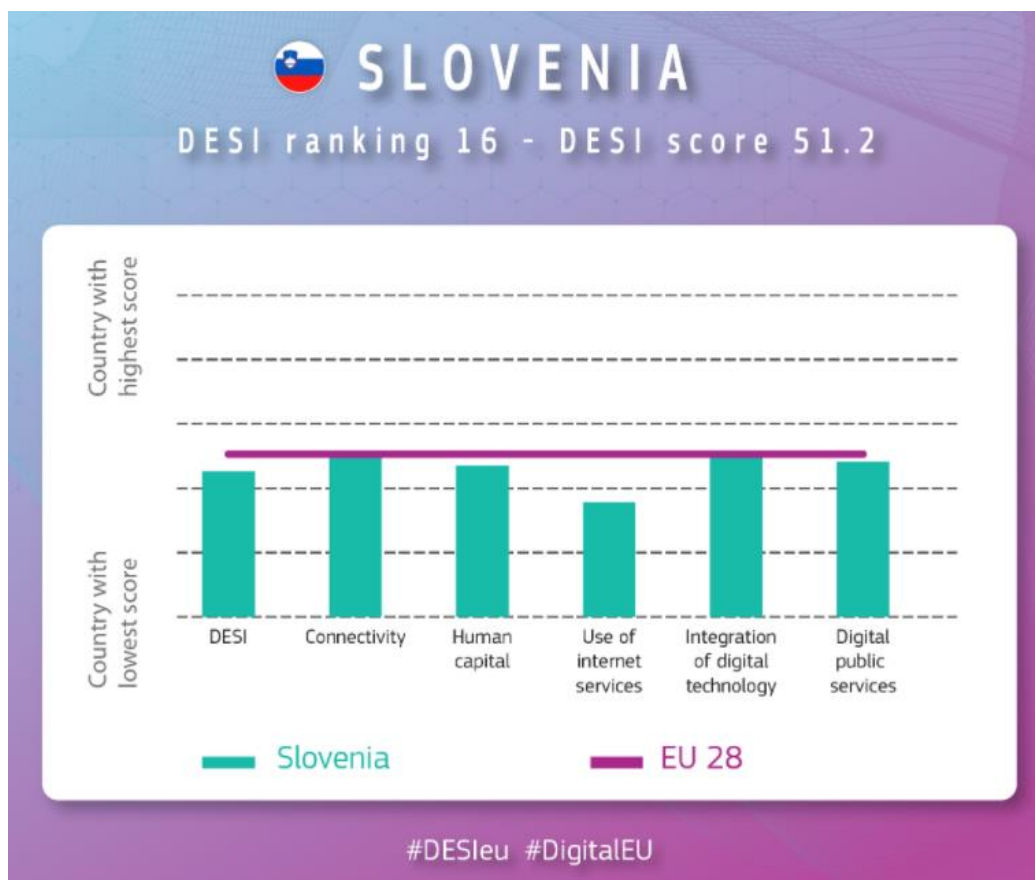
Note:

Small and medium-sized companies are companies with up to 250 employees, net sales revenues do not exceed EUR 40,000,000 or the value of assets, ie the company's assets, does not exceed EUR 20,000,000.

The definition of SMEs is uniformly applied at EU level in all policies, programs, measures and support to these companies. The number of employees, income and resources are usually used at EU level as the main criteria for determining the size of SMEs. However, EU statistical offices determine the size of companies according to the number of people working. Micro, small and medium-sized enterprises (SMEs) account for 99% of all enterprises in Slovenia. The same ratio applies throughout the EU.

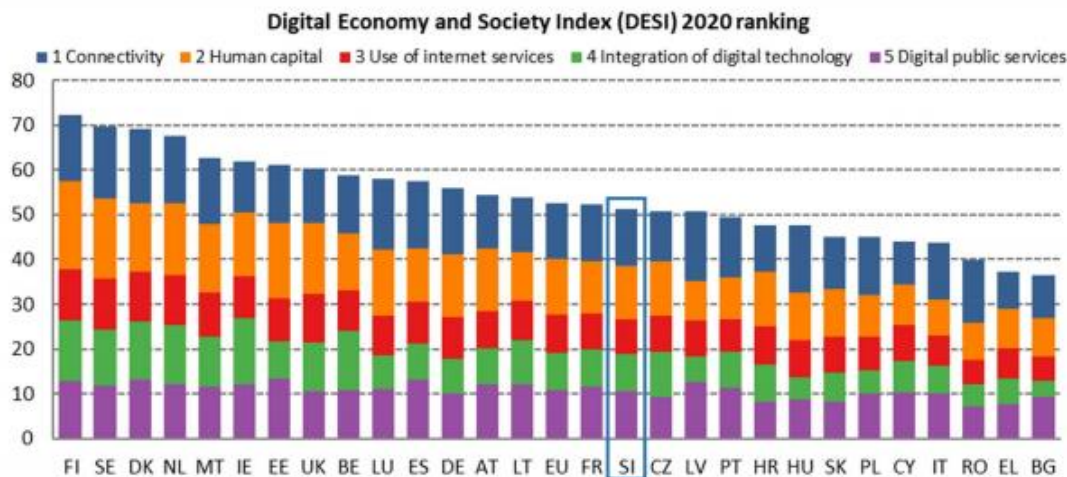
2 State of the digital economy in Slovenia.

- DESI index for Slovenia for year 2020:
<https://ec.europa.eu/digital-single-market/en/scoreboard/slovenia>



Digital Economy and Society Index (DESI) 2020 Slovenia: county profile:
https://ec.europa.eu/newsroom/dae/document.cfm?doc_id=66929

	Slovenia		EU
	rank	score	score
DESI 2020	16	51.2	52.6
DESI 2019	17	48.7	49.4
DESI 2018	16	45.9	46.5



Slovenia has improved and now ranks 16th out of 28 EU Member States in the Digital Economy and Society Index (DESI) 2020. Based on data prior to the pandemic, Slovenia has improved its score in all five dimensions, but advanced in ranking only in the integration of digital technology dimension. In the human capital dimension, the score has risen from 46.3 to 48.3 and is now close to the EU average score of 49.3. While the score in the use of internet also risen from 49.8 to 51.7, Slovenia continues to lag behind the EU average score of 58.0. While in the connectivity dimension, Slovenia has improved its score from 48.6 to 50.2 it is now just above the EU average score of 50.1 and has lost several ranks. Slovenia improved its score in the integration of digital technology from 39.1 to 40.9 and ranks now very close to the average EU score of 41.4. Slovenia improved the score in the digital public services dimension substantially from 64.5 to 70.8 just slightly below the EU average score of 72.0. Slovenia improved its' ranking in the digital public services dimension for one place. Slovenia is implementing the Digitalna Slovenija 2020 strategy(1) adopted in March 2016. Together with the Slovenian Industrial Policy (RISS - Research and Innovation Strategy of Slovenia and SIP), Digital Slovenia is one of the three key sectoral strategies with guidelines for the creation of an innovative knowledge society. The strategy covers all areas of life and development: public services, entrepreneurship, households and education. Slovenia is currently drafting an all-inclusive artificial intelligence strategy and updating the strategy Digital Slovenia. In November 2019, UNESCO decided that Slovenia should host the International Research Center for Artificial Intelligence at the Jožef Stefan Institute in Ljubljana(2) .

- Digitisation of enterprises with at least 10 persons employed: almost a third with very low digital intensity index

In 2020, 45% of enterprises with at least 10 persons employed have a low, 32% very low, 22% high and 1% very high digital intensity index.

The importance of digitization, i.e. connecting individual business processes in the enterprises – from paperless business, automation of processes to connecting systems and devices –, was emphasised during the epidemic as enterprises had to reshape their business, e.g. enable work from home or online sales of their products and services. Digitization is key to the competitiveness of Slovenian economy.

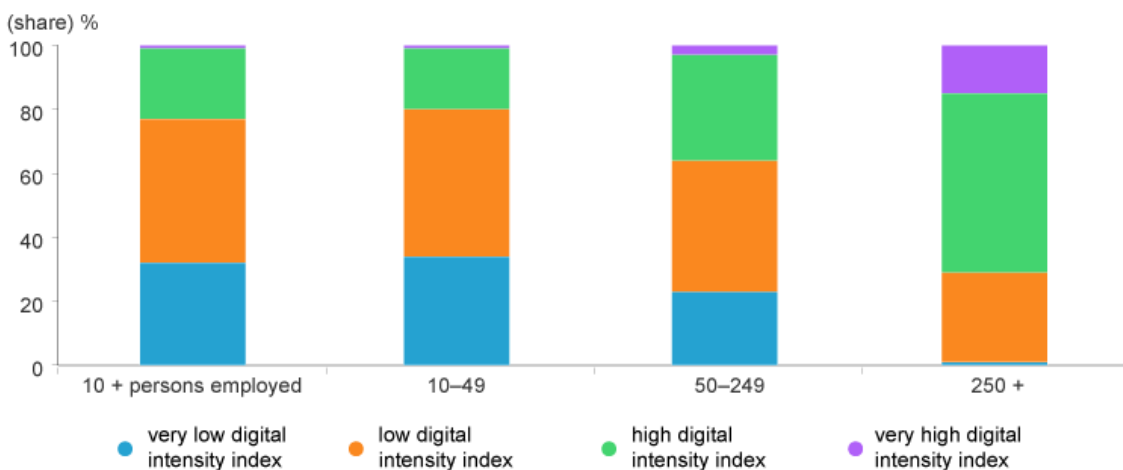
The rate of digitization of enterprises with at least 10 persons employed is monitored by the digital intensity index, which consists of 12 indicators used to monitor the use of ICT in enterprises in an individual year. According to the number of elements they meet, enterprises are classified into four groups: enterprises with a very low, low, high and very high digital intensity index.

Almost a third of enterprises with at least 10 persons employed with a very low digital index

In 2020, most enterprises with at least 10 persons employed have a low digital intensity index (45%); 32% of enterprises have a very low, 22% a high and 1% a very high digital intensity index.

As regards the enterprise size (number of persons employed), most of the small and medium-sized enterprises have a low digital intensity index (46% and 41%, respectively), while among large enterprises the majority have a high digital intensity index (56%).

Digital index in enterprises with at least 10 persons employed, Slovenia, 2020



Indicators for monitoring the digital intensity index in 2020: More than half of persons employed have access to the Internet for business purposes

In 46% of enterprises with at least 10 persons employed more than half of persons employed have access to the Internet for business purposes. As regards the enterprise size, 46% of small and medium-sized enterprises and 52% of large enterprises.

Enterprise employs ICT specialists

17% of enterprises employ ICT specialists: 10% of small, 38% of medium-sized and 84% of large enterprises.

In 2019, in 79% of enterprises information-communication functions were performed by external suppliers (e.g. maintaining ICT infrastructure, developing or providing support for software or web solutions, ICT security and data protection) and in 33% of enterprises by own employees (incl. those employed in parent or affiliate enterprises).

Maximum contracted download speed of the fastest fixed Internet connection is at least 30 Mbit/s

73% of enterprises with 10 or more persons employed have maximum contracted download speed of the fastest fixed Internet connection at least 30 Mbit/s.

Enterprise provides more than 20% of the persons employed with a portable device that allows a mobile connection to the Internet for business purposes

47% of enterprises provided more than a fifth of their persons employed with a portable device that allows a mobile connection to the Internet.

These portable devices were provided to 27% of persons employed.

Enterprise has a website

81% of enterprises with at least 10 persons employed are present on the Internet with either their own website or on the website of the mother enterprise: 78% of small, 93% of medium-sized and 99% of large enterprises.

Enterprise website provides at least one of the advanced functionalities

79% of enterprises provide one of the following functionalities on the website: provide description of goods or services, price lists on the website (79%), make it possible for visitors to customise or design online goods or services (6%), enable tracking the status of orders placed on the website (9%), and provide personalised content on the website for regular or recurrent visitors (5%).

Enterprise uses 3D printing

In 2019, 5% of enterprises used 3D printing: 3% of enterprises used their own 3D printers and 3% used 3D printing services provided by other enterprises.

Enterprise purchases medium or high cloud computing services

26% of enterprises purchase medium or high cloud computing services, i.e. at least one of the following services: hosting the enterprise database (14%), finance or accounting software applications (15%), customer relationship management (CRM) (8%) and computing power to run enterprise's own software (10%).

Enterprise was sending e-invoices in standard structure suitable for automated processing (e-invoices) in the previous year

In 2019, 58% of enterprises were sending invoices in standard structure suitable for automated processing (e-invoices) in the previous year.

Of all sent invoices (to private customers, other enterprises or public authorities), 34% of enterprises sent less than 10% as e-invoices, 10% at least 10% but less than 25%, 7% at least 25% but less than 50%, 4% at least 50% but less than 75% and 3% at least 75%.

Enterprise uses industrial or service robots

8% of enterprises with at least 10 persons employed use robots (industrial or service). 8% use industrial robots – automatically controlled, reprogrammable, multipurpose manipulator programmable in three or more axes (e.g. robots for welding, laser cutting, spray painting, etc.) – and 1% service robots – machines that have a degree of autonomy and are able to operate in complex and dynamic environment that may require interaction with persons, objects or other devices.

Robots are used by 15% of enterprises in manufacturing activities (15% industrial and 1% service robots) and by 2% of enterprises in service activities (1% industrial and 1% service robots).

Enterprise generated at least 1% of its turnover in the previous year via computer networks – with orders via websites or via electronic data interchange (EDI)

In 2019, 18% of enterprises generated at least 1% of their turnover with orders via computer networks (website or EDI-type messages).

Enterprises generated via computer networks 17.8% of their turnover (excluding VAT) in 2019; 4.6% via websites and 13.2% via EDI-type messages.

Enterprise analysed big data by employees in the enterprise or by other enterprises or organisations in the previous year

7% of enterprises with at least 10 persons employed analysed big data in 2019 (5% of small, 12% of medium-sized and 32% of large enterprises). 5% of enterprises analysed big data themselves and for 2% of enterprises big data were analysed by other enterprises or organisations.

Source: <https://www.stat.si/StatWeb/en/News/Index/9259>

3 An overview of the construction sector e-commerce market

3.1 Statistics about internet usage and online sales.

3.1.1 *The purposes of the Internet usage in enterprises with at least 10 persons employed*

Half of enterprises use social media, 46% use voice or video calls applications over the Internet and 27% pay for advertisements on the Internet.

The Internet is the basic element of the digital society that is changing how we carry out activities in private and business life. In the first quarter of 2019, 74% of persons in Slovenia aged 16–74 years used the Internet every day or almost every day. At the same time, the Internet is a strategic tool for increasing productivity, development of business models, etc., in enterprises.

More than half of persons employed use computers with access to the Internet for business purposes

99% of enterprises with 10 persons employed have access to the Internet. 52% of persons employed use computers, portable devices or smartphones with access to the Internet for business purposes. Regarding the enterprise size (number of persons employed), these devices with access to the Internet are used by 54% of persons employed in small enterprises, 49% in medium-sized enterprises and 53% in large enterprises. Regarding the enterprise activity, the share of usage among persons employed was 42% in manufacturing and 64% in service activities.

Besides access to the Internet, the speed of the Internet connection – the speed of data transfer – is also important. 45% of enterprises have a maximum contracted download speed of the fastest fixed Internet connection at least 30 Mbit/s (41% in 2018). 22% have the speed at least 30 but less than 100 Mbit/s (21% in 2018) and 22% at least 100 Mbit/s (19% in 2018).

83% of enterprises provided to the persons employed portable devices (e.g. portable or tablet computers, smartphones) that allow a mobile connection to the Internet using mobile telephone networks. These devices were provided to 25% of persons employed in enterprises with at least 10 persons employed (23% in 2018).

Almost half of enterprises use voice or video call applications over the Internet for business purposes

Internet accessibility, connectivity of devices to the Internet has made it possible to develop new online services that replace or supplement traditional services. These so-called OTT (over-the-top) services allow among other things voice or video calls via the Internet, instant messaging.

OTT services – voice or video call applications over the Internet for business purposes – are used by 46% of enterprises with at least 10 persons employed, e.g. Skype/Skype for business, Viber, FaceTime, WhatsApp/WhatsApp Business, WebEx. Regarding the enterprise size, these applications for telephoning or video telephoning over the Internet are used by 41% of small, 65% of medium-sized 79% of large enterprises.

Half of enterprises use social media; almost a quarter of enterprises have a profile on at least two social media

Social media are an important factor in marketing and enable enterprises to communicate directly with customers. Half of enterprises with at least 10 persons employed use social media (47% in 2017). Regarding the enterprise size, social media are used by 48% of small, 56% of medium-sized and 82% of large enterprises. 27% use only one social medium and 24% at least two social media.

49% of enterprises with at least 10 persons employed have a profile on social networks, e.g. Facebook, LinkedIn (45% in 2017), 23% on multimedia content sharing websites, e.g. YouTube, Instagram (17% in 2017), 8% their own blog or microblog, e.g. Twitter profile (7% in 2017), while 2% of enterprises use Wiki based knowledge sharing tools (which is the same as in 2017).

83% of enterprises with at least 10 persons employed that have a profile on social media used them for various purposes. 70% of enterprises used them for the purposes of advertisement, e.g. to develop enterprise image or to market goods or services, their launching, 45% for the communication with their customers, for obtaining or responding to customers opinions, reviews, questions, and 39% for recruitment of employees. 13% of enterprises involve in this way their customers in the development or innovation of goods or services they provide.

83% of enterprises are present on the Internet with a website (their own or they are presented on the website of their parent enterprise). 35% of enterprises have a link or references to the enterprise's social media profiles on the website.

29% of enterprises with websites use information about visitors' behaviour on their websites, e.g. clicks, items viewed, for example for advertising or improving customer

satisfaction. This information is used by 27% of small, 35% of medium-sized and 52% of large enterprises with a website.

More than a quarter of enterprises pay for advertisements on the Internet

For the enterprises it is important to adjust their advertisements in the digital world so that they can reach their customers at the right time. 27% of enterprises with 10 or more persons employed pay for advertisements on the Internet, e.g. adverts on search engines, on social media, e.g. Facebook, Google, YouTube, or on other websites, etc. (22% in 2018). Advertisements on the Internet were paid by 26% of small, 28% of medium-sized and 41% of large enterprises.

92% of enterprises that pay for advertisements on the Internet use the targeted advertising method based on website content or keywords searched by users (contextual advertising); 28% use the method based on the tracking of Internet users' past activities or profile (behaviour advertising), 27% geo advertisements based on the geolocation of Internet users and 5% other methods of targeted advertising.

Detailed data for 2019 available in the SiStat Database

With the usage of the Internet, the digitalization of business, it is crucial to ensure secure usage of ICT in enterprises. Detailed data [on the secure usage of ICT, usage of social media, electronic sharing of the information within the enterprises, e-commerce in enterprises](#), etc., are available in the SiStat Database.

Digitalisation in enterprises with at least 10 persons employed, Slovenia, 2019



Source: SURS

© SURS

Source: <https://www.stat.si/StatWeb/News/Index/8541>

3.2 E-commerce Regulation in each partner country (Data Protection policies, Consumer Rights...)

GDPR in place for Data protection

3.3 How do most companies use e-commerce and for what kind of services?

See again upper statistical news: <https://www.stat.si/StatWeb/News/Index/8541> .

We do not have a more detailed sectoral analysis of e-commerce.

3.4 what services do they sell online? (products, services for construction/rehabilitation such as local work, design, consulting and diagnostic services...)

Companies sell online mostly products.

However there are some construction companies example, who offer:

- online calculation for concrete works or asphalt works built in: <https://www.cgp.si/Prodaja-materialov/Kalkulator>
- building material industry: calculation for brick needed for a wall <https://www.wienerberger.si/orodja-in-tehnicna-podpora/online-orodja-za-zid/kalkulatorji.html>
- some web site for masters offer a tool via which you can acquire offers for construction works (single house range) from more providers https://www.mojmojster.net/cene/gradbena_dela

and some trials for calculation of materials for single family house from foreign provider (form Russia, with bad translation...):

<https://sl.skopelitissa.com/online-kalkulator-izracun-gradbenih-materialov-za-gradnjo-doma> & <https://sl.skopelitissa.com/kalkulator-na-spletu-izracun-materiala-za-gradnjo> & <https://abalusoft.ru/sl/calculation-of-the-cost-of-construction-works-online-the-best-construction-programs.html>

3.5 How dynamic and interactive are the websites from most companies? (Try to give a perspective of the best and the worst that you can find at the moment)

We do not have these data for construction companies in Slovenia. We have some large companies who have and excellent web site (<https://www.pomgrad.si/> , <https://www.cgp.si/> , , whereas SME not so much, they are not interactive.

3.6 What kind of software and technology is mostly used? (cite for each process one 1. Trading, 2. Contracting 3. Payment 4. Delivery + Supporting processes: 1. Communication 2. Promotion 3. Overall Service).

We do not have these data, we have never done such analyses, those are hidden data, companies would not share it as well as provider also not.

3.7 What is the weight of the international sales?

2019: 16,6 % (8,5 % more than in year 2018)

4 E-commerce main barriers for the SMEs of the construction sector

4.1 How complex is it to start an e-Business? (apart from Its tools/solution providers is there enough information and training available on this topic?)

E INVOCIING IS NOW A STANDARD TO WORK WITH PUBLIC SERVICES/AUTHORITIES

4.2 Is there enough information and training available on this topic?

Partly, there are also national grants for companies to become more digitised.

4.3 What are the reservations or concerns that prevent entrepreneurs from adopting new behaviours and using new tools regarding e-commerce? (What are the reservations or concerns that prevent entrepreneurs from adopting new behaviours and using new tools regarding e-commerce?)

It depends on how company is transparent, grey economy in the private sector is still a problem.

More digitized process means more transparency and more funds to apply such system and get trained all the staff. Bigger MSP are getting more and more aware how e-commerce

4.4 Is the security of online transactions still a concern? (Is the security of online process till a concern? What kind of impact it can have for your business?)

4.5 What are potential disadvantages of e-commerce in the construction sector when compared to other sectors and how might they be surpassed?

It is very easy to establish e-commerce platform/e-store, as there are many available and also many providers of such platforms. So there is a lot of experience available, also probably trainings (generally e-stores are here for a long time...). There are also standards for B2B e-business for e-Invoices, e-Order, e-Delivery documents (all information available on epos.si in Slovene language).

Chamber of commerce and industry has department for ICT companies:

It has holds very informative web site:
https://www.gzs.si/zdruzenje_za_informatiko_in_telekomunikacije covering different ICT companies activities

SOEK Operaterji elektronskih komunikacij	SeKV Kibernetska varnost	ZITex Izvozne iniciative
S3P Ponudniki programske opreme	ScienceTech Povezovanje visokotehnoških podjetij	SeGov Sodelovanje z državno in javno upravo

They promote all digital in Slovenian companies with initiative GO DIGITAL:
https://www.gzs.si/zdruzenje_za_informatiko_in_telekomunikacije/vsebina/GO-DIGITAL, offering man webinar, advices, surveys etc.

They are also involved in many cross sectoral ICT projects such as, one of those is Center za -poslovanje (engl: Center for e-commerce): <https://epos.si/projekt-rose-2> with focus on e-invoicing and developing special standardized documents

IKT horizontalna mreža	Digital Innovation Hub Slovenia	Cyber - Interreg Europe
Center za e-Poslovanje	eZdravstvo	AI4Slovenia

5 National initiatives and incentives for digitization and more specifically for e-commerce

- SPS subsidies for the digital transformation of companies, regardless of industry
<https://podjetniskisklad.si/sl/produkti-sklada/program-mladi/posebne-spodbude/spodbude-za-digitalno-transformacijo-msp-p4d-2019-2023>
- Vouchers for digital strategies, digital competence, websites / online sales, cyber security <https://podjetniskisklad.si/sl/razpisi?view=tender&id=119>

6 Training courses currently available in the country to support e-commerce in the construction sector

1. Organization: Higher Education Institute (HEI), Secondary education/High school/Technological college, Vocational Education Training (VET), Adult Education Provider, Other (please
2. Course title:
3. Web link of the course:
4. Duration in hours:
5. Target group:
6. Status: Non-Profit / For profit, Private / Public

Specific annual event (webinar) organized by business newspaper: Finance on topic how digitalized are Slovenian construction companies: <https://oe.finance.si/8967853/Kateri-so-najvecji-izzivi-digitalizacije-gradbenistva-v-Sloveniji>

DIGIT AGENDA event organized by Chamber of commerce and industry of Slovenia: DigitAgenda 2016 includes key recommendations on how to raise the average productivity growth in the Slovenian economy to 3% by 2025 and create 10,000 new digital jobs by 2025. The Chamber of Commerce and Industry prepared it with the participation of some businessmen within four working groups.

By 2020, 90% of jobs will be dictated by knowledge of information technology. We, individuals as well as companies and society, are still insufficiently prepared for this. The latest survey by counseling house A.T. Kearney confirms that companies do not yet perceive digitalization as a means to achieve sales growth. Only 32% of Slovenian companies want to accelerate their digital transition with an external partner, which is significantly less than the average developed countries in the region of Europe, Africa and the Middle East (EMEA: 78%). Only 25% of companies have a written digital strategy (EMEA developed markets: 45%).

In addition to the 5 general recommendations, DigitAgenda 2016 includes specific recommendations for four individual areas: infrastructure digitization, industry digitization, service digitization, and digital regulation.

We are not aware of other courses, perhaps provider contact construction company directly and offer them testing trial of their ICT tool.

In Slovenia digitalization of construction sector (construction companies) is very much related with their core service, which is related to BIM. So BIM stands as a keyword for adoption of digitalization in Slovenia. Of course, companies are aware BIM needs also other IT processes being established prior to BIM (data bases, E-administration, e-communication, hardware different installed and staff trained, ...)

7 Aspects to be improved – importance of training: list national strategy, sectoral papers / manifestos.

Digitalization is important process for export companies to compete on national market e-commerce is probably obligatory, for large system this is inevitable requirement!

For SME construction companies we have to convince them which advantages can e-commerce bring, how much resources actually need changed business models or business model supported with e-commerce. However in next years stricter competition will force remaining SME to get digitalized or to stop their business. For craftsmen this is not so much important as it is for construction industry (bigger projects and more staff being employed).

Education attainment in the construction sector is also an important factor for adoption of e-commerce:

Persons in employment (NACE Rev. 2) by ACTIVITY, YEAR, EDUCATIONAL ATTAINMENT and SEX

	2020				
	Educational attainment - TOTAL	Basic or less	Upper secondary	Tertiary	Unknown
	Sex - TOTAL	Sex - TOTAL	Sex - TOTAL	Sex - TOTAL	Sex - TOTAL
F CONSTRUCTION	66,130	11,854	47,722	6,554	-

<https://pxweb.stat.si/SiStatData/pxweb/en/Data/-/0764701S.px/table/tableViewLayout2/>

Employees citizenship and language skill are also related to e-commerce, especially for MSP , since 40 % of employees in construction sector are foreigners (from third countries):

Persons in employment (excluding farmers, NACE Rev. 2) by SEX, ACTIVITY, YEAR and GROUP OF CITIZENSHIP

		2020				
		1 Persons in employment - TOTAL	11 Citizens of Slovenia - TOTAL	12 Foreign citizens - TOTAL	121 Citizens of EU Member States	122 Citizens of other countries
Sex - TOTAL	F CONSTRUCTION	64,914	37,508	27,406	1,911	25,495

<https://pxweb.stat.si/SiStatData/pxweb/en/Data/-/0775325S.px/table/tableViewLayout2/>

We agree fully that is a great potential for digital future of the construction industry:

https://issuu.com/cdtm/docs/trend_report_fall_2018_fullversion

We have to address EU sector as is proposed in this presentation (report on EU level) Strengthening Leadership in digital technologies and in digital industrial platforms across Value Chains in all sectors of the Economy The role of the Construction chain

https://ec.europa.eu/futurium/en/system/files/ged/fercostruzioni_wg2_04052017-1.pdf

Please consider also factsheet valid fr Slovenian MSP:

https://www.gov.si/assets/ministrstva/MGRT/Dokumenti/DIPT/Podjetnistvo/Dokumenti/Slovenia-SBA-Fact-Sheet-2019_dostopno-za-ranljive-skupine.pdf