

Survey on ICT and E-commerce Use in Companies 2006/07
Provisional results

95.2% of Spanish companies with 10 or more employees and an Internet connection access the Internet via broadband

The purchase of goods and services via e-commerce registers an interannual growth of 40%

One in five companies with fewer than 10 employees has a website

94.3% of Spanish companies with 10 or more employees had an Internet connection, according to the Survey on the Use of Information and Communication Technologies (ICT) and Electronic Commerce in Companies.

The use of computers was widespread among almost all Spanish companies with 10 or more employees (98.1%). In turn, 70.9% had implemented a Local Area Network (LAN), and 13.5% had Extranet.

Regarding electronic communications, **92.4% of companies had email and 92.9% were equipped with mobile phones.**

51.9% of companies had a website or webpage. In the group comprising those with 250 or more employees, 87% stated that they had a website, representing an increase of more than four points as compared with the previous period.

Percentage distribution of the use of ICT products by company size

	Total	10 to 49	50 to 249	250 or more
Computers	98,1	97,8	99,7	99,9
Local Area Network	70,9	67,9	87,7	97,1
Wireless local area network	19,3	16,8	31,1	56,5
Internet connection	94,3	93,5	99,0	99,7
Intranet connection	26,6	22,4	46,8	79,9
Extranet connection	13,5	10,6	26,7	55,7
Mobile Telephony	92,9	92,3	96,4	98,8
Email	92,4	91,3	98,6	99,5
Internet connection and website/webpage	51,9	48,6	67,9	87,0

Regarding the setting up of e-commerce systems, 12.5% of companies stated that they used ERP IT tools (Planning of Business Resources) for sharing information electronically among

different areas. Conversely, 20.7% had CRM (Client Relationship Management) applications for handling information on clients.

On the other hand, **12.3% of companies used teleworking**, that is, they had employees who regularly worked off-site (at least part-time, one day per week), and that they connected to their ICT systems via external telematic networks. This figure represented an interannual increase of 13.7%.

Companies in Madrid, Cataluña, País Vasco and Navarra use ICT the most

By Autonomous Community, companies located in Comunidad de Madrid, Cataluña, País Vasco and Comunidad Foral de Navarra showed the greatest use of ICT.

Conversely, companies in Castilla-La Mancha, Extremadura, Región de Murcia and Andalucía had the lowest percentages of use of new technologies.

Use of the different ICTs by Autonomous Community in which the company headquarters are located, as a percentage

	Computer	Local Area Network	Wireless LAN	Internet	Intranet
14 Andalucía	96,9	66,2	16,3	91,5	18,7
4 Aragón	98,0	69,6	17,0	94,0	27,8
6 Asturias (Principado de)	97,4	67,4	19,3	94,0	28,7
7 Balears (Illes)	99,8	63,8	18,1	95,3	23,8
11 Canarias	99,0	67,9	17,6	98,3	23,3
12 Cantabria	98,6	63,5	16,5	93,8	21,7
13 Castilla y León	98,3	64,9	13,2	94,0	22,1
17 Castilla-La Mancha	94,7	60,0	17,1	89,3	18,4
1 Cataluña	98,6	77,4	21,8	96,4	35,6
8 Comunitat Valenciana	98,8	70,5	16,1	93,2	22,6
16 Extremadura	99,3	55,5	15,5	95,6	15,1
10 Galicia	96,7	66,8	19,1	90,2	22,6
Madrid (Comunidad de)	98,8	80,9	27,0	96,5	32,7
15 Murcia (Región de)	97,1	63,8	18,6	90,8	19,2
3 Navarra (Comunidad Foral de)	99,7	71,6	16,0	98,4	28,0
2 País Vasco	98,5	67,7	18,0	96,7	31,2
9 Rioja (La)	97,1	65,8	14,6	92,7	24,1

95.2% of Spanish companies with an Internet connection access the Internet via broadband

95.2% of Spanish companies with an Internet connection accessed the Internet via a broadband solution. Among these companies, the technology used the most was a connection via XDSL solutions.

Connection type:	Total	10 to 49	50 to 249	250 or more
Modem	16,9	17,3	13,9	17,9
RDSI	19,3	18,7	21,5	26,6
Broadband:	95,2	94,6	98,5	99,6
- XDSL (ADSL, SDSL,...)	92,4	92,4	93,0	88,6
- Other fixed connections (Cable, LMDS,...)	7,6	5,2	17,0	49,2
Mobile telephony (GSM, GPRS, UMTS,...)	24,7	21,7	37,9	64,2

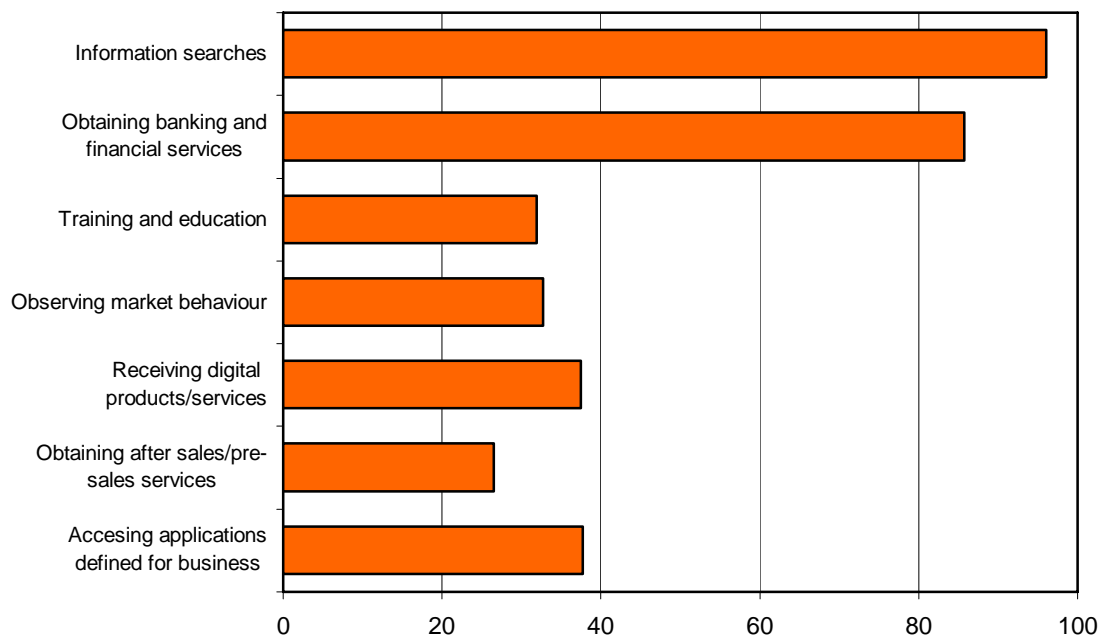
Companies with an Internet connection by connection-type, as a percentage

38% of companies stated that the maximum download speed for their best Internet connections was over 2 Mb/sec, representing an increase of more than 25% as compared with the previous period.

Internet use

Most companies used the web to search for information (96.1%), to obtain banking and financial services (85.8%), to access applications defined for their business (37.7%) and to receive products or digital services (37.5%).

Internet service use, as a percentage



Conversely, **61.7% of companies interacted with Public Administrations via the Internet.**

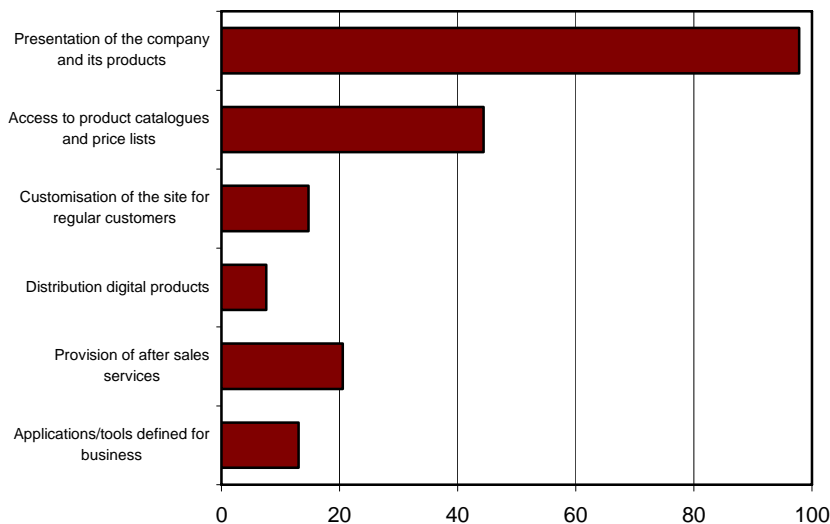
The main objectives were to obtain information from the websites of Public Administrations (56.1%), to download forms (56.7%) and to send completed forms (40.1%).

More than half of companies with an Internet connection have a website

51.9% of Spanish companies with an Internet connection had a website, representing an increase of more than one point.

Companies used their website, mainly to introduce the company and its products (97.8%) and to enable access to catalogues and price lists (44.4%).

Website usage, as a percentage



The most frequently-used security services by companies with Internet connections were protection software or virus checks (97%), firewalls (71%) and data backups (61.7%). 82.4% of companies stated that they had updated their security services in the last three months.

15.9% of companies stated that they had had a security problem in the last 12 months, this percentage being almost four points lower than that registered in the previous period. The main problem relating to security was caused by computer viruses (14.9%).

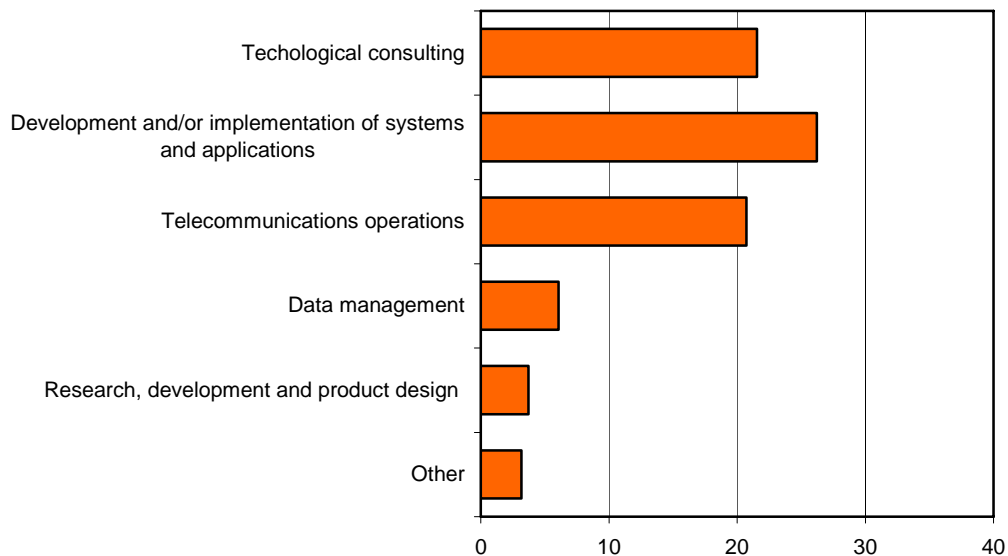
ICT specialisation within the company

12.1% of companies employed specialist ICT staff. Of the 4.5% of companies which hired or attempted to hire new ICT specialist staff, more than half stated that they had experienced difficulty in doing so. Most common of these were the scarcity of candidates with the profile required (46.5%) and lack of work experience in the ICT field (33.6%).

Conversely, 9.3% of companies provided training activities in order to develop or improve ICT knowledge by their employees. The percentage of staff receiving ICT training reached 22.3%.

Regarding outsourcing of functions relating to the intensive use of information technology, 31.2% of companies subcontracted a service requiring ICT specialists. The functions most sought after were the development and setting up of systems and applications (26.2%) and technological consultancy (21.5%). 2% of companies subcontracted one of these functions from abroad.

Outsourced ICT functions in 2006, as a percentage



E-Commerce

8.8% of companies made sales via e-commerce (via the Internet or other telematic networks). Turnover generated by these sales reached 126,909 million euros, for an interannual increase of 32.7%.

The branch of activity with the highest percentage of companies which made sales via e-commerce was *Hotels and camp sites* (62.9%).

Sales via e-commerce represented 8.7% of total sales for companies using this channel, 30.6% more than in the previous period.

The activity group showing the highest proportion of sales by e-commerce on its sales total was *Manufacture of coke oven products, petroleum refinement; chemicals; rubber and plastic products and plastic materials* (18.2%).

19.3% of companies make purchases via e-commerce

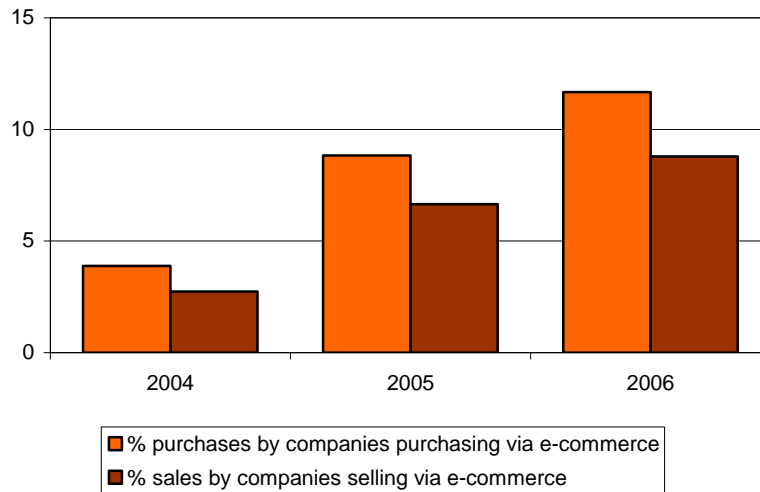
19.3% of companies made purchases via telematic networks, representing an interannual increase of 11.3%. The total volume of orders made for goods and services via e-commerce registered a 40% increase and reached 119,985 million euros.

The branch of activity with the highest percentage of companies which made purchases via e-commerce was *Computer activities* (65.4%).

In turn, purchases via e-commerce represented 11.7% of the total orders for companies using this channel. This figure represented an interannual increase of 32.1%.

The activity group with the highest proportion of purchases via e-commerce on the purchase total was *Retail commerce* (43.3%).

Evolution of the use of e-commerce



7.8% of companies sell via the Internet

7.8% of companies made sales via telematic networks, including sales made via the EDI system. Turnover generated by sales via the Internet was 75,823 million euros, for an interannual increase of 32.9%.

88% of these sales were to companies (the so-called Business to Business, B2B). Conversely, the percentage of sales to end consumers (Business to Consumer, B2C) was 11.3% and sales via the Internet to Public Administration (Business to Government, B2G) the remaining 0.7%.

In geographical terms, 86.9% of sales were to Spain, while sales to other EU countries represented 7.2% of the total. Sales via the Internet to other countries outside the EU represented the remaining 5.9%.

Among the reasons cited by companies as relevant to selling via the Internet, those that stood out were keeping pace with competitors (49.2%), acceleration of the business process (47%), improving the image of the company (47%) and access to new customers (43.5%).

Conversely, **18.2% of companies made purchases via the Internet**, including orders made via the EDI system. The total volume of purchases made via the Internet was 74,953 million euros, 64.4% greater than the previous year.

Use of ICT in companies with fewer than 10 employees

Although notable differences are still observable with regard to the population of medium-sized and large companies, the results referring to the population of companies with fewer than 10 employees reveal a maintained rising trend, both in infrastructure and in the use of ICT.

Thus, **61.2% of companies with fewer than 10 employees had computers** and 22.2% had a Local Area Network (LAN) installed.

Regarding Internet use, 48% of small companies had Internet access, which indicated an interannual increase of 7%. 90.3% of Spanish companies with an Internet connection accessed the Internet via a broadband solution, an increase of 4.6% as compared with the previous period.

44.1% used e-commerce, whilst the percentage of companies with fewer than 10 employees which used mobile phones reached 69.6%.

Regarding online presence, **20.8% of Spanish companies with an Internet connection had a website**, representing an increase of 14.9% as compared with the previous year.

ICT infrastructure of companies with fewer than 10 employees, as a percentage

	ene-06	ene-07
Computers	60,6	61,2
Local Area Network (LAN)	18,6	22,2
Internet connection	44,8	48,0
Internet connection via broadband (% on total of companies with an Internet connection)	86,3	90,3
Mobile telephony	69,5	69,6
E-commerce	42,0	44,1
Internet connection and website	18,1	20,8

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Methodology Annex

The Survey on ICT and Electronic Commerce Use in Companies is a survey integrated in the EU statistical plans to quantify the Information Society. It is governed by European Parliament and Council Regulation No. 808/2004 for carrying out statistics on the Information Society. The purpose of this statistical operation is to obtain the information necessary to measure the use of ICTs and Electronic Commerce by companies in the Member States and thus provide a response to the comparative eEurope2005 and i2010 indicators as regards the business sector.

The Survey was carried out by the National Statistics Institute (INE), in cooperation with the Statistics Institute of Navarra (IEN). Likewise, the INE has signed a cooperation agreement with the Fundación Centro Tecnológico de la Información y Comunicación (Information and Communication Technologies Foundation Centre - CTIC) in Principado de Asturias.

In addition, on a national level, there is a cooperation agreement with the Ministry of Industry, Tourism and Trade, through Public Business Entity Red.es, for the statistical measurement of the penetration of ICT and Electronic Commerce in the Spanish business network.

Following the methodological recommendations of the Statistical Office of the European Communities (Eurostat), the Survey considers a double time scope; the variables on ICT use refer to January 2007, whereas the reference period for electronic commerce and e-skills (level and demand for ICT knowledge) is the year 2006.

This study was aimed at 16,871 companies with 10 employees or more, and 11,950 companies with fewer than 10 employees, in the national territory and belonging to sections D, E, F, G, H, I, J, and K and groups 92.1 and 92.2 of section O, according to the National Classification of Economic Activities 93 (NCEA-93).

The sample was designed to offer results by branch of economic activity and by Autonomous Community. Due to a noteworthy increase in the sample for companies with fewer than 10 employees, as of last year, the Survey offers regional results for this group.

For the purpose of facilitating comparability with the European data, the aggregated results have been calculated without considering the companies belonging to the financial sector. Following the European guidelines, this sector is studied by means of a specific questionnaire and the results are published separately.

As regards Electronic Commerce, it is considered as is any transaction carried out through telematic networks. Goods and services are procured via these networks, but the payment or dispatch of the good or service may be performed using this channel or others.

For the purpose of harmonising the national results with the aggregated European results, Electronic Commerce is measured considering the type of network over which the transaction is carried out (Internet or other telematic networks), independently of the system used.