

Survey on ICT and Electronic Commerce Use in Companies
Year 2013 – First quarter 2014

Main results

- 98.3% of Spanish companies with 10 or more employees have Internet access in the first quarter 2014. Seven out of 10 of them have a website.
- The percentage of companies with 10 or more employees using mobile broadband rises four points, standing at 78.3%.
- 91.1% of companies with 10 or more employees interact online with the Public Administrations in 2013.
- The turnover created in companies with 10 or more employees due to electronic commerce reached 15.1% of the total sales in 2013, that is, 6.7% higher than in 2012.

98.3% of Spanish companies with 10 or more employees had an Internet connection in the first quarter 2014. Moreover, the use of computers has expanded to almost the entirety of these companies (99.2%). In turn, 87.3% had a Local Area Network (LAN) installed, and 61.9% had a Wireless Local Area Network

95.3% of companies were set up with mobile phones.

On the other hand, 75.8% of companies with Internet access had a website. In those with 250 or more employees, this percentage reached 95.7%.

Use of ICT infrastructures by company size

Percentage over the total number of companies with 10 or more employees

First Quarter 2014	Number of employees			
	TOTAL	10 to 49	50 to 249	250 or more
% of companies with				
-Computers	99.2	99.1	99.5	99.8
-Local Area Network	87.3	85.9	95.0	97.7
-Wireless Local Area Network	61.9	59.5	74.2	81.1
-Internet connection	98.3	98.2	99.1	99.8
-Mobile telephony	95.3	94.8	97.8	99.4
-Other technologies (for example, GPS, TPV, etc.)	38.0	37.5	39.5	47.0
% of companies with an Internet connection and website ⁽¹⁾	75.8	73.4	87.5	95.7
% of companies that provide their employees with portable devices that allow a mobile connection to the Internet for business purposes ⁽¹⁾	54.6	50.1	77.2	90.3

⁽¹⁾Percentage over the total number of companies with an Internet connection

54.6% of companies issued their employees with portable devices, enabling connection to the internet for company use. 36.4% of these were laptop computers, and 49% were smartphones or PDA phones.

Employment and ICT training

25.1% of companies hired ICT experts and 11.1% hired new experts in 2013.

In turn, 22.9% of companies invested in ICT training in 2013. For companies with 250 or more employees, this figure reached 59.8%, that is, six points over that of the last year.

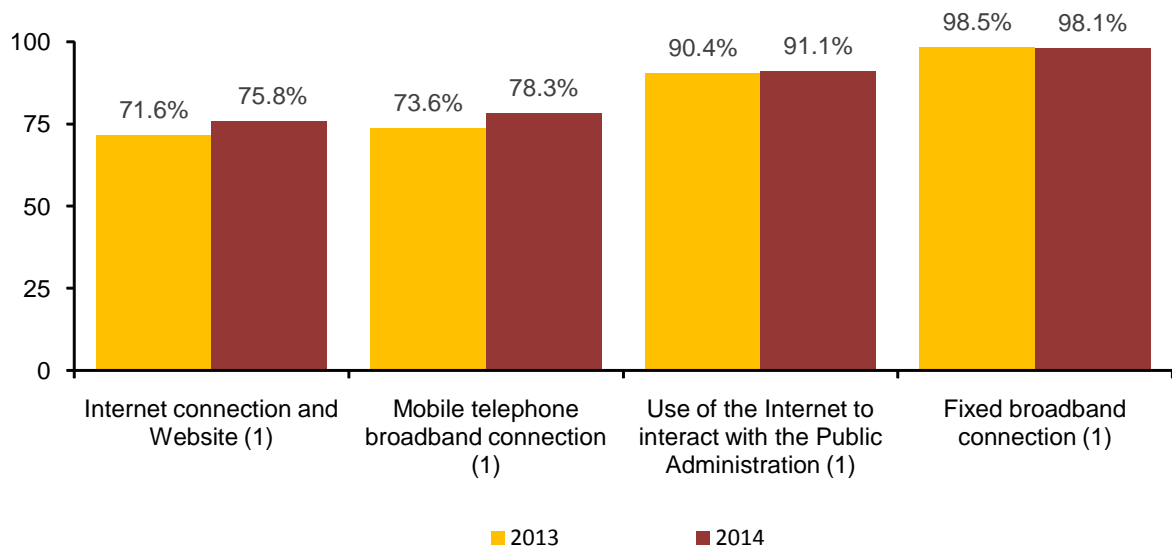
Evolution of ICT use in companies with more than 10 employees

ICT use in companies with more than 10 employees had an uneven behaviour between the first quarter 2013 and the same period of 2014.

On the one hand, an increase of nearly four points in the use of mobile broadband and in the possession of a website can be observed. On the other hand, the growth was slighter regarding ICT use for interacting with Public Administrations (from 90.4% to 91.1%).

Lastly, a slight decrease in the use of fixed broadband was registered.

Evolution of the use of ICT in companies larger than 10 employees



(1) Percentage over the total number of companies with an Internet connection

Types of Internet connection

99.9% of companies with 10 or more employees with an Internet connection accessed it via a broadband solution (fixed or mobile). The technologies used the most were access via DSL solutions (90.4%) and 3G or 4G mobile phones (74.2%).

Companies with an Internet connection by type of that connection

Percentage out of the total number of companies having 10 or more employees and an Internet connection

First Quarter 2014	Number of employees			
	TOTAL	10 to 49	50 to 249	250 or more
Broadband (fixed or mobile)	99.9	99.8	100.0	100.0
Fixed broadband connection	98.1	97.9	99.1	99.7
-DSL (ADSL,SDSL,...)	90.4	91.0	87.0	87.9
-Networks Cable and fiber optic (FTTH)	21.1	17.0	38.6	67.4
-Other fixed connections (PLC, leased line, satellite)	5.4	3.7	11.7	28.7
Mobile telephone broadband connection:	78.3	76.1	89.8	95.3
-By means of 3G or 4G modem	55.0	51.1	73.7	88.6
-By means of Mobile 3G or 4G	74.2	71.7	86.4	92.4
Other mobile connections (GPRS, EDGE, etc.)	23.7	21.0	35.8	50.6

Website availability and use

The main services offered by companies with 10 or more employees via their website were *company introduction* (90.5%), *privacy policy statement or certification related to website security* (65.2%) and *access to catalogues and price lists* (52.8%).

Services available on the website

Percentage over the total number of companies with 10 or more employees and an Internet connection

First Quarter 2014	
Company introduction	90.5
Privacy policy statement or certification related to website security	65.2
Access to product catalogues or price lists	52.8
Links or references to the social media profiles of the company	34.7
Possibility of electronic submission of complaint forms	26.4
Posting vacancies or receiving online job applications	21.1
Ordering or booking online	16.9
Online order tracking	11.1
Website customisation for regular users	8.4
Possibility of customers customising or designing products	7.38

Seven out of 10 companies used digital signatures in some communication with external agents. Of these, 98.4% used them to deal with the Public Administrations, and 17.2% to do so with suppliers and clients.

In the year 2013, 91.1% of companies interacted with the Public Administrations via the Internet. The main objectives were *obtaining information from the websites of the Public Administrations* (80%), *downloading of forms* (78.2%), and *filling tax forms by means of a full electronic management* (76.6%).

Use of social media by companies with 10 or more employees

36.9% of companies used any *social media* due to work issues.

Among them, 92.4% used *social networks* (Facebook, LinkedIn, Tuenti, Google+, Viadeo, Yammer, ...), 40.9% used *company blogs or microblogs* (Twitter, Present-ly, Blogger, Typepad etc.), and 39.6% did so with *websites that share multimedia content* (Youtube, Flickr, Picassa, SlideShare, Instagram,...).

The social media least used were *Wiki-based tools for sharing knowledge* (website whose pages may be edited by multiple volunteers via a web browser), representing 12.9%.

The main uses of social media were aimed towards *marketing, advertising and image management* (72.1%) and as a *user information channel* (56.8%).

Out of the total number of companies, 87.3% stated that *social media* was useful, to a higher or lesser extent, for the development of their business.

Use of Cloud Computing solutions by companies with 10 or more employees

At the beginning of 2014, 15% of companies used Cloud Computing solutions. Those used the most were *information storage* (69%), *e-mail service* (61.4%) and *company database server* (54.7%).

53.4% of the companies that used Cloud Computing did so by paying any service existing in servers of shared services suppliers.

The main reasons that limited the companies using this service were the uncertainty about laws (32.3%), the risk of corporate security holes (31%) and the high price of Cloud Computing services (27.8%).

The companies that did not use this service stated that they did not do so since their knowledge of this type of technology was not very advanced (46.5%) and/or it was not necessary for developing their business (45.9%).

ICT use by Autonomous Community

Companies with 10 or more employees whose headquarters are located in Cataluña, Comunidad de Madrid and Principado de Asturias presented the greatest intensities in their use of ICT in the first quarter 2014 (*).

Conversely, those companies in the Autonomous Cities of Ceuta and Melilla and those companies in the Autonomous Communities of Extremadura and Castilla-La Mancha had the lowest percentages of use of information technologies.

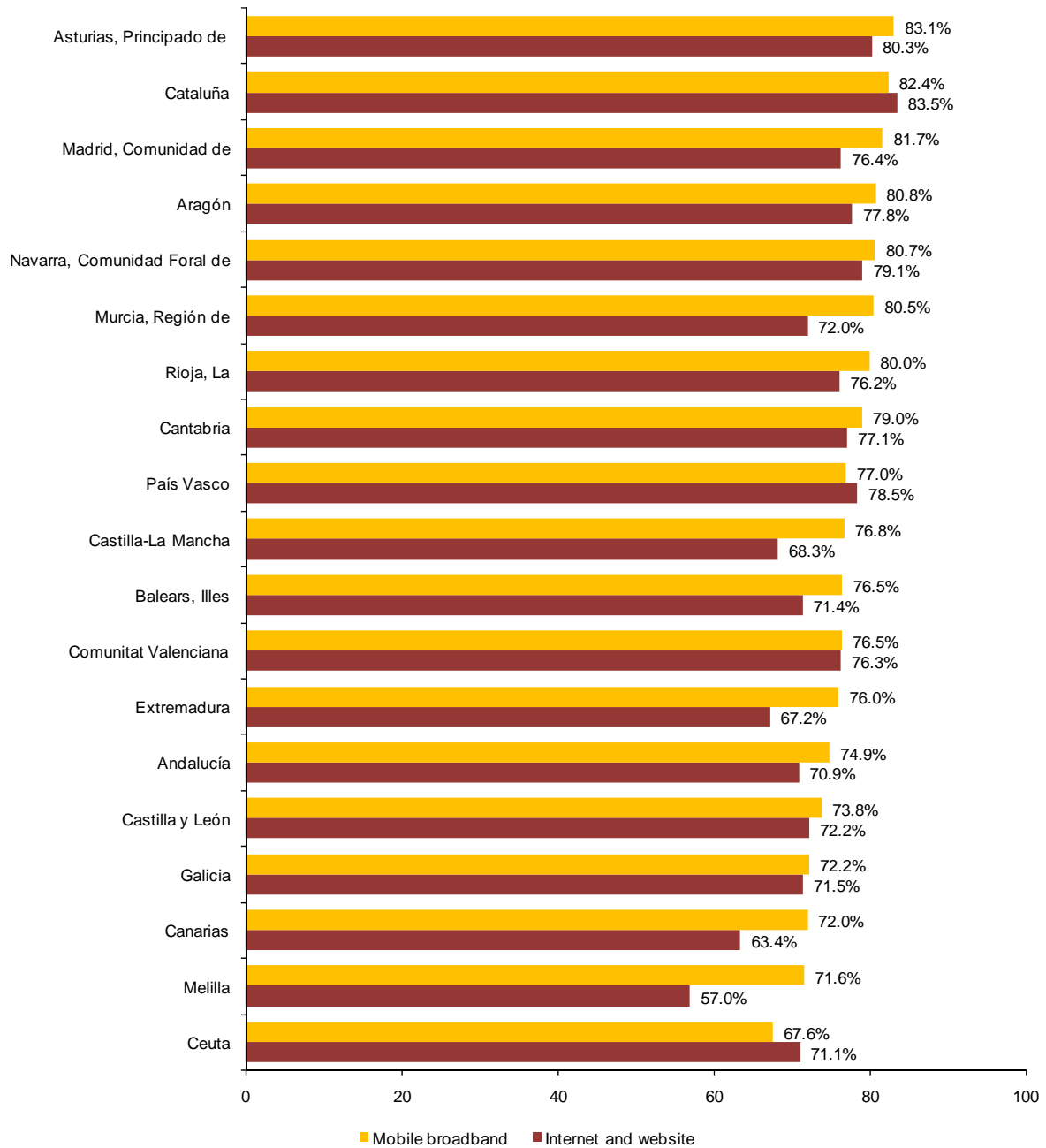
()The intensities in the use of Information and Communication Technologies refer to the following indicators: Internet connection, Interaction with the Public Administrations, Mobile broadband, Website, Use of Social Media and Cloud Computing.*

Use of ICT by Autonomous Community and Autonomous City in which the company is headquartered

First quarter 2014	Internet Connection	Interaction with the Public Administration ⁽¹⁾	Mobile Broadband Connection ⁽¹⁾	Internet connection and Website ⁽¹⁾	Use of Social Media ⁽¹⁾	Cloud Computing ⁽¹⁾
TOTAL	98.3	91.1	78.3	75.8	36.9	15.0
Andalucía	97.6	94.4	74.9	70.9	40.5	11.2
Aragón	98.8	91.7	80.8	77.8	32.3	12.1
Asturias, Principado de	98.6	92.4	83.1	80.3	37.2	11.5
Balears, Illes	99.4	89.1	76.5	71.4	35.5	12.1
Canarias	98.9	94.5	72.0	63.4	40.5	15.1
Cantabria	97.8	95.3	79.0	77.1	35.9	7.2
Castilla y León	98.2	94.2	73.8	72.2	32.2	7.9
Castilla-La Mancha	96.7	89.3	76.8	68.3	32.3	9.3
Cataluña	99.0	90.1	82.4	83.5	39.7	20.8
Comunitat Valenciana	97.2	89.7	76.5	76.3	36.8	14.0
Extremadura	97.1	92.4	76.0	67.2	33.6	8.0
Galicia	97.6	91.8	72.4	71.6	33.2	13.1
Madrid, Comunidad de	98.6	91.5	81.5	76.3	39.8	19.3
Murcia, Región de	99.6	91.8	80.5	72.0	31.0	11.4
Navarra, Comunidad Foral de	98.9	87.7	80.7	79.1	30.1	10.1
País Vasco	98.7	84.4	76.9	78.4	28.4	13.8
Rioja, La	98.3	96.2	80.0	76.2	33.8	11.3
Ceuta	97.9	93.6	67.6	71.1	42.4	3.2
Melilla	96.9	91.5	71.6	57.0	46.0	7.4

(1) Percentage over the total number of companies with an Internet connection

Use of Internet, Website and Mobile broadband by Autonomous Community and Autonomous City in which the company is headquartered



E-commerce

Sales via e-commerce by companies with 10 or more employees

17.8% of companies with 10 or more employees carried out sales via electronic commerce in the year 2013. Turnover generated by these sales reached 195,443 million euros, 6.7% more than in 2012.

The branches of activity with the highest percentages of companies that carried out sales via e-commerce were the following: *Accommodation services* (80.7%), *Food; beverages; tobacco; textile; clothing; leather and footwear; wood and cork; paper; graphic arts and reproduction of recorded media* (25.2%) and *Retail trade* (23.7%)

Sales via e-commerce represented 15.1% of the total sales made by companies with 10 or more employees, as compared with 14.0% from the previous year.

12.2% of companies carried out sales via electronic commerce on a website. The total value of these transactions was 59,315 million euros, 30.3% of the total electronic commerce sales.

68.2% of the sales by e-commerce were to companies (*Business to Business, B2B*). The percentage of sales to final consumers (*Business to Consumer, B2C*) was 29.9%. Lastly, sales to the Public Administrations (*Business to Government, B2G*) represented 2.0%.

Purchases via e-commerce by companies with 10 or more employees

28.5% of companies with 10 or more employees made purchases via e-commerce during the year 2013. The total volume of orders of goods and services made via e-commerce reached 195,405.4 million euros, 6.8% more than in 2012.

The branches of activity with the highest percentages of companies that made purchases via e-commerce were the *ICT Sector* (70.1%) and *Information and communications* (62.9%).

Purchases via e-commerce represented 21.7% of the total purchases of companies with 10 or more employees, as compared with 20.3% the previous year.

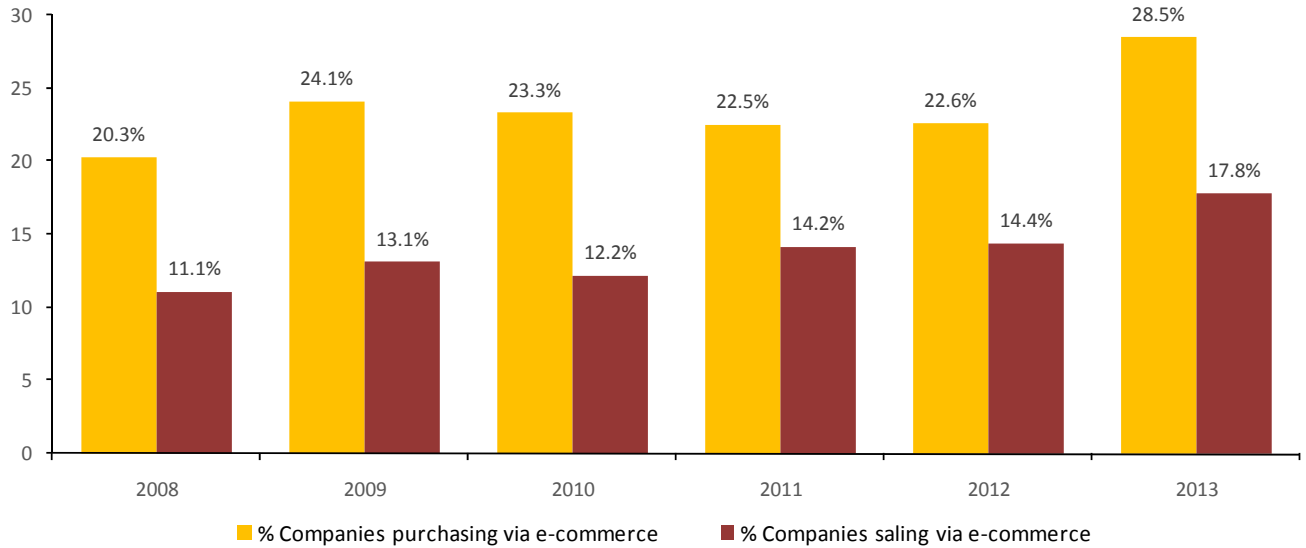
26.9% of companies carried out purchases via electronic commerce on a website. The total value of these transactions was 87,517.9 million euros, 44.8% of the total electronic commerce purchases.

79.1% of purchases via electronic commerce were made within inside Spain, 16.3% to other EU countries(*) and the remaining 4.6% to other countries.

(*)Other EU countries: *Austria, Belgium, Bulgaria, Croatia, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, Netherlands, Poland, Portugal, Romania, Slovenia, Slovak Republic, Sweden and United Kingdom.*

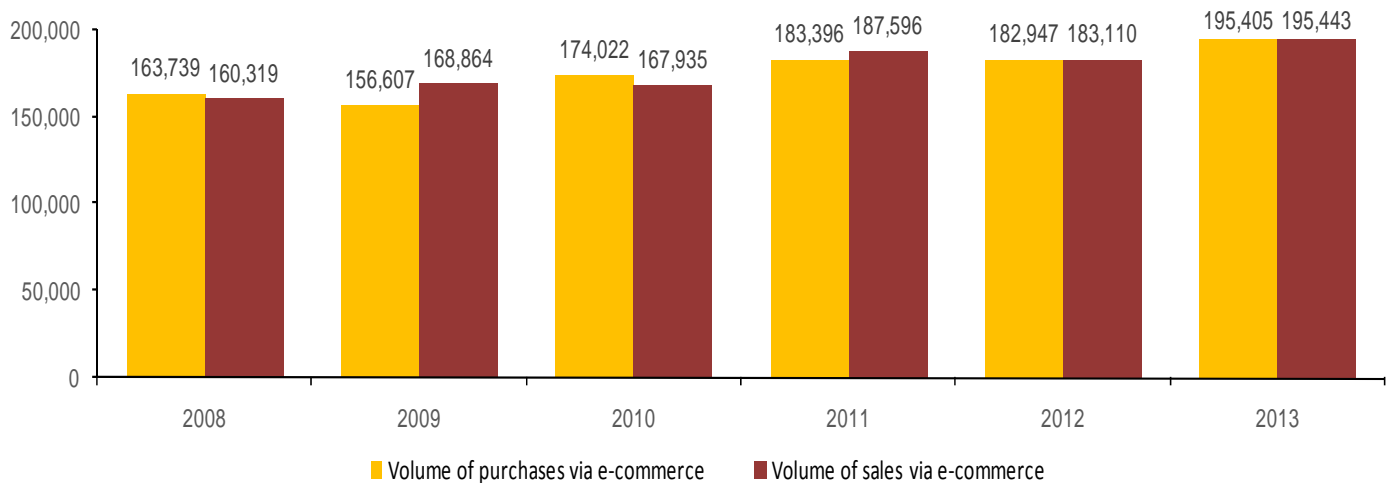
Performance of the percentage of companies with 10 or more employees that carried out electronic commerce (2008-2013)

Percentages calculated over the total number of companies

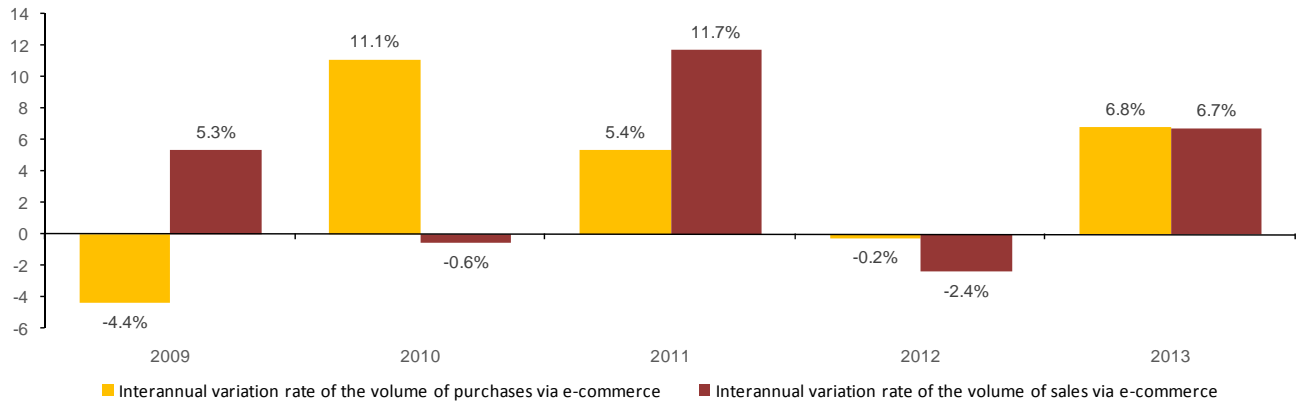


Performance of the volume of purchases and sales made via e-commerce by companies with 10 or more employees (2008-2013)

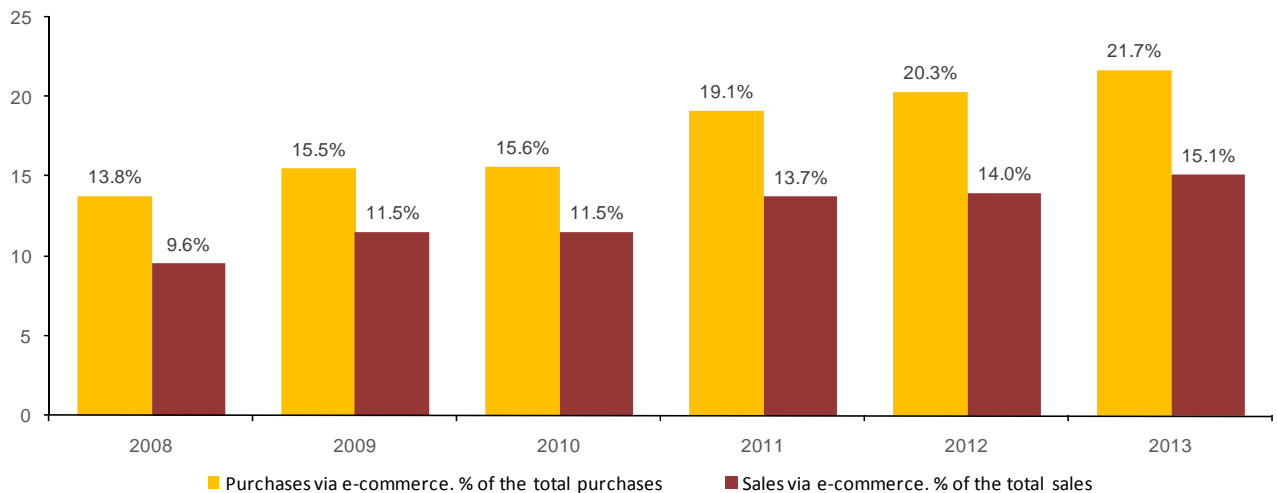
Millions of euros



Performance of the interannual variation rate of the volume of purchases and of the volume of sales carried out via e-commerce by companies with 10 or more employees (2009-2013)



Performance of the percentage of purchases and sales via e-commerce over the total sales and purchases by companies with 10 or more employees (2008-2013)



ICT use in companies with fewer than 10 employees

72.3% of companies with fewer than 10 employees had computers, and 24.4% had a Local Area Network (LAN) installed, according to the data from the first quarter 2014.

67.7% of micro-companies had Internet access, and 99% of them used some broadband access solution.

Regarding communications, 76.5% of companies with fewer than 10 employees used mobile phones, compared to the 74.6% of the previous year, and 21.7% used other technologies (GPS, POS terminal, etc.).

28.7% of companies with Internet access had a website. One year prior, this percentage was 29.3%.

ICT infrastructures in companies with less than 10 employees

Percentage over the total number of companies with less than 10 employees

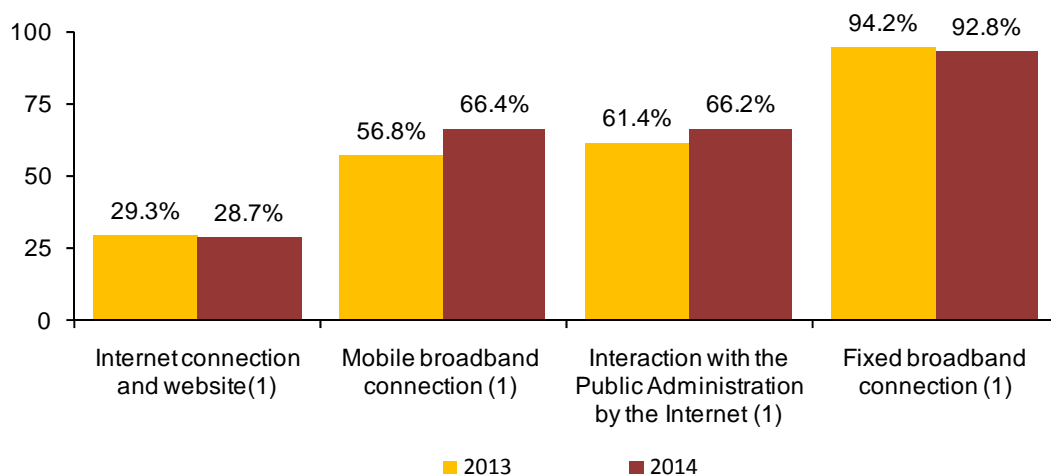
	First Quarter 2013	First Quarter 2014
% companies having:		
-Computers	71.6	72.3
-Local Area Network	24.0	24.4
-Wireless Local Area Network	16.4	17.6
-Internet connection	65.7	67.7
-Broadband (fixed or mobile) Internet connection ⁽¹⁾	98.5	99.0
Mobile telephone	74.6	76.5
Other ICT infrastructures (i.e. GPS, TPV, etc.)	21.4	21.7
% companies having Internet connection and website/webpage ⁽¹⁾	29.3	28.7

⁽¹⁾ Percentage over the total number of companies with less than 10 employees and an Internet connection

Evolution of ICT use in companies with fewer than 10 employees

ICT use also had an uneven behaviour in companies with fewer than 10 employees between the first quarter 2013 and the same period of 2014.

Mobile broadband access experienced the most significant increase, from 56.8% to 66.4%.



⁽¹⁾ Percentage over the total number of companies with an Internet connection

Methodological annex

The survey on the Use of Information and Communication Technologies (ICT) and Electronic Commerce in Companies is integrated in the statistics plans of the European Union designed to quantify the Information Society. It is governed by European Parliament and Council Regulation No. 808/2004, for carrying out statistics regarding 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 i2010 comparative indicators as regards the business sector.

The Survey has been conducted by the National Statistics Institute (INE), in cooperation with the National Foundation Centre of Reference for the Application of Information and Communication Technologies based on Open Sources (CENATIC).

Moreover, there is another partnership agreement with the Ministry of Industry, Tourism and Trade, through Public Business Entity Red.es, for the statistical measurement of the penetration of ICTs 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 dual time scope; the variables regarding ICT use refer to the first quarter 2014, whereas the reference period for the general information on the company, electronic commerce and ICT training is the year 2013.

This study has targeted 15,043 companies with 10 or more employees, and 10,618 companies with fewer than 10 employees, located in Spain and belonging to sections C, D, E, F, G, H, I, J, L, M, N and group 95.1, according to the National Classification of Economic Activities (CNAE-2009).

The sample was designed to offer results by branch of economic activity and by Autonomous Community.

As regards Electronic Commerce, any transaction carried out through telematic networks is considered to be as such. 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.