

SURVEY ON THE INFORMATION SOCIETY -ESI- Companies 2006

There was continued growth for information technology equipment in Basque companies in 2006

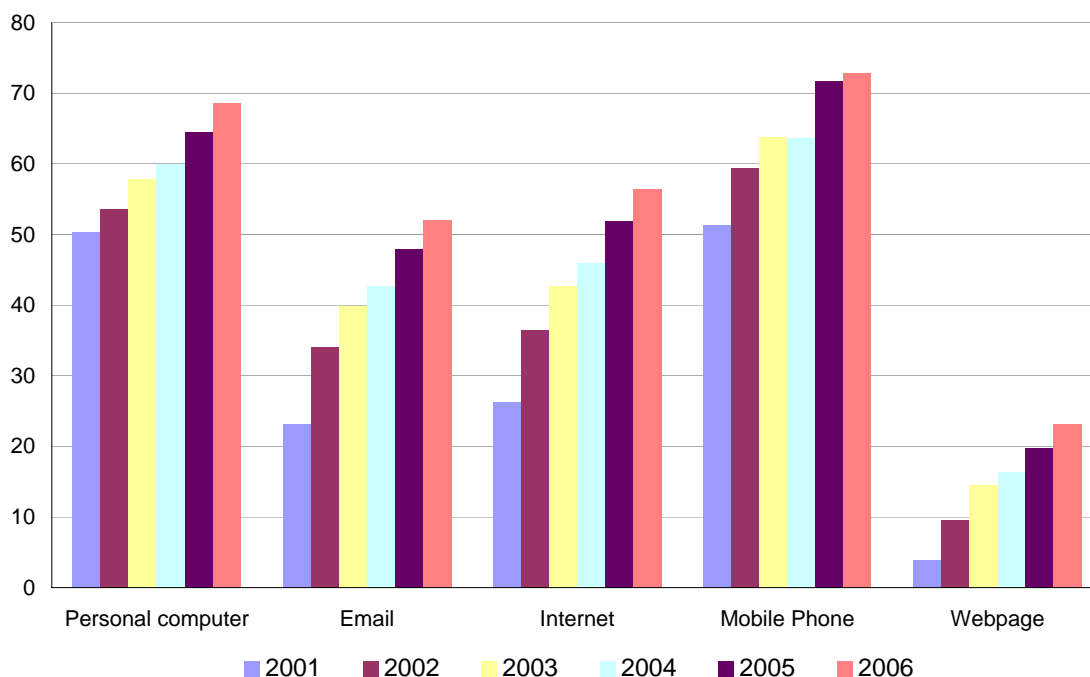
23.1% of companies had a website, rising to 66.4% in companies with more than 9 employees

Basque companies continued to improve their ICT (Information and Communication Technology) equipment in 2006, with an increase of four percentage points, except for the mobile telephone which improved by 1.1 points, according to Eustat data.

68.6% of establishments had a computer, a rise of 4.1 percentage points, while 56.4% had Internet access, an increase of 4.5 points, and establishments with e-mail accounted for 52.0% of the total, a four-point rise. As for the mobile telephone, which was the most widely implemented piece of equipment, this rose 1.1 points to 72.8%.

If we look at the evolution of the various types of ICT equipment in Basque companies over the last two years, we see resurgent growth following the loss of momentum that took place in 2004.

Graph 1: Evolution of ICT equipment in Basque companies (%)



Source: Eustat

Although the differences between the Provinces were not very significant, the establishments of Álava, which obtained the highest percentage increases, were the best equipped as regards these technologies, followed by Bizkaia in Internet, e-mail and websites and Gipuzkoa in computers and mobile telephones.

Table 1: ICT equipment in establishments, by province. 2006.

	Personal computer		Email		Internet		Mobile Phone		Webpage	
	%	Variation*	%	Variation*	%	Variation*	%	Variation*	%	Variation*
A.C. of the Basque Country	68,6	4,1	52,0	4,0	56,4	4,5	72,8	1,1	23,1	3,3
Araba	71,8	4,1	54,4	6,6	58,2	7,6	74,7	-0,4	24,3	4,0
Bizkaia	67,3	3,9	51,7	3,4	56,2	4,4	71,7	0,7	23,1	3,3
Gipuzkoa	69,3	4,4	51,6	3,9	56,1	3,6	73,7	2,2	22,5	2,9

* Difference in percentage points in relation to the previous year.

Source: Eustat

There was also a significant rise regarding the number of employees using these technologies. 59% of personnel used a computer and 47.1% and 47.4%, respectively, had access to the Internet and e-mail. In this case, unlike the previous comparison between establishments by province, the highest percentage of employees using these technologies was in Bizkaia, followed by Gipuzkoa and Álava.

Table 2: Employees using ICT equipment, by size of establishment and province. 2006.

	Personal computer		Email		Internet	
	Total enterprises	10 or more employees	Total enterprises	10 or more employees	Total enterprises	10 or more employees
A.C. of the Basque Country	58,9	60,2	47,3	51,7	47,2	49,1
Araba	56,9	56,1	43,9	46,4	43,1	43,0
Bizkaia	59,7	62,0	48,6	53,6	48,3	50,7
Gipuzkoa	58,8	59,6	47,0	51,9	47,6	50,0

Source: Eustat

Companies with 10 or more employees also showed growth as regards ICT equipment, although less rapidly than the smaller companies

Although there were important increases across all employment strata, the larger the establishment, the more modest was the increase, mainly due to there being little room for improvement as regards equipment in the larger establishments.

Thus we can see that even if the smaller ones (0-9 employees), still had the lowest level of equipment, they narrowed the gap between themselves and the larger companies, having greater percentage increases.

If we look at establishments with 0 to 9 employees, we see that ICT equipment ranged from the figure of 19.8% of establishments with a website to one of 71.8% who had mobile telephones and included 66.4% in possession of a computer, 53.7% with Internet access and 49.0% with e-mail.

In comparison, the average for establishments with more than 10 employees ranged from 66.4% who had a website to 97.6% who possessed a computer and also included 86.4% with mobile telephones, 92.8% with e-mail and 93.0% with Internet access.

However, these differences were not so marked if we took into account the percentage of employees who used these technologies, partly due to the greater progress of smaller establishments and partly to the fact that in the larger ones not all employees had access to the equipment. Results showed that 56.9% of employees in establishments with between 0 and 9 employees used the computer, compared to 60.2% in establishments with more than 10 employees. However, 44.0% had Internet access, compared to 49.1% in the larger companies while 40.0% had e-mail compared to 51.7% in the larger ones.

Most Basque companies accessed the Internet via ADSL

56.4% of Basque companies had Internet access, an increase of 4.5 percentage points for those connected. The most popular means of accessing the Internet continued to be via ADSL lines, whose use continues to rise every year and came to 71.1% of the total number of companies.

The next most common forms of connection, although some distance behind, following a further fall in use, were the modem, (26.1%), and RDSI lines (9.2%). Finally, mobile telephones and other connections accounted for 4.1% and 6.5%.

Table 3: Establishments with Internet access and the form of connection (%).

	Total enterprises					10 or more employees				
	2006	2005	2004	2003	2002	2006	2005	2004	2003	2002
% establishments	56,4	51,9	45,9	42,7	36,5	93,0	91,1	88,1	86,7	80,8
via: Modem	26,1	38,0	42,0	49,3	58,4	13,3	19,8	24,4	25,5	37,5
RDSI	9,2	10,4	11,6	15,3	23,1	13,7	14,4	16,8	25,4	36,2
ADSL	71,1	61,7	53,3	40,3	26,2	82,3	77,5	70,2	58,4	37,2
Mobile Phone	4,1	3,9	2,2	2,0	2,5	6,1	5,3	3,5	3,2	3,0
Other	6,5	5,2	3,2	2,8	2,2	11,1	10,1	7,7	8,0	6,5

Source: Eustat

Among companies with 10 or more employees, 93.0% had Internet access. For this size of company, ADSL lines were also the most popular means of access with 82.3%, followed, also some way behind, by RDSI lines (13.7%), the modem (13.3%), other lines (11.1%) and mobile telephone (6.1%).

Two out of three Basque companies with 10 or more employees had a website

This year has seen a notable expansion of companies in possession of a website, whether on their own server or hosted by a third-party server. Companies who have Internet presence accounted for 23.1% of the total, following an increase of 3.3 percentage points, while among companies with 10 or more employees this figure came to 66.4%, after growing 2.7 points.

Elsewhere, Basque companies took steps to avoid risks to computer security arising from accessing the Internet. 57.6% took some sort of measure, notably through the use

of an antivirus (54.3%), firewalls (31.7%), safe servers (29.5%) and making external backups.

19.5% of Basque companies with 10 or more employees carried out e-commerce in 2005

E-commerce continued to grow in the A.C. of the Basque Country, albeit more slowly than expected. This growth was mainly down to the increase in purchases, which are gradually becoming more common among Basque companies, although the majority are still sceptical about making sales in this way.

10.5% of Basque establishments carried out e-commerce, meaning a rise of 2.8 points with regard to the previous year. This figure came chiefly from the 9.6% who made purchases electronically, a rise of 2.7 points, and less so from those who used this method for sales, which accounted for 1.9%, following a mere 0.2 point rise.

As for companies with 10 or more employees, the proportion of those carrying out purchases or sales via the Internet or through other electronic systems (EDI, Electronic Data Interchange) rose appreciably, representing 19.5%, following an important increase of 5.9 points. In this bracket the bulk of the increase was similarly due to those who made electronic purchases, accounting for 17.2% growing 6.0 points in relation to the previous year and, to a lesser extent, to those who carried out sales in this way, coming to 5.1%, after an increase of 0.9 points.

Methodological note: The Survey on the Information Society (ESI companies) carried out by Eustat in the first quarter of 2006 for the sixth year running, covers Basque companies from any activity sector, except the primary one, and sets out to discover the level of Information and Communication Technology (ICT) equipment, the use made of the Internet and the importance of e-commerce. The survey is based on the response of 7,500 establishments located in the A.C. of the Basque Country.

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