

Introduction on the 2006 ICT-related sector studies

**Preliminary results of
e-Business W@tch survey 2006**

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An initiative of the



**European
Commission**

ICT-related sector studies

■ ICT-related sectors analysed 2006

- **Telecommunications** (NACE 64.2)
- **ICT manufacturing:** with business focus (NACE 30, 32.1, 32.2)
- **Consumer Electronics:** consumer centric focus (NACE 32.3)

■ Reports on ICT related sectors

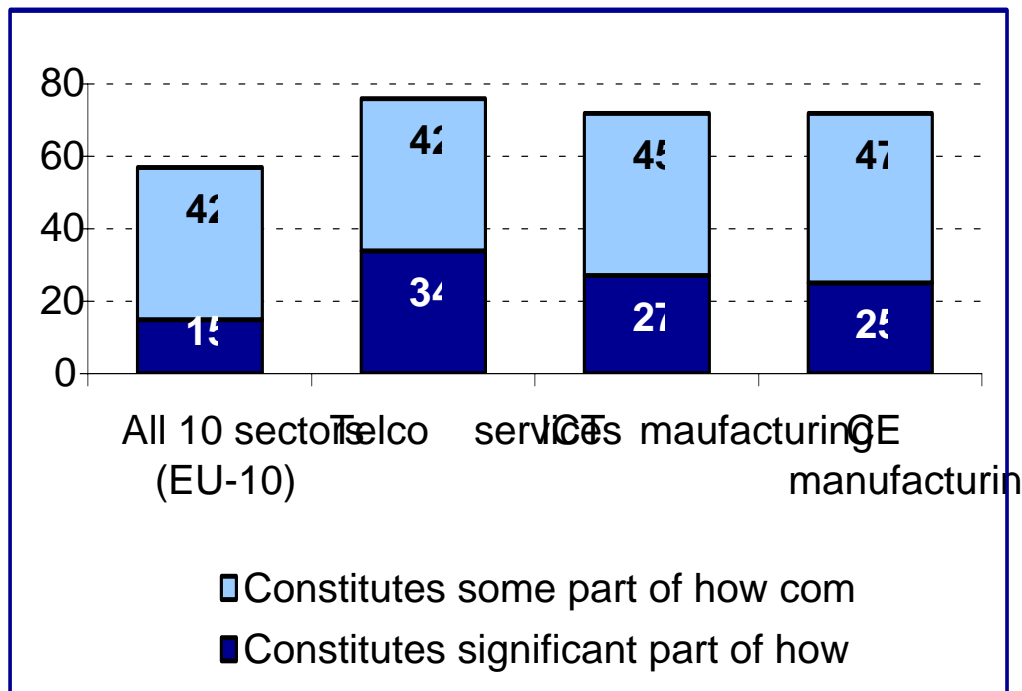
- **Interim Reports (preliminary drafts distributed):** Qualitative analysis of e-business key issues based on
 - Desk research
 - Case studies
- **Final Reports (forthcoming autumn 2006):** Analysis enriched by
 - Empirical findings of the **e-Business W@tch survey 2006**,
 - further case studies and, last but not least,
 - outcome of this workshop.

e-Business W@tch survey 2006

- **Approach and scope of the survey, presentation of results**
 - **Sample: 14,000 (CATI) interviews with computer-using companies of 10 industries, ~30 countries**
 - Telecommunications: N= 1,563
 - ICT manufacturing: N= 1,687
 - Consumer Electronics: N= 665
 - **Comparison by company size:** Micro (1-9 employees), small (10-49), medium (50-249) and large (250+)
 - **EU-wide comparisons between industries** based on EU-10 (CZ, DE, ES, FR, IT, HU, NL, PL, FI, UK)
- **What is in? Survey results reveal information on**
 - **ICT and e-Business usage:** including use of specific tools (e.g. ERP, e-Learning), process support by ICT (e.g. marketing, procurement), specific aspects of ICT usage (e.g. standards)
 - **ICT impact:** significance, drivers, barriers, role for innovation

Characteristics of ICT related sectors

General relevance of e-business



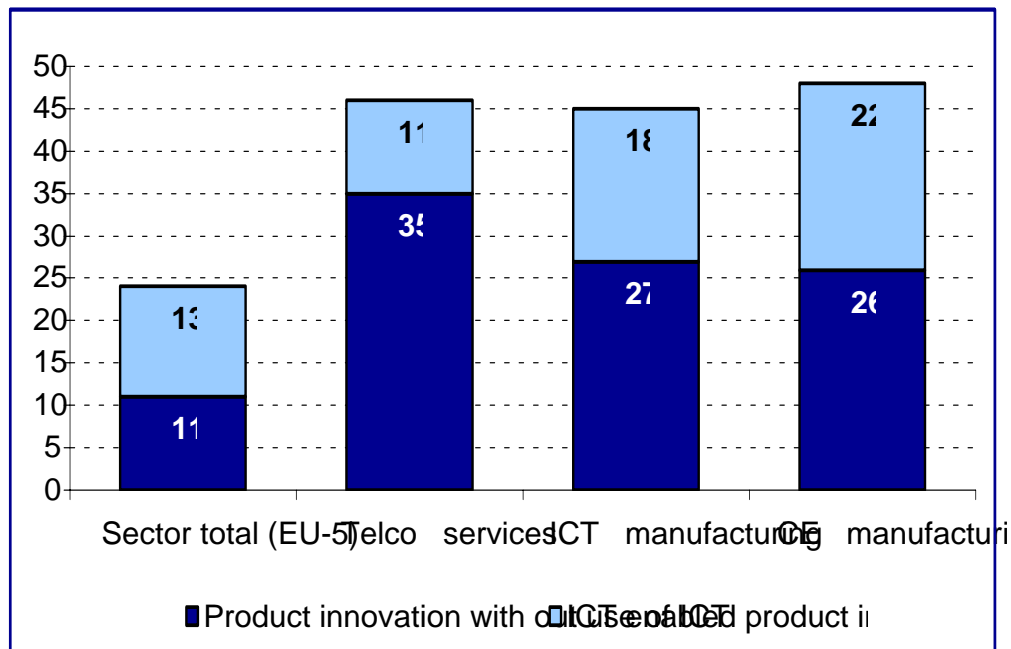
Source: e-Business W@tch 2006, (preliminary) results in „...% of enterprises“.

ICT related sectors are:

- intensive e-business users: usage rates above average in almost all application areas
- familiar with e-business tools: double role as users and suppliers of ICT

Characteristics of ICT related sectors

Product innovations and the role of ICT



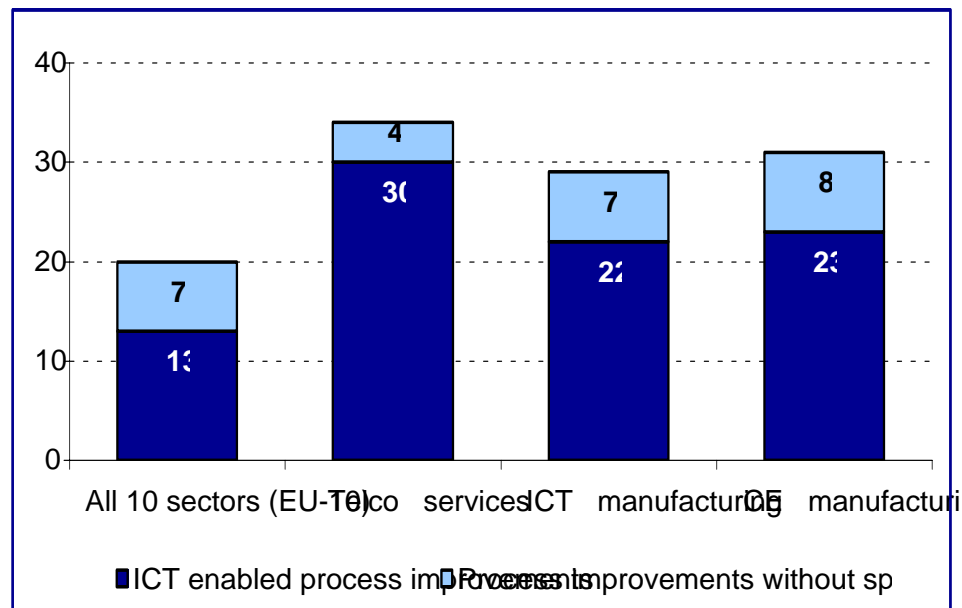
Source: e-Business W@tch 2006, (preliminary) results in „% of enterprises“.

Product innovations:

- Innovations are of high relevance in ICT related sectors: Short product life cycles and increased competition are accelerating product innovations.
- ICT plays a major role for product innovations in ICT-related sectors, e.g. about 76% of product innovations in the telco sector are ICT enabled.

Characteristics of ICT related sectors

Process improvements and the role of ICT



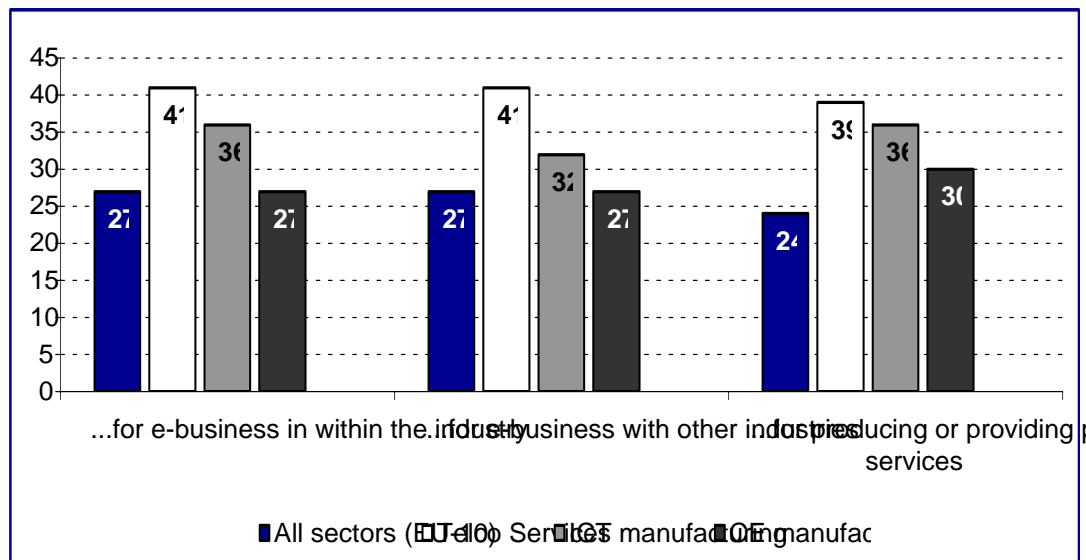
Source: *e-Business W@tch* 2006, (preliminary) results in „...% of enterprises“.

Process improvement:

- Significant share of companies in ICT-related sectors with process improvements during the past 12 months, e.g. driven to cost pressure, changing market structure
- Heavy use of ICT for process improvements, see also further presentations

ICT and e-business in ICT related sectors

Importance of interoperability



Source: *e-Business W@tch* 2006,
(preliminary) results in „...% of enterprises“.

Interoperability issues:

- IO plays a significant role in ICT related sectors, driven also by convergence of platforms and technologies
- “Convergence” turned out as cross-sectoral issue: aspects of convergence analysed as a key issues in all three sector studies

Summary

- **Analysis of ICT and e-Business in ICT-related sectors based on**
 - Case studies and desk research
 - Statistics by the *e-Business W@tch* survey 2006
- ***e-Business W@tch* 2006**
 - Results on use and impacts of ICT and e-Business
 - Allows for comparisons by sectors, countries and size class.
- **Characteristics of ICT-related sectors**
 - Forerunners in ICT usage, high relevance of e-Business
 - ICT plays an important role for product innovations and process improvements
 - Interoperability issues are of high relevance, driven by convergence of platforms and technologies