



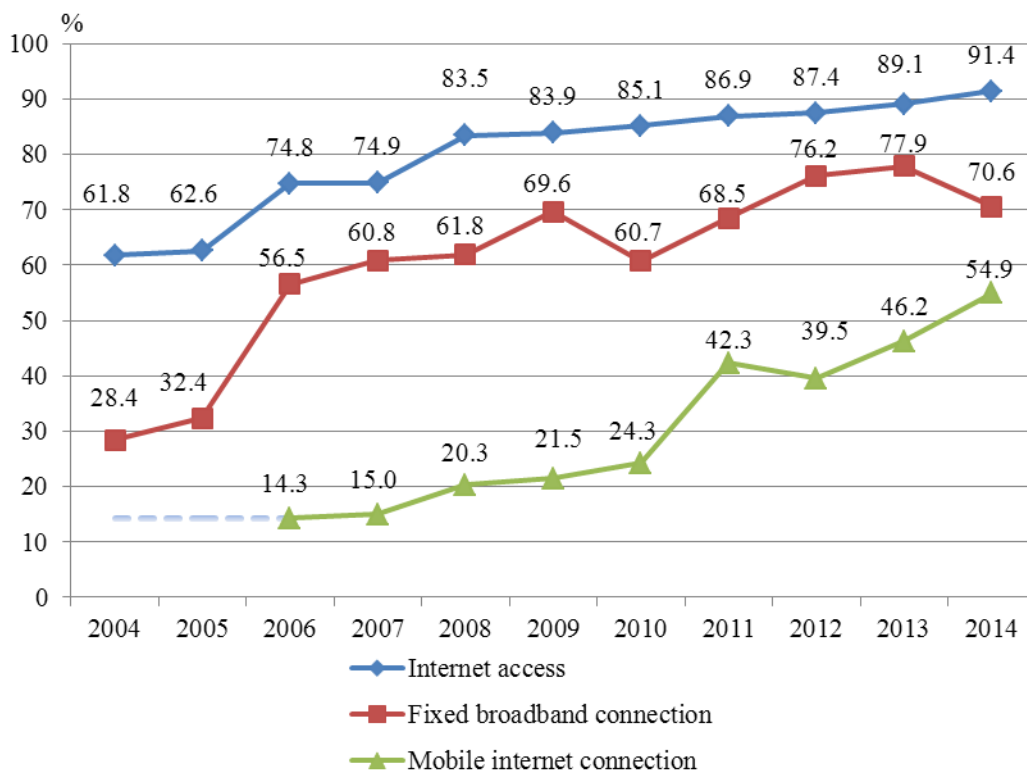
MAIN RESULTS OF THE SURVEY ON THE INFORMATION SOCIETY IN ENTERPRISES IN 2014

According to the Regulation (EU) No. 859/2013 concerning community statistics on the information society in 2014 the National Statistical Institute of Bulgaria carried out a survey on Information Communication Technologies (ICT) usage and e-commerce in enterprises. The survey was conducted in all European Union Member States, based on the common methodology, which ensured international comparison of the results. Non-financial enterprises with 10 or more persons employed were surveyed.

ICT usage in enterprises

The results of the 2014 survey again showed a trend of growth in the usage of ICT by the enterprises. The share of enterprises having internet access reached 91.4% or 2.3 percentage points more in comparison with the previous year. The fixed broadband connection decreased on account of the mobile internet connection¹, which was used by more of the half of the enterprises (54.9%) and during the current year was growing by 8.7 percentage points.

Figure 1. Relative share of enterprises having internet access, fixed broadband connection and mobile internet connection



¹ Internet connection via mobile telephone networks, e.g. 3G, 4G, GSM, GPRS, EDGE.

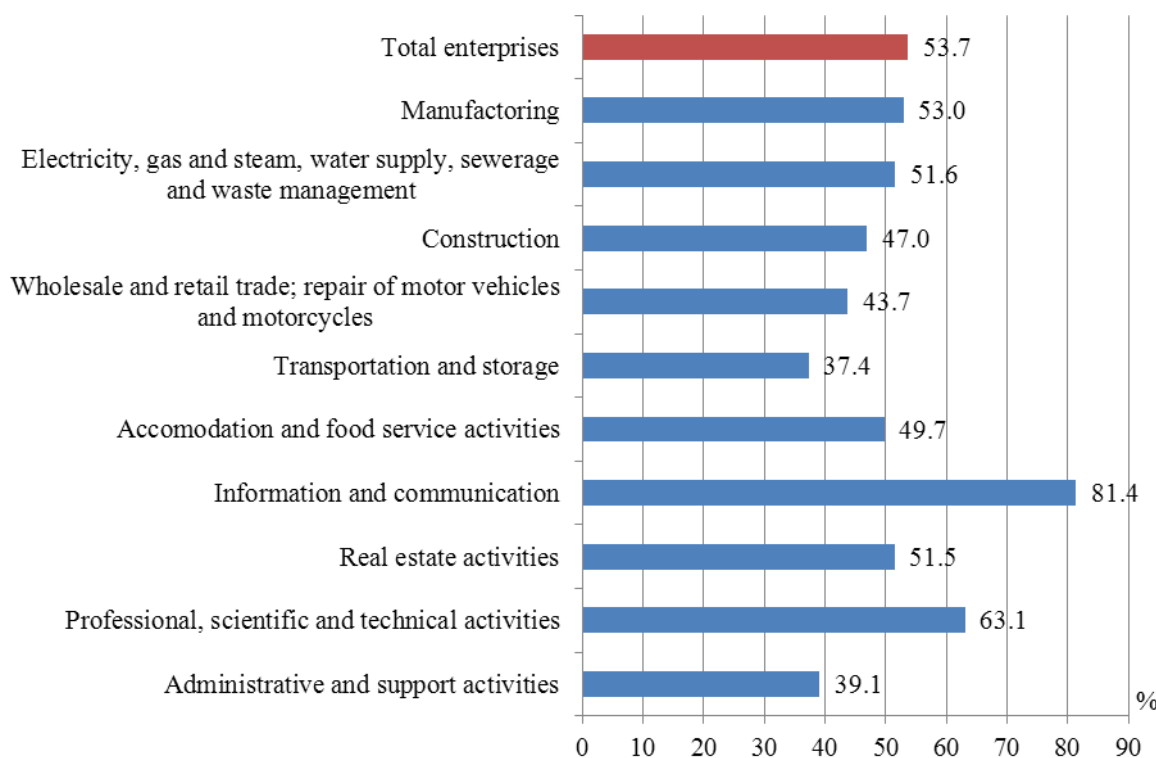


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ICT were the most widely used by the largest enterprises (250 or more persons employed), 99.5% of them had an internet access, while in small enterprises (10 - 49 persons employed) this relative share was 89.9%.

In 2014, 53.7% of the enterprises with internet access maintained their own webpage or website, the largest proportion was in section 'Information and communication' (81.4%), and least enterprises took advantage of this functionality in section 'Transportation and storage' - 37.4%.

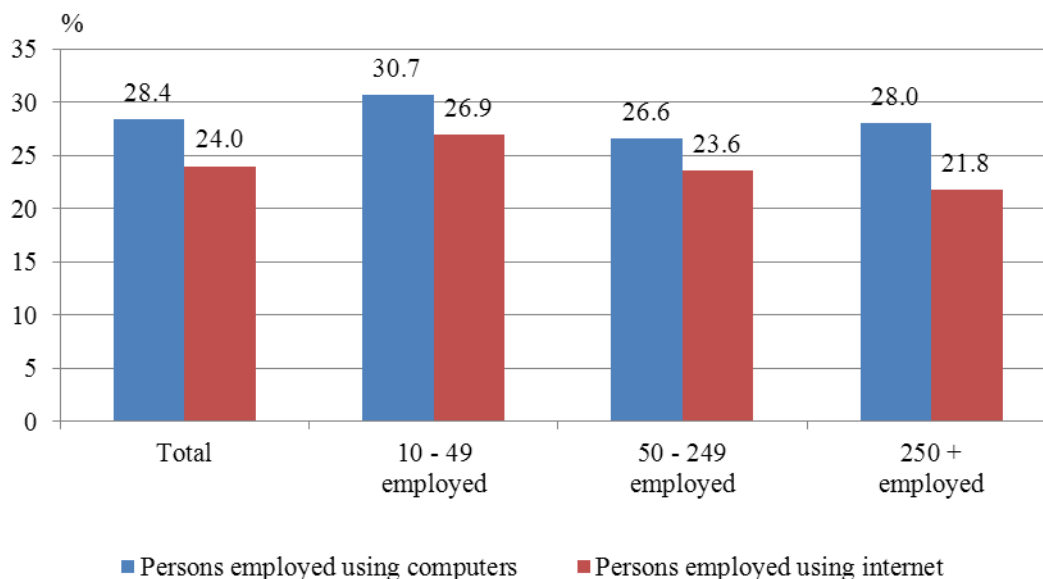
Figure 2. Relative share of enterprises having website by economic activities



In 2014, 28.4% of the persons employed used a computer at least once a week for executing their work duties and 24.0% were granted access to the internet. Small enterprises had the highest relative share of persons employed who were using computer (30.7%) and the highest relative share of employed using internet (26.9%). More and more enterprises provided their employed persons with portable devices and during this year 7.2% of the employed used portable devices for business purposes, which was 2.4 percentage points more in comparison with the previous year.



Figure 3. Relative share of employed using computers and internet (at least once a week) by size class in 2014



Use of Social Media

A lot of enterprises used the social media to strengthen their market presence, to extend the scope of their activity and to increase its effectiveness, and in 2014, their relative share was 30.3% of the enterprises having internet access.

The highest relative share had the enterprises using the social networks (Facebook, LinkedIn, etc.), and 28.7% of the enterprises maintain a profile on a social network. The use of blogs and wiki based knowledge sharing tools was not widespread. They were used respectively by 3.9% and 2.8% of the enterprises.

Large enterprises with 250 or more persons employed were leading in social media usage - 34.7% were present with a profile on a social network, and 11.2% used multimedia content sharing web sites.

Use of cloud computing services

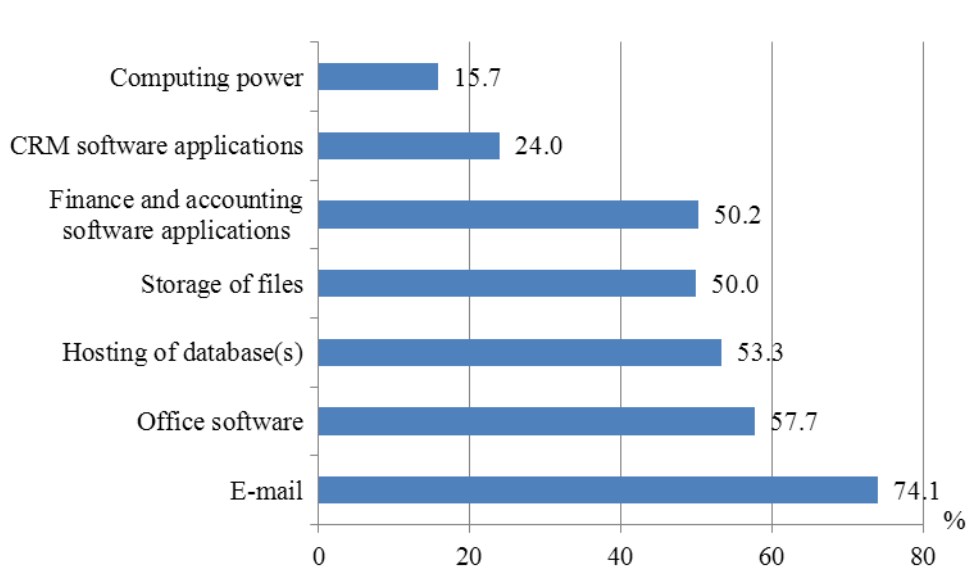
In 2014, for the first time the use of **paid cloud computing services** by enterprises was observed. Speed up and increase of the cloud computing use across all economic sectors is one of the main EU strategies and is a precondition for realizing huge economic benefits, as well as achieving remarkable flexibility, speed and convenience.

Bulgarian companies that took advantage of the benefits of these technologies to optimize their business processes were only 8.5% of the enterprises with internet access, as main users of the cloud computing services were large enterprises with 250 and more persons employed (12.9%).



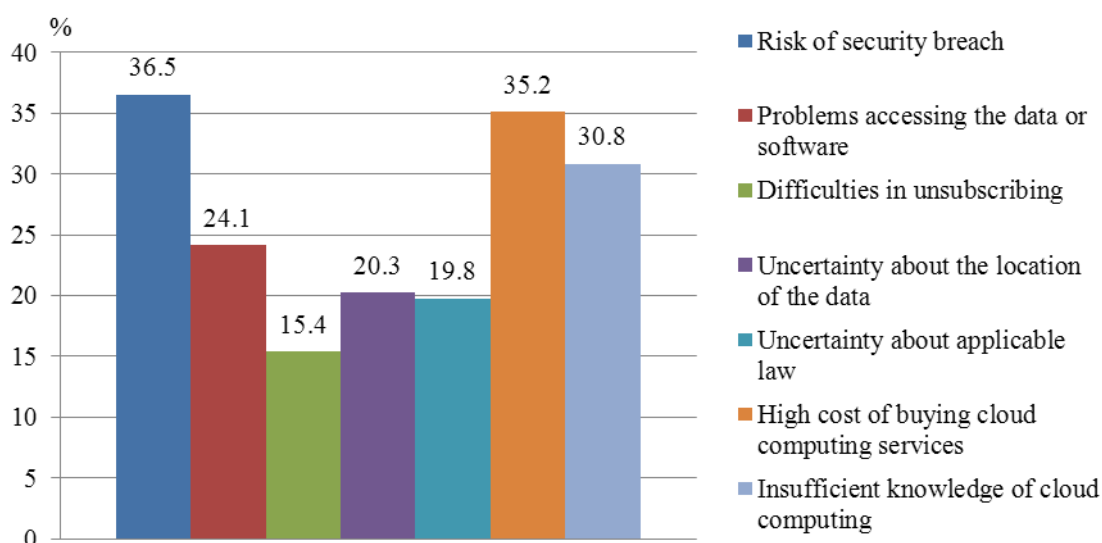
Main purposes for which the enterprises used the cloud solutions were e-mail services (74.1)¹, office software (57.7%) and hosting of database(s) (53.3%). Half of the enterprises relied on cloud computing services to store files (50.0%) and to use finance and accounting software applications (50.2%), and least used was the computing power of the cloud services (15.7%).

Figure 4. Relative share of enterprises using cloud computing services by purposes



More than one third of the enterprises, which have implemented cloud computing services, stated that the main factors limiting a larger use of the cloud computer services were the risk of security breach (36.5%) and the high cost of buying cloud computing services (35.2%).

Figure 5. Relative share of enterprises using cloud computing services by factors limiting usage

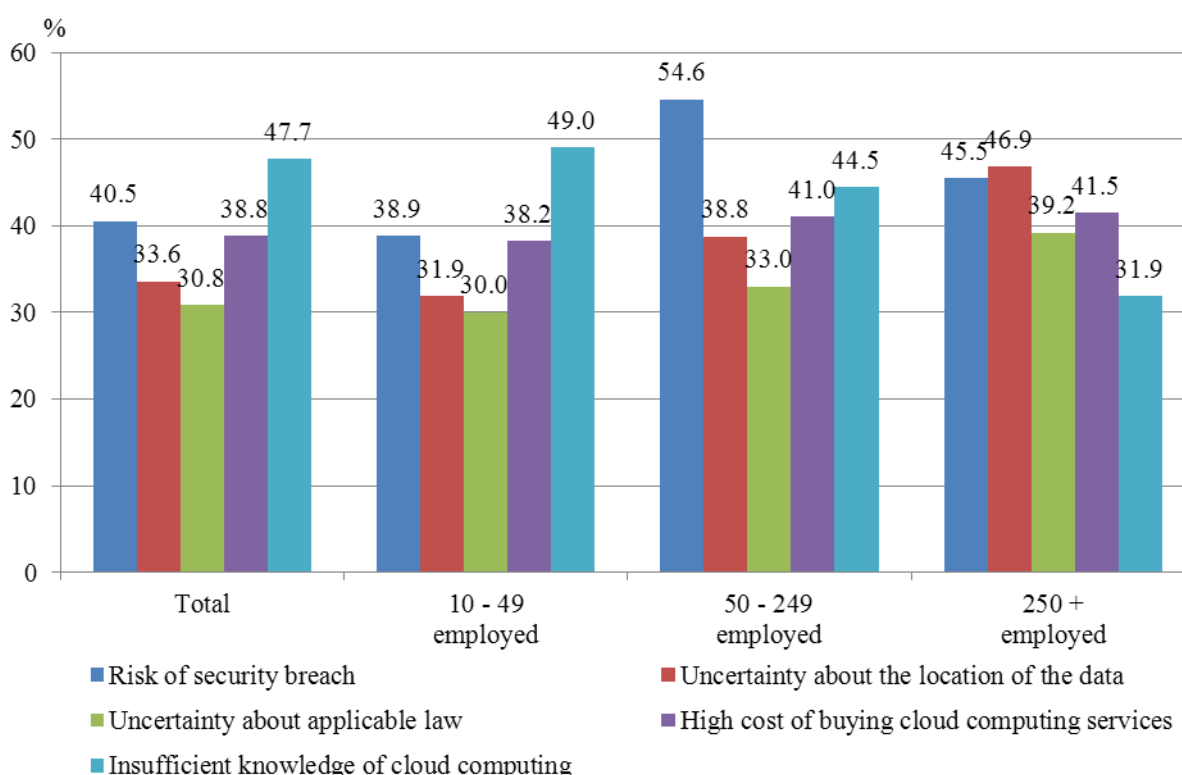


¹ The relative shares were calculated on the basis of enterprises using cloud computing services.



The majority of Bulgarian enterprises were not ready to drop the traditional IT infrastructure and to transfer their data, application and business processes in a virtual environment. As a main obstacle to the deployment of cloud computing solutions the companies indicated insufficient knowledge of cloud computing (47.7%)¹, and this applies in greatest extent for the small enterprises (49.0%). Main concerns of the large enterprises before changing to cloud computing services were the risk of a security breach and uncertainty about the location of the data (respectively 45.5% and 46.9%).

Figure 6. Relative share of enterprises not using cloud computing services by reason and size class



Electronic commerce (e-Commerce)

E-Commerce offers many potential benefits to customers and businesses and the digital market in our country reports lasting ascending trend in the recent years.

Results of the 2014 survey showed that the online sales increased their share with 1.5 percentage points in comparison with the previous year, as 9.5% of the enterprises having internet access received orders online. The total value of the online sells also increased – from 4 409 million BGN in 2013 to 5 058 million BGN in 2014.

A significant increase was observed in the share of enterprises which performed online purchases, as 11.8% of the enterprises purchased goods or services over the internet which was 5.0 percentage points more than the previous year.

¹ The relative shares were calculated on the basis of enterprises which didn't use cloud computing services.



Most active in the use of e-Commerce to improve their business were large enterprises, 19.7% of which purchased goods or services online and 12.3% sold over the internet.

In 2014, 75.6%¹ of enterprises sold goods and services via a website, and 32.9% of enterprises used EDI-type messages. Half of the large enterprises which offered goods or services online preferred to conduct their sells via EDI-type messages (49.4%), and the majority of the small companies sold via a website (77.7%).

Figure. 7. Relative share of enterprises conducting online sales or purchases of goods or services by size class



More information and data from surveys on Information and Communications Technologies usage in enterprises can be found at the NSI's web site: <http://www.nsi.bg/en/content/6132/ict-usage-enterprises>.

¹ The relative shares were calculated on the basis of enterprises selling goods or services online.



Annex

Table 1

Enterprises having internet access and website or webpage by size class

(Per cent)

	2012	2013	2014
Enterprises having internet access			
Total	87.4	89.1	91.4
10 - 49 employed	85.7	87.4	89.9
50 - 249 employed	94.5	95.8	97.0
250+ employed	98.3	99.1	99.5
of which:			
Enterprises having webpage or website			
Total	48.8	52.3	53.7
10 - 49 employed	45.4	48.6	49.8
50 - 249 employed	59.6	64.7	65.6
250+ employed	78.1	78.7	81.0

Table 2

Enterprises using Social Media in 2014 by media type and by size class¹

(Per cent)

Media type	Size class			
	Total	10 - 49 employed	50 - 249 employed	250+ employed
Total	30.3	28.9	34.9	37.2
Social networks	28.7	27.4	33.6	34.7
Enterprise's blog or microblogs	3.9	3.4	5.5	7.6
Multimedia content sharing websites	6.7	6.2	8.3	11.2
Wiki based knowledge sharing tools	2.8	2.3	4.3	5.3

¹ The relative shares were calculated on the basis of enterprises having internet access.


Table 3
Enterprises using cloud computing services in 2014, by size class¹

(Per cent)

	Size class			
	Total	10 - 49 employed	50 - 249 employed	250+ employed
Total	8.5	7.8	10.7	12.9
of which:				
By purpose of use				
E-mail	74.1	75.2	71.1	71.8
Office software	57.7	60.7	50.0	49.4
Hosting of database(s)	53.3	52.6	56.6	47.1
Storage of files	50.0	51.4	46.9	43.5
Finance or accounting software applications	50.2	53.6	45.0	23.5
Customer Relation Management	24.0	23.9	24.4	23.5
Computing power	15.7	13.6	21.6	20.0
By factors limiting the use of cloud computing services				
Risk of security breach	36.5	36.6	37.2	32.9
Problems accessing data or software	24.1	25.9	20.4	15.3
Difficulties in unsubscribing	15.4	16.4	13.7	8.2
Uncertainty about the location of the data	20.3	20.2	20.1	21.2
Uncertainty about applicable law	19.8	20.2	18.7	18.8
High cost of buying cloud computing services	35.2	34.3	38.6	30.6
Insufficient knowledge of cloud computing	30.8	34.3	24.9	8.2

¹ The relative shares were calculated on the basis of enterprises having internet access.



Table 4

Relative share of enterprises conducting sales of goods or services online via a website or EDI-type messages by size class

(Per cent)

Method for selling over the internet	Size class			
	Total	10 - 49 employed	50 - 249 employed	250+ employed
Web sales	75.6	77.7	71.3	61.7
Sales via EDI-type messages	32.9	30.2	38.5	49.4