

ICT usage in enterprises in Montenegro in 2013

The survey on ICT usage in enterprises was conducted on the representative sample of 600 enterprises at the territory of Montenegro.

The target populations are enterprises with 10 employees and over interviewed by the phone in period from 1 to 15 April 2013.

The aim of the survey is to collect the data on presence and usage of ICT by enterprises in sectors: administrative and support service activities; financial and insurance activities; construction; information and communication; real estate activities; manufacturing, electricity, gas, steam and air conditioning; water supply, sewerage, waste management and remediation activities; professional, scientific, and technical activities; transport and storage; wholesale and retail trade; repair of motor vehicles and motorcycles; accommodation.

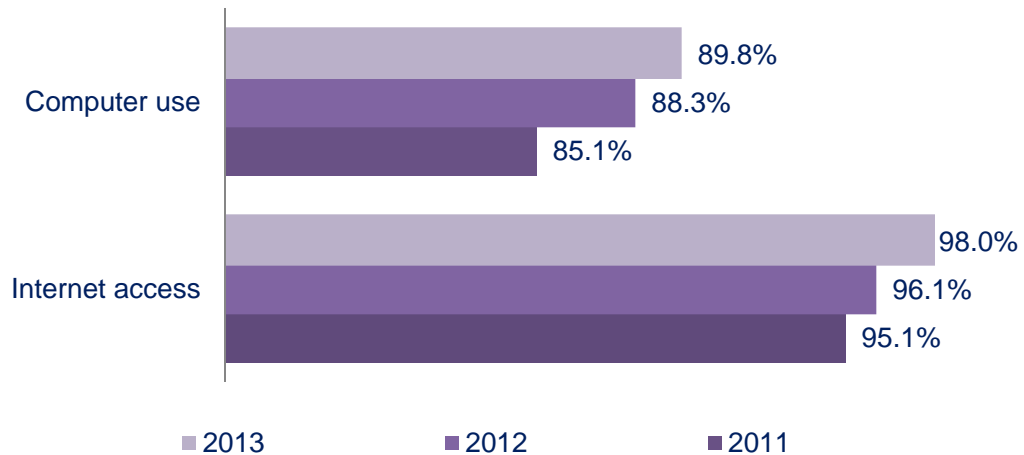
*In Montenegro, 89.8% of surveyed enterprises reported on the use of computers in their activities during January 2013. **All other data in this release refers only on enterprises which were used computers during January 2013, while some data relating to the entire 2012 year.***

Results of survey showed that 67.8% of enterprises allowed their employees remote access to e-mail system, enterprise application or documents, in January 2013.

When it comes to the Internet, the results of survey show that 98.0% of the enterprises, which use computers, have access to the Internet in January in 2013. This is increase of 1.9% referred to previous year.

Of the enterprises that had access to the Internet, 63.3% enterprises responded that they had Web Site/Home Page, in January 2013. This is increase of 10.2% referred to previous year.

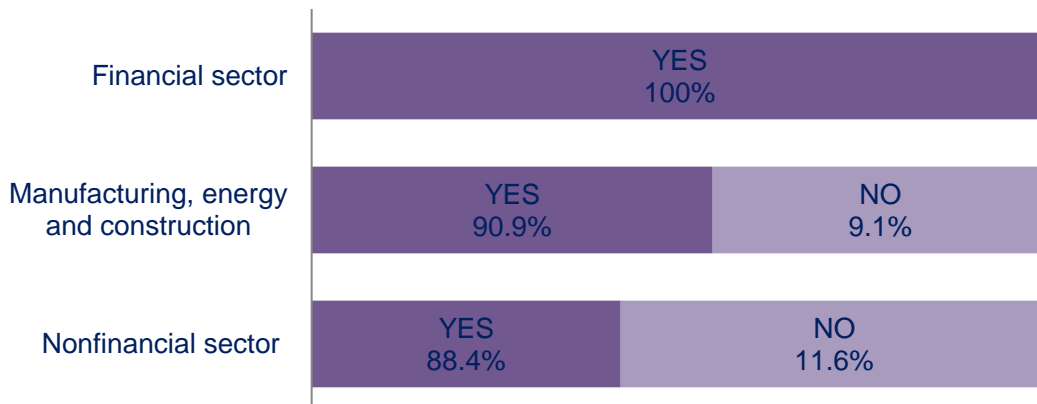
Graph 1: Use of computers and Internet access in enterprises



It is notable increase of 1.5% enterprises which were used computers in January 2013 compared to the 2012 year. Also, percent of enterprises which had Internet access increase for 1.9%.

If we look to enterprises by sectors at Graph we can see percent of enterprises which use computer in their activities during January 2013.

Graph 2: Use of computers by sectors

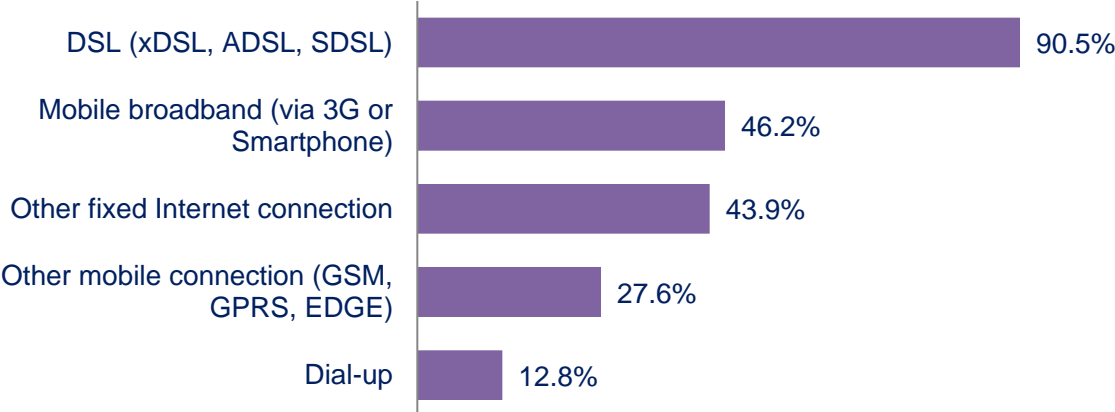


The enterprises that had access to the Internet in January 2013 used the following type of external connection to the Internet:

- ✓ DSL (xDSL, ADSL, SDSlect)
- ✓ Mobile connection (at least 3G modem or 3G handset or Smartphone) using e.g. UMTS, CDMA2000
- ✓ 1xEVDO, HSDPA, PDA
- ✓ Other mobile connection using e.g. analogue mobile phone, GSM, GPRS, EDGE
- ✓ Other fixed Internet connection, e.g. cable, leases line, Frame Relay
- ✓ Dial-up access over normal telephone line or ISDN connection

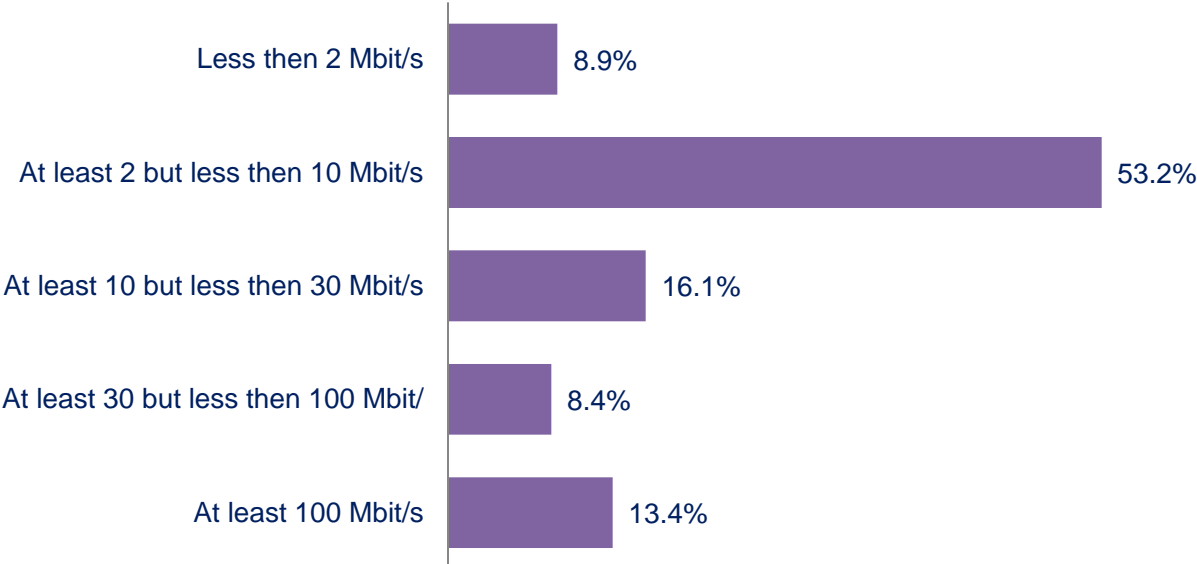
As can be seen in Graph 3, related to enterprises that had access to the Internet during January 2013, 90.5% of enterprises had some type of DSL connection. Other fixed Internet connections have used 43.9% of enterprises, an increase of 19.8% over the previous year. Mobile connection is used by 46.2% of the enterprises, which represents an increase of 8.7% compared to the 2012.

Graph 3: Use of external connection with Internet in enterprises



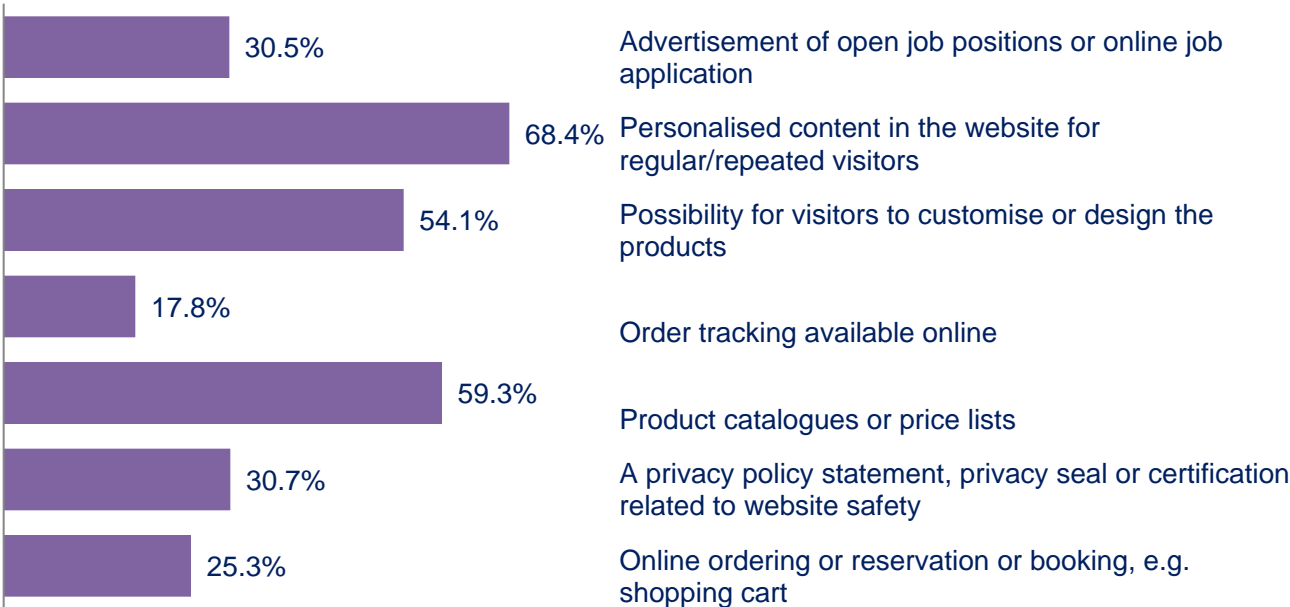
Survey results show that the in 53.2% enterprises maximum contracted download speed of the fastest Internet connection, mostly, was at least 2 Mbit/s but less than 10 Mbit/s. Just 8.9% of enterprises said that contracted maximum download speed less than 2 Mbit/s, but there is a 13.4% of enterprises which contracted maximum download speed at least 100Mbit/s.

Graph 4: Maximum contracted download speed of the fastest Internet



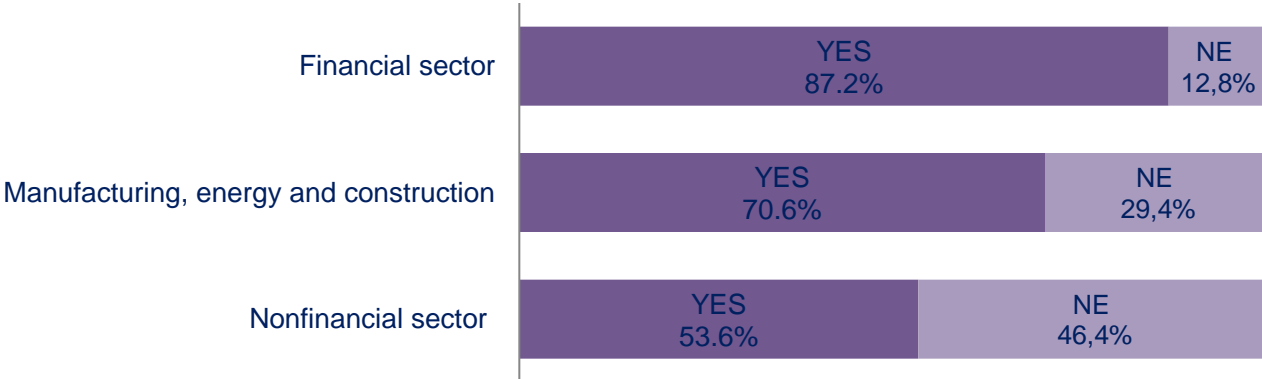
Enterprises with Web Site / Home Page in January 2013 has been provided certain number of services, and 68.4% of enterprises said they had personalized content in the website for regular/repeated visitors, while 59.3% of companies allowed access to Product catalogues or price lists. Possibility for visitors to customize or design the products provided 54.1% enterprises with Web Site / Home Page.

Graph 5: Providing services by Web Site



During 2012, public authorities services over the Internet had used 61.0% of the enterprises. It is notable increase of 3.0% enterprises which use public authorities' services over the Internet for obtaining information 92.2%.

Graph 6: Use of public authorities services



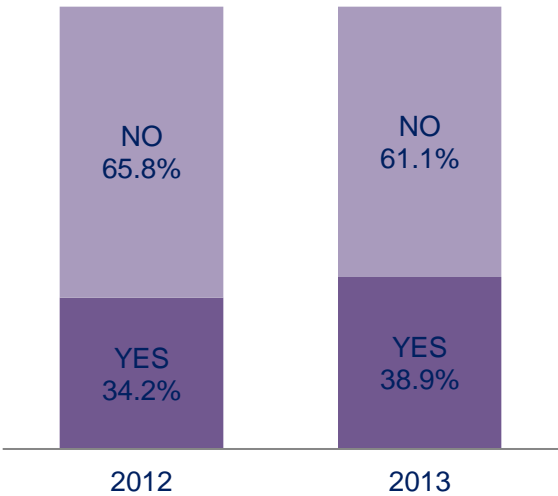
Percent of enterprises that use the Internet for accessing tender documents and specifications in electronic procurement systems of public authorities in 2012 is 49,9%.

Portable devices that allow a mobile connection to the Internet refer to:

- ✓ Portable computers (e.g. notebook, netbook, laptop, Ultra Mobile PC-UMPC, tablet PC etc.)
- ✓ Other portable devices like Smartphone, PDA phone

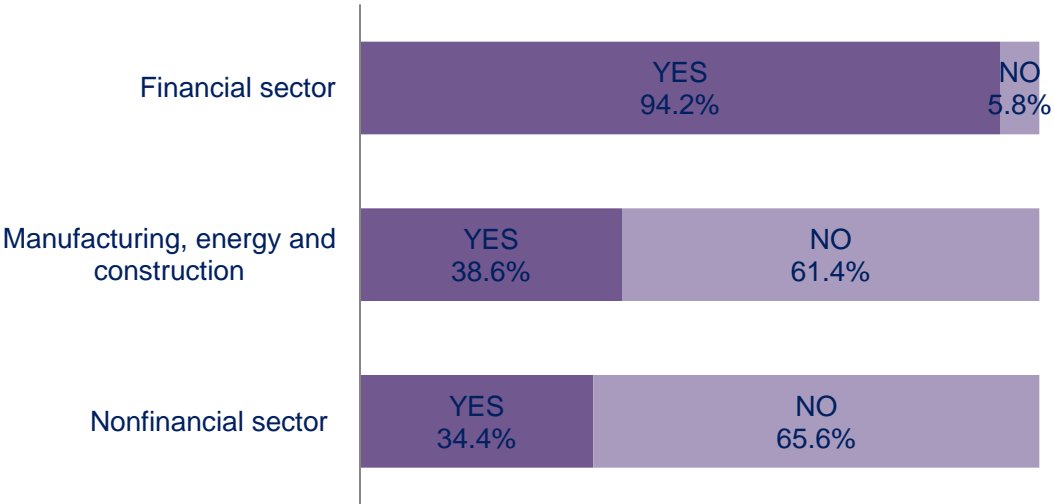
Percent of enterprises that provide to the persons employed portable devices that allow a mobile connection to the Internet for business use in January 2013 is 38.9%, and increased for 4.7% referred to previous year.

Graph 7: Providing portable devices for business use



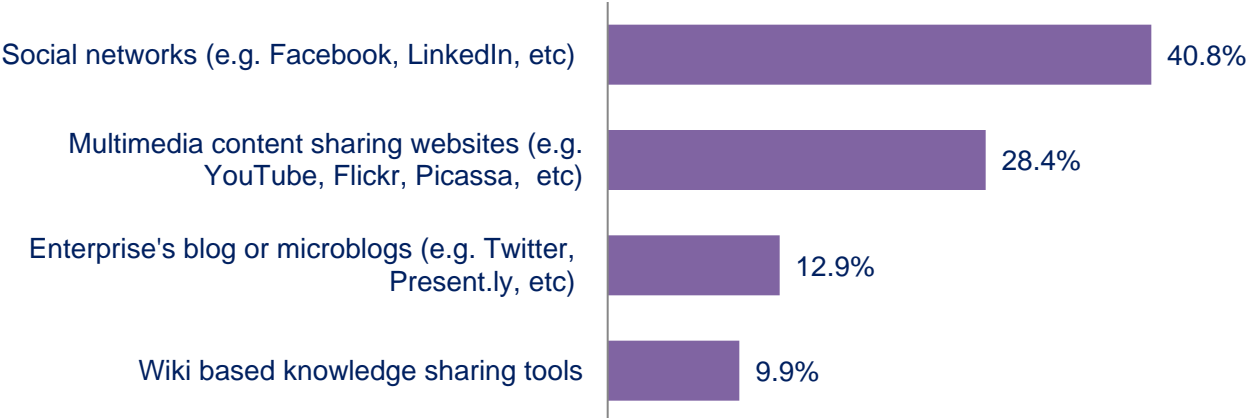
Percent of enterprises that provide to the persons employed portable devices that allow a mobile connection to the Internet for business use in January 2013 is the highest in financial sector – 94.2%.

Graph 8: Providing portable devices for business use by sectors



Percent of enterprise that use any of the social media mostly used Social networks (e.g. Facebook, LinkedIn, etc.) – 40.8%; and multimedia content sharing websites (e.g. YouTube, Flickr, Picassa, etc.) – 28.4%.

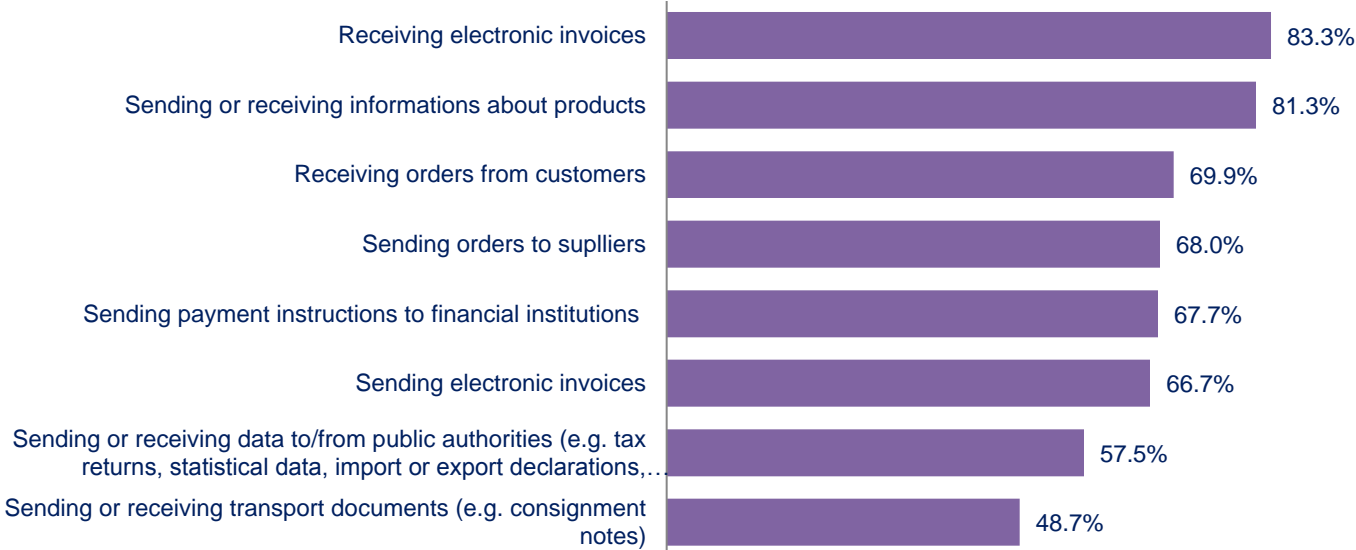
Graph 9: Usage of the social media



Electronic transmission of data suitable for automatic processing - often called Electronic Data Interchange (EDI) means sending and/or receiving of messages (e.g. orders, invoices, payment transactions, product descriptions, transport documents, tax declarations) in an agreed or standard format which allows their automatic processing, e.g. EDI, EDIFACT, ODETTE, TRADACOMS, XML, xCBL, cXML, ebXML to or from other enterprises, public authorities or financial institutions. It not includes the individual message being typed manually and had to be done via any computer network. Automatic exchange of data between enterprises and other ICT systems outside the enterprise and messaging over the Internet or a computer network in an agreed format used by 47.2% of enterprises in Montenegro, during January 2013 and increased for 9,5% referred to previous year.

Enterprises that used EDI usually received electronic invoices 83.3%, and send or receive information about products 81.3%. See Graph 10.

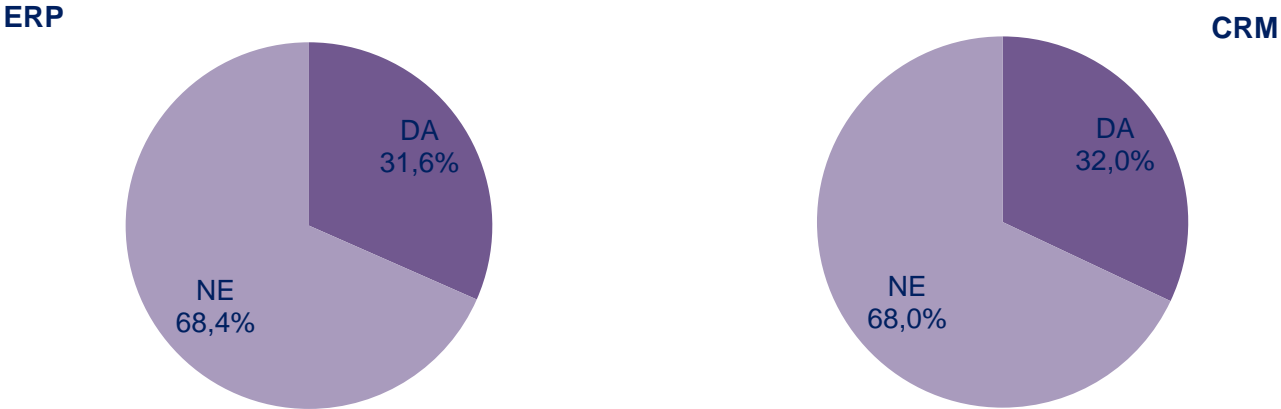
Graph 10: Send or receive electronically information by purposes



Sharing information electronically and automatically between different functions of the enterprise means any of the following: using one single software application to support the different functions of the enterprise, e.g. ERP (Enterprise Resource planning) software; data linking between the software applications that support the different functions of the enterprise; using a common database or data warehouse accessed by the software applications that support the different functions of the enterprise; within this enterprise, sending or receiving electronically information that can be processed automatically.

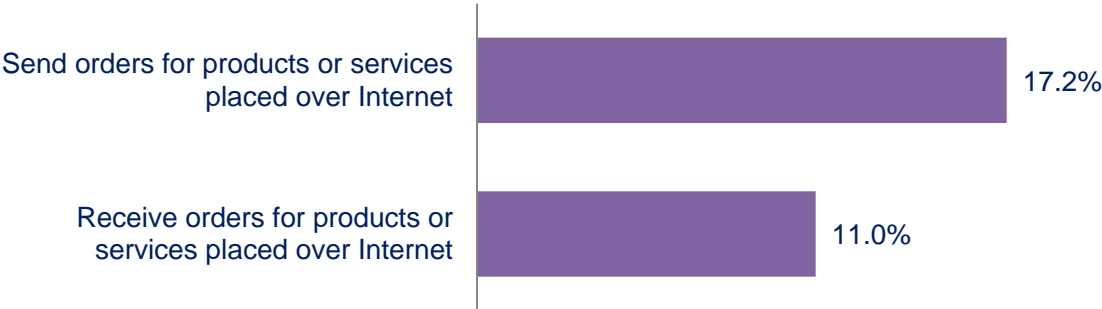
Percent of enterprises that used ERP¹ software package to share information between different functional areas (e.g. accounting, planning, and marketing) is 31.6%. 32.0% enterprises used software application for managing information about clients (so called Customer Relationship Management – CRM software)².

Graph 11: Usage software applications ERP and CRM



The percentage of enterprises that received orders over the Internet is 11.0%, while the percentage of companies that have placed orders over the Internet is 17.2%.

Graph 12: E-commerce in enterprises



¹ERP (Enterprise Resource Planning) consists of one or more software applications that integrate data and processes across several business functions of the enterprise.

²CRM refers to the use of information technology to collect, integrate, process and analyze information related to the client and puts the customer at the center of its activities

METODOLOGICAL NOTES

Statistical Office of Montenegro conducts survey on the use of information and communication technologies in Montenegro. This survey refers to the use of information and communication technologies in enterprises, as well as the use of ICT by households and individuals.

Enterprises

- ✓ The survey was conducted from 1 to 15 April 2013.
- ✓ Telephone interview
- ✓ A stratified sample - sample size 600 companies
- ✓ The target group are companies with 10 or more employees by activity (NACE Rev. 2)
- ✓ Reference period for most questions is January 2013 while some issues related to the entire 2012

Data are published on our website: www.monstat.org

Published and printed by Statistical Office of Montenegro (MONSTAT)
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