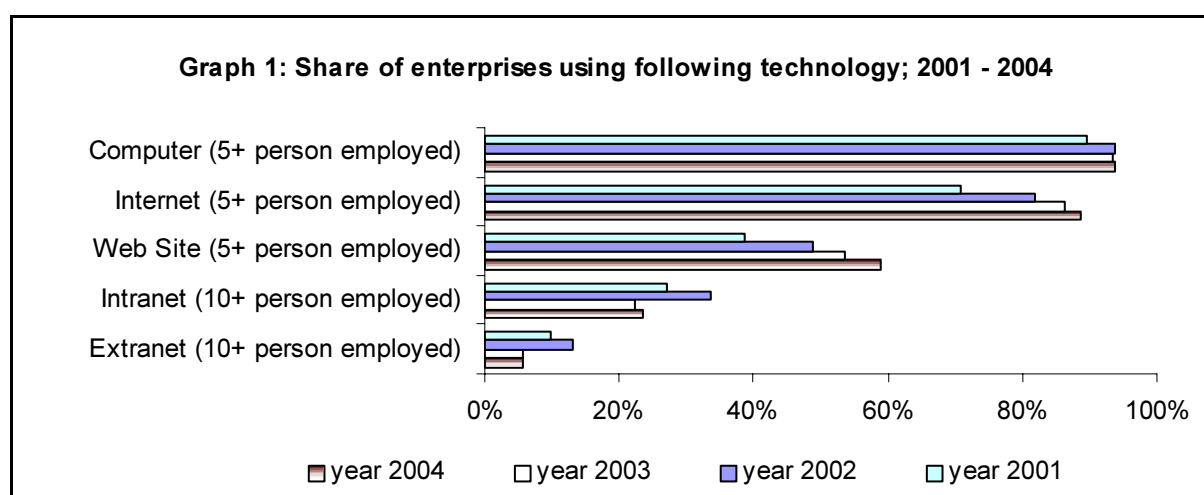


Information and Communication Technology in Business Sector Analytical part

Results of any survey on ICT usage depend on accuracy of used definitions, clarity and precision of explanatory notes and especially on ability of respondents to answer a query correctly. That is the reason, why in the comment a special attention is given to those cases when the time series of indicator were influenced by the shift in understanding the content of the same way put questions. Values of indicator are also influenced by a shift in a target population, especially when number of enterprises is low.

1. ICT infrastructure

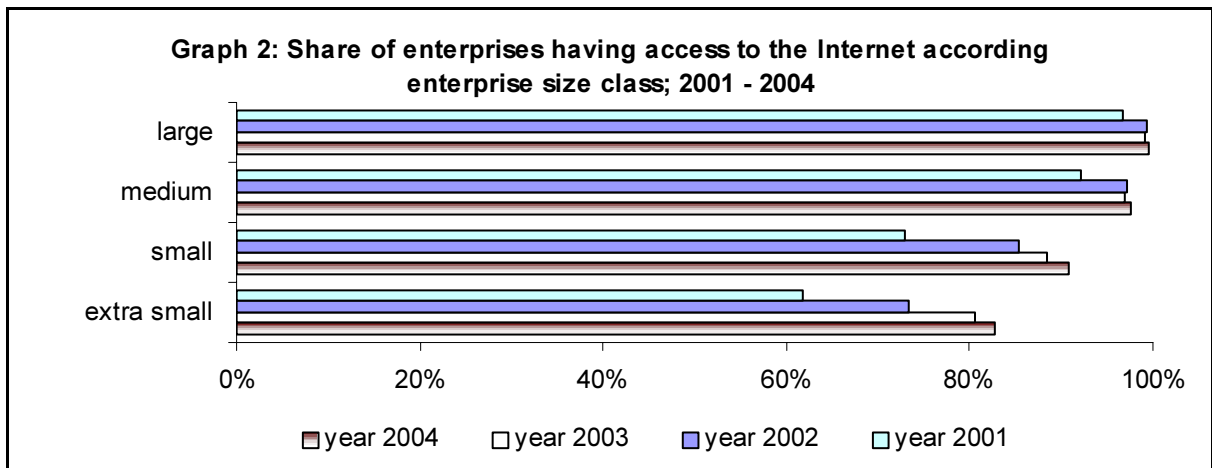


Personal computer (desktop, notebook, work station) is considered to be basic working tool in information society necessary for usage of the most modern information technologies.

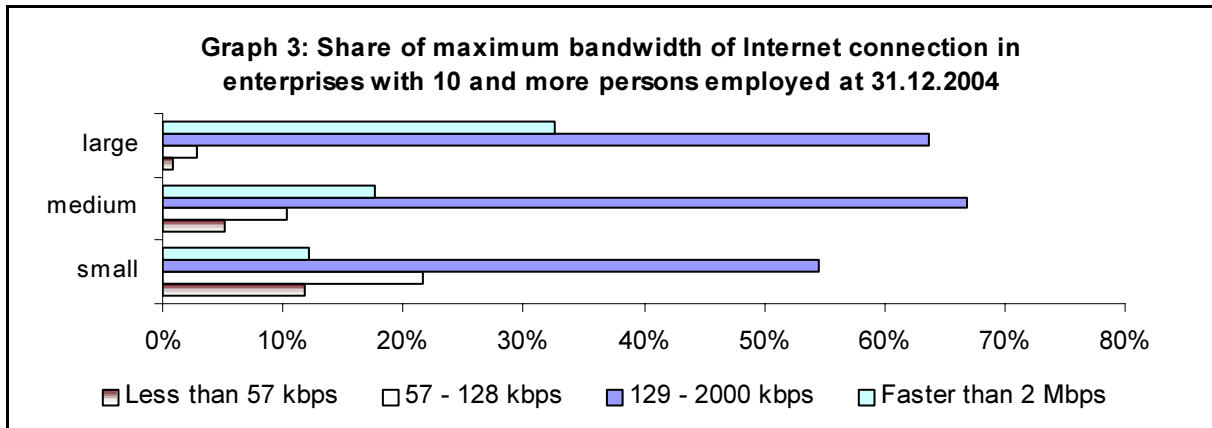
At the end of 2004 less than 60 thousand Czech enterprises, these present 93,6 % of total number of enterprises in business sector, owned approximately 971 000 computers. Nearly all large and medium enterprises were using computer. Exceptions to mentioned above are enterprises, for which ordinary computer needed work is done by other legal entity or which use outsourcing to provide these activities.

A large drop in percentage of enterprises using the Intranet or Extranet recorded previous survey did not occur. The situation seems to get stabilized for Extranet and we can see small increase in percentage of enterprises using Intranet during 2004.

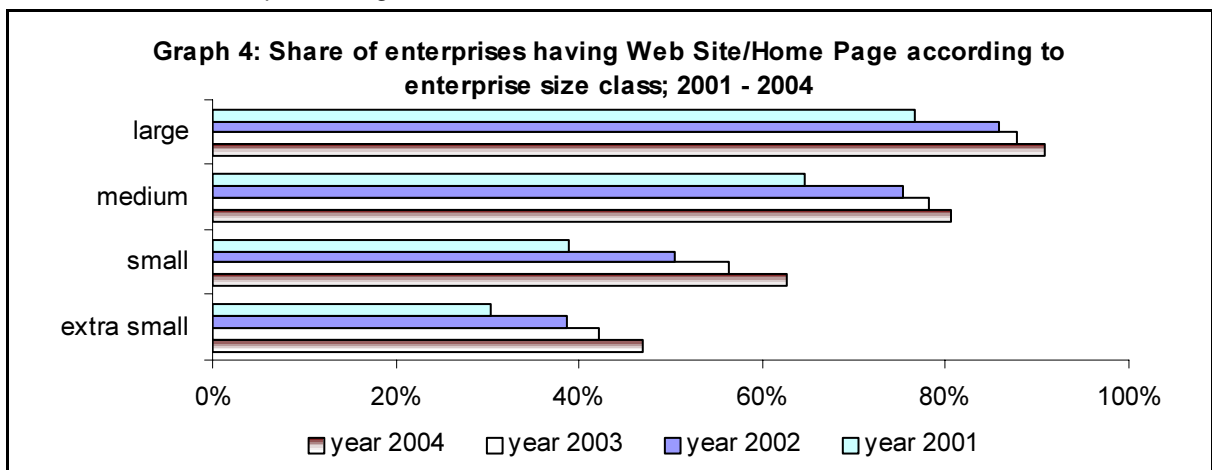
Spread of the Internet usage in the Czech enterprises is relatively high. At the end of year 2004 approximately 88,6% of enterprises with 5 and more persons employed in selected branches had a connection to the Internet. In comparison to level recorded in year 2003 there was 2,3 percent point growth. The total number of enterprises with access to the Internet grew to approximately 56 750.



A share of broadband Internet connection (with speed higher than 128 kbps) in enterprises with 10 and more persons employed was 71,2 % (65% of all enterprises) in 2004. Enterprises carried on promptly upgrading their Internet connection to the higher speed connection that resulted in the increase by 19 percent points.

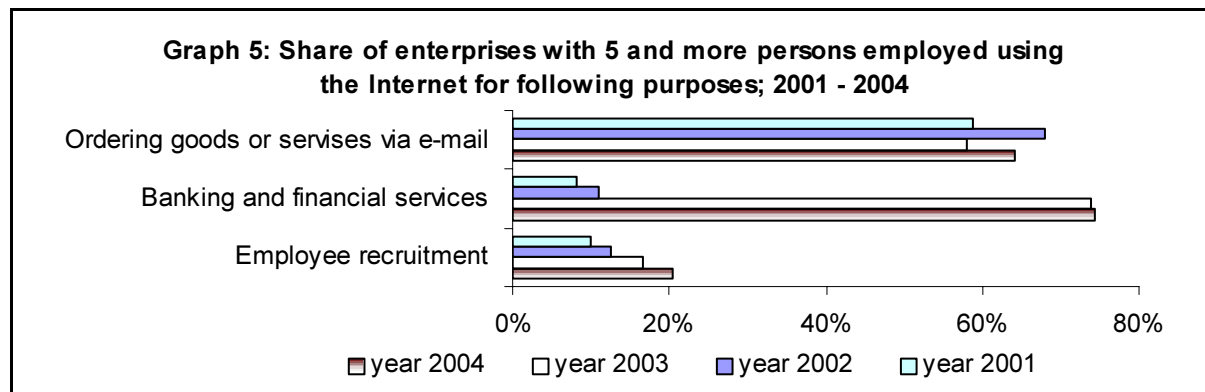


At the end of 2004 approximately 59 % enterprises with 5 and more persons employed in selected branches of business sector had their own Web Site / Home Page. It represents more than 38 thousands of enterprises. A growth trend continued.

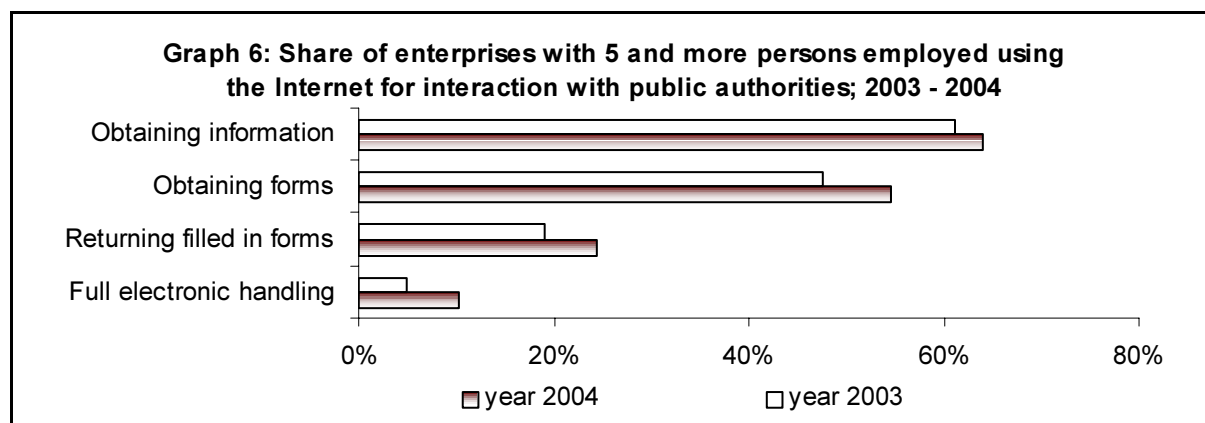


2. Use of the Internet

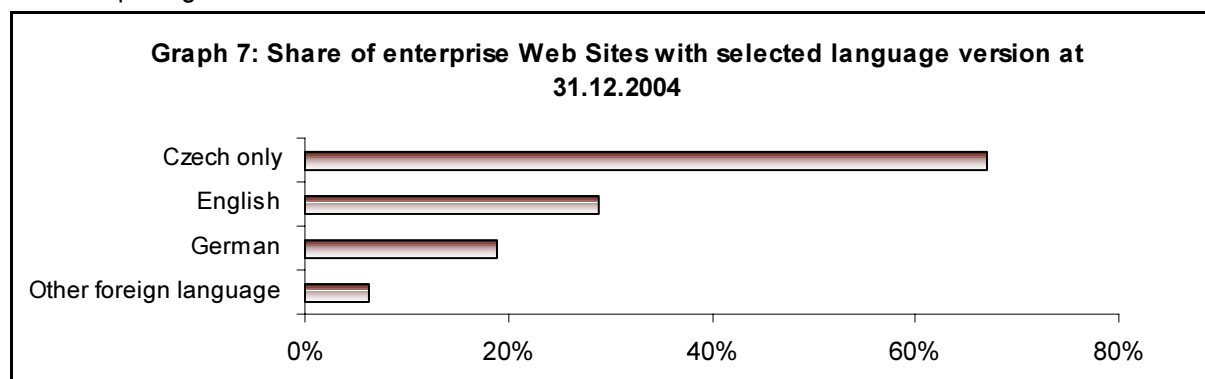
In 2004 seventy four percent of enterprises with 5 and more persons employed were using banking and financial services. Their share has nearly not changed on year on year basis. High percentage of enterprises (around 64%) ordered goods or services using manually written e-mail and approximately 20 % used the Internet for recruitment.



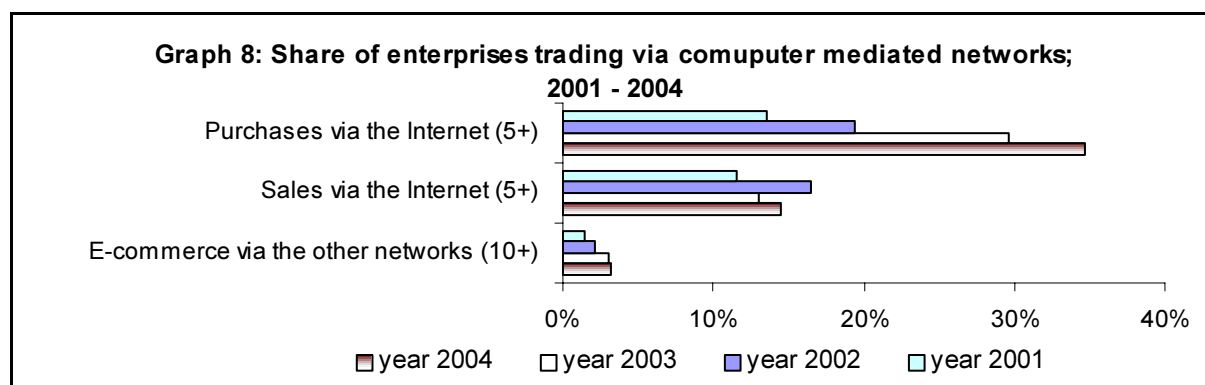
Use of the Internet for interaction with public authorities in 2004 was relatively high for obtaining information (61% of enterprises) and obtaining form (57% of enterprises). Sending of filled in forms and full electronic transactions are not so common.



Number of enterprises having foreign language version of a web site in 2004 was 15,5 thousand and their number increased interannual by 2 300 (decreased share of these enterprises is the resulted of higher number of enterprises having Web Site/ Homepage this year). The fact, that enterprises offering accommodation reported the highest percentage of web site homepages in foreign language, is not surprising.

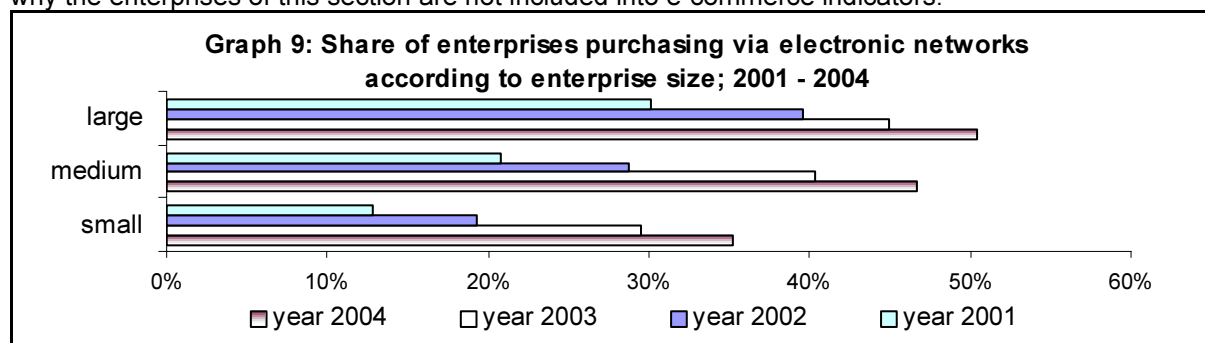


3. E-commerce

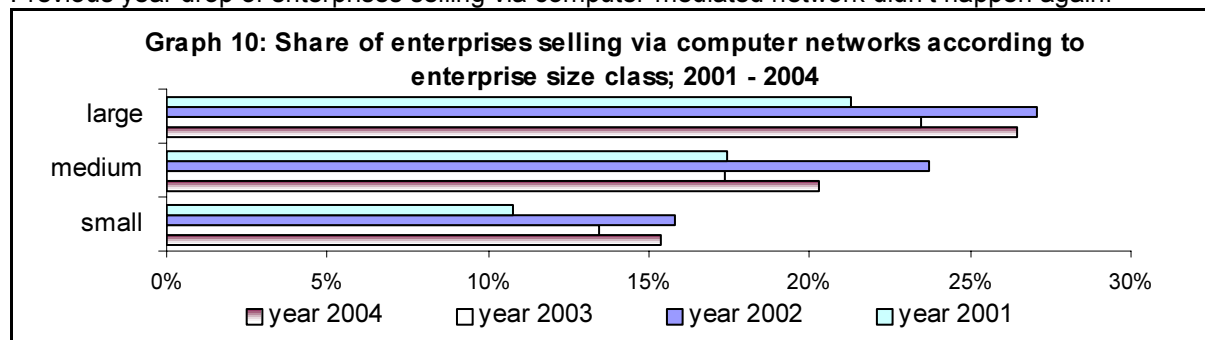


In 2004 approximately 14,5 thousand of enterprises purchased goods or services via the computer mediated networks. Their share was about 37,75 % of total number. Year to year increase was about 6 percent points.

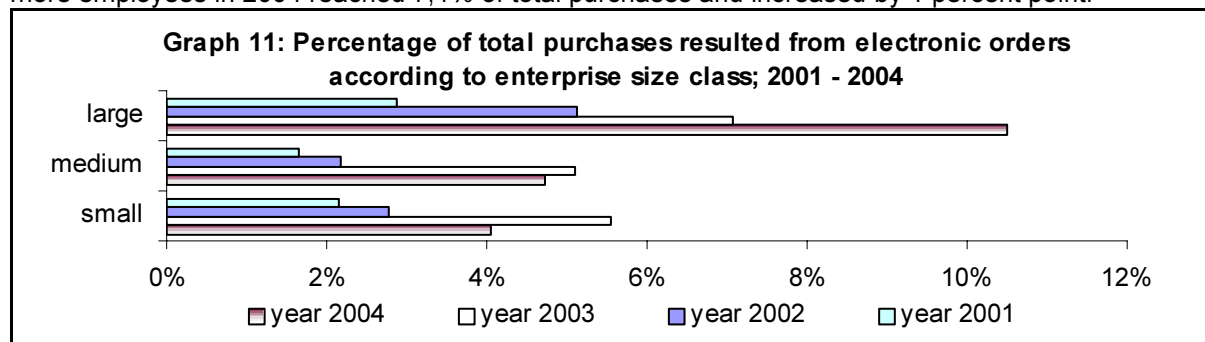
Because of different activity and different structure of accounting system in section of financial intermediation values of purchases and sales obtained in this section seems to be problematic. That's why the enterprises of this section are not included into e-commerce indicators.



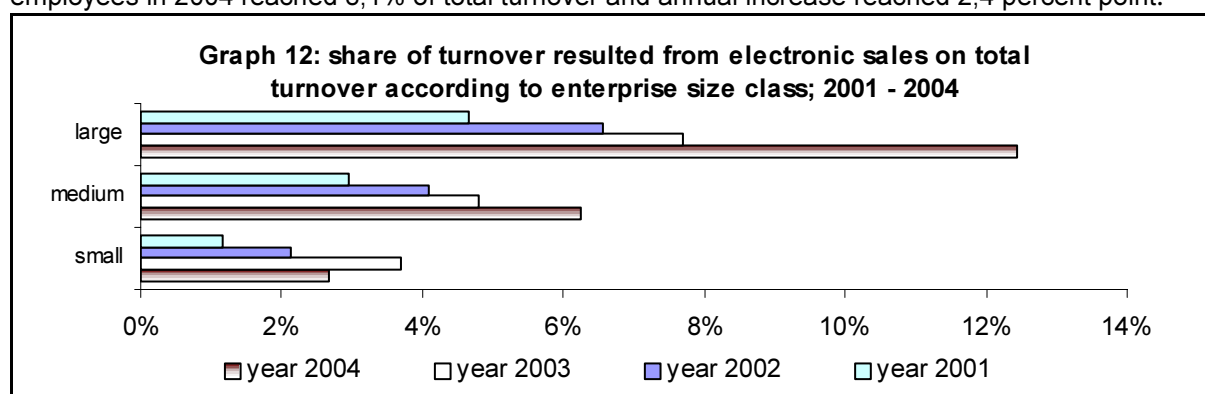
More than 9,8 thousand of enterprises with 10 and more employees sold their products, goods or services via computer-mediated network in 2004 and their number increased by more than 10%. Previous year drop of enterprises selling via computer-mediated network didn't happen again.



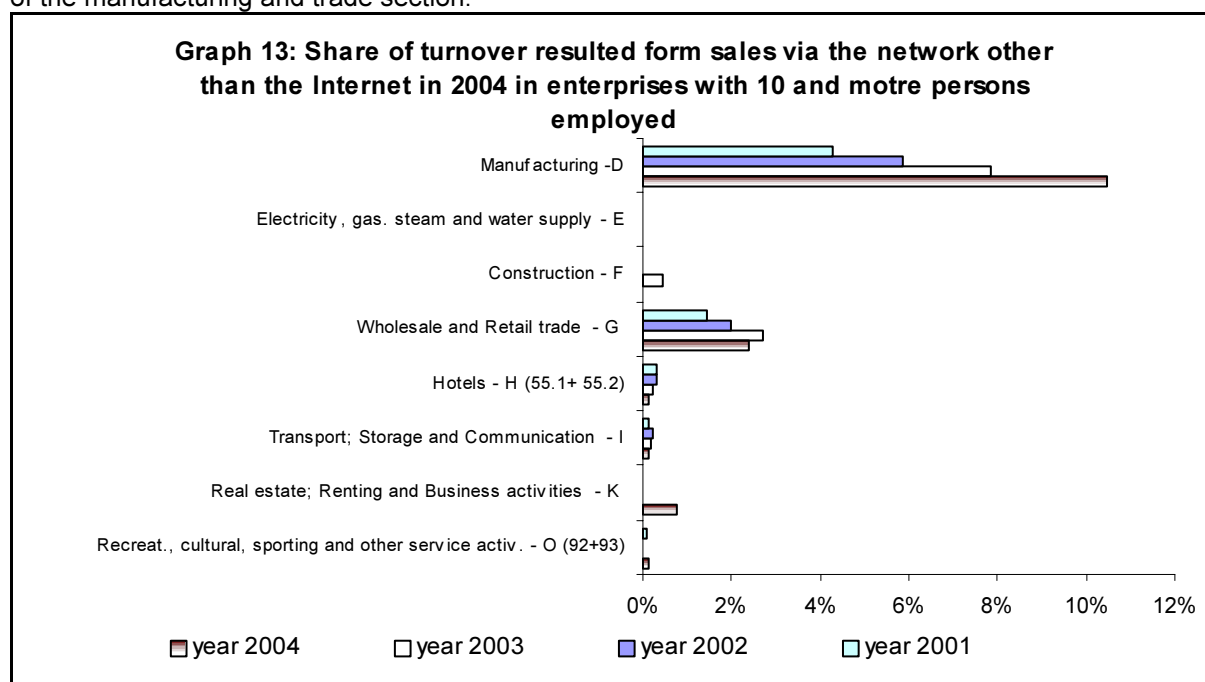
A value of purchases ordered via computer mediated networks of enterprises with 10 and more employees in 2004 reached 7,1% of total purchases and increased by 1 percent point.



A share of sales ordered via computer mediated networks in enterprises with 10 and more employees in 2004 reached 8,1% of total turnover and annual increase reached 2,4 percent point.



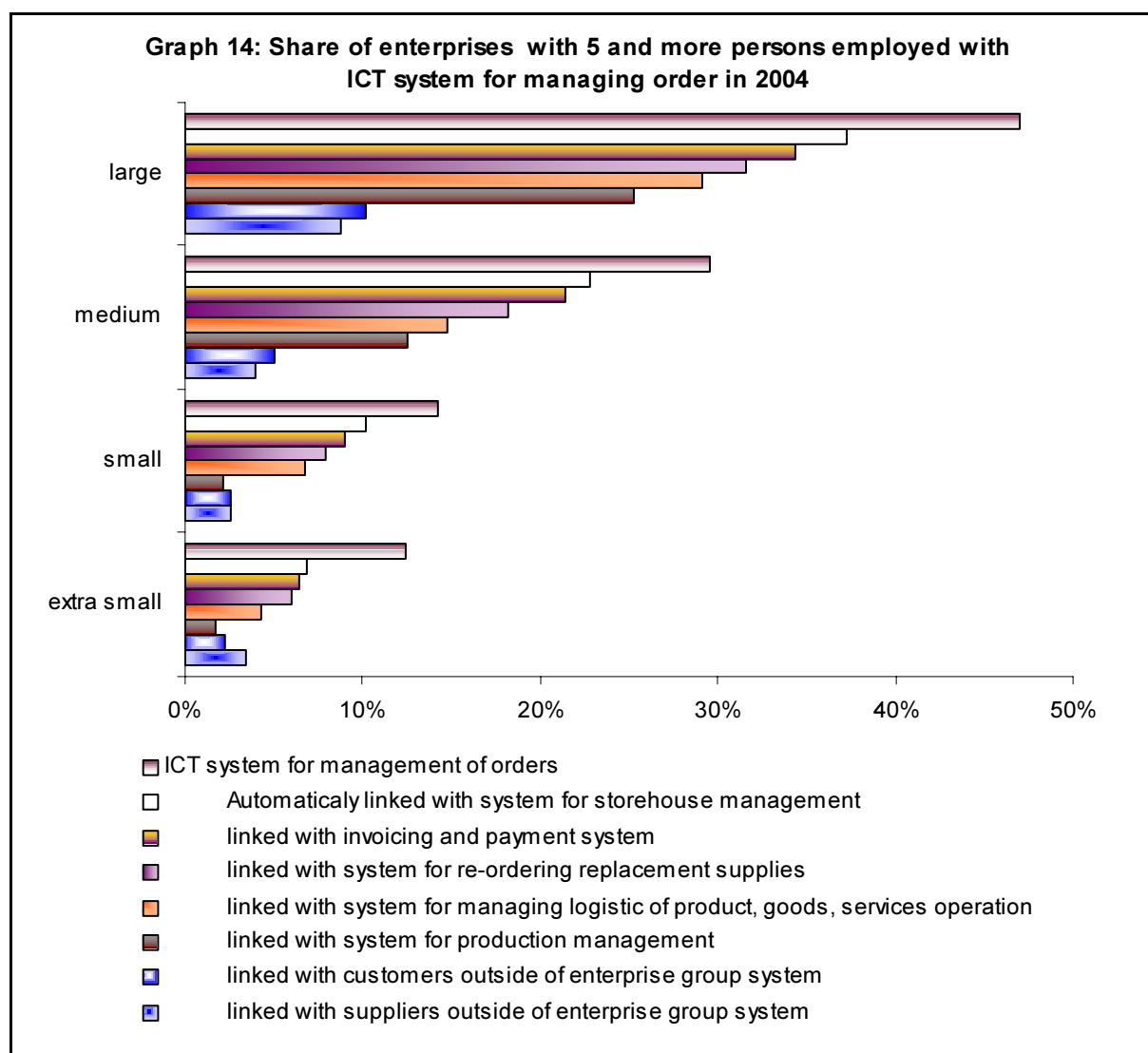
In 2004 3,2% of enterprises with 10 and more persons which means 1 220 enterprises with 10 and more persons employed used computer-mediated networks other than the Internet for electronic trading in selected branches of economic activity. The number of these enterprises grew up by 5% in relation to 2003. Trading via networks not using Internet protocols is used mostly by large enterprises of the manufacturing and trade section.



Value of purchases of these enterprises realised via computer-mediated networks not using the Internet protocol increased to 3,8 % of total purchases value, but year on year increase was only 0,2 percent point. Value of sales via networks other than the Internet was approximately 4,9 % of total turnover that represent one quarter growth. Enterprises using EDI for e-commerce are often unable to distinguish whether an access to the EDI application was via the Internet or via other networks or not.

4. IT systems for managing orders and their linkage with IT systems for other purposes

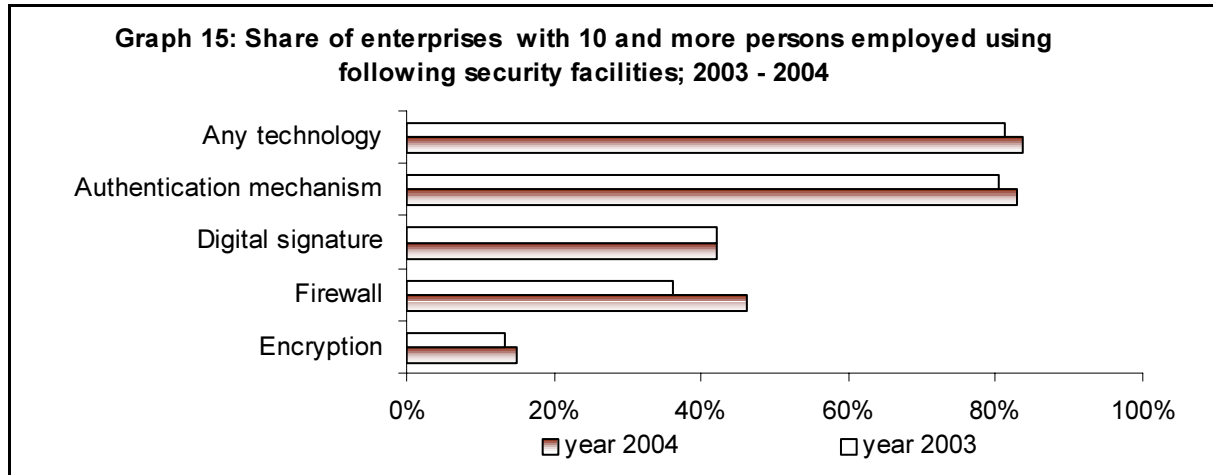
The survey comes also with results on linkage of IT systems for managing orders with other IT systems in 2004. Linkage of system provides sharing of data or other automatic transport of data between IT systems that could be realized on-line or by the help of automated batches.



This increase seems to be too high and together with large share of these enterprise leads to conclusion that the result includes significant systematic error

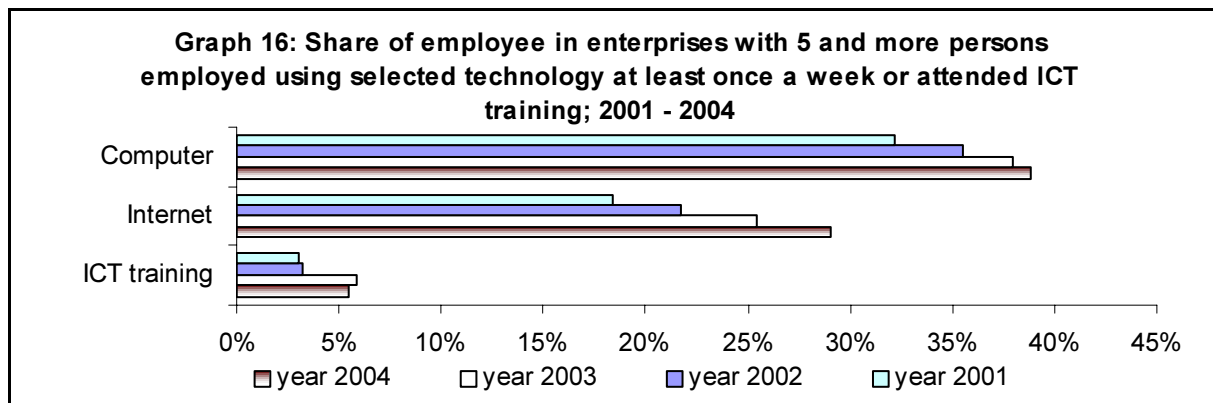
5. Security of IT systems

Safety Security of ICT is one of the limiting factors of ICT usage from the point of view of subjective feelings and potential financial cost of remedy losses caused due to failure of information system or due to encroachment to its performance respectively.



83,6 % of total number of enterprises with 10 and more persons employed was using some of the security facilities in 2004. Most of them, nearly 99 %, are using virus checking or protection software. The share of enterprises encountering computer virus, trojan or worm attack or unauthorised access to computer system or data on number of enterprises using some of security facilities has dramatically decreased

6. Technology used by employees

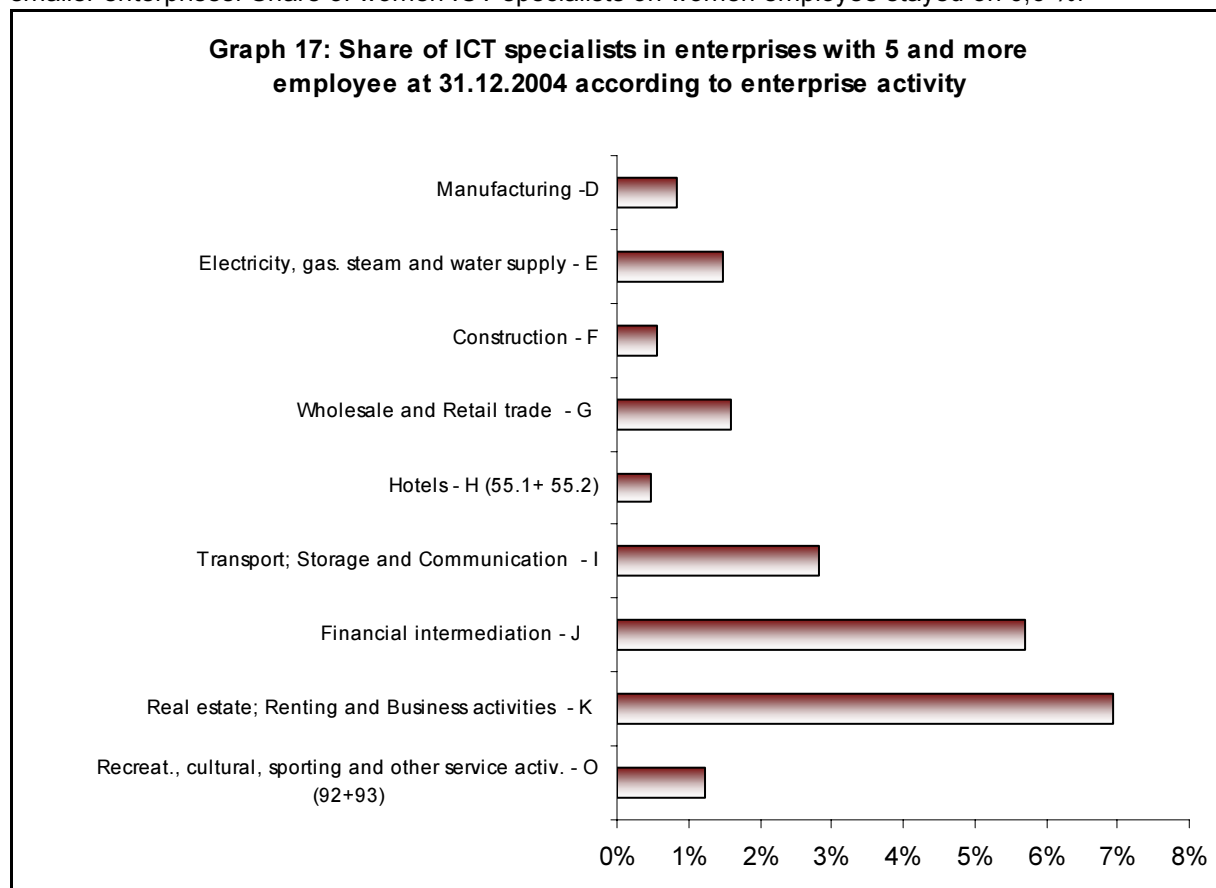


* In 2001, 2002 data for 10 and more employees

There was 981 thousand employees using computer for work at least once a week in selected enterprises with 5 and more persons employed at the end of 2004, it was about 38,8 % of total number of employees. This number grew up less by 0,9 percent point on year-to-year comparison. Highest share of employees using computer was reported in section of financial intermediation. More than 443 thousand women employee used computer and the share on total number of women employee was approximately 43,2 %.

A number of employees with access to E-mail increased only just a little to 771 thousand employees and their share was 30,5 %. Share of employees having access to Internet web sites grew up by 4 percent points.

The share of ICT specialists enabling ICT usage to other employees on total number of employees in enterprises with 10 and more employees was 2 % and their share was slightly higher in smaller enterprises. Share of women ICT specialists on women employee stayed on 0,6 %.



In 2004 share of employees engaged in home-teleworking was 0,5 %. Share of women employee engaged in home-teleworking on total number of women employee was rated only 0,4 %.

In 2004 approximately 138 thousand of employees attended ICT training and it is 5,5 % of total number of employees. In enterprises with 10 and more employees this share has reached 5,7 % and interannually was slightly lower than the previous year value. This share rises with size of enterprises. Percentage of women employee having attended ICT training was by 0,6 percent point higher then it corresponds to the equivalent of one for employees.