

### Recent developments in the EU survey on ICT usage and e-commerce in enterprises

UNCTAD Working Group on Measuring E-Commerce and the Digital Economy, 3-4 May 2021

Magdalena KAMIŃSKA

EUROSTAT, Unit G4 – Innovation and digitalisation

### Outline of the presentation

- Background Community survey on ICT usage and e-commerce in enterprises
- Recent developments in the EU ICT ENT survey
  - Artificial Intelligence (AI)
  - Internet of Things (IoT)
  - Cloud computing (CC)
  - Covid-19 impact
  - ICT security
  - Use of robotics
  - ICT environmental impact
  - Big Data under revision



### Background – Survey design process

- Annual revisions of the questionnaire and the annual implementing regulation:
  - Policy needs
  - Technology developments
  - Constant quality improvements
  - Cooperation with EU MS and the users
    - Users consultation + 2 Working Groups + 2 Task Force meetings
- Goal: harmonisation across EU Member States
- Balance between relevance and keeping the time series
- Burden limitation (73 questions according to the EBS regulation)
- Data available at the end of the survey year



### Community survey on ICT usage and ecommerce in enterprises – scope

**Economic activity:** Enterprises classified in the following categories of NACE Rev. 2:

- Section C "Manufacturing";
- Section D "Electricity, gas, steam and air conditioning supply"
- Section E "Water supply, sewerage, waste management and remediation activities";
- Section F "Construction";
- Section G "Wholesale and retail trade; repair of motor vehicles and motorcycles";
- Section H "Transportation and storage";
- Section I "Accommodation and food service activities";
- Section J "Information and communication";
- Section L "Real estate activities";
- Section M "Professional, scientific and technical activities";
- Section N "Administrative and support service activities";
- Group 95.1 "Repair of computers and communication equipment"

Enterprise size: Enterprises with 10 or more employees or self-employed persons. Optional: enterprises with number of employees or self-employed persons between 0 and 9.

European Commission

### Al technologies uptake in EU-27 still low in 2020

Al uptake, EU-27, 2020

(% enterprises)



Source: Eurostat (online data code: isoc\_eb\_ai)

### AI index in EU-27 in 2020

Al Index, EU-27, 2020 (% enterprises)



Note: The results do not sum up to 100% due to figures with low reliability for some countries *Source:* Eurostat (online data code: isoc\_eb\_ai)



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- Dedicated module:
  - Use of AI technologies by enterprises (by type of technology) *filter question*
  - Use of AI by purpose (for marketing or sales, production processes, organisation or business administration processes, management of enterprises, logistics, ICT security, human resources management or recruiting)
  - Source of AI used (developed by own employees, commercial modified by own employees, open-source modified by own employees, commercial ready to use, external providers contracted to develop or modify)
  - Reasons for not using AI for non-users



- Use of interconnected devices or systems that can be monitored or remotely controlled via the internet (IoT) – *filter question*
- Use of IoT by purpose (for energy consumption management, premises' security, production processes, logistics management, condition-based maintenance, customer service, other purposes)



• The module was revised – more types of cloud services were included to cover more examples of the service models (SaaS, PaaS, IaaS)

D1.	<b>Does your enterprise buy any cloud computing services used over the internet?</b> (Please refer to the definition of cloud computing above, exclude free of charge services.) (Filter question)	Yes □	No □ -> go to <b>E1</b>
D2.	Does your enterprise buy any of the following cloud computing services used over the internet? (Please refer to the definition of cloud computing above, exclude free of charge services.)	Yes	No
	a) E-mail (as a cloud computing service)		
	b) Office software (e.g. word processors, spreadsheets etc.) (as a cloud computing service)		
	c) Finance or accounting software applications (as a cloud computing service)		
	d) Enterprise Resource Planning (ERP) software applications (as a cloud computing service)		
	e) Customer Relationship Management (CRM) software applications (as a cloud computing service)		
	f) Security software applications (e.g. antivirus program, network access control) (as a cloud computing service)		
	g) Hosting the enterprise's database(s) (as a cloud computing service)		
	h) Storage of files (as a cloud computing service)		
	i) Computing power to run the enterprise's own software (as a cloud computing service)		
	j) Computing platform providing a hosted environment for application development, testing or deployment (e.g. reusable software modules, application programming interfaces (APIs)) (as a cloud computing service)		



### Covid-19 impact questions in the EU ICT ENT survey

- Not foreseen event, thus not foreseen questions in the implementing regulation defining the scope of the EU surveys in 2020 nor in 2021
- Common acknowledgement of the importance to measure the impact of the pandemic and the relevance of digitalisation in its context
- Important to capture the momentum (no time to wait for the next survey/regulation)



common EU approach to measuring the impact of Covid-19

- Harmonised module introduced in 2021 survey
- Voluntary (16 MS expressed interest, some NOs: due to national questions / too late as national questionnaire has been finalised / other)
- Results by the end of 2021 / beginning of 2022



### Covid-19 impact questions in the EU ICT ENT survey

- Did enterprise increase the % of persons employed having remote access to the e-mail system of the enterprise, remote access to other ICT systems of the enterprise, number of remote meetings conducted – *filter question*
- Extent of Covid-19 impact on the above changes
- Did enterprise start or increase e-sales due to Covid-19 pandemic



- ICT security measures applied on enterprise's ICT systems *revised*
- Making persons employed aware of their obligations in ICT security related issues
- Having document(s) on measures, practices or procedures on ICT security
- Last definition or update of enterprise's document(s) on measures, practices or procedures on ICT security
- Experiencing any ICT related security incident leading to the following consequences
- Who carries out the ICT security related activities in the enterprise
- Having insurance against ICT security incidents



- Use of robots by type (industrial, service robots)
- Number of industrial and service robots used by the enterprise new, optional
- Reasons which influenced the decision to use robots by the enterprise new



# ICT & environment in the 2022 EU ICT ENT survey

- Measures applied to affect:
  - amount of paper used for printing and copying
  - energy consumption of the ICT equipment
- Consideration of environmental impact of ICT services, or ICT equipment when selecting them (e.g. energy consumption, etc.)
- Way of disposing of ICT equipment (e.g. computers, monitors, mobile phones) when it is no longer used



# Other new questions in the **2022** EU ICT ENT survey

- Meetings via the internet
  - Conduct of remote meetings
  - Having CT security guidelines for conducting remote meetings via the internet
  - Having guidelines to favour remote meetings via internet instead of business travelling
- Remote access
  - Persons employed have remote access to enterprise's resources (e-mail, documents, business applications or software)
  - Number of persons employed having remote access to the e-mail system of the enterprise
  - Number of persons employed have remote access to the documents, business applications or software of the enterprise
  - Having any ICT security guidelines for remote access



### Big Data in the 2023 EU ICT ENT survey

• The module is undergoing a revision





## Thank you



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- Fragmented approach questions on selected AI-based technologies embedded in different modules of the survey
  - Chatbots
  - Big data analytics
  - Robotics

A9.	Does your enterprise have the following chat service for customer contacts?	Yes	No
	a) A chat service where a person replies to customers		
	b) A chatbot or virtual agent replying to customers		



	Module E: Big data analysis		
	(Scope: enterprises with access to the internet, i.e. if A1>0)		
E1.	During 2019, did your enterprise perform big data analysis on any of the following data sources? (Please exclude big data analysis conducted by external service providers)	Yes	No
	a) Data from smart devices or sensors (e.g. Machine to Machine -M2M- communications, digital sensors, Radio frequency identification tags RFID, etc.) (in the context of big data)		
	b) Geolocation data from the use of portable devices (e.g. portable devices using mobile telephone networks, wireless connections or GPS) (in the context of big data)		
	c) Data generated from social media (e.g. social networks, blogs, multimedia content sharing websites, etc.) (in the context of big data)		
	d) Other big data sources not specified above, e.g. stock index data, transaction data, other open web data.		
f at least or	ne "yes" in E1a)-d) then go to E2.	т	
E2.	During 2019 did your enterprise use any of the following methods to analyse big data?	Yes	No
	a) Machine Learning (e.g. deep learning) Machine learning (e.g. deep learning) involves 'training' a computer model to better perform an automated task, e.g. pattern recognition.		
	b) Natural language processing, natural language generation or speech recognition NLP, NLG and speech recognition is the ability for a computer program to understand human language as it is spoken, to convert data into natural language representation or to identify words and phrases in spoken language and convert them to a machine-readable format.		
	c) Other methods of big data analysis		



#### Module I: Use of robotics

•	An industrial robot is an automatically controlled, reprogrammable, multipurpose manipulator programmable in three or more axes, which may be either
	fixed in place or mobile for use. Most existing industrial robots are based on the robot arm with a solid base and a series of links and joints with an end
	effector that carries out the task.

 A <u>service robot</u> is a machine that has a degree of <u>autonomy</u> that enables it to operate in complex and dynamic environment that may require interaction with persons, objects or other devices, excluding its use in industrial automation applications. They are designed to fit their tasks, working in the air (e.g. as a drone), under water, or on land, using wheels or legs to achieve mobility with arms and end effectors to physically interact and are often used in inspection and maintenance tasks.

Software robots (computer programs) and <u>3D printers</u> are out of the scope of the following questions.

11.	Does your enterprise use any of the following types of robots? (Filter question)	Yes	No
	a) Industrial robots (e.g. robotic welding, laser cutting, spray painting, etc.) (Please see the definition of <u>industrial</u> robots)		
	b) <b>Service robots</b> (e.g. used for surveillance, cleaning, transportation, etc.) (Please see the definition of <u>service</u> robots)		



#### Dedicated module

#### Module F: Artificial Intelligence

(Scope: enterprises with access to the internet, i.e. if A1>0)

Artificial intelligence refers to systems that use technologies such as: **text mining, computer vision, speech recognition, natural language generation, machine learning, deep learning** to gather and/or use data to predict, recommend or decide, with varying levels of autonomy, the best action to achieve specific goals.

Artificial intelligence systems can be purely software based, e.g.:

- chatbots and business virtual assistants based on natural language processing;
- face recognition systems based on computer vision or speech recognition systems;
- machine translation software;
- data analysis based on machine learning, etc.;

#### or embedded in devices, e.g.:

- autonomous robots for warehouse automation or production assembly works;
- autonomous drones for production surveillance or parcel handling, etc.



	Does your enterprise use any of the following Artificial Intelligence technologies?	Use of AI technologies, <i>filter question</i>	es,	
F1.			Yes	No
	a) Technologies performing analysis of written language (text mining)			
	b) Technologies converting spoken language into machine-readable format (speech recogn	ition)		
	c) Technologies generating written or spoken language (natural language generation)			
	d) Technologies identifying objects or persons based on images (image recognition, image	processing)		
	e) Machine learning (e.g. deep learning) for data analysis			
	f) Technologies automating different workflows or assisting in decision making (Artificial Interprocess automation)	elligence based software robotic		
	g) Technologies enabling physical movement of machines via autonomous decisions based (autonomous robots, self-driving vehicles, autonomous drones)	I on observation of surroundings		

If F1 a) to g) = "No" then go to F4 (if optional included) else go to X1



F2.

Does your enterprise use Artificial Intelligence software or systems for any of the following purposes?	Yes	No
<ul> <li>a) for marketing or sales, e.g.:</li> <li>chatbots based on natural language processing for customer support,</li> </ul>		
• customer profiling, price optimisation, personalised marketing offers, market analysis based on machine learning, etc.		
b) for production processes, e.g.:		
<ul> <li>predictive maintenance based on machine learning,</li> <li>tools to classify products or find defects in products based on computer vision,</li> <li>autonomous drones for production surveillance, security or inspection tasks,</li> <li>assembly works performed by autonomous robots, etc.</li> </ul>		
c) for organisation of business administration processes, e.g.:		
<ul> <li>business virtual assistants based on machine learning and/or natural language processing,</li> <li>voice to text conversion based on speech recognition for document drafting,</li> <li>automated planning or scheduling based on machine learning,</li> <li>machine translation, etc.</li> </ul>		
d) for management of enterprises, e.g.:		
<ul> <li>machine learning to analyse data and help make investment or other decisions,</li> <li>sales or business forecasting based on machine learning,</li> <li>risk assessment based on machine learning, etc.</li> </ul>		
e) for logistics, e.g.:		
<ul> <li>autonomous robots for pick-and-pack solutions in warehouses,</li> <li>route optimization based on machine learning,</li> <li>autonomous robots for parcel shipping, tracing, distribution and sorting,</li> <li>autonomous drones for parcel delivery, etc.</li> </ul>		
f) for ICT security, e.g.:		
<ul> <li>face recognition based on computer vision for authentication of ICT users,</li> <li>detection and prevention of cyber-attacks based on machine learning, etc.</li> </ul>		
g) for human resources management or recruiting, e.g.:		
<ul> <li>candidates pre-selection screening, automation of recruiting based on machine learning,</li> <li>employee profiling or performance analysis based on machine learning,</li> <li>chatbots based on natural language processing for recruiting or supporting human resources management, etc.</li> </ul>		

Purpose of AI use, for users



Source of AI used, for

users

F3.	How did you enterprise acquire the Artificial Intelligence software or systems that it uses? - Optional	Yes	No
	a) They were developed by own employees (including those employed in parent or affiliate enterprise)		
	b) Commercial software or systems were modified by own employees (including those employed in parent or affiliate enterprise)		
	c) Open-source software or systems were modified by own employees (including those employed in parent or affiliate enterprise)		
	d) Commercial software or systems ready to use were purchased (including examples where it was already incorporated in a purchased item or system)		
	e) External providers were contracted to develop or modify them		



Reasons for not using AI, for *non-users* 

Questions F4 and F5 are presented only to respondents who answered 'No' to F1a)-g) i.e. enterprises that did not use any of the Artificial Intelligence technologies listed in question F1.

F4.	Has your enterprise ever considered using any of the Artificial Intelligence technologies listed in question F1? – Optional (Filter question)	Yes □	<b>No</b> □ -> go to <b>X1</b>
F5.	What are the reasons for your enterprise not to use any of the Artificial Intelligence technologies listed in question F1? – Optional	Yes	No
	a) The costs seem too high		
	b) There is a lack of relevant expertise in the enterprise		
	c) Incompatibility with existing equipment, software or systems		
	d) Difficulties with availability or quality of the necessary data		
	e) Concerns regarding violation of data protection and privacy		
	f) Lack of clarity about the legal consequences (e.g. liability in case of damage caused by the use of Artificial Intelligence)		
	g) Ethical considerations		
	h) Artificial Intelligence technologies are not useful for the enterprise		



#### **Module E: Internet of Things**

(Scope: enterprises with access to the internet, i.e. if A1>0)

The Internet of Things (IoT) refers to interconnected devices or systems, often called "**smart**" devices or systems. They collect and exchange data and can be monitored or remotely controlled via the internet.

Examples are:

- "smart"-meters, -thermostats, -lamps (lights), -alarm systems, -smoke detectors, -door locks,
- -cameras;
- sensors, RFID tags connected to a base station that allows them to be managed via the internet.

Please exclude plain detection and sensors (e.g. motion, sound, temperature, smoke, etc.) and RFID tags that **cannot** be monitored or remotely controlled via the internet).

Internet of Things may include various types of network connections via WAN, WiFi, LAN, Bluetooth, ZigBee, Virtual Private Networks (VPN) etc.



		Use of IoT, <i>filter question</i>		
E1.	Does your enterprise use interconnected devices or system can be monitored or remotely controlled via the internet (Int of Things)?	ns that ternet	Yes □	No □ ->go to <b>F1</b>
	(Filter question)			-



_	F	Purpose of IoT use		use
E2.	Does your enterprise use interconnected devices or systems that can be monitored remotely controlled via the internet (Internet of Things) for any of the following?	lor	Yes	No
	a) for energy consumption management (e.g. "smart"-meters, -thermostats, -lamps (lights	))		
	b) for premises' security (e.g. "smart" -alarm systems, -smoke detectors, -door locks, -sec cameras)	curity		
	c) for production processes (e.g. sensors or RFID tags that are monitored/controlled via the internet and used to monitor or automate the process)	ne		
	d) for logistics management (e.g. sensors monitored/controlled via the internet for tracking products or vehicles in warehouse management)	]		
	e) for condition-based maintenance (e.g. sensors monitored/controlled via the internet to maintenance needs of machines or vehicles)	monitor		
	f) for customer service (e.g. "smart" cameras or sensors monitored/controlled via the inte monitor customers' activities or offer them a personalised shopping experience)	rnet to		
	g) for other purposes			



### Covid-19 impact questions in the 2021 survey





### Covid-19 impact questions in the 2021 survey

Extent of Covid-19 impact

2. To what degree were these changes due to the covid-19 pandemic? (via computers or mobile phones)	Fully	Partly	Not at all
<i>(If 1a)=yes)</i> a) in the remote access to the e-mail system of the enterprise			
<ul><li>(If 1b) =yes)</li><li>b) in the remote access the ICT systems of the enterprise other than e-mail</li></ul>			
<ul> <li>(If 1c) =yes)</li> <li>c) in number of remote meetings conducted by the enterprise</li> </ul>			



### Covid-19 impact questions in the 2021 survey





D1.	Does your enterprise apply any of the following ICT security measures on its ICT systems?	Yes	No
	a) authentication via <b>strong password</b> (e.g. minimum length, use of numbers and special characters, changed periodically, etc.)		
	b) authentication via <b>biometric methods</b> used to access the enterprise's ICT system (e.g. authentication based on fingerprints, voice, face)		
	<ul> <li>c) authentication based on a combination of at least two authentication mechanisms</li> <li>(i.e. combination of e.g. user-defined password, one-time password (OTP), code generated via a security</li> <li>token or received via a smartphone, biometric method (e.g. based on fingerprints, voice, face))</li> </ul>		
	d) Encryption of data, documents or e-mails		
	e) Data backup to a separate location (including backup to the cloud)		
	f) Network access control (management of user rights in enterprise's network)		
	<ul> <li>g) VPN</li> <li>(Virtual Private Network extends a private network across a public network to enable secure exchange of data over public network)</li> </ul>		
	<ul> <li>h) ICT security monitoring system that allows to detect suspicious activity in the ICT systems and alerts the enterprise about it, other than standalone anti-virus software</li> </ul>		
	i) Maintaining log files that enable analysis after ICT security incidents		
	<ul> <li>j) ICT risk assessment, i.e. periodical assessment of probability and consequences of ICT security incidents</li> </ul>		
	<ul> <li>k) ICT security tests (e.g. performing penetration tests, testing security alert system, review of security measures, testing of backup systems)</li> </ul>		



D2.	Does your enterprise make persons employed aware of their obligations in ICT security related issues in the following ways?         a) Voluntary training or internally available information (e.g. information on the intranet)		No
	b) Compulsory training courses or viewing compulsory material		
	c) By contract (e.g. contract of employment)		



D3.	Does your enterprise have document(s) on measures, practices or procedures on ICT security? (Filter question) (Documents on ICT security and confidentiality of data cover employee training in ICT use, ICT security measures, the evaluation of ICT security measures, plans for updating ICT security documents, etc.)	Yes □	No □ ->go to D5
D4.	When were your enterprise's document(s) on measures, practices or procedures on ICT security, defined or most recently reviewed?		
	(Documents on ICT security and confidentiality of data cover employee training in ICT use, ICT security measures, the evaluation of ICT security measures, plans for updating ICT security documents, etc.)		
	(Tick only one)		
	a) within the last 12 months		
	b) more than 12 months and up to 24 months ago		
	c) more than 24 months ago		



D5.	During 2021, did your enterprise experience any ICT related security incident leading to the following consequences?	Yes	No
	a) Unavailability of ICT services due to hardware or software failures		
	b) Unavailability of ICT services due to attack from outside, e.g. ransomware attacks, Denial of Service attacks		
	c) Destruction or corruption of data due to hardware or software failures		
	d) Destruction or corruption of data due to infection of malicious software or unauthorised intrusion		
	e) Disclosure of confidential data due to intrusion, pharming, phishing attack, intentional actions by own employees		
	f) Disclosure of confidential data due to unintentional actions by own employees		



D6.	Who carries out the ICT security related activities (e.g. security testing, ICT training on security, resolving ICT security incidents) in your enterprise? Exclude upgrades of pre-packaged software	Yes	No
	a) own employees (incl. those employed in parent or affiliate enterprises)		
	b) external suppliers		

D7.	Does your enterprise have insurance against ICT security incidents?	Yes	No



E1.	Does your enterprise use any of the following types of robots? (Filter question)	Yes	No
	a) <b>Industrial robots</b> (e.g. robotic welding, laser cutting, spray painting, etc.) An industrial robot is an automatically controlled, reprogrammable, multipurpose manipulator programmable in three or more axes, which may be either fixed in place or mobile for use. Most of industrial robots are based on a robotic arm and a series of links and joints with an end effector that carries out the task. <u>Do not include CNC-machines, 3D printers and devices that are fully controlled by an operator.</u>		
	<ul> <li>b) Service robots (e.g. used for surveillance, cleaning, transportation, etc.) A service robot has a degree of autonomy and can operate in complex and dynamic environments that may require interaction with persons, objects or other devices. They use wheels or legs to achieve mobility and are often used in inspection, transport or maintenance tasks. Examples are: autonomous guided vehicles, inspection and maintenance robots, cleaning robots, etc. <u>Do not include software robots.</u> </li> </ul>		



#### E2. Please indicate the number of <u>industrial and</u> <u>service robots</u> used by the enterprise

#### - Optional

Please count each individual robot separately in cases where they are integrated into a production line (e.g. one robotic arm counts as one robot).

*If you cannot provide the exact number, an approximation will suffice* 





E3.	Please indicate if the following reasons influenced the decision to use robots in your enterprise:	Yes	No
	a) High cost of labour		
	b) Difficulties to recruit personnel		
	c) To enhance safety at work		
	<ul> <li>d) To ensure high precision or standardized quality of processes and/or goods and services produced</li> </ul>		
	e) To expand the range of goods produced or services provided by the enterprise		
	f) Tax or other government incentives		



### ICT & environment in the **2022** EU ICT ENT survey

F1.	Does your enterprise apply any measures to affect the following?	Yes	No
	a) Amount of paper used for printing and copying		
	b) Energy consumption of the ICT equipment		

F2.	Does your enterprise consider environmental impact of ICT services, or ICT equipment when selecting them (e.g. energy	Yes	No
	consumption, etc.)?		



## ICT & environment in the 2022 EU ICT ENT survey

F3.	What does your enterprise do with ICT equipment (e.g. computers, monitors, mobile phones) when it is no longer used?	Yes	No
	<ul> <li>a) It is disposed of in electronic waste collection/recycling (incl. leaving it to the retailer to dispose of)</li> </ul>		
	b) The ICT equipment is kept in the enterprise (e.g. to be used as spare parts, fear of sensitive information being disclosed)		
	c) It is sold, returned to a leasing enterprise, or donated		



## Remote meetings in the **2022** EU ICT ENT survey

A5.	Does your enterprise conduct remote meetings (via e.g. Skype, Zoom,	Yes	No
MS Teams, WebEx, etc.)?			□ -> go to A8
A6.	A6. Does your enterprise have any ICT security guidelines for conducting remote meetings via the internet (e.g. password requirement, end-to-end encryption)?	Yes	No

A7.	A7. Does your enterprise have guidelines to favour remote meetings via internet instead of business travelling?	Yes	No



A8.	Do any of the persons employed have remote access to the following? (via computers or portable devices such as smartphones)	Yes	No
	a) E-mail system of the enterprise		
	b) Documents of the enterprise (e.g. files, spreadsheets, presentations, charts, photos)		
	c) Business applications or software of the enterprise (e.g. access to accounting, sales, orders, CRM) Please exclude applications used for internal communication, e.g. Skype, Teams, Yammer		



#### If YES to A8a then go to A9

A9.	How many persons employed have remote access to the e-mail system of the enterprise?	
	(via computers or portable devices such as smartphones)	(Number)
	If you can't provide this value,	
	please indicate the percentage of all persons employed who have remote access to the e-mail system of the enterprise	%



#### If YES to A8b or A8c then go to A10





A11.	Does your enterprise have any ICT security guidelines for remote access? (e.g. requirement to conduct password–secured remote meetings, prohibition of using of public Wi-Fi for work, use of VPN, requirements	Yes □	No □
	concerning privacy of data)		

