



Generalitat de Catalunya
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Second Member States's Study of the markets for electronic information services in the European Economic Area (MSStudy II)

Spain: 1997/98

Final report

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Prepared by:

Institut d'Estadística de Catalunya
Via Laietana, 58
08003 Barcelona (Spain)

Tel.: +34-934 120 088
Fax: 934 123 145

<http://www.idescat.es>

AUTHORS OF THIS STUDY:

- Project direction and writer of the final report:
Tomàs Baiget, *Assistència Tècnica Estadística (ATE), Idescat.*
- Statistical data processing, tabulations and ofimatic advice:
Julia Urrutia, *ATE, Idescat.*
- Technical direction of the CATI operation (telephone interviews):
Cecilia Fernández, *Estratel.*
- Administrative tasks:
Maria Alba, *Idescat.*
- Reprography and mailings:
Francesc Nogueras, *Difusió, Idescat.*
- General supervisor:
Josep Casco, *Subdirector, ATE, Idescat.*

The authors want to acknowledge the assessments given by:

Josep M^a Bas and Cèlia Gomà,
Estadístiques Econòmiques, Idescat,

Vicenç Meléndez, *ATE, Idescat.*

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Part I. Supply Side

The objective of this part of MSStudy II is to provide an overview of the electronic information providers active in Spain in 1997, with some estimations of the 1998 figures.

Following the methodology proposed by the *Support and Aggregation Team*, consensuated by all MSStudy partners, the information market has been measured from two standpoints:

- National **market** or consumption (see chapter 2.2.1.).
- National **industry** production (see chapter 2.2.2.).

Under the **market approach** there have been taken into account the data of all the companies, national and foreign, operating (i. e., selling information) in Spain. Imports into Spain are included and Spanish exports have been excluded. The results show the information consumption in the country.

Under the **industry approach** only data of the national companies owned by Spanish investors by more than 50% have been considered. The headquarters principle applies here: a company whose headquarter is located in another country is considered to be a foreign company and their sales in Spain are accounted as imports (i. e., not taken into account here under the industry approach) even in the case that the information is in Spanish, produced in Spain and sold to Spanish users. Spanish exports are included.

To sum up:

Market approach

Spanish production - exports + imports

Industry approach

Production of the Spanish owned companies only, including exports. Foreign companies' sales in Spain are ignored.

In the next chapters we are presenting the methodology and the main results related to the market approach of 1997. The reader should look at the four sets of tables (Market 97, Industry 97, Market 98 and Industry 98) at the end of this part which provide more detailed data.

2.1. Methodology

a) 850 questionnaires were sent before summer 1998 to companies **potentially** in the scope of MSStudy II. The mailing list was made out of own internal database (which has *I*M Guide's* record format), Spanish ISBN database, Internet Services Providers list taken from *RedIris* (the Spanish NIC), publishers, book and software fair catalogues, etc.). The criterium for doing the mailing was the exhaustivity, i. e., we tried to gather all the companies that could produce electronic information products and services, and we decided to include their data or not afterwards of having received the questionnaires.

b) We got some answers but we had to repeat the mailing of about 810 questionnaires after summer. In order to make some "pressure" on the respondents we red stamped the first page of the questionnaires: "SECOND MAILING. URGENT ANSWER IS REQUIRED". This showed to be quite effective.

c) During 6 days three people claimed the questionnaires through the telephone. We had to post again 35 and to fax 66 questionnaires (101 in total) because strangely "they had been lost somewhere".

d) We used *SABE (Sistema de Análisis de Balances Españoles)*, a cd-rom produced by the Spanish company *Informa* with data from *Registro Mercantil* (Companies Register) and other sources, where we had the total sales figure of most of the companies (at least the big ones).

We also got a second cd-rom directory very known in Spain, *Dicodi*, published by *Incresa* (currently a company part of the *Asnef/Equifax* group).

e) With the cd-roms we could carry out company rankings and to identify the main ones (and discovering new ones as well) in order to set the priorities in the research, seeking for the bigger companies. Both CNAE codes (National classification of economic activities) and the enterprises activities description were complementary for searching and none of them alone were reliable enough.

f) Having the total sales figure of each company it was easier to get an answer from their senior staff about the detachment of their activities (electronic, print,

entertainment, software...). In many cases we only got estimates, not exact figures, because usually the accountancy of the companies is not based on the type of media.

g) Finally we got 232 questionnaires, many of them fulfilled by ourselves with data given to us through the telephone or estimated in consultation with various experts. This selection was done afterwards we had analysed carefully all the answers and had made many telephone enquiries. Therefore we found $850 - 232 = 618$ companies not relevant to MSStudy. The rejections were due mainly to: change of activity, information given for free, and not producing information (only software or services).

When data are confidential, as they are in some cases "following strict rules or policy of the company", the telephone is almost the only way to obtain figures from people. The facts that *Asedie* (*Asociación Multisectorial de la Información*) --our partner in sending the questionnaires and other tasks-- is a respectable and well known association; *Institut d'Estadística de Catalunya* is an official body of the public administration; and that we invoked that our Statistics Law includes the obligation of the confidentiality were not enough to overcome the susceptibilities. Also, a direct telephone call could counteract the general unwillingness and the reluctance of people to fulfil questionnaires.

2.1.1. Response rates by type of supplier, market segment (in number of respondents and representativity of market volume)

See Table 1.

General remark:

The column "Other suppliers" of this and all other tables are filled with zeros because we did not get information on other suppliers types different from those already considered.

AUDIOTEX

One provider type existing in other countries is audiotex, but in Spain it seems quite clear that there are not any professional audiotex paid services.

Most are free of charge public administration or company information services ("900" telephone numbers, equivalent to "800" in most of the other countries), but many are human operated (not audiotex).

Also there are premium rate shared payment services (902) --part of the income is taken by the telephone operator and the other part is delivered by the operator to the information or service provider--, most private, many human operated as well.

There are other premium rate telephone numbers: 903 --general-, and 906 --most erotic-. Theoretically in these number series there should be some service under our scope, but there are not any directories available.

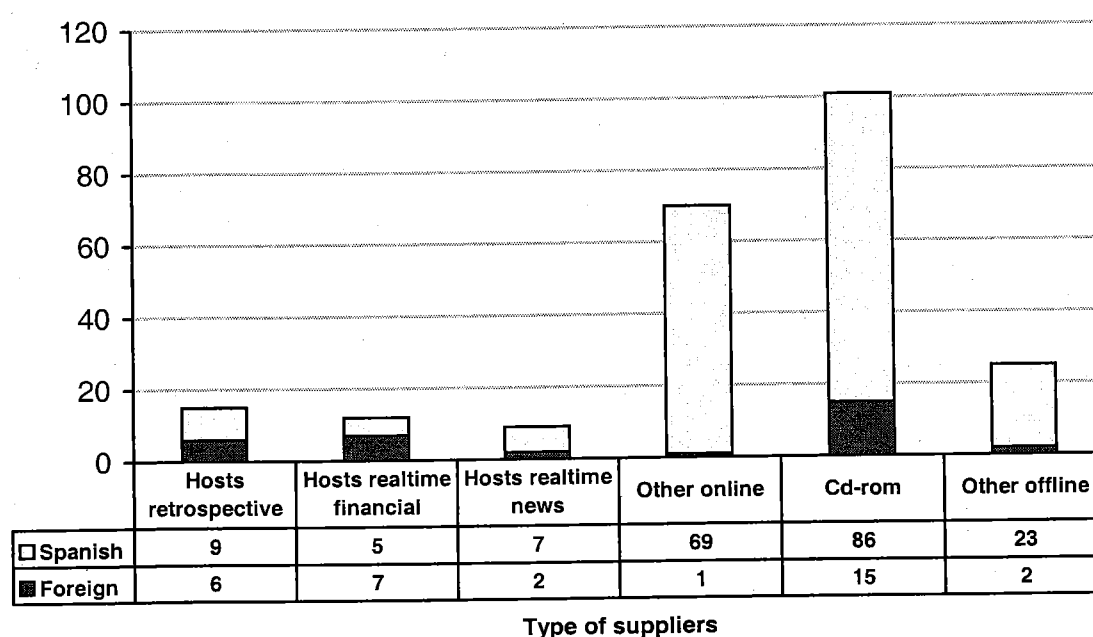
Again, *Telefónica* refused to give us any figures in spite of having asked them the data with an official letter. *Telefónica's* position is very closed afterwards some erotic usage scandals appeared in the newspapers some years ago. Currently they argue "confidentiality reasons due to the competitiveness of the market".

At that time existed two audiotex providers associations, but both were dismantled.

Therefore we have not any information sources nor any estimations because we received zero answers about these services through our questionnaires.

Our conclusion is that the audiotex market figures are negligible, except for erotic services (but in any cases it is almost impossible to know from desk research which are human operated and which are real audiotex). It has to be taken into account also that some of these suppliers operate with foreign telephone numbers and national numbers re-addressed to foreign ones.

Number of suppliers



Note:

Under the "foreign" category are included also 12 former Spanish companies bought or participated more than 50% by foreign investors.

Definitions of types of suppliers

Hosts retrospective

Online information services delivering information from retrospective databases which may contain different kind of data (reference, factual, numeric data, full-text, images, etc.) in a number of subject areas (news, financial and business data, scientific and technical information, legal information, etc.) for a number of retrospective time spans or time periods (also sometimes called "archival database services").

Hosts realtime financial

Electronic information is delivered in maximal 20 minutes afterwards the "event" in the financial and stock exchange area (financial services). Only the information sales are

taken into account (percentages or commercial commissions over the transactions are excluded). As it is known, "realtime" means that the information is received quickly enough to potentially influence or allow a particular process (in this case an economic operation).

Hosts realtime news

The realtime concept has been extended to include the information services that update their information at least daily. In this category are included newswire services mainly.

Other online distributors

- VIDEOTEX

We did not get any data about videotex (still installed and operated by *Telefónica* but currently totally empty of services, June 1999).

In 1997 still there were some videotex professional services but *Telefónica* did not want to give us any figures. We did not get any answers from the questionnaires as well. We deduct that the usage was very low. Only there were some erotic services live.

All Spanish videotex services have closed down or migrated to the web.

- INTERNET SERVICES PROVIDERS (ISPs)

This is an important, dynamic but fuzzy market segment quite difficult to allocate in this basically "information content" oriented MSSStudy. Most of the ISPs began as simple internet access providers, but later they provided e-mail services, discussion lists, design and web hosting, and what is most important they add value to their services offering a variety of information sources, searching tools, etc.

Not all the companies officially registered as ISPs are operating as such, open to the general public. Many of them are simply big companies offering internet access to their employees and/or customers (ex., banks).

There is a lot of competition in Spain among those operating as real ISPs. Some of them have had some success and some have been bought by telecom companies and investment groups.

Currently they begin to get a noticeable amount of revenues through their advertising activity.

Therefore this is a segment with an important expansion rate and we considered that its "information content" part should be taken into account in MSSStudy, in spite that most of the information services are (still) given for free. It is clear that there are a lot of long-term investments in these enterprises, but what is important is the fact that they already are recovering part of their money.

We have had an important response rate of the ISPs to our questionnaires and afterwards having carefully read them, their brochures and accessed to their webs, we decided to include an estimated part of their sales in MSSStudy. Obviously each case was analysed individually and in case of doubt companies were contacted through a

telephone call. It is amazing to realise how differently the term "electronic information" is interpreted by the various companies with software or telecommunications knowledge background.

- SEARCH ENGINES, ROBOTS, PORTALS, ONLINE NEWSPAPERS

Many things that were said above could apply to this group as well.

We have received a number of questionnaires that gave us a picture of their activities. Also we have taken the "hits" rankings published by the *Oficina de Justificación de la Difusión (OJD)* [an organization that audits the printing runs of newspapers and journals, and currently carries out the equivalent task with webs]:
<http://www.ojd.es>

Many of the above companies are offering information for free, but most of them are having quite a sound income because of advertising. Some newspapers are studying the possibility to charge for having access to them in a near future. We have included in MSStudy the current amounts earned by these companies, considering that the information is not free but paid by the advertisers.

Cd-rom distributors

In this category we have included both producers and distributors of cd-roms and DVDs, trying to avoid double counting. Original sources (producers) have been prioritized in most cases, but also market data given by distributors resulted invaluable for ranking companies.

The high number of companies is explained by the noticeable amount of publishers that have some activity in this area (although in general it is still relatively small).

Other offline distributors

Here are included the companies that supply their information mainly in diskette or in other "offline" non cd-rom devices (tape, streamers...). We can find under this category producers of geographical information systems (GIS), as well as some firms carrying out SDIs or alert services.

2.1.2. Characterisation of respondents by type, size and market shares

The Table 2 foreseen in the original methodology manual is not provided here, as it is not applicable in our case.

As it was said, we got 232 formally fulfilled and revised questionnaires in total (199 Spanish and 33 foreign companies), that we think are representative of the full sector.

We believe that this is quite a good census of all the companies selling electronic information services (EIS) in Spain, but the market has become so complicated that it is very difficult to judge whether or not to include in this study companies that almost do not produce contents (they mainly stamp cd-roms), produce or import games, software, animation / cartoons / infography...

Some information products appear as being nominally produced by a public institution or by a small company in one city, but really the production has been outsourced totally or in part to other companies in other places.

I. e., there is a mixture of organisations that publish products fully or partly outsourced, subsidised, sold at cost, sold for profit, as an advertising channel, to add value to existing printed works or just for accompanying them as a marketing tool.

We got 103 further answers to our mailings (letters, e-mails, incomplete questionnaires...) stating phrases like "our organization does not sell electronic information", "our business falls out of the scope of your study", "the electronic information is provided to our clients (or members) free of charge". In most cases we could not rely on the correctness of these statements and called them to ascertain about the real activities of the organization.

To decide whether or not to include these companies we tried to follow carefully the methodology and the criteria agreed for MSStudy II (developed by the *Institute for Information Economics* and *Infratest Burke*, Germany), but not without many doubts due to the fact that the casuistry is very ample.

The missing data from companies (those that did not answer the questionnaire) were estimated through various experts interviews, very diverse, which allowed us to rank the company according their sales in Spain. Also an invaluable help was received from the Support and Aggregation Team (Mr. **Willi Bredemeier**) regarding international suppliers.

We should advise the reader that the data related to 1997 are quite reliable, because these were specially asked in the questionnaires and were contrasted with official sales figure (*Sabe* cd-rom) but sales data for 1998 are only estimated. There it is not advisable to compare the figures of both years and to extract valid conclusions about the % variation.

Comparability with the 1994 data (MSStudy I) is a little difficult because in that exercise there was a very precise and strict limitation to the professional and business information only. In the present MSStudy II still professional information has been the main core interest area but sales of electronic education and entertainment products have been included also for companies with multiple range of products (see further comments in chapter 2.4.2.).

Companies with exclusive dedication to electronic games (consoles, cartridges) or software, have been excluded from the study.

2.1.3. Non-respondents and estimation of totals (market size in different segments, number of suppliers, number of employees)

As we said, we do not have "non-respondents" because if a particular response was not received (by post or by phone) we estimated the data and fulfilled a questionnaire. In this manner we got practically a 100% the suppliers of electronic information products and services active in Spain.

We did not asked the total number of employees of publishers and other big companies producing or selling other products (software, books, etc.) besides some EIS products.

In all cases the EIS unit of the company has been treated as a separated or independent company. This has become true along the last months in many cases where spin-offs has appeared in newspapers, books or journals publishers, software houses, etc., to sell information repackaged in electronic form.

Electronic services (ES) and other income figures were taken into account only if they were minor, or resulted in a similar volume of sales than EIS.

This could be a hindrance for obtaining the real figure of "pure EIS providers", but on the other hand this approach gives a clearer description of the EIS sector. It has no sense to burden this report including the sales or employees figures of big companies that only have a very small percentage (f. i., 1- 5%) of their activity in the EIS sector.

The staff number related to EIS is clear in some organizations but very unclear in others. It has been considered related to EIS only a minor part of the staff of some printing publishers. This part has been taken proportionally to the cd-rom sales.

For example, the 50 staff of a book publisher were not all taken into account except for 5 people and for 10% of their sales, those related to cd-roms. Total staff and total sales (including printed books, journals, etc.) were ignored.

We recognise that this estimation is quite arguable, but we believe that it is the unique possible approach if we want to measure only the electronic information activity.

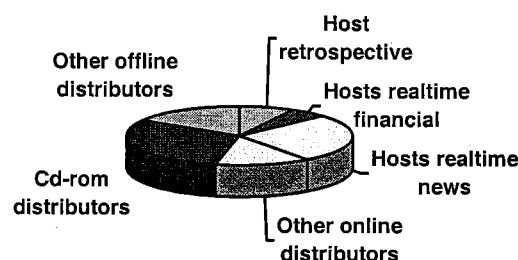
Therefore the "entertainment", "software", "printed products"... figures given here are meaningless if taken as absolute country's ones. These activities have a value only to give an idea of the **diversification level of the EIS sector**.

The fact that the only figures that have been asked for are the ones related to EIS, makes it difficult to compare the labour productivity (average revenues per employee) of 1994 and 1997. A change of approach has occurred as well between the two exercises: for example, contrary to 1994, in 1997 all the newswires employees have been considered devoted to electronic information. It is foreseeable that in a near future the newspapers employees be considered as full workers of EIS if the newspapers get most of their revenues out of electronic editions (accounting both sales and advertising).

The following diagram and table illustrate the total number of people working in EIS. The figures shown are those of the "market approach" (see below 2.2.1.) and the total is 5.211,9 employees. Under the "industry approach" we got 4.363,1 employees.

Therefore, in Spain there are $5.211,9 - 4.363,1 = 848,8$ persons (16,3%) working in EIS for companies own by foreign investors.

Employees in each supplier type



	Hosts retrospective	Hosts realtime financial	Hosts realtime news	Other online distributors	Cd-rom distributors	Other offline distributors	Total
Total number of employees	399	276	1.393	718	1.574	852	5.212

2.2. Results: Revenues

See Table 4.1

IMPORTANT NOTES:

1. All the monetary data are given in M PTA (million Spanish pesetas).
2. Chapter "3.2 Other Income Sources" of the questionnaires (the number corresponds to the original English version) have been ignored (i. e., not taken into account) in the cases when EIS is a small part of the total activity of the company (for example, software houses, ISPs, traditional publishers, etc.). Explanation has been given in chapter 2.1.3., being the reasons the same as for the number of employees. Nevertheless in 2.2.1.2. we provide a breakdown of the "other income sources" revenues because it can be useful for knowing which other activities are being carried out by the companies which core activity is electronic information provision.

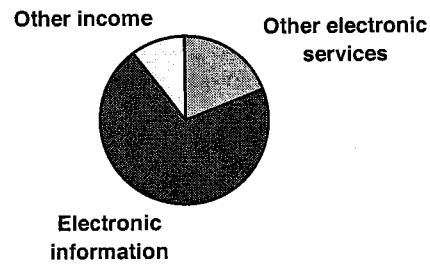
2.2.1. Total revenues (1): Market approach

2.2.1.1. Overall revenues

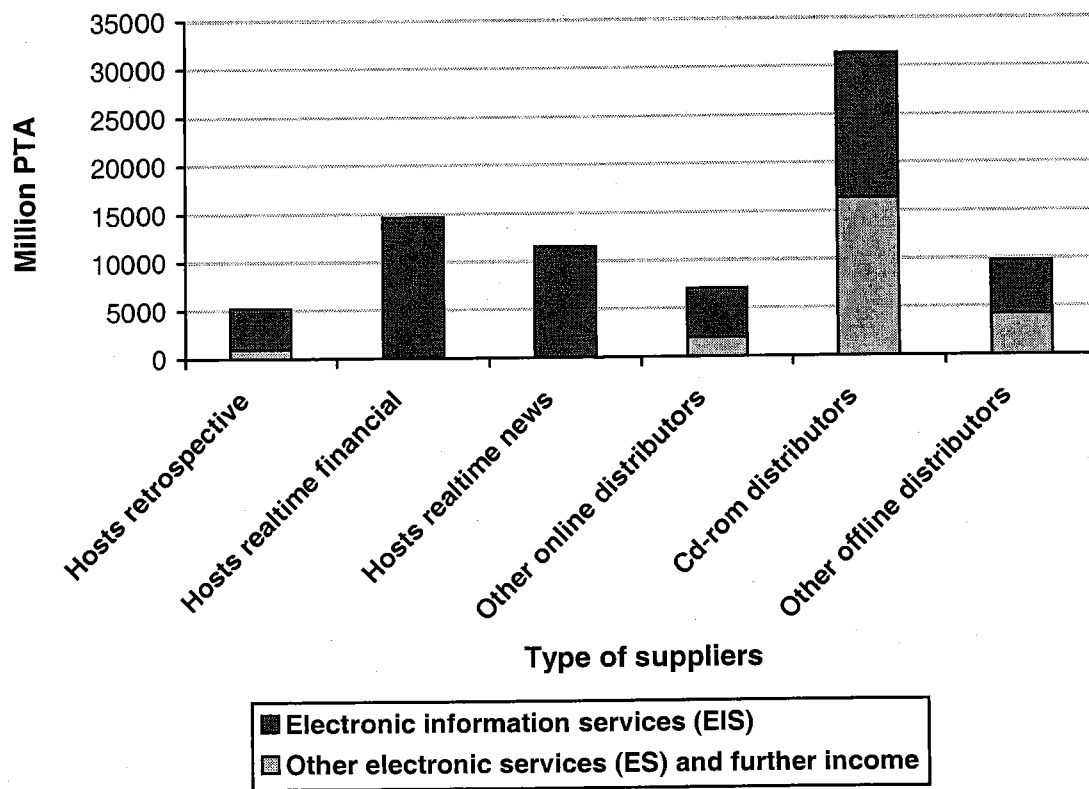
The total income figure of the electronic information providers in Spain amounts M PTA 79.550,86, which can be broken down as follows:

Electronic information services	M PTA 56.025,02
Other electronic services	15.311,35
Other (further) income	8.214,49

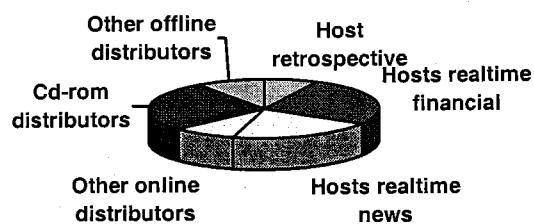
Electronic information / other income ("market")

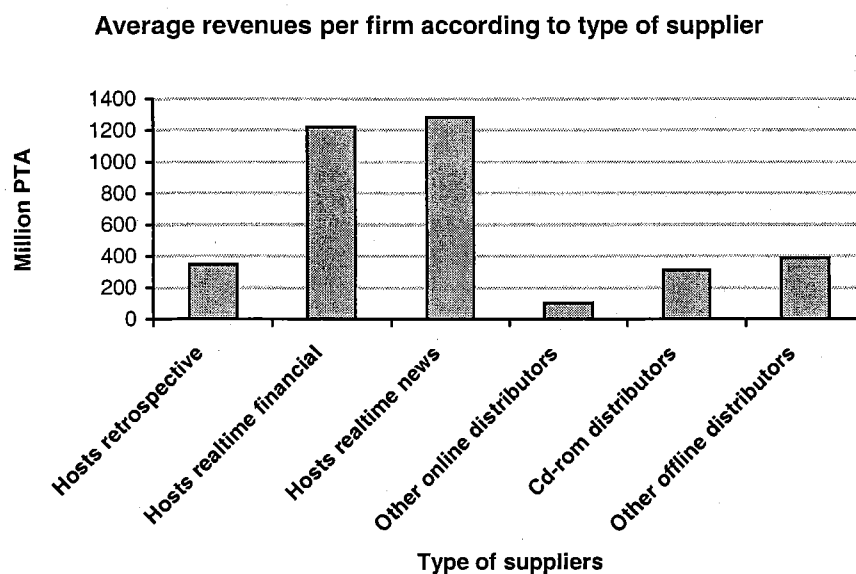


Overall revenues (EIS and ES+further income). 1997



Overall revenues (EIS only)

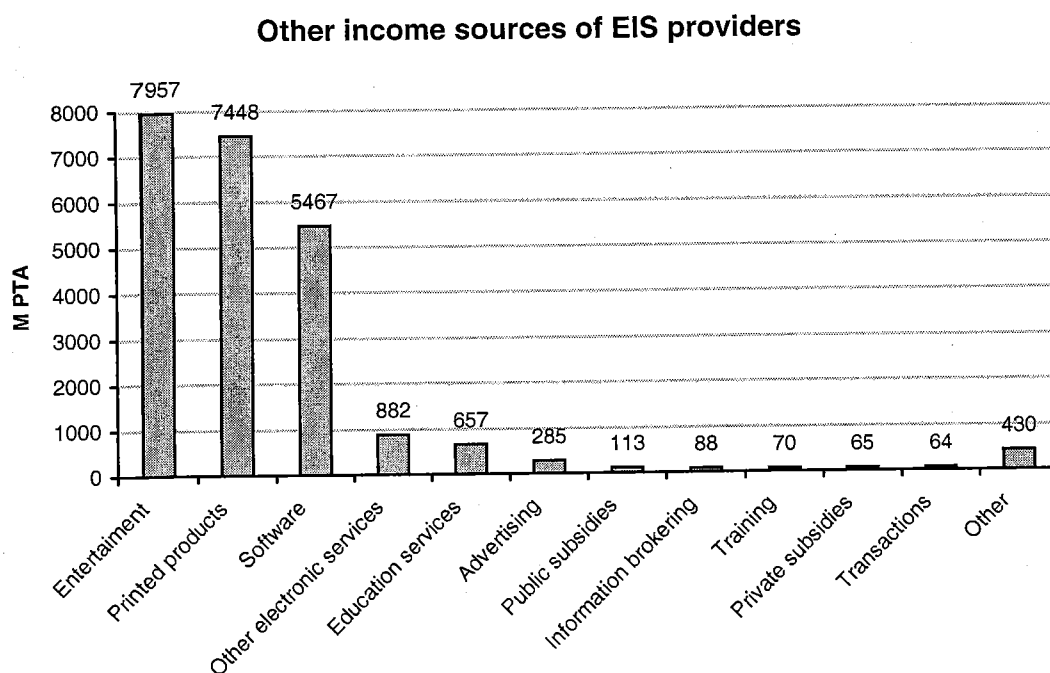




2.2.1.2. Other revenues of EIS suppliers

The drawing below gives an idea of the diversification of the companies devoted to electronic information supply. Data have to be read cautiously because here we have taken into account only the enterprises whose main activity is to supply electronic information (or at least in a percentage equal or higher than 50%). When the percentage of EIS was much lower we considered the EIS unit as a spin-off or independent company (which is something that frequently happen in the reality) devoted 100% to EIS.

Example: The first bar of the drawing means that all the EIS providers earned M PTA 7.957 selling entertainment products and services in Spain, but by not any means this figure corresponds to the Spanish total of entertainment products and services, which probably is more higher.



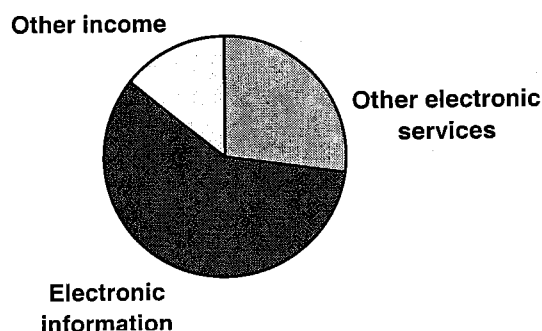
2.2.2. Total revenues (2): Industry approach

See tables 4.1 and 4.2.

The Spanish companies' revenues amounted M PTA 58.283,87 which can be broken down as follows:

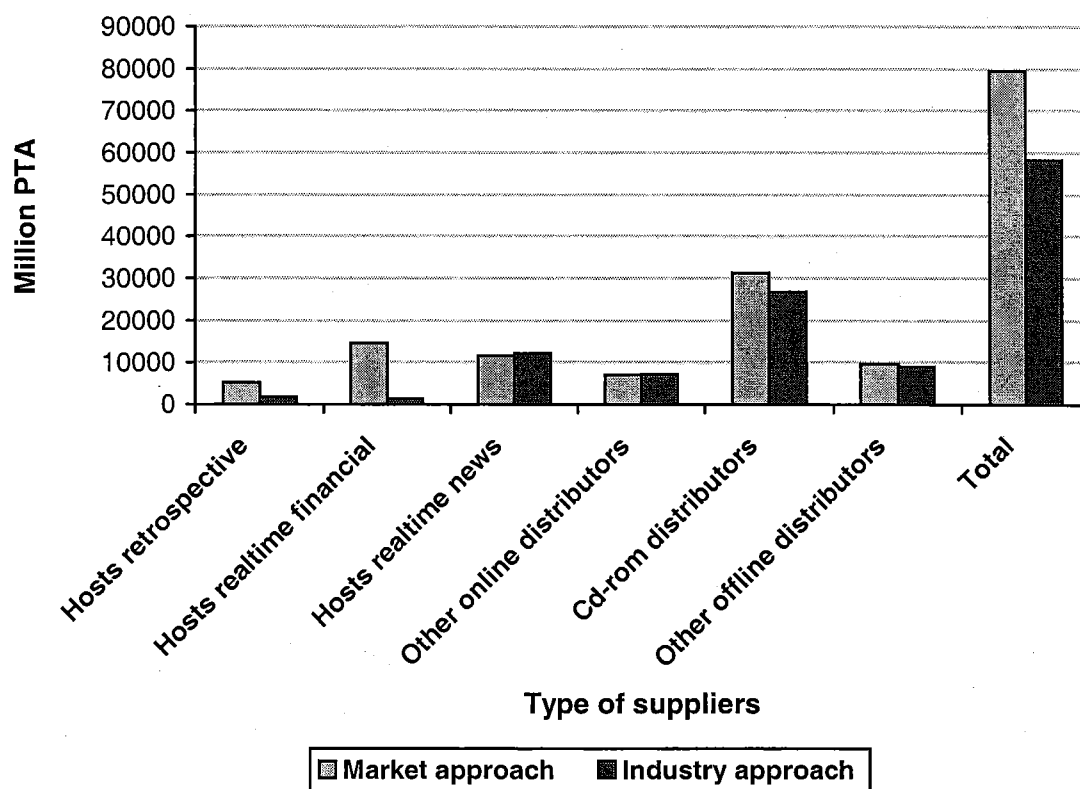
Electronic information services	M PTA 34.210,73
Other electronic services	15.858,65
Other (further) income	8.214,49

Electronic information / other income ("industry")



The following chart allows to compare the revenues of each supplier type according to both the **market** and the **industry** approaches.

Overall revenues (EIS and further income). 1997



2.2.3. Exports and imports

See table 5 of "Industry approach". The "Market approach" set of tables has not the table 5 because exports are not accounted.

$$[\text{Total sales of Spanish companies}] - [\text{Spanish exports}] / [\text{Total market}] = 58.283,87 - 2.365,45 / 79.550,86 = 0,7029$$

The Spanish companies accounted for 70,3% of the Spanish electronic information market (including also other income sources).

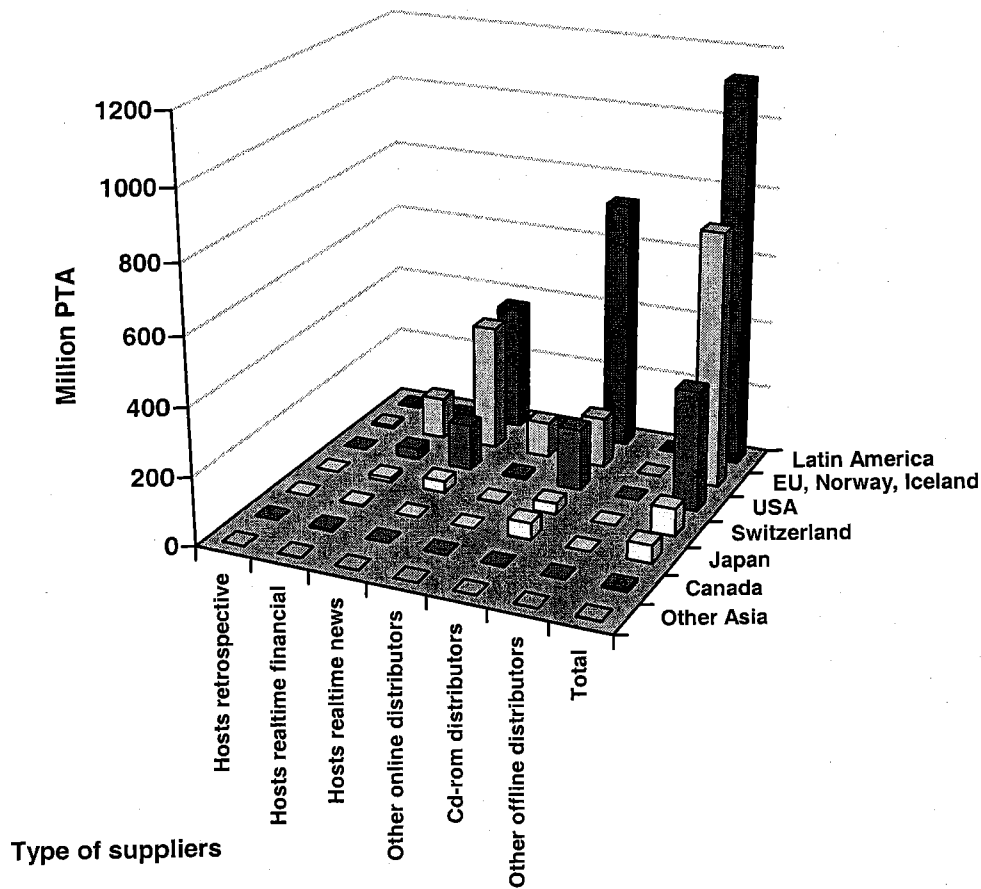
Considering strictly EIS, the Spanish consumption was M PTA 56.025,02. Of this amount, $34.210,73 - 2.366,45 = \text{M PTA } 31.844,28$ corresponds to EIS produced in Spain (the Spanish companies supply $31.844,28 / 56.025,02 = 56,8\%$ of the domestic market).

In 1997 Spain exported electronic information as per M PTA 2.366 and imported as per $56.025 - 31.844,73 = \text{M PTA } 24.180,27$

Spanish EIS imports were: $56.025,02 - 31.844,28 = \text{M PTA } 24.179,74$

Exports geographical analysis:

Spanish EIS exports. 1997



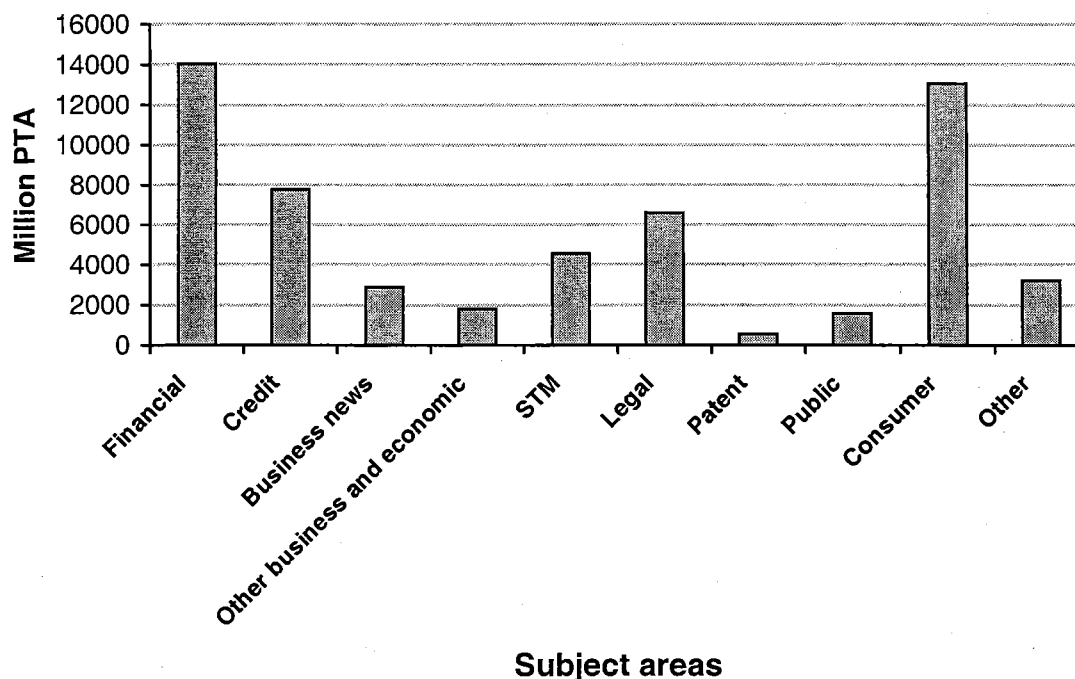
The 1998's exports —see the 1998 tables- were estimated on the basis of the same geographical pattern than in 1997 (1998's export figures were not asked in the questionnaires).

2.2.4. Revenues by subject area

See tables 6.1 and 6.2.

The diagram below illustrates the totals of table 6, market approach.

Revenues by subject area. 1997



2.2.5. Revenues by user groups

See tables 7.1 and 7.2.

Important note:

The MSSstudy scope is centred in electronic information. Consumer products (fiction, games) other than information has not been taken into account except in a few cases that they are produced by companies offering at the same time informational and educational titles. The figures given here can be taken as country totals for "electronic information for consumers" but not for "electronic services for consumers", a field much more broader.

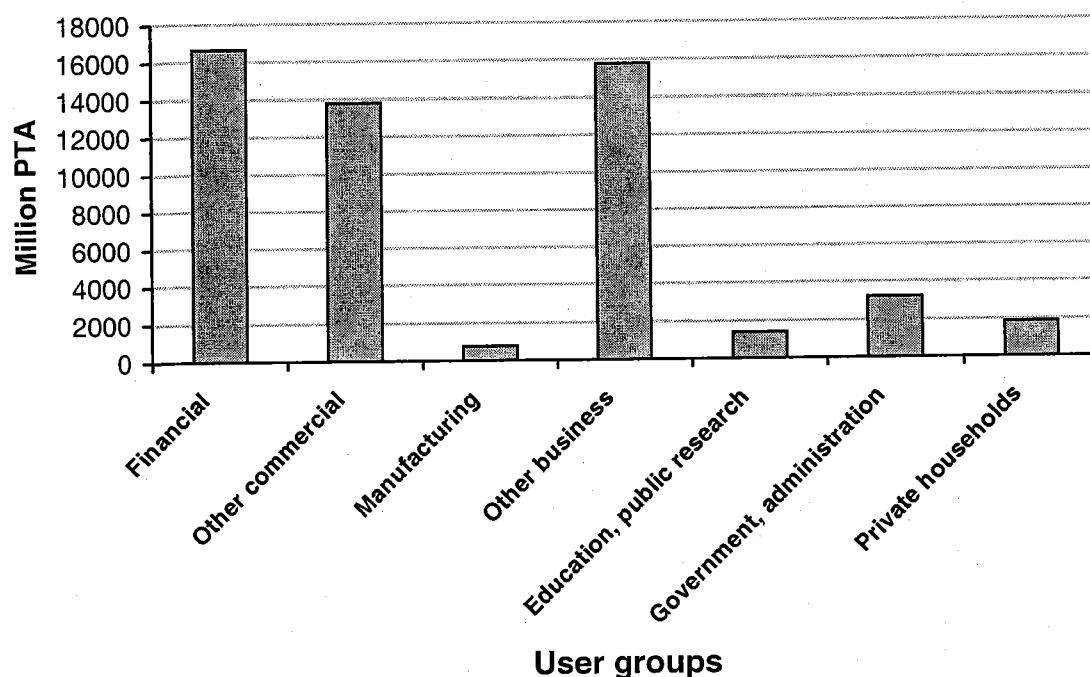
An ambiguity was produced in the answers to the question about the users or customers of EIS. Some respondents considered their "consumer information" as being sold to "private households", but other answered "other business" because these other business retail to consumers. In other words, some thought in their immediate clients (the intermediary shops) and some thought in the end users for which their information product was intended.

Direct sales of consumer information to private households are usual with online services but many cd-roms are sold through resellers.

The data about the sales to other business provided by the EIS suppliers has been useful to avoid double counting.

Under "other commercial" there are included services like commerce and trade, consultants, lawyers, transports, etc.

Revenues by user groups. 1997



2.3. Results (2): Other factors

2.3.1. Labour productivity

The labour productivity (average revenue per employee) is considered only under the "industry or national approach". The "market approach" would give a distorted result as it has no sense to include foreign suppliers because --considered individually- these might have only a (few) commercial agents in the country which would account for (big) sales. In the limit situation that the supplier do not have any staff in the considered country, the "productivity" would be infinite.

In the productivity calculations the revenues for the following concepts are NOT included: printed products, information brokering, training/seminars, private subsidies, public subsidies and other revenues. This is because companies were asked to provide the number of employees **related to EIS** only.

	Hosts retros- pective	Hosts realtime financial	Hosts realtime news	Other online distributors	Cd-rom distributors	Other offline distributors	Average
--	-----------------------------	--------------------------------	---------------------------	---------------------------------	------------------------	----------------------------------	---------

Productivity (M PTA / employee)	7,34	28,23	8,69	9,64	15,67	10,59	11,34
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2.3.2. Multimedia

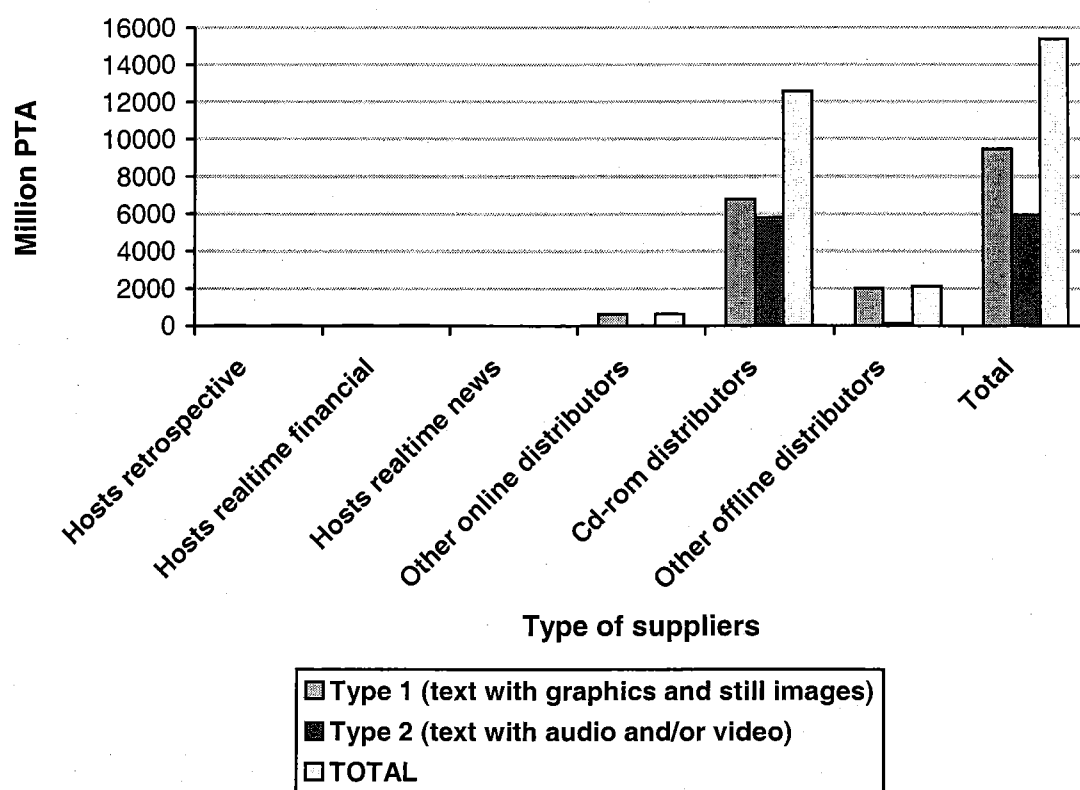
See tables 8.1 and 8.2

As we said in chapter 2.2.5., it has to be underlined that only the suppliers of electronic information services are considered in MSSStudy. Therefore the multimedia figures shown here do not reflect the total multimedia production of the country (fiction, games, etc., are excluded from this survey).

106 (45%) of all respondents said that they are having some kind of multimedia activity in 1997 [112 (48%) in 1998].

It is difficult to ascertain the real implementation degree of multimedia when looking at the supplier's answers. In some cases they considered their products 100% Type 2 multimedia (audio and video) only because they had included a small piece of video or a cartoon in the cd-rom.

Multimedia revenues. 1997

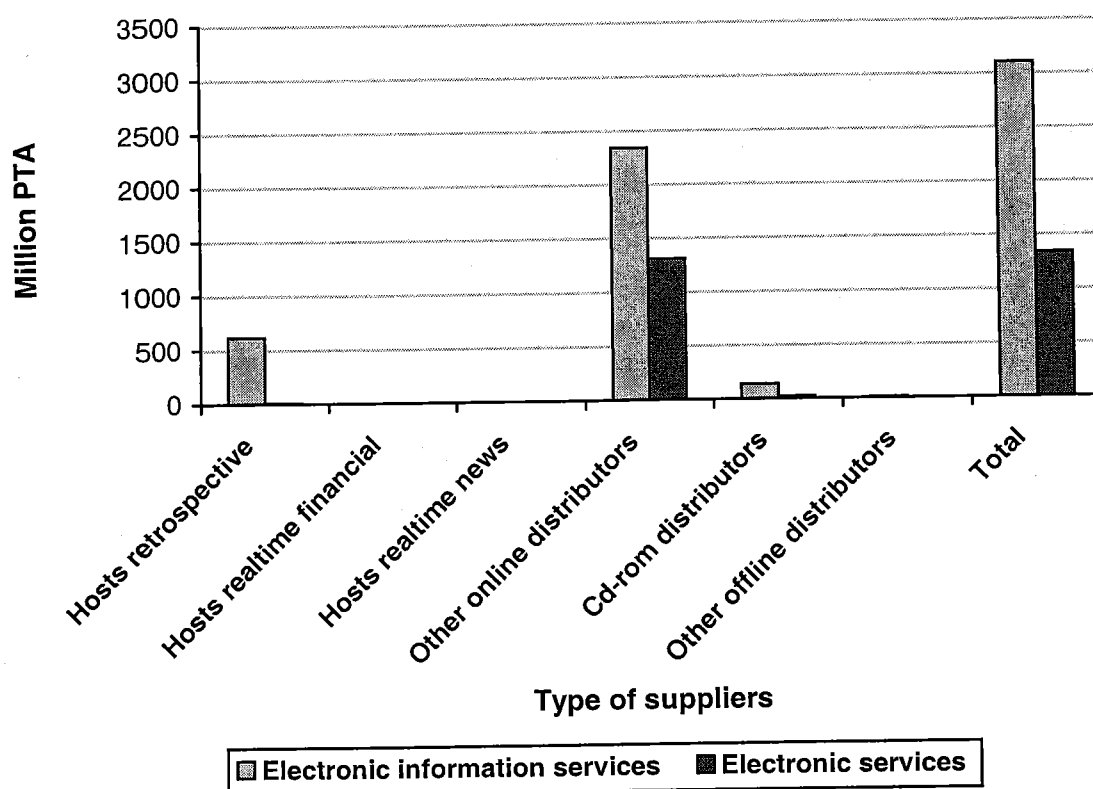


2.3.3. Internet

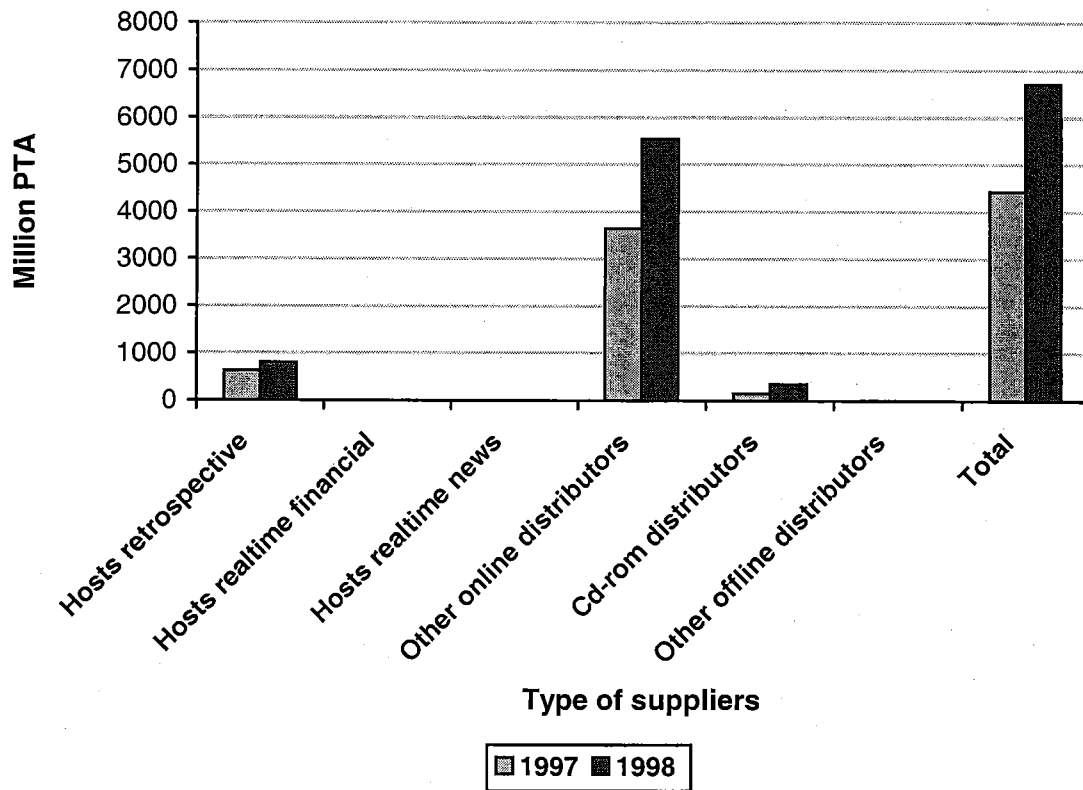
See table 9.

68 (29%) of the respondents said that they were involved in the provision of services through internet. Out of this, 61 (26,3%) offered EIS and 44 (18,9%) offered ES (e-mail, transactions, web hosting, advertising, etc.).

Internet revenues by EIS and ES. 1997

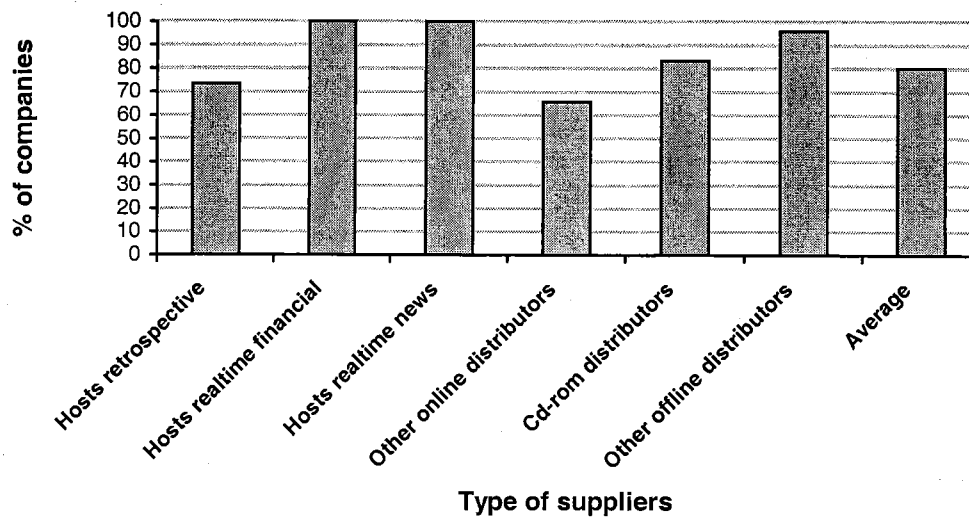


Total internet revenues. Comparison 1997 and 1998

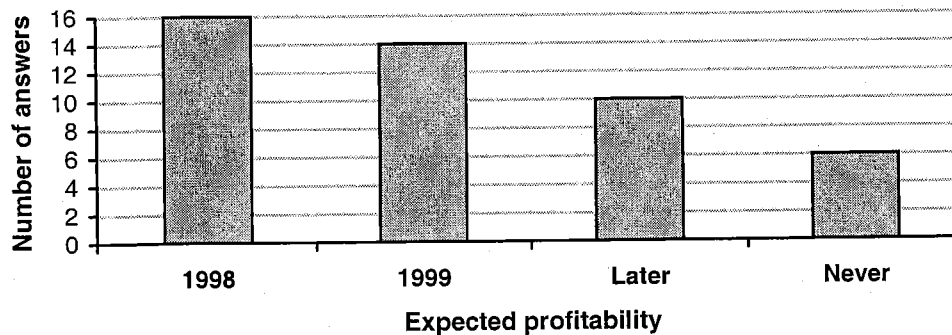


2.3.4. Profitability

Profitability in 1997



Prospective profitability of non profitable suppliers



2.4. Analysis and recommendations

2.4.1. Ratios: Revenues in relation to the gross product and inhabitants

1997

Total revenues of the national electronic information industry companies (includes EIS and ES): 58.283,87 M PTA.

Total Spanish market of electronic information (includes EIS and ES): 79.550,86 M PTA.

Gross domestic product: 44.224.100 M PTA

Inhabitants: 39.323.320 (July 1996)

$$58.283,87 / 44.224.100 = 0,001318$$

"EIS intensity of the Economy":

The EIS sector is 1,318 ‰ of GDP

"EIS penetration":

$$79.550,86 \text{ M PTA} / 39.323.320 = 2.022,9 \text{ PTA / inhabitant}$$

2.4.2. Development of revenues over time

It is quite difficult to compare the figures of 1994 and 1997 because there have been some main changes both in the market (more companies, more sales) and in our approach (criteria).

Here are some reasons that help to explain the 65% annual increase in the years between 1994 and 1997 in Spain:

New players

A number of traditional publishers have launched cd-roms in 1997. Although most of these publishers have become "electronic" only in a small part (1-5% of their activity), it has to be taken into account that the Spanish publishing industry is important (M PTA 930.000 = M Euro 5.563).

Consumer information was not accounted in 1994.

There have been included some Spanish search engines and newspapers in MSStudy II because they earn money from banners and other advertising. They do not sum up a big amount of money, but its inclusion increases significantly the total number of companies. They have been put under "other online".

Shift from paper to electronic

Newswires were considered "partly" electronic in 1994: only 38% of their sales were included in MSStudy I, whereas in 1997 they have been accounted as 100% electronic. Journalists feed the system entering their stories electronically and the output is fully online as well.

Newswires have an important weight in the Spanish total survey.

In 1994 hardware and software accounted for an important part of the turnover of the realtime financial information services, but currently software is almost given for free and users use standard PCs. Therefore in 1997 the sales of these companies have been considered as 100% information (the Spanish agents of the financial information services do not receive commissions on transactions; if so, probably this aspect is managed from London or other headquarters).

Companies selling texts and photos for newspapers are now selling digitized materials through web catalogues and e-mail. These companies existed in 1994, but at that time they could not be considered as "electronic". They have been included in MSStudy II as "other online".

A last comment to this Part I (Supply side)

It has to be taken into account that Spain is not a rich country in STM but has an important cultural heritage. Consequently until 1993 had had a scarce development of STM and other professional databases, but afterwards Spain has developed considerably cultural and consumer information along with the generalisation of cd-roms and internet.

Tables "Market 97"

Tab. 1: Response Rates in Spain in 1997

No. of and %	TYPE OF SUPPLIERS							Total
	Hosts retrospec.	Hosts realtime financial	Hosts realtime news	Other online distributors	CD-ROM distributors	Other offline distributors	Other suppliers	
Relevant organisations (a)	15	12	9	70	101	25	0	232
Responses (b)	10	6	4	58	61	17	0	156
Full usable responses * (c)	10	6	4	42	45	15	0	122
Response rate I in (b) (a)	0,67	0,50	0,44	0,83	0,60	0,68	0	0,67
Response rate II (c) (a)	0,67	0,50	0,44	0,60	0,45	0,60	0	0,53
Response rate III** in %	95	100	95	75	85	80	0	90

* Means: with revenue figures for EIS

** This is not a formal response rate (as I and II) but a rate which indicates the representativity of the survey results in % of the market segments which are covered by the full usable responses.

Tab. 2: Characterisation of Full Usable Respondents in Spain in 1997

	TYPE OF SUPPLIERS							
	Hosts retrospec.	Hosts realtime financial	Hosts realtime news	Other online distributors	CD-ROM distributors	Other offline distributors	Other suppliers	Total
No. of employees (full time equiv.)								0
% (est.) of total employees								0
Estimated no. of total employees								0

Total employees means estimated f.t.e. in all relevant organisations in the different supplier types in year per country.

Tab. 3: Human Resources (in Full-time Equivalents) in Spain in 1997

	TYPE OF SUPPLIERS							Total
	Hosts retrospec.	Hosts realtime financial	Hosts realtime news	Other online distributors	CD-ROM distributors	Other offline distributors	Other suppliers	
Total number of employees (f.t.e)	398,5	276	1393	718	1573,9	852,5	0	5211,9
Average Revenues per Employee (labour productivity)	11,96	53,08	8,27	9,27	15,32	11,3	0	13,69
Change in Employment (in %) 1997/94								0
Change in Labour Productivity (in %) 1997/94								0

"Total number of employees" means the exact number from the questionnaires.

Tab. 4.1: Overall Revenues and Further Income (National Currency)
by Type of Suppliers and Type of Services/Products in Spain in 1997

Type of services/products	TYPE OF SUPPLIERS							
	Hosts retrospec.	Hosts realtime financial	Hosts realtime news	Other online distributors	CD-ROM distributors	Other offline distributors	Other suppliers	Total
Retrospec. online database s.	2808,86	12,00	479,05	3567,93	728,25	7,90	0,00	7603,99
Real-time financial s.	2,64	4274,55	0,00	4,11	0,00	0,00	0,00	4281,30
Real-time newswire s.	0,00	9777,91	10999,99	7,43	8,18	0,00	0,00	20793,51
Other online s.	614,61	79,89	31,86	1235,58	494,08	16,75	0,00	2472,77
CD-ROM s.	835,47	506,50	7,90	293,14	13736,55	700,00	0,00	16079,56
Other Offline s.	0,00	0,00	0,00	15,44	0,00	4778,45	0,00	4793,89
Total EIS (I)	4261,58	14650,85	11518,80	5123,63	14967,06	5503,10	0,00	56025,02

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Tab. 4.1 (cont.): Overall Revenues and Further Income (National Currency) by Type of Suppliers and Type of Services/Products in Spain in 1997

Type of services/products	TYPE OF SUPPLIERS							
	Hosts retrospec.	Hosts realtime financial	Hosts realtime news	Other online distributors	CD-ROM distributors	Other offline distributors	Other suppliers	Total
Advertising s.	0	0	0	228,77	55,8	0	0	284,57
Transaction s.	0	0	0	64,26	0	0	0	64,26
Education s.	0	0	0	47,8	609,69	0	0	657,49
Entertainment	0	0	0	29,86	7798,69	128	0	7956,55
Software	408,85	0	0	399,24	672,69	3986	0	5466,78
Other types of ES	97,94	0	0	764,61	5,65	13,5	0	881,7
Printed products	304,26	0	0	59,95	7042,6	41,09	0	7447,9
Information brokering	8,65	0	0	35,55	14,1	29,97	0	88,27
Training/seminars	1,1	0	0	38,05	28,92	2	0	70,07
Private subsidies	2,2	0	0	60	2,78	0	0	64,98
Public Subsidies	10,1	0	20	55,4	23,1	4,44	0	113,04
Other	127,75	0	0	178,38	106,1	18	0	430,23
Total II	5222,43	14650,85	11538,80	7085,50	31327,18	9726,10	0,00	79550,86

Tab. 4.2: Overall Revenues and Further Income
by Type of Suppliers and Type of Services/Products in Spain in 1997 in %

Type of services/products	TYPE OF SUPPLIERS							
	Hosts retrospec.	Hosts realtime financial	Hosts realtime news	Other online distributors	CD-ROM distributors	Other offline distributors	Other suppliers	Total
Retrospec. online database s.	53,78	0,08	4,15	50,36	2,32	0,08	0,00	9,56
Real-time financial s.	0,05	29,18	0,00	0,06	0,00	0,00	0,00	5,38
Real-time newswire s.	0,00	66,74	95,33	0,10	0,03	0,00	0,00	26,14
Other online s.	11,77	0,55	0,28	17,44	1,58	0,17	0,00	3,11
CD-ROM s.	16,00	3,46	0,07	4,14	43,85	7,20	0,00	20,21
Other Offline s.	0,00	0,00	0,00	0,22	0,00	49,13	0,00	6,03
Total EIS (I)	81,60	100,00	99,83	72,31	47,78	56,58	0,00	70,43

(to be continued on the following page)

**Tab. 4.2 (cont.): Overall Revenues and Further Income
by Type of Suppliers and Type of Services/Products in Spain in 1997 in %**

Type of services/products	TYPE OF SUPPLIERS							
	Hosts retrospec.	Hosts realtime financial	Hosts realtime news	Other online distributors	CD-ROM distributors	Other offline distributors	Other suppliers	Total
Advertising s.	0,00	0,00	0,00	3,23	0,18	0,00	0,00	0,36
Transaction s.	0,00	0,00	0,00	0,91	0,00	0,00	0,00	0,08
Education s.	0,00	0,00	0,00	0,67	1,95	0,00	0,00	0,83
Entertainment s.	0,00	0,00	0,00	0,42	24,89	1,32	0,00	10,00
Software	7,83	0,00	0,00	5,63	2,15	40,98	0,00	6,87
Other types of ES	1,88	0,00	0,00	10,79	0,02	0,14	0,00	1,11
Printed products	5,83	0,00	0,00	0,85	22,48	0,42	0,00	9,36
Information brokering	0,17	0,00	0,00	0,50	0,05	0,31	0,00	0,11
Training/seminars	0,02	0,00	0,00	0,54	0,09	0,02	0,00	0,09
Private subsidies	0,04	0,00	0,00	0,85	0,01	0,00	0,00	0,08
Public subsidies	0,19	0,00	0,17	0,78	0,07	0,05	0,00	0,14
Others	2,45	0,00	0,00	2,52	0,34	0,19	0,00	0,54
Total II	100	100	100	100	100	100	0	100

Tab. 6.1: Analysis of Revenues by Subject Area in Spain in 1997 in National Currency

Subject Area	TYPE OF SUPPLIERS								Total
	Hosts retrospec.	Hosts realtime financial	Hosts realtime news	Other online distributors	CD-ROM distributors	Other offline distributors	Other suppliers		
Financial Information	37,77	13194,35	0	328,1	358,44	132,7	0	14051,36	
Credit Information	2175,06	0	0	2735,32	1520,4	1342,5	0	7773,28	
Business News	367,59	1222,83	1125,47	127,91	30,8	7,4	0	2882	
Other Business and Economic Information	364,07	12,63	158,21	670,97	371,27	218,5	0	1795,65	
Scientific, Technical, Medical Information	424,75	6,32	145,35	74,61	3192,55	722,5	0	4566,08	
Legal Information	280,99	0	15,4	53,18	6244,7	8,1	0	6602,37	
Patent Information	503,02	0	0	3,64	35,93	0	0	542,59	
Public Information	83,8	12,63	1052,29	129,12	176,2	119	0	1573,04	
Consumer Information	18,2	183,15	9022,08	505,86	2942,08	387,9	0	13059,27	
Other Subject Areas	6,32	18,95	0	486,29	140,56	2564,5	0	3216,62	
Total	4261,57	14650,86	11518,8	5115	15012,93	5503,1	0	56062,26	

Tab. 6.2:

[illegible]

Tab. 7.1: Analysis of Revenues by User Groups in Spain in 1997 in National Currency

User Groups	TYPE OF SUPPLIERS							
	Hosts retrospec.	Hosts realtime financial	Hosts realtime news	Other online distributors	CD-ROM distributors	Other offline distributors	Other suppliers	Total
Financial Services	1201,16	10226,7	1105,99	1358,27	2191,82	573,3	0	16657,24
Other Commercial Services	2016,42	3423,79	2062,68	1628,37	2879,71	1769,14	0	13780,11
Manufacturing	189,76	6,32	0	300,34	257,25	22,25	0	775,92
Other Business	496,91	952,06	7375,34	1282,78	3717,57	1971,03	0	15795,69
Education, Public, Research etc.	228,15	30	7,9	149,55	929,28	35,79	0	1380,67
Government, Administration	56	12	966,89	218,22	840,57	1129,74	0	3223,42
Private Households	73,19	0	0	186,07	1580,86	1,85	0	1841,97
Total	4261,59	14650,87	11518,8	5123,6	12397,06	5503,1	0	53455,02

Tab. 8.1: Analysis of Revenues by Delivered Format in Spain in 1997 in National Currency

Type of Supplier / Delivered Format	TYPE OF SUPPLIERS							
	Hosts retrospec.	Hosts realtime financial	Hosts realtime news	Other online distributors	CD-ROM distributors	Other offline distributors	Other suppliers	Total
Multimedia								
- Type 1	34,00	30,00	0,00	633,00	6779,66	1986,30	0,00	9462,96
- Type 2	0,00	0,00	0,00	9,00	5792,92	134,00	0,00	5935,92
Total	34,00	30,00	0,00	642,00	12572,58	2120,30	0,00	15398,88

Tab. 8.2: Analysis of Revenues by Delivered Format in Spain in 1997 in %

Type of Supplier / Delivered Format	TYPE OF SUPPLIERS							
	Hosts retrospec.	Hosts realtime financial	Hosts realtime news	Other online distributors	CD-ROM distributors	Other offline distributors	Other suppliers	Total
Multimedia								
- Type 1	100,00	100,00	0,00	98,60	53,92	93,68	0,00	61,45
- Type 2	0,00	0,00	0,00	1,40	46,08	6,32	0,00	38,55
Total	100,00	100,00	0,00	100,00	100,00	100,00	0,00	100,00

Tab. 9: Internet-Engagement (WWW) in Spain in 1997/1998

Number of Suppliers / Revenues (national currency)	TYPE OF SUPPLIERS							
	Hosts retrospec.	Hosts realtime financial	Hosts realtime news	Other online distributors	CD-ROM distributors	Other offline distributors	Other suppliers	Total
Total answers	5	0	0	51	11	1	0	68
EIS in WWW 1997	5	0	0	46	9	1	0	61
ES in WWW 1997	1	0	0	38	5	0	0	44
Revenues from EIS in WWW 1997	615,15	0	0	2340,28	137,1	10	0	3102,53
Revenues from ES in WWW 1997	8,15	0	0	1306,18	20,9	0	0	1335,23

Tab. 10.1: Profitability (No. of Answers) in Spain in 1997 in Terms of Operating Costs

Number of Suppliers	TYPE OF SUPPLIERS							Total
	Hosts retrospec.	Hosts realtime financial	Hosts realtime news	Other online distributors	CD-ROM distributors	Other offline distributors	Other suppliers	
Total Answers	15	12	9	70	101	25	0	232
Yes	11	12	9	46	84	24	0	186
No	4	0	0	24	17	1	0	46
1998	0	0	0	12	4	0	0	16
1999	0	0	0	8	5	1	0	14
Later	3	0	0	1	6	0	0	10
Never	1	0	0	3	2	0	0	6

Tab. 10.2: Profitability (No. of Answers) in Spain in 1997 in Terms of Full Costs

Number of Suppliers	TYPE OF SUPPLIERS							
	Hosts retrospec.	Hosts realtime financial	Hosts realtime news	Other online distributors	CD-ROM distributors	Other offline distributors	Other suppliers	Total
Total Answers	15	12	9	70	101	25	0	232
Yes	9	11	7	20	72	20	0	139
No	6	1	2	50	39	5	0	103
1998	0	0	0	6	7	0	0	13
1999	0	0	2	23	12	3	0	40
Later	1	0	0	16	18	1	0	36
Never	5	0	0	5	3	1	0	14

Tables "Industry 97"

Tab. 1: Response Rates in Spain in 1997

No. of and %	TYPE OF SUPPLIERS							Total
	Hosts retrospec.	Hosts realtime financial	Hosts realtime news	Other online distributors	CD-ROM distributors	Other offline distributors	Other suppliers	
Relevant organisations (a)	9	5	7	69	86	23	0	199
Responses (b)	8	4	4	55	46	17	0	134
Full usable responses * (c)	8	4	4	39	38	15	0	108
Response rate I in $\frac{(b)}{(a)}$	0,89	0,80	0,57	0,80	0,53	0,74	0	0,67
Response rate II $\frac{(c)}{(b)}$	0,89	0,80	0,57	0,57	0,44	0,65	0	0,54
Response rate III** in %	90	95	90	70	65	60	0	80

* Means: with revenue figures for EIS

** This is not a formal response rate (as I and II) but a rate which indicates the representativity of the survey results in of the market segments which are covered by the full usable responses.

Tab. 2: Characterisation of Full Usable Respondents in Spain in 1997

	TYPE OF SUPPLIERS							Total
	Hosts retrospec.	Hosts realtime financial	Hosts realtime news	Other online distributors	CD-ROM distributors	Other offline distributors	Other suppliers	
No. of employees (full time equiv.)								0
% (est.) of total employees								0
Estimated no. of total employees								0

Total employees means estimated f.t.e. in all relevant organisations in the different supplier types in year per country.

Tab. 3: Human Resources (in Full-time Equivalents) in Spain in 1997

	TYPE OF SUPPLIERS							
	Hosts retrospec.	Hosts realtime financial	Hosts realtime news	Other online distributors	CD-ROM distributors	Other offline distributors	Other suppliers	Total
Total number of employees (f.t.e)	177,5	49	1393	701	1238,1	804,5	0	4363,1
Average Revenues per Employee (labour productivity)	7,344	28,23	8,69	9,64	15,67	10,59	0	11,34
Change in Employment (in %) 1997/94								0
Change in Labour Productivity (in %) 1997/94								0

"Total number of employees" means the exact number from the questionnaires.

Tab. 4.1: Overall Revenues and Further Income (National Currency)
by Type of Suppliers and Type of Services/Products in Spain in 1997

Type of services/products	TYPE OF SUPPLIERS							
	Hosts retrospec.	Hosts realtime financial	Hosts realtime news	Other online distributors	CD-ROM distributors	Other offline distributors	Other suppliers	Total
Retrospec. online database s.	578,41	12,00	521,05	3614,93	223,95	7,90	0,00	4958,24
Real-time financial s.	2,64	1137,20	0,00	4,11	0,00	0,00	0,00	1143,95
Real-time newswire s.	0,00	154,41	11550,99	7,43	10,00	0,00	0,00	11722,83
Other online s.	24,50	79,89	31,86	1280,63	196,43	16,75	0,00	1630,06
CD-ROM s.	186,11	0,00	7,90	301,64	9466,12	0,00	0,00	9961,76
Other Offline s.	0,00	0,00	0,00	15,44	0,00	4778,45	0,00	4793,89
Total EIS (I)	791,66	1383,50	12111,80	5224,17	9896,50	4803,10	0,00	34210,73

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**Tab. 4.1 (cont.): Overall Revenues and Further Income (National Currency)
by Type of Suppliers and Type of Services/Products in Spain in 1997**

Type of services/products	TYPE OF SUPPLIERS							
	Hosts retrospec.	Hosts realtime financial	Hosts realtime news	Other online distributors	CD-ROM distributors	Other offline distributors	Other suppliers	Total
Advertising s.	0	0	0	228,79	55,8	0	0	284,59
Transaction s.	0	0	0	64,26	0	0	0	64,26
Education s.	0	0	0	47,8	662,8	0	0	710,6
Entertainment	0	0	0	29,86	8261,75	128	0	8419,61
Software	412,87	0	0	399,24	698,24	3986	0	5496,35
Other types of ES	99,13	0	0	764,61	6	13,5	0	883,24
Printed products	304,26	0	0	59,95	7042,6	41,09	0	7447,9
Information brokering	8,65	0	0	35,55	14,1	29,97	0	88,27
Training/seminars	1,1	0	0	38,05	28,92	2	0	70,07
Private subsidies	2,2	0	0	60	2,78	0	0	64,98
Public Subsidies	10,1	0	20	55,4	23,1	4,44	0	113,04
Other	127,75	0	0	178,38	106,1	18	0	430,23
Total II	1757,72	1383,50	12131,80	7186,06	26798,69	9026,10	0,00	58283,87

Tab. 4.2: Overall Revenues and Further Income
by Type of Suppliers and Type of Services/Products in Spain in 1997 in %

Type of services/products	TYPE OF SUPPLIERS							
	Hosts retrospec.	Hosts realtime financial	Hosts realtime news	Other online distributors	CD-ROM distributors	Other offline distributors	Other suppliers	Total
Retrospec. online database s.	32,91	0,87	4,29	50,30	0,84	0,09	0,00	8,51
Real-time financial s.	0,15	82,20	0,00	0,06	0,00	0,00	0,00	1,96
Real-time newswire s.	0,00	11,16	95,21	0,10	0,04	0,00	0,00	20,11
Other online s.	1,39	5,77	0,26	17,82	0,73	0,19	0,00	2,80
CD-ROM s.	10,59	0,00	0,07	4,20	35,32	0,00	0,00	17,09
Other Offline s.	0,00	0,00	0,00	0,21	0,00	52,94	0,00	8,23
Total EIS (I)	45,04	100,00	99,84	72,70	36,93	53,21	0,00	58,70

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Tab. 4.2 (cont.): Overall Revenues and Further Income by Type of Suppliers and Type of Services/Products in Spain in 1997 in %

Type of services/products	TYPE OF SUPPLIERS							
	Hosts retrospec.	Hosts realtime financial	Hosts realtime news	Other online distributors	CD-ROM distributors	Other offline distributors	Other suppliers	Total
Advertising s.	0,00	0,00	0,00	3,18	0,21	0,00	0,00	0,49
Transaction s.	0,00	0,00	0,00	0,89	0,00	0,00	0,00	0,11
Education s.	0,00	0,00	0,00	0,67	2,47	0,00	0,00	1,22
Entertainment s.	0,00	0,00	0,00	0,42	30,83	1,42	0,00	14,45
Software	23,49	0,00	0,00	5,56	2,61	44,16	0,00	9,43
Other types of ES	5,64	0,00	0,00	10,64	0,02	0,15	0,00	1,52
Printed products	17,31	0,00	0,00	0,83	26,28	0,46	0,00	12,78
Information brokering	0,49	0,00	0,00	0,49	0,05	0,33	0,00	0,15
Training/seminars	0,06	0,00	0,00	0,53	0,11	0,02	0,00	0,12
Private subsidies	0,13	0,00	0,00	0,83	0,01	0,00	0,00	0,11
Public subsidies	0,57	0,00	0,16	0,77	0,09	0,05	0,00	0,19
Others	7,27	0,00	0,00	2,48	0,40	0,20	0,00	0,74
Total II	100	100	100	100	100	100	0	100

Tab. 5.1: Geographical Analysis of Total Revenues
in Spain in 1997 in National Currency

Country	TYPE OF SUPPLIERS							
	Hosts retrospec.	Hosts realtime financial	Hosts realtime news	Other online distributors	CD-ROM distributors	Other offline distributors	Other suppliers	Total
Home country	1294,36	1208,85	11201,8	6627,66	18440,65	8930,6	0	47703,92
EU, Norway, Iceland	7,2	122,26	371	103,4	146,91	0	0	750,77
Switzerland	0	12,23	33,6	2,55	32	0	0	80,38
Eastern Europe	0	0	0	0	0	0	0	0
USA	0	29,69	134,4	7,55	179,41	0	0	351,05
Canada	0	5,24	0	0	0	0	0	5,24
Latin America	2,1	0,7	371	17,55	733,55	0	0	1124,9
Japan	0	3,49	0	0	48,57	0	0	52,06
Other Asia	0	1,05	0	0	0	0	0	1,05
Other Countries	0	0	0	0	0	0	0	0
Total	1303,66	1383,51	12111,8	6758,71	19581,09	8930,6	0	50069,37

Tab. 5.2:
Geographical Analysis of Total Revenues
in Spain in 1997 in %

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Tab. 6.1: Analysis of Revenues by Subject Area in Spain in 1997 in National Currency

Subject Area	TYPE OF SUPPLIERS							
	Hosts retrospec.	Hosts realtime financial	Hosts realtime news	Other online distributors	CD-ROM distributors	Other offline distributors	Other suppliers	Total
Financial Information	38,34	1137,2	0	336,14	11,64	104,2	0	1627,52
Credit Information	15,06	0	0	2807,34	140	1086	0	4048,4
Business News	36,07	12,63	1184,77	127,92	27,4	7,4	0	1396,19
Other Business and Economic Information	55,17	12,63	165,21	671,41	324,47	218,5	0	1447,39
Scientific, Technical, Medical Information	8,45	6,32	152,35	74,61	3074,57	722,5	0	4038,8
Legal Information	205,71	0	7,9	53,18	3107,85	8,1	0	3382,74
Patent Information	331,57	0	0	3,64	35,93	0	0	371,14
Public Information	84,3	12,63	1108,09	129,12	181,01	119	0	1634,15
Consumer Information	9	183,15	9493,48	475,91	3027,37	387,9	0	13576,81
Other Subject Areas	8	18,95	0	536,29	11,6	2149,5	0	2724,34
Total	791,67	1383,51	12111,8	5215,56	9941,84	4803,1	0	34247,48

Tab. 7.1: Analysis of Revenues by User Groups in Spain in 1997 in National Currency

User Groups	TYPE OF SUPPLIERS							
	Hosts retrospec.	Hosts realtime financial	Hosts realtime news	Other online distributors	CD-ROM distributors	Other offline distributors	Other suppliers	Total
Financial Services	56,34	768,48	1172,79	1390,37	247,78	373,8	0	4009,56
Other Commercial Services	490,92	318,35	2189,28	1662,53	1271	1476,14	0	7408,22
Manufacturing	59,19	6,32	0	300,44	455,89	22,29	0	844,13
Other Business	20,33	248,36	7698,44	1313,81	3003,42	1763,53	0	14047,89
Education, Public, Research etc.	110,4	30	7,9	151,58	389,21	35,79	0	724,88
Government, Administration	40,65	12	1043,39	219,22	319,4	1129,74	0	2764,4
Private Households	13,84	0	0	186,21	1639,81	1,85	0	1841,71
Total	791,67	1383,51	12111,8	5224,16	7326,51	4803,14	0	31640,79

Tab. 8.1: Analysis of Revenues by Delivered Format in Spain in 1997 in National Currency

Type of Supplier / Delivered Format	TYPE OF SUPPLIERS							
	Hosts retrospec.	Hosts realtime financial	Hosts realtime news	Other online distributors	CD-ROM distributors	Other offline distributors	Other suppliers	Total
Multimedia								
- Type 1	34,00	30,00	0,00	609,00	6474,66	1784,30	0,00	8931,96
- Type 2	0,00	0,00	0,00	13,00	5761,30	134,00	0,00	5908,30
Total	34,00	30,00	0,00	622,00	12235,96	1918,30	0,00	14840,26

Tab. 8.2: Analysis of Revenues by Delivered Format in Spain in 1997 in %

Type of Supplier / Delivered Format	TYPE OF SUPPLIERS							
	Hosts retrospec.	Hosts realtime financial	Hosts realtime news	Other online distributors	CD-ROM distributors	Other offline distributors	Other suppliers	Total
Multimedia								
- Type 1	100,00	100,00	0,00	97,91	52,92	93,01	0,00	60,19
- Type 2	0,00	0,00	0,00	2,09	47,08	6,99	0,00	39,81
Total	100,00	100,00	0,00	100,00	100,00	100,00	0,00	100,00

Tab. 9: Internet-Engagement (WWW) in Spain in 1997/1998

Number of Suppliers / Revenues (national currency)	TYPE OF SUPPLIERS							
	Hosts retrospec.	Hosts realtime financial	Hosts realtime news	Other online distributors	CD-ROM distributors	Other offline distributors	Other suppliers	Total
Total answers	2	0	0	50	8	1	0	61
EIS in WWW 1997	2	0	0	45	6	1	0	54
ES in WWW 1997	1	0	0	38	5	0	0	44
Revenues from EIS in WWW 1997	21,15	0	0	2310,28	97,1	10	0	2438,53
Revenues from ES in WWW 1997	8,15	0	0	1306,18	20,9	0	0	1335,23

Tab. 10.1: Profitability (No. of Answers) in Spain in 1997 in Terms of Operating Costs

Number of Suppliers	TYPE OF SUPPLIERS							
	Hosts retrospec.	Hosts realtime financial	Hosts realtime news	Other online distributors	CD-ROM distributors	Other offline distributors	Other suppliers	Total
Total Answers	9	5	7	68	84	23	0	196
Yes	5	5	7	44	68	22	0	151
No	4	0	0	24	16	1	0	45
1998	0	0	0	12	4	0	0	16
1999	0	0	0	8	5	1	0	14
Later	3	0	0	1	5	0	0	9
Never	1	0	0	3	2	0	0	6

Tab. 10.2: Profitability (No. of Answers) in Spain in 1997 in Terms of Full Costs

Number of Suppliers	TYPE OF SUPPLIERS							
	Hosts retrospec.	Hosts realtime financial	Hosts realtime news	Other online distributors	CD-ROM distributors	Other offline distributors	Other suppliers	Total
Total Answers	9	5	7	68	84	23	0	196
Yes	3	4	5	18	47	18	0	95
No	6	1	2	50	37	5	0	101
1998	0	0	0	6	7	0	0	13
1999	0	0	2	23	12	3	0	40
Later	1	0	0	16	15	1	0	33
Never	5	0	0	5	3	1	0	14

Tables "Market 98"

Tab. 1: Response Rates in Spain in 1998

No. of and %	TYPE OF SUPPLIERS							
	Hosts retrospec.	Hosts realtime financial	Hosts realtime news	Other online distributors	CD-ROM distributors	Other offline distributors	Other suppliers	Total
Relevant organisations (a)	15	12	9	70	101	25	0	232
Responses (b)	10	6	4	58	61	17	0	156
Full usable responses * (c)	10	6	4	42	45	15	0	122
Response rate I in $\frac{(b)}{(a)}$	0,67	0,50	0,44	0,83	0,60	0,68	0	0,67
Response rate II $\frac{(c)}{(b)}$	0,67	0,50	0,44	0,60	0,45	0,60	0	0,53
Response rate III** in %	90	95	90	70	80	75		85

* Means: with revenue figures for EIS

** This ist not a formal response rate (as I and II) but a rate which indicates the representativity of the survey results in of the market segments which are covered by the full usable responses.

Tab. 2: Characterisation of Full Usable Respondents in Spain in 1998

	TYPE OF SUPPLIERS							
	Hosts retrospec.	Hosts realtime financial	Hosts realtime news	Other online distributors	CD-ROM distributors	Other offline distributors	Other suppliers	Total
No. of employees (full time equiv.)								0
% (est.) of total employees								0
Estimated no. of total employees								0

Total employees means estimated f.t.e. in all relevant organisations in the different supplier types in year per country.

Tab. 3: Human Resources (in Full-time Equivalents) in Spain in 1998

	TYPE OF SUPPLIERS							
	Hosts retrospec.	Hosts realtime financial	Hosts realtime news	Other online distributors	CD-ROM distributors	Other offline distributors	Other suppliers	Total
Total number of employees (f.t.e)	399,5	285	1391	830,5	1705,7	865,5	0	5477,2
Average Revenues per Employee (labour productivity)	12,96	58,22	8,44	10,37	15,16	11,49	0	14,23
Change in Employment (in %) 1997/94								
Change in Labour Productivity (in %) 1997/94								0

"Total number of employees" means the exact number from the questionnaires.

Tab. 4.1: Overall Revenues and Further Income (National Currency)
by Type of Suppliers and Type of Services/Products in Spain in 1998

Type of services/products	TYPE OF SUPPLIERS							
	Hosts retrospec.	Hosts realtime financial	Hosts realtime news	Other online distributors	CD-ROM distributors	Other offline distributors	Other suppliers	Total
Retrospec. online database s.	2957,26	10,00	487,36	4492,84	926,67	10,10	0,00	8884,23
Real-time financial s.	3,20	4833,96	0,00	41,74	0,00	0,00	0,00	4878,90
Real-time newswire s.	0,00	11084,50	11189,13	21,82	25,53	0,00	0,00	22320,98
Other online s.	887,40	90,50	53,75	1551,88	660,15	26,00	0,00	3269,68
CD-ROM s.	763,36	575,00	8,50	491,39	14925,94	715,00	0,00	17479,19
Other Offline s.	0,00	0,00	0,00	15,48	0,00	4924,20	0,00	4939,68
Total EIS (I)	4611,22	16593,96	11738,74	6615,15	16538,29	5675,30	0,00	61772,66

(to be continued on the following page)

**Tab. 4.1 (cont.): Overall Revenues and Further Income (National Currency)
by Type of Suppliers and Type of Services/Products in Spain in 1998**

Type of services/products	TYPE OF SUPPLIERS							
	Hosts retrospec.	Hosts realtime financial	Hosts realtime news	Other online distributors	CD-ROM distributors	Other offline distributors	Other suppliers	Total
Advertising s.	7,84	0	0	473,15	125,1	0	0	606,09
Transaction s.	0	0	0	131,26	0	0	0	131,26
Education s.	0	0	0	58,21	708,13	0	0	766,34
Entertainment	0	0	0	47,94	7875,41	135	0	8058,35
Software	494,17	0	0	347,69	607,04	4109,1	0	5558
Other types of ES	66,15	0	0	935,89	10,59	25,2	0	1037,83
Printed products	315,01	0	0	63,9	6898,6	41,78	0	7319,29
Information brokering	5,53	0	0	47,1	20,55	36,99	0	110,17
Training/seminars	1,34	0	0	97,45	33,96	6,75	0	139,5
Private subsidies	1,12	0	0	62,2	0	0	0	63,32
Public Subsidies	3,46	0	25	76,35	17,55	5,48	0	127,84
Other	103,14	0	0	185,28	114,36	22,5	0	425,28
Total II	5608,98	16593,96	11763,74	9141,57	32949,58	10058,10	0,00	86115,93

Tab. 4.2: Overall Revenues and Further Income
by Type of Suppliers and Type of Services/Products in Spain in 1998 in %

Type of services/products	TYPE OF SUPPLIERS							
	Hosts retrospec.	Hosts realtime financial	Hosts realtime news	Other online distributors	CD-ROM distributors	Other offline distributors	Other suppliers	Total
Retrospec. online database s.	52,72	0,06	4,14	49,15	2,81	0,10	0,00	10,32
Real-time financial s.	0,06	29,13	0,00	0,46	0,00	0,00	0,00	5,67
Real-time newswire s.	0,00	66,80	95,12	0,24	0,08	0,00	0,00	25,92
Other online s.	15,82	0,55	0,46	16,98	2,00	0,26	0,00	3,80
CD-ROM s.	13,61	3,47	0,07	5,38	45,30	7,11	0,00	20,30
Other Offline s.	0,00	0,00	0,00	0,17	0,00	48,96	0,00	5,74
Total EIS (I)	82,21	100,00	99,79	72,36	50,19	56,43	0,00	71,73

(to be continued on the following page)

Tab. 4.2 (cont.): Overall Revenues and Further Income by Type of Suppliers and Type of Services/Products in Spain in 1998 in %

Type of services/products	TYPE OF SUPPLIERS							
	Hosts retrospec.	Hosts realtime financial	Hosts realtime news	Other online distributors	CD-ROM distributors	Other offline distributors	Other suppliers	Total
Advertising s.	0,14	0,00	0,00	5,18	0,38	0,00	0,00	0,70
Transaction s.	0,00	0,00	0,00	1,44	0,00	0,00	0,00	0,15
Education s.	0,00	0,00	0,00	0,64	2,15	0,00	0,00	0,89
Entertainment s.	0,00	0,00	0,00	0,52	23,90	1,34	0,00	9,36
Software	8,81	0,00	0,00	3,80	1,84	40,85	0,00	6,45
Other types of ES	1,18	0,00	0,00	10,24	0,03	0,25	0,00	1,21
Printed products	5,62	0,00	0,00	0,70	20,94	0,42	0,00	8,50
Information brokering	0,10	0,00	0,00	0,52	0,06	0,37	0,00	0,13
Training/seminars	0,02	0,00	0,00	1,07	0,10	0,07	0,00	0,16
Private subsidies	0,02	0,00	0,00	0,68	0,00	0,00	0,00	0,07
Public subsidies	0,06	0,00	0,21	0,84	0,05	0,05	0,00	0,15
Others	1,84	0,00	0,00	2,03	0,35	0,22	0,00	0,49
Total II	100	100	100	100	100	100	0	100

Tab. 8.1: Analysis of Revenues by Delivered Format in Spain in 1998 in National Currency

Type of Supplier / Delivered Format	TYPE OF SUPPLIERS							
	Hosts retrospec.	Hosts realtime financial	Hosts realtime news	Other online distributors	CD-ROM distributors	Other offline distributors	Other suppliers	Total
Multimedia								
- Type 1	37,00	45,00	0,00	685,43	6255,12	2054,00	0,00	9076,55
- Type 2	0,00	0,00	0,00	103,88	7191,84	144,00	0,00	7439,72
Total	37,00	45,00	0,00	789,31	13446,96	2198,00	0,00	16516,27

Tab. 8.2: Analysis of Revenues by Delivered Format in Spain in 1998 in %

Type of Supplier / Delivered Format	TYPE OF SUPPLIERS							
	Hosts retrospec.	Hosts realtime financial	Hosts realtime news	Other online distributors	CD-ROM distributors	Other offline distributors	Other suppliers	Total
Multimedia								
- Type 1	100,00	100,00	0,00	86,84	46,52	93,45	0,00	54,96
- Type 2	0,00	0,00	0,00	13,16	53,48	6,55	0,00	45,04
Total	100,00	100,00	0,00	100,00	100,00	100,00	0,00	100,00

Tab. 9: Internet-Engagement (WWW) in Spain in 1997/1998

Number of Suppliers / Revenues (national currency)	TYPE OF SUPPLIERS							
	Hosts retrospec.	Hosts realtime financial	Hosts realtime news	Other online distributors	CD-ROM distributors	Other offline distributors	Other suppliers	Total
Total answers	8	0	0	54	22	1	0	85
EIS in WWW 1998	8	0	0	49	18	1	0	76
ES in WWW 1998	1	0	0	38	6	0	0	45
Revenues from EIS in WWW 1998	795,68	0	0	3835,07	319,78	10	0	4960,53
Revenues from ES in WWW 1998	8,36	0	0	1707,98	34,42	0	0	1750,76

Tables "Industry 98"

Tab. 1: Response Rates in Spain in 1998

No. of and %	TYPE OF SUPPLIERS							
	Hosts retrospec.	Hosts realtime financial	Hosts realtime news	Other online distributors	CD-ROM distributors	Other offline distributors	Other suppliers	Total
Relevant organisations (a)	9	5	7	69	86	23	0	199
Responses (b)	8	4	4	55	46	17	0	134
Full usable responses * (c)	8	4	4	39	38	15	0	108
Response rate I in $\frac{(b)}{(a)}$	0,89	0,80	0,57	0,80	0,53	0,74	0	0,67
Response rate II $\frac{(c)}{(b)}$	0,89	0,80	0,57	0,57	0,44	0,65	0	0,54
Response rate III** in %	95	100	95	75	85	80	0	90

* Means: with revenue figures for EIS

** This is not a formal response rate (as I and II) but a rate which indicates the representativity of the survey results in of the market segments which are covered by the full usable responses.

Tab. 2: Characterisation of Full Usable Respondents in Spain in 1998

	TYPE OF SUPPLIERS							
	Hosts retrospec.	Hosts realtime financial	Hosts realtime news	Other online distributors	CD-ROM distributors	Other offline distributors	Other suppliers	Total
No. of employees (full time equiv.)								0
% (est.) of total employees								0
Estimated no. of total employees								0

Total employees means estimated f.t.e. in all relevant organisations in the different supplier types in year per country.

Tab. 3: Human Resources (in Full-time Equivalents) in Spain in 1998

	TYPE OF SUPPLIERS							
	Hosts retrospec.	Hosts realtime financial	Hosts realtime news	Other online distributors	CD-ROM distributors	Other offline distributors	Other suppliers	Total
Total number of employees (f.t.e)	178,5	51	1391	813,5	1361,7	816,5	0	4612,2
Average Revenues per Employee (labour productivity)	8,15	30,1	8,87	10,76	15,4	10,78	0	11,68
Change in Employment (in %) 1997/94								0
Change in Labour Productivity (in %) 1997/94								0

"Total number of employees" means the exact number from the questionnaires.

Tab. 4.1: Overall Revenues and Further Income (National Currency)
by Type of Suppliers and Type of Services/Products in Spain in 1998

Type of services/products	TYPE OF SUPPLIERS							
	Hosts retrospec.	Hosts realtime financial	Hosts realtime news	Other online distributors	CD-ROM distributors	Other offline distributors	Other suppliers	Total
Retrospec. online database s.	655,03	10,00	530,00	4576,87	402,65	10,10	0,00	6184,65
Real-time financial s.	3,20	1275,24	0,00	41,74	0,00	0,00	0,00	1320,18
Real-time newswire s.	0,00	159,50	11740,75	21,82	31,20	0,00	0,00	11953,27
Other online s.	26,53	90,50	53,75	1597,91	380,32	26,00	0,00	2175,01
CD-ROM s.	196,84	0,00	8,50	504,03	10470,07	0,00	0,00	11179,44
Other Offline s.	0,00	0,00	0,00	15,48	0,00	4924,20	0,00	4939,68
Total EIS (I)	881,60	1535,24	12333,00	6757,85	11284,24	4960,30	0,00	37752,23

(to be continued on the following page)

**Tab. 4.1 (cont.): Overall Revenues and Further Income (National Currency)
by Type of Suppliers and Type of Services/Products in Spain in 1998**

Type of services/products	TYPE OF SUPPLIERS							
	Hosts retrospec.	Hosts realtime financial	Hosts realtime news	Other online distributors	CD-ROM distributors	Other offline distributors	Other suppliers	Total
Advertising s.	7,99	0	0	473,18	125,1	0	0	606,27
Transaction s.	0	0	0	131,26	0	0	0	131,26
Education s.	0	0	0	58,21	773,08	0	0	831,29
Entertainment	0	0	0	47,94	8155,35	135	0	8338,29
Software	499,11	0	0	347,69	625,16	3684,1	0	5156,06
Other types of ES	66,9	0	0	936,36	11,25	25,2	0	1039,71
Printed products	95,55	0	0	63,9	6372,8	41,78	0	6574,03
Information brokering	3,85	0	0	47,1	20,55	36,99	0	108,49
Training/seminars	0	0	0	97,45	33,96	6,75	0	138,16
Private subsidies	0	0	0	62,2	0	0	0	62,2
Public Subsidies	2	0	25	76,35	17,55	5,48	0	126,38
Other	100	0	0	185,28	114,36	22,5	0	422,14
Total II	1657,00	1535,24	12358,00	9284,77	27533,40	8918,10	0,00	61286,51

Tab. 4.2: Overall Revenues and Further Income
by Type of Suppliers and Type of Services/Products in Spain in 1998 in %

Type of services/products	TYPE OF SUPPLIERS							
	Hosts retrospec.	Hosts realtime financial	Hosts realtime news	Other online distributors	CD-ROM distributors	Other offline distributors	Other suppliers	Total
Retrospec. online database s.	39,53	0,65	4,29	49,29	1,46	0,11	0,00	10,09
Real-time financial s.	0,19	83,06	0,00	0,45	0,00	0,00	0,00	2,15
Real-time newswire s.	0,00	10,39	95,01	0,24	0,11	0,00	0,00	19,50
Other online s.	1,60	5,89	0,43	17,21	1,38	0,29	0,00	3,55
CD-ROM s.	11,88	0,00	0,07	5,43	38,03	0,00	0,00	18,24
Other Offline s.	0,00	0,00	0,00	0,17	0,00	55,22	0,00	8,06
Total EIS (I)	53,20	100,00	99,80	72,78	40,98	55,62	0,00	61,60

(to be continued on the following page)

Tab. 4.2 (cont.): Overall Revenues and Further Income by Type of Suppliers and Type of Services/Products in Spain in 1998 in %

Type of services/products	TYPE OF SUPPLIERS							
	Hosts retrospec.	Hosts realtime financial	Hosts realtime news	Other online distributors	CD-ROM distributors	Other offline distributors	Other suppliers	Total
Advertising s.	0,48	0,00	0,00	5,10	0,45	0,00	0,00	0,99
Transaction s.	0,00	0,00	0,00	1,41	0,00	0,00	0,00	0,21
Education s.	0,00	0,00	0,00	0,63	2,81	0,00	0,00	1,36
Entertainment s.	0,00	0,00	0,00	0,52	29,62	1,51	0,00	13,61
Software	30,12	0,00	0,00	3,74	2,27	41,31	0,00	8,41
Other types of ES	4,04	0,00	0,00	10,08	0,04	0,28	0,00	1,70
Printed products	5,77	0,00	0,00	0,69	23,15	0,47	0,00	10,73
Information brokering	0,23	0,00	0,00	0,51	0,07	0,41	0,00	0,18
Training/seminars	0,00	0,00	0,00	1,05	0,12	0,08	0,00	0,23
Private subsidies	0,00	0,00	0,00	0,67	0,00	0,00	0,00	0,10
Public subsidies	0,12	0,00	0,20	0,82	0,06	0,06	0,00	0,21
Others	6,04	0,00	0,00	2,00	0,42	0,25	0,00	0,69
Total II	100	100	100	100	100	100	0	100

Tab. 8.1: Analysis of Revenues by Delivered Format in Spain in 1998 in National Currency

Type of Supplier / Delivered Format	TYPE OF SUPPLIERS							
	Hosts retrospec.	Hosts realtime financial	Hosts realtime news	Other online distributors	CD-ROM distributors	Other offline distributors	Other suppliers	Total
Multimedia								
- Type 1	37,00	45,00	0,00	661,43	5927,96	1848,00	0,00	8519,39
- Type 2	0,00	0,00	0,00	95,88	7075,80	144,00	0,00	7315,68
Total	37,00	45,00	0,00	757,31	13003,76	1992,00	0,00	15835,07

Tab. 8.2: Analysis of Revenues by Delivered Format in Spain in 1998 in %

Type of Supplier / Delivered Format	TYPE OF SUPPLIERS							
	Hosts retrospec.	Hosts realtime financial	Hosts realtime news	Other online distributors	CD-ROM distributors	Other offline distributors	Other suppliers	Total
Multimedia								
- Type 1	100,00	100,00	0,00	87,34	45,59	92,77	0,00	53,80
- Type 2	0,00	0,00	0,00	12,66	54,41	7,23	0,00	46,20
Total	100,00	100,00	0,00	100,00	100,00	100,00	0,00	100,00

Tab. 9:

Internet-Engagement (WWW) in Spain in 1997/1998

Number of Suppliers / Revenues (national currency)	TYPE OF SUPPLIERS							
	Hosts retrospec.	Hosts realtime financial	Hosts realtime news	Other online distributors	CD-ROM distributors	Other offline distributors	Other suppliers	Total
Total answers	5	0	0	53	19	1	0	78
EIS in WWW 1998	5	0	0	48	15	1	0	69
ES in WWW 1998	1	0	0	38	6	0	0	45
Revenues from EIS in WWW 1998	139,68	0	0	3803,07	206,78	10	0	4159,53
Revenues from ES in WWW 1998	8,36	0	0	1707,98	34,42	0	0	1750,76

Annex

Questionnaire in Spanish



Proveedores de productos y servicios de información electrónica España. 1997.

Informe MSStudy II de la Comisión Europea

Cuestionario sometido a secreto estadístico
(Art. 13, Ley 12/89 de la Función Estadística Pública)

Período de referencia:

Del 1 de enero de 1997 al 31 de diciembre de 1997

Este estudio intenta medir el valor monetario del mercado de los contenidos informativos en soportes o medios electrónicos o digitales (online, cd-rom, etc.). Por lo tanto, este cuestionario está dirigido a los proveedores y distribuidores de información electrónica no gratuita, tanto organismos de las administraciones públicas (siempre que facturen algo por los servicios) como empresas privadas.

Importante:

Las empresas y organismos españoles tienen que anotar todas sus actividades dentro y fuera de España. Los extranjeros sólo sus actividades en España.

Por favor, conteste todas las preguntas de la forma más completa posible. Al final del cuestionario encontrará definiciones de algunos conceptos. Si necesita más ayuda, no dude en ponerse en contacto con nosotros.

Indique los datos monetarios en **pesetas** (deducidos los impuestos, si ello es aplicable) y, por favor, cífase exclusivamente al año 1997.

Envíe este cuestionario debidamente relleno a:

Tomás Baiget

Instituto de Estadística de Catalunya

Subdirección de Asistencia Técnica Estadística

Vía Laietana 58

08003 Barcelona

Teléfono: 934 120 088; fax: 934 123 145

baiget@idescat.es

¿Qué productos y servicios se incluyen en esta encuesta?

El presente estudio se enfoca a un segmento de actividad económica muy específico: producción, distribución y comercialización de

información electrónica para uso profesional de acceso público no gratuito

cuyas características se han acordado con otros países del Área Económica Europea para poder establecer comparaciones.

Sin embargo si su empresa u organización obtiene **además** ingresos por su actividad en otras áreas (p. ej., edición impresa, telecomunicaciones, provisión de acceso a internet, venta de software, webs, infografía, publicidad, servicios de ocio, transacciones, proyectos, formación, etc.) también nos interesan sus datos pues nos permitirán evaluar el grado de diversificación del sector de la información.

Productos y servicios que en principio NO están incluidos en este estudio si constituyen la única actividad de la organización:

-Gratuitos para los usuarios (p. ej. catálogos de biblioteca, webs de internet de acceso libre, bases de datos de las administraciones públicas sin ningún tipo de tarifa, etc.).

-Servicios sólo de telecomunicaciones en los cuales no cuenta el valor de la información transmitida (contenido).

-Información para uso interno, bases de datos privadas o de acceso restringido. Intranets.

-Bases de datos y archivos informatizados sin entidad propia que sólo son etapas intermedias o herramientas para la producción de otras obras digitalizadas o impresas (excepción: sí que se tienen en cuenta los bancos y bases de datos de imágenes y documentos, de los cuales se sirvan copias impresas o digitalizadas bajo pedido y previo pago).

-Radiodifundidos por antena de TV y accesibles a todo el público (teletext).

-Televisión, ni analógica ni digital. Vídeo y audio *cassettes* de cine y música para el ocio.

-Gestión de llamadas telefónicas. Encuestas por teléfono.

-Transacciones bancarias, telebanco o banco en casa, cajeros automáticos, *EDI* (*electronic data interchange*), reservas de hoteles y viajes, etc.

1. Datos de identificación del organismo o empresa
(situación en 1997)

Nombre de la entidad:

.....
.....

Actividad principal (por favor, envíenos juntamente con este cuestionario también sus folletos y su memoria anual):

.....
.....

Persona de contacto:

.....

Dirección:

.....
.....

Código postal: Ciudad:

Provincia: Comunidad autónoma:

Teléfonos. (Ex)prefijo provincial:

Número(s):

Fax:

Correo electrónico:

URL. Http://

Nombre del organismo superior del cual depende:

.....

Nombre de las empresas filiales, agencias o departamentos incluidos en las respuestas de este cuestionario:

.....

Tipo de organismo:

1. () empresa privada
2. () administración pública, incluidas las universidades
3. () semipública (p. ej. cámaras de comercio, asociaciones profesionales)

2. Tipos de actividad en el campo de la información

Indique qué tipos de productos / servicios electrónicos de información **vende** su institución y por qué medios los distribuye. **Subraye o haga un círculo en los principales:**

	Producción	Distribución	Marketing / promoción de productos de información electrónicos (incluida la función de agente comercial)
• <u>Online (a través de las redes)</u>			
bases de datos	()	()	()
información financiera	()	()	()
agencia de noticias	()	()	()
páginas web	()	()	()
.....	()	()	()
Suministro por correo electrónico			
venta de noticias, servicio de puesta al día, venta de libros y documentos...		()	()
Suministro por fax			
venta de noticias, servicio de puesta al día, venta de documentos...		()	()
• <u>Offline (cd-rom, disquete, DVD...)</u>			
bases de datos	()	()	()
información profesional (enciclopedias, cursos, guías, directorios...)	()	()	()
ocio (literatura, juegos...)	()	()	()
software	()	()	()
.....	()	()	()
• <u>Otros medios o soportes</u>			
impreso en papel	()	()	()
microficha o microfilm	()	()	()
.....	()	()	()

3. Personal

Número aproximado de personas relacionadas con los servicios de información electrónica (a dedicación completa o equivalentes: p. ej. 2 personas a media jornada son equivalentes a 1 persona a dedicación completa)

1997	1998
	(estimado)
_____	_____

4. Ingresos

Ingresos por ventas de servicios electrónicos

Por favor anote aquí el total de los apartados _____ PTA _____ PTA
4.1 (información) y 4.2 (otros servicios electrónicos)

4.1. Desglose aprox. de las ventas de información electrónica (en %)

1997	1998 (estimado)
------	-----------------

Total de las ventas de información electrónica _____ PTA _____ PTA

• Online (a través de las redes)

bases de datos con información retrospectiva (bibliográficas, directorios, texto completo, numéricas, factuales, etc.)%%
--	--------	--------

información financiera en tiempo real%%
---------------------------------------	--------	--------

agencia de noticias en tiempo real%%
------------------------------------	--------	--------

páginas web%%
-------------	--------	--------

.....%%
-------	--------	--------

Suministro por correo electrónico

venta de noticias, servicio de puesta al día, venta de libros y documentos...%%
--	--------	--------

Suministro por fax

venta de noticias, servicio de puesta al día, venta de documentos, etc.%%
--	--------	--------

• Offline (cd-rom, disquete, DVD...)

bases de datos%%
----------------	--------	--------

otra información profesional (enciclopedias, cursos, guías, directorios...)%%
---	--------	--------

.....%%
-------	--------	--------

100%	100%
------	------

4.2. Desglose aprox. de las ventas de otros servicios electrónicos (en %) (online y cd-rom)

	1997	1998 (estimado)
Total de las ventas de otros servicios electrónicos	_____ PTA	_____ PTA
Publicidad electrónica (diseño de anuncios, mantenimiento de <i>banners</i> y publicidad en servicios de información electrónica)%%
Transacciones electrónicas (compras / ventas, comisiones)%%
Educación electrónica, cursos%%
Ocio (literatura, juegos)%%
Software%%
Otros tipos de servicios electrónicos (por favor, especifíquelos)		
.....%%
	100%	100%

4.3. Otras fuentes no electrónicas de ingresos

	1997	1998 (estimado)
4.3.1. Total en pesetas	_____ PTA	_____ PTA

4.3.2. Desglose en %

Productos impresos%%
Venta de consultas a terceros (<i>broker</i>)%%
Formación / seminarios%%
Subvenciones recibidas de otras empresas%%
Subvenciones de las administraciones públicas%%
Otras fuentes de ingresos (por favor, especifique)%%
	100%	100%

5. Quiénes son sus clientes / usuarios, por grupos

Haga una estimación en % por grupos de clientes de sus ventas de servicios electrónicos (4.1 + 4.2)

1997

Empresas

Bancos, financieras, seguros%
Otros servicios (comercios, consultoras, etc.)%
Industrias manufactureras%
Otras empresas%

Administraciones públicas

Educación, investigación, bibliotecas%
Gobierno y sus agencias%

Domicilios privados (consumidores)

100%

6. Áreas temáticas

Haga una estimación en % por temas de sus ventas de servicios electrónicos (4.1 + 4.2)

1997

I. Información económica para empresas

- Información financiera%
- Información sobre crédito%
- Noticias (temas económicos)%
- Otra información de interés empresarial (directorios, catálogos, bibliografías...)%

II. Información científica, técnica y médica

III. Información legal

IV. Información sobre patentes y marcas

V. Información pública (sobre las administraciones)
-excepto información legal, científica, etc.

VI. Información orientada a los consumidores

- Noticias (de tipo general)
- Otra información para el consumidor (turística, ocio, para compras, etc.)

VII. Información sobre otras áreas temáticas

- Por favor especifíquelas

100%

7. Multimedia

1997

1998
(estimado)

Ingresos totales

_____ PTA _____ PTA

Desglose sus ingresos anteriores en % según tipo de multimedia:

- Texto con gráficos, tablas y/o imágenes fijas
 - Texto con audio y/o vídeo, (imágenes en movimiento)
- 100% 100%

8. Internet (sólo si su empresa vende servicios electrónicos a través de World Wide Web)

1997

1998 (estimado)

Total de sus ventas

_____ PTA _____ PTA

Ventas de información

.....%

Ventas de otros servicios electrónicos
Por favor especifíquelos:

.....%

100% 100%

9. Exportación de información electrónica

1997

I. Total de las exportaciones

_____ PTA

II. Desglose por regiones

Europa

- Unión Europea (+ Noruega e Islandia)%

- Suiza%

- Europa del Este%

América

- Estados Unidos%

- Canadá%

- Latinoamérica%

Asia

- Japón%

- Otros países asiáticos%

Otros países%

10. Beneficios

10.1. ¿Obtuvieron beneficios de sus servicios de información electrónica en 1997?

	Sí	No
Sólo recuperamos los costes de operación	()	()
Recuperamos todos los costes, incluso las inversiones	()	()

10.2. En caso negativo ¿cuándo esperan recuperar los costes de sus servicios de información electrónica?

	1998	1999	Más tarde	Nunca
Los costes operativos	()	()	()	()
Los costes totales	()	()	()	()

Muchas gracias por su cooperación

Definiciones.

Audiotex = servicio *online* en los que los usuarios reciben información oralmente.

Broker de información = persona o institución que realiza servicios de información a cuenta de terceros aplicando unas tarifas.

Distribuidor *offline* = organización que vende o alquila productos o servicios de información electrónica en unidades concretas como cd-rom, cd-i, disquete, *cassette*, cinta magnética, boletín o revista electrónicos, etc., sin usar las redes de telecomunicaciones.

Distribuidor *online* de bases de datos retrospectivas = *host* clásico, servicio que suministra acceso a bases de datos que pueden contener diferentes tipos de información (bibliográfica, factual, numérica, texto completo, imágenes, etc.), en varias áreas (científica, técnica, legal, prensa, finanzas, empresarial, estadística, etc.) y relativa a diversos períodos de tiempo retrospectivos. Se incluyen también aquí los directorios y catálogos.

Equivalentes a dedicación completa = suma del personal que trabaja a jornada completa (con dedicación plena) más la suma de las fracciones de tiempo del personal que trabaja a dedicación parcial.

Información científica / técnica / médica = además de la explicitada, se incluye aquí la información de patentes y normas, y cualquier producto o servicio de información científica -tanto general como especializada-.

Información económica y de negocios = incluye noticias sobre empresas y negocios, crédito, concursos y oportunidades comerciales, datos de mercados, cotizaciones, propiedad inmobiliaria, servicios de información -tanto general como especializada- para la industria, etc.

Información en tiempo real = información que se actualiza inmediatamente a medida que se produce. Para los fines de este estudio la definición se extiende a todos los servicios *online* que se actualizan más de una vez al día.

Offline = suministro de un servicio sin usar telecomunicaciones, p. ej., en soportes ópticos y magnéticos.

Online = suministro de un servicio a través de las redes de telecomunicaciones.

Productor de base de datos = organización que elabora bases de datos para ser distribuidas *online* y/u *offline*.

Publicidad electrónica = anuncio de productos y servicios en medios electrónicos. Ejemplos: *banners* en webs, webs y cd-roms de promoción, diseño de páginas publicitarias, etc.

Servicios electrónicos = ofrecen información, publicidad, transacciones, ocio, comunicación, etc., tanto por medios *online* como *offline*.

Servicios de información electrónica o digitalizada = todos los que suministran información a través de un medio no impreso ni oral. La entrega puede ser *online* u *offline*.

Servicios de puesta al día (SDI) = servicios continuados de alerta informativa, perfiles, distribución selectiva de información (*selective dissemination of information, SDI*) a partir de bases de datos o de otras fuentes electrónicas. Canales y tecnologías *push*.

Servicios de transacciones electrónicas = su principal objetivo es permitir o facilitar compras, ventas, reservas y actividad bancaria, más que suministrar información (actividad que obviamente también realizan pero como un medio para posibilitar la transacción).

Soportes magnéticos = cintas, discos y disquetes que usan tecnologías magnéticas per almacenar información.

Soportes ópticos = discos que usan tecnologías ópticas, digitales o analógicas, para almacenar información, como cd-rom, cd-i, cd-r, DVD, etc.

Suministro de documentos = entrega de copias de documentos completos, impresas en papel o microficha (*computer output microform, COM*) o en cualquier soporte electrónico, obtenidas a partir de soportes electrónicos (bases de datos, cd-roms, documentos escaneados o digitalizados, etc.).

Videotex = servicio de información *online* en páginas o pantallas en vez de carácter a carácter.

Annex

Questionnaire in Catalan

Proveïdors de productes i serveis d'informació electrònica Espanya 1997

Informe MSStudy II de la Comissió Europea

Qüestionari sotmès a secret estadístic (Art. 30, Llei 14/87 d'estadística de Catalunya)

Període de referència:

De l'1 de gener de 1997 al 31 de desembre de 1997

Aquest estudi intenta mesurar el valor monetari del mercat dels continguts informatius en suports i mitjans electrònics o digitals (online, cd-rom, etc.). Per tant, aquest qüestionari està dirigit als proveïdors i distribuïdors d'informació electrònica no gratuïta, tant a organismes de les administracions públiques (sempre que facturin alguna cosa pels serveis) com a empreses privades.

Important: les empreses i organismes espanyols han d'anotar totes les seves activitats dins i fora d'Espanya. Els estrangers sols les activitats a Espanya.
--

Si us plau, contesteu totes les preguntes de la forma més completa possible. Al final del qüestionari trobareu definicions d'alguns conceptes. Si necessiteu més ajuda, no dubteu a posar-vos en contacte amb nosaltres.

Indiqueu les dades monetàries en **pessetes** (deduïts els impostos, si això és aplicable) i, si us plau, centreu-vos exclusivament en l'any 1997.

Retorneu aquest qüestionari degudament contestat a:

Tomàs Baiget

Institut d'Estadística de Catalunya

Subdirecció d'Assistència Tècnica Estadística

Via Laietana 58

08003 Barcelona

Telèfon: 934 120 088; fax: 934 123 145

baiget@idescat.es

Quins productes i serveis s'inclouen en aquesta enquesta?

El present estudi s'enfoca a un segment d'activitat econòmica molt específic: producció, distribució i comercialització d'

informació electrònica per a ús professional d'accés públic no gratuït

que s'ha acordat amb altres països de l'Àrea Econòmica Europea per poder establir comparacions.

No obstant això, si la vostra empresa o organització obté **a més** ingressos per l'activitat en altres àrees (p. ex., edició impresa, telecomunicacions, provisió d'accés a internet, venda de software, webs, infografia, publicitat, serveis d'oci, transaccions, projectes, formació, etc.) també ens interessen les vostres dades ja que ens permetran avaluar el grau de diversificació del sector de la informació.

Productes i serveis que en principi NO s'inclouen en aquest estudi si constitueixen l'única activitat de l'organització:

-Gratuïts per als usuaris (p. ex. catàlegs de biblioteca, webs d'internet d'accés lliure, bases de dades de les administracions públiques sense cap tipus de tarifa, etc.).

-Serveis sols de telecomunicacions en els quals no compta el valor de la informació transmesa (contingut).

-Informació per a ús intern, bases de dades privades o d'accés restringit. Intranets.

-Bases de dades i arxius informatitzats sense entitat pròpia que sols són etapes intermèdies o eines per a la producció d'altres obres digitalitzades o impreses (excepció: sí que es tenen en compte els bancs i bases de dades d'imatges i documents, dels quals se serveixen còpies impreses o digitalitzades per mitjà de comanda i previ pagament).

-Radiodifusos per antena de TV i accessibles a tot el públic (teletext).

-Televisió, ni analògica ni digital. Vídeo i àudio cassetts de cine i música per a l'oci.

-Gestió de trucades telefòniques. Enquestes per telèfon.

-Transaccions bancàries, telebanc o banc a casa, caixers automàtics, EDI (electronic data interchange), reserves d'hotels i viatges, etc.

1. Dades d'identificació de l'organisme o empresa
(situació el 1997)

Nom de l'entitat:

Activitat principal (si us plau, envieu-nos juntament amb aquest qüestionari també els vostres fullets i la memòria anual):

.....

Persona de contacte:

Adreça:

Codi postal: Ciutat:

Província: Comunitat autònoma:

Telèfons. Prefix provincial:

Número(s):

Fax:

Correu electrònic:

URL. Http://

Nom de l'organisme superior del qual depèn:

.....

Nom de les empreses filials, agències o departaments inclosos en les respostes d'aquest qüestionari:

.....

Tipus d'organisme:

1. () empresa privada
2. () administració pública, incloses les universitats
3. () semipública (p. ex. cambres de comerç, associacions professionals)

2. Tipus d'activitat en el camp de la informació

Indiqueu quins tipus de productes / serveis electrònics d'informació **ven** la vostra institució i per quins mitjans els distribueix. **Subratlleu o feu un cercle en els principals:**

	Producció	Distribució	Màrqueting / promoció de productes d'informació electrònics (inclosa la funció d'agent comercial)
• <u>Online (a través de les xarxes)</u>			
bases de dades	()	()	()
informació financera	()	()	()
agència de notícies	()	()	()
pàgines web	()	()	()
.....	()	()	()
Subministrament per correu electrònic venda de notícies, servei de posada al dia, venda de llibres i documents...			
		()	()
Subministrament per fax venda de notícies, servei de posada al dia, venda de documents...			
		()	()
• <u>Offline (cd-rom, disquet, DVD...)</u>			
bases de dades	()	()	()
informació professional (enciclopèdies, cursos, guies, directoris...)	()	()	()
oci (literatura, jocs...)	()	()	()
software	()	()	()
.....	()	()	()
• <u>Altres mitjans o suports</u>			
imprès en paper	()	()	()
microfitxa o microfilm	()	()	()
.....	()	()	()

3. Personal

Nombre aproximat de persones relacionades amb els serveis d'informació electrònica (amb dedicació completa o equivalents: p. ex. dues persones a mitja jornada són equivalents a una persona amb dedicació completa)

1997	1998 (estimació)
_____	_____

4. Ingressos

Ingressos per vendes de serveis electrònics

1997	1998 (estimació)
_____ PTA	_____ PTA

Si us plau poseu aquí el total dels apartats
4.1 (informació) i 4.2 (altres serveis electrònics)

4.1. Desglossament aprox. de les vendes d'informació electrònica (en %)

Total de les vendes d'informació electrònica _____ PTA _____ PTA

• Online (a través de les xarxes)

bases de dades amb informació retrospectiva (bibliogràfiques, directoris, text complet, numèriques, factuais, etc.)%%
---	--------	--------

informació financera en temps real%%
------------------------------------	--------	--------

agència de notícies en temps real%%
-----------------------------------	--------	--------

pàgines web%%
-------------	--------	--------

.....%%
-------	--------	--------

Subministrament per correu electrònic
venda de notícies, servei de posada al dia,
venda de llibres i documents...

.....%%
--------	--------

Subministrament per fax
venda de notícies, servei de posada al dia,
venda de documents...

.....%%
--------	--------

• Offline (cd-rom, disquet, DVD...)

bases de dades%%
----------------	--------	--------

altres tipus d'informació professional (enciclopèdies, cursos, guies, directoris...)%%
--	--------	--------

.....%%
-------	--------	--------

100%

100%

4.2. Desglossament aprox. de les vendes d'altres serveis electrònics online i cd-rom (en %)

	1997	1998 (estimació)
Total de les vendes d'altres serveis electrònics:	_____ PTA	_____ PTA
Publicitat electrònica (disseny d'anuncis, manteniment de banners i publicitat en serveis d'informació electrònica)%%
Transaccions electròniques (compres / vendes, comissions)%%
Educació electrònica, cursos%%
Oci (literatura, jocs)%%
Software%%
Altres tipus de serveis electrònics (si us plau, especifiqueu-los)%%
.....%%
	100%	100%

4.3. Altres fonts (no electròniques) d'ingressos

	1997	1998 (estimació)
4.3.1. Total en pessetes	_____ PTA	_____ PTA

4.3.2. Desglossament en %

Productes impresos%%
Venda de consultes a tercers (broker)%%
Formació / seminaris%%
Subvencions rebudes d'altres empreses%%
Subvencions de les administracions públiques%%
Altres fonts d'ingressos (si us plau, especifiqueu-les)%%
	100%	100%

5. Qui són els vostres clients / usuaris, per grups

Feu una estimació en % per grups dels vostres clients de les vendes de serveis electrònics (4.1 + 4.2)

1997

Empreses

Bancs, financeres, assegurances%
Altres serveis (comerços, consultores, etc.)%
Indústries manufactureres%
Altres empreses%

Administracions públiques

Educació, investigació, biblioteques%
Govern i les seves agències%

Llars privades (consumidors)

.....%

100%

6. Àrees temàtiques

Feu una estimació en % per temes de les vostres vendes de serveis electrònics (4.1 + 4.2)

1997

I. Informació econòmica per a empreses

- Informació financera%
- Informació sobre crèdit%
- Notícies (temes econòmics)%
- Altres informacions d'interès empresarial (directoris, catàlegs, bibliografies...)%

II. Informació científica, tècnica i mèdica

.....%

III. Informació legal

.....%

IV. Informació sobre patents i marques

.....%

V. Informació pública (sobre les administracions) excepte informació legal, científica, etc.

.....%

VI. Informació orientada als consumidors

- Notícies (de tipus general)%
- Altres tipus d'informació per al consumidor
(turística, oci, per a compres, etc.)%

VII. Informació sobre altres àrees temàtiques

- Si us plau especifiqueu-les%

100%

7. Multimèdia

1997

1998

(estimació)

Ingressos totals

_____ PTA _____ PTA

Desglosseu els vostres ingressos anteriors en % segons el tipus de multimèdia:

- | | | |
|--|--------|--------|
| - Text amb gràfics,
taules i/o imatges fixes |% |% |
| - Text amb àudio i/o vídeo,
(imatges en moviment) |% |% |
| | 100% | 100% |

8. Internet (sols si la vostra empresa ven serveis electrònics a través de World Wide Web)

1997

1998

(estimació)

Total de les vostres vendes

_____ PTA _____ PTA

Vendes d'informació

.....%

Vendes d'altres serveis electrònics

Si us plau, especifiqueu-los:

.....%%
	100%	100%

9. Exportació d'informació electrònica

1997

I. Total de les exportacions

_____ PTA

II. Desglossament per regions

Europa

- Unió Europea (+ Noruega i Islàndia)%

- Suïssa%

- Europa de l'Est%

Amèrica

- Estats Units%

- Canadà%

- Llatinoamèrica%

Àsia

- Japó%

- Altres països asiàtics%

Altres països%

10. Beneficis

10.1. Vau obtenir beneficis dels vostres serveis d'informació electrònica el 1997?

	Sí	No
Sols vàrem recuperar els costos d'operació	()	()
Vàrem recuperar tots els costos, incloses les inversions	()	()

10.2. En cas negatiu, quan espereu recuperar els costos dels vostres serveis d'informació electrònica?

	1998	1999	Més tard	Mai
Els costos operatius	()	()	()	()
Els costos totals	()	()	()	()

Moltes gràcies per la vostra cooperació

Definicions.

Audiotex = servei online en el qual els usuaris reben informació oralment.

Broker d'informació = persona o institució que realitza serveis d'informació a compte de tercers aplicant unes tarifes.

Distribuïdor offline = organització que ven o lloga productes o serveis d'informació electrònica en unitats concretes com ara cd-rom, cd-i, disquet, casset, cinta magnètica, butlletí o revista electrònica, etc., sense usar les xarxes de telecomunicacions.

Distribuïdor online de bases de dades retrospectives = host clàssic, servei que subministra accés a bases de dades que poden contenir diferents tipus d'informació (bibliogràfica, factual, numèrica, text complet, imatges, etc.), en diverses àrees (científica, tècnica, legal, premsa, finances, empresarial, estadística, etc.) i relativa a diversos períodes de temps retrospectius. S'inclouen també aquí els directoris i catàlegs.

Equivalents a dedicació completa = suma del personal que treballa a jornada completa (amb dedicació plena) més la suma de les fraccions de temps del personal que treballa a dedicació parcial.

Informació científica / tècnica / mèdica = a més de l'explicitada, s'inclou aquí la informació de patents i normes, i qualsevol producte o servei d'informació científica -tant general com especialitzada-.

Informació econòmica i de negocis = inclou notícies sobre empreses i negocis, crèdit, concursos i oportunitats comercials, dades de mercats, cotitzacions, propietat immobiliària, serveis d'informació -tant general com especialitzada- per a la indústria, etc.

Informació en temps real = informació que s'actualitza immediatament a mesura que es produeix. Per als objectius d'aquest estudi la definició s'estén a tots els serveis online que s'actualitzen més d'una vegada al dia.

Offline = subministrament d'un servei sense usar telecomunicacions, p. ex., en suports òptics i magnètics.

Online = subministrament d'un servei a través de les xarxes de telecomunicacions.

Productor de bases de dades = organització que elabora bases de dades per ser distribuïdes online i/o offline.

Publicitat electrònica = anunci de productes i serveis per mitjans electrònics. Exemples: banners en webs, webs i cd-roms de promoció, disseny de pàgines publicitàries, etc.

Serveis electrònics = ofereixen informació, publicitat, transaccions, oci, comunicació, etc., tant per mitjans online com offline.

Serveis d'informació electrònica o digitalitzada = tots els que subministren informació en un mitjà no imprès ni oral. L'entrega pot ser online o offline.

Serveis de posada al dia (SDI) = serveis continuats d'alerta informativa, perfils, distribució selectiva d'informació (selective dissemination of information, SDI) a partir de bases de dades o d'altres fonts electròniques. Canals i tecnologies push.

Serveis de transaccions electròniques = el seu objectiu principal és permetre o facilitar compres, vendes, reserves i activitat bancària, més que subministrar informació (activitat que obviament també realitzen però com un mitjà per possibilitar la transacció).

Suports magnètics = cintes, discos i disquets que usen tecnologies magnètiques per emmagatzemar informació.

Suports òptics = discos que usen tecnologies òptiques, digitals o analògiques, per emmagatzemar informació, com ara cd-rom, cd-i, cd-r, DVD, etc.

Subministrament de documents = entrega de còpies de documents complets, impreses en paper o microfitxa (computer output microform, COM) o en qualsevol suport electrònic, obtingudes a partir de suports electrònics (bases de dades, cd-rom, documents escanejats o digitalitzats, etc.).

Videotex = servei d'informació online en pàgines o pantalles en comptes de caràcter a caràcter.

