



DIGITAL GOV' 2017



**DIGITAL GOVERNMENT BAROMETER: THE DIGITALISATION
OF THE PUBLIC SERVICES IN FOUR EUROPEAN COUNTRIES**

November 2017

Partnership with

GAME CHANGERS



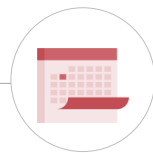
sopra  steria

METHODOLOGICAL NOTICE



SAMPLE

4001 respondents in four countries interviewed via Ipsos online access panel.



FIELD DATES

From September 25th to October 4th 2017.



METHODOLOGY

Quota Sampling: Gender, Age, profession of the interviewee, region and marketsize.

READING NOTE

=/ +/-

Evolution compared to 2016



New question in 2017



This report was prepared in compliance with the international standard ISO 20252 «Market, opinion and social research »

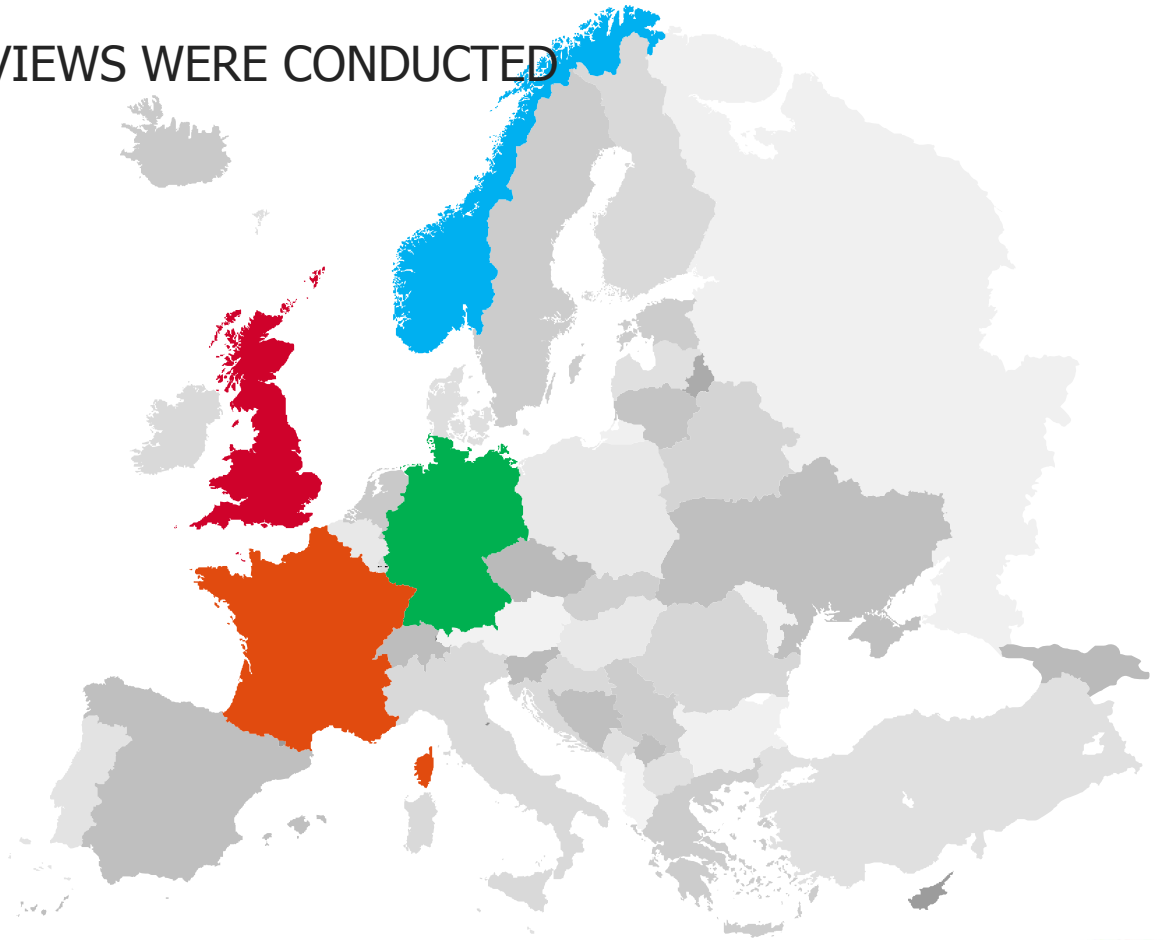
COUNTRIES WHERE INTERVIEWS WERE CONDUCTED

 **FRANCE**
1 000 interviews

 **UK**
1000 interviews

 **GERMANY**
1001 interviews

 **NORWAY**
1000 interviews



SUMMARY

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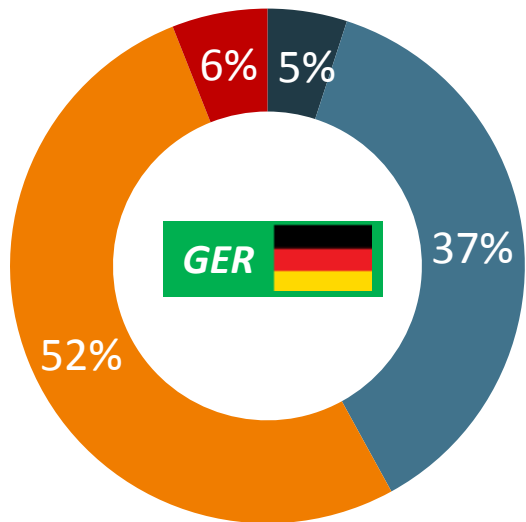
A photograph of two men sitting at a wooden table in a cafe. The man on the left is wearing a light blue button-down shirt and is smiling while looking at the man on the right. The man on the right is wearing a red and blue plaid shirt and is gesturing with his hands as if speaking. On the table are two black coffee cups, a small plate with a cookie, and a tablet. In the background, a blurred cafe counter and another person are visible.

PART 1

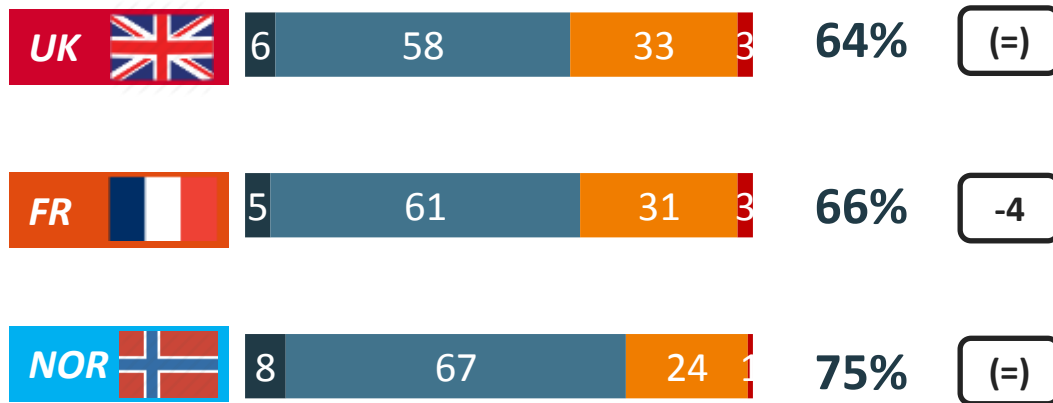
**THE CITIZENS' OPINION ON THE DEVELOPMENT OF DIGITAL
PUBLIC SERVICES**

THE CURRENT DEGREE OF DIGITAL DEVELOPMENT

Advanced 42% -9



Advanced



Very advanced

Quite advanced

Not very advanced

Not advanced at all

Question : How would you describe the current degree of digital development – i.e. use of the Internet and digital services – in the Government (national, local or devolved administrations) and its services ?



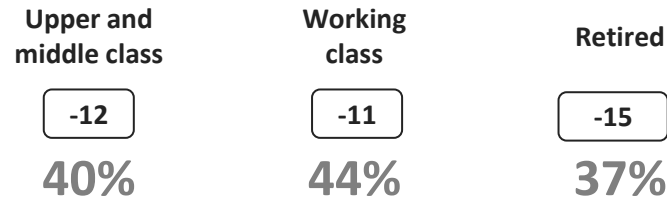
ZOOM GERMANY | SUBTOTAL ADVANCED 42% (-9)



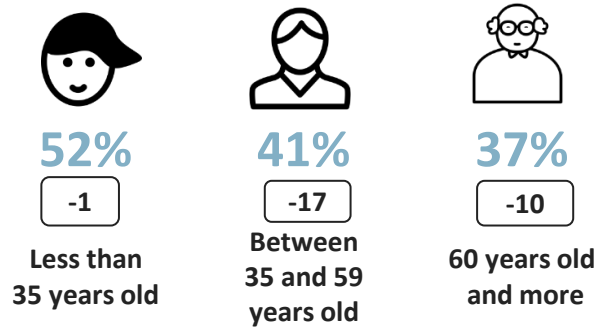
Gender



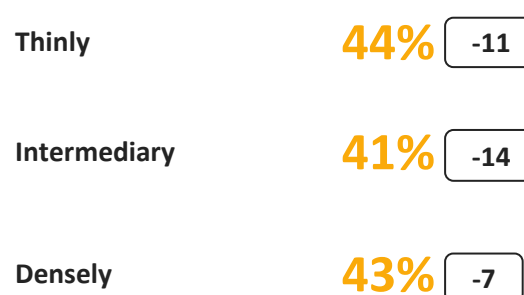
Socio professional category



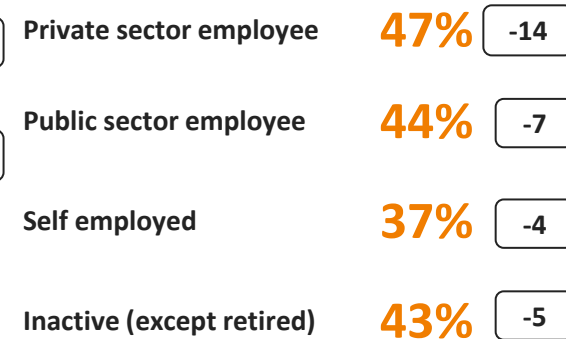
Age



Population density



Job status

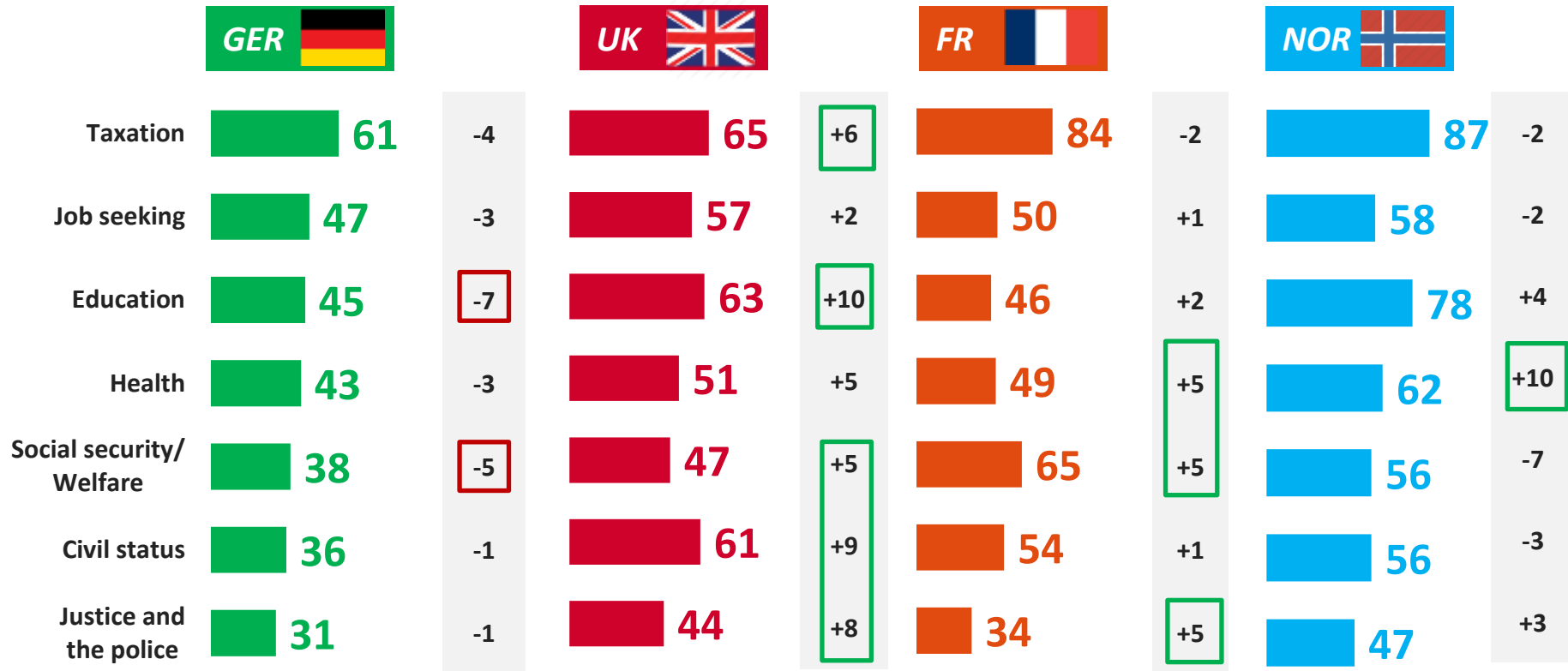


7 Question : How would you describe the current degree of digital development – i.e. use of the Internet and digital services – in the Government (national, local or devolved administrations) and its services ?



THE CURRENT DEGREE OF DIGITAL DEVELOPMENT IN DIFFERENT SECTORS

Subtotal very and quite advanced in %

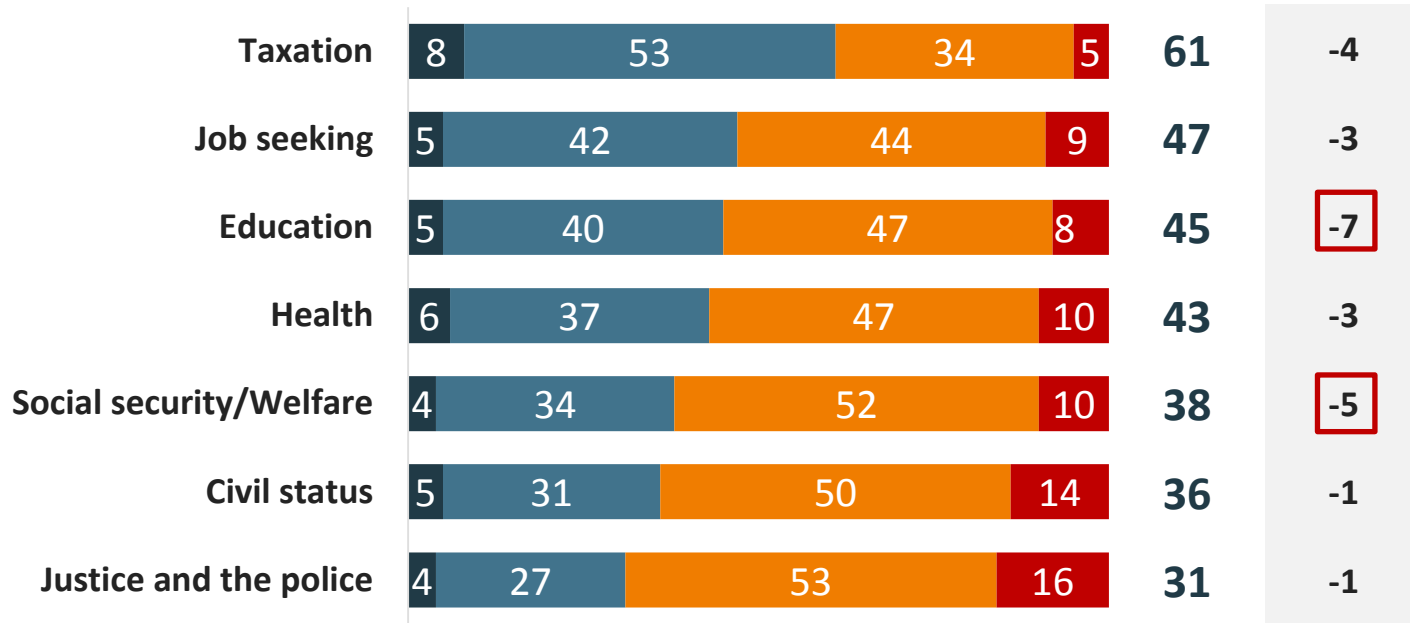


Question : How would you judge the development of digital services in each of the following areas of public sectors ?



ZOOM GERMANY | DETAIL

Subtotal very and quite advanced %



Very advanced

Quite advanced

Not very advanced

Not advanced at all

Question : How would you judge the development of digital services in each of the following areas of public sectors ?



NUMBER AND USER-FRIENDLINESS OF DIGITAL PUBLIC SERVICES

Subtotal Yes %



56%

public sector has increased the number of digital public services



83%

public sector has increased the number of digital public services



84%

public sector has increased the number of digital public services



85%

public sector has increased the number of digital public services



43%

the digital tools and services are increasingly easy to use



66%

the digital tools and services are increasingly easy to use



66%

the digital tools and services are increasingly easy to use



76%

the digital tools and services are increasingly easy to use



Question : Would you say that, in recent years... ?

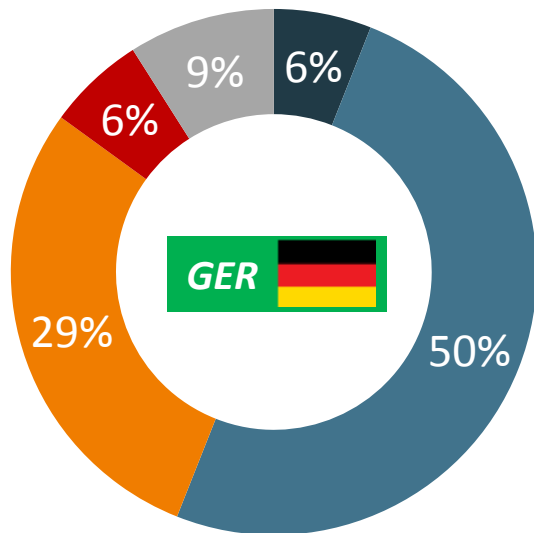


NUMBER OF DIGITAL SERVICES IN THE PUBLIC SECTOR



...the public sector has increased the number of digital public services

Yes 56%



Yes



Yes, absolutely

Yes, somewhat

No, not really

No, not at all

Do not know



Question : Would you say that, in recent years...the public sector has increased the number of digital public services ?



ZOOM GERMANY | SUBTOTAL YES

56%

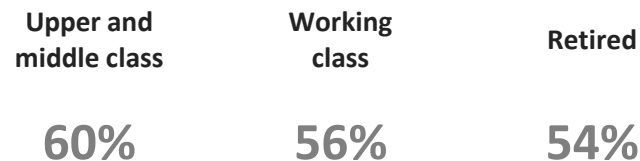
...public sector has increased the number of digital public services



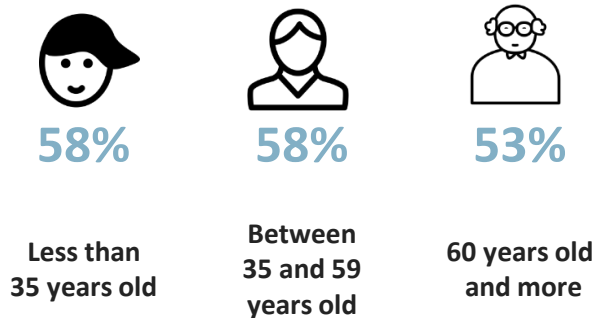
Gender



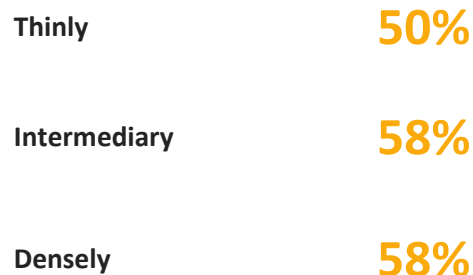
Socio professional category



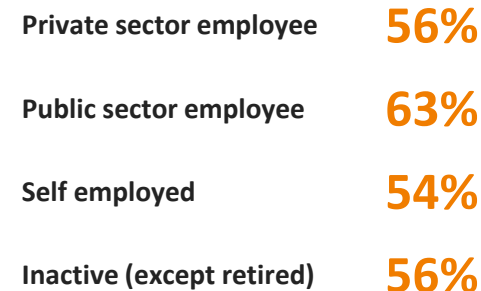
Age



Population density



Job status



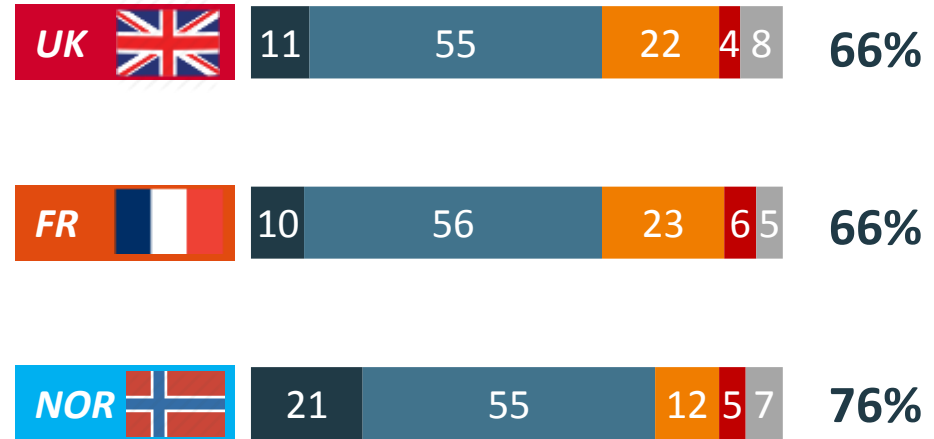
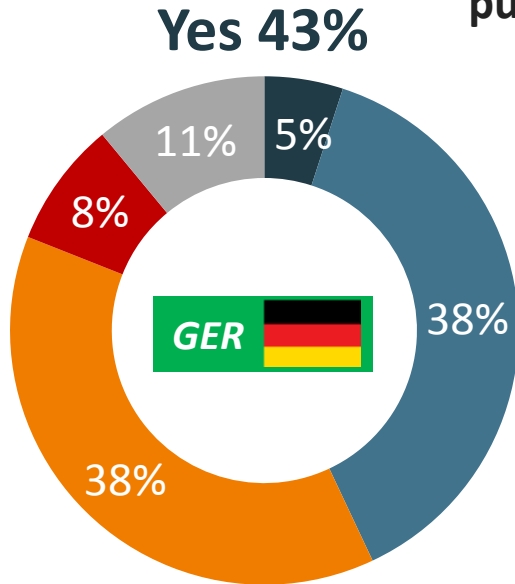
Question : Would you say that, in recent years...the public sector has increased the number of digital public services ?



USER-FRIENDLINESS OF DIGITAL SERVICES IN THE PUBLIC SECTOR



...the digital tools and services made available by the public sector are increasingly easy to use



Yes, absolutely

Yes, somewhat

No, not really

No, not at all

Do not know



Question : Would you say that, in recent years... the digital tools and services made available by the public sector are increasingly easy to use ?



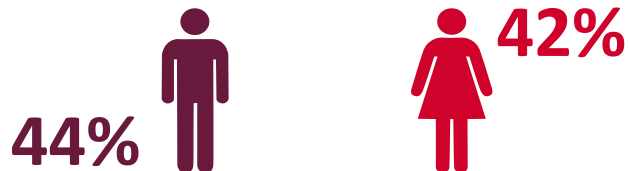
ZOOM GERMANY | SUBTOTAL YES

43%

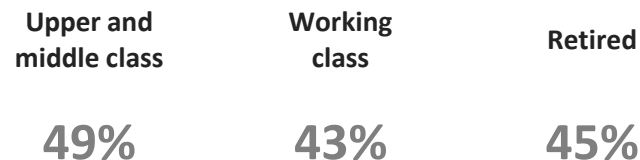
...the digital tools and services are increasingly easy to use



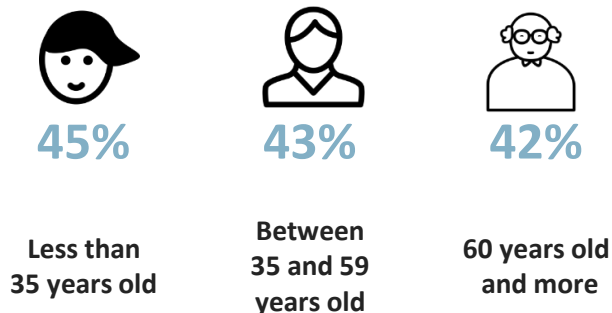
Gender



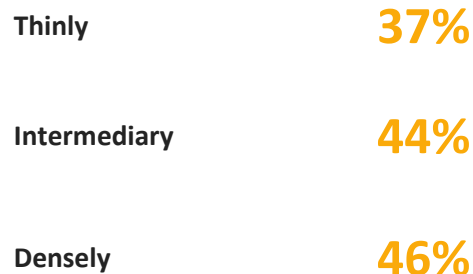
Socio professional category



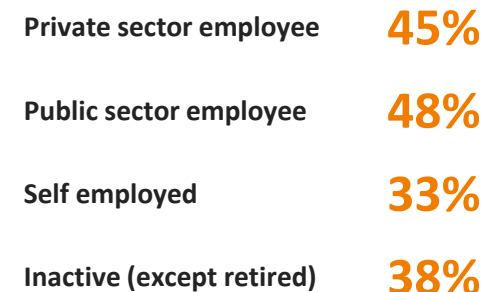
Age



Population density



Job status

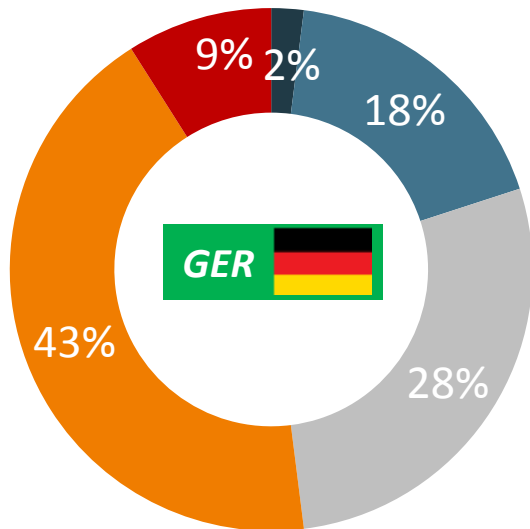


Question : Would you say that, in recent years... the digital tools and services made available by the public sector are increasingly easy to use ?

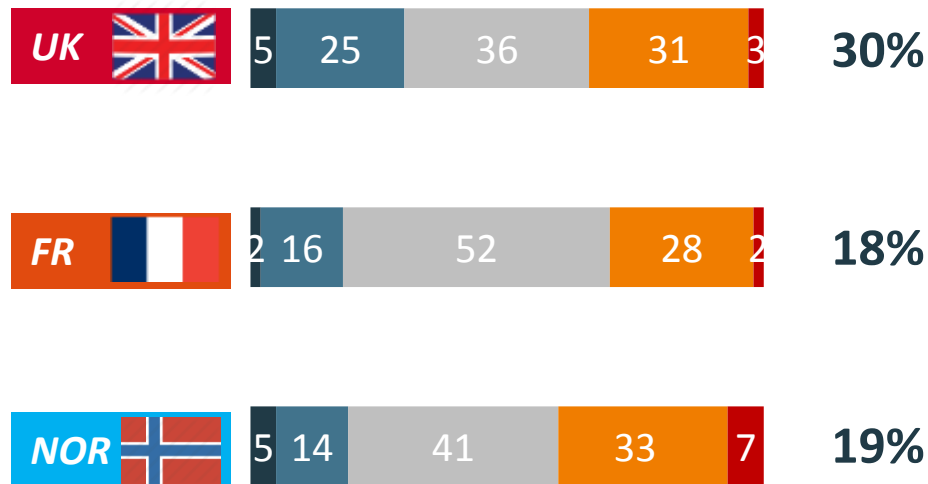


THE ADVANCEMENT OF DIGITALISATION IN THE PUBLIC SECTOR COMPARED TO PRIVATE COMPANIES

Advanced 20%



Advanced



Very advanced

Somewhat advanced

At the same level of advancement

Somewhat behind

Very behind



Question : In your opinion, compared to digital services offered by private companies, digital services offered by the public sector in [your country] are...

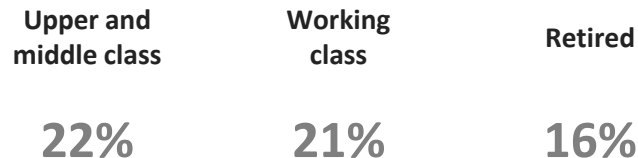


ZOOM GERMANY | ADVANCED 20%

Gender



Socio professional category



Age



26%

Less than 35 years old



21%

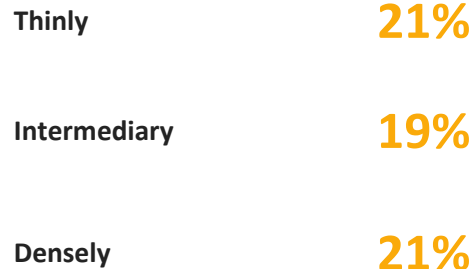
Between 35 and 59 years old



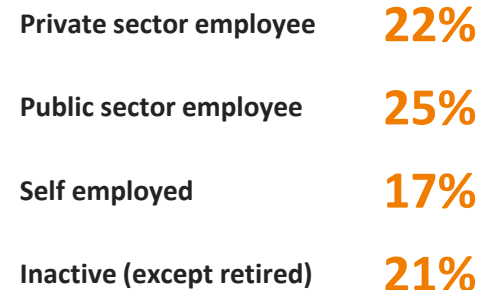
14%

60 years old and more

Population density



Job status



Question : In your opinion, compared to digital services offered by private companies, digital services offered by the public sector in [your country] are...



THE ADVANCEMENT OF DIGITALISATION IN EACH COUNTRY COMPARED TO OTHER COUNTRIES IN EUROPE

In %



More advanced [in your country] than in other European countries



Less advanced [in your country] than in other European countries



Neither more nor less advanced [in your country] than in other European countries



Do not know



Question : And would you say that the development of digital public services is...

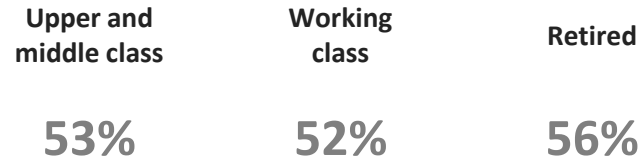


ZOOM GERMANY | LESS ADVANCED IN GERMANY THAN IN OTHER EUROPEAN COUNTRIES **51%**

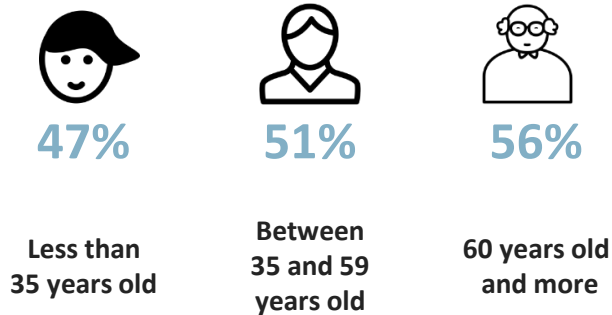
Gender



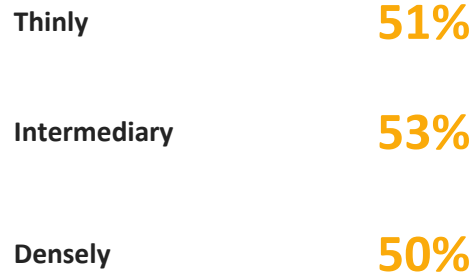
Socio professional category



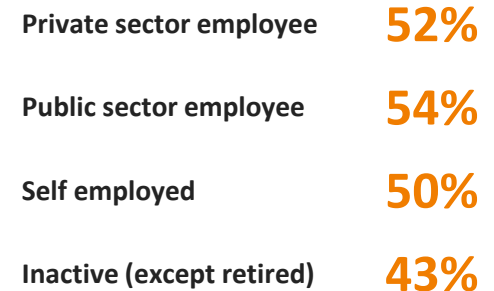
Age



Population density



Job status



Question : And would you say that the development of digital public services is...



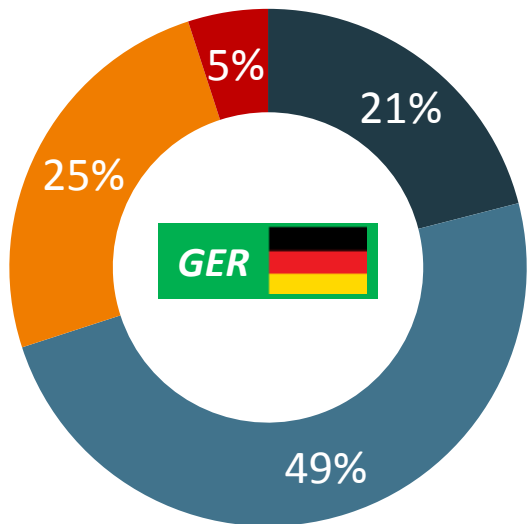
A woman with long brown hair is shown in profile, looking at a smartphone. The background is a blurred public space, possibly a train or bus station, with people and lights visible. A red banner is at the top left, and a white banner with text is across the middle.

PART 2

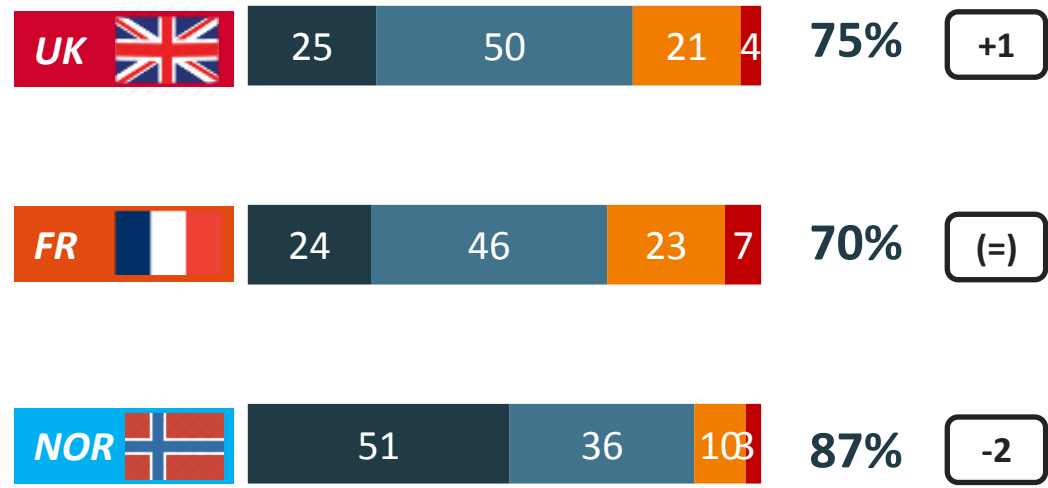
CITIZEN'S EXPECTATIONS FOR THE PUBLIC SECTOR DIGITAL TRANSFORMATION

PRIORITY OF THE DIGITAL DEVELOPMENT IN THE RELATIONS BETWEEN THE STATE AND THE POPULATION

Priority 70% +2



Priority



An absolute priority **Somewhat a priority** **Not really a priority** **Not a priority at all**

Question : In your opinion, is it a priority that the State should increasingly use Internet and digital services in its relations with the population?

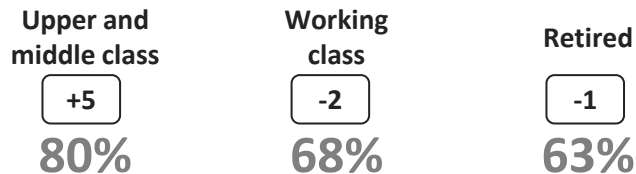


ZOOM GERMANY | PRIORITY 70% (+2)

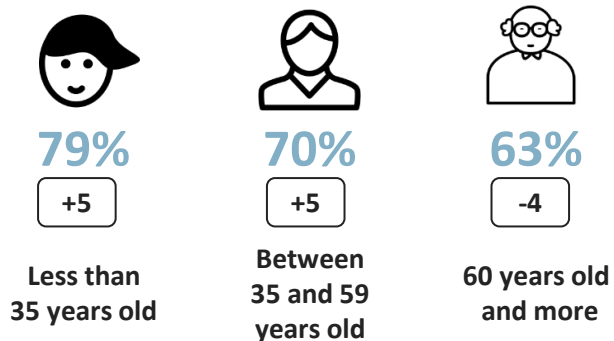
Gender



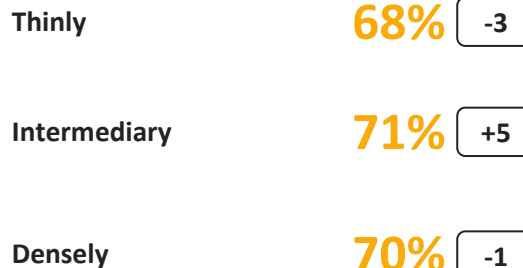
Socio professional category



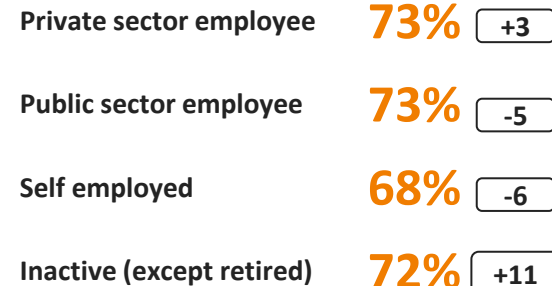
Age



Population density



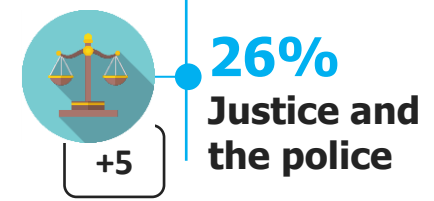
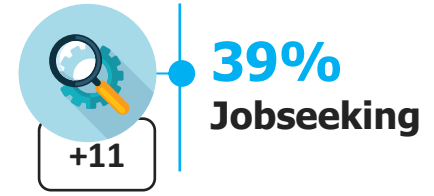
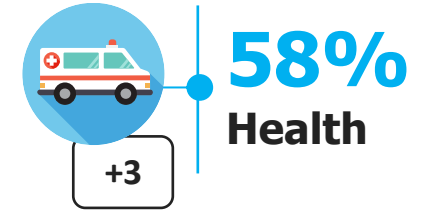
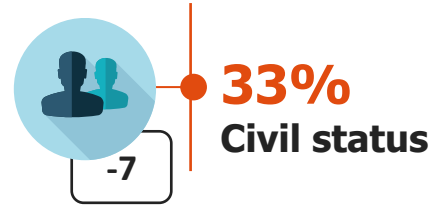
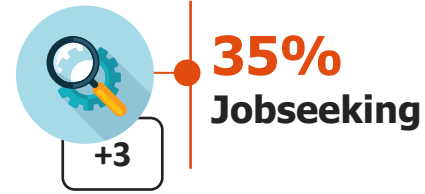
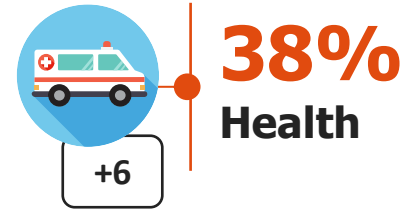
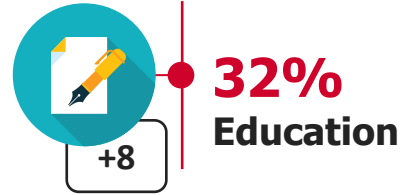
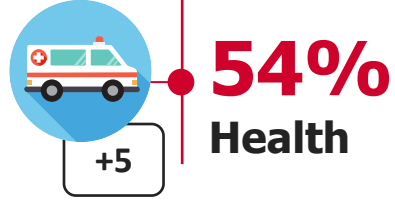
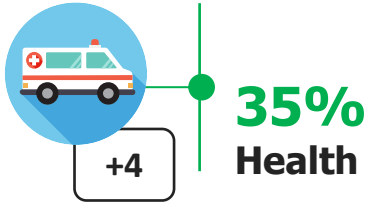
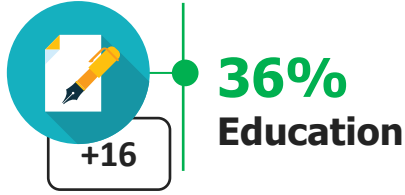
Job status



Question : In your opinion, is it a priority that the State should increasingly use Internet and digital services in its relations with the population?



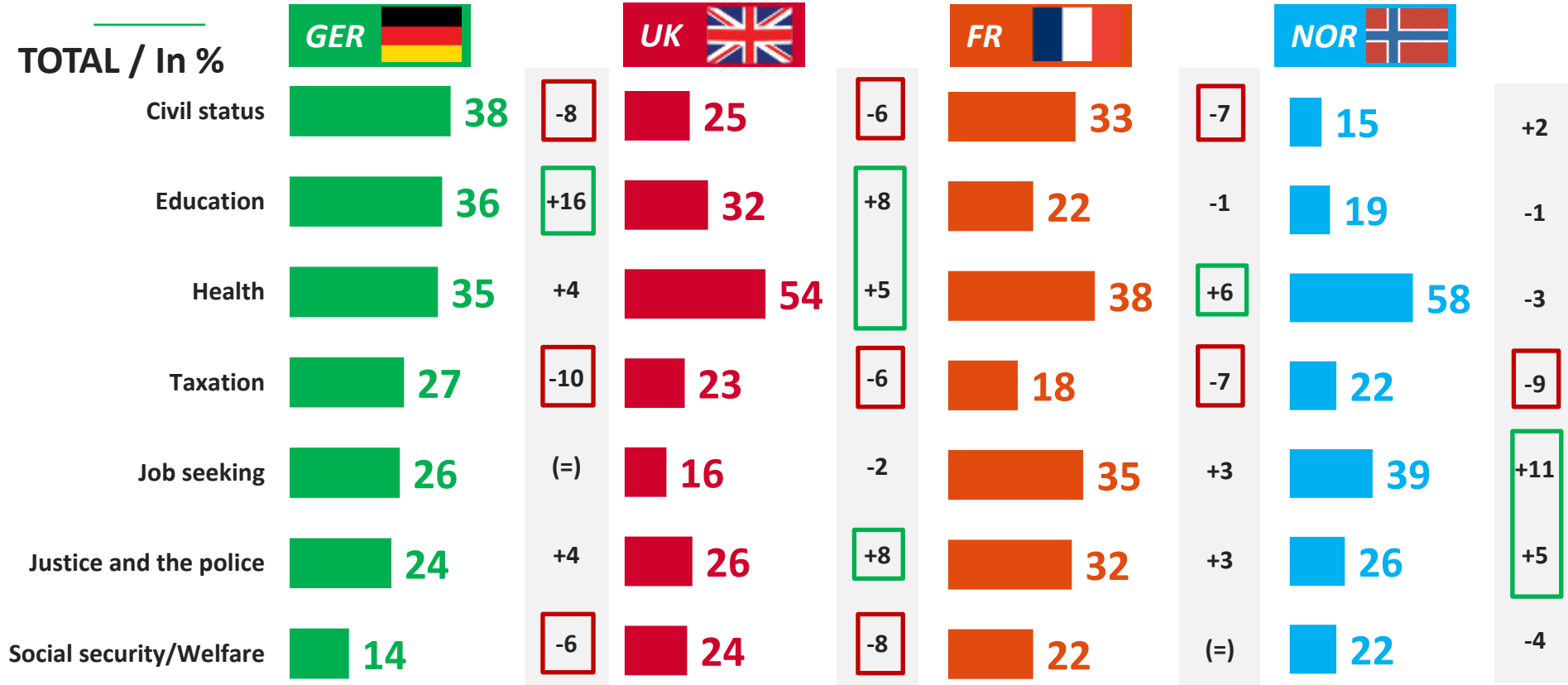
TOP 3 : PUBLIC SECTORS WHICH SHOULD BE DIGITALISE IN PRIORITY



Question : And in your opinion, which areas of public sectors should make the digital development – i.e. use of the Internet and digital services – a priority ?



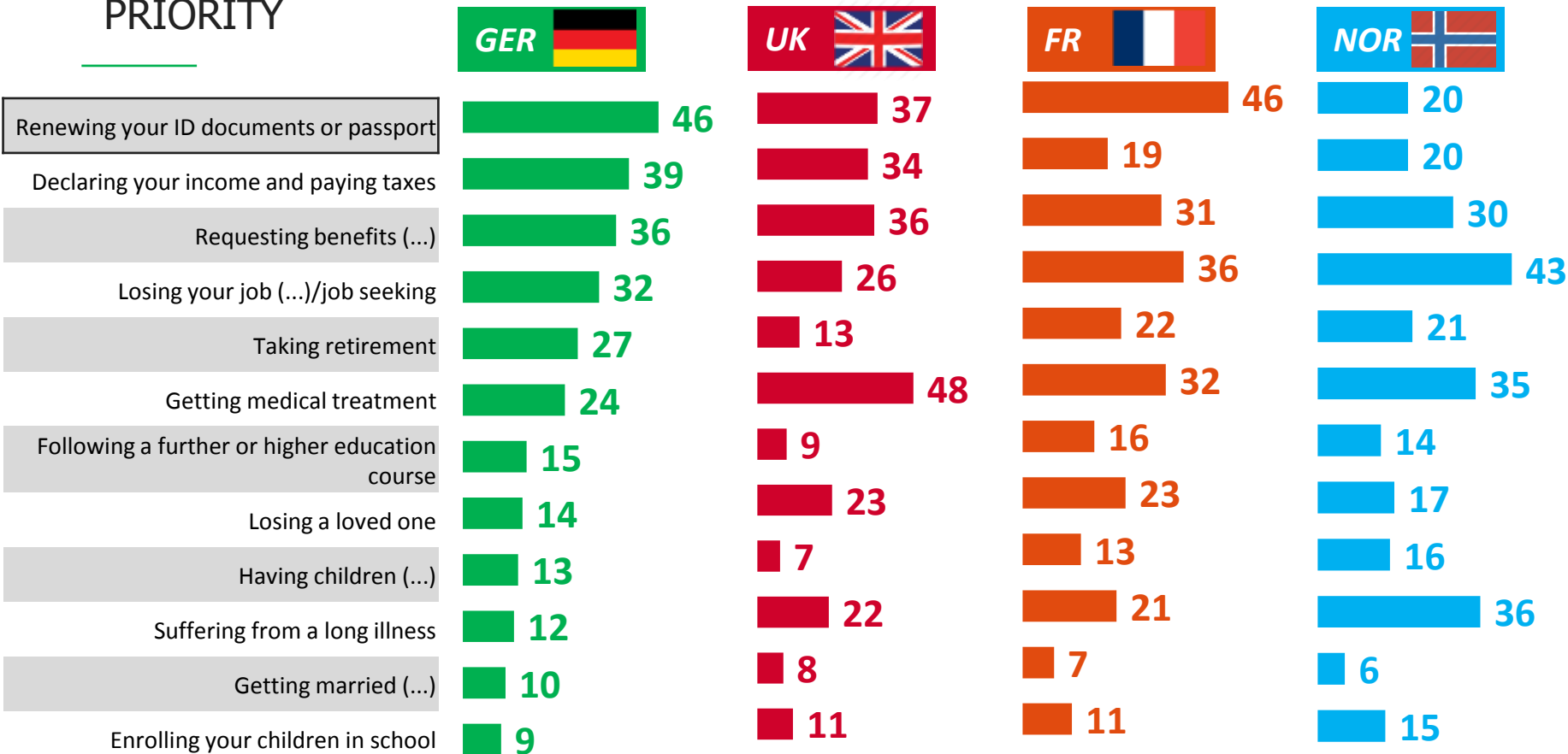
PUBLIC SECTORS WHICH SHOULD BE DIGITALISE IN PRIORITY



Question : And in your opinion, which areas of public sectors should make the digital development – i.e. use of the Internet and digital services – a priority ?



LIFE EVENTS ONLINE PROCEDURES WHICH SHOULD BE SIMPLIFIED IN PRIORITY



Question : And which online procedures linked to these life events do you think need to be simplified as a priority ?



ZOOM GERMANY



Occasional events

Losing a loved one

Requesting benefits

NEED OF SIMPLIFICATION | 14%

NEED OF SIMPLIFICATION | 36%

Following a further or higher education course

Jobseeking

Declaring your income and paying taxes

NEED OF SIMPLIFICATION | 15%

NEED OF SIMPLIFICATION | 32%

NEED OF SIMPLIFICATION | 39%

Getting married

NEED OF SIMPLIFICATION | 10%

Taking retirement

NEED OF SIMPLIFICATION | 27%

Enrolling your children in school

NEED OF SIMPLIFICATION | 9%

Having children

NEED OF SIMPLIFICATION | 13%

Getting medical treatment

NEED OF SIMPLIFICATION | 24%

Suffering from a long illness

NEED OF SIMPLIFICATION | 12%

Renewing one's ID document or passport

NEED OF SIMPLIFICATION | 46%



OPINION ON DIGITAL TRANSFORMATION OPTIONS FOR THE PUBLIC SECTOR

A priority / In %



Creation of a one-stop digital portal for undertaking interactions, such as life events, which need to be performed with multiple agencies (...*)



Use new technologies to streamline services



Access to an online citizen account that summarizes my personal details, updates me on my previous/current interactions, and informs me about my entitlements



The possibility of carrying out 100% of administrative interactions through digital services on different devices (...)



Involve citizens in policy making using collaborative and social media tools



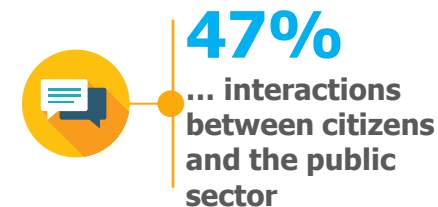
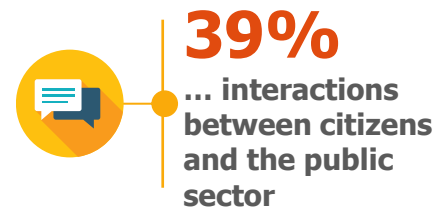
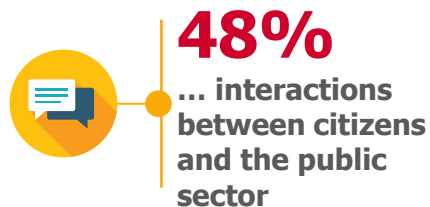
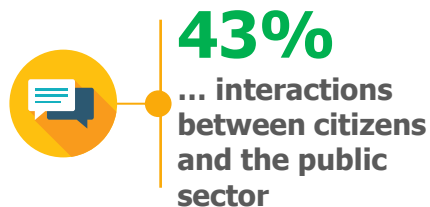
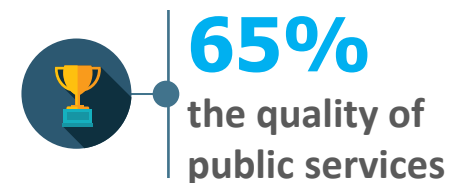
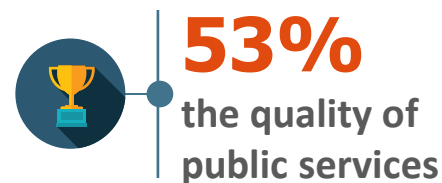
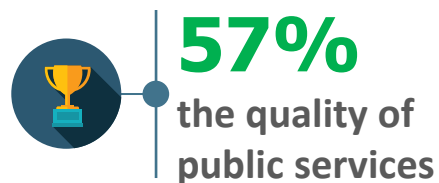
Question : Please rate each of the following digital transformation options for [your country's] public sector?

*(thus eliminating the need to enter in personal data for every new interaction)



THE IMPACT OF DIGITALISATION ON PUBLIC SERVICES

A positive impact %

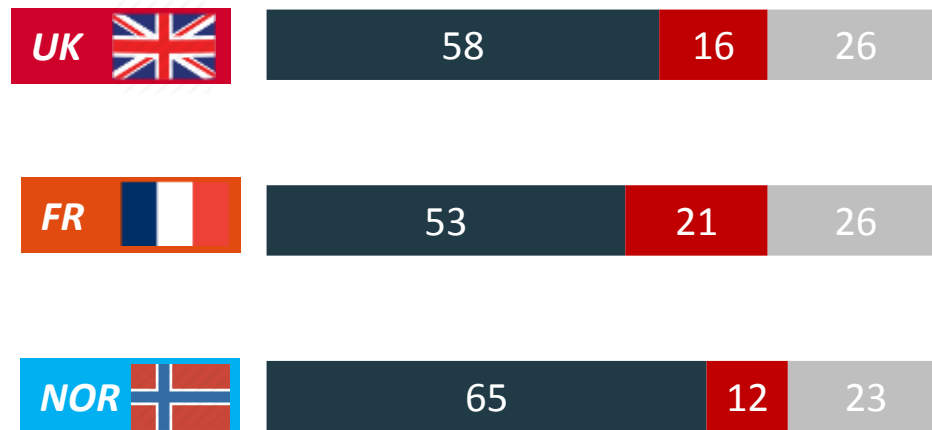
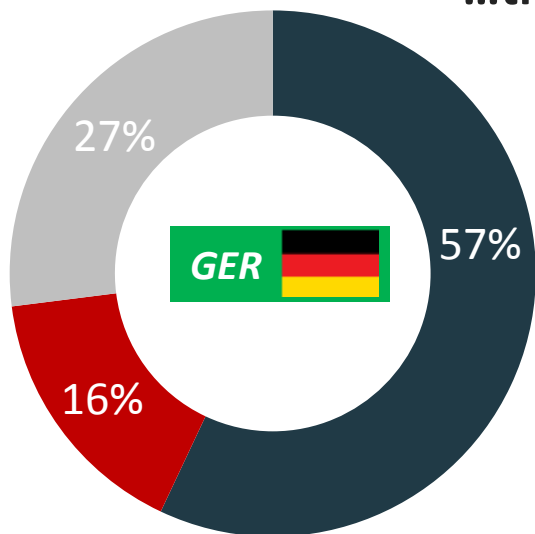


Question : In your opinion, will the development of digital public services have a positive, a negative, or no impact on ... [the quality of public services/... interactions between citizens and the public sector] ?

THE IMPACT OF DIGITALISATION ON THE QUALITY OF PUBLIC SERVICES



...the quality of public services



A positive impact

A negative impact

No impact



Question : In your opinion, will the development of digital public services have a positive, a negative, or no impact on **the quality of public services** ?

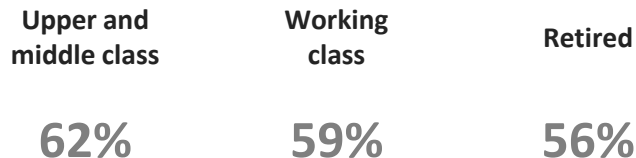


ZOOM GERMANY | THE DEVELOPMENT OF DIGITAL PUBLIC SERVICES WILL HAVE A POSITIVE IMPACT ON THE QUALITY OF PUBLIC SERVICES **57%**

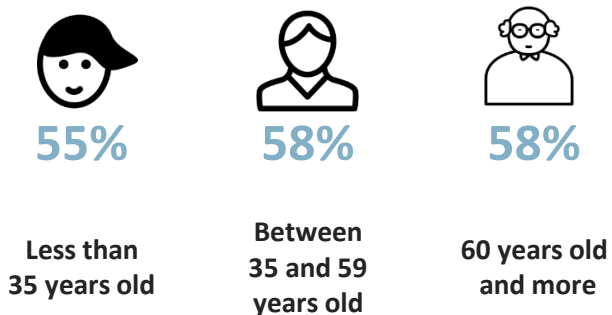
Gender



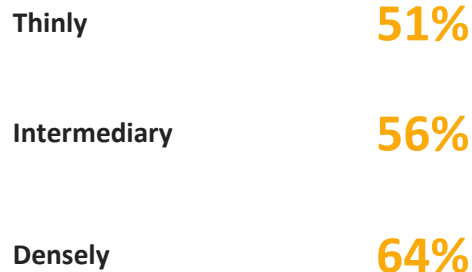
Socio professional category



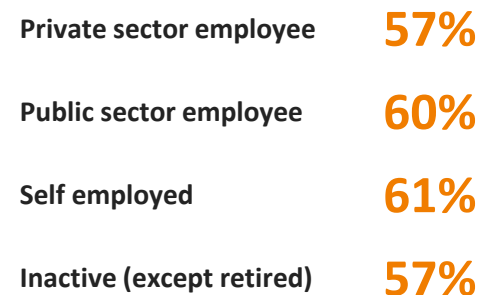
Age



Population density



Job status



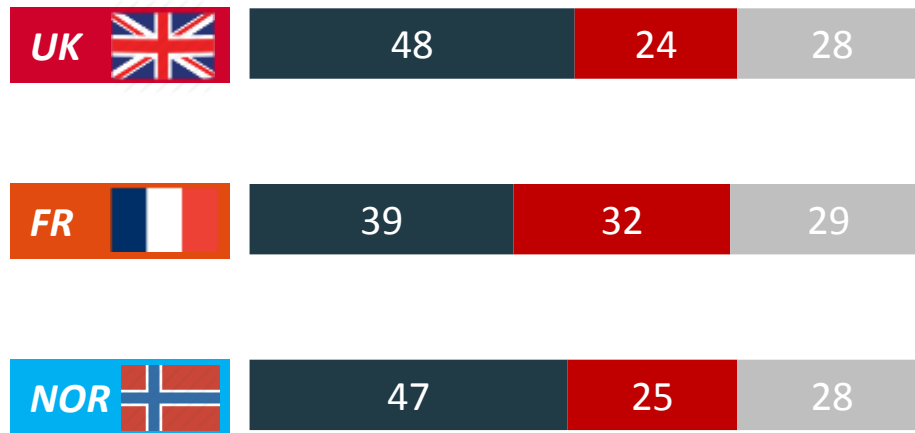
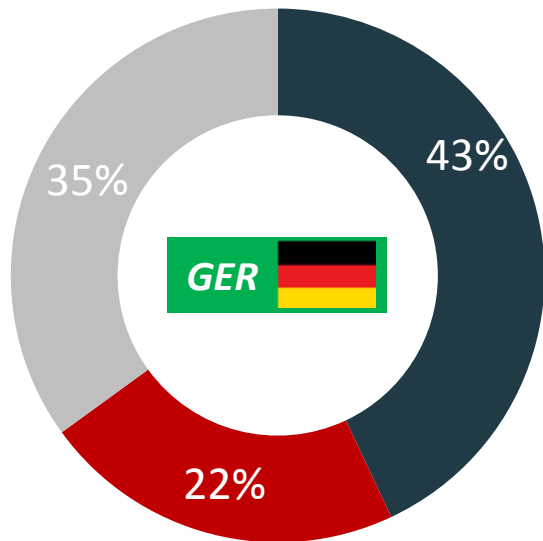
Question : In your opinion, will the development of digital public services have a positive, a negative, or no impact on the quality of public services ?



THE IMPACT OF DIGITALISATION ON INTERACTIONS BETWEEN CITIZENS AND THE PUBLIC SECTOR



...interactions between citizens and the public sector



A positive impact

A negative impact

No impact



Question : In your opinion, will the development of digital public services have a positive, a negative, or no impact on **interactions between citizens and the public sector** ?

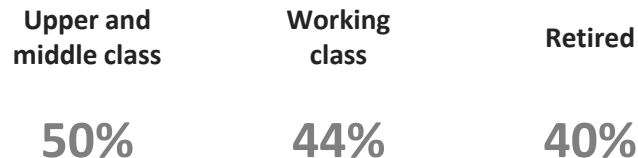


ZOOM GERMANY | THE DEVELOPMENT OF DIGITAL PUBLIC SERVICES WILL HAVE A POSITIVE IMPACT ON INTERACTIONS BETWEEN CITIZENS AND THE PUBLIC SECTOR **43%**

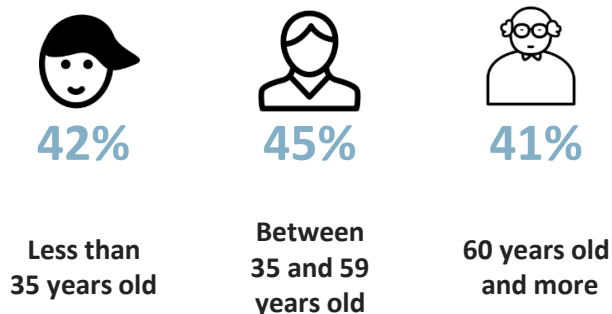
Gender



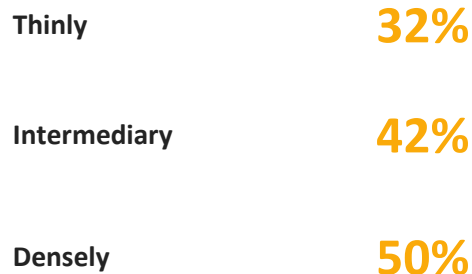
Socio professional category



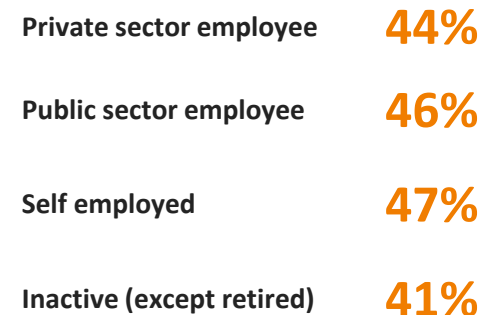
Age



Population density



Job status



Question : In your opinion, will the development of digital public services have a positive, a negative, or no impact on interactions between citizens and the public sector ?



THE POSITIVE IMPACTS OF THE DEVELOPMENT OF DIGITAL PUBLIC SERVICES

Subtotal Yes / In %



Prepare [your country] for the future



Facilitate the analysis and systematic cross-referencing of personal information, in order to increase fraud control



Make citizens' lives easier and simplify them



Save money



Question : Do you think that the development of digital public services will...

*(people who are not comfortable with digital technology or language issues, people without access to digital technology, etc.)



THE NEGATIVE IMPACTS OF THE DEVELOPMENT OF DIGITAL PUBLIC SERVICES

Subtotal Yes / In %



Make it hard for certain civil servants to adapt to this change



Make access to public services more difficult or even impossible for certain people (...*)



Reduce the number of public jobs

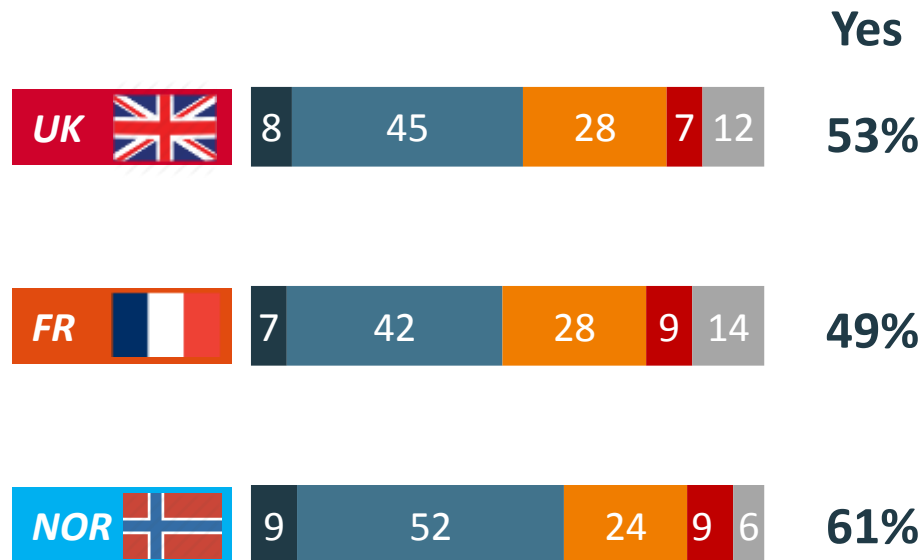
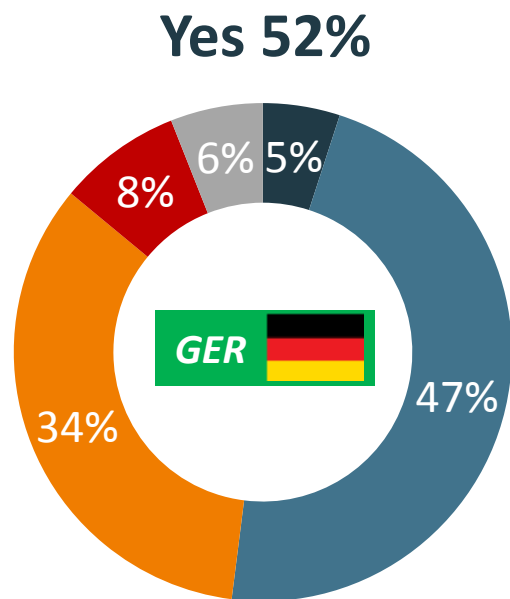


NEW Question : Do you think that the development of digital public services will...

*(people who are not comfortable with digital technology or language issues, people without access to digital technology, etc.)



THE ABILITY OF PUBLIC AGENTS TO SUPPORT THE DIGITALISATION OF SERVICES



Absolutely

Somewhat

Not really

Not at all

I don't know



Question : Do you believe people who work in the public sector have the necessary skills, abilities or training needed to support the future development of digital public services?

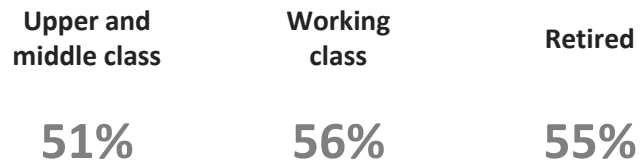


ZOOM GERMANY | YES 52%

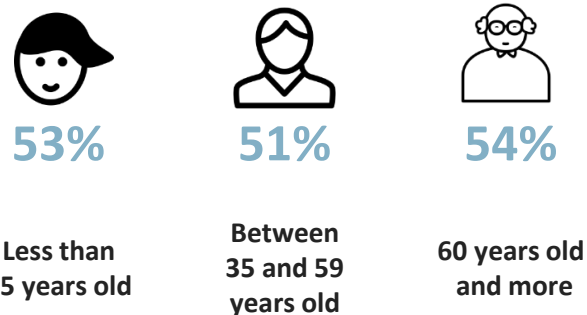
Gender



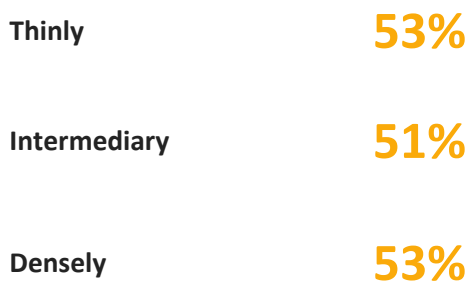
Socio professional category



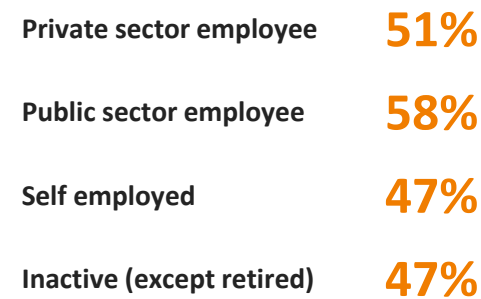
Age



Population density



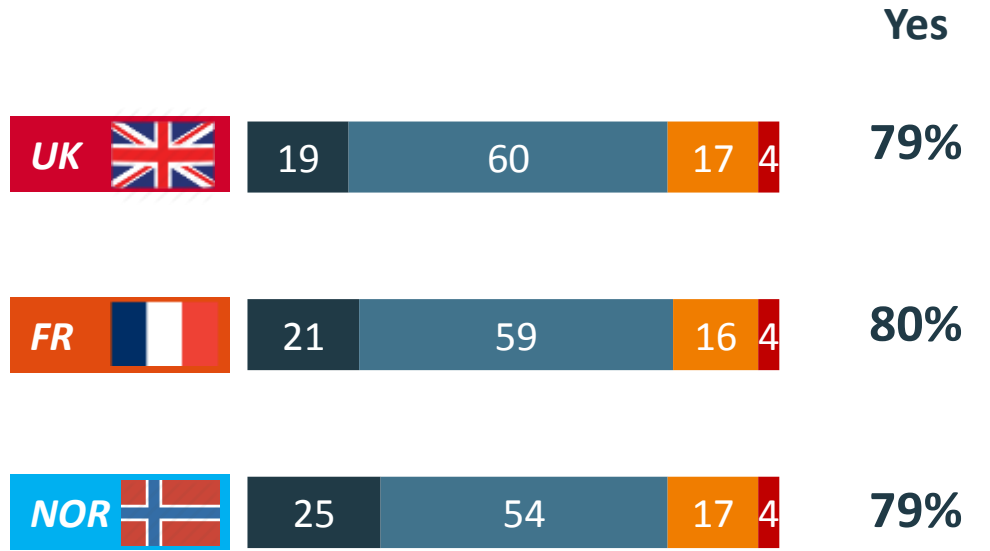
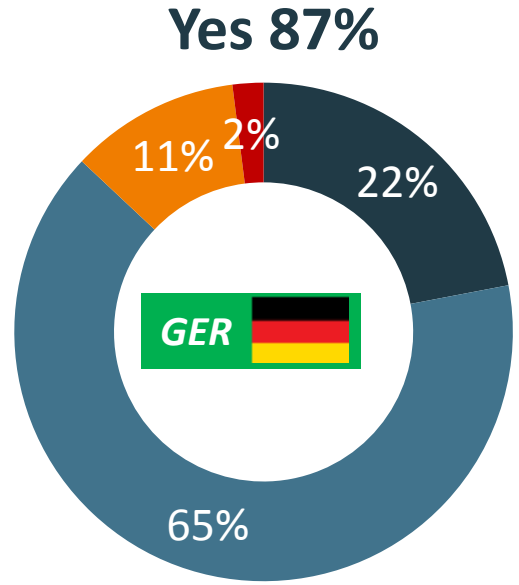
Job status



NEW Question : Do you believe people who work in the public sector have the necessary skills, abilities or training needed to support the future development of digital public services?



EVALUATING ONLINE PUBLIC SERVICES TO IMPROVE THEIR QUALITY



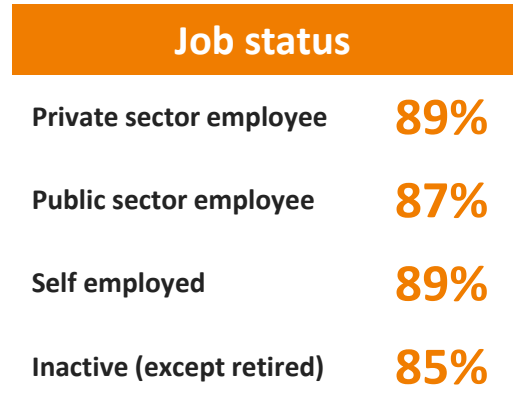
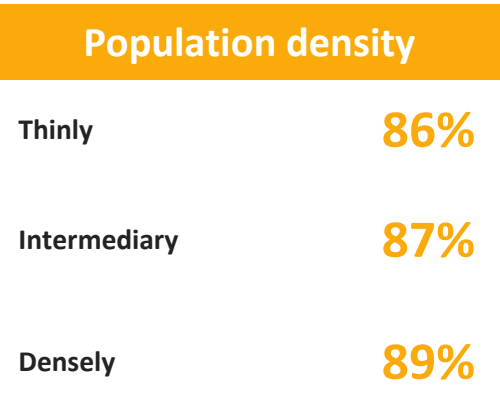
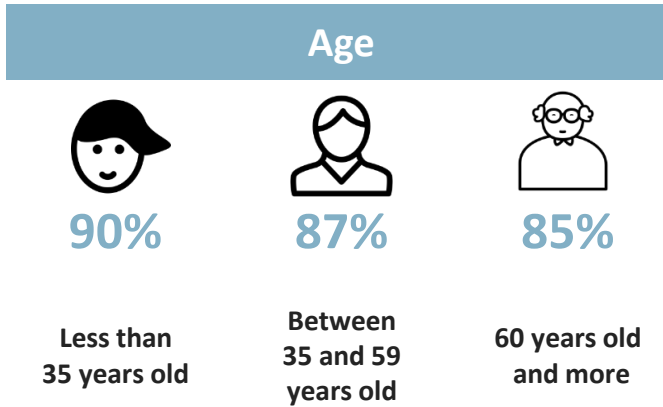
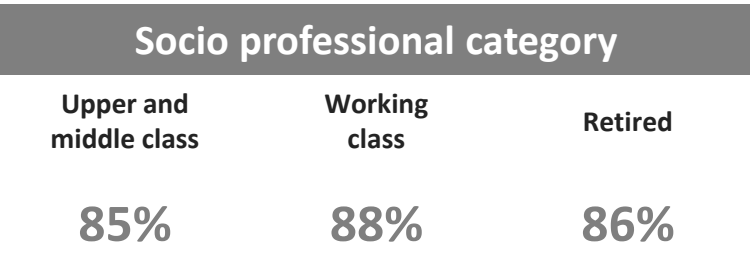
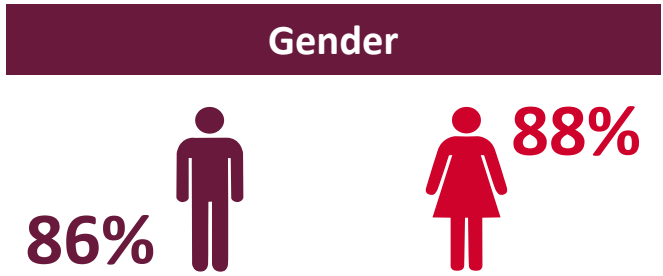
Yes, absolutely **Yes, somewhat** **No, not really** **No, not at all**



Question : In your opinion, would grading and evaluating online digital public services make it possible to improve the quality of these services ?



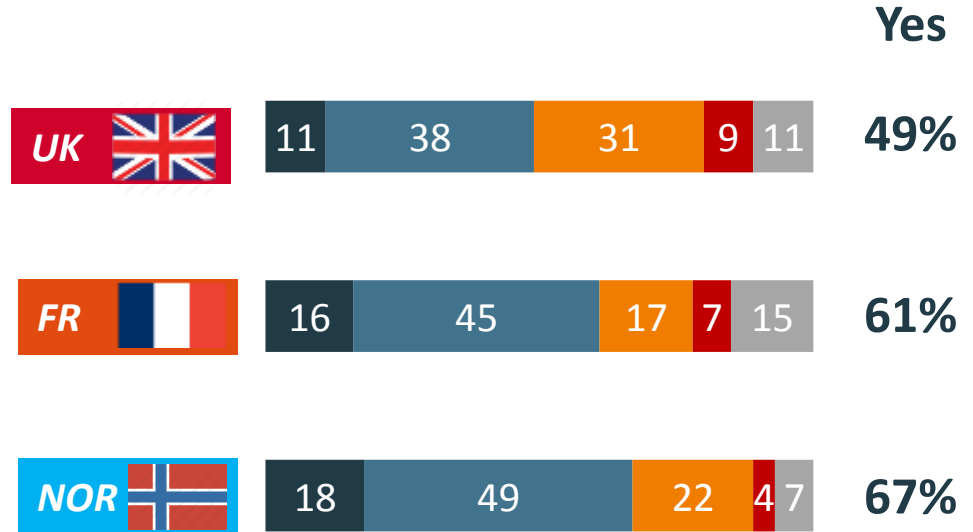
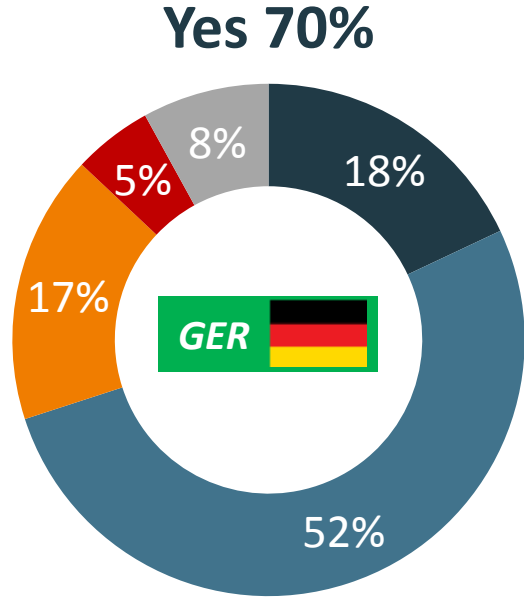
ZOOM GERMANY | YES 87%



Question : In your opinion, would grading and evaluating online digital public services make it possible to improve the quality of these services ?



PARTICIPATING IN ONLINE DIALOGUES AS A WAY TO IMPROVE DEMOCRACY



Yes, absolutely

Yes, somewhat

No, not really

No, not at all

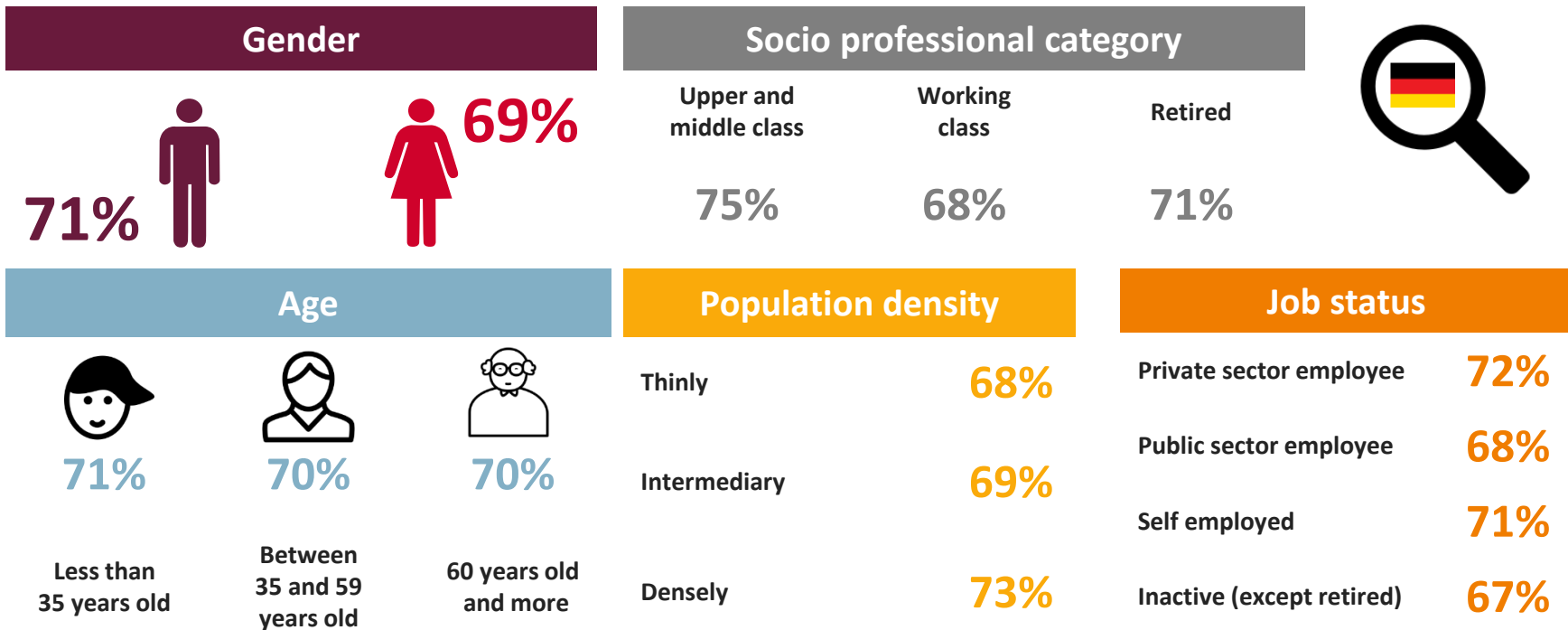
Do not know



Question : Do you believe participating in online dialogues will help improve the way democracy works in [your country]?



ZOOM GERMANY | YES 70%



Question : Do you believe participating in online dialogues will help improve the way democracy works in [your country]?

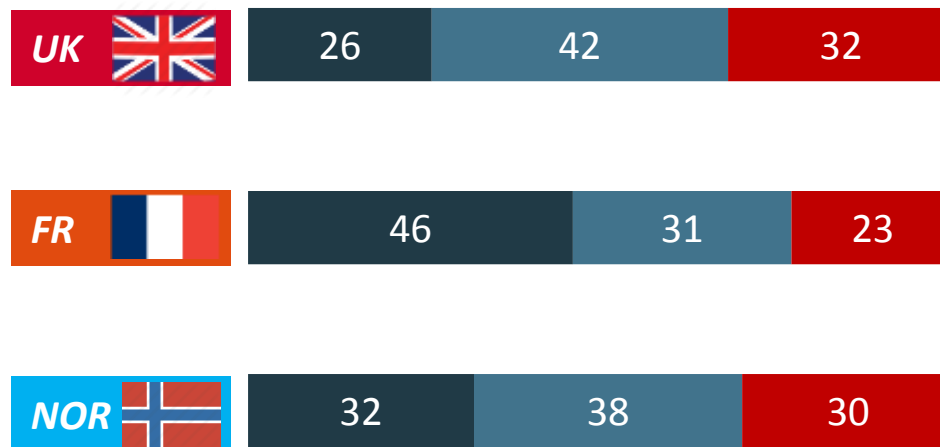
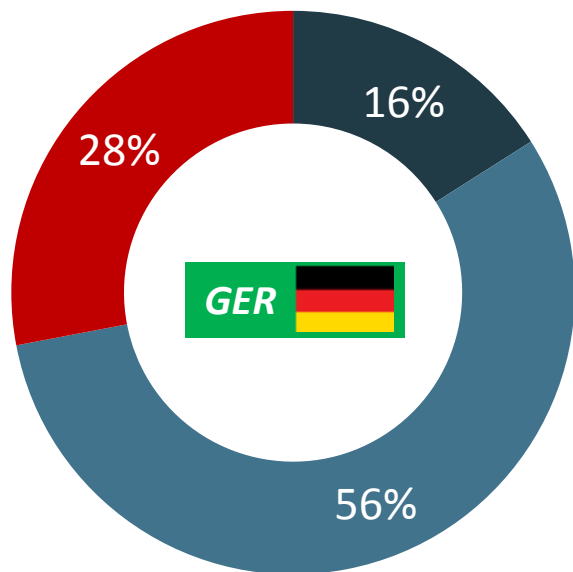


A photograph of a man with grey hair, wearing a light blue button-down shirt, smiling warmly while talking to a woman with brown hair in a ponytail, wearing a pink top. They are in an office environment with shelves and a desk. On the desk, there is a laptop, a smartphone, and a tablet. The man is wearing a watch on his left wrist.

PART 3

**OPINION ON THE GOVERNMENTS' INVOLVEMENT IN
IMPLEMENTING NEW DIGITAL SERVICES**

THE GOVERNMENTS' WILL AND ABILITY TO DEVELOP ONLINE PUBLIC SERVICES



... has the will to make progress and will manage to do so

... has the will to make progress but won't really manage to do so

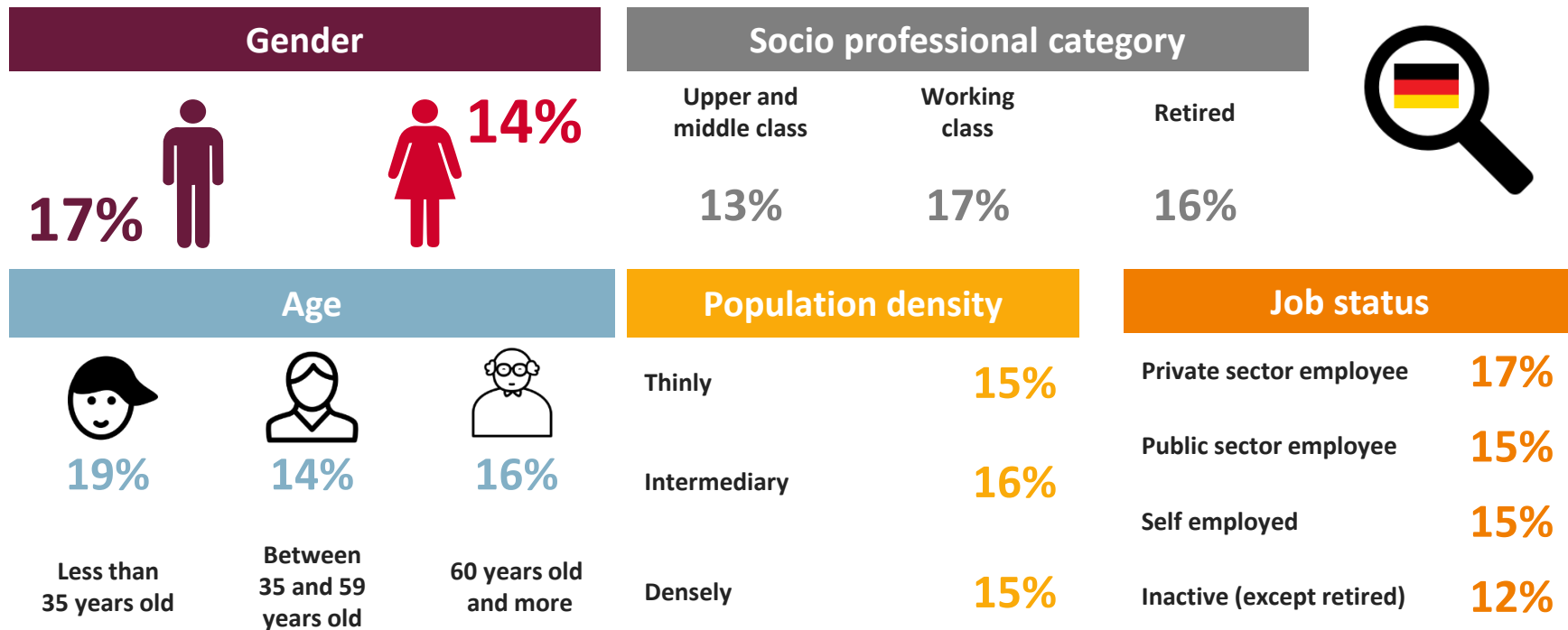
... makes quite a lot of statements but does not really have the will to make progress



Question : And concerning the development of digital public services, do you feel that the Government...



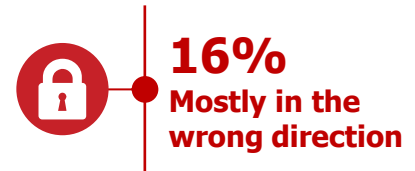
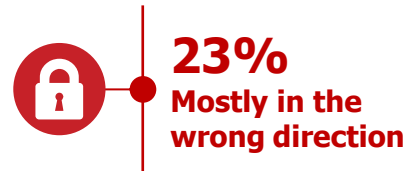
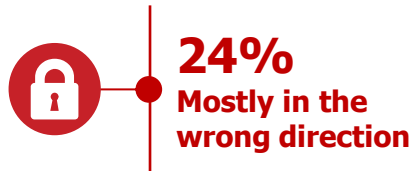
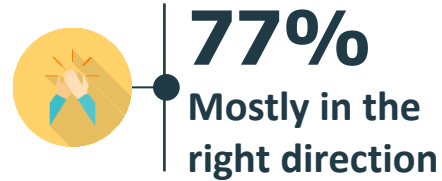
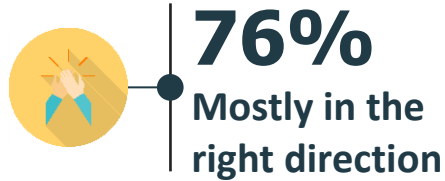
ZOOM GERMANY | HAS THE WILL TO MAKE PROGRESS AND WILL MANAGE TO DO SO **16%**



Question : And concerning the development of digital public services, do you feel that the Government...



OPINION ON THE GOVERNMENTS' POLICIES FOR DIGITAL TRANSFORMATION



Question : All in all, would you say that the Government's policies around the digital transformation are going...



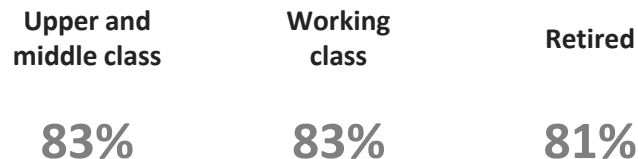
ZOOM GERMANY | MOSTLY IN THE RIGHT DIRECTION 81%



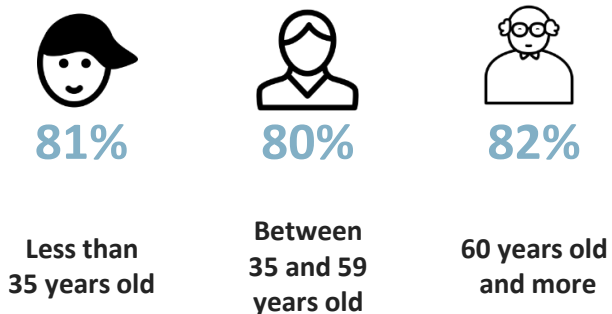
Gender



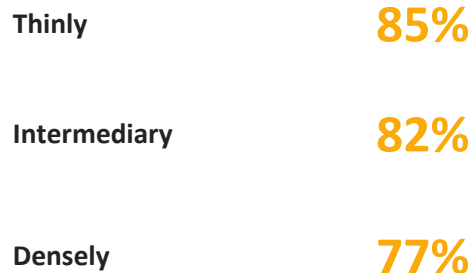
Socio professional category



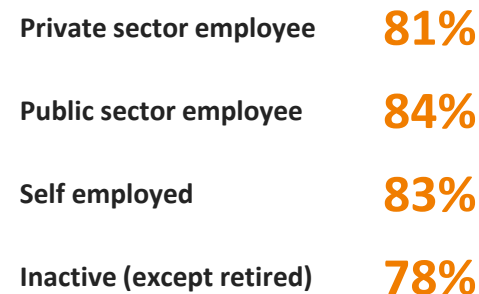
Age



Population density



Job status



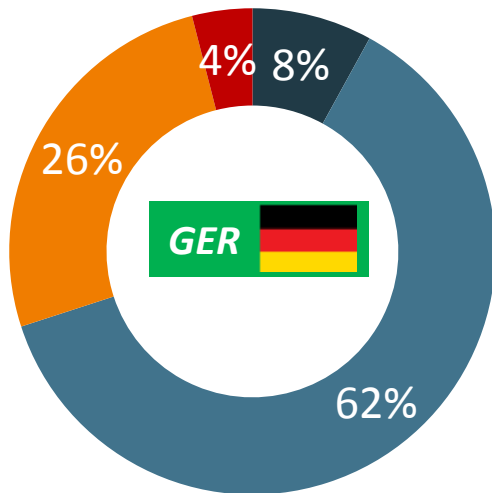
All in all, would you say that the Government's policies around the digital transformation are going...



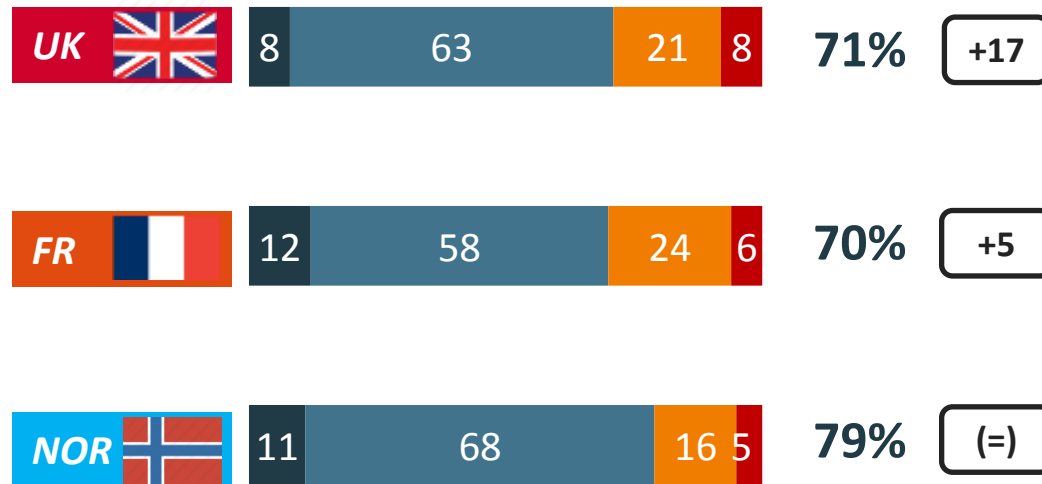
OPINION ON THE PUBLIC AUTHORITIES ABILITY TO ENSURE THE SECURITY OF DIGITAL DATA

Trust 70%

+13



Trust



Absolutely

Somewhat

Not really

Not at all

Question : How much do you trust the public authorities to ensure the security of the digital data in their possession and particularly your own confidential information ?



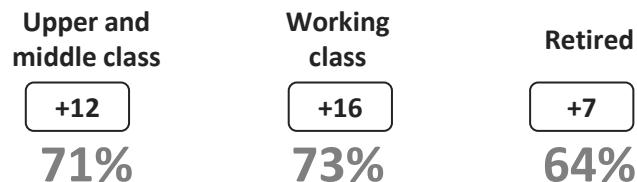
ZOOM GERMANY | TRUST 70% (+13)



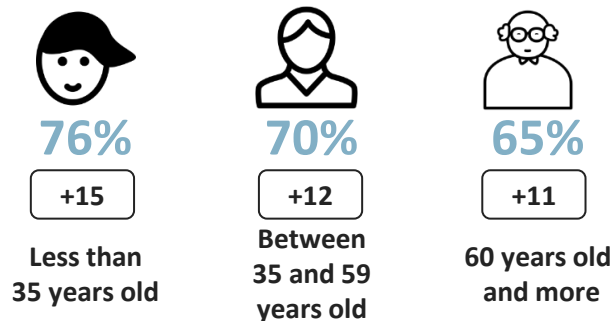
Gender



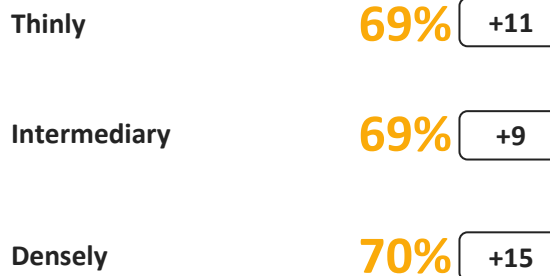
Socio professional category



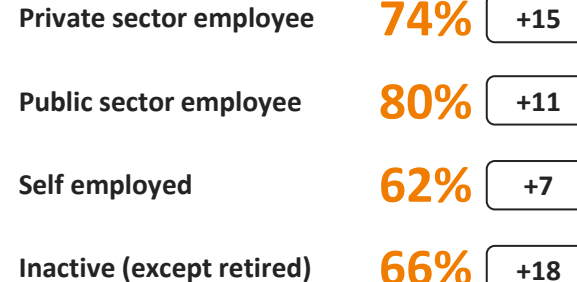
Age



Population density



Job status

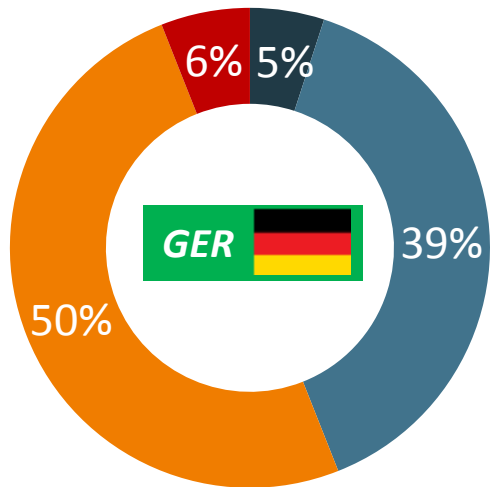


Question : How much do you trust the public authorities to ensure the security of the digital data in their possession and particularly your own confidential information ?

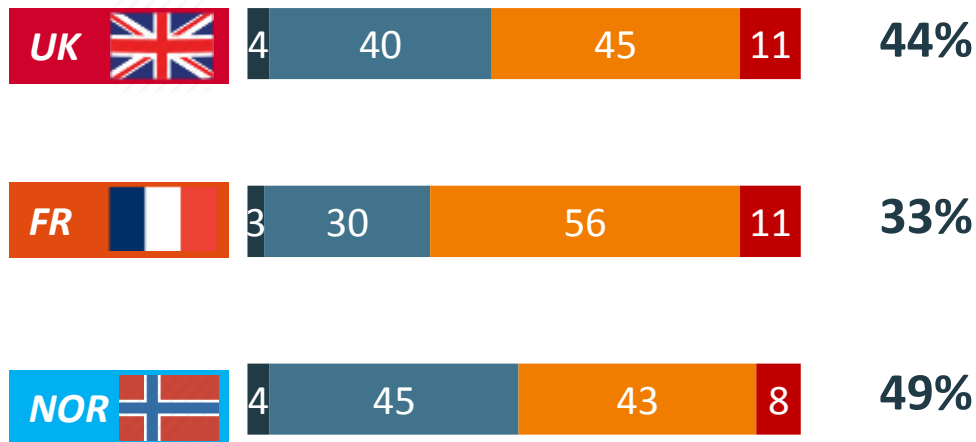


LEVEL OF INFORMATION ABOUT THE GOVERNMENTS' POLICIES ON DIGITALISATION

Well informed 44%



Well informed



Very well informed

Reasonably well informed

Poorly informed

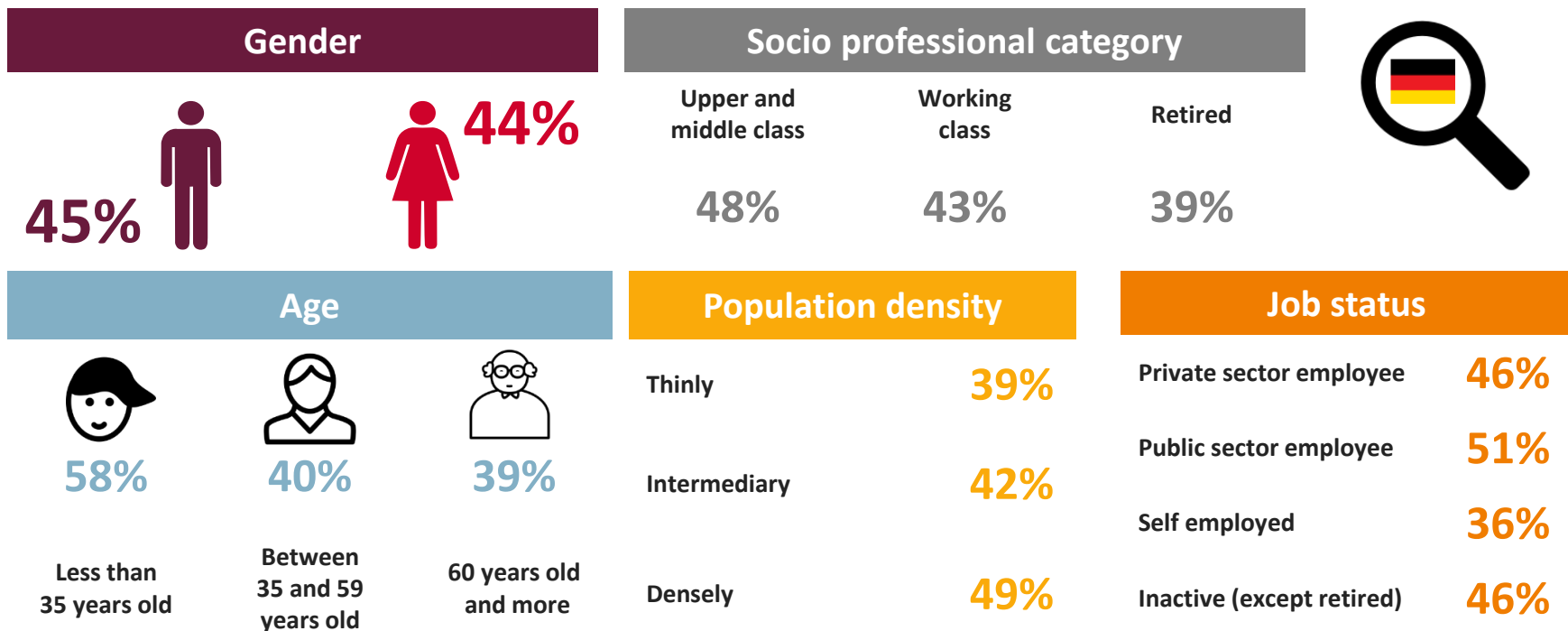
Very poorly informed



Question : How well would you say that you are informed about the Government's policies on the digital transformation of public services?



ZOOM GERMANY | WELL INFORMED 44%



NEW Question : How well would you say that you are informed about the Government's policies on the digital transformation of public services?

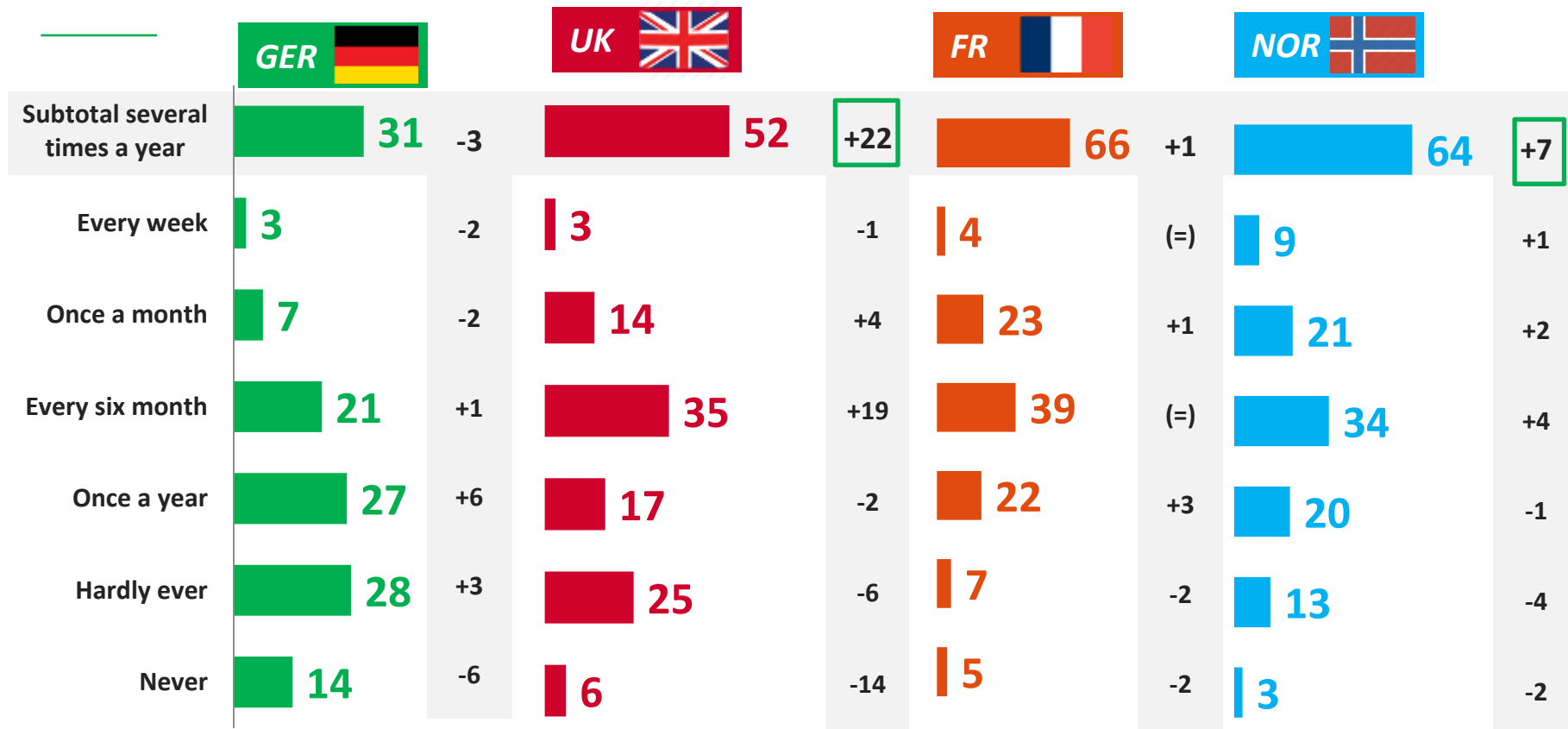


A group of diverse young children are sitting on a carpeted floor in a classroom. They are gathered around a tablet computer, looking at the screen with interest. In the background, another child is sitting on the floor, also engaged with a tablet. The room is decorated with colorful pillows and red storage bins on a shelf.

PART 4

THE CITIZENS' HABITS AND WILL TO USE MORE ONLINE SERVICES

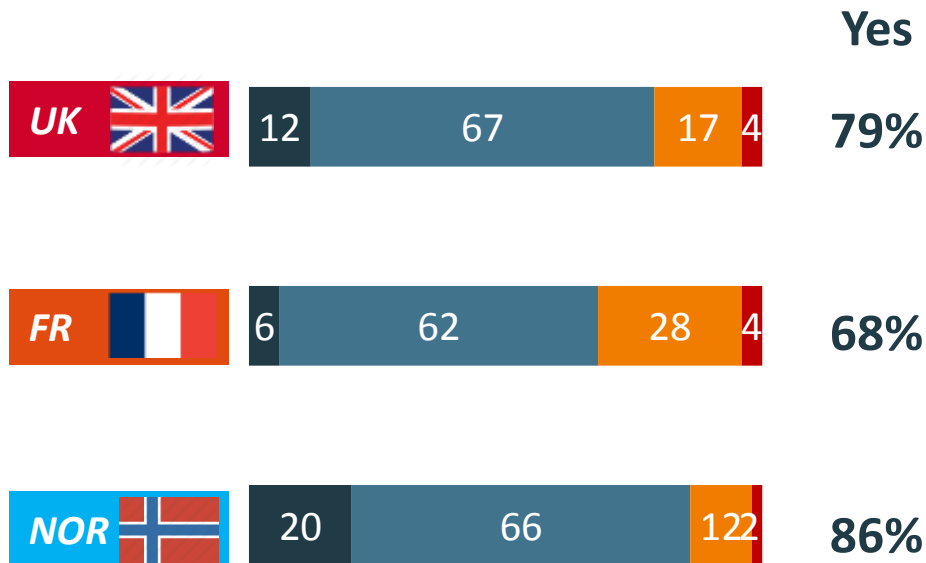
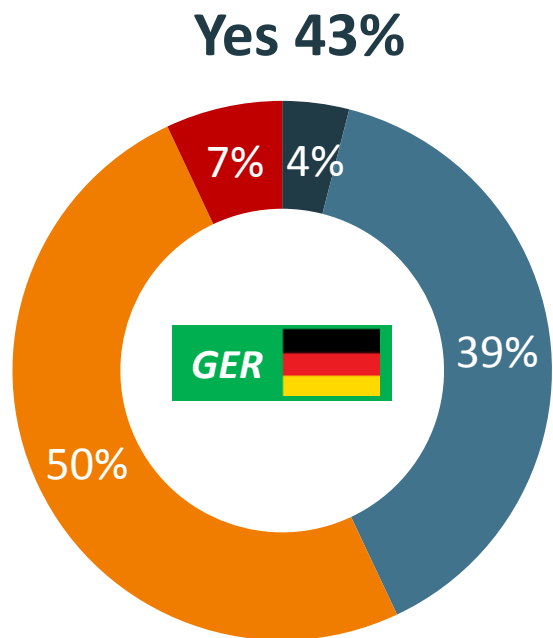
FREQUENCY OF USE OF ONLINE PUBLIC SERVICES



Question : How often do you use online public services (e.g. for declaring income, paying taxes, requesting a civil status document, paying a fine, declaring income or a change of situation to your family benefits office, etc.)?



SATISFACTION TOWARD DIGITAL PUBLIC SERVICES



Yes, absolutely

Yes, somewhat

No, not really

No, not at all



Question : Generally speaking, would you say that the digital public services meet your needs ?



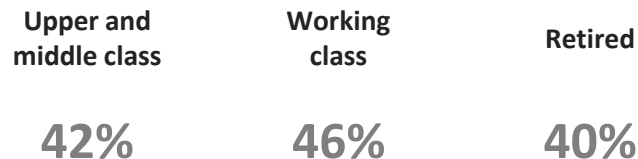
ZOOM GERMANY | YES 43%



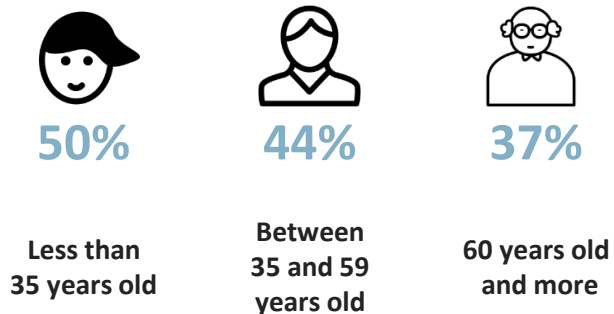
Gender



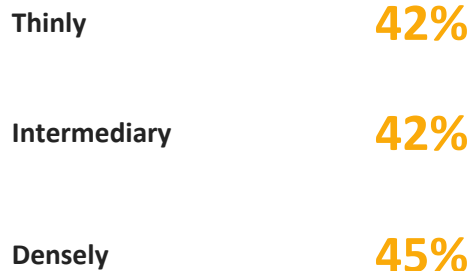
Socio professional category



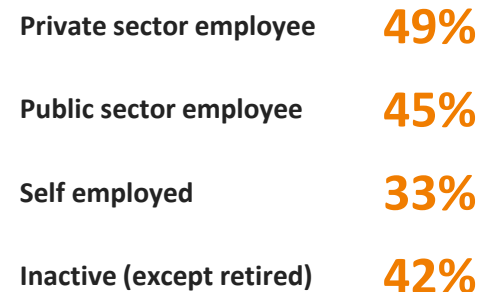
Age



Population density



Job status



Question : Generally speaking, would you say that the digital public services meet your needs ?



AUTONOMY WHEN USING DIGITAL PUBLIC SERVICES

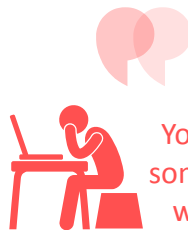
In %



You manage very well alone you are completely autonomous



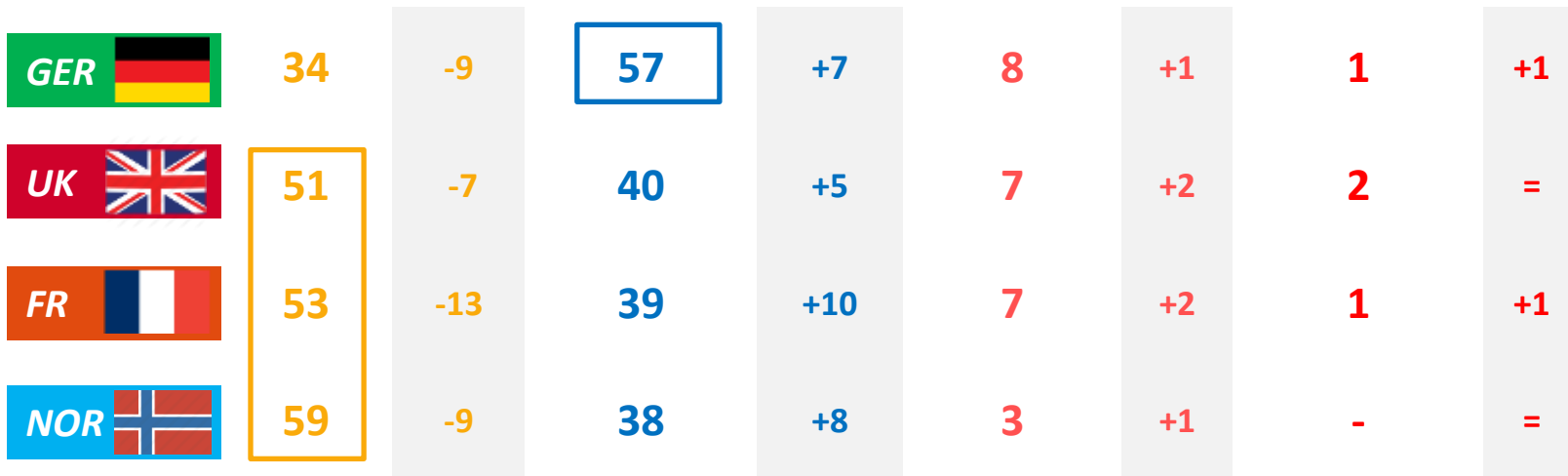
You manage reasonably well alone, even if you sometimes need some help



You encounter some difficulties without help



You cannot manage alone, you are not autonomous at all



Question : And when you use these online public services, would you say that...Base : To those who use online public services



CITIZENS' LARGEST FRUSTRATIONS WHEN USING DIGITAL PUBLIC SERVICES

In %



Need to repeat the same Information many times



It is too complicated (too many steps, too much information requested...), not intuitive enough



It is hard to find the website to start my query or transaction



It is not easy to track the status of my request



Once on the website, it is difficult to log in (password, user identification...)



Too slow



21

41

39

33

13

16



40

35

24

24

21

19



34

26

30

28

21

14



32

43

42

18

14

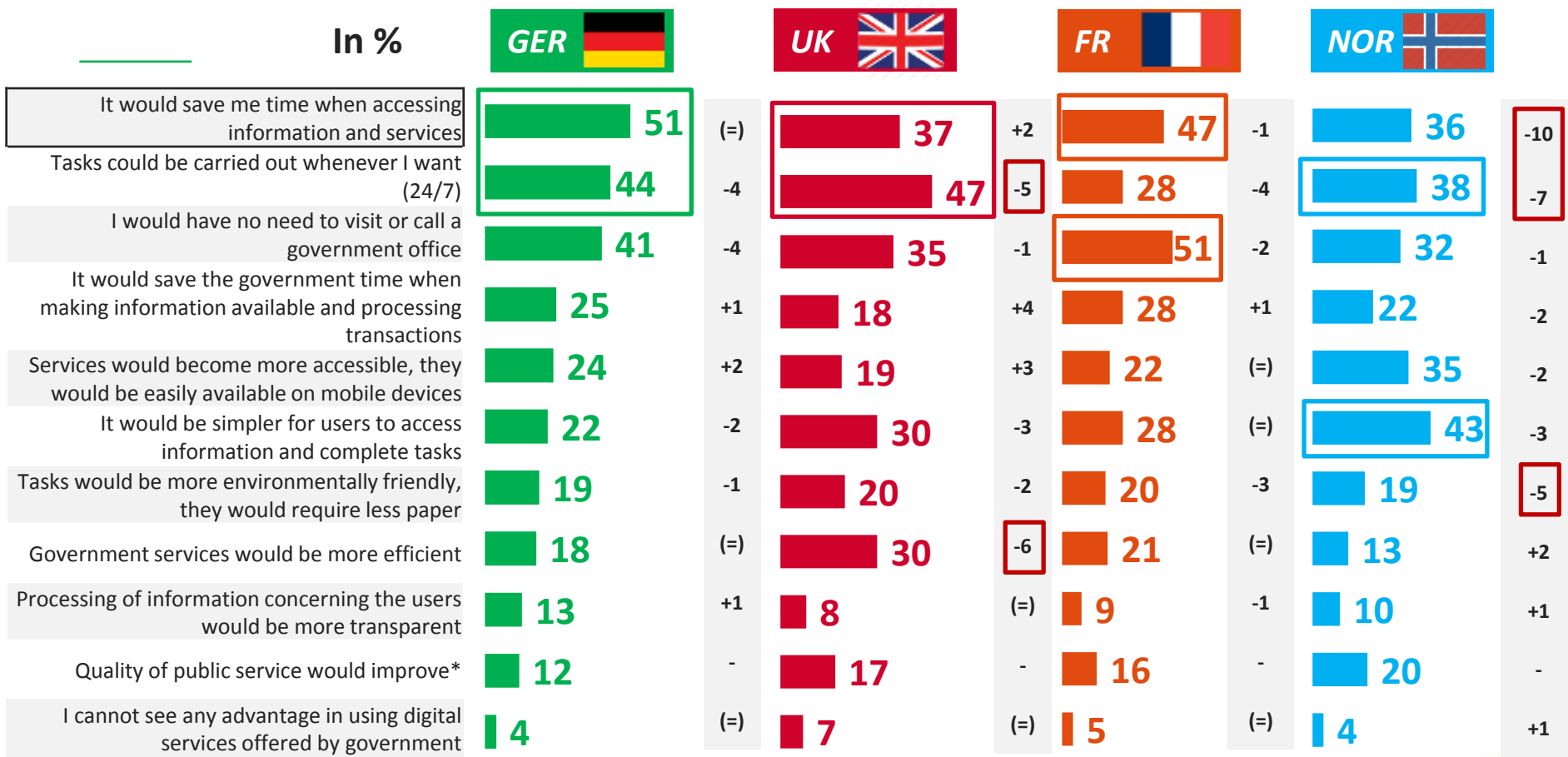
15



Question : What are your largest frustrations when using digital public services ?



MAIN ADVANTAGES IF NEW DIGITAL PUBLIC SERVICES WERE DEVELOPED



ZOOM GERMANY | ADVANTAGES IN%



51% (=)



55%
25-34 years old



57%
Upper and middle class



55%
Public sector employee

It would save me time when accessing information and services



44% -4



47%
60 years old and more



51%
Self-employed

Tasks could be carried out whenever I want (24/7)



41% -4



44%
Thinly populated cities



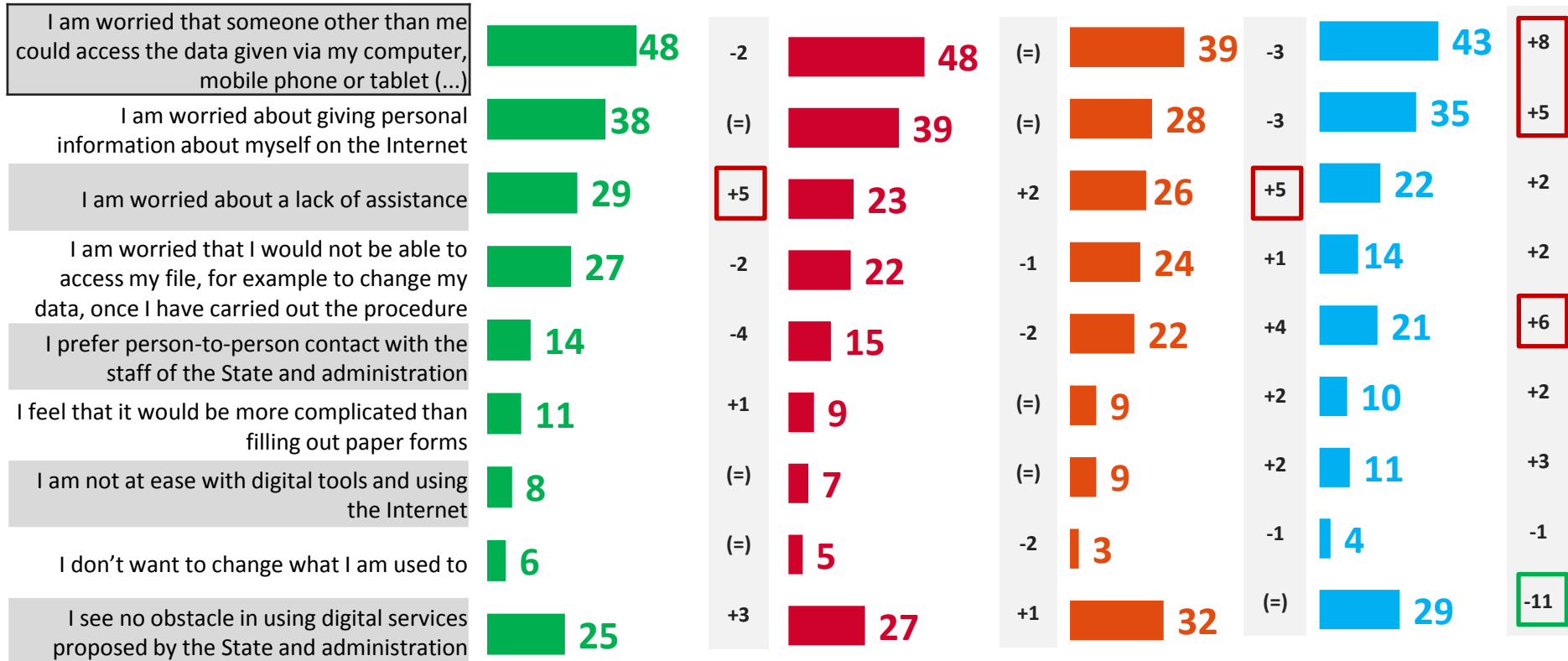
45%
Retired

I would have no need to visit or call a government office

Question : For you personally, what would be the main advantages if new digital services were developed by government?



MAIN OBSTACLES THAT WOULD DISSUADE CITIZENS FROM USING DIGITAL SERVICES



Question : For you personally, what would be the main obstacles that would dissuade you from using the digital services offered by government (national, local or devolved administrations) ?



ZOOM GERMANY | OBSTACLES IN%



48%

-2



54%

Less than
35 years old



52%

Upper and
middle class



50%

Self-
employed



38%

(=)



40%

Public sector
employee



40%

35-44 years
old



29%

+5



36%

Less than
35 years old



32%

Working
class



34%

Private sector
employee

I am worried that someone other than me could access the data given via my computer, mobile phone or tablet (...)

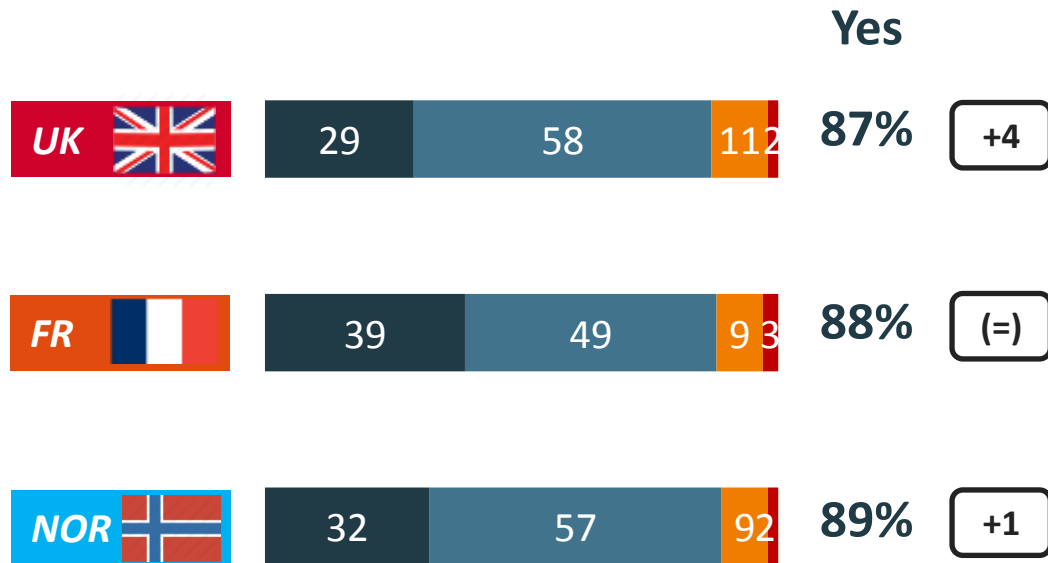
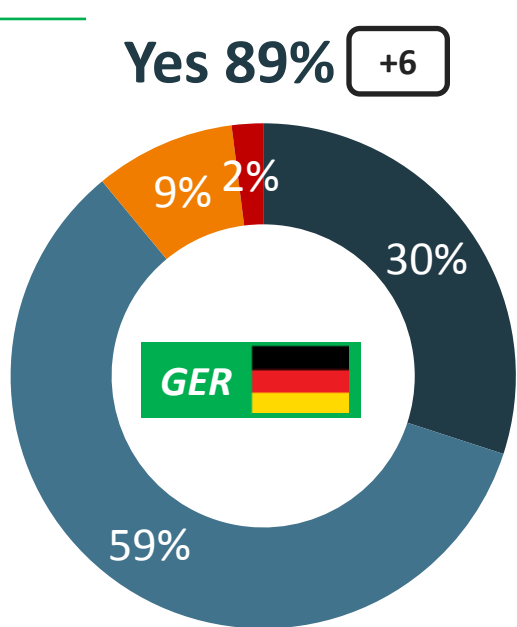
I am worried about giving personal information about myself on the Internet

I am worried about a lack of assistance

Question : For you personally, what would be the main obstacles that would dissuade you from using the digital services offered by government (national, local or devolved administrations) ?



WILL TO USE MORE ONLINE PUBLIC SERVICES



Question : If the Government were to develop an increasing number of digital tools, and notably the possibility of carrying out procedures via the Internet, would you personally be willing to use these online services, even if it would mean changing your habits?



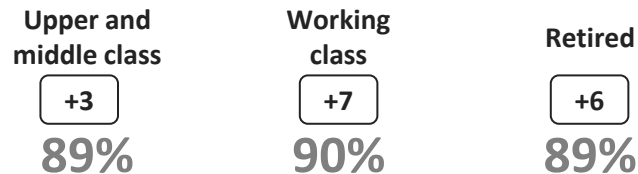
ZOOM GERMANY | YES 89% (+6)



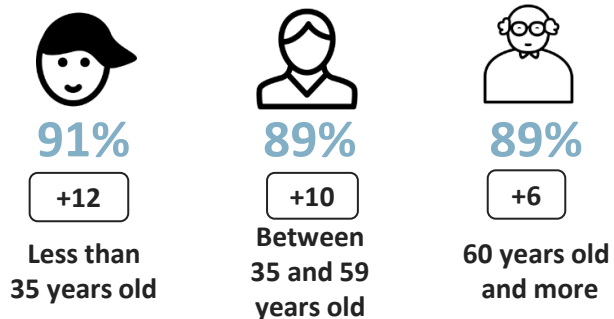
Gender



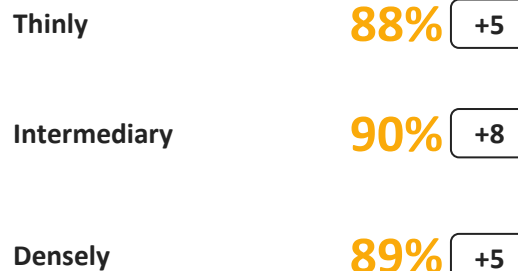
Socio professional category



Age



Population density



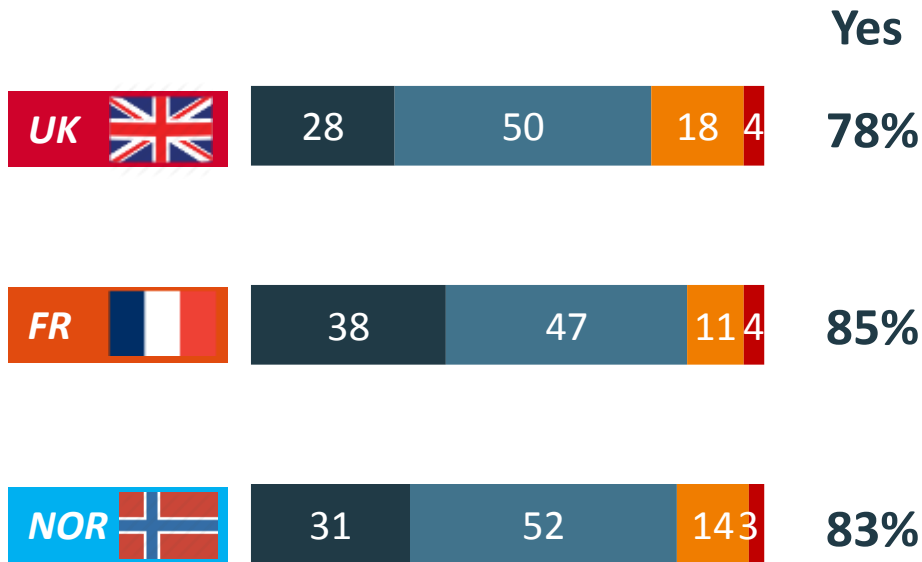
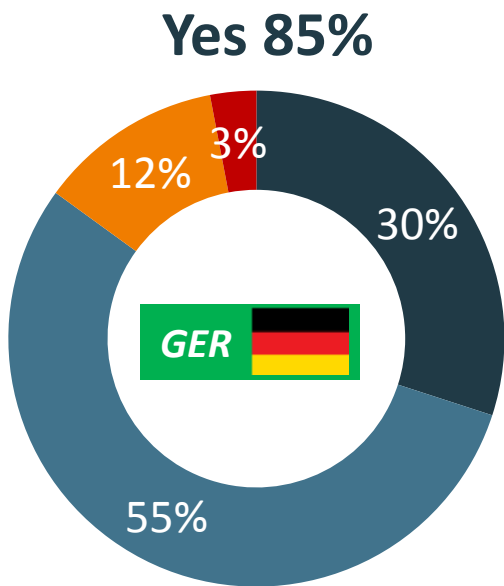
Job status



Question : If the Government were to develop an increasing number of digital tools, and notably the possibility of carrying out procedures via the Internet, would you personally be willing to use these online services, even if it would mean changing your habits?



READINESS TO CARRY OUT ALL ADMINISTRATIVE INTERACTIONS ONLINE



Yes absolutely

Yes, why not

No probably not

No, definitely not



Question : Would you be ready to carry out all of your relevant administrative interactions online ?

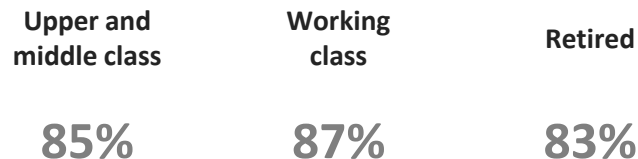


ZOOM GERMANY | YES 85%

Gender



Socio professional category



Age



87%

Less than 35 years old



85%

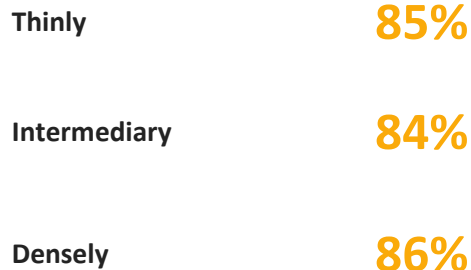
Between 35 and 59 years old



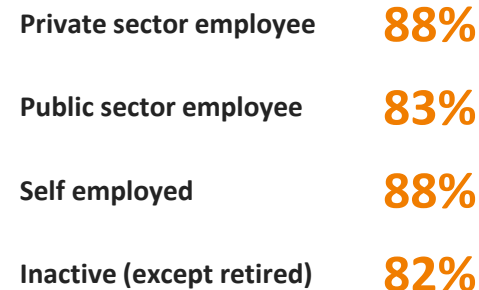
83%

60 years old and more

Population density



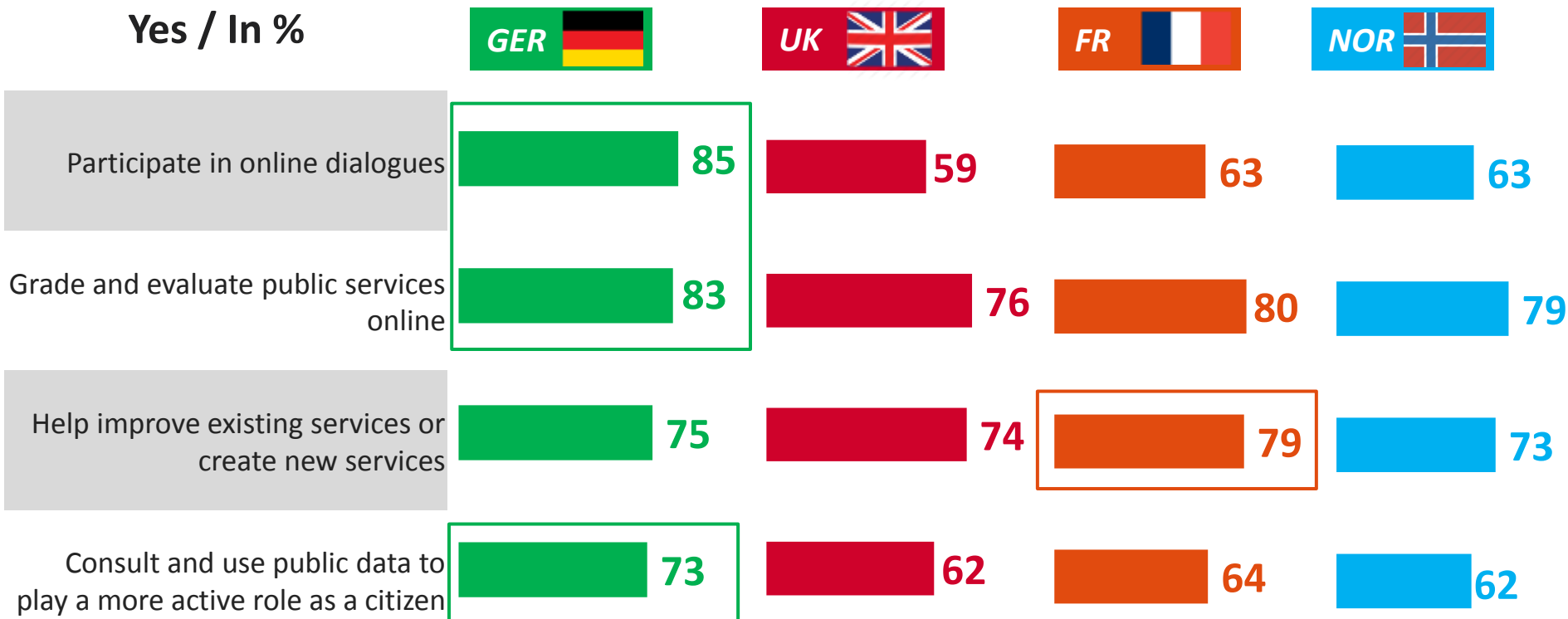
Job status



Question : Would you be ready to carry out all of your relevant administrative interactions online ?

WISH TO GET INVOLVED IN THE TRANSFORMATION OF PUBLIC SERVICES

Yes / In %



sopra  steria

Delivering Transformation. Together.

