



DIGITAL GOUV' 2018

DIGITAL GOVERNMENT BAROMETRE: THE DIGITALISATION OF THE PUBLIC SERVICES IN FIVE EUROPEAN COUNTRIES



METHODOLOGICAL NOTICE



SAMPLE

1000 respondents in five countries interviewed via Ipsos online access panel.



FIELD DATES

From September 25th to October 3rd 2018.



METHODOLOGY

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

READING NOTE

=/ +/-

Evolution compared to 2017



New question en 2018



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



COUNTRIES WHERE INTERVIEWS WERE CONDUCTED

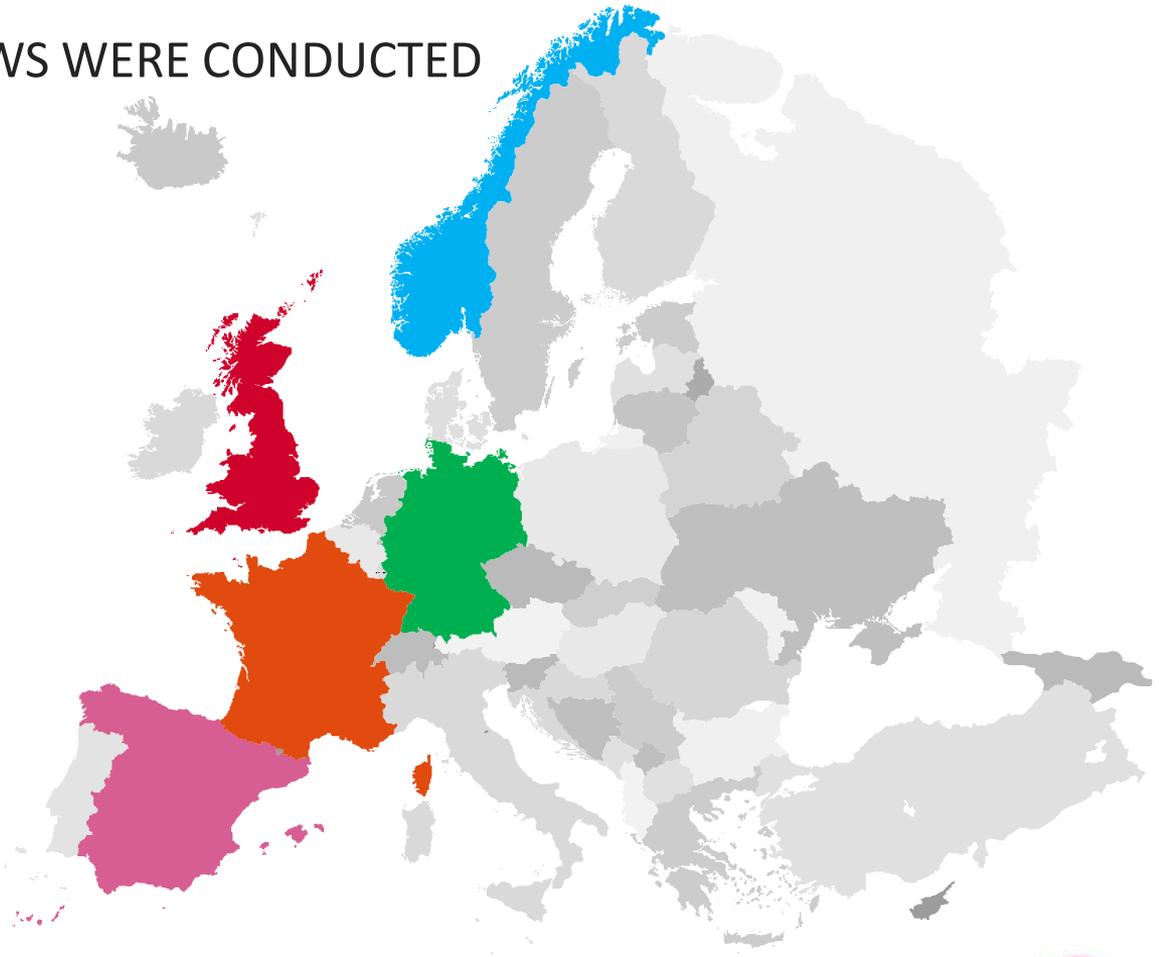
 **FRANCE**
1000 interviews

 **UNITED KINGDOM**
1000 interviews

 **GERMANY**
1000 interviews

 **NORWAY**
1000 interviews

 **SPAIN**
1000 interviews



SUMMARY

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PART 1

THE STATE'S DIGITAL TRANSFORMATION

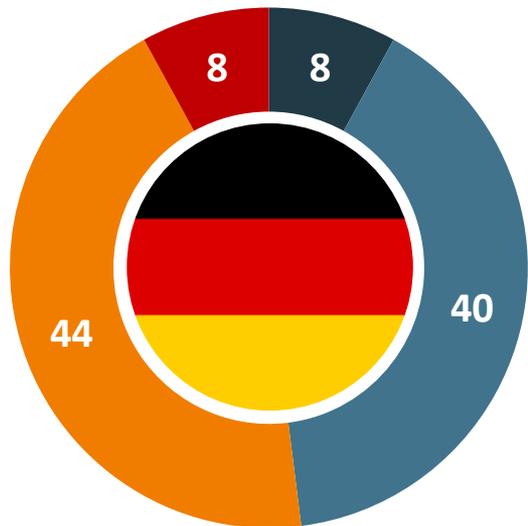
THE CURRENT DEGREE OF DIGITAL DEVELOPMENT

IN %

ADVANCED 48

42/53

Results
2017/2016



NEW



ADVANCED	2017	2016
----------	------	------

FR	8	64	26	2	72	66	70
NOR	7	75	18	0	82	75	75
UK	8	57	31	4	65	64	64
NEW SP	8	56	34	2	64	-	-

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?



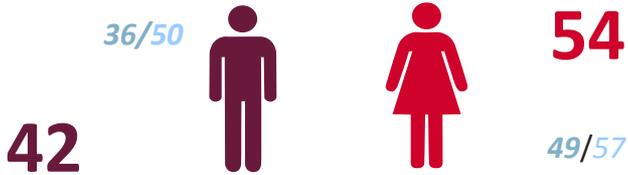


ZOOM GERMANY | SUBTOTAL ADVANCED 48 (42/53)

IN %

Results
2017/2016

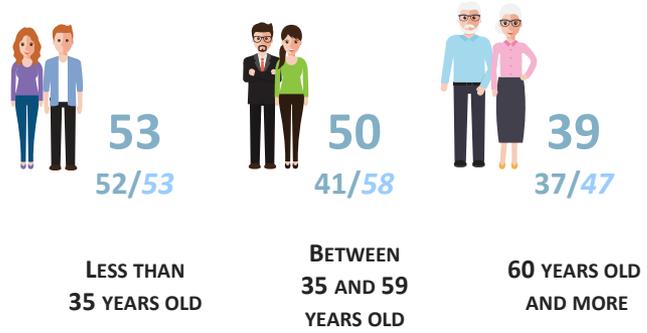
Gender



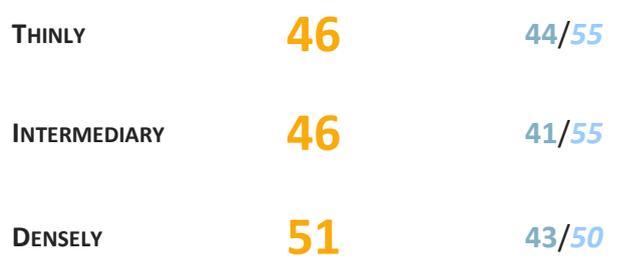
Socio professional category



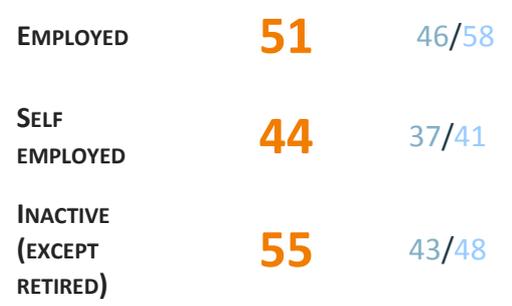
Age



Population density



Job status

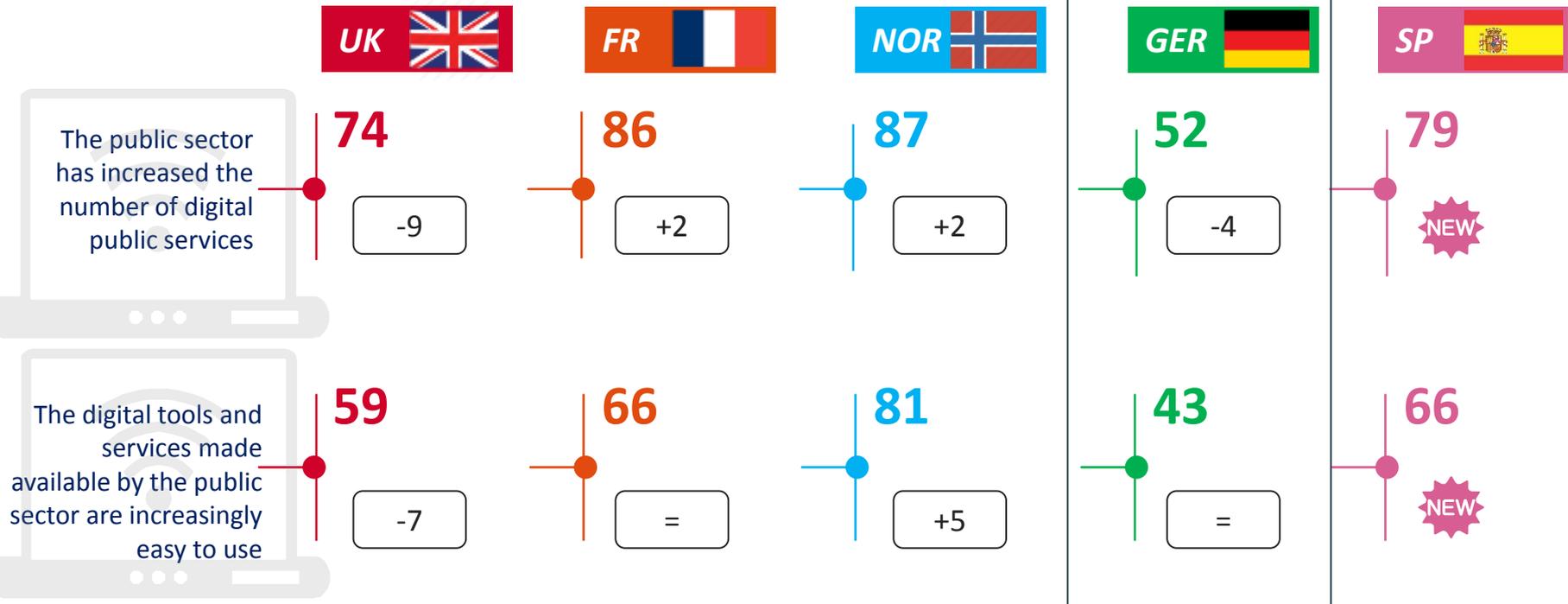


Question : How would you describe the current degree of digital development – i.e. use of the Internet and digital services – in the Government (*national, local or devolved administrations*) and its services?



NUMBER AND USER-FRIENDLINESS OF DIGITAL PUBLIC SERVICES

SUBTOTAL YES IN %



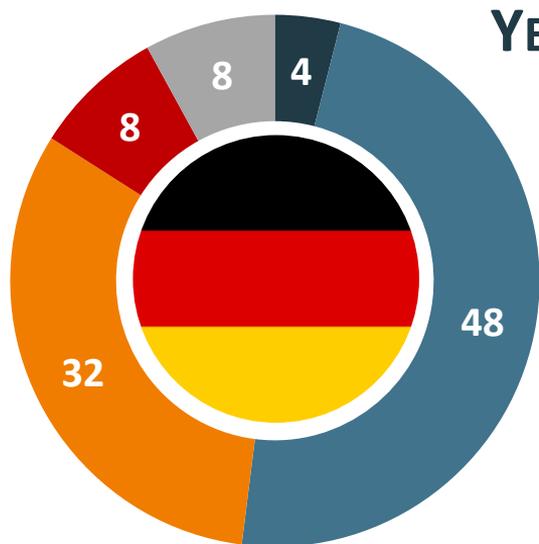
Question : Would you say that, in recent years... [the public sector has increased the number of digital public services/the digital tools and services made available by the public sector are increasingly easy to use] ?



NUMBER OF DIGITAL SERVICES IN THE PUBLIC SECTOR

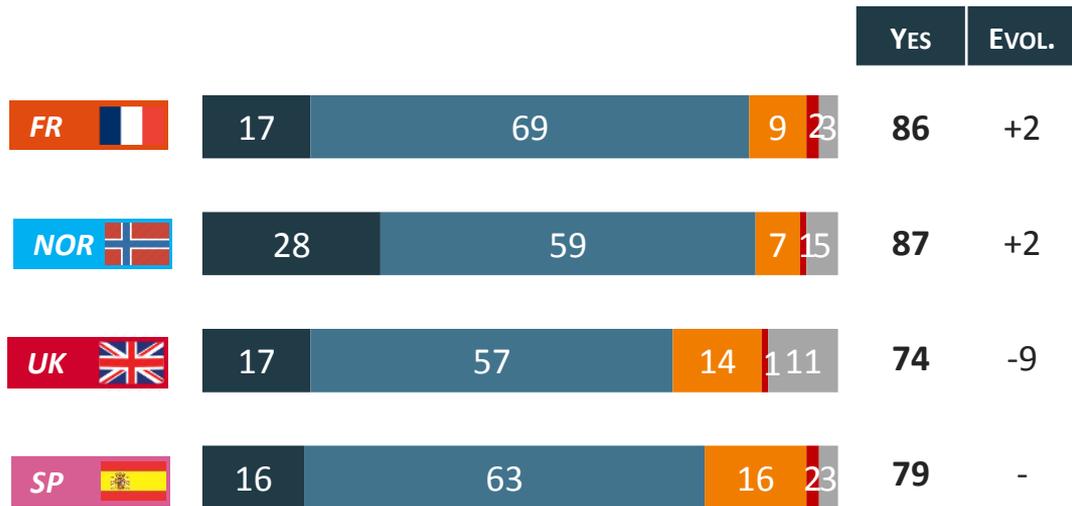
IN %

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



YES 52

-4



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 52 (2017 : 56)

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

IN %

Gender

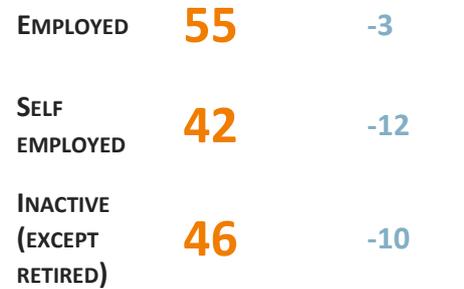
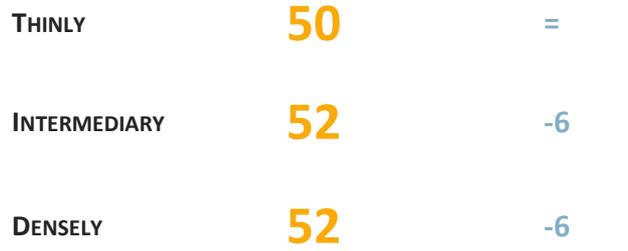
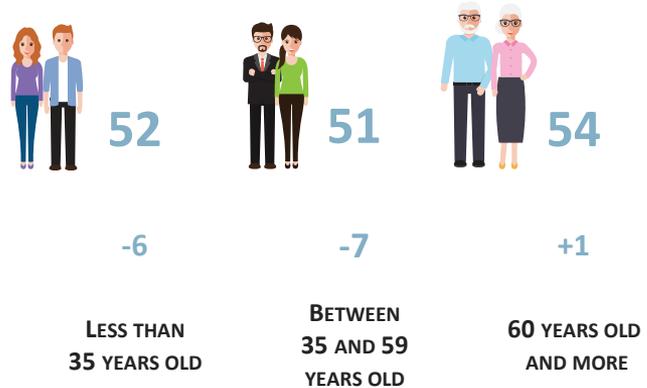
Socio professional category



Age

Population density

Job status



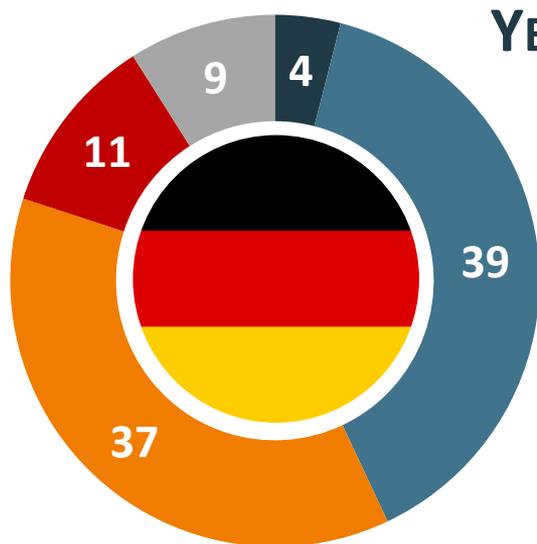
Question : Would you say that, in recent years... the public sector has increased the number of digital public services ?



USER-FRIENDLINESS OF DIGITAL SERVICES IN THE PUBLIC SECTOR

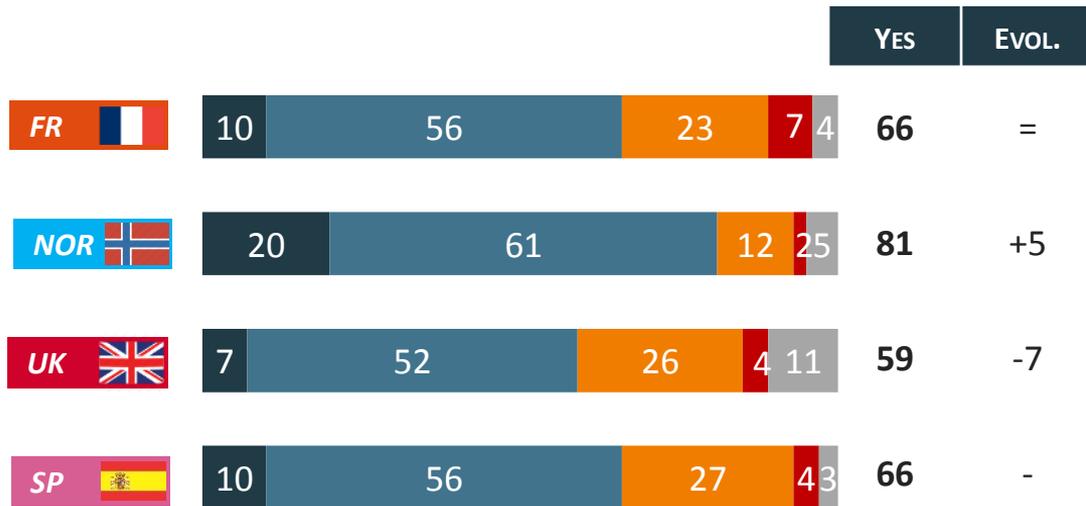
IN %

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



YES 43

=



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 (2017 : 43)

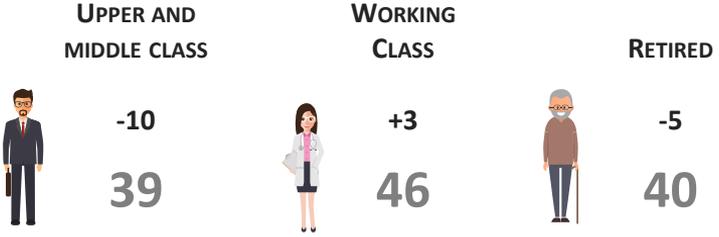
... the digital tools and services made available by the public sector are increasingly easy to use

IN %

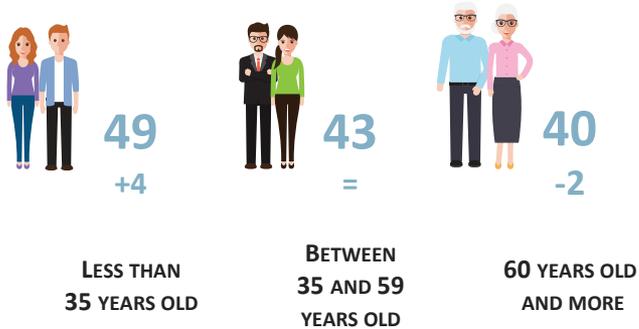
Gender



Socio professional category



Age



Population density



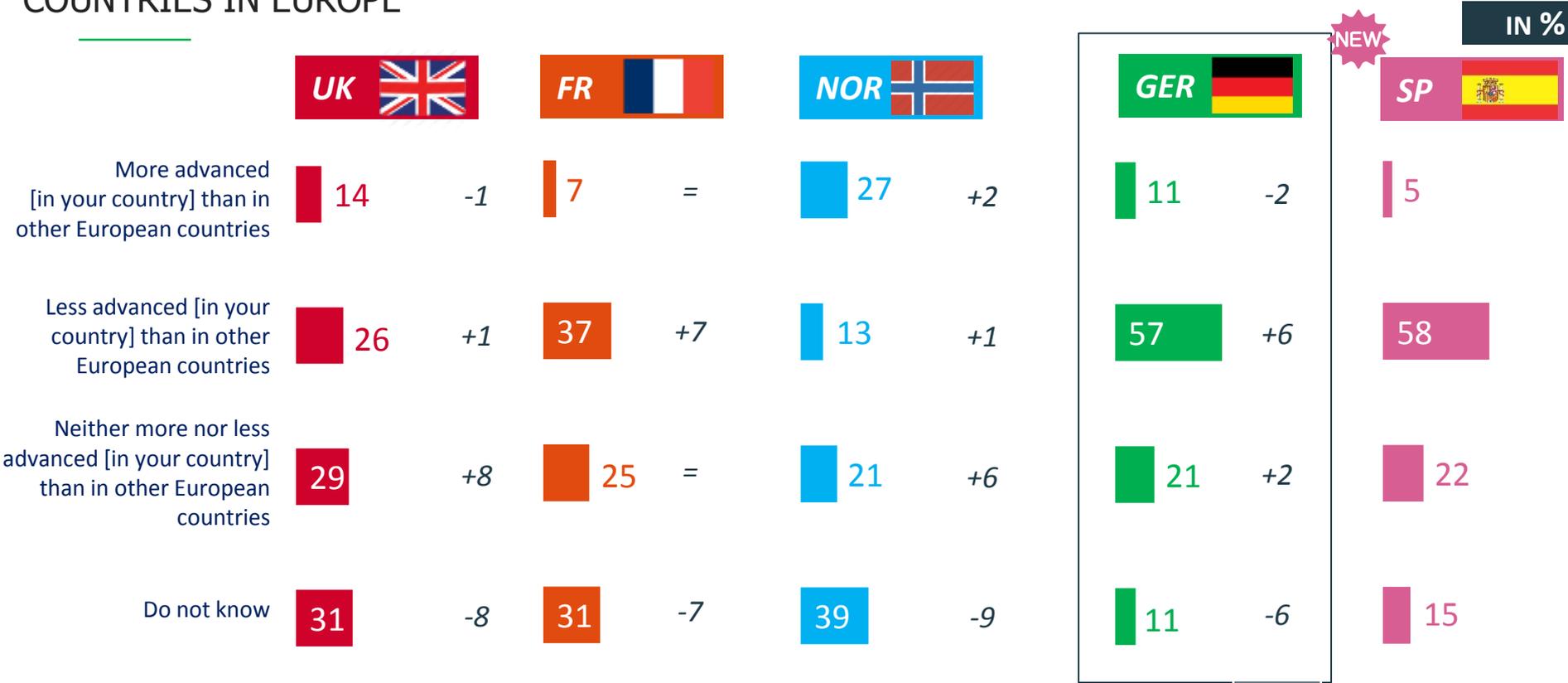
Job status



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 EACH COUNTRY COMPARED TO OTHER COUNTRIES IN EUROPE



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





ZOOM GERMANY | SUBTOTAL LESS ADVANCED 57 (2017 : 51)

IN %

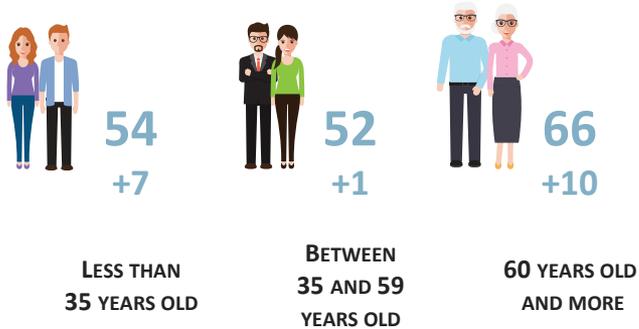
Gender



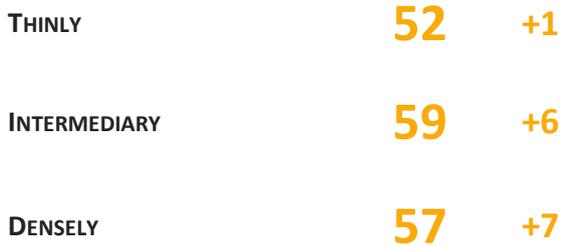
Socio professional category



Age



Population density



Job status



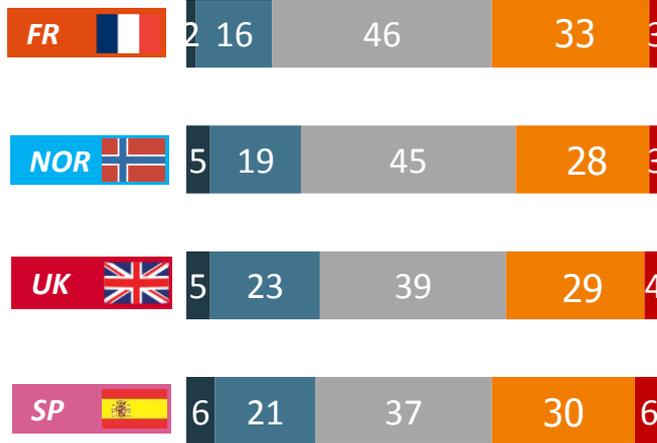
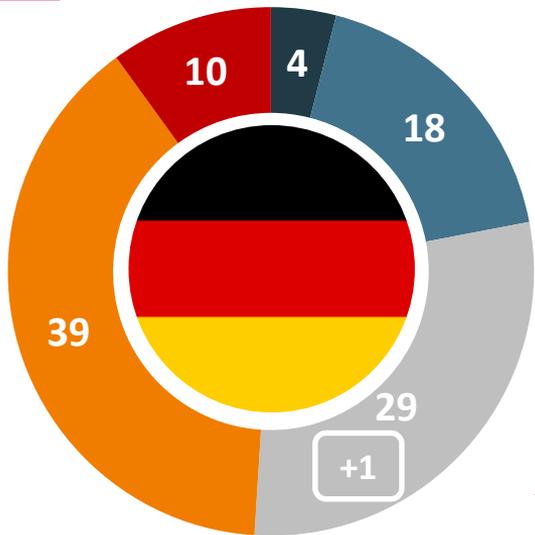
Question : And would you say that the development of digital public services is...



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

IN %

-3 BEHIND **49** ADVANCED **22** **+2**



Adv.	BEHIND	EVOL: ADV	EVOL: SAME	EVOL: BEHIND
18	36	=	-6	+6
24	31	+5	+4	-9
28	33	-2	+3	-1
27	36	-	-	-

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 | SUBTOTAL ADVANCED 22 (2017: 20)

IN %

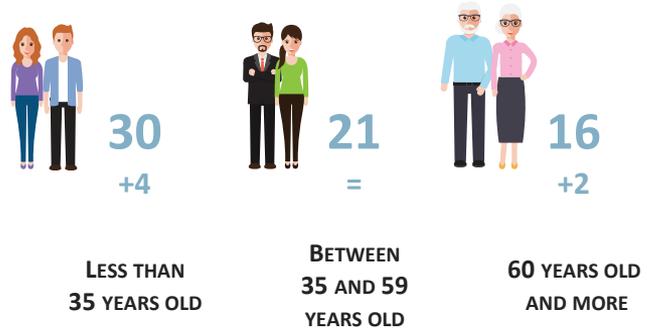
Gender



Socio professional category



Age



Population density



Job status

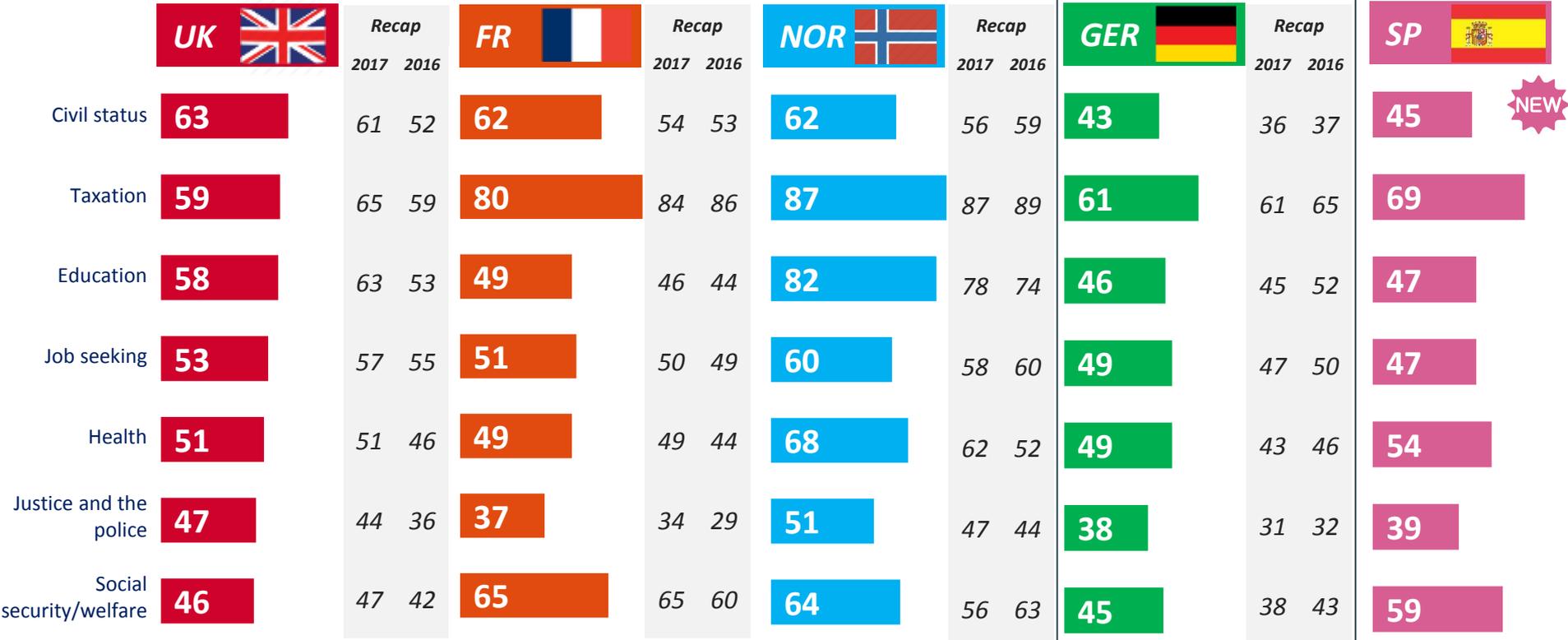


Question : In your opinion, compared to digital services offered by private companies, digital services offered by the public sector in [your country] are...



THE CURRENT DEGREE OF DIGITAL DEVELOPMENT IN DIFFERENT SECTORS

SUBTOTAL ADVANCED IN %



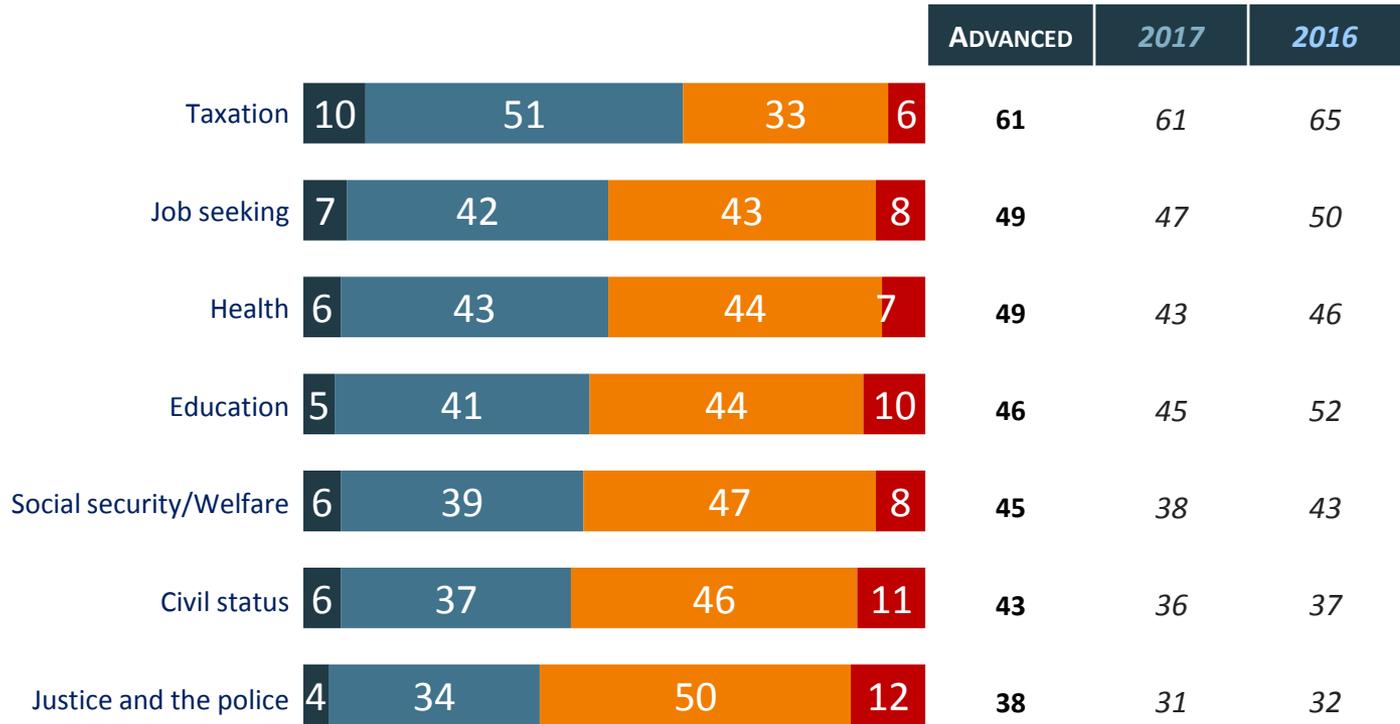
Question : How would you judge the development of digital services in each of the following areas of public sectors ?





ZOOM GERMANY | DETAIL

IN %



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



A smiling man with short dark hair, wearing a light blue button-down shirt, is looking down at a smartphone he is holding in his hands. The background is a plain, light gray. A red horizontal bar is at the top of the image. A white horizontal bar is overlaid across the middle of the image, containing text.

PART 2

**USERS AND CITIZENS AT THE HEART OF THE DIGITAL
TRANSFORMATION**

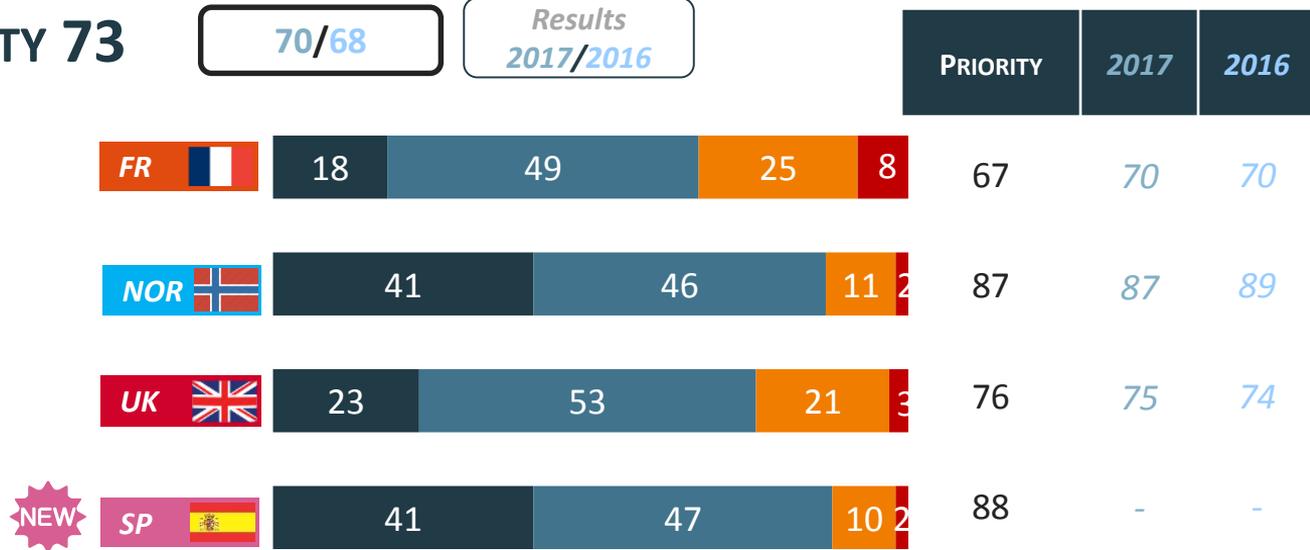
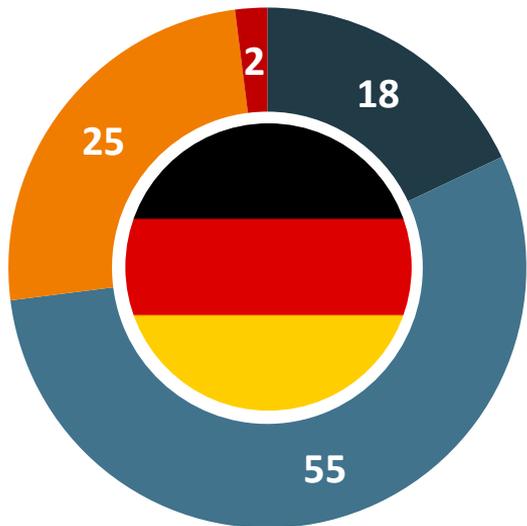
PRIORITY OF THE DIGITAL DEVELOPMENT IN THE RELATIONS BETWEEN THE STATE AND THE POPULATION

PRIORITY 73

70/68

Results
2017/2016

IN %



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 | SUBTOTAL PRIORITY 73 (70/68)

IN %

Results
2017/2016

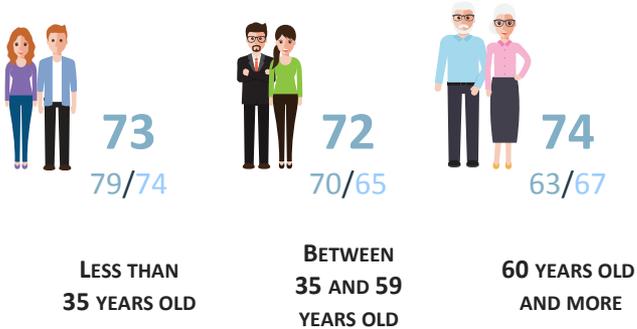
Gender



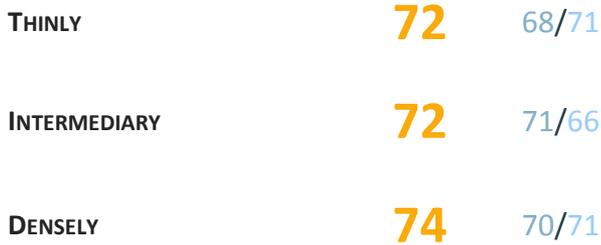
Socio professional category



Age



Population density



Job status

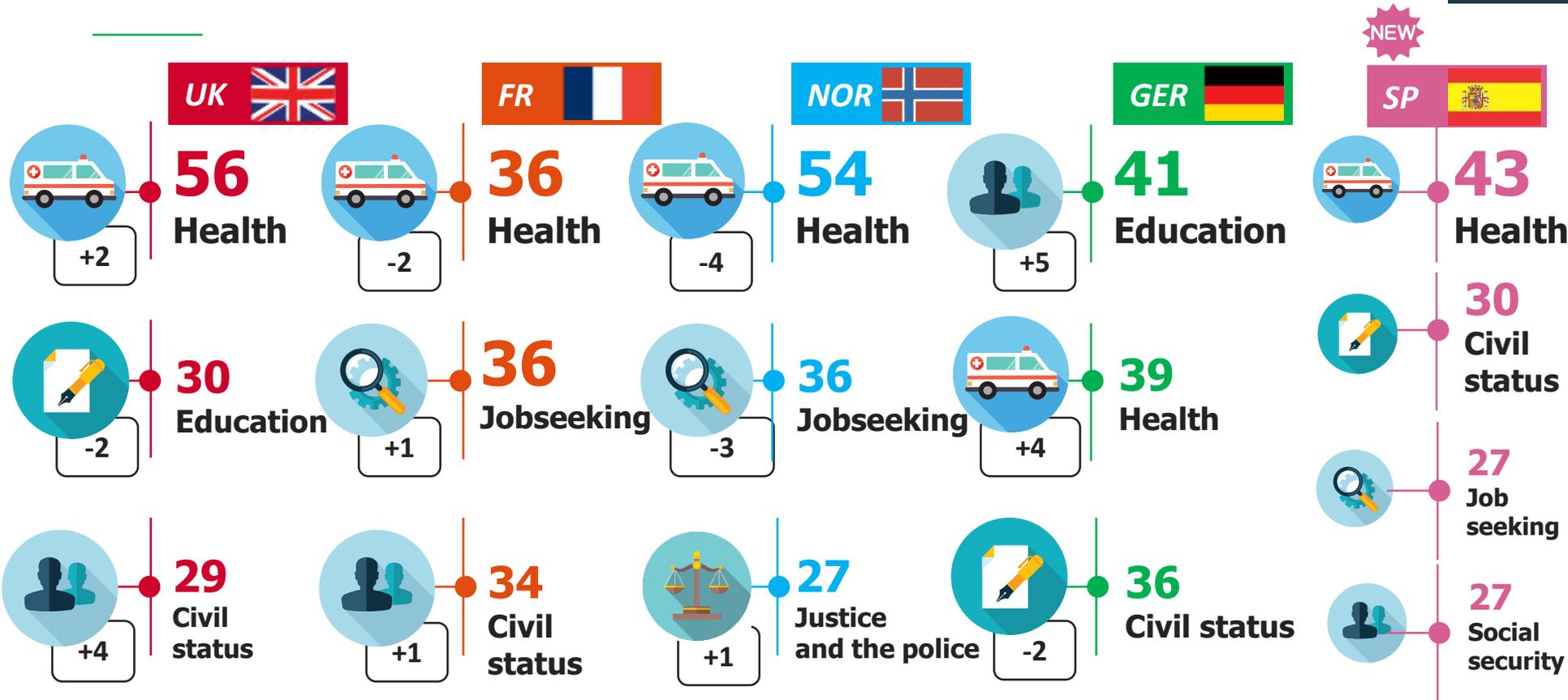


Question : In your opinion, is it a priority that the State should increasingly use Internet and digital services in its relations with the population?



TOP 3 : PUBLIC SECTORS WHICH SHOULD BE DIGITALISE IN PRIORITY

IN %

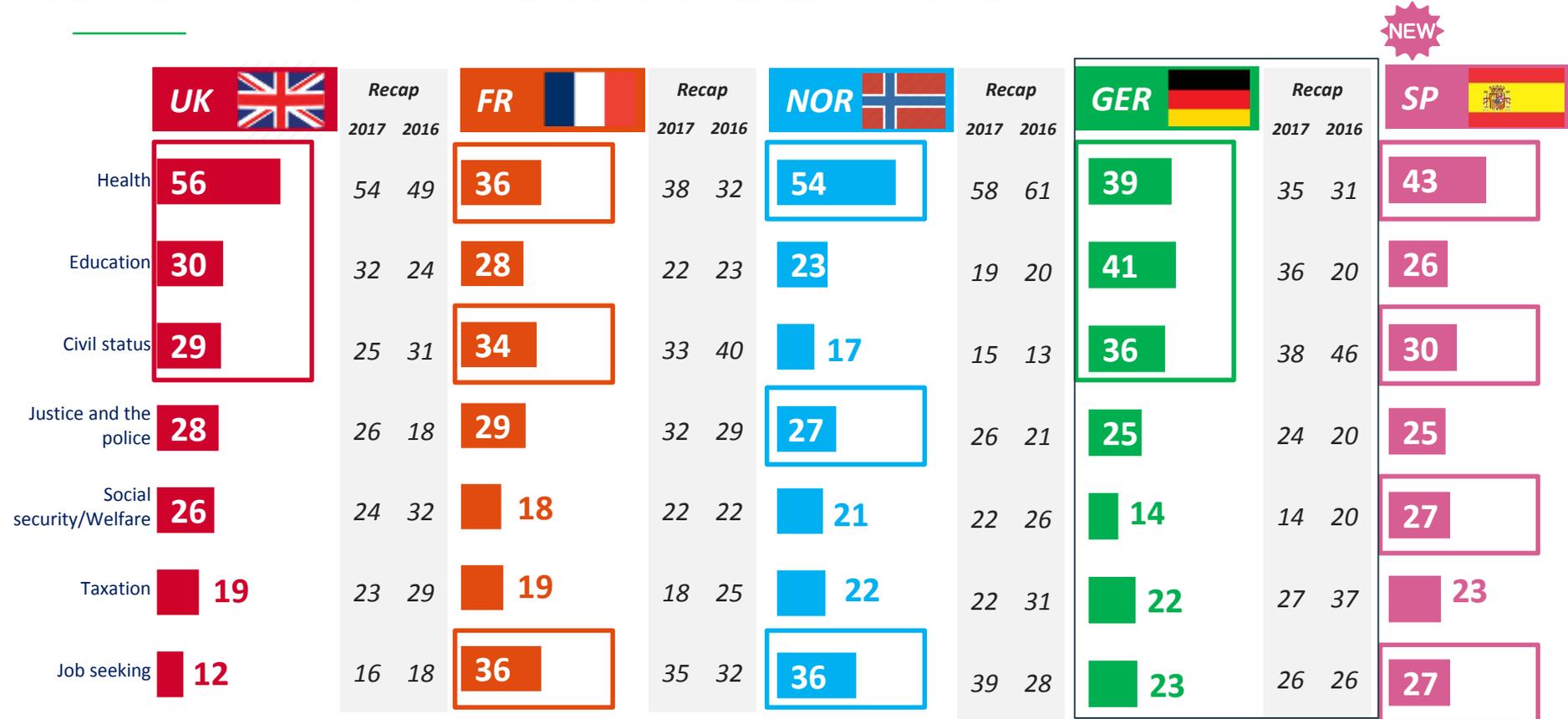


Question : And in your opinion, which areas of public sectors should make the digital development – i.e. use of the Internet and digital services – a priority?



PUBLIC SECTORS WHICH SHOULD BE DIGITALISED IN PRIORITY

TOTAL IN %

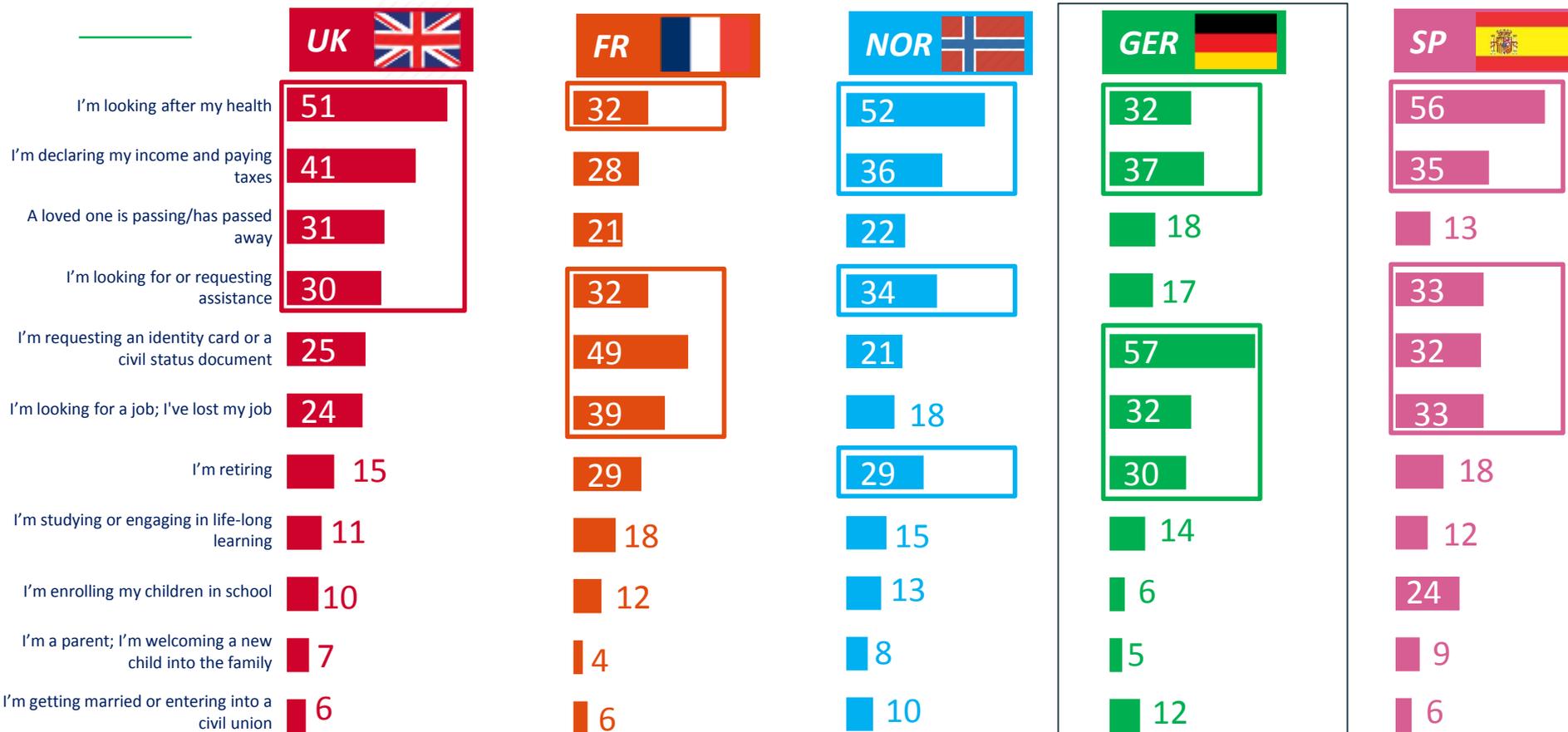


Question : And in your opinion, which areas of the public sectors should make the digital development – i.e. use of the Internet and digital services – a priority?



LIFE EVENTS ONLINE PROCEDURES WHICH SHOULD BE SIMPLIFIED IN PRIORITY

TOTAL IN %

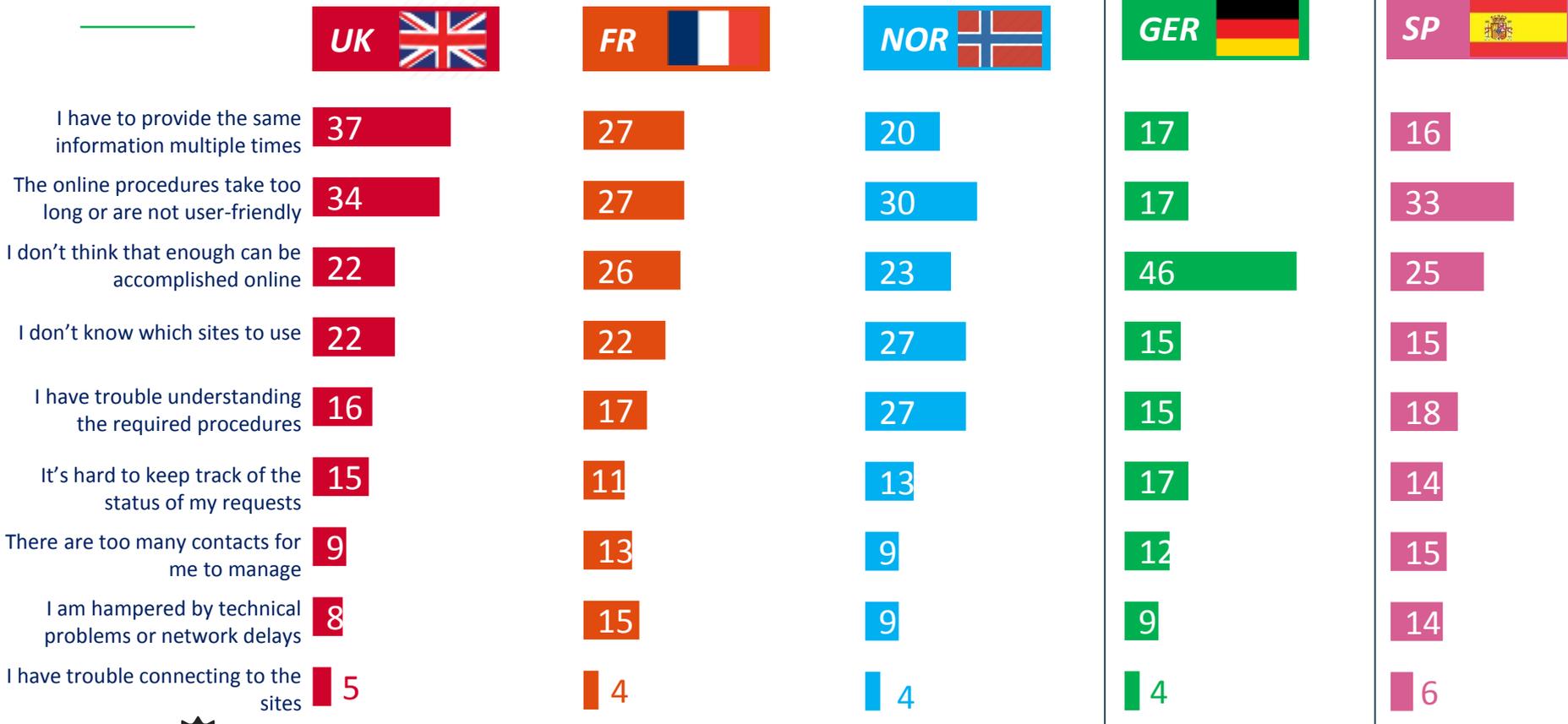


Question : And which online procedures linked to these life events do you think need to be simplified as a priority?



REASONS WHY LIFE EVENTS PROCEDURES SHOULD BE SIMPLIFIED

TOTAL "ALL PROCEDURES", IN %



Question : Why should these online procedures be simplified?





REASONS WHY LIFE EVENTS PROCEDURES SHOULD BE SIMPLIFIED, DETAIL

IN %

	I'm requesting an identity card ...	I'm studying ...	I'm getting married...	I'm declaring my income ...	I'm looking for or requesting assistance	I'm looking for a job; I've lost my job	I'm looking after my health	I'm retiring	A loved one is passing/has passed away
There are too many contacts for me to manage	8	12	13	6	18	13	17	17	19
I have trouble understanding the required procedures	9	14	9	14	24	12	11	25	27
I don't think that enough can be accomplished online	56	47	55	52	31	40	40	44	41
I have to provide the same information multiple times	17	11	8	20	15	23	19	12	23
The online procedures take too long or are not user-friendly	16	21	22	22	15	20	15	12	11
I don't know which sites to use	14	20	12	8	15	15	22	17	18
I have trouble connecting to the sites	3	4	6	2	5	2	6	4	2
It's hard to keep track of the status of my requests	14	17	8	16	31	21	17	17	12
I am hampered by technical problems or network delays	9	11	6	9	11	9	6	8	16

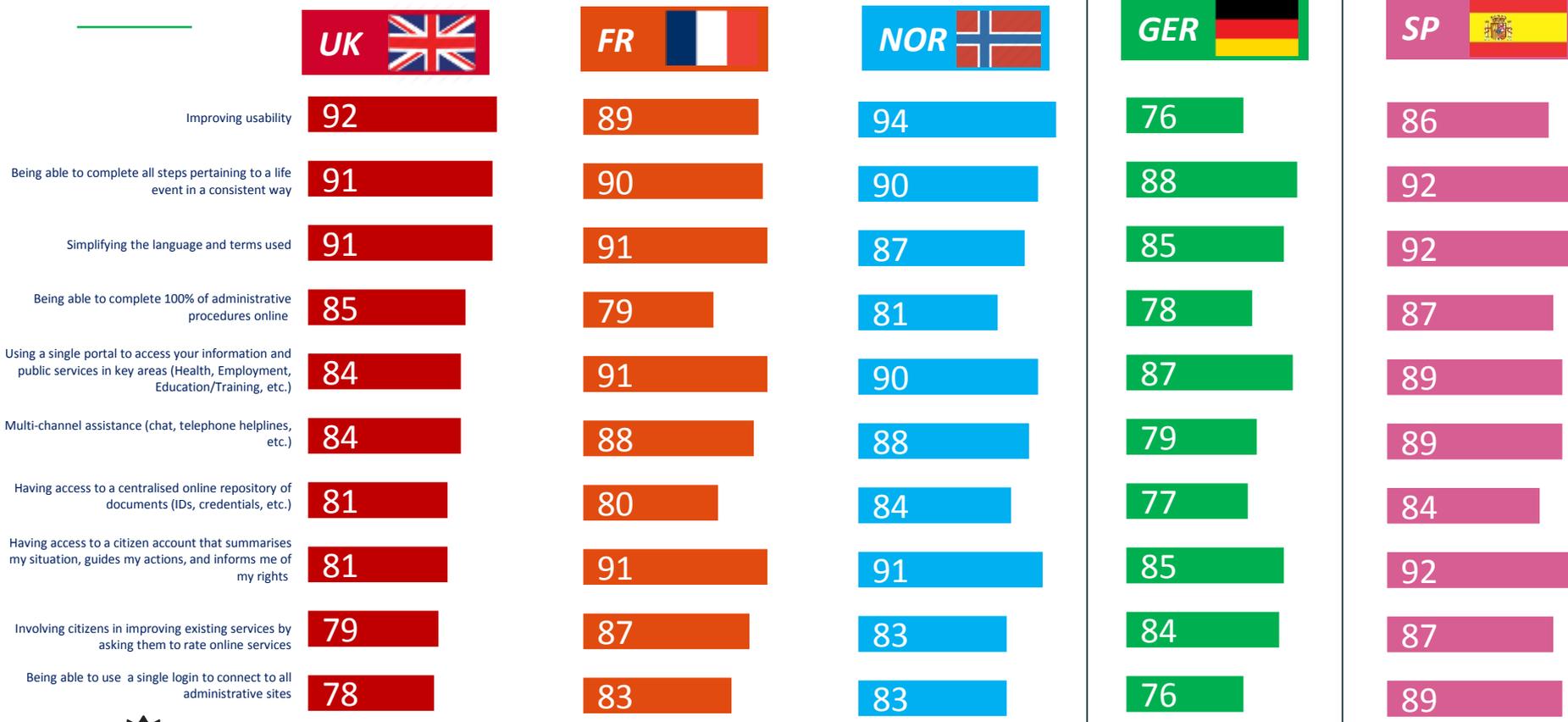


Question : Why should these online procedures be simplified?

Only life events for which we have sufficient bases are displayed

CHANGES THAT COULD SIMPLIFY THESE ONLINE PROCEDURES

SUBTOTAL YES, IN %

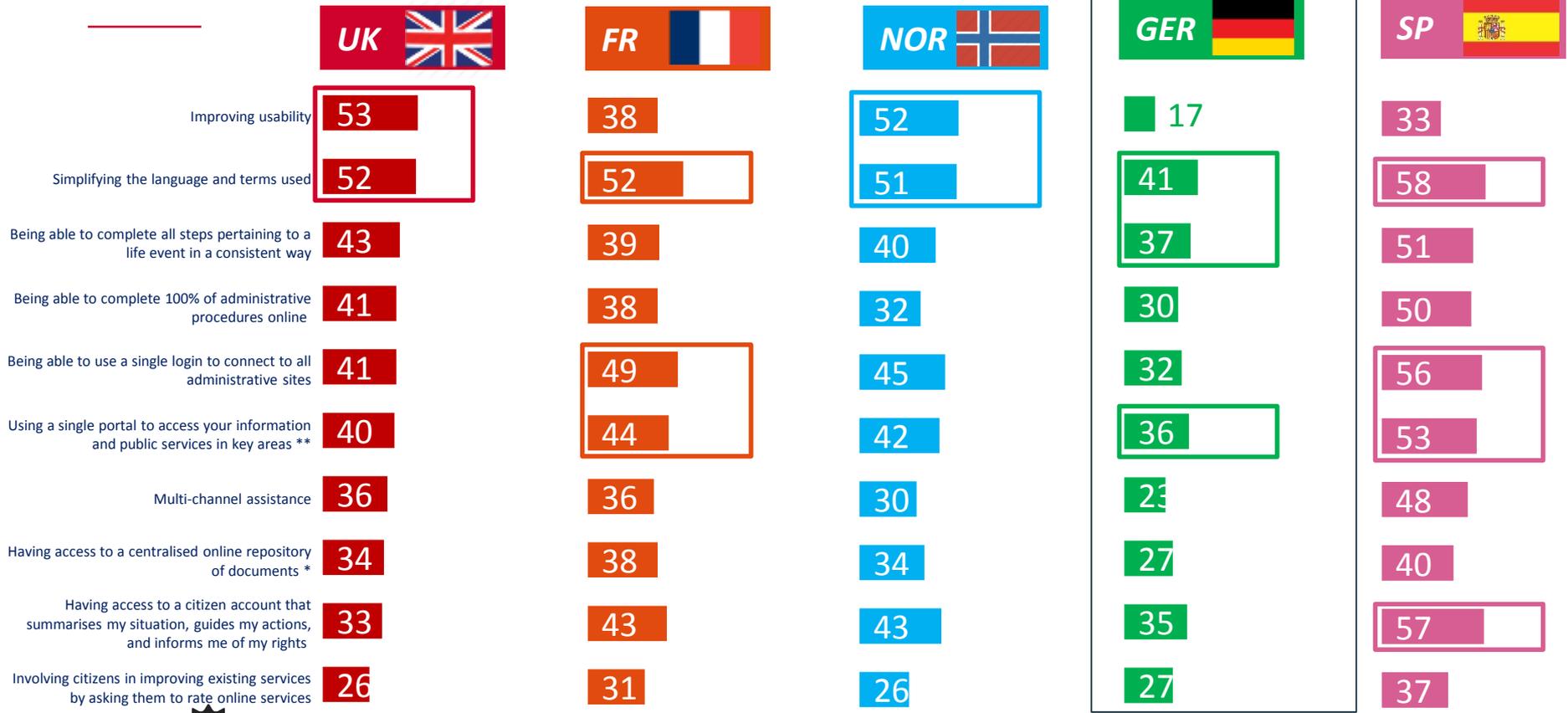


Question : Do you think that the following changes would help simplify these online procedures?



CHANGES THAT COULD SIMPLIFY THESE ONLINE PROCEDURES

YES ABSOLUTELY, IN %



Question : Do you think that the following changes would help simplify these online procedures?

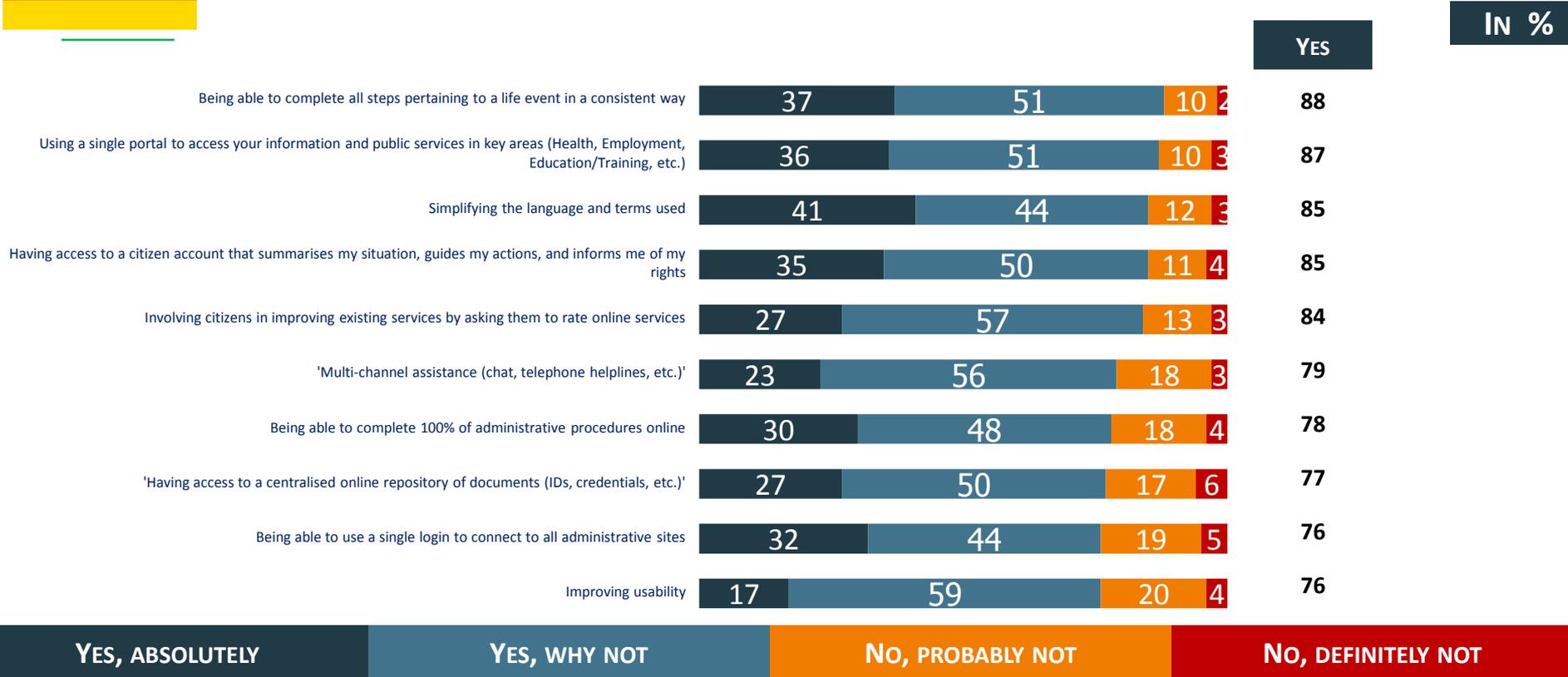
* (IDs, credentials, etc.)

** (Health, Employment, Education/Training, etc.)





ZOOM GERMANY | DETAIL



Question : Do you think that the following changes would help simplify these online procedures?



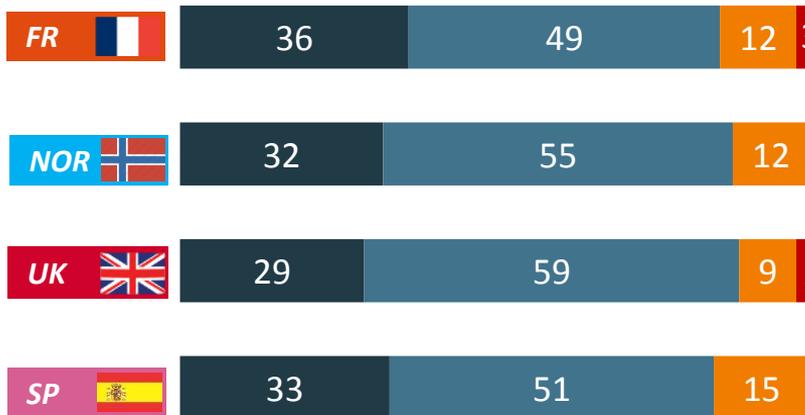
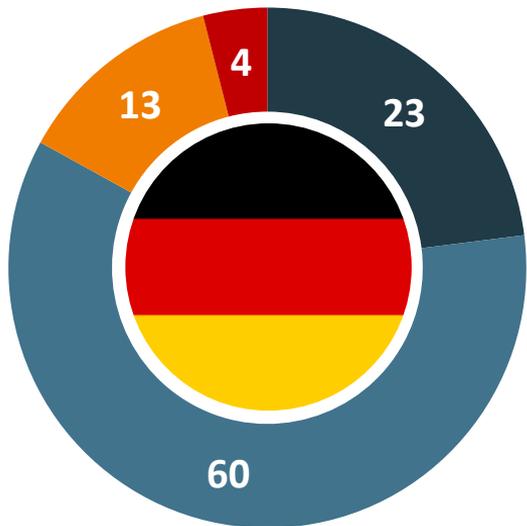
WILL TO USE MORE ONLINE PUBLIC SERVICES

IN %

YES 83

(85)*

Results 2017



YES	2017	2016
-----	------	------

85	(85)*	-
87	(83)*	-
88	87	83
84	-	-

*Question was slightly modified between 2017 and 2018. Please see below.

YES WITHOUT HESITATION

YES, WHY NOT

NO PROBABLY NOT

NO, DEFINITELY NOT

Question UK (2018 and 2017) : 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?

Question FR / NOR / GER / SP :

2018 : Would you be ready to carry out all of your relevant interactions online, even if it would mean changing your habits?

2017 : Would you be ready to carry out all of your relevant interactions online?

© Ipsos – Digital Gov' 2018 Sopra Steria – October 2018





ZOOM GERMANY | SUBTOTAL YES 83 (85*)

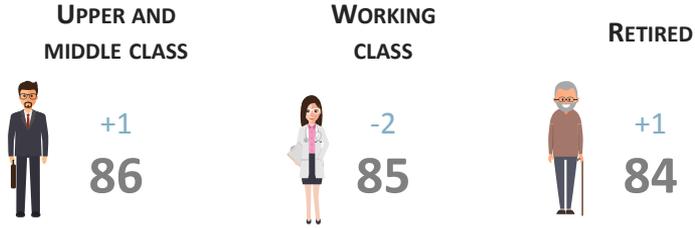
IN %

Results 2017

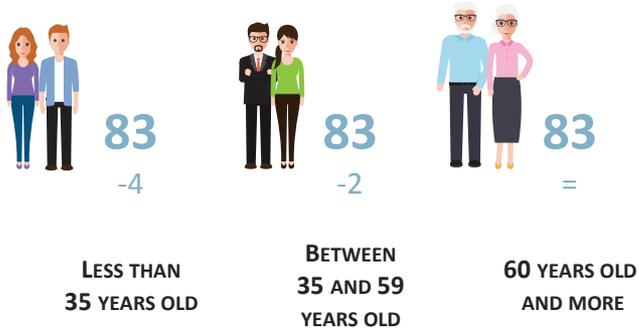
Gender



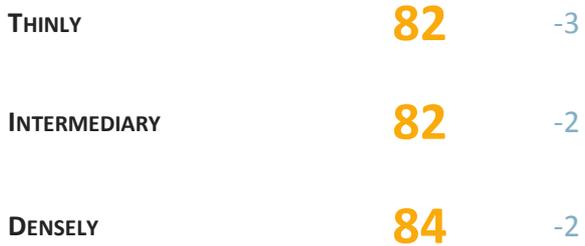
Socio professional category



Age



Population density



Job status



*Question was slightly modified between 2017 and 2018. Please see below.

Question FR / NOR / GER / SP :

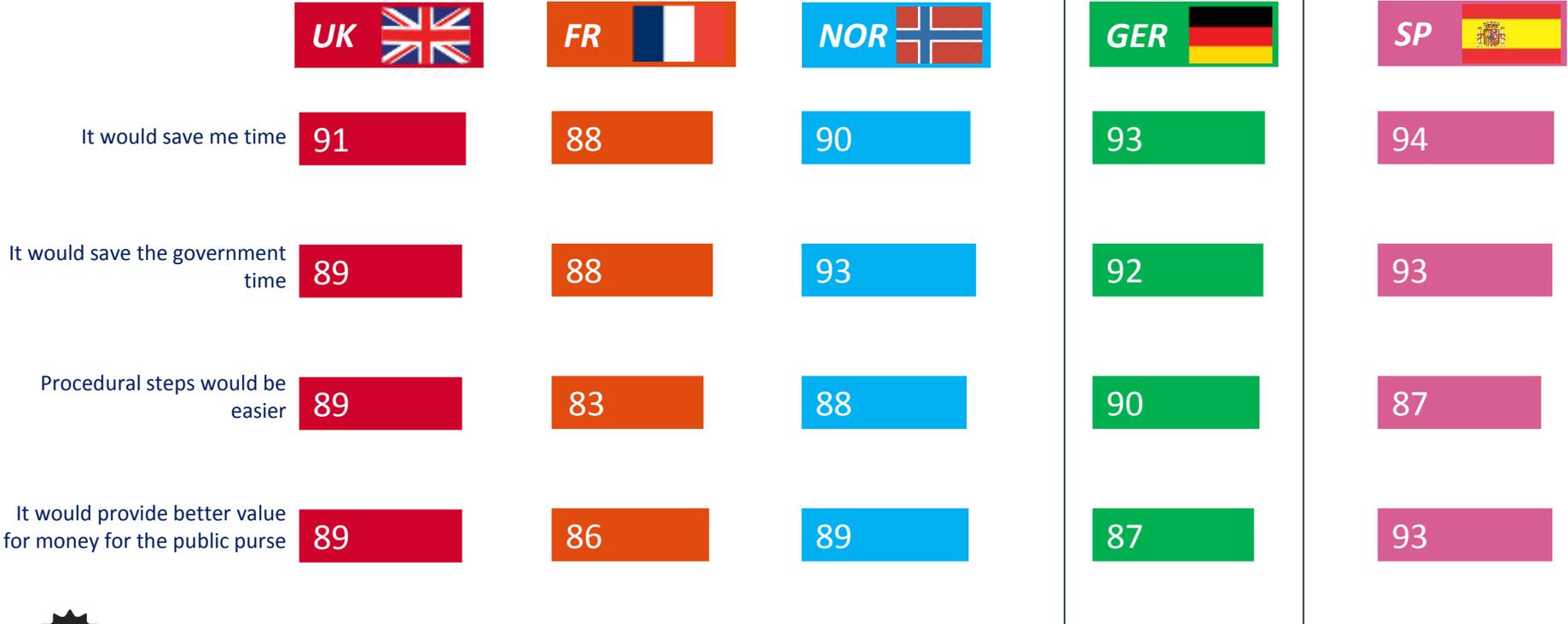
2018 : Would you be ready to carry out all of your relevant interactions online, even if it would mean changing your habits?

2017 : Would you be ready to carry out all of your relevant interactions online?



PROS OF DIGITAL PUBLIC SERVICES

SUBTOTAL AGREE, IN %

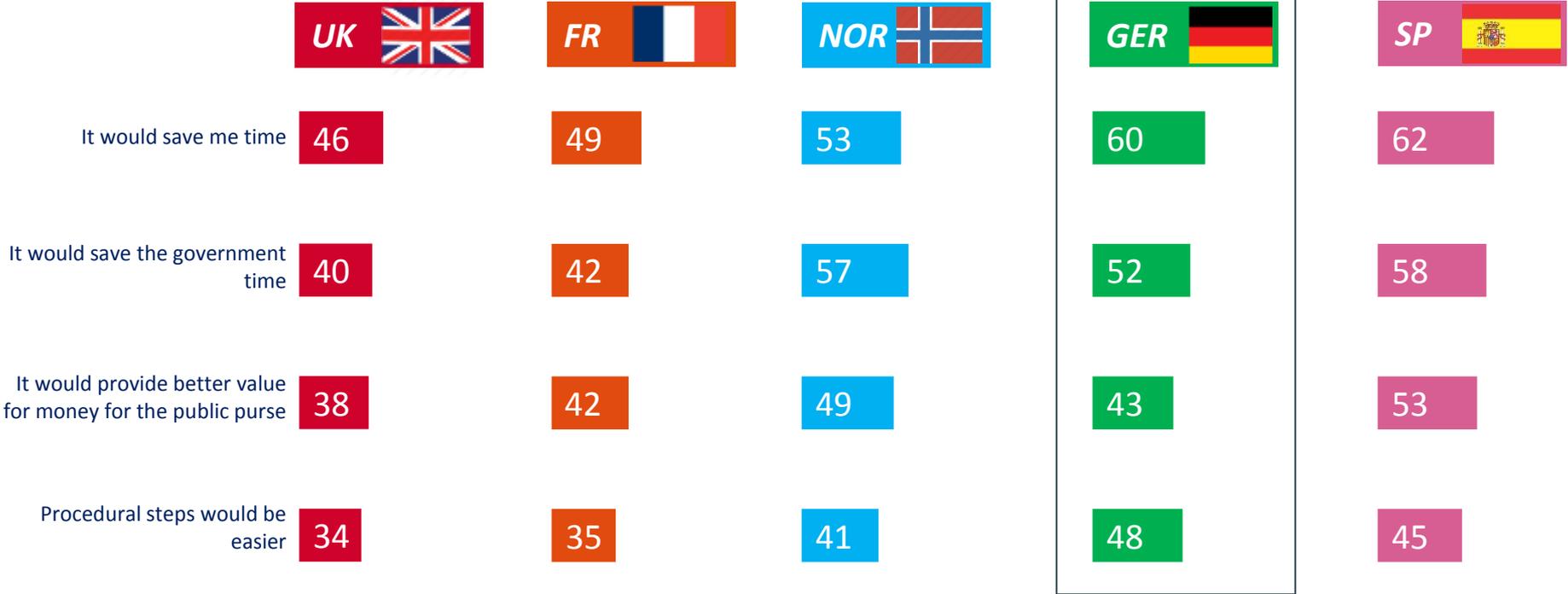


Question : If new digital public services were developed:



PROS OF DIGITAL PUBLIC SERVICES

STRONGLY AGREE, IN %



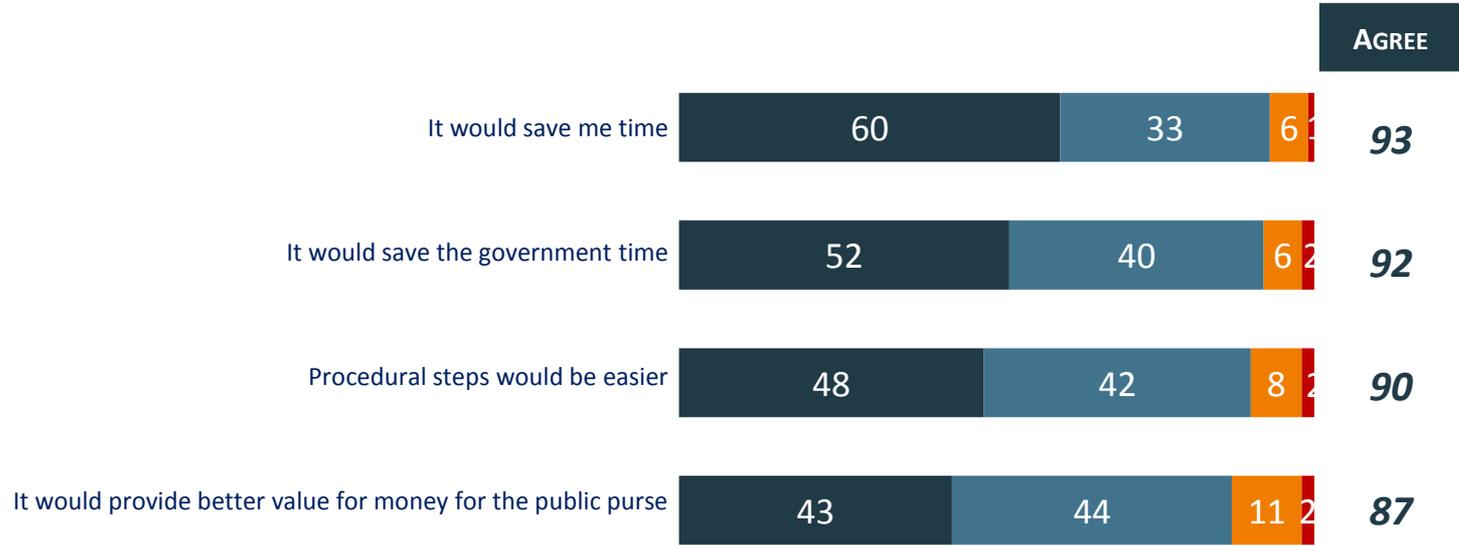
Question : If new digital public services were developed:





ZOOM GERMANY | DETAIL

IN %



STRONGLY AGREE SOMEWHAT AGREE SOMEWHAT DISAGREE STRONGLY DISAGREE



Question : If new digital public services were developed:



CONS OF DIGITAL PUBLIC SERVICES

SUBTOTAL AGREE, IN %



I'm concerned that someone else will access the data I'm entering

79

71

65

67

64

I'm concerned that my data will be used in ways that are counter to my personal interests

78

71

58

60

63

Once I've finished, I'm concerned that I won't be able to re-access my file (to modify my data, etc.)

67

58

62

50

66

I'm concerned that I won't have access to support/assistance

64

66

55

58

68

I prefer having direct contact with administrative and state representatives

61

52

54

47

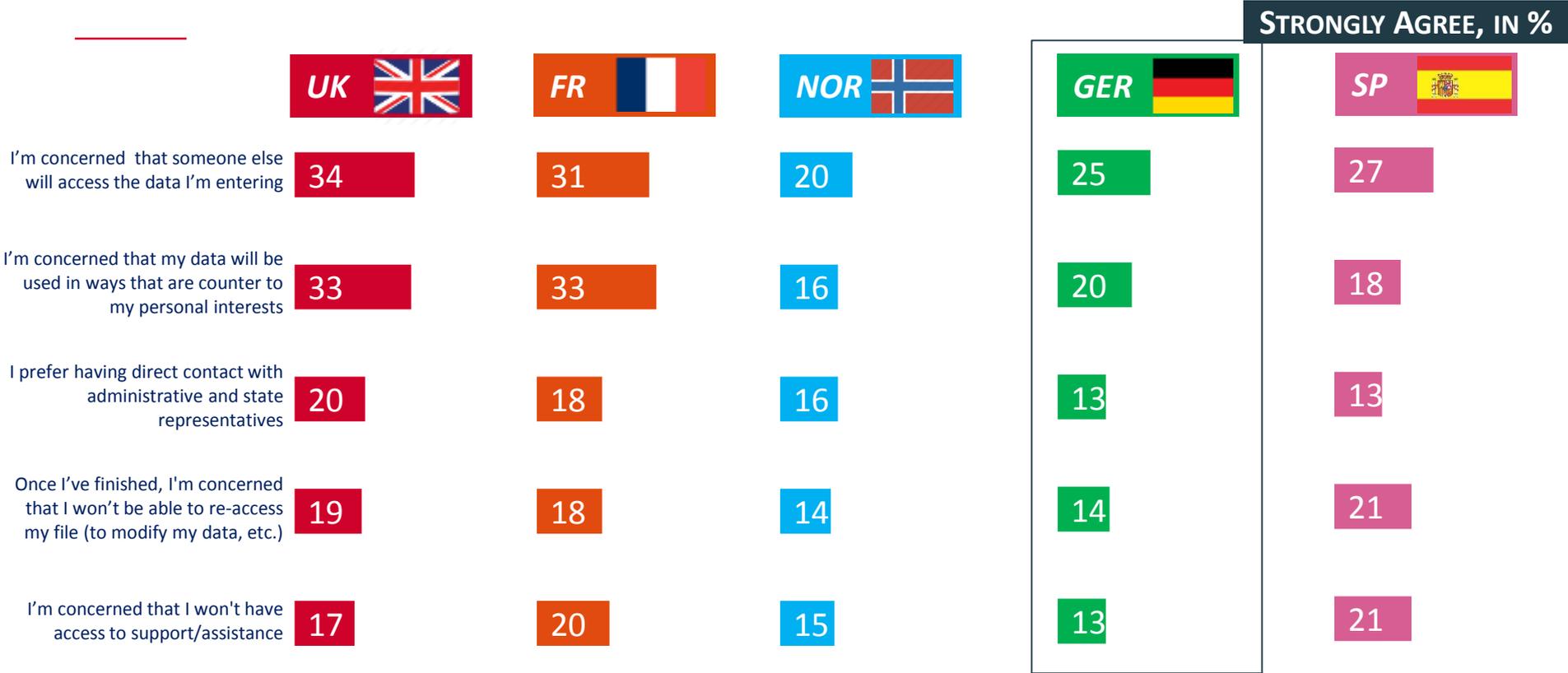
52



Question : With respect to digital public services, do you agree or disagree with the following statements?



CONS OF DIGITAL PUBLIC SERVICES



Question : With respect to digital public services, do you agree or disagree with the following statements?





ZOOM GERMANY | DETAIL

IN %

AGREE

I'm concerned that someone else will access the data I'm entering



67

I'm concerned that my data will be used in ways that are counter to my personal interests



60

I'm concerned that I won't have access to support/assistance



58

'Once I've finished, I'm concerned that I won't be able to re-access my file (to modify my data, etc.)'



50

I prefer having direct contact with administrative and state representatives



47

STRONGLY AGREE

SOMEWHAT AGREE

SOMEWHAT DISAGREE

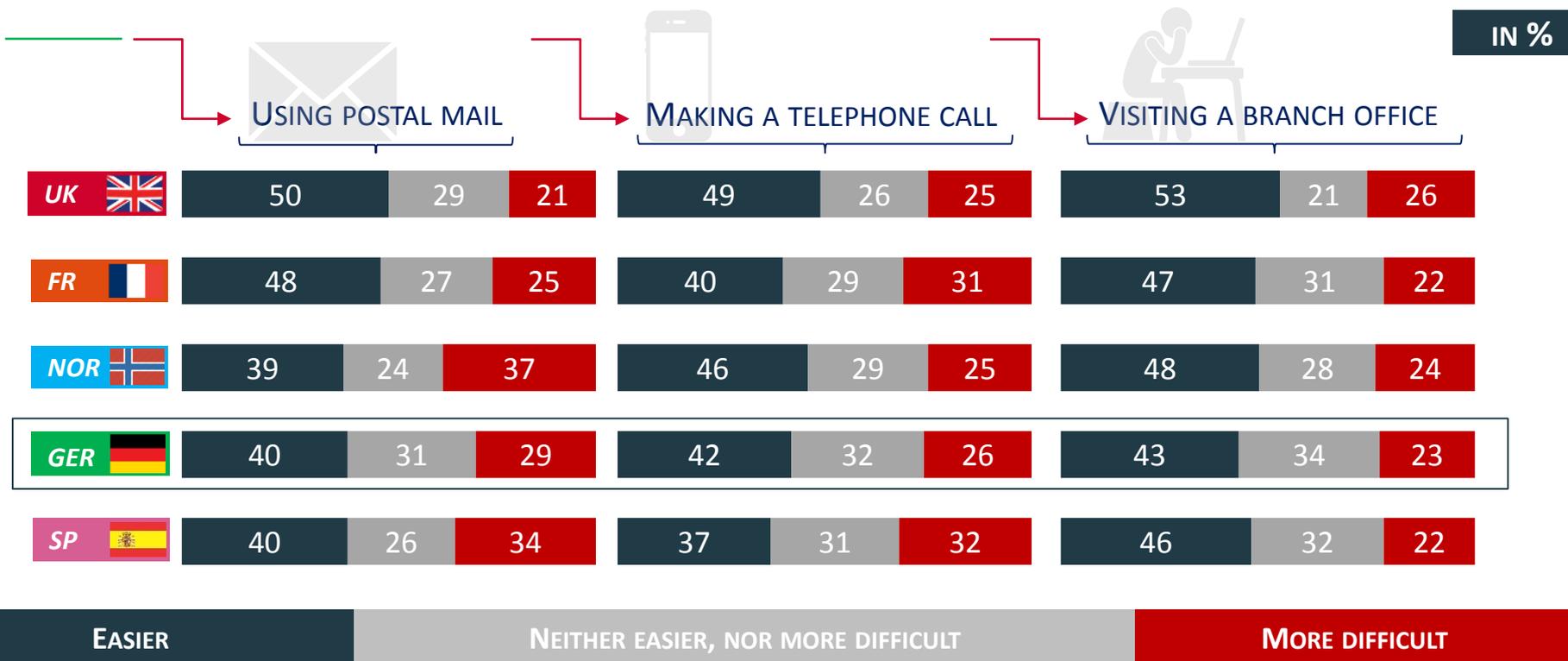
STRONGLY DISAGREE



Question : With respect to digital public services, do you agree or disagree with the following statements?



COMPARISON BETWEEN DIFFERENT WAYS OF ACCESSING PUBLIC SERVICES

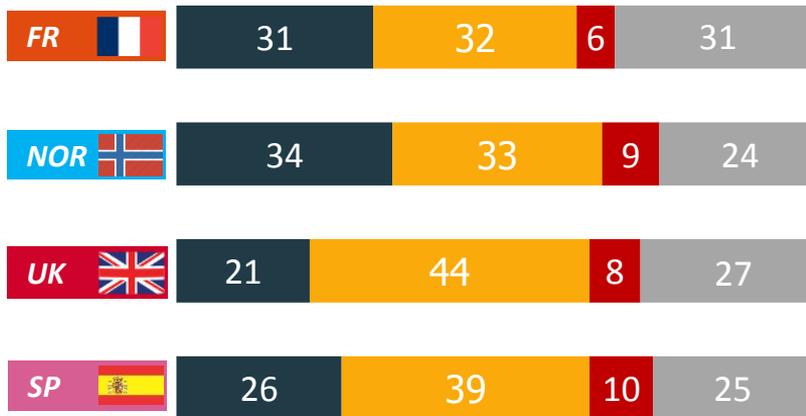
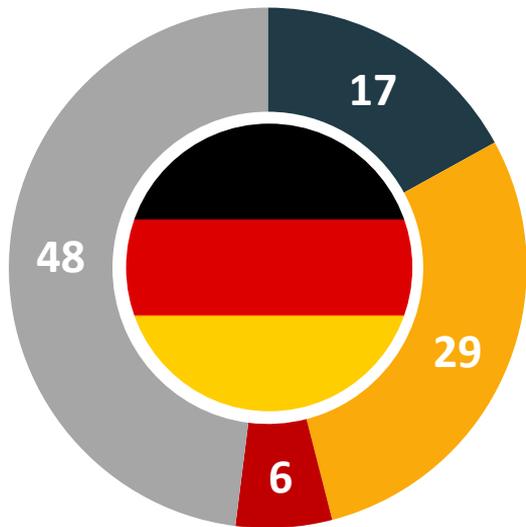


Question : Overall, is it easier, more difficult, or neither easier nor more difficult for you to access public services online as opposed to...



PERCEPTION OF HOW MANY SERVICES ONE DID THE PREVIOUS YEAR

IN %



MORE ADMINISTRATIVE SERVICES

JUST AS MANY ADMINISTRATIVE SERVICES
(NEITHER MORE, NOR LESS)

LESS ADMINISTRATIVE SERVICES

I'VE NEVER ACCESSED ANY ADMINISTRATIVE
SERVICES ONLINE



Question : Would you say that you accessed more, less, or the same number of government services online this year compared to last year ?





ZOOM GERMANY | MORE ADMINISTRATIVE SERVICES 17

IN %

Gender



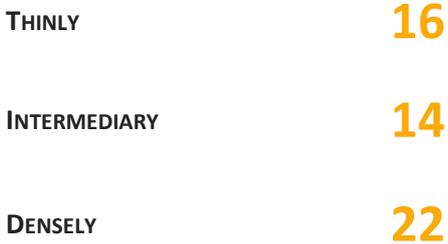
Socio professional category



Age



Population density



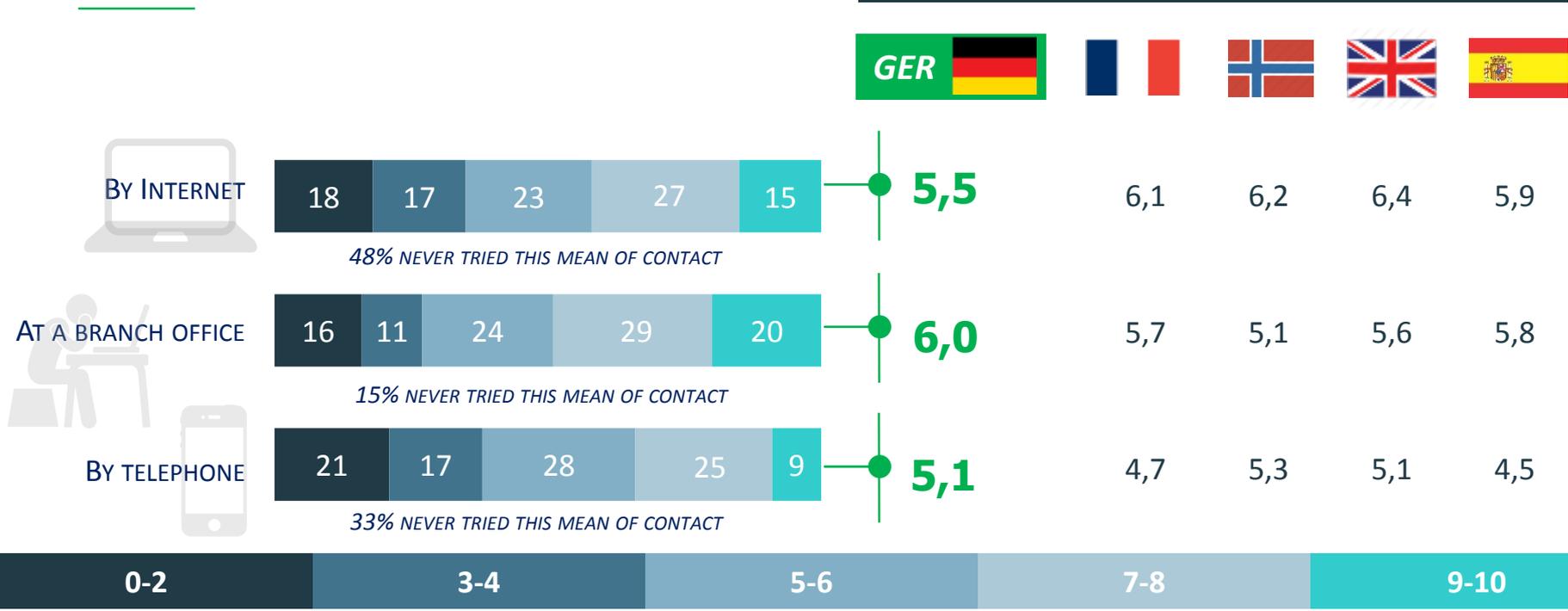
Job status



Question : Would you say that you accessed more, less, or the same number of government services online this year compared to last year ?



EVALUATION OF THE ASSISTANCE PROVIDED WHEN FACING AN ISSUE



NEW Question : (to those who tried to contact public services by this mean) On a scale of 0-10, how would you rate your level of satisfaction with the assistance provided by telephone, at a branch office, or online when you've contacted public services for a question or problem? 0 means that you were not at all satisfied and 10 means that you were very satisfied. The scores in between may be used to express your opinion more precisely.

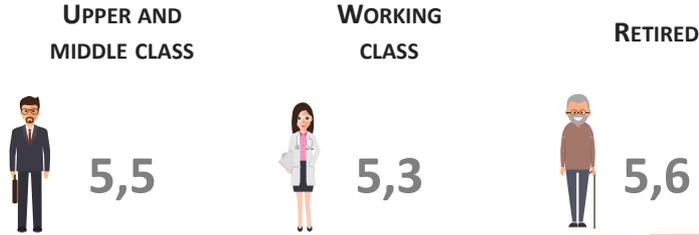




ZOOM GERMANY | AVERAGE, BY INTERNET : 5,5

Gender

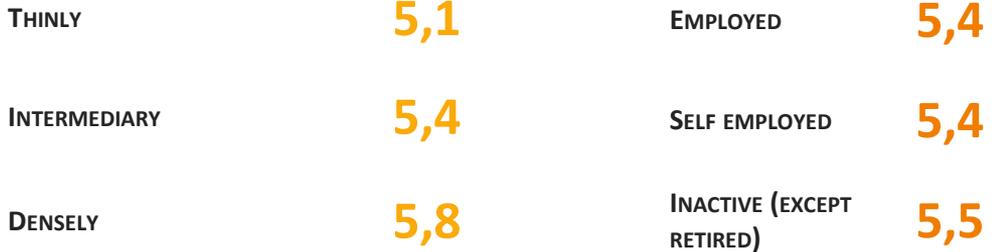
Socio professional category



Age

Population density

Job status



Question : (to those who tried to contact public services by this mean) On a scale of 0-10, how would you rate your level of satisfaction with the assistance provided by telephone, at a branch office, or online when you've contacted public services for a question or problem? 0 means that you were not at all satisfied and 10 means that you were very satisfied. The scores in between may be used to express your opinion more precisely.



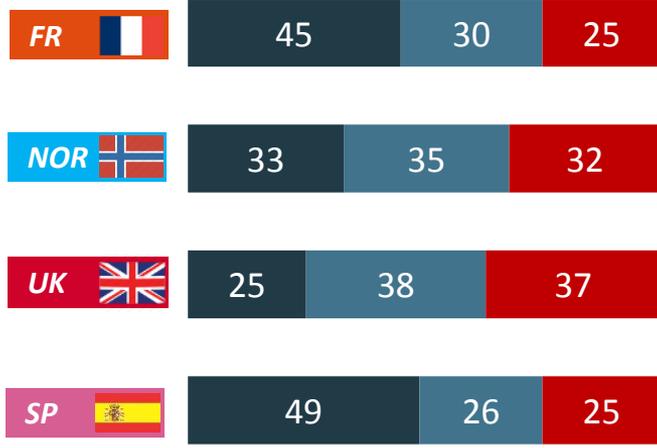
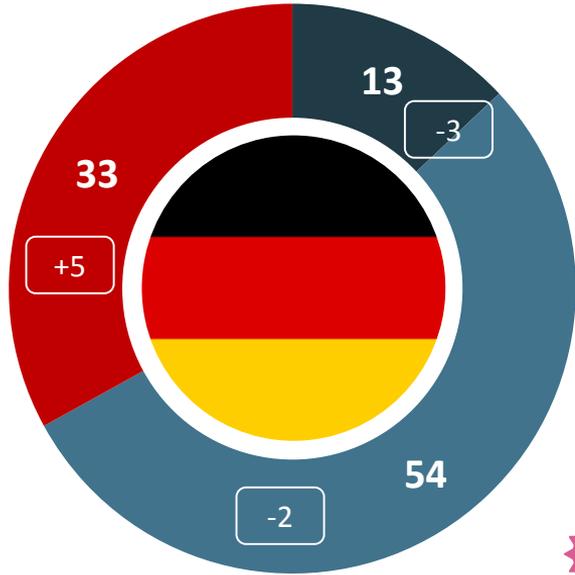


PART 3

**IMPLEMENTATION OF THE DIGITAL TRANSFORMATION BY
THE GOVERNMENT**

THE GOVERNMENTS' WILL AND ABILITY TO DEVELOP ONLINE PUBLIC SERVICES

IN %



EVOLUTION WILL MANAGE TO DO SO	EVOLUTION WON'T REALLY MANAGE TO DO SO	EVOLUTION DOES NOT REALLY HAVE THE WILL TO MAKE PROGRESS
--------------------------------	----------------------------------------	----------------------------------------------------------

-1	-1	+2
+1	-3	+2
-1	-4	+5
-	-	-

... 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 **13** (2017: 16)

IN %

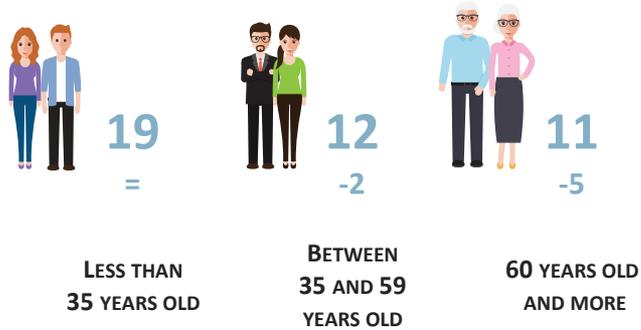
Gender



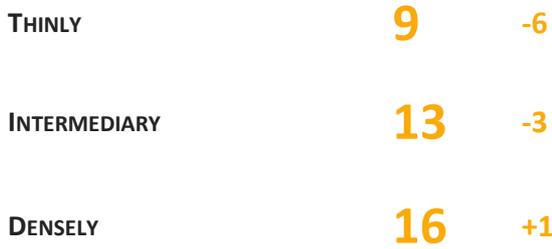
Socio professional category



Age



Population density



Job status

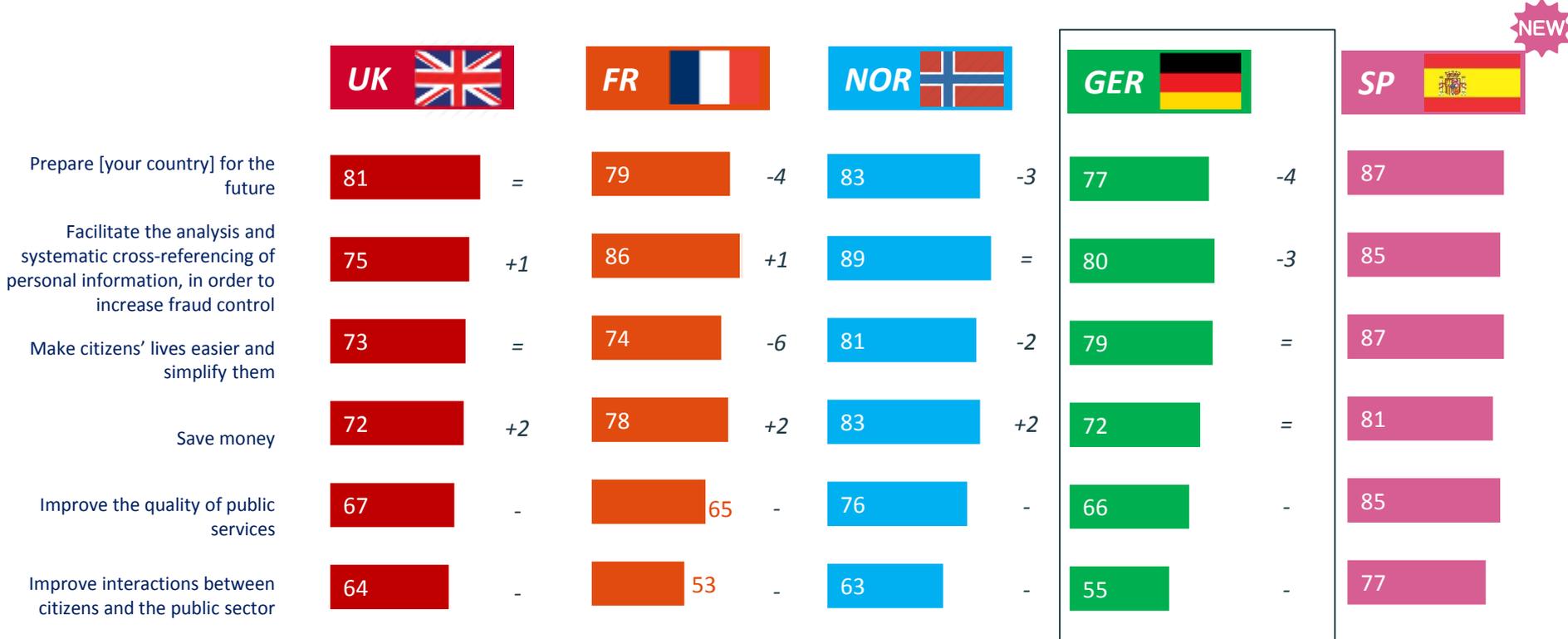


Question : And concerning the development of digital public services, do you feel that the Government...



THE POSITIVE IMPACTS OF THE DEVELOPMENT OF DIGITAL PUBLIC SERVICES

SUBTOTAL YES IN %



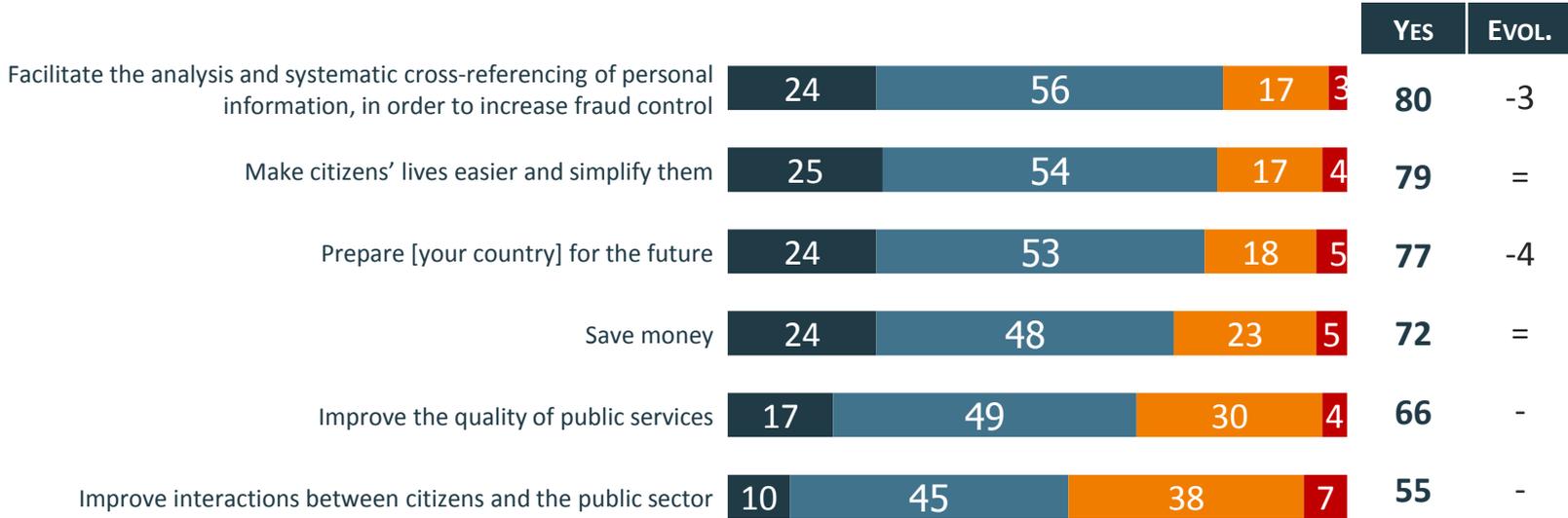
Question : Do you think that the development of digital public services will...





ZOOM GERMANY | DETAIL

IN %



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



THE HUMAN FACTOR IN THE DEVELOPMENT OF DIGITAL PUBLIC SERVICES



SUBTOTAL YES IN %



NEW

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

67

-6

82

=

73

+1

65

-12

67

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

65

+3

86

+5

75

=

80

-5

75

Reduce the number of public jobs

63

-2

83

+9

64

=

52

-4

68

EVOLUTION
2017

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

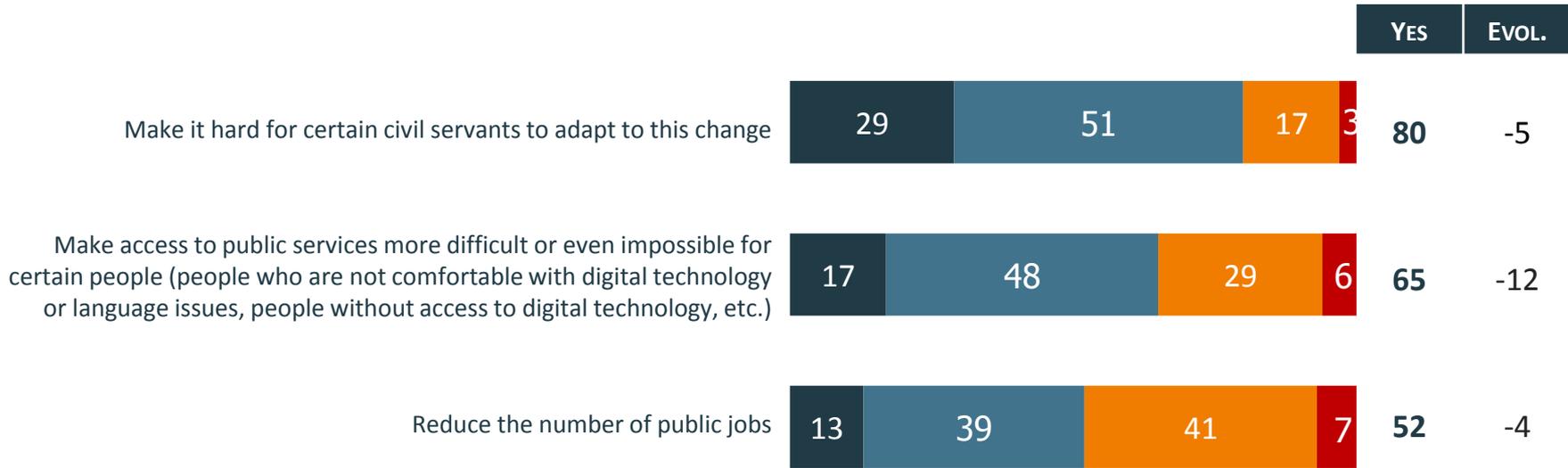
*(people who are not comfortable with digital technology or language issues, people without access to digital technology, etc.)





ZOOM GERMANY | DETAIL

IN %



YES, DEFINITELY
YES, PROBABLY
NO, PROBABLY NOT
NO, DEFINITELY NOT

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.)





PART 4

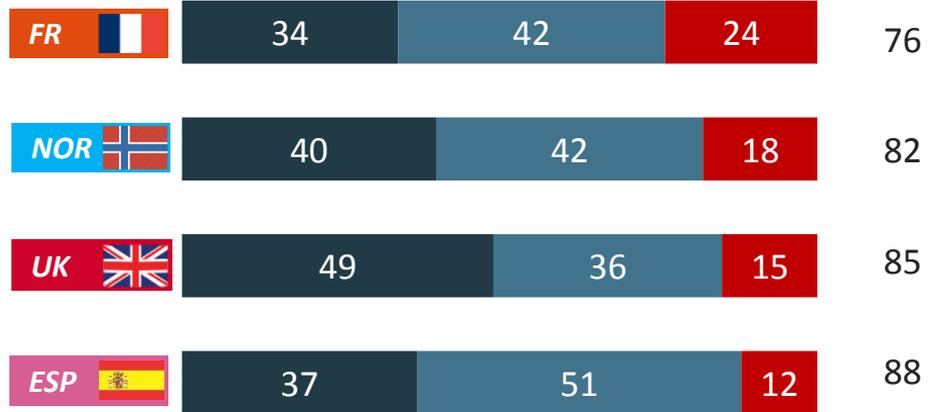
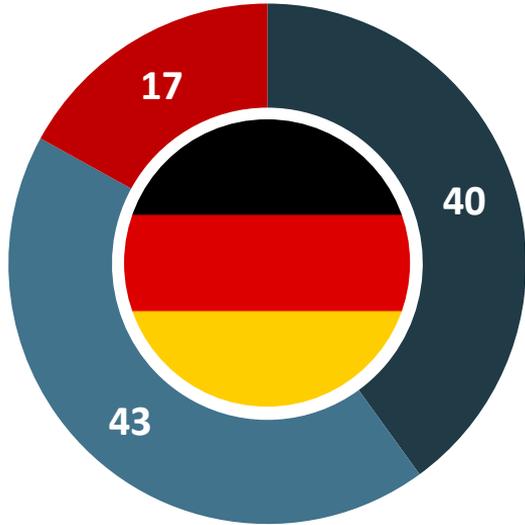
GDPR MODULE



KNOWLEDGE OF THE GDPR

IN %

YES 83



YES

YES, AND I KNOW PRECISELY WHAT IT IS YES, BUT I'M NOT SURE WHAT IT ENTAILS No



Question : Have you heard of the General Data Protection Regulation (GDPR)?





ZOOM GERMANY | SUBTOTAL YES 83

IN %

Gender

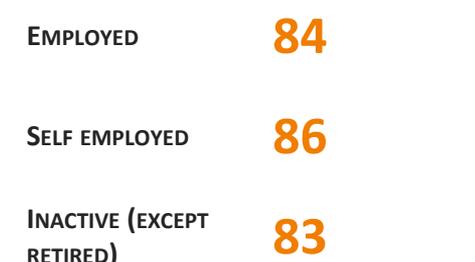
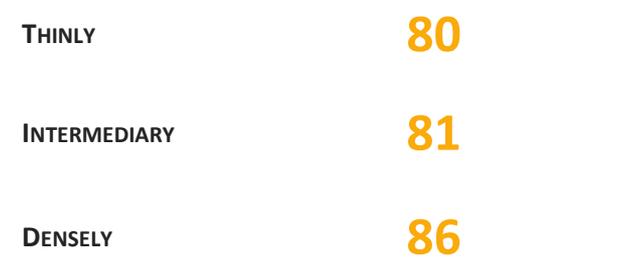
Socio professional category



Age

Population density

Job status

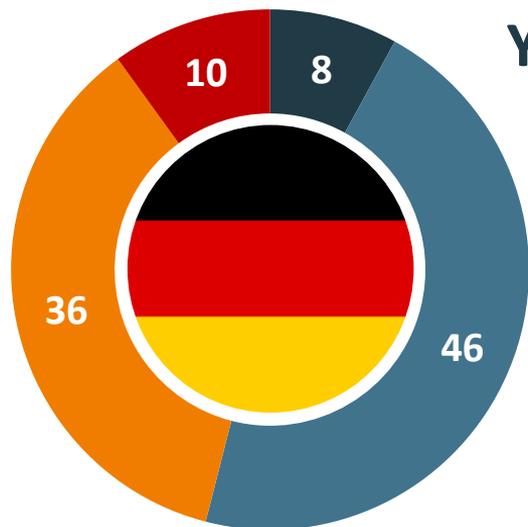


NEW Question : Have you heard of the General Data Protection Regulation (GDPR)?

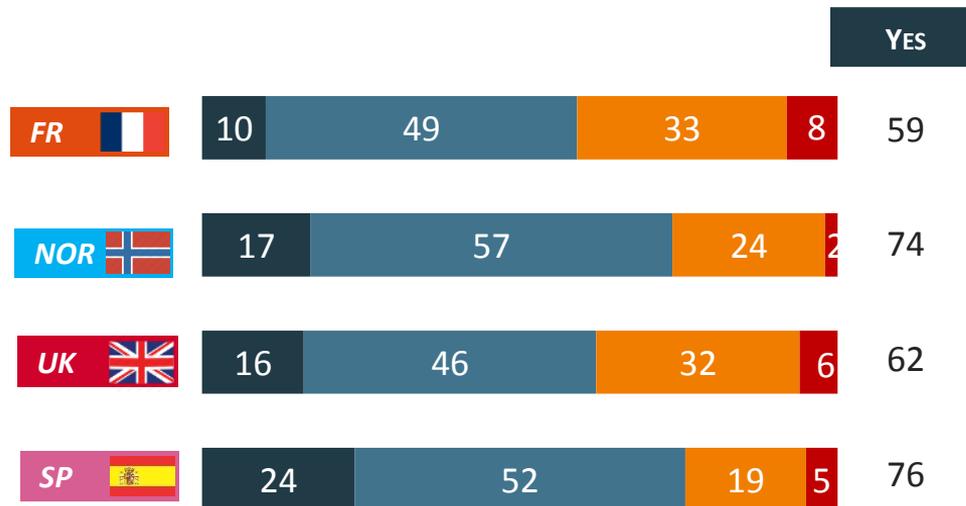


IMPACT OF THE GDPR

... WITH RESPECT TO YOUR RELATIONS WITH PRIVATE COMPANIES, IN %



YES 54



YES, DEFINITELY

YES, PROBABLY

NO, PROBABLY NOT

NO, DEFINITELY NOT



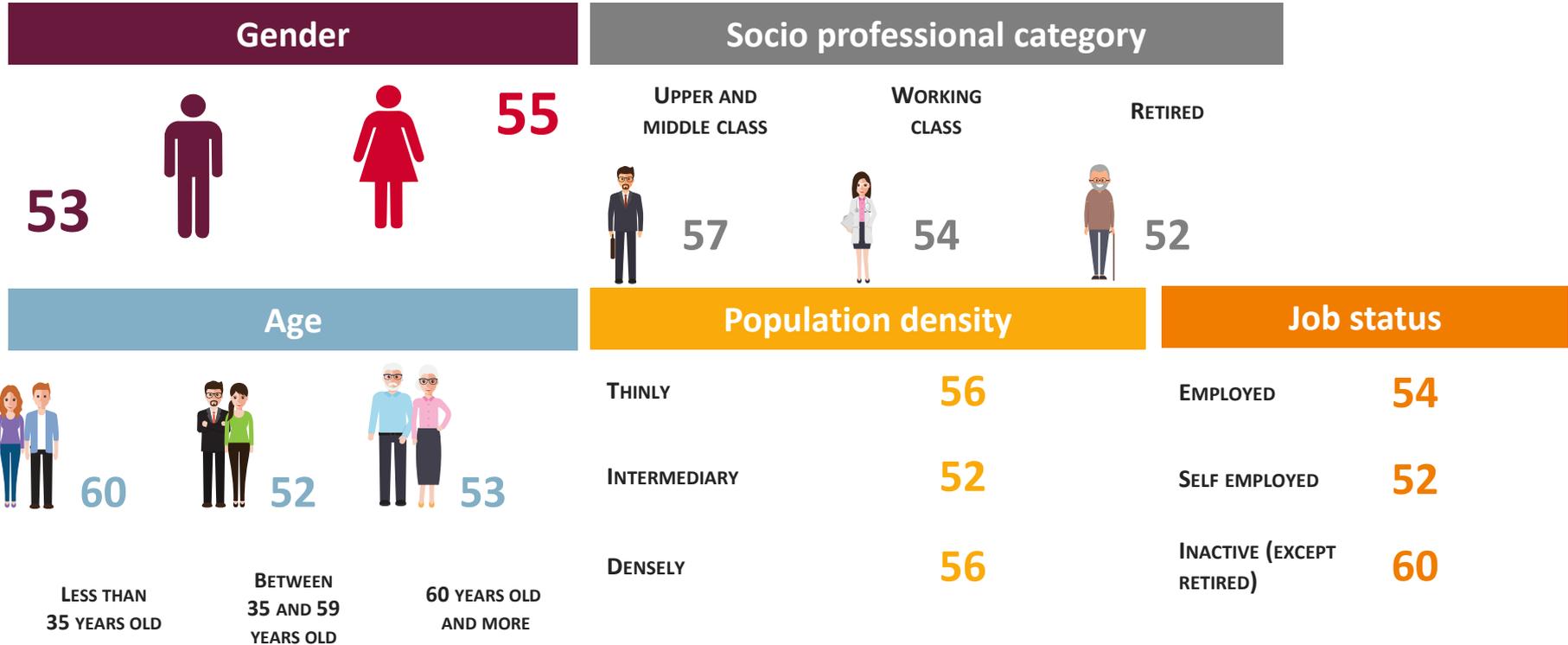
The General Data Protection Regulation is the new European framework for the processing and circulation of personal data. It came into force throughout the European Union on 25 May 2018. Do you believe it will help to better protect your personal data?





ZOOM GERMANY | SUBTOTAL YES 54

... WITH RESPECT TO YOUR RELATIONS WITH PRIVATE COMPANIES, IN %

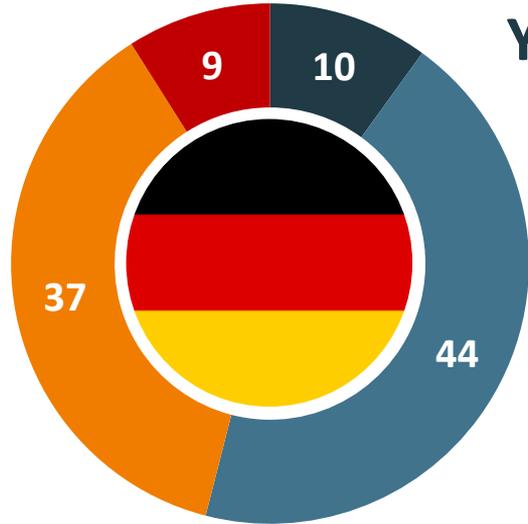


NEW The General Data Protection Regulation is the new European framework for the processing and circulation of personal data. It came into force throughout the European Union on 25 May 2018. Do you believe it will help to better protect your personal data?

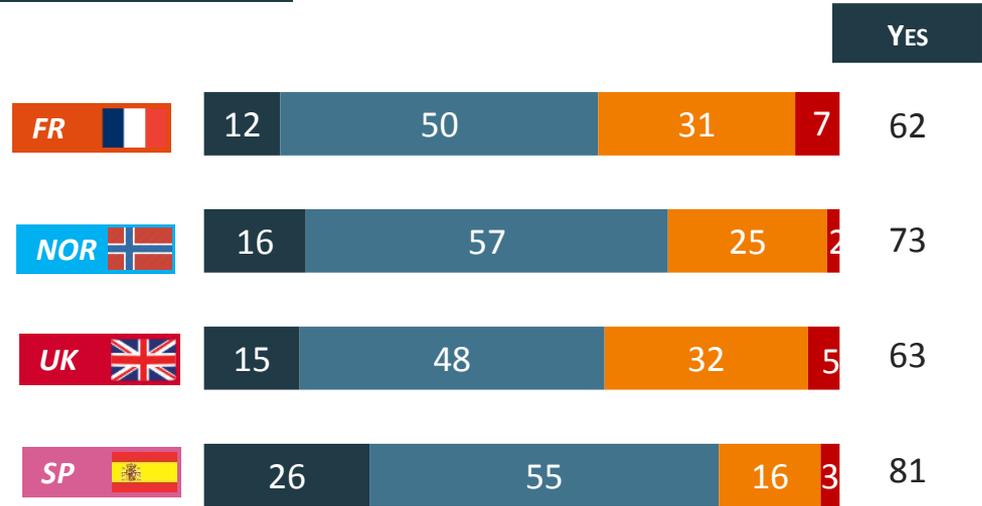


IMPACT OF THE GDPR

... WITH RESPECT TO YOUR RELATIONS WITH THE PUBLIC SECTOR, IN %



YES 54



YES, DEFINITELY

YES, PROBABLY

NO, PROBABLY NOT

NO, DEFINITELY NOT



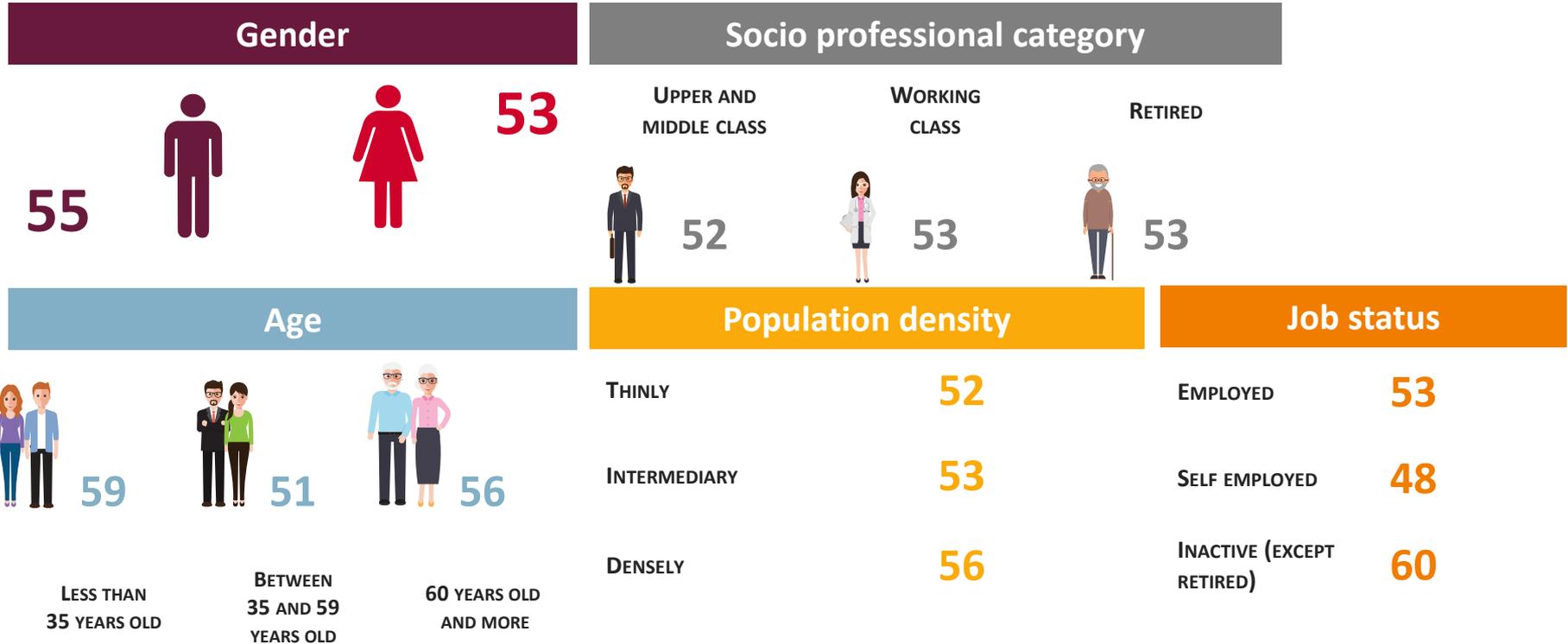
The General Data Protection Regulation is the new European framework for the processing and circulation of personal data. It came into force throughout the European Union on 25 May 2018. Do you believe it will help to better protect your personal data?





ZOOM GERMANY | SUBTOTAL YES 54

... WITH RESPECT TO YOUR RELATIONS WITH THE PUBLIC SECTOR, IN %



NEW The General Data Protection Regulation is the new European framework for the processing and circulation of personal data. It came into force throughout the European Union on 25 May 2018. Do you believe it will help to better protect your personal data?



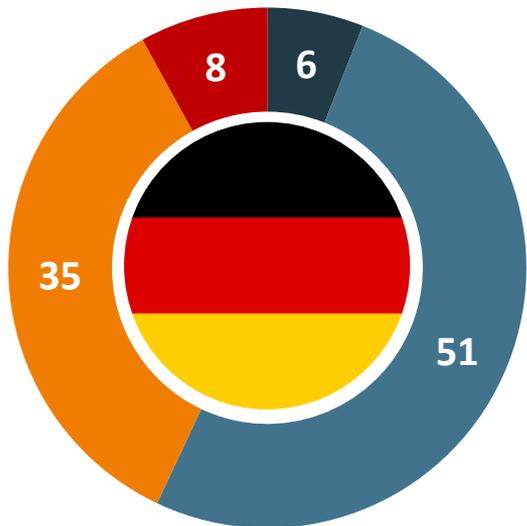
OPINION ON THE PUBLIC AUTHORITIES ABILITY TO ENSURE THE SECURITY OF DIGITAL DATA

TRUST 57

70/57

Results
2017/2016

IN %



	TRUST	2017	2016
FR 	53	70	65
NOR 	74	79	79
UK 	59	71	54
NEW ESP 	59	-	-

ABSOLUTELY

SOMEWHAT

NOT REALLY

NOT AT ALL

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





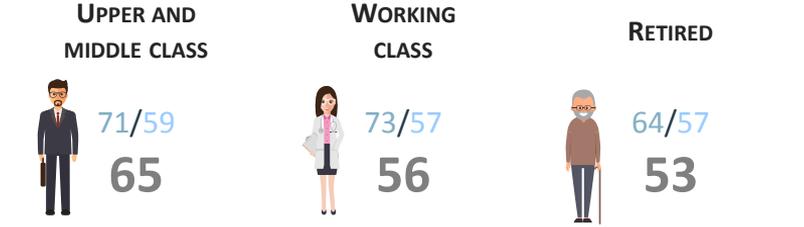
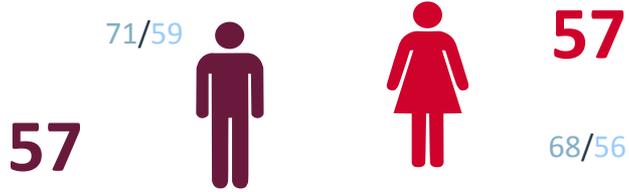
ZOOM GERMANY | SUBTOTAL TRUST 57 (70/57)

IN %

Results
2017/2016

Gender

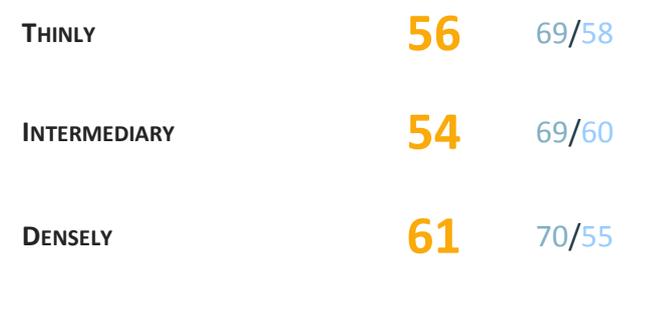
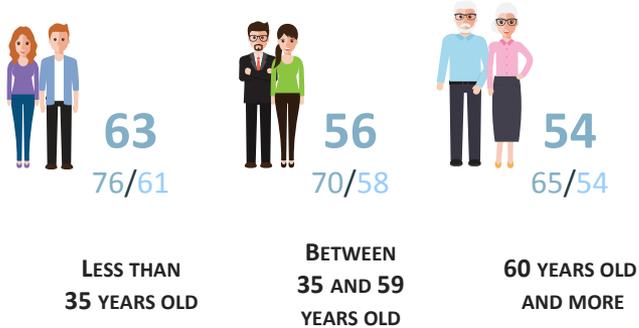
Socio professional category



Age

Population density

Job status



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





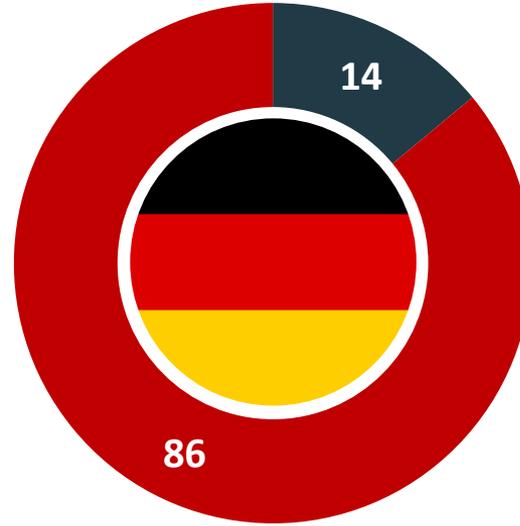
PART 5

SPECIFIC QUESTIONS



KNOWLEDGE OF THE « OZG » LEGISLATION

IN %



JA

NEIN



Question: Seit August 2017 gibt es in Deutschland das „Online Zugangsgesetz“ (OZG), das den Bund, die Länder und die Kommunen gesetzlich dazu verpflichtet, ihre online-fähigen Dienstleistungen elektronisch über Verwaltungsportale anzubieten und diese Verwaltungsportale zu einem Portalverbund zusammenzuschließen. Seit August 2017 gibt es in Deutschland das „Online Zugangsgesetz“ (OZG), das den Bund, die Länder und die Kommunen gesetzlich dazu verpflichtet, ihre online-fähigen Dienstleistungen elektronisch über Verwaltungsportale anzubieten und diese Verwaltungsportale zu einem Portalverbund zusammenzuschließen. **Haben sie von dieser Initiative gehört, insbesondere vom Bundesportal und dem Portalverbund?**





ZOOM GERMANY | JA 14

IN %

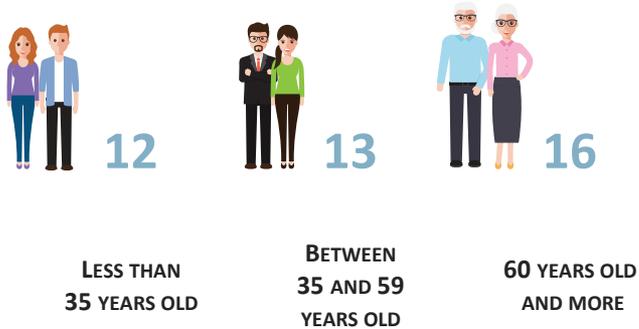
Gender



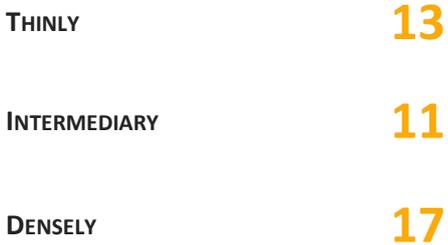
Socio professional category



Age



Population density



Job status



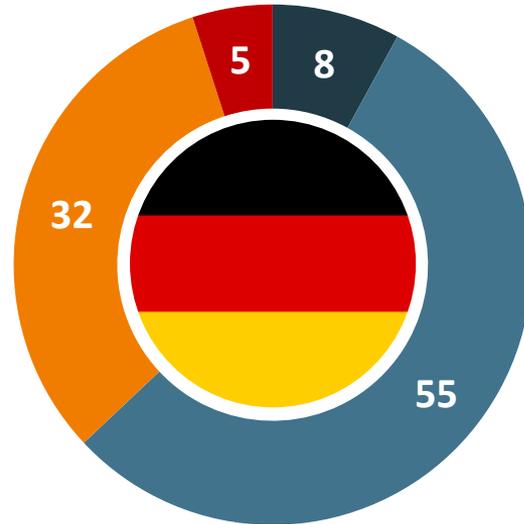
NEW Question: Haben sie von dieser Initiative gehört, insbesondere vom Bundesportal und dem Portalverbund?





IMPACT OF THE « OZG » LEGISLATION

IN %



JA 63

JA, SEHR

EHER JA

NEIN, EHER NICHT

NEIN ÜBERHAUPT NICHT



Question : Glauben Sie, dass das OZG einen signifikanten Beitrag dazu leistet, dass öffentlichen Dienstleistungen online bereitgestellt werden?
(Base : To those who heard of this law)



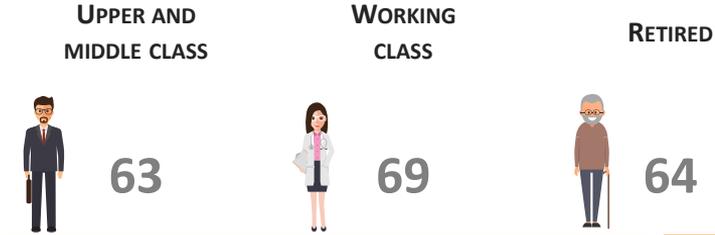


ZOOM GERMANY | SUBTOTAL JA 63

IN %

Gender

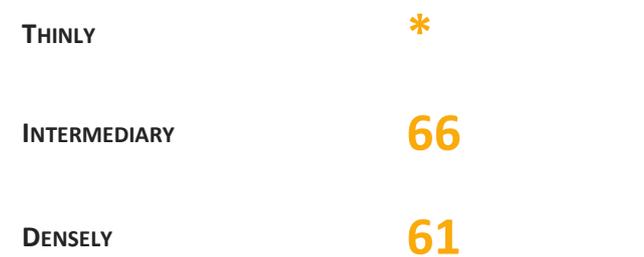
Socio professional category



Age

Population density

Job status



LESS THAN 35 YEARS OLD

BETWEEN 35 AND 59 YEARS OLD

60 YEARS OLD AND MORE



Question : Glauben Sie, dass das OZG einen signifikanten Beitrag dazu leistet, dass öffentlichen Dienstleistungen online bereitgestellt werden? (Base : To those who heard of this law)

*Only variables for which we have sufficient bases are displayed



sopra  steria

Delivering Transformation. Together.

