

e-Estonia international reputation survey

enter
e-estonia

10.06.2021



About us

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GATEWAY
& PARTNERS

Gateway & Partners is an export consulting company that provides market research solutions, export partner attraction and international business consulting.

NORD DDB°
RIGA

NORD DDB Riga is one of the most respected, award-winning advertising agencies in Latvia. Specialises in brand strategy.



Krista Lipinska

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overview of study

by
Krista Lipinska, Gateway & Partners

research aim

To evaluate Estonia's international reputation in the e-government field by exploring the awareness and perception of the e-Estonia brand image and the key underlying e-government solutions among the target audience.



research methodology

Research period

15 June 2020 – 14 June 2021

Data sources

- + *Ex ante* and *ex post* web-surveys, 407 respondents
- + In-depth interviews with 30 high-level digitalisation experts
- + Other secondary data

Main research questions

- + Is Estonia internationally perceived as a digitally advanced country?
- + How is the e-Estonia brand perceived by the international community and how competitive is it?
- + Does the e-Estonia brand (and in particular the e-Estonia Briefing Centre) encourage taking action?
- + How open are other countries to cooperating with Estonian companies?

Activities carried out Analysis of *ex ante* and *ex post* survey

- + Analysis of expert interviews
- + Evaluation of e-Estonia image and reputation
- + Development of International e-Estonia Reputation Index (e-ERI)

research limitations

- + The research was conducted during the Covid-19 pandemic - no physical visits to e-EBC
- + Limited representativity - 98 countries represented
- + Survey sampling and biased answers - prearranged visitors
- + Sector-specific answers – related to specific topics of Digital Discussions
- + Data skewness - uneven distribution of the number of respondents within country and sector (public, private, media)



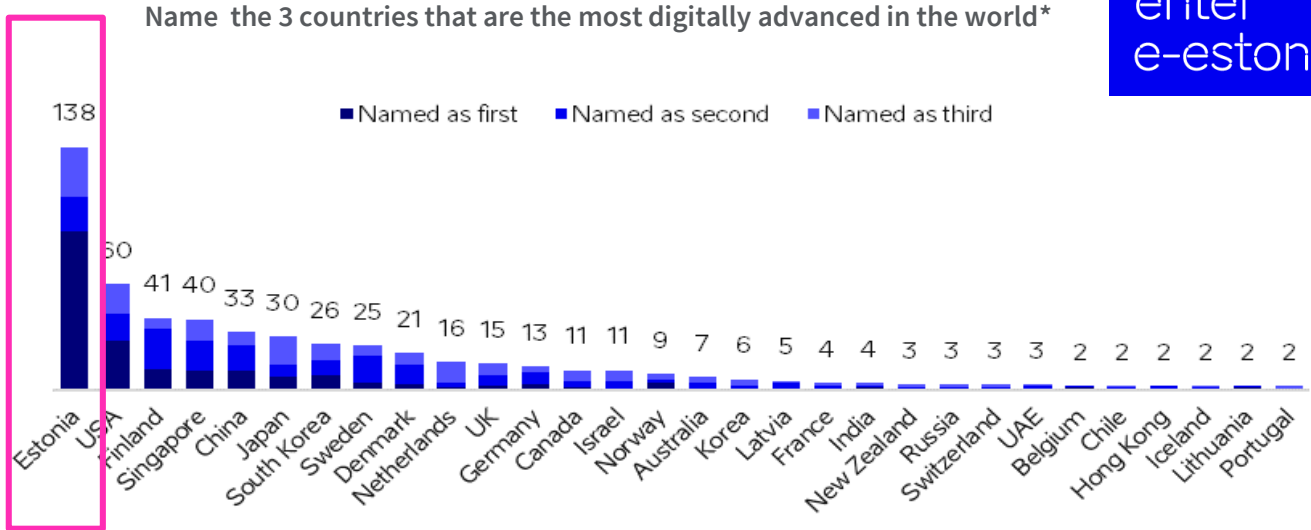
perception of Estonia
as a digitally
advanced country

Estonia is named the most digitally advanced country in the world

48%
of web survey
respondents named
Estonia the most
digitally advanced
country in the world

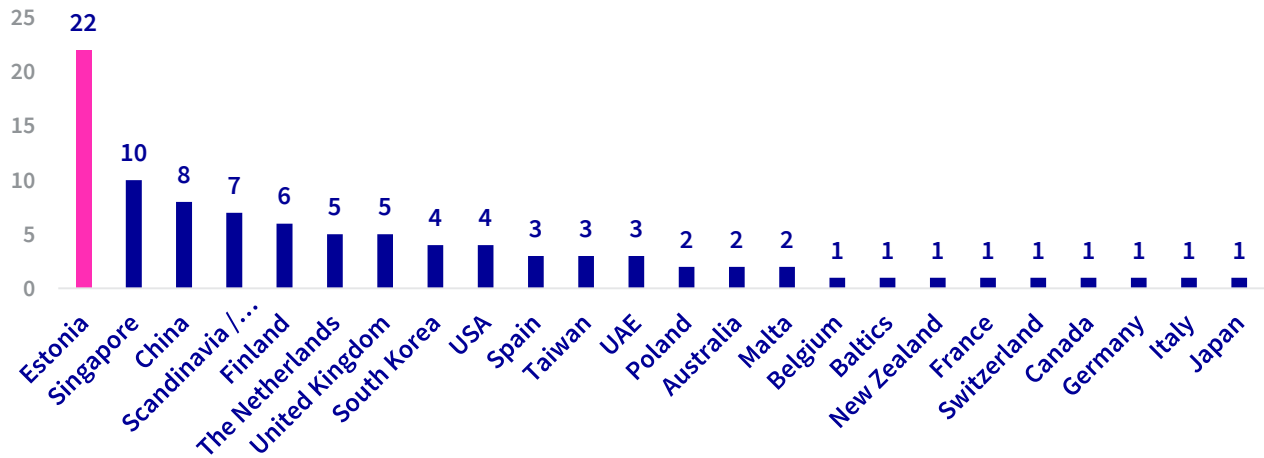
70%
mentioned Estonia
among the
TOP 3
countries

73%
of experts
rank Estonia as
the most digitally
advanced country



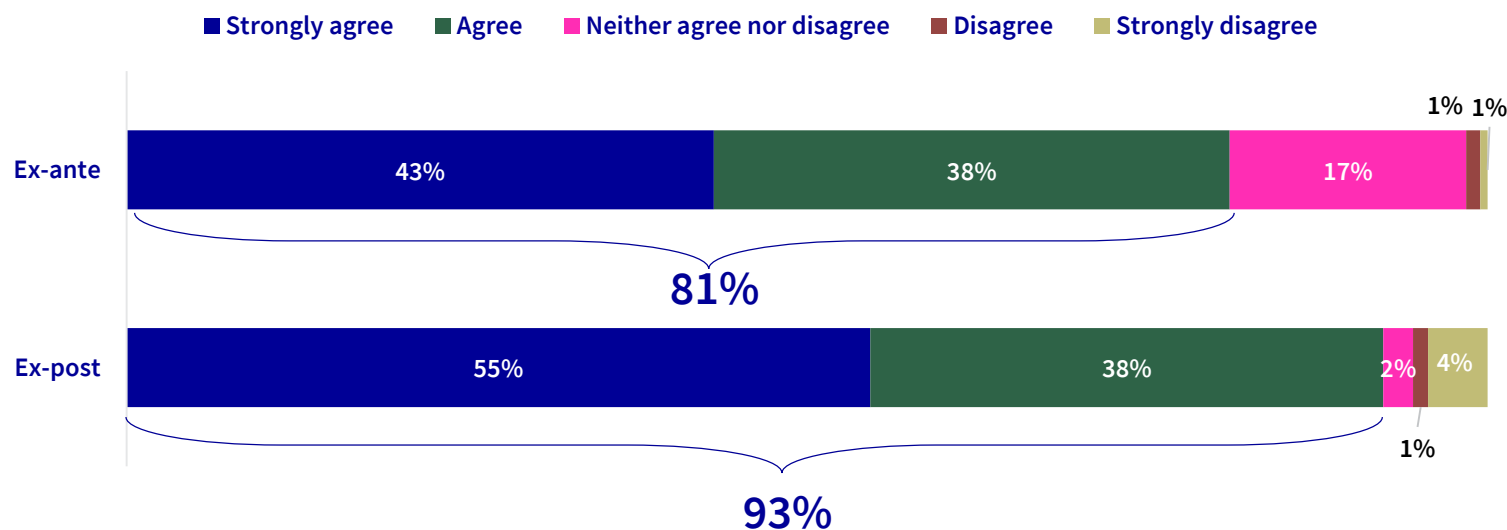
SOURCE: e-Estonia *ex ante* respondents

*Countries that were mentioned only once are not included in the summary graph



SOURCE: Digitalisation expert interviews

Estonia is seen as an international leader in digitalisation



SOURCE: e-Estonia *ex ante* and *ex post* respondents

81%

of respondents before the presentation agreed that Estonia is an international leader in digitalisation,

after the presentation –

93%

No significant difference between the target groups

Difference between regions

Strongly agree

- 68% Middle East and Africa
- 52% in Europe and Central Asia
- 45% in the Southeast Asia and the Pacific

Ex post answers



EX POST SURVEY

More tech-related associations
Fewer other types of associations

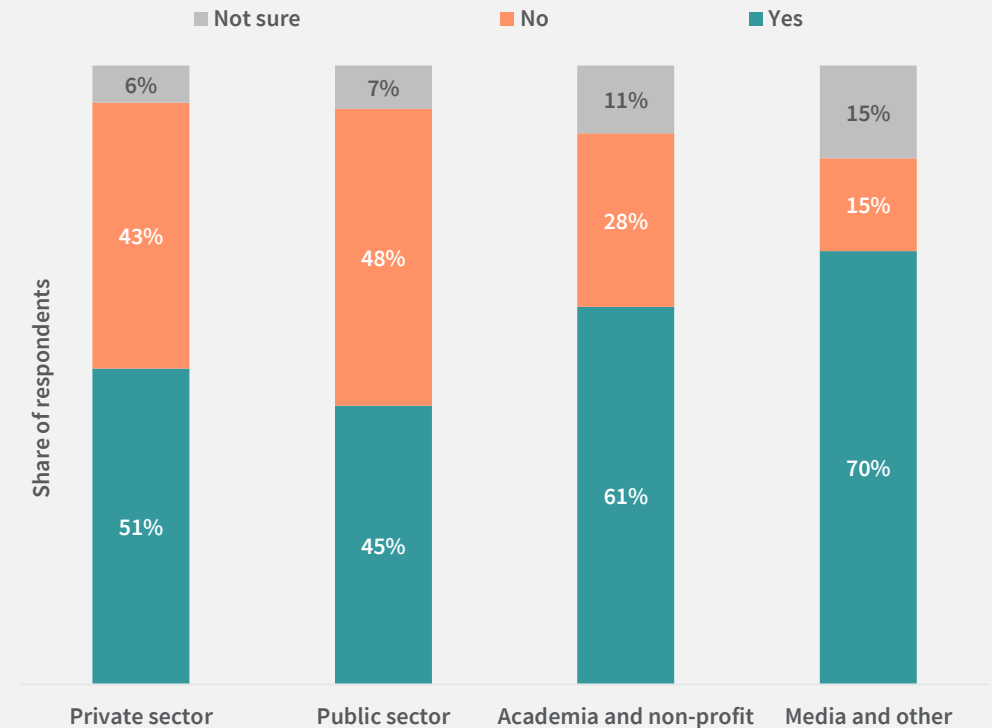
knowledge and
reputation of the e-
Estonia brand

awareness of the e-estonia brand

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Q – HAVE YOU HEARD ABOUT THE E-ESTONIA BRAND?

EX ANTE SURVEY



51%

of survey respondents and 80% of the digitalisation experts had heard about the e-Estonia brand

93%

of survey respondents who are familiar with the brand, feel positive about it

80%

of survey respondents who are familiar with the brand, believe it is unique

“I think the **e-Estonia brand is massive**, especially for a small country with very small resources and a very small population.

Just the fact that people like friends of mine from America move to Estonia or at least create a company there shows how big the brand is. I have huge respect for that.”

Dinis Guarda, Founder & CEO at Ztudium

“**Fantastic, very good impression.** I have been considering opening a second business with an Estonian residency.”

Joao Bocas, CEO, Digital Saludem

“If someone woke me up in the middle of the night and said, ‘I want to go to one place to look at how they're using digital technologies in the public sector’, I would suggest going to Estonia.”

Magnus Mahring, Professor of Entrepreneurship and Digital Innovation, Stockholm School of Economics

“I like that Estonia has all the good fundamental building blocks in place for attracting and absorbing talent. At the same time, you do not want to lose the native culture, you want to kind of bring in people and assimilate them into the culture that exists.”

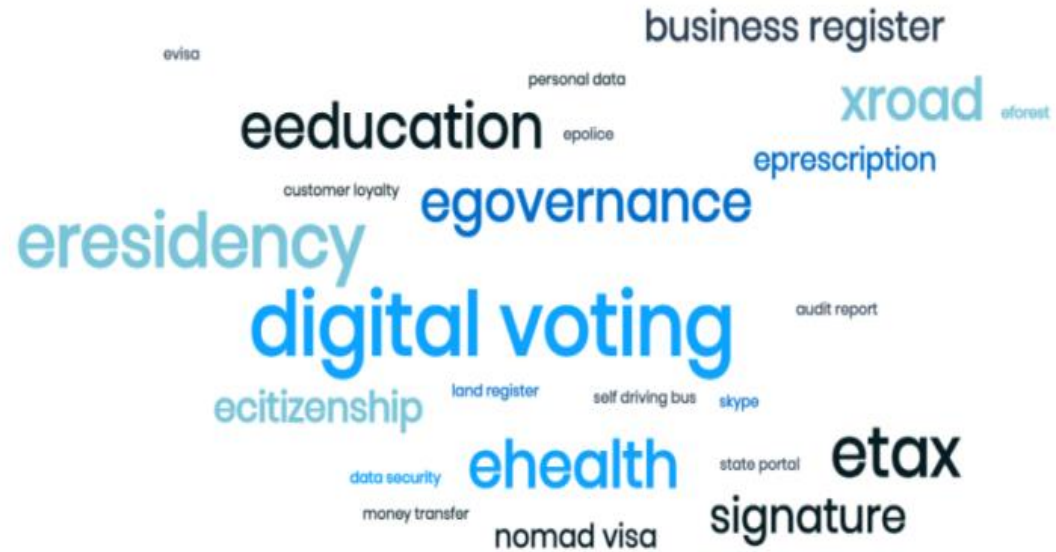
Steven Brady, Chief Technology Officer, The Barnes Foundation

the most well-known Estonian tech-companies and e-services



TOP

Skype, Bolt/Taxify, Cybernetica, Nortal, Transferwise



TOP

Digital voting, digital ID, e-Residency

Communication channels

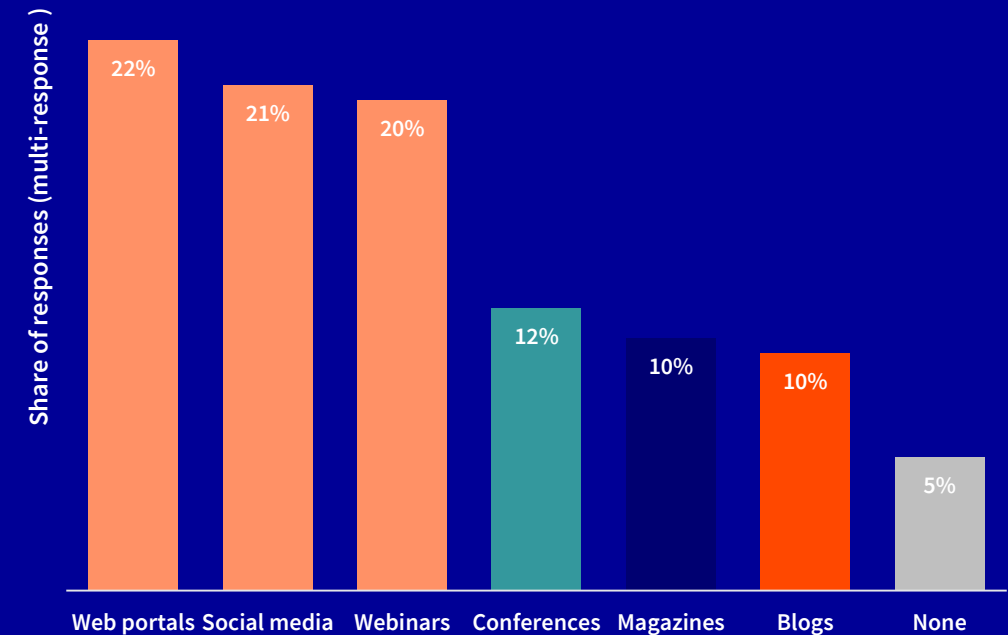
Social media ([LinkedIn](#), [YouTube](#), [Facebook](#)), web-portals and webinars are the top information channels on digitalisation.

Specific blogs, industry conferences and magazines ([MIT Technology Review](#), [Harvard Business Review](#) and [Wired](#)), on average are used significantly less – they are more relevant for people with higher level of digitalisation knowledge who are looking into specific topics.

enter e-estonia

Q – WHICH INFORMATION CHANNELS DO YOU FOLLOW FOR DIGITALISATION TOPICS?

EX ANTE SURVEY



key areas for improvement

ALTHOUGH THE E-ESTONIA BRAND IS WELL-KNOWN, KNOWLEDGE OF IT IS OFTEN **SUPERFICIAL**



20%

or 6 out of 30 digitalisation experts **had never heard** about the e-Estonia brand



27%

8 out of 30 digitalisation experts said their **knowledge of e-Estonia is poor**



69%

of *ex ante* survey respondents **could not name any Estonian tech companies**



13%

13% of *ex ante* respondents **had cooperated with Estonian businesses or institutions in the tech area**



28%

72% of *ex ante* respondents **had not cooperated with Estonian businesses or institutions at all**

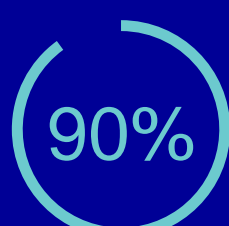
e-Estonia Briefing Centre

evaluation of the e-EBC

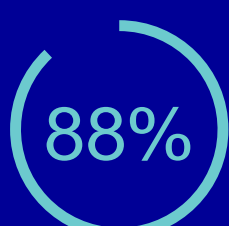
MAJORITY OF PRESENTATION PARTICIPANTS RATED IT AS **EXCELLENT OR VERY GOOD**



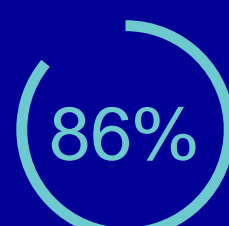
would suggest e-EBC
services to their
colleagues



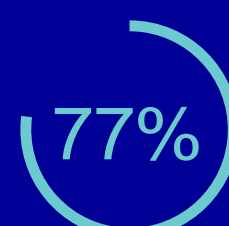
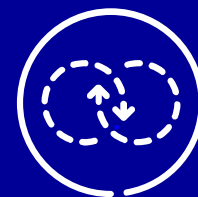
evaluated the
presentation as very
good or excellent, and
the remaining 10% - as
good



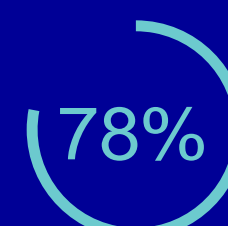
indicated the
presentation
met
their expectations



found the presentation to
be very relevant or
relevant to their
professional area



would be willing
to partner up with an
Estonian ICT company or
write a publication on e-
Estonia



said they will take further
steps – in most cases,
search for further
information or discuss
with colleagues

compliments received

“modern
approach”

“the way
Estonia is
branding
herself is just
amazing”

“great
experience”

“well-spent
time”

“fantastic”

“high-class
discussions, very
professional speakers
and outlook”

openness to
cooperating with
Estonian ICT
companies

openness

“It really depends on the political will and the will to make things more transparent. Implementing e-government solutions and digital transmission takes a charismatic leader. Without one, it’s difficult.”

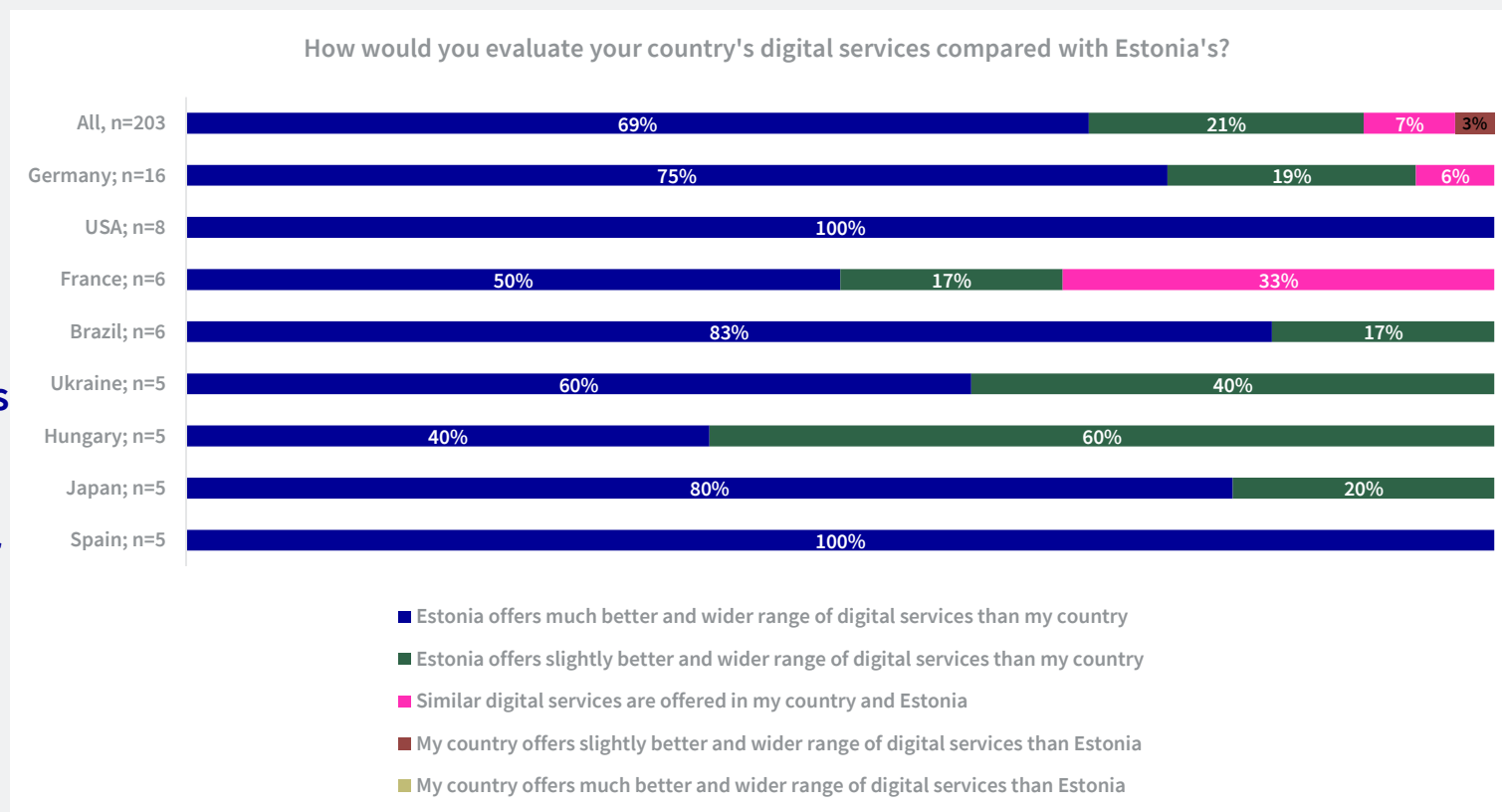
Theo Blackwell, Chief Digital Officer, City of London

Countries are open to cooperating with Estonia

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Among *ex post* respondents:

- + 90% believe that Estonia offers a better and wider range of digital services than their home country
- + 7% believe that their country offers similar or better digital services than Estonia (respondents from Georgia, Singapore and China),
- + Only 3% believe that their country offers better services



SOURCE: e-Estonia *ex post* respondents

most wanted e-services

Which e-services would bring the greatest value to their home country?

- + e-Residency and i-Voting are considered to be the most well-known services
- + e-Tax report, e-Identity and e-Health are mentioned as the most essential ones
- + Many countries already have e-Tax reports, e-ID and e-Signature implemented

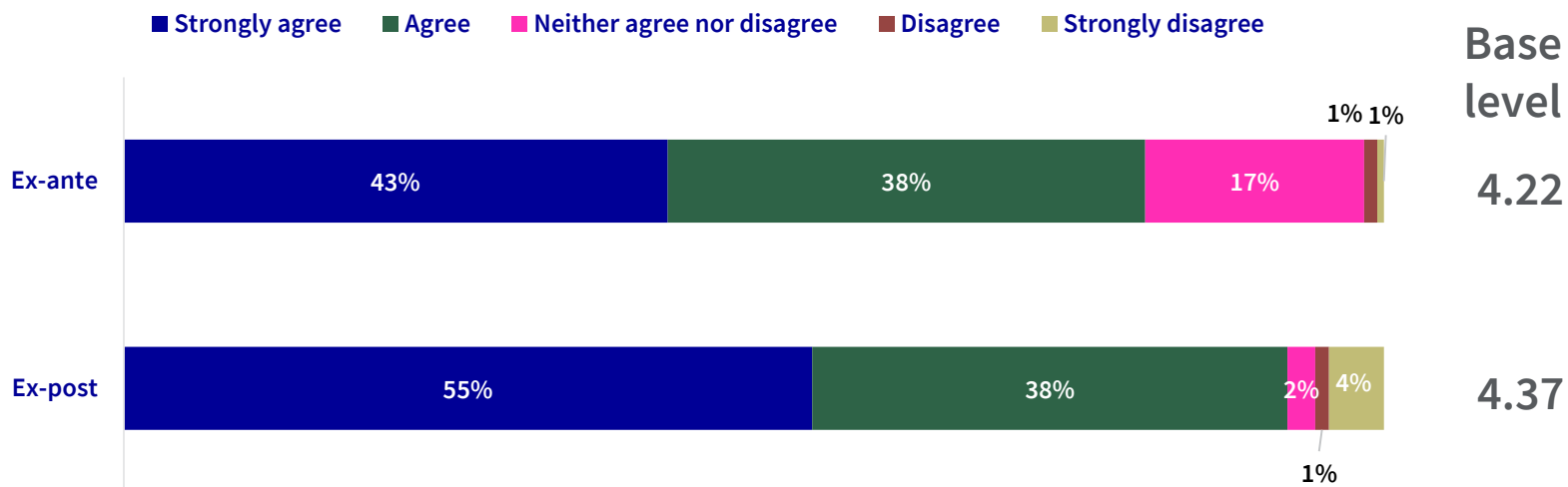


Base evaluation level of e-Estonia image and reputation

by

Zanda Vipule, Gateway & Partners

The main question – *Do you agree that Estonia is an international leader in digitalisation?*



SOURCE: e-Estonia *ex ante* and *ex post* respondents

Simplified base level and key answer from the questionnaire

- Generally excellent evaluation.
- Different respondents for both questionnaires, thus not direct consequences of the presentation
- Not possible to go deeper in country analysis
- *Ex ante*: focus on long-term
- *Ex post*: focus on short-term evaluation of e-Estonia image and reputation

Ex ante base level – long-term evaluation of e-Estonia image and reputation

Indicator abbreviation	Indicator	Assigned weight of indicator
Ex ante I	Trust in Estonia as an international leader in the digitalisation area	50%
Ex ante II	Awareness of Estonian ICT companies	10%
Ex ante III	Awareness of the e-Estonia brand	10%
Ex ante IV	Awareness level of the e-EBC	10%
Ex ante V	Prevalence of general partnership with Estonia	10%
Ex ante VI	Prevalence of partnership with Estonia in the ICT sector or digitalisation area	10%
Ex ante base level evaluation		59.4
Ex ante base level evaluation for countries with more than 3 answers		58.5

SOURCE: e-Estonia *ex ante* respondents.
Methodology – built by authors

Insights of long-term evaluation:

Leadership in digitalisation

- knowledge of Estonian ICT companies
- knowledge of other e-Estonia brands
- previous partnership with Estonia and/or ICT sector

Main image positioning + detailed insights in branding and partnership

Ex post base level – short-term evaluation of e-Estonia image and reputation

Indicator abbreviation	Indicator	Assigned weight of indicator
<i>Ex post</i> I	Trust in Estonia as an international leader in the digitalisation area	50%
<i>Ex post</i> II	Evaluation of the e-EBC presentation	10%
<i>Ex post</i> III	Evaluation of the e-EBC presentation for the professional area	5%
<i>Ex post</i> IV	Recommendation of the e-EBC to colleagues	10%
<i>Ex post</i> V	Impact of the e-EBC presentation on the perception of the ICT level in own country	5%
<i>Ex post</i> VI	Impact of the e-EBC presentation on ICT partnership possibilities	10%
<i>Ex post</i> VII	Impact of the e-EBC presentation on readiness to act	10%
<i>Ex post</i> base level evaluation		81.3
<i>Ex post</i> base level evaluation for countries with more than 3 answers		85.8

SOURCE: e-Estonia *ex post* respondents.
Methodology – built by authors

Insights of short-term evaluation:

Leadership in digitalisation

- evaluation of e-EBC presentation
- recommendation
- readiness to act and create partnerships

e-ERI

the potential countries to
focus on in the future

e-Estonia Reputation Index

TOPICS	Indicator	Data source	Assigned weight	
<u>COOP: COOPERATION WITH ESTONIA IN ICT SECTOR</u>	Import value of ICT services from Estonia in value	WTO database	9	
	Import value of ICT services from Estonia, as % of total import from world	WTO database	8	
	Population	WTO database	30	10
	Prevalence of general partnership with Estonia	<i>Ex ante</i> survey	1	
	Participation in Estonia's e-Residency programme	Estonian e-Residency statistics	2	
<u>DIGI: THE STATE OF DIGITALIZATION</u>	E-government development	UN EGDI (2020)	15	
	Perceived level of ICT sector and e-government development	<i>Ex ante</i> and <i>ex post</i> surveys	1	
	National e-government strategy	WB DGSS (2020)	25	2
	Public data governance policy	WB DGSS (2020)	2	
	Use of government cloud	WB DGSS (2020)	1	
	Government procurement of advanced tech	WEF GITR (2016)	4	
<u>TARGET: HIGH POTENTIAL TARGET MARKETS FOR DIGITAL TRANSFORMATION</u>	Growth potential of e-governance development level in the country	UN EGDI (2020)	10	
	Import value of ICT services	WTO database	25	25
	Weakest areas of e-government development	WB DGSS (2020), TII (2020)	-5	
<u>BRAND: AWARENESS AND PERCEPTIONS OF ESTONIA AND E-ESTONIA</u>	Human resources available for the ICT sector	GitHub data	-5	
	Trust in Estonia as an international leader in digitalisation area	<i>Ex ante</i> survey	5	
	Awareness of Estonian ICT companies	<i>Ex ante</i> , <i>ex post</i> survey	10	1.5
	Awareness of e-Estonia brand	<i>Ex ante</i> survey		2.5
	Interest in e-Estonia, e-Residency and digital citizenship	Google Trends		1
<u>PROMO: IMPACT OF E-ESTONIA PROMOTIONAL ACTIVITIES</u>	Evaluation of e-Estonia Briefing Centre presentation	<i>Ex post</i> survey	1	
	Impact of e-Estonia Briefing Centre presentation on perception of ICT level in own country	<i>Ex post</i> survey	10	5
	Impact of e-Estonia Briefing Centre presentation on ICT partnership possibilities	<i>Ex post</i> survey		2
	Impact of e-Estonia Briefing Centre presentation on readiness to act	<i>Ex post</i> survey		2

5 main areas:

- COOP: Cooperation with Estonia in ICT sector
- DIGI: The state of digitalisation
- TARGET: High potential target markets for digital transformation
- BRAND: awareness and perception of Estonia and e-Estonia
- PROMO: Impact of e-Estonia promotional activities

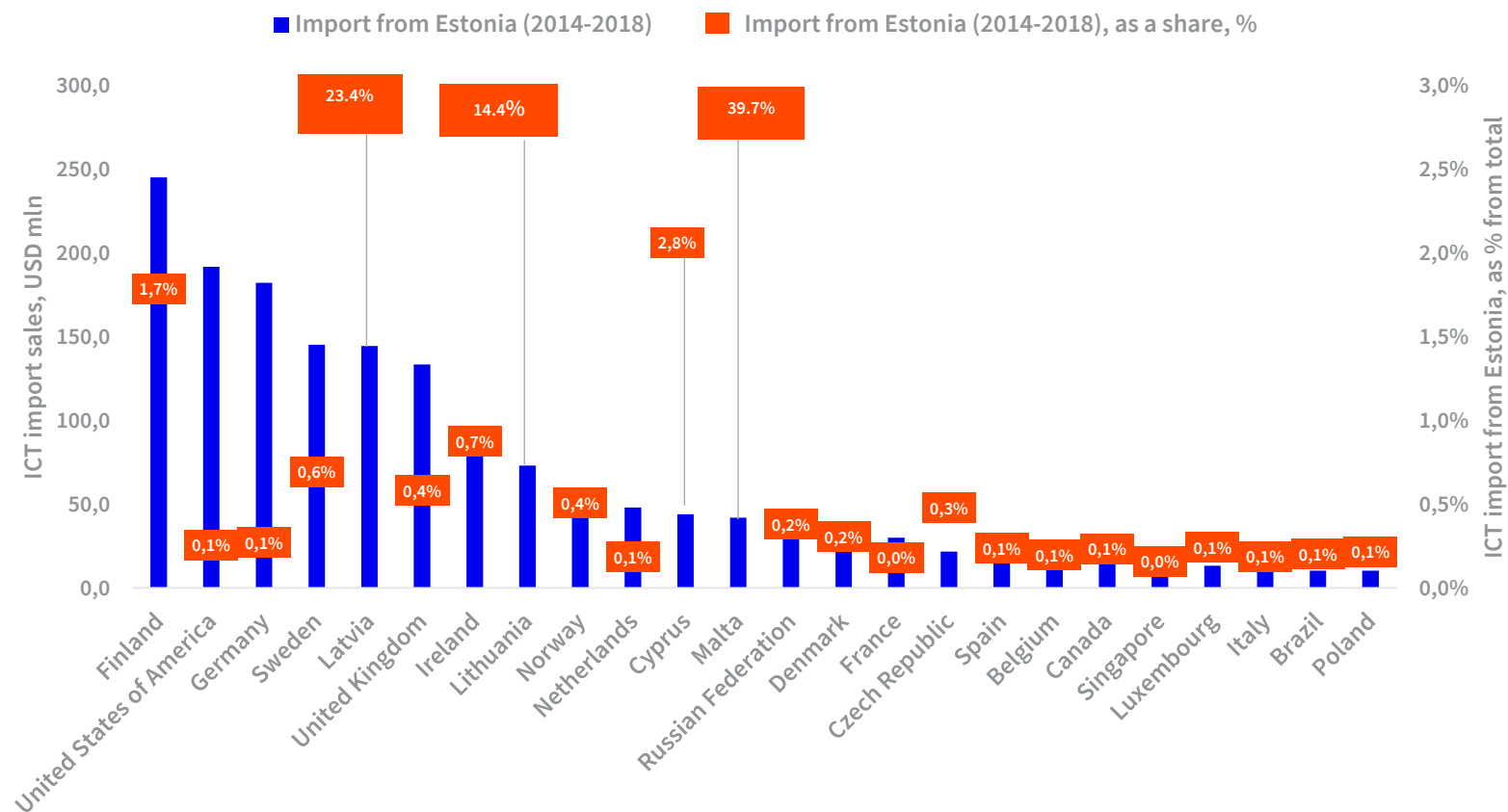
79% of the index based on the statistical data

21% insights from the survey respondents

N.B. The methodology provided is applicable to the given dataset and has been developed for the first time, thus the proportions of the evaluation are subject to change based on the data interpretation and more insights investigating the country situation in detail.

SOURCE: Methodology – built by authors

ICT services import from Estonia in value and as share of ICT imports



SOURCE: WTO database

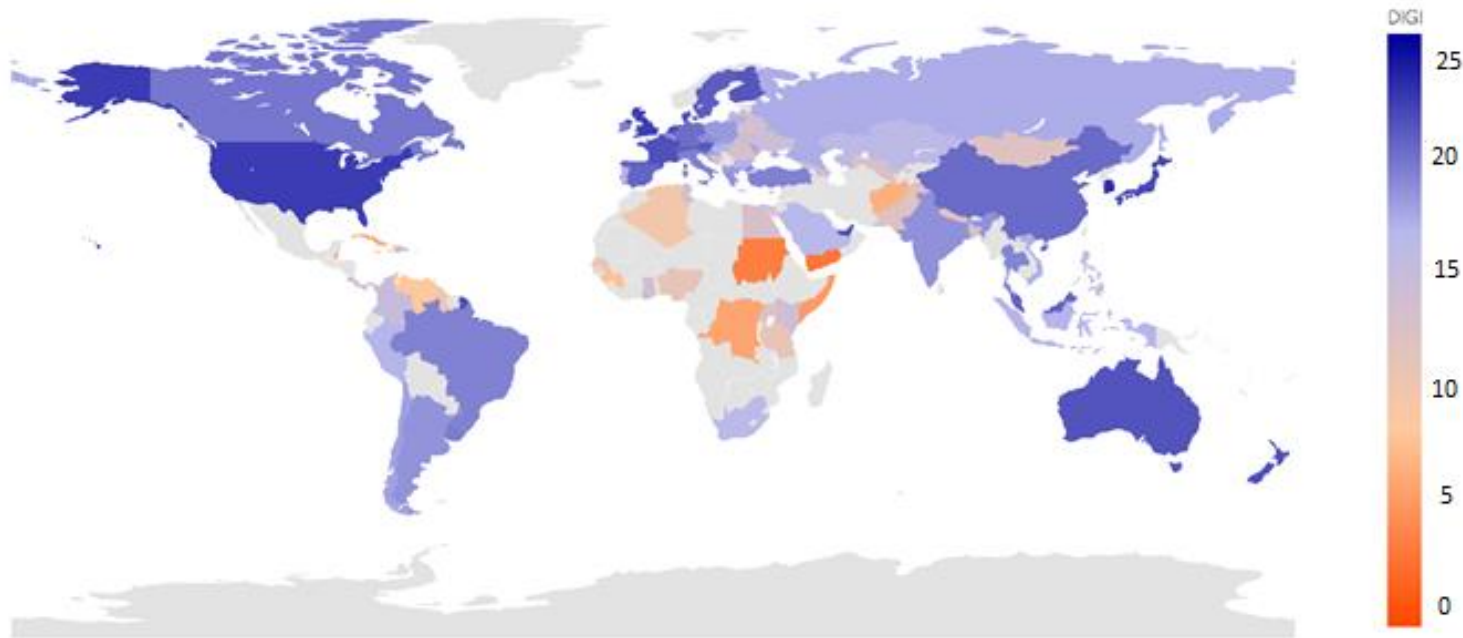
The largest importers of Estonian ICT services (average 2014-2018):

- Finland
- USA
- Germany
- Sweden
- Latvia
- United Kingdom

The largest share of Estonian ICT services from total ICT services import (average 2014-2018):

- Malta (39.7%)
- Latvia (23.4%)
- Lithuania (14.4%)
- Cyprus (2.8%)
- Finland (1.7%)
- Ireland (0.7%)
- Sweden (0.6%)

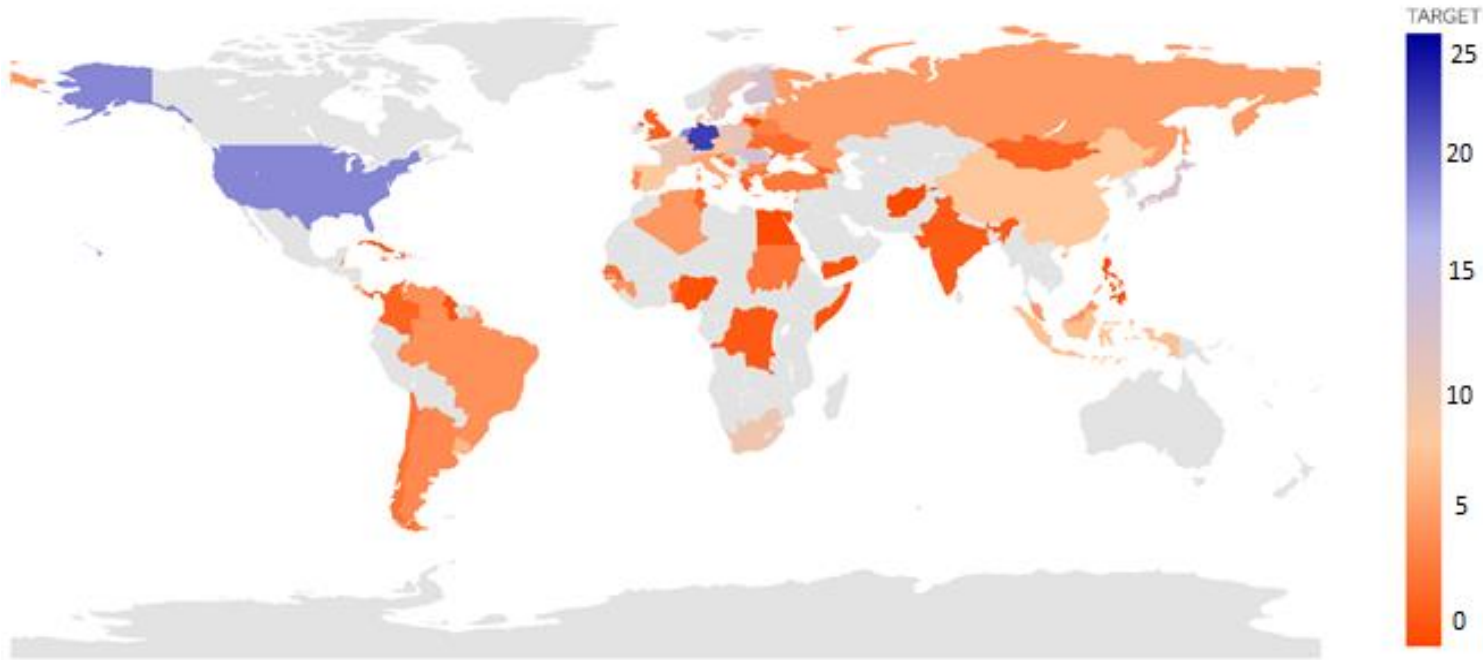
DIGI: The state of digitalisation



25% score, with data assigned from:

- 15% is for current level on United Nations E-government Development Index data of e-government development
- 5% score based on World Bank Digital Government/GovTech Systems and Services database
- 4% - World Economic Forum's Global Information Technology Report
- 1% - *ex ante* and *ex post*, perceived level of ICT sector and e-government development

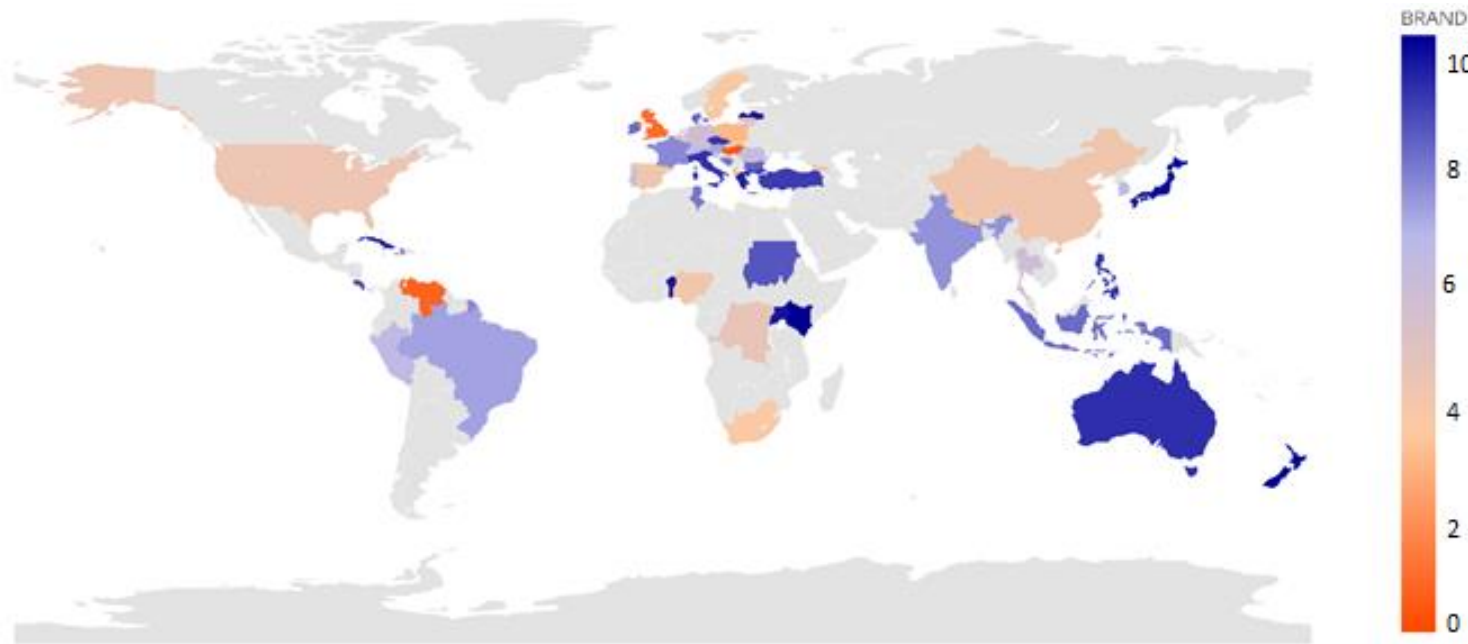
TARGET: High potential target markets for digital transformation



25% score, with data assigned from:

- 10% on Growth potential of e-governance development level in the country by United Nations E-government Development Index
- 25% score based on World trade organisation data on import value of ICT services (openness to imports, taking external experts)
- -5% excluding the weakest areas of e-government development from World Bank Digital Government/GovTech Systems and Services database
- -5% from human resources available for the ICT sector from GitHub data

BRAND: Awareness and perception of Estonia and e-Estonia

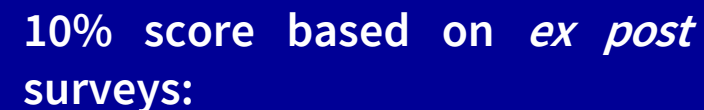


10% score based on *ex ante* and *ex post* surveys:

- 5% on Trust in Estonia as an international leader in digitalisation area
- 1.5% - Awareness of Estonian ICT companies
- 2.5% - Awareness of e-Estonia brand
- 1% - Interest in e-Estonia, e-Residency and digital citizenship from Google trends

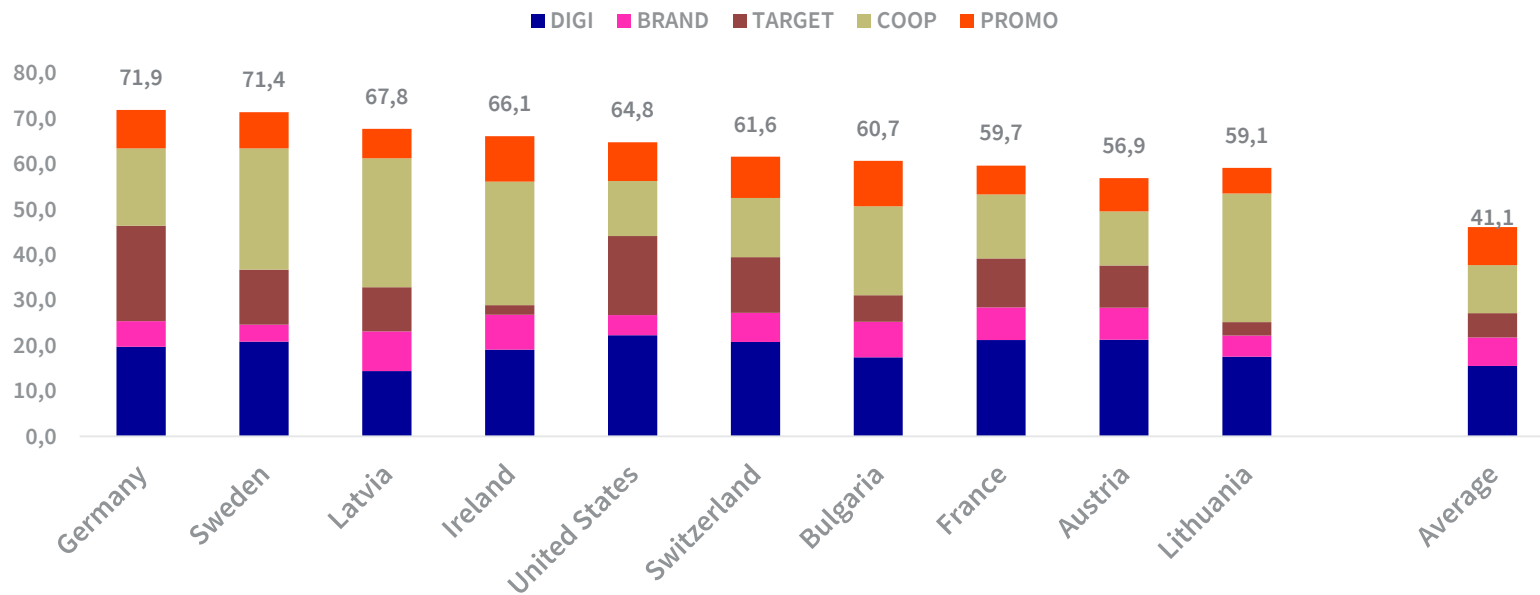
SOURCE: *Ex ante* and *ex post* surveys

SOURCE: *Ex post* surveys



- 5% on Impact of e-Estonia Briefing Centre presentation on perception of ICT level in own country
- 2% - Impact of e-Estonia Briefing Centre presentation on ICT partnership possibilities
- 2% - Impact of e-Estonia Briefing Centre presentation on readiness to act
- 1% - Evaluation of the e-Estonia Briefing Centre presentation

Results: top 9 countries with more than 3 answers



Other countries on the radar: Bulgaria (all solutions of interest), Czech Republic (e-Tax, i-Voting, e-Healthcare) as Eastern European countries with similar population, Denmark (e-Prescription, e-Tax) as top digitally advanced country in Europe

SOURCE: e-Estonia Reputation Index

Top countries:

- Germany – the highest ranking in readiness to make digital transformation (interest in e-Identity, e-Signature, i-Voting)
- Sweden – significant cooperation partners in terms of ICT services, high level of digitalisation (i-Voting, to a small extent e-Residency)
- Latvia – neighbours, although behind the e-government digitalisation level. Could have good opportunities for expansion. Aware of branding, hesitant to act.
- Ireland – good digitalisation level, but hesitant to transform digitally. High awareness of e-Estonia offering.
- United States – high readiness to change, while also high digitalisation level but not in all states equally.

N.B. The methodology provided is applicable to the given dataset and has been developed for the first time, thus the proportions of the evaluation are subject to change based on the data interpretation and more insights investigating the country situation in detail.

e-Estonia brand communication recommendations and ideas

by

Andris Rubīns, NORD DDB Riga

recommendations & ideas



Overcoming barriers



Breaking into
Pop-culture



Context-driven
Reactions

3 barriers:

- + security
- + unemployment
- + digital skills

demystify cybersecurity

+ How?

Showcase excellence in cybersecurity events and hackathons with the help of White Hats (Ethical Hackers)





address the lump of labour fallacy

"It's the idea that there is a fixed amount of work to be done in the world [...]"

"A famous example: those dire warnings in the 1950s that automation would lead to mass unemployment."

-Paul Krugman

Unemployment has decreased despite automation

SOURCE: International Labour Organization– Unemployment Rate %, 2005 to 2020
EU (Eurostat)



Community & Government


Get involved with your government and community alongside Doris Kearns-Goodwin and Paul Krugman.

[GET STARTED](#)[WATCH TRAILER](#)

teach digital skills

Welcome to the Elements of AI free online course!

Join over 650,000 other people learning about the basics of AI.

Choose country  Global ▾

[Start our courses ▾](#)

+ Why?

People across the globe lack digital skills.

+ How?

Branded Masterclass & a freely accessible University MOOC (Massive open online course) programme

recommendations & ideas



Overcoming barriers



Breaking into
Pop-culture



Context-driven
Reactions



people's attention is
scattered



5000

commercial
messages a day

89%

of ads remain
unnoticed

47%

use ad blockers

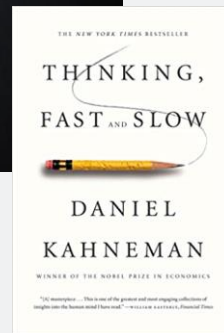
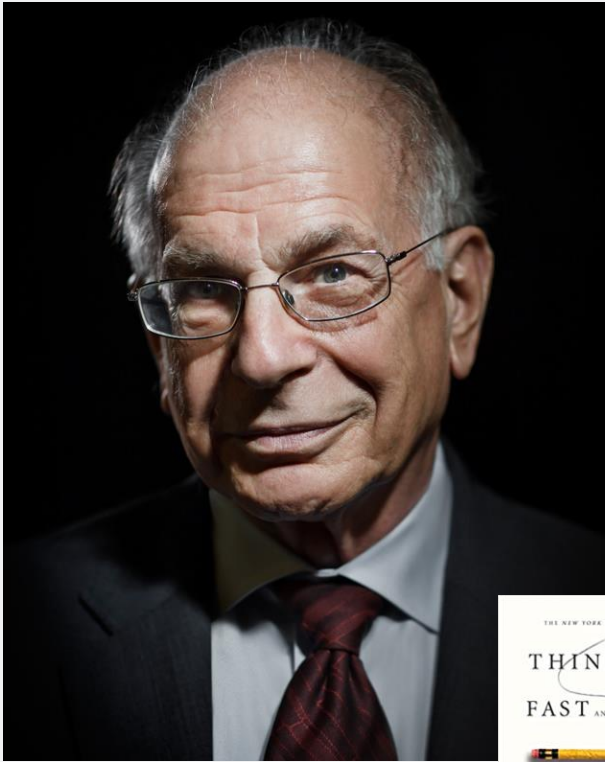


we are also competing with:

hollywood
silicon valley
music industry
sports
gaming
memes
cat videos



opportunity for e-Estonia to
break into culture and
conversations



“We think much less than we think we think. Fast feelings drive decisions, slow thinking rationalises the reasons.”

– Daniel Kahneman



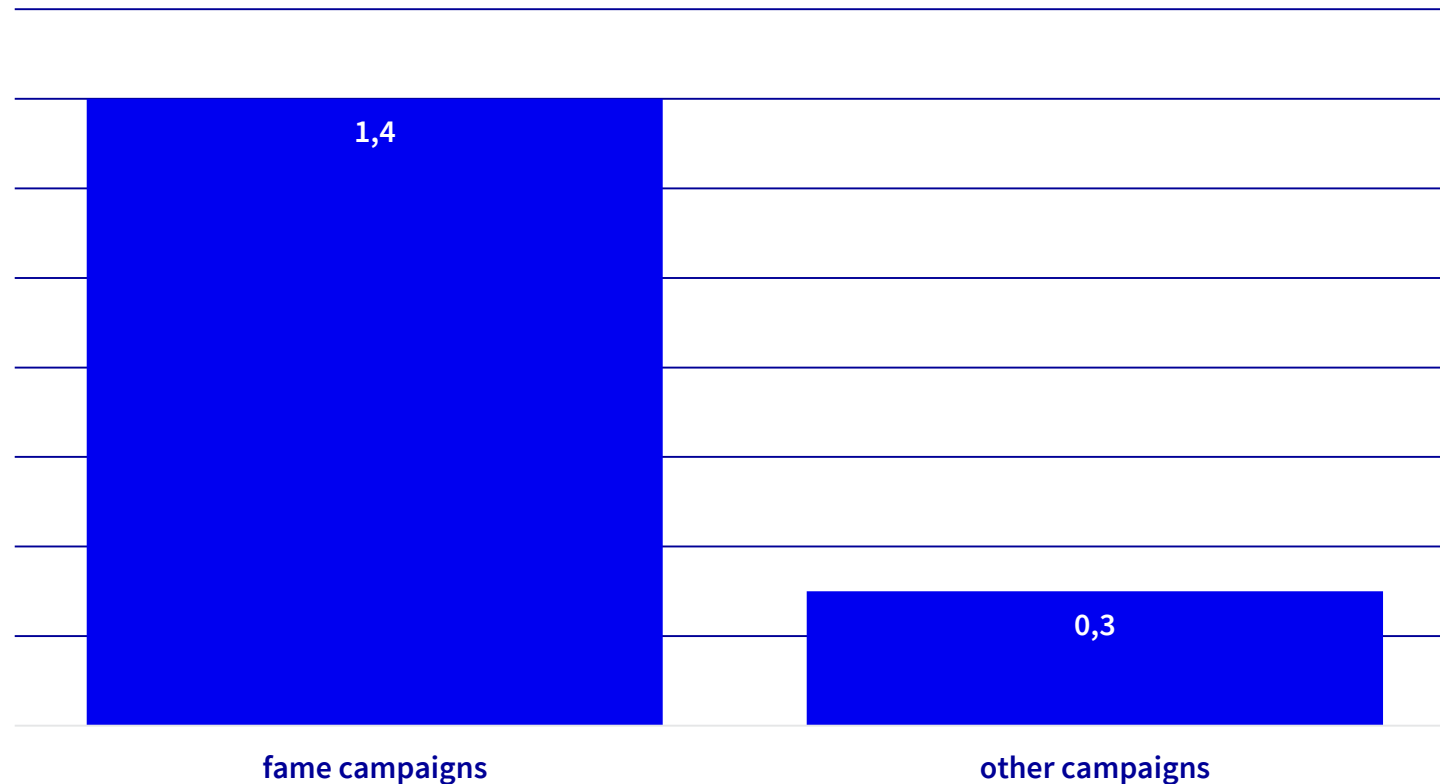
95%

**of our decisions are driven
by emotions.**

(Daniel Kahneman, Thinking fast and slow)

fame increases efficiency 4x

Les Binet and Peter Field,
IPA Datamine



land of unicorn installations

+ What?

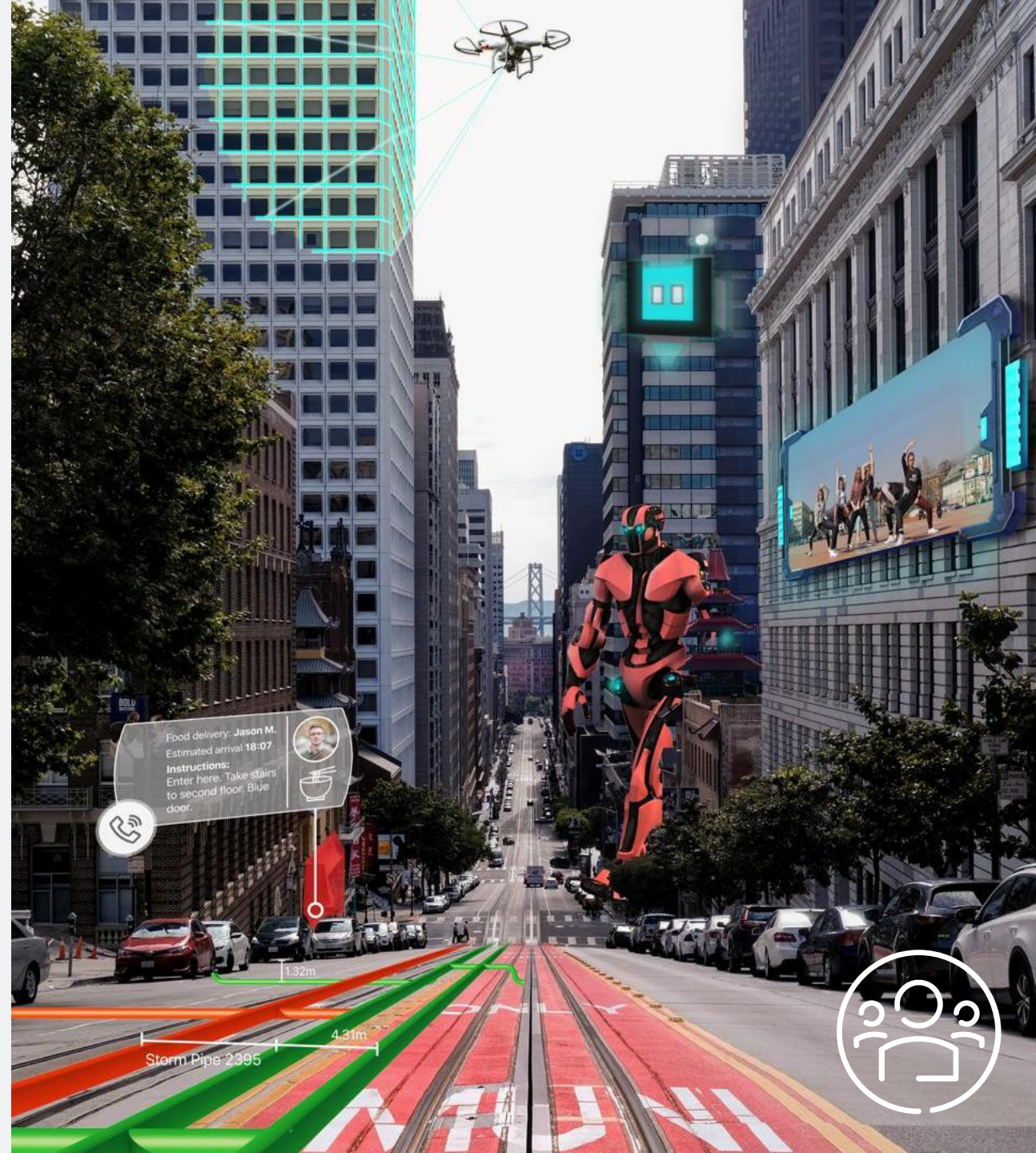
Unicorn installations and interactive AR experiences to generate Social Buzz.

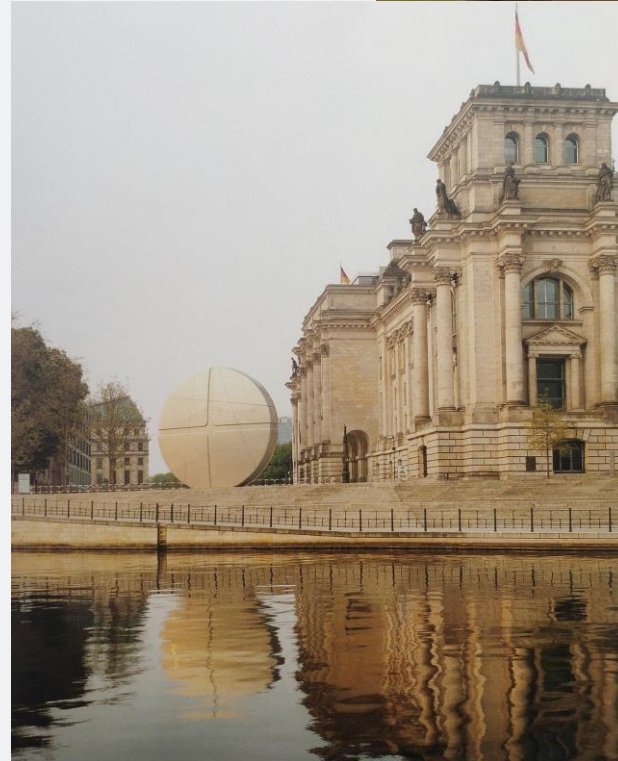
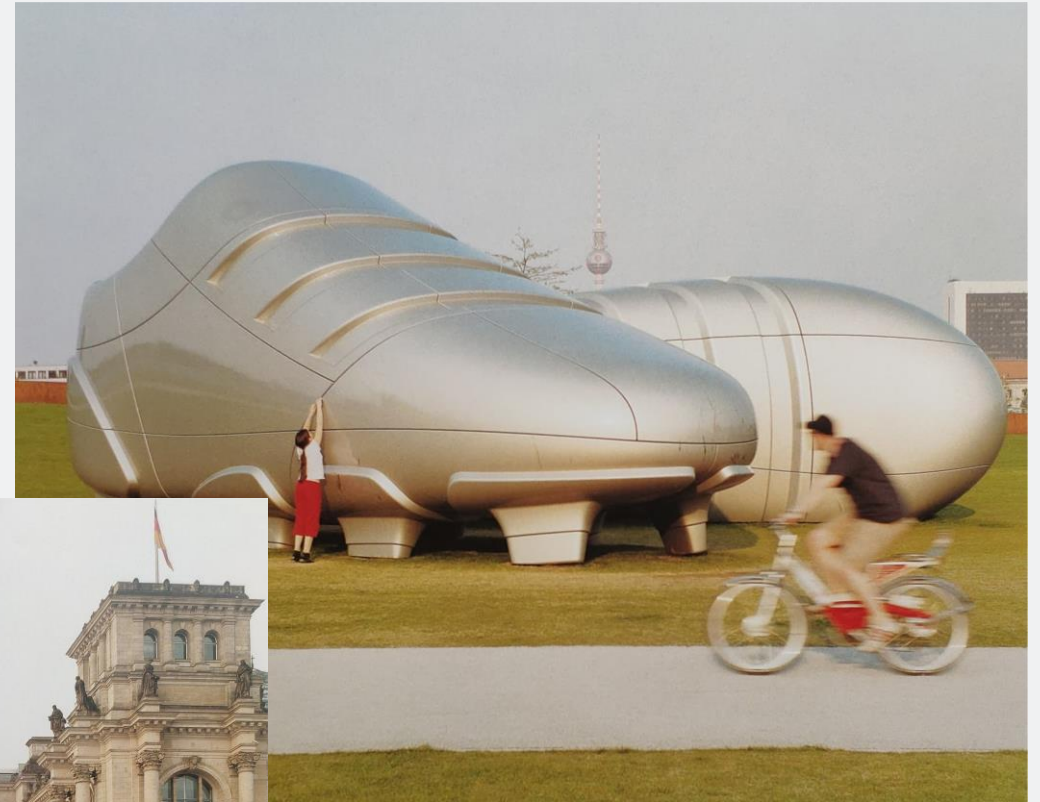
+ Where?

Tallinn and capitals of the world.

+ Why?

Connect Success Stories to e-Estonia.





GERMANY -
LAND OF IDEAS

e-Estonia briefing centre



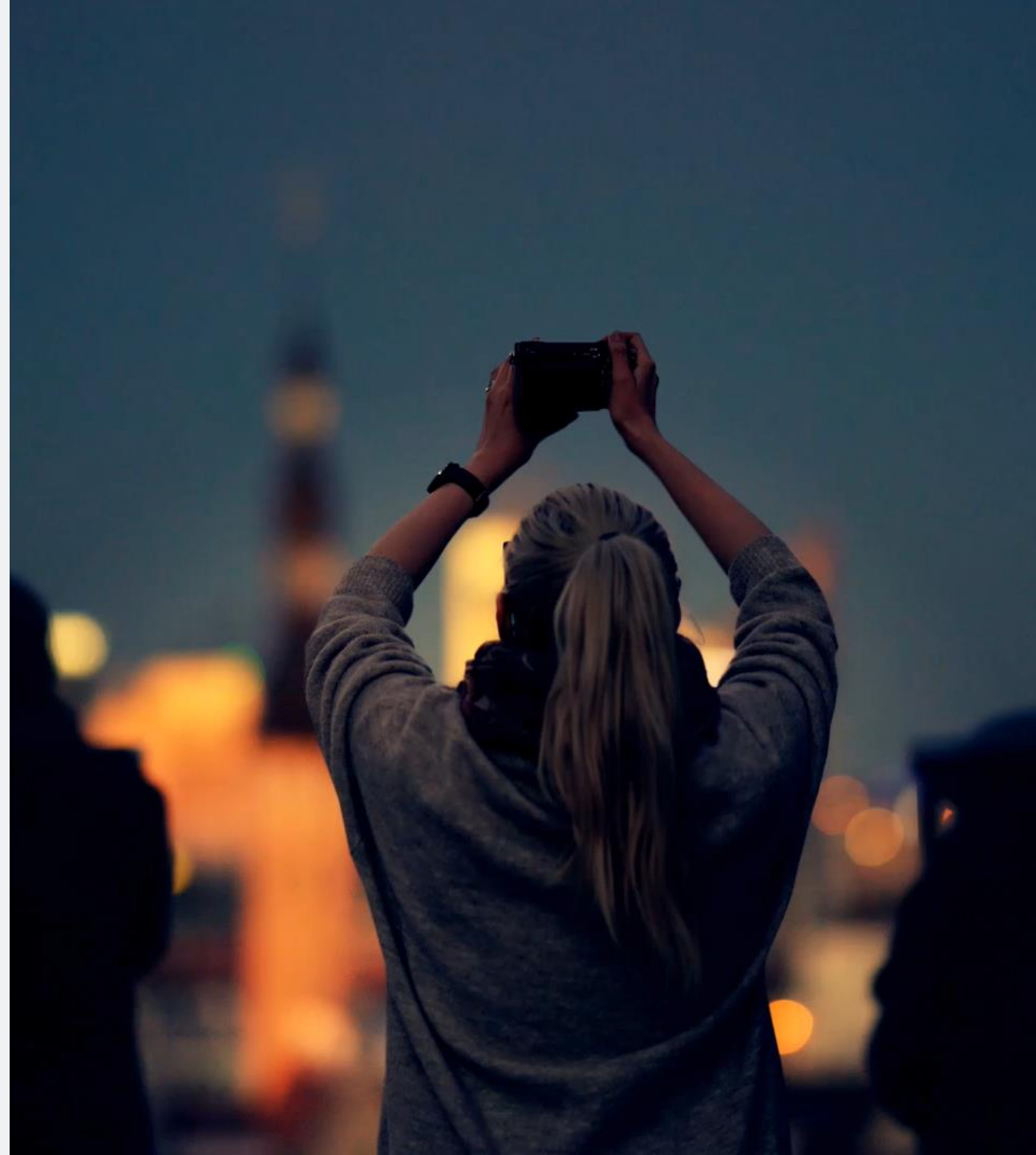
engage brand ambassadors more actively

- + Why?

New personal touch-points.

- + Who?

Government officials, e-Residents, Expats.



@askestonian

THE SWEDISH NUMBER

+46 771 793 336

The first country in the world with its own phone number.
Get connected to a random Swede and talk about anything.

LOCAL NUMBERS

ANSWER FOR SWEDEN

recommendations & ideas



Overcoming barriers



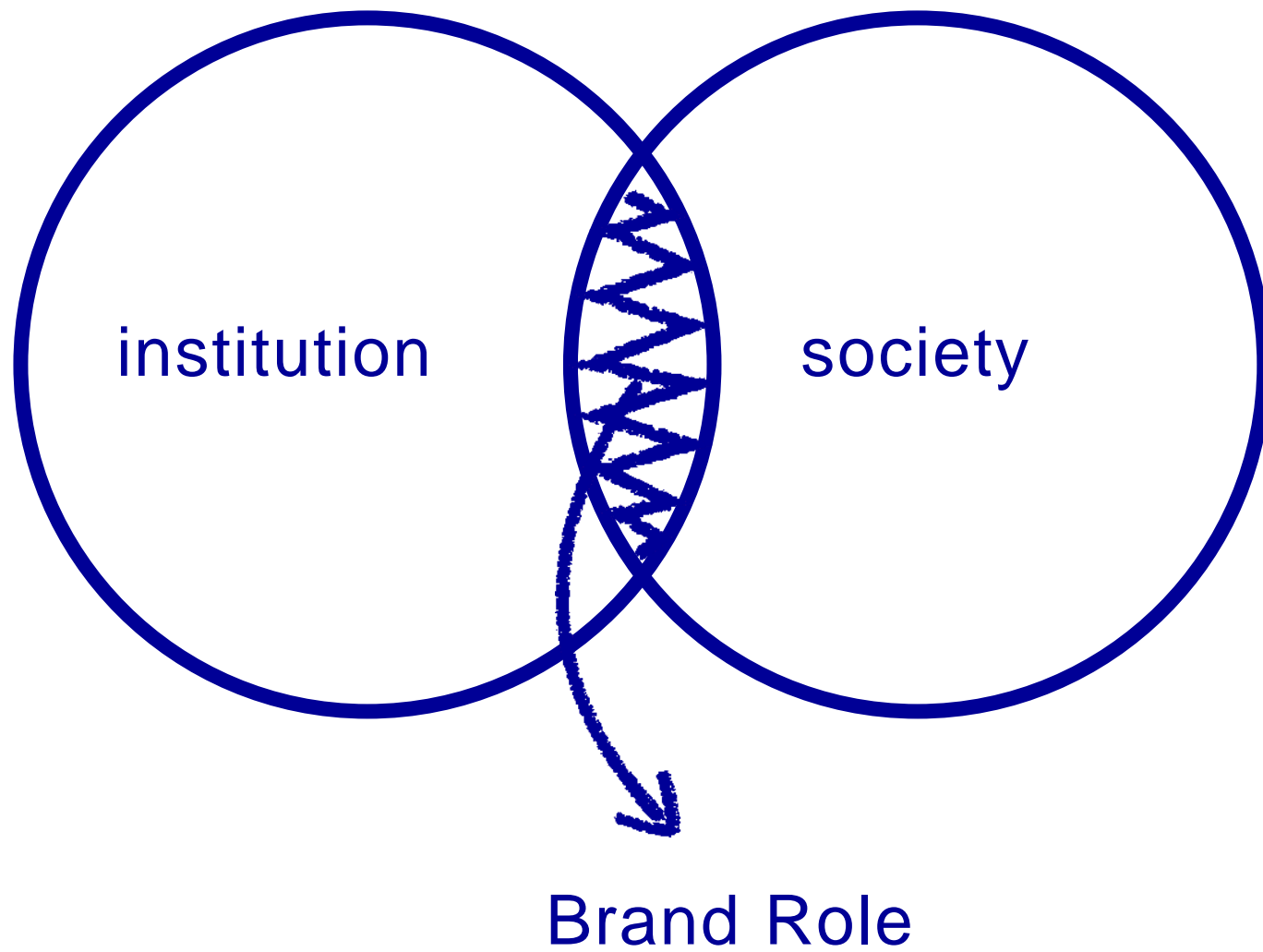
Breaking into
Pop-culture

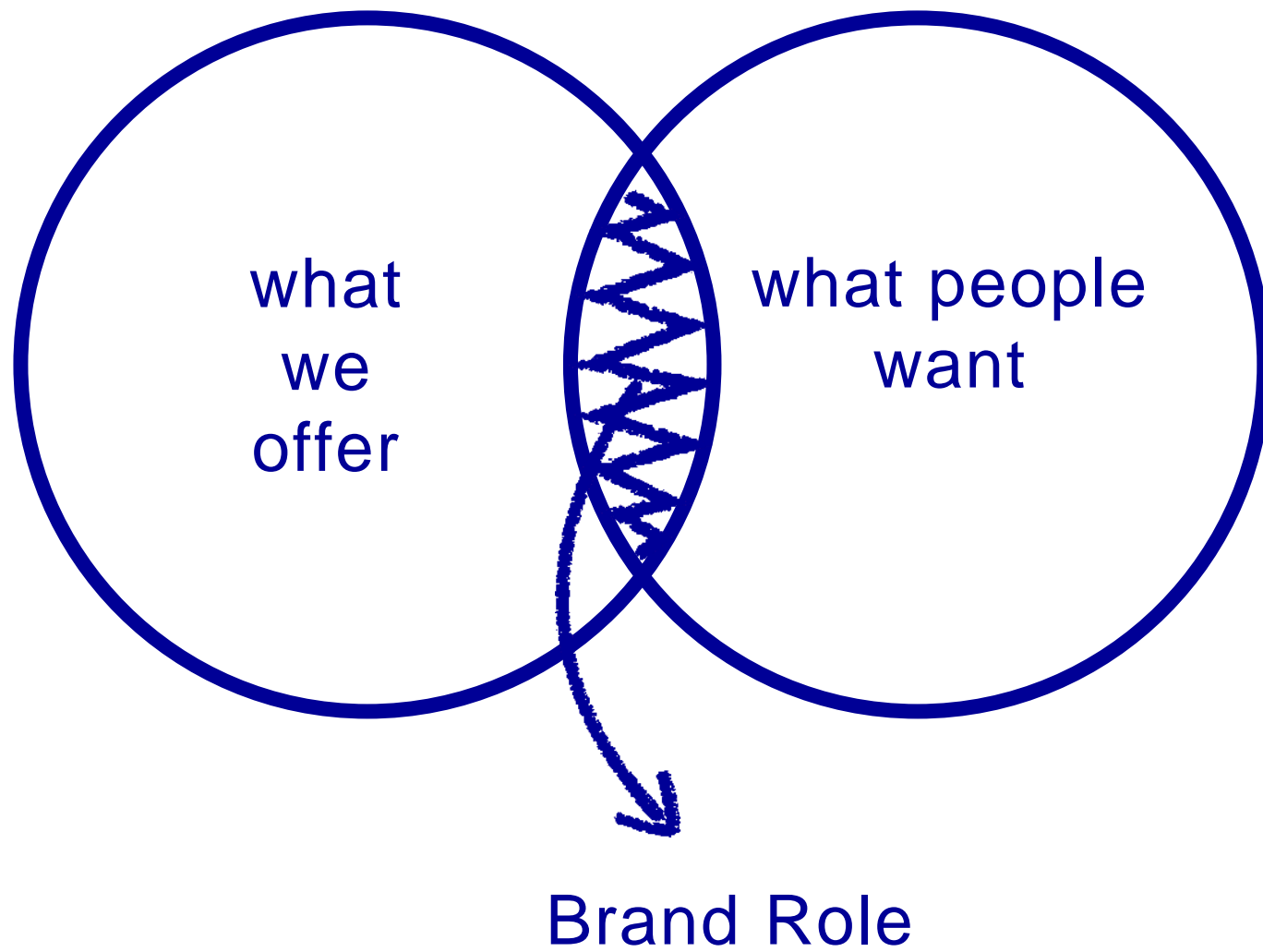


Context-driven
Reactions



content = king
context = queen







Brad is single

Los Angeles. From/one way, incl taxes.

£169*

improvised marketing interventions

+ Why?

Capitalise on the wave of social interactions.

+ How?

Complemented with quick wit, catchy visuals, videos, polls and other features.

+ Targeted advertising when niche audience demands it



Our
SH**HOLE BEACHES
go on for days...

#LoveHaiti

REGENCY


content + context =





Verohallinto



verohallinto  In Finland we have this thing called Torille = To the marketplace! Finland has the most EPIC taxpayers in the world: 1,35 million people revised their tax returns and most did it online 🥳 Thank you!

We have a VISION: Now that the EUROS are in order it's time to support Finland [@blindchannel](#) in the EUROVISION song contest. Put your 👉 up!

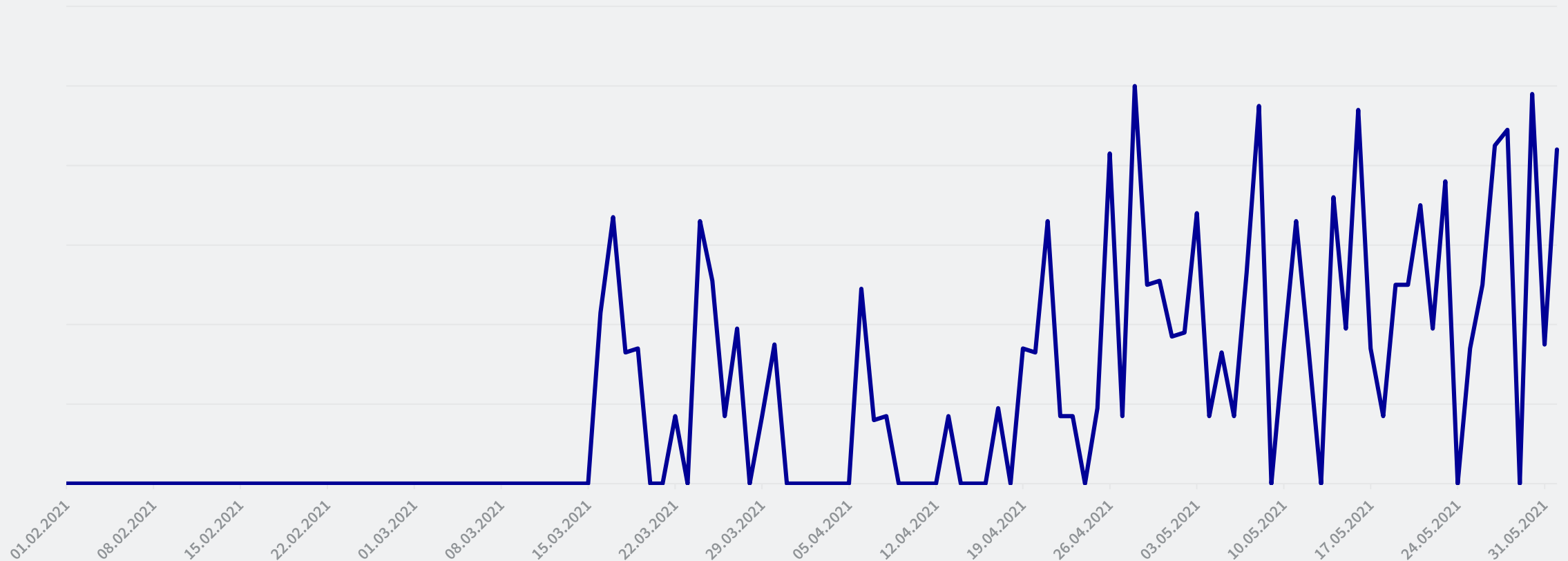
[#eurovision](#) [#eurovision2021](#)

2w

1,617 likes, 16,185 views

«Digital Green Certificate»

SOURCE: GOOGLE TRENDS– June 2021



how do we make this happen?

- + tracking real-time trends & conversations

- + creating real-time content

recommendations & ideas



Overcoming barriers

- + demystify cybersecurity.
- + address the lump of labour fallacy
- + teach digital skills



Breaking into Pop-culture

- + land of unicorn installations
- + engage more with brand ambassadors
- + enhance online EBC experience



Context-driven Reactions

- + tracking real-time trends & conversations
- + creating real-time content

Thank you!

overview of suggestions

TARGETING

e-Estonia brand communication should be divided for 2 target groups:

- + general population
- + key decision makers

GENERAL POPULATION

- + content should be **entertaining and simple**, i.e., easy to consume
- + focus on **shareable content** in social media using a story-telling approach

KEY DECISION MAKERS

- + highly **targeted and customised** marketing communication depending on the country
- + focus on **using data and case studies** as arguments to persuade the decision makers of Estonia's abilities:
 - + technical specs of specific e-solutions
 - + white papers for political leaders
 - + use of testimonials and study trips

overview of suggestions

- + Content is king, context is queen - communication should be contextual, i.e., responsive to the current events in the world
- + Bring e-EBC experience to everyone - consider bringing e-EBC presentation experience to the general public
- + Increase the power of brand ambassadors - engage Estonians abroad, as well as e-residents
- + Do not be afraid to use history in marketing - one pre-existing association with Estonia is that it is an ex-USSR country, so, rather than fight against it, use it as a power-tool (e.g., exactly because of this relationship, Estonia has invaluable experience in cyber-security)
- + Sell expertise and advising instead of products - we have experience to share, work together with local experts
- + Help the world to learn digital skills with branded Masterclasses on Mooc, Udemy, etc.
- + Reduce barriers – through events and educational activities work with people's bias regarding digitalisation
- + Promote the Unicorn Factory via physical installations and/or virtual attractions
- + Ask Estonian – 24/7 helpline