



Report

**DIGITALIZATION OF PUBLIC ADMINISTRATION:
SATISFACTION SURVEY ON THE EXISTING E-SERVICES AND
IDENTIFICATION OF THE NEEDS FOR NEW ONES**

General population - citizens

January 2023

In cooperation with the United Nations Development Programme (UNDP) and the Ministry of Public Administration of Montenegro, CEED Consulting LLC conducted the second *Satisfaction survey among citizens on the existing e-services and identification of needs for new ones*, aiming to assess the level of satisfaction with the existing e-services provided by the public administration, identify the attitudes and preferences concerning the use of e-services and provide suggestions for improvement. The survey took place in December 2022.

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I SURVEY METHODOLOGY AND SAMPLE

1.1. Survey methodology

Within the project **“E-services and digital infrastructure as response to COVID-19” implemented by the UNDP in cooperation with the Ministry of Public Administration (MPA)** and in the aim of accelerating the digital transformation of public administration and efficient service delivery to citizens and businesses in Montenegro, CEED Consulting LLC from Podgorica implemented a second consecutive satisfaction survey on the e-services delivered by public administration. The survey followed the same methodology as the one conducted in November 2021, which enabled comparisons of the results.

The survey aimed to identify citizens' attitudes and preferences concerning the use of e-services and generate suggestions for improvement. In 2022, the MPA conducted a campaign to promote the use of electronic ID card in the process of digitalization and invested strong efforts to set up new e-services and implement initiatives and activities towards the creation of an environment that attracts digital nomads to Montenegro.

In addition to the quantitative survey, focus group discussions were organized with the specific target groups, namely pensioners, students, employed citizens with university education and persons with disabilities. Focus group discussions were organized also with farmers, young entrepreneurs, NGO sector representatives, IT companies and IT professionals working in public administration institutions. The responses and clarifications obtained during these discussions enhance the interpretation of the quantitative survey results.

The findings of the second survey will serve as inputs for policy-makers, informing various action plans for better digital literacy, uptake of e-services and introduction of new e-services.

1.2. Sample

The field study took place in December 2022. The planned sample was 1,040 respondents; the total number of respondents covered during data collection was 1,060. The target group included general urban and rural population older than 18 years of age (male and female) in the three regions, i.e. in all Montenegrin municipalities. The margin of error (for the confidence interval of 95%), i.e. sampling error for the phenomena with 50% incidence was 2.97%.

The survey used the CATI method (Computer Assisted Telephone Interviewing), while 30% of the interviews were conducted face-to-face.

Data processing involved the required logical controls in SPSS (Statistical Package for the Social Sciences, used to process and analyze data).

Given the sample design method and the methodology employed, the findings presented here may be considered to constitute valid inputs for policies on the development of e-services.

II SURVEY RESULTS

The survey provided data and information on the following:

- ✓ Use of the new ID card (eID)
- ✓ Familiarity with the term “digital nomads“,
- ✓ Familiarity with the eParticipation and ePetition portals, and
- ✓ Cyber-attack impact on the use of e-services.

The survey included closed and open questions in order to capture both numerical data and specific suggestions for improvements in the fields of e-services use.

2.1. Socio-demographic characteristics

The respondents covered by the survey lived mainly in urban areas i.e. towns, namely 67.4%, while one third lived in rural areas.

Of the total number of citizens/respondents covered, 48.6% were male and 51.4% female. Broken down by age, the biggest group consisted of those aged 25-34 (22.6%), followed by those aged 35-44 (19.7%), while those aged 65+ made up the smallest group (9.3%).

In terms of education, almost two thirds of respondents (57.3%) had university or postgraduate degrees.

Table 1: Respondents broken down by gender, age and education (%)

		%
Gender	Male	48.6
	Female	51.4
Age	18-24	17.1
	25-34	22.6
	35-44	19.7
	45-54	17.3
	55-64	14.0
	65+	9.3
Education	No formal education or primary school certificate	5.9
	University and postgraduate	57.3
	Secondary or post-secondary	36.8

The biggest shares of respondents worked in the private (26.0%) or in the public sector (25.8%).

Almost one third (27.0%) of respondents lived in households with a monthly income from €751 to €1,000, while slightly over one fifth (21.7%) lived on the income from €501 to €750. The

increase in the average monthly income compared with the November 2021 survey, when 32.8% had monthly income of €251-€ 500, came as a result of the implementation of the Government economic reform programme that increased net wage from €250 to €450, lowered the employers' labour tax burden and introduced progressive profit taxation.

2.2. Online services and method of communication

The citizens covered by the survey were asked to assess their Internet skills and provide answers about the types and frequency of use of online services, the public administration services they accessed and the method of accessing them.

The skill self-assessment provided the following results:

- ✓ **39.9% thought they had an intermediate level;**
- ✓ **20.5% thought they had an advanced level;**
- ✓ **9.4% reported having no Internet skills.**

The remaining 30.2% reported they had basic Internet skills.

The respondents who reported no or basic skills were mostly older than 55; with primary education certificates; pensioners, farmers and homemakers, and living in low-income households.

The breakdown by gender does not show any statistically significant differences: **10.6% of all female respondents and 8.2% of all male respondents had no Internet skills. The shares of those with intermediate skills were almost equal** (39.6% male and 40.2% female), with 19.2% of male and 21.7% of female respondents with advanced skills.

The breakdown by age gives results similar to the ones obtained in the 2021 survey. The biggest share of respondents in the 2022 survey, close to a half (49.0%), of those who reported not having any Internet skills were 65 or older, while 79.0% were 55 or older. A high share (41.0%) of those aged 25-34 reported having advanced Internet skills.

Citizens living in the northern region of Montenegro predominated among those who had no Internet skills; this suggests the need for further investments in IT education and improving the living standard in this specific region.

Respondents used the Internet very often or daily to obtain information, exchange emails or spend time on social networks. Table 2 below shows that **68.5% accessed information online every day by searching Google, YouTube etc.** Almost two thirds of respondents accessed social networks every day, while 16.6% did not use them at all.

More than a half of respondents engaged in email communication every day or several times a week.

40.6% of citizens used e-services every day, several times a week or several times a month.

Table 2. Types and frequency of use of online services (%), 2021 and 2022

What type of online services do you use and how often?

Respondent pool: Entire population of respondents

Online service	Every day		Several times a week		Several times a month		Several times a year		I cannot estimate		I do not use these services	
	2021	2022	2021	2022	2021	2022	2021	2022	2021	2022	2021	2022
Information search/obtaining information (Google, YouTube)	75.7	68.5	13.9	20.4	2.0	2.9	0.8	0.7	0.7	1.3	6.9	6.5
Social networks (Facebook, Instagram, Twitter, LinkedIn etc.)	66.1	59.2	13.6	15.3	3.5	5.9	0.8	1.0	0.8	2.0	15.1	16.6
Online learning/training	11.2	10.0	23.0	14.8	9.4	12.3	8.0	11.3	6.0	5.5	42.5	46.1
Online meetings/ video communication/video conferences	10.4	8.9	17.9	14.8	10.7	12.3	9	13.9	5.7	7.8	46.3	42.4
Online shopping	10.0	7.1	16.2	15.1	15.3	14.4	16.4	15.4	5.6	7.6	36.4	40.4
Netflix, HBO etc.	11.8	15.5	15.6	13.2	8.6	9.7	7.0	7.3	4.7	9.0	52.2	45.2
Gaming/online gambling	7.6	8.3	12.2	12.1	5.0	5.7	4.3	5.8	4.6	7.6	66.3	60.5
Email	34.2	34.7	20.5	17.2	10.5	11.5	5.6	7.5	5.1	6.8	24.1	22.7
Accessing e-services	15.3	11.0	18.0	14.1	13.1	15.5	8.0	11.9	10.6	13.8	34.9	33.8
Checking account balances, making payments (e-banking)	18.8	16.6	19.1	20.8	12.7	15.9	5.2	6.9	5.8	9.1	38.5	30.8

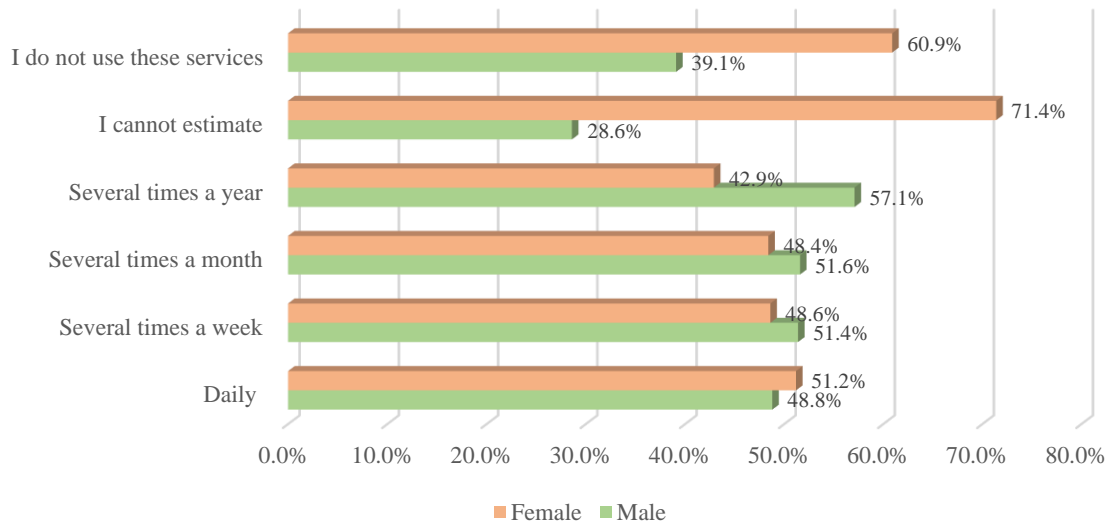
Following the Covid-19 pandemic, a decline is noticed in online shopping, but also in online learning. A positive change is noted also in less use of the Internet for gaming and online gambling purposes, and it is encouraging that, regardless of the frequency of use, the share of e-banking users increased (69.2% in 2022 against 61.5% in 2021).

There are no major differences between male and female respondents in terms of the frequency of use of these services.

The graph below shows the gender breakdown of the results obtained for using the Internet to search for information via Google, YouTube etc., with some minor differences noted.

Graph 1. Frequency of use of the online service of “Running information search/obtaining information“, by gender, in %, in 2022

*What type of online service do you use and how often?
Respondent pool: Entire population of respondents*



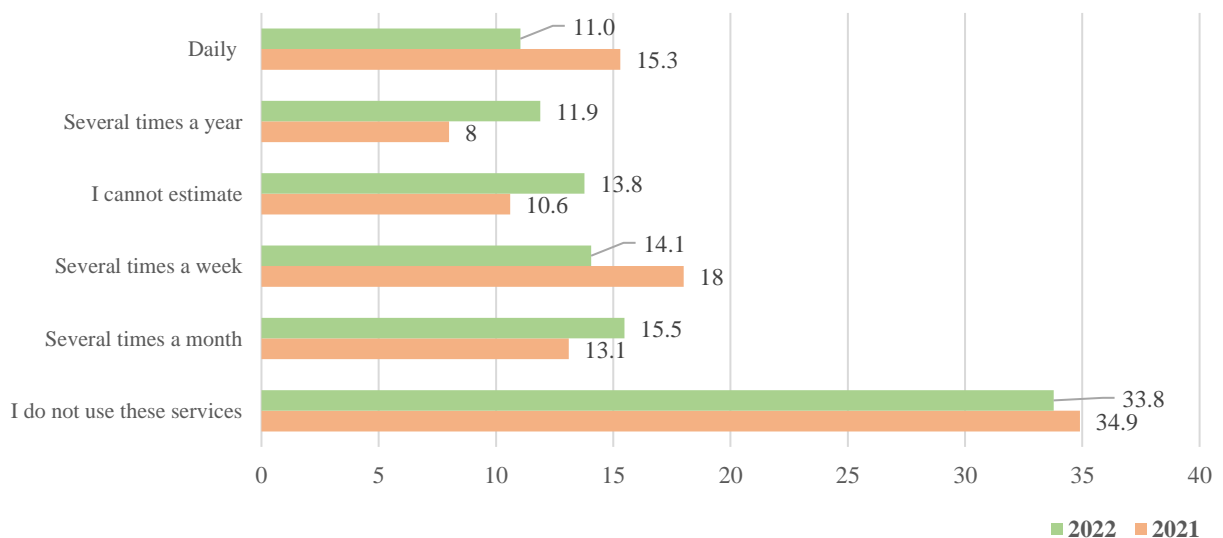
Online gambling is most present among younger population. In addition, of the total number of respondents who reported daily use of this service, 42.0% were aged 18 – 24, and 27.3% were aged 25-34.

Graph 2 shows the frequency of use of e-services. It supports the conclusion that no major changes happened compared with 2021, except in the frequency of use over a specific period (weekly, monthly, per year).

Graph 2. Frequency of use of e-services, in %, 2021 and 2022

How often do you use e-services?

Respondent pool: Entire population of respondents



Analysis by age group shows that those aged 25-34 used these services the most, and those 55 or older used them the least. Of all respondents aged 25-34, 16.3% used e-services every day, 23.3% several times a week and 15.0% several times a month.

The use of e-services varied depending on the household income: the higher the income, the higher the share of respondents who used e-services. Of the total number of those using e-

services daily, 32.5% lived in households with a monthly income higher than €1,500. The table below presents detailed data on the correlation between the frequency of use of e-services and household income.

Table 3: Frequency of use of e-services, by household income, in %

Household income	Every day	Several times a week	Several times a month	Several times a year	I cannot estimate
Up to €250	1.7	1.3	0.6	2.4	2.1
€251- €500	10.3	10.7	5.5	11.1	6.2
€501 - €750	17.1	19.5	20.1	22.2	24
€751-€1,000	22.2	30.2	29.9	26.2	32.2
€1,001 - €1500	16.2	19.5	25.0	23.0	21.2
Higher than €1,500	32.5	18.8	18.9	15.1	14.4

Analysis by region shows that one third of the respondents from the northern region used e-services several times a week, while the biggest share of those from the central region used them daily. The biggest share of respondents from the southern region reported using the services several times a year, with just 6.2% using them daily. The respondents from urban areas/towns used e-services more frequently than those from rural areas.

Table 4: Frequency of use of e-services, by region, in %

Region	Every day	Several times a week	Several times a month	Several times a year	I cannot estimate
Northern	12.2%	30.3%	26.1%	17.6%	13.8%
Central	23.9%	21.6%	21.6%	13.6%	19.3%
Southern	6.2%	9.9%	24.1%	27.8%	32.1%

The breakdown by education level shows that 84.1% of respondents with no schooling or primary school certificate did not use e-services. Of those with university education, 22.6% used e-services daily, 20.0% several times a week, and 21.5% several times a month.

With regard to *the channels used to communicate* with public administration concerning service delivery, the biggest share of citizens still accessed most services in person (same as the result of the November 2021 survey). **Traditional public administration services were still preferred to e-services.** Focus group participants confirmed that the reason was frequently not being able to complete the entire service electronically or lacking information about the availability of e-services.

I am not sure whether the fee could be paid electronically so one does not need to wait for hours. – Participant in the focus group with employed citizens with university education

As a citizen, I am not sure which e-services are available or whether some of them have been digitalized, and I interact with people from different walks of life all the time. – Participant in the focus group with young entrepreneurs

The services that got accessed electronically more frequently than the rest in 2022 (eGovernment, other e-portals or mobile apps, where available) were as follows:

- ✓ Covid 19 – test results and digital Covid certificates (25.7%);
- ✓ Getting lab test results (18.8%);
- ✓ Verification of the data from the electoral roll (17.9%);
- ✓ Scheduling appointments with doctors (11.0%);
- ✓ Other health insurance services (medical panels, prescriptions, availability of medicines, accessing the rights pertaining to health insurance) (7.9%);
- ✓ Enrolment in educational institutions (university departments, schools, kindergartens) (5.5%);
- ✓ Applying for student loans (4.2%).¹

The coronavirus pandemic generally prompted greater use of e-services, in the circumstances of restricted movement and working hours and changed regime of operation of public sector institutions. According to the experiences shared by the focus group participants, the opportunity to boost the use of digitalized services was missed, and institutions and users are reverting to old routines. The following inputs from focus group participants support this claim.

When I went to the university to pay the instalment, I wanted to send them the e-banking statement, the way we used to during the COVID-19 pandemic, but that was not possible. I had to go to the counter and the clerk told me that “the coronavirus was over and I had to bring the payment slip“. – Participant in the focus group with students

Even though e-service is available, they insist on in-person submissions. Last year, when applying for training, although we applied via eGovernment, we had to submit documents in person to the Employment Office. The question arises – why fill in an electronic application in the first place? – Participant in the focus group with NGOs

I assume that insufficient promotion is a key reason for the decline in the use of e-services. Based on our experience, whenever we promoted e-service we recorded no decline in their use. This year, however, we thought that all e-services were sufficiently promoted over the past 3 years and we focused more on designing new ones. And as we are working on the new e-services, we are seeing a drop in the use of the existing ones. Constant promotion is needed. – Participant in the focus group with the IT professionals working in public administration institutions

¹ All the other ones were at 3% or lower.

2.3. Satisfaction with the delivered e-services

Respondents were asked about *their satisfaction with the services* accessed via the eGovernment portal or other e-portals that provided e-services. As in 2021, around **three quarters were mostly or fully satisfied with the use of public administration e-services**. Some of them shared that during the focus group discussions.

I had a positive experience with using e-services when I applied for the residence certificate via the website and received it to my home address two days later. At the time, that was really helpful. – Participant in the focus group with employed citizens with university education

During the COVID-19 pandemic, my experience with eHealth was very positive. I got the lab results by email and did not need to go there in person. That made it much easier and saved me some time. – Participant in the focus group with students

Although the citizens who used e-services were largely satisfied, the question arises about the way to boost their use. For instance, with the local elections taking place in 2022, an increasing number of respondents used either the mobile app or other e-portals to check their data in the electoral roll (see Table 5). This suggests that respondents are willing to use e-services, but need more information about the benefits attached, in particular in terms of lower costs compared with in-person visits, phone calls or mail.

I always wonder when I hear that there are more than 20 e-services provided by public administration, and I cannot list even two. – Participant in the focus group with NGO representatives

If you need a document, you have to get it done during the working hours. There are no alternative slots – I have to leave my workplace and postpone some work things to visit the institution in person, without even knowing how long it is going to take. - Participant in the focus group with employed citizens with university education

A number of services were accessed less via the eGovernment or other e-portals, where respondents reported not being able to estimate their satisfaction or being dissatisfied in general. They reported the main reasons for such dissatisfaction as “*the service delivery took too long*” or “*the service was not delivered at all*“. A share of respondents reported that “*it was difficult to figure out what to enter and where*“.



Table 5. Ways of accessing various public administration services, in %, 2021 and 2022

	Email		In person		Mobile app		eGovernment portal		Mail		Other e-portals		Phone		I have not used any	
	2021	2022	2021	2022	2021	2022	2021	2022	2021	2022	2021	2022	2021	2022	2021	2022
Issuance of personal identification documents	0.7	1.1	74.1	58.0	0.0	0.5	0.9	0.7	0.3	0.3	0.8	0.8	2.2	1.0	20.9	37.6
Statements and certificates from official registers	1.1	0.9	72.5	55.2	0.0	0.7	1.4	1.1	0.6	0.6	1.1	0.9	1.7	1.2	22.0	39.3
Change of address	0.7	0.5	33.1	22.4	0.0	0.3	0.3	0.4	0.4	0.6	0.4	0.2	2.1	0.9	63.4	74.8
Obtaining data from criminal and/or misdemeanour records on physical persons	1.4	0.9	21.3	20.8	0.0	0.3	0.3	0.3	1.8	1.9	0.3	0.3	2.1	1.2	73.3	74.2
Applications, certificates and forms issued by the Capital City, Royal Capital and local governments	2.2	2.4	32.2	35.8	0.0	0.6	3.3	0.9	1.6	0.8	2.6	0.8	2.1	0.7	56.4	58.0
Registration of building/regularization of built structures	0.7	0.5	20.2	13.3	0.0	0.3	0.5	0.2	0.5	0.4	0.6	0.0	1.6	0.5	76.1	84.9
Cadastral services	1.3	0.9	27.2	23.4	0.0	0.5	0.8	1.0	0.7	0.8	1.2	0.8	2.5	1.0	66.3	71.5
Payment of real estate tax	0.9	0.5	32.5	34.4	0.0	1.7	0.5	0.1	3.2	3.0	0.5	0.5	1.3	0.3	60.1	59.5
Vehicle registration	0.4	0.2	59.9	59.0	0.0	0.4	0.3	0.1	0.3	0.6	0.2	0.2	1.5	0.9	38.0	38.7
Verification of data from the electoral roll	0.7	0.5	14.8	10.6	0.0	2.4	6.8	8.1	1.2	1.1	5.4	27.4	9.2	3.2	61.9	66.8
Enrolment in educational institutions (university departments, schools, kindergartens)	3.0	1.8	32.2	22.7	0.0	0.4	3.3	2.7	0.5	0.5	3.6	2.4	1.6	0.6	55.8	69.0
Applying for scholarships	2.2	1.9	8.0	6.4	0.0	0.5	1.6	1.3	0.6	0.4	1.2	0.8	1.8	0.5	85.1	88.3

² Note: Online verification for the data in the electoral roll is possible only via the Birači.me portal. The users who selected the e-uprave (eGovernment) portal thought that had accessed that service from there; this suggests lack of information among citizens.

Applying for student loans	1.2	1.0	8.6	4.8	0.0	0.0	0.9	1.8	0.5	0.4	0.3	1.1	1.2	0.3	88.0	90.7

	Email		In person		Mobile app		eGovernment portal		Mail		Other e-portals		Phone		I have not used any	
	2021.	2022.	2021.	2022.	2021.	2022.	2021.	2022.	2021.	2022.	2021.	2022.	2021.	2022.	2021.	2022.
Applying for student loans	1,5	1,5	7,3	4,2	0,0	0,4	2,7	3,1	0,5	0,3	0,3	0,7	1,2	0,2	87,4	89,7
Applying for a the civil service examination	1,4	1,1	12,1	7,0	0,0	0,4	1,7	1,7	1,1	1,3	0,5	0,1	1,6	0,7	82,2	87,7
Starting a business/registering an NGO	0,7	0,7	8,2	5,9	0,0	0,2	0,3	0,3	0,2	0,2	0,6	0,2	1,1	0,6	89,4	92,0
Reporting corruption	0,7	0,6	3,3	2,4	0,0	0,6	0,4	0,1	0,4	0,2	0,7	0,4	2,1	1,3	93,1	94,5
Entry into the Farm Register	0,7	0,3	6,2	7,5	0,0	0,1	0,2	0,0	0,6	0,3	0,2	0,2	1,2	0,3	91,7	91,4
Records and applications related to farming	0,5	0,4	6,3	8,5	0,0	0,4	0,3	0,3	0,7	0,6	0,3	0,2	1,6	0,6	90,8	82,2
Registration of birth/applying for child allowance	0,7	0,3	18,3	24,2	0,0	0,2	0,3	0,2	0,3	0,7	0,4	0,2	1,0	0,8	79,6	73,6
Retirement application	0,4	0,1	9,0	6,0	0,0	0,1	0,6	0,3	0,3	0,1	0,3	0,4	1,3	0,5	88,8	92,5
Scheduling medical appointments	0,9	0,3	38,5	37,7	2,9	2,8	7,3	2,5	0,1	0,3	6,9	5,7	24,0	24,7	19,4	26,0
Getting lab test results	7,1	6,7	41,0	42,5	4,1	4,8	6,8	4,7	0,1	0,1	10,7	9,3	10,6	4,2	19,7	27,7
Covid 19 – test results and digital Covid certificate	10,4	11,9	22,0	22,8	5,5	5,5	10,2	6,9	0,1	0,4	14,2	13,3	12,1	5,2	25,5	34,1
Other health insurance services	1,6	1,1	39,5	35,2	2,1	0,8	3,1	1,9	0,4	0,6	3,5	5,2	8,7	8,3	41,1	46,9



Focus group participants shared their experiences to illustrate the problems they encountered.

The eHealth app would be useful if it worked. Unfortunately, you schedule an appointment, but at the Primary Healthcare Centre in Bar, they tell you that an appointment scheduled online is not valid. – Participant in the focus group with employed citizens with university education

When I wanted to cancel an appointment with the GP, I could not do it online. I tried calling, but nobody answered and I had to go and do it in person. - Participant in the focus group with pensioners

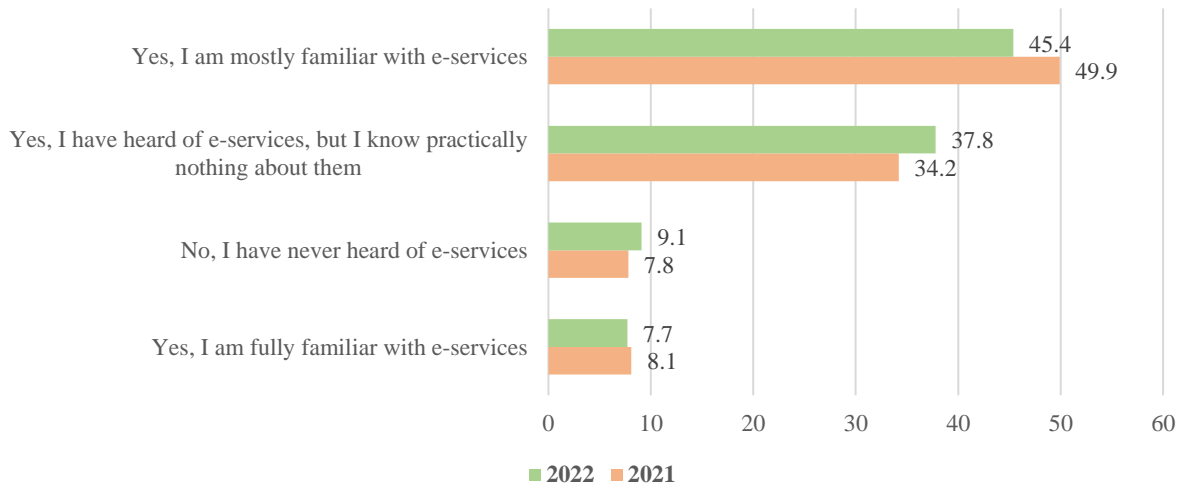
For an appointment with the ophthalmologist, I have to come to Podgorica since it is not available in Pljevlja. I need to visit my GP to schedule the appointment to have the GP ring the ophthalmologist in Podgorica and book me for the first available slot. There is no system that would enable me to schedule that appointment online. Instead, I spend hours in the GP's waiting room to get him to enter me for an appointment in Podgorica in two months. I live in a village and coming to the Primary Healthcare Centre is a problem, as it takes me half a day. It would all be easier if they set up a system that is well-integrated and works. – Participant in the focus group with pensioners

2.4. Familiarity with the availability and ways of accessing e-services; use of e-services and level of satisfaction

Around 45.4% of respondents thought that they were largely familiar with e-services; that share was 49.9% in the 2021 survey. 7.7% reported being fully familiar, against 8.1% in 2021, suggesting no statistically significant difference and supporting the conclusion of no change in citizens' familiarity with the availability and ways of accessing e-services.

Graph 3. Familiarity with the availability and ways of accessing e-services, in % 2021 and 2022

Respondent pool: Entire population of respondents



Of the total number of female respondents:

- 10.1% had never heard of e-services;
- 36.7% had heard of them but did not know anything about them;
- 46.2% were mostly familiar with e-services;
- 7.0% were fully familiar.

The results for male respondents were as follows:

- 8.0% had never heard of e-services;
- 39.0% had heard of them but did not know anything about them;
- 44.5 % were mainly familiar with e-services;
- 8.5% were fully familiar.

Similarly to the 2021 survey, the one conducted in 2022 showed that younger people (aged 18-44); respondents from the northern and central region; respondents from urban areas/towns; respondents with secondary and university education, and those working in public and private sectors were more familiar with e-services than the rest.

Those older than 65 had mainly heard of e-services but knew practically nothing about them (50.5%, whereas one third had never even heard of e-services).

I believe that if an e-service is designed and it turns out to be of good quality and to work well, everyone will know about it very soon! - Participant in the focus group with employed citizens with university education

My daughter pays all of her bills digitally, but I prefer going to the counter to do that because then I interact with other people. Being a pensioner, I am not very busy, so I take the time to go to town and have a walk. - Participant in the focus group with pensioners

With regard to the ways those who used e-services **obtained information, they reported the following main sources:**

1. **Social circle** – family members, friends and colleagues – **25.5%**;
2. **Directly from the eGovernment portal** – **18.2%**;
3. **Websites of the institutions delivering e-services** – **15.9%**.

I get information from older colleagues, friends and family. There is a lack of information on the Internet about the use of e-services, so I am compelled to look for someone who has already had that experience and can explain to me how it goes. This has proven to be the most efficient option. - Participant in the focus group with students

We use a number of ways to promote e-services, but even so I think that if a service works well that will soon be widely known, as citizens will take up any good service. - Participant in the focus group with the IT professionals working in public administration institutions

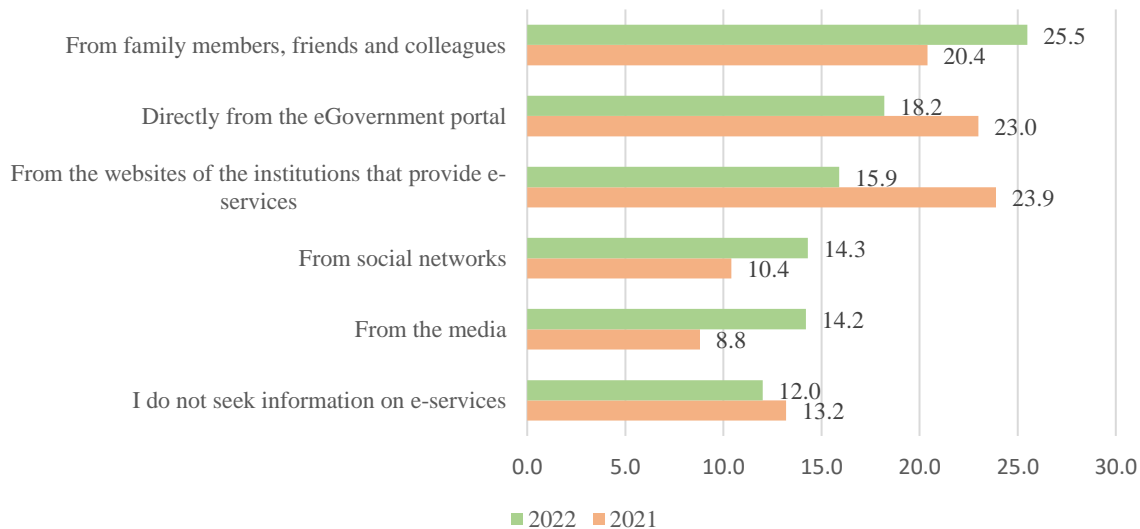
As a pensioner, I would appreciate getting text messages with information on e-services, the way I get them from my bank. - Participant in the focus group with pensioners

Some minor changes are noted in comparison with the 2021 survey, as shown in Graph 4. Greater reliance on information from family members, friends and colleagues, social networks and the media could have come as a result of the cyber-attack, when public administration portals stopped working for a while.

Graph 4. Ways of obtaining information on e-services, in %, 2021 and 2022

Up to three answers allowed

Respondent pool: Citizens who had used e-services



Broken down **by gender**, the results are as follows:

- Both male and female respondents obtained information mostly from their family members, friends and colleagues (39.6% male and 39.1% female);

- A somewhat higher share of female respondents obtained information from the eGovernment portal (29.2% female and 27.0% male);
- On the other hand, 24.3% of male respondents obtained information from the media, compared with 19.4% of female ones.

With regard to information on e-services, focus group participants shared the following suggestions for improvements:

- *Design informative short clips to be shown on TV;*
- *Introduce text messages with instructions on how to use the eGovernment portal. When launching something new, send text messages to citizens, as even pensioners have smartphones nowadays.*
- *Set up a catalogue with all e-services.*
- *I think there should be tutorials on “How to use the eGovernment website“. If it is that complicated and there is no better alternative, a video tutorial is needed. Tutorials should be shared on social networks and broadcast on TV and radio etc. to reach out to as many people who need them.*
- *Social networks provide the quickest access to information, so Montenegrin influencers should be involved. They could post relevant information on e-services on their accounts and reach out to the public. Nowadays we are likely to learn about a new coffee shop sooner than about any news on the eGovernment portal.*
- *It would help if there were supplements circulated with daily papers with instructions on accessing e-services. They should be well-designed and user-friendly.*
- *A short clip of up to 30 seconds could be broadcast with the TV commercials during reality shows, as they are the most popular.*

When asked about the reasons **why they had not used some public administration e-services**,³ the respondents provided these responses:

1. **I have not needed to – 55.9%;**
2. **I was not aware of the possibility to use them – 23.9%;**
3. I prefer direct interaction with people to electronic means – 20.7%;
4. I am not tech-savvy enough to access the services – 19.0%;
5. I am not confident that the job will get done – 15.1%;
6. I tried to but could not manage – 7.5%.

Focus group participants shared some further reasons for not using e-services more.

The problem is that e-services are being promoted, but they are not yet fully operational or complete. – Participant in the focus group with farmers

³ Up to 3 answers were allowed.

Reportedly, all services have been digitalized, but we as citizens have not seen many benefits from that, as we still need to visit the counter. - Participant in the focus group with pensioners

The 23.9% share of respondents who were unaware of the possibilities, in particular against the 9.1% share from 2021, suggests the need to find a way to ensure better information, training and awareness of the advantages of using public administration e-services. The share of those who had tried to use e-services but could not manage also increased, from 1.7% to 7.5%.

The results for **female respondents** were as follows:

- 57.2% did not need to use e-services;
- 23.7% were not aware of the possibilities;
- 19.3% were not sufficiently tech-savvy to use them;
- 12.5% were not confident that the job would get done;
- 19.8% preferred direct interaction;
- 8.3% tried to use them but could not manage.

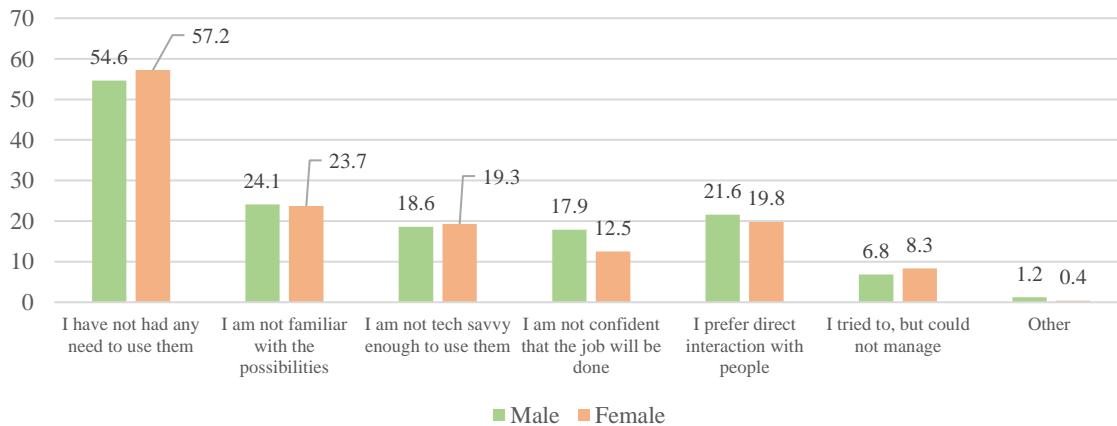
The results for **male respondents** were as follows:

- 54.6% did not need to use e-services;
- 24.1% were not aware of the possibilities;
- 18.6% were not sufficiently tech-savvy to use them;
- 17.9% were not confident that the job would get done;
- 21.6% preferred direct interaction;
- 6.8% tried to use them but could not manage.

Graph 5: Why have you not used e-services, by gender, in %, 2022

Up to 3 answers allowed

Respondent pool: Citizens who had not used e-services



Respondents were also asked to rate their satisfaction with the use of various Internet portals on the basis of their experience. The scoring system was as follows:

- 1- Completely dissatisfied
- 2- Mostly dissatisfied
- 3- Neither satisfied nor dissatisfied
- 4- Mostly satisfied
- 5- Completely satisfied
- 6- I cannot assess/ I have not used this portal.

The table shows that respondents often reported that they were neither satisfied nor dissatisfied (assigning the score of 3). Those who were satisfied prevailed over those who were dissatisfied.

On average, one in five were satisfied with the use of state institutions' portals, while on average one in eight reported dissatisfaction. The share of citizens who were satisfied with the use of state institutions' portals dropped compared with the 2021 survey, which was to be expected given the cyber-attack which occurred in 2022 and disrupted e-services for a while.

Around 51.1% of respondents reported not being able to assess their level of satisfaction or not using the portals (it was 48.0% in 2021, thus no statistically significant difference is noted).

Table 6. Satisfaction with the use of Internet portals, in %, 2021 and 2022

Respondent pool: Entire population of respondents

Scores: 1- Completely dissatisfied; 2- Mostly dissatisfied; 3-Neither satisfied nor dissatisfied; 4-Mostly satisfied; 5-Completely satisfied

	1		2		3		4		5		No use	
	2021	2022	2021	2022	2021	2022	2021	2022	2021	2022	2021	2022
eUprava	5,0	5,0	7,3	9,4	19,3	25,6	13,8	12,8	16,9	6,9	37,5	40,3
Dokumenta.me	5,3	4,4	7,3	7,6	17,7	18,3	6,7	7,5	6,0	6,0	57,0	56,1
Birači.me	6,2	5,6	6,5	6,0	16,1	18,3	10,0	9,5	8,6	9,1	52,6	51,5
EDU.me	4,9	4,8	7,2	4,8	15,2	18,8	8,6	8,0	11,0	7,6	53,2	55,9
eZdravlje	5,2	5,2	6,0	7,0	20,1	20,5	19,1	16,1	27,0	19,8	22,6	31,4
eInovacije	5,7	5,1	6,2	5,8	16,2	18,3	5,6	4,7	2,3	4,4	64,0	61,7
eServis MUP	n/a	5,6	n/a	6,0	n/a	17,4	n/a	5,2	n/a	5,2	n/a	60,7

Focus group participants commented on some portals, their design and functionality.

I use all kinds of websites and portals every day. The eGovernment one, though, resembles a forum. Everything is so impersonal and the design is not user-friendly. If we as students, presumably digitally literate, had difficulty figuring out how to apply, I can only imagine the difficulties faced by older people, since I believe you need basic digital literacy to find your way around. – Participant in the focus group with students

I used the service that allows you to check the data in the electoral roll and I could not log in. I then rang the contact number, but it was off all the time. My polling place had been changed and I had to visit all the polling places in the vicinity of my place of residence to find the new one, which took more than half a day. - Participant in the focus group with employed citizens with university education

I used eHealth to schedule an appointment with the GP and went to the Primary Healthcare Centre in Bar, where they told me that the doctor was away on a specialization course and his replacement was not in that day, so there was no one to see me although I had duly scheduled it via eHealth. I was sick and this meant a big problem for me. – Participant in the focus group with students

When you log into eHealth to schedule an appointment and your GP is unavailable you get the notification, but no explanation, and the portal automatically logs you out. Then you are compelled to go and schedule with the replacement. – Participant in the focus group with NGO representatives

I am not satisfied with the e-service used to apply for a student loan. I completed the core forms online, but had to conduct everything else in person, as it is not possible to complete the procedure online. Besides, a document was missing from my file, but no one informed me, not even by email, until the final ranking was out. That made the procedure longer than it should have been. – Participant in the focus group with students

A detailed comparative analysis (Table 7 and paragraph below) with data on the satisfaction with individual portals is provided below; the analysis excluded the respondents who could not assess their level of satisfaction or had no experience using the portals.

Table 7. Satisfaction with the use of Internet portals, in %, 2021 and 2022

Respondent pool: Only the respondents who were able to assign a score (without item 99-citizens who reported not being able to assess their level of satisfaction or not having used a portal)

Score	1		2		3		4		5	
	2021	2022	2021	2022	2021	2022	2021	2022	2021	2022
eUprava	8.0	8.4	11.8	15.8	31.0	42.8	22.2	21.5	27.1	11.5
Dokumenta.me	12.3	10.1	17.1	17.4	41.0	41.7	15.6	17.0	14.0	13.8
Birači.me	13.1	11.5	13.7	12.5	33.9	37.7	21.2	19.6	18.0	18.7
EDU.me	10.5	10.9	15.3	10.9	32.5	42.6	18.3	18.2	23.4	17.3
eZdravlje	6.7	7.6	7.8	10.2	25.9	29.8	24.7	23.5	34.8	28.9
eInovacije	15.8	13.3	17.3	15.0	45.0	47.8	15.5	12.3	6.5	11.6
eServis MUP	n/a	14.1	n/a	15.3	n/a	44.1	n/a	13.2	n/a	13.2

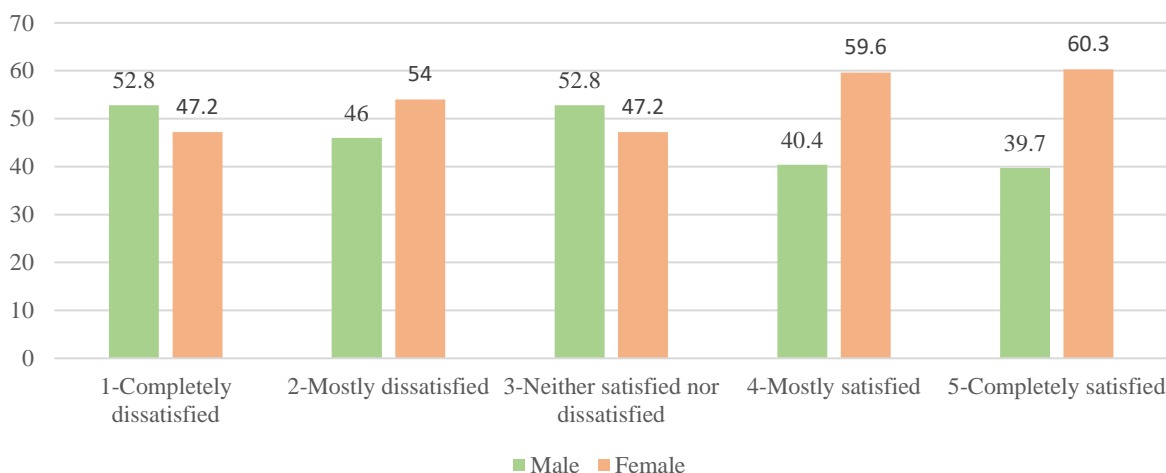
eUprava (eGovernment)

The average score for the eGovernment portal was 3.12. Overall, more than one third (33.0%) were satisfied with the portal, while 24.2% were dissatisfied.

Of the total number of respondents who gave the eGovernment portal the score of 5, which meant they were completely satisfied with it, those younger than 44 constituted the biggest share (23.3% of those aged 18-24; 26.0% of those aged 25-34 and 26.0% of those aged 35-44); followed by the respondents from the central region (more than two thirds); two thirds of those from urban areas; more than two thirds of those with university education, and households with average monthly income from €501 to €750 (26.0%).

Interestingly, 39.7% of male and 60.3% of female respondents assigned the score of 5, whereas 58.2% of male and 47.2% of female respondents assigned the score of 1.

Graph 6: Satisfaction with the eGovernment portal, by gender, 2022, in %

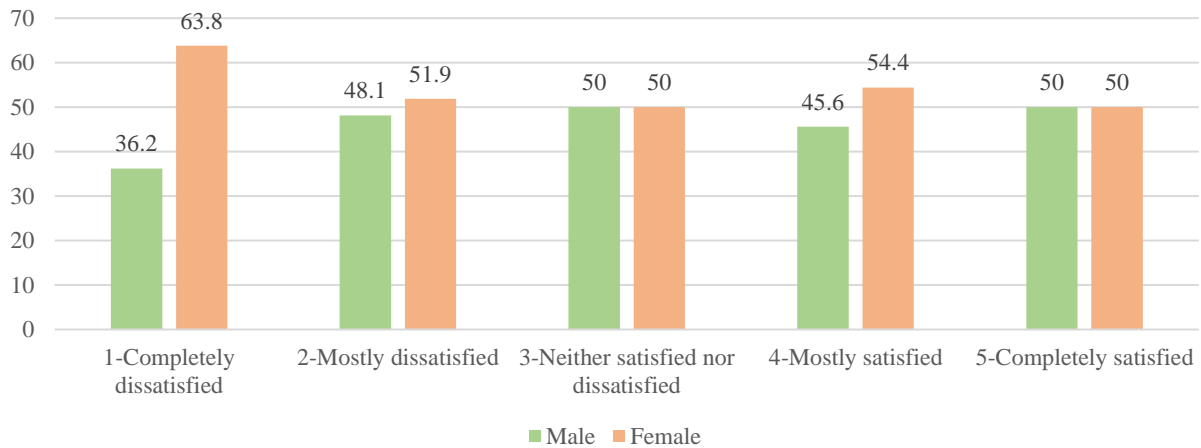


Dokumenta.me

The average score for this portal was 3.07. More than one third of respondents (30.8%) were satisfied with it, while 27.5% were dissatisfied.

The score of 5 was assigned by equal shares of male and female respondents, whereas the score of 1 was assigned by 36.2% of male and 63.8% of female respondents.

Graph 7: Satisfaction with the Dokumenta.me portal, by gender, 2022, in %



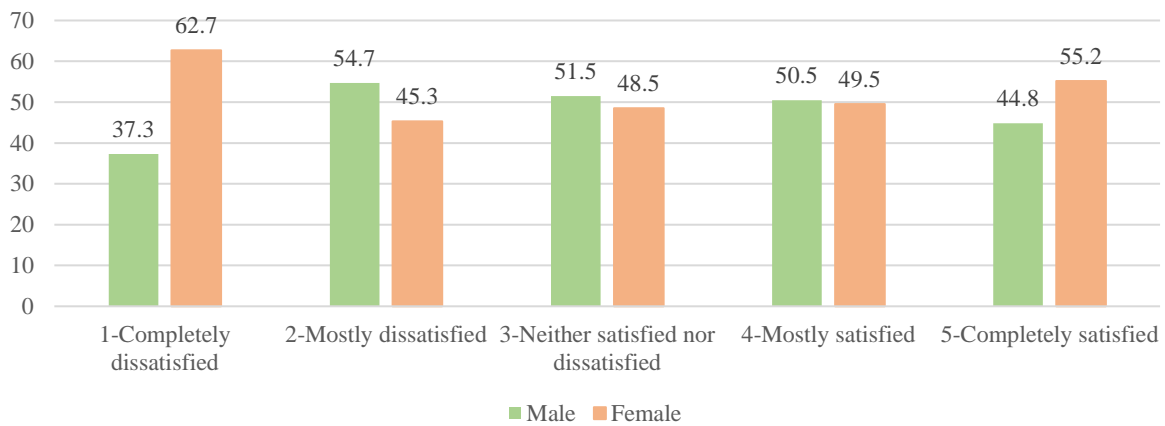
Birači.me

The average score for this portal was 3.22. Overall, almost one in three respondents were satisfied with it (38.4%), while one in four were dissatisfied (24.0%).

The score of 5 was most often assigned by the respondents aged 35-44 (almost a third – 29.2%); followed by those from the southern region; urban areas (towns); those working in the private sector, and more than two thirds of those with secondary education certificates.

The score of 5 was assigned by 44.8% of male and 55.2% of female respondents. On the other hand, the score of 1 was assigned by 37.3% of male and 62.7% of female respondents.

Graph 8: Satisfaction with the Birači.me portal, by gender, 2022, in %



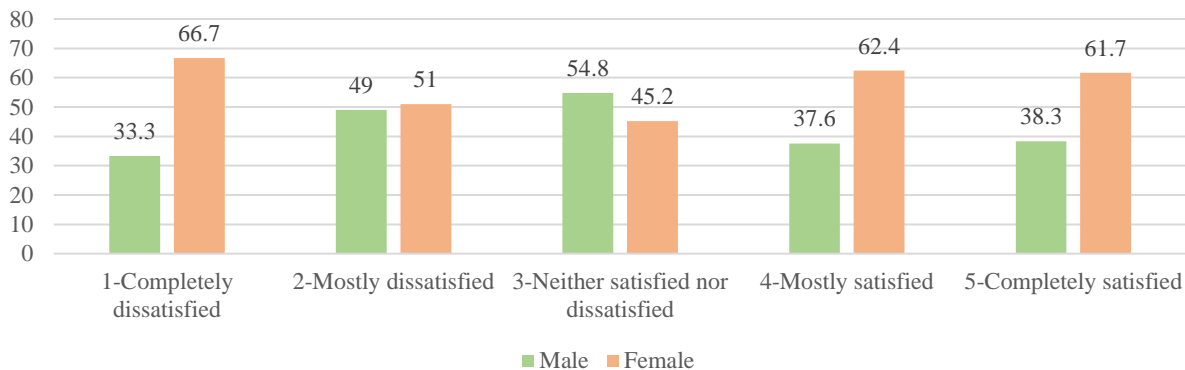
EDU.me

The average score assigned to this portal was 3.20. Almost one in three respondents were mostly or completely satisfied with the portal’s services (35.5%), whereas almost one in five were mostly or completely dissatisfied (21.8%). The portal received the best score from the respondents aged 18-24 and 34-44 (25.9% and 27.2%, respectively); those from the southern region (46.9%);

those living in urban areas (69.1%); households with average monthly income from €751 to €1,000 (32.1%), and more than two thirds of those with secondary education certificates (64.2%). Students mainly assigned the scores of 4 or 5 to this portal.

As for the gender breakdown, **38.3% of male and 61.7% of female respondents assigned the score of 5 to EDU.me.**

Graph 9: Satisfaction with the EDU.me portal, by gender, 2022, in %

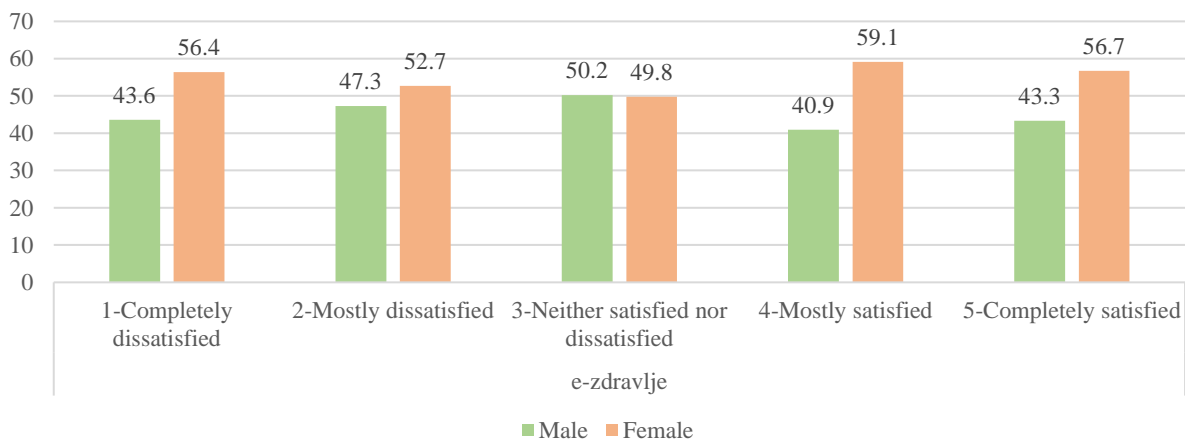


eZdravlje (eHealth)

The average score for this portal was 3.56. More than a half of the respondents who used it (52.4%) were either partially or fully satisfied with it. The portal was more frequently used by and received better scores from the respondents living in urban areas or the central region and those aged 25-34. Further efforts are needed to enhance digital literacy and information among rural population, older population, those with lower education and lower income.

Overall, the portal received the score of 5 from 43.3% of male and 56.7% of female respondents.

Graph 10: Satisfaction with the eHealth portal, by gender, 2022, in %

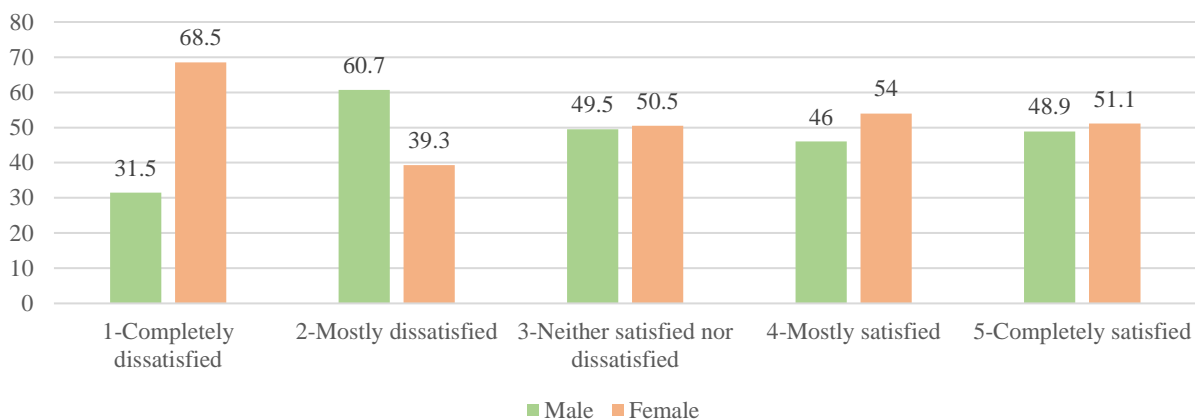


eInovacije (eInnovation)

The average score for this portal was 2.94. Overall, 23.9% of respondents were satisfied with it, while 28.5% were dissatisfied.

The share of those who reported dissatisfaction dropped in comparison with the 2021 survey; the share of those who assigned the score of 5 - and therefore were fully satisfied – rose. The score of 5 was more frequently assigned by those aged 25-44, those from the southern region, those with secondary education certificates and those working in the private sector. **Almost equal shares of those from urban and rural areas and of male and female respondents assigned the top score.**

Graph 11: Satisfaction with the eInovacije portal, by gender, 2022, in %

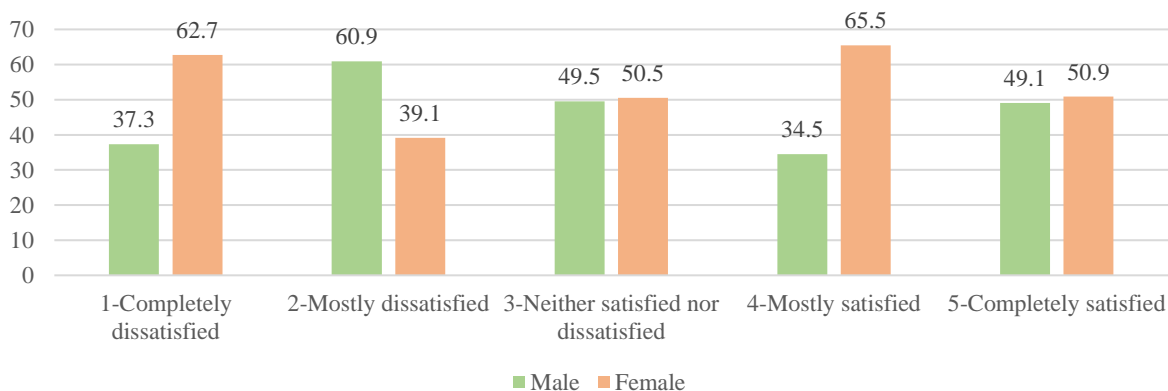


Ministry of Interior eServices

The average score for this portal was 2.95. Overall, 26.4% were satisfied with it, while almost a third were dissatisfied (39.4%).

Of the total number of respondents who assigned the score of 5, 30.5% were from the 25-34 age group. **The shares of male and female respondents who assigned the score of 5 were close to equal.**

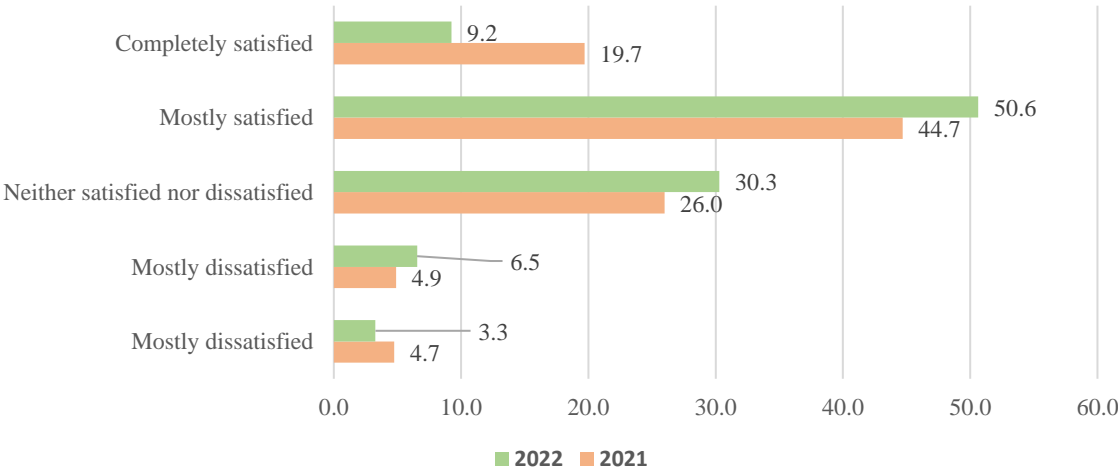
Graph 12: Satisfaction with the MoI eServices portal, by gender, 2022, in %



More than two thirds of respondents who had engaged in online communication with the public administration staff were mostly or completely satisfied with that communication (Graph 13) in 2022, just as in 2021. On the other hand, only 9.8% reported dissatisfaction with that communication, while one third were neither satisfied nor dissatisfied.

A comparison with 2021 shows a drop in the share of respondents who were completely satisfied with their online communication with public administration staff, probably due to the cyber-attack and the significant uncertainty around operation and provision of responses to citizens.

Graph 13. Satisfaction with online communication with public administration staff, in %, 2021 and 2022
Respondent pool: Entire population of respondents



Since I could not use eHealth to check which tests I needed to schedule an ultrasound, I tried calling them on the phone, but had no success and needed to visit them in person. When I approached the counter, I saw the clerk talking on the phone, the landline handset placed on the desk, off-hook. – Participant in the focus group with pensioners

In smaller municipalities you know everyone and you get what you need over the phone or by going there in person, but you don't need to spend time in queues. – Participant in the focus group with farmers

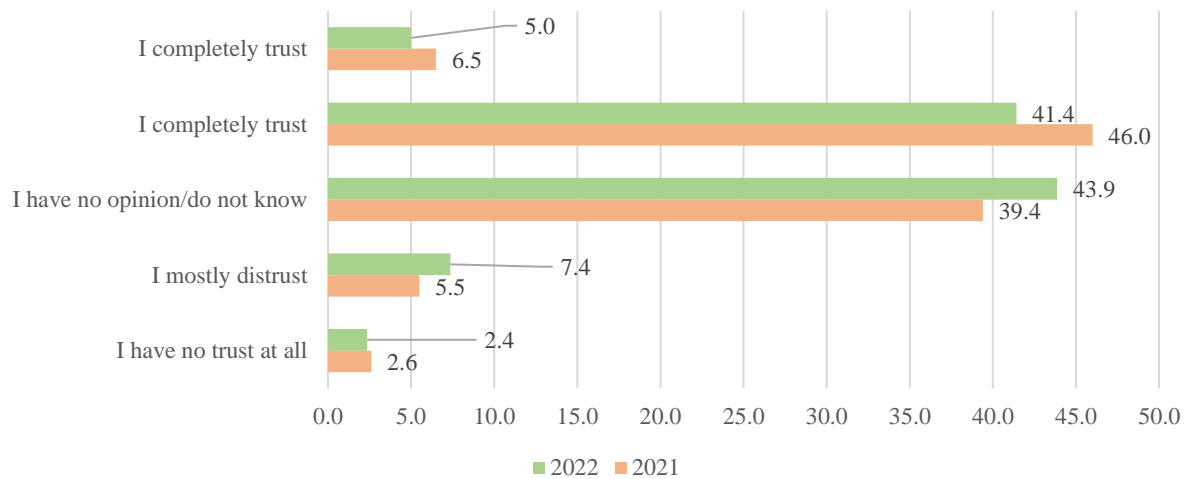
In addition to their level of satisfaction with the online communication, citizens were asked to report their level of trust in the security of public administration services.

Almost one half of respondents (46.4%) trusted the security of public administration e-services, while 2.4% had no trust.

Male respondents reported an increased level of trust than female ones, with 54.7% and 45.3% respectively fully trusting the security of public administration e-services. Younger respondents showed more trust than those older than 45.

Graph 14. Trust in the security of public administration e-services, in %, 2021 and 2022

Respondent pool: Entire population of respondents



The respondents who reported no trust were asked to provide the reasons. The ones they most frequently shared included:

- ✓ No trust in electronic service delivery – 25.2%;
- ✓ Previous negative experience – 17.5%;
- ✓ Preferring to get business done in person – 13.6%;
- ✓ No trust because of data abuse – 11.7%;
- ✓ No confidence that they have skilled IT professionals – 9.7%;
- ✓ No experience with e-services – 3.9%;
- ✓ Being e-illiterate – 1.9%;
- ✓ Webpages not sufficiently developed – 1.0%;
- ✓ Unable to assess – 15.5%.

The focus group discussions provided further insight into the level of trust in public administration e-services.

I don't understand why trainees have to deliver monthly reports in person. When I asked the Employment Agency why that was not digitalized, they said they were afraid of data theft and hacking and that they practised that only during the COVID-19 pandemic. I think it would be easier for both sides if the service were digitalized, as just a couple of clicks would take you to the data you need. – Participant in the focus group with students

2.5. Advantages of public administration e-services and suggestions for improvement

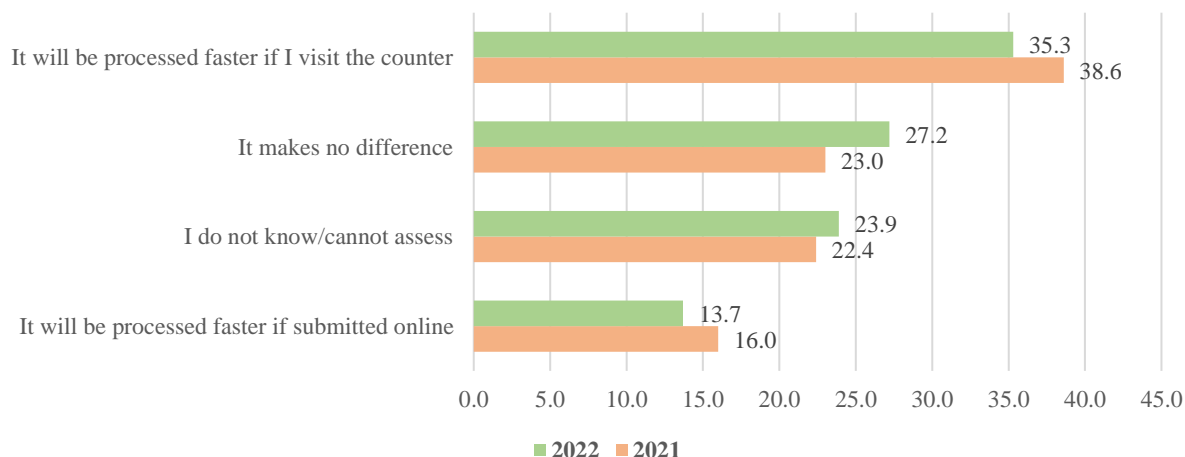
With regard to the submission of applications, **a bigger share of respondents thought that their application would be processed faster if submitted in person than if submitted online** (Graph 8).

A comparison with the results of the November 2021 survey shows a drop in the share of respondents who thought that their application would be processed faster if submitted in person,

from 38.6% to 35.3%. A comparison of the data on those who preferred online submission and those who thought it made no difference suggests the **need for additional information to be provided to citizens, but also that public administration staff should be highlighting the advantages of online submission more (shortens the time, reduces the costs etc.)**.

Graph 15. Preferred method of applying – online or in person, in %, 2021 and 2022

Respondent pool: Entire population of respondents



More female respondents thought that their application would be processed faster if submitted in person.

The younger population was more likely to think that an application would be processed faster if submitted online (22.1% of those from the 18-24 age group and 28.3% of those from the 25-34 age group), along with the respondents from the central (33.8%) and southern region (48.3%) and those from urban areas (66.2%). Those with lower education levels thought that an application would get processed faster if submitted in person (almost a half of respondents). Broken down by profession, more than one third of respondents working in the public sector shared the same opinion, together with one half of pensioners and two thirds of farmers.

Focus group participants thought better uptake of e-services required feedback on the process that follows after logging in and using a portal.

When I used the website for the traineeship programme, I was not sure whether I managed to apply successfully, as the website, once I completed the application, automatically sent me back to the homepage without notification of successful application. I had no idea whether I managed to apply at all. I had completed the required form and it just disappeared. I then had to send an email to eGovernment to get feedback on my application. – Participant in the focus group with students

Citizens must be informed whenever there are problems with the website as well as when they have been fixed. – Participant in the focus group with the IT professionals working in public administration institutions

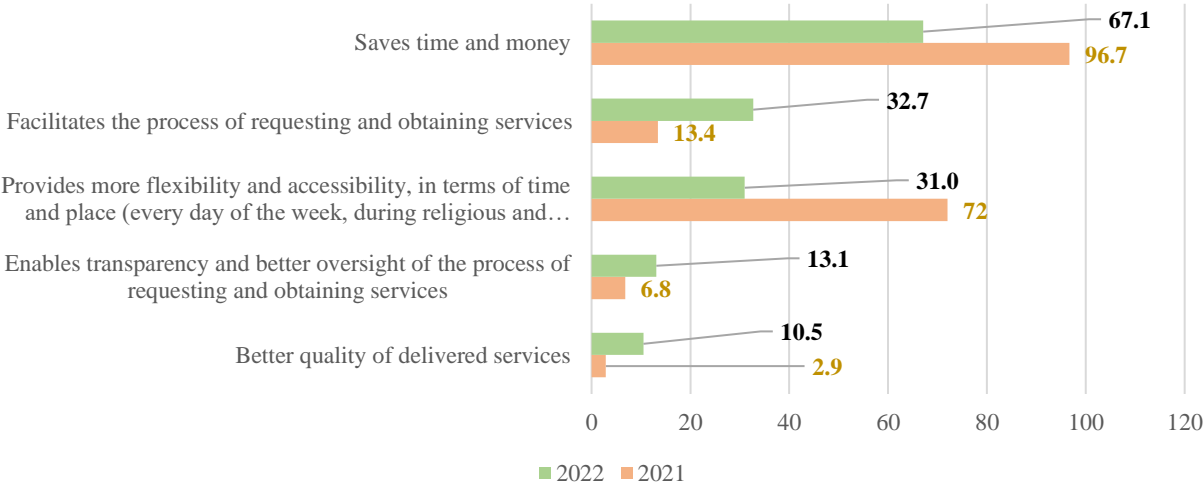
Citizens were also asked to report the advantages of public administration e-services over other forms of communication (in person, by phone).

In total, 67.1% of respondents thought that public administration e-services saved time and money. More than one third (31.0%) thought that they provided more flexibility and accessibility, in terms of time and place (every day of the week, during religious and national holidays). More than one third, i.e. one in three thought that e-services made the process of requesting and obtaining a service easier (32.7%). The other reported advantages were: transparency and better oversight of the process of requesting and obtaining a service (13.1%) and better quality of delivered service (10.5%).

The Graph below shows the data for 2021 and 2022 and outlines the shift in respondents’ opinions during the period of 12 months.

Graph 16. What are the advantages of public administration e-services over other forms of communication (in person, by phone), in %, 2021 and 2022

Respondent pool: Entire population of respondents, up to 3 answers allowed



The breakdown by gender does not reveal any major differences in the responses concerning the advantages of e-services over other forms of communication. Female respondents were slightly more likely to think that e-services provided more flexibility and accessibility and facilitated the process of requesting and obtaining a service.

To enable a complete shift to e-services, however, it is necessary to ensure their completeness.

Not one of the e-services is fully functional. You can download the form from the website, but you still have to submit it in person. – Participant in the focus group with NGO representatives

We have completed some e-services, but a key thing is still missing: citizens still have to come and submit the payment slip, and that annuls all the other advantages granted by online submission. – Participant in the focus group with the IT professionals working in public administration institutions

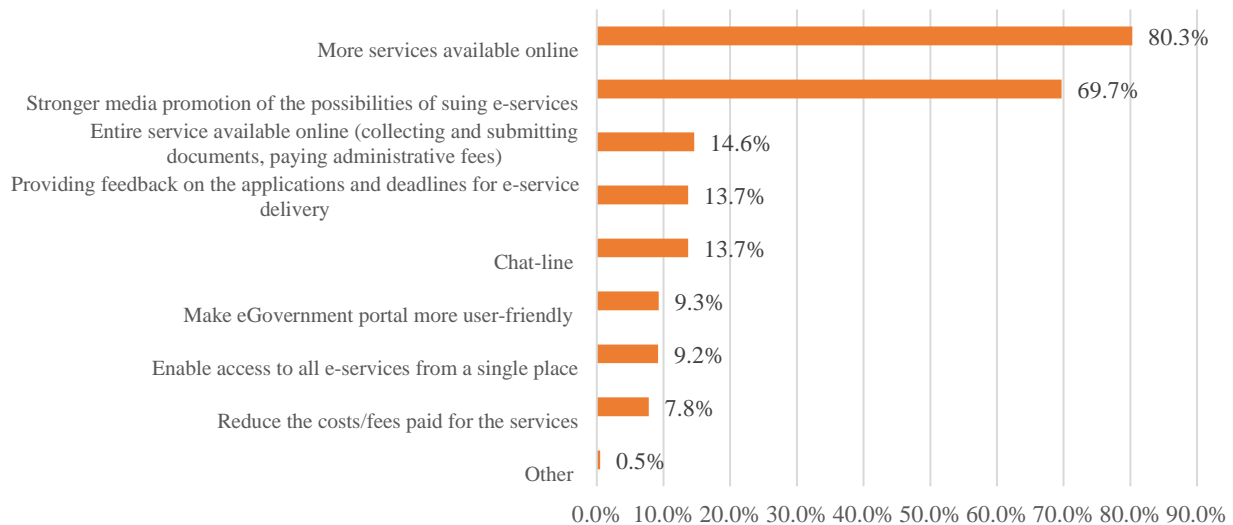
Citizens perceive public institutions and traditional visits to the counter as a form of guarantee that the entire service will be completed. -- Participant in the focus group with the IT professionals working in public administration institutions

With regard to the changes citizens expected to see in order to make more use of e-services, **four fifths (80.3%) thought that increasing the number of services available online would help boost the uptake. Also, two in three (69.7%) thought that stronger media promotion of the possibilities of using e-services was required. The ranking of the suggestions/recommendations matches that from the 2021 survey.**

Graph 17. The changes required to boost the uptake of e-services, in %, 2022

What would need to change first for you to use e-services (more)?

Respondent pool: Entire population of respondents, up to 3 answers allowed



The breakdown by gender shows no significant statistical difference.

Besides the changes that would be required for better uptake of e-services, respondents also stated a number of public administration services that they would like to access exclusively online in the future. Graph 18 below shows the ones mentioned by most respondents.

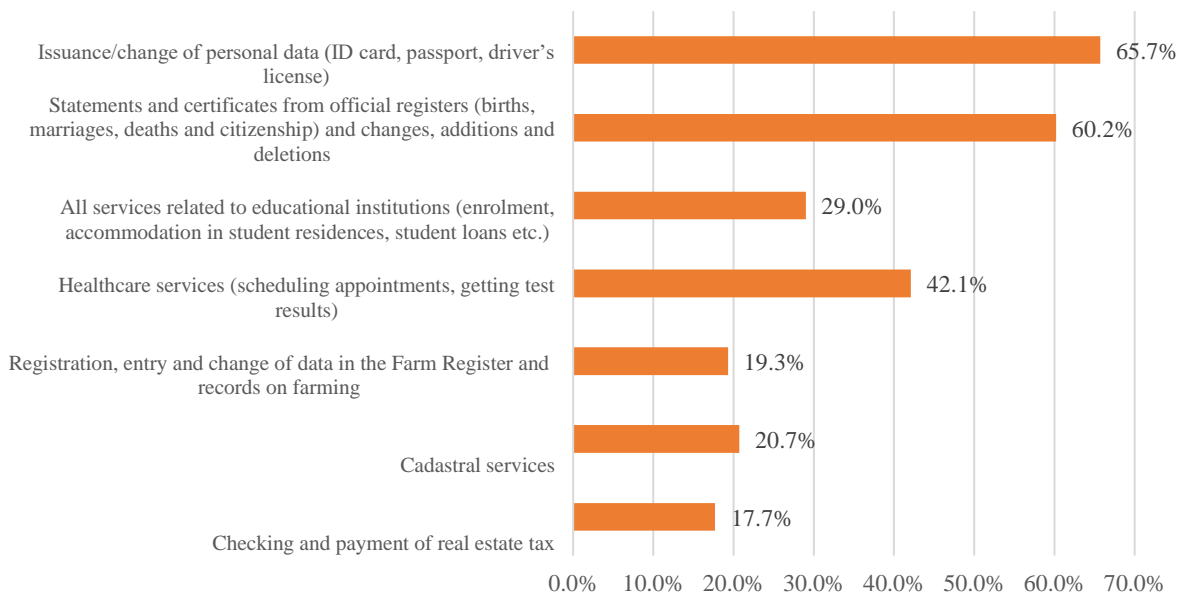
The biggest share of respondents (65.7%) wanted to be able to obtain or modify personal data (ID card, passport, driver’s license) online. They also wanted to be issued certificates from official registers (birth, marriage, death and citizenship), and to be able to enter changes, additions or delete data (60.2%) online. Although healthcare services were largely

available online, a **significant share of respondents (42.1%**, more details in Graph 18 below) stated **that they would like to schedule appointments and access lab test results via e-services**. Almost one third (29.0%) would like all services related to educational institutions (enrolment, scholarships etc.) to be provided only in online format.

The ranking of priorities remained very similar to the one from the 2021 survey.

Graph 18. Suggestions for future e-services, in %, 2022

Respondent pool: Entire population of respondents, up to three answers allowed



The breakdown **by gender** shows differences only in the answers concerning **the services related to educational institutions and professional exams for the civil service, as more female respondents preferred the “online only” option**. On the other hand, more male respondents preferred that option in relation to **cadastral services and registration of building/regularization of built structures**.

The focus group participants’ inputs cited below refer to the introduction of new e-services and adaptation of the existing ones, in particular to be used by persons with disabilities.

It would help if we could get lab test results online, without having to visit the GP.

The institutions are not connected. It would be ideal if the civil servant could have a complete file in a single place, with my identification number as reference, so I do not need to visit one institution after another. We pensioners are older people after all and those things exhaust us. We always end up visiting one counter after another to get anything we need!

– Participants in the focus group with pensioners

Information on public transport is in dire need of digitalization. When we travel abroad we see how well-organized their public transport is. We have no information about how far a bus may be or bus times. – Participant in the focus group with employed citizens with university education

The existing e-services should be redesigned to be much easier and better suited to daily use. We all feel uncertain about service delivery because the website is not user-friendly. – Participant in the focus group with students

In reality, when a person with a disability wants to access a right attached to his/her status, he/she has to obtain the same set of documents every time, sometimes even from the same authority, has to obtain the certificates, get photocopies, visit the institutions which are often not accessible and ultimately submit everything in person.

I would recommend organizing training for persons with sight impairments or disabilities, as each e-service is specific and requires some adjustment. Someone with a sight or hearing impairment cannot call the Call Centre or request medicines via eHealth; all they can do is go there and wait for a couple of hours. For instance, eHealth could be upgraded to track the scheduled appointments with your GP.

– Participants in the focus group with persons with disabilities

It would be better to have two high-quality services that work well and that people slowly begin to take up than having 500 of them and not one working properly. – Participant in the focus group with NGO representatives

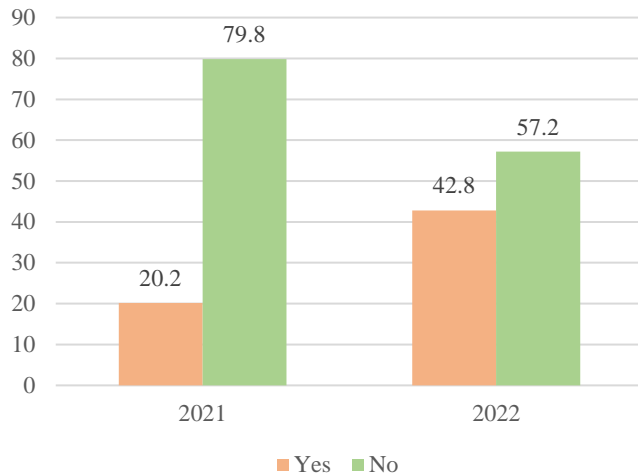
2.6. Use of the new ID card

Four out of ten of all respondents covered by the survey possessed a new electronic ID card (eID). A significant increase is noted in the number of citizens using the eID in comparison with the November 2021 survey: at that time, only 20.2%, or one in four citizens had an eID, against 42.8% in December 2022.

The breakdown by gender shows a somewhat higher share of male respondents who had the eID (43.3% of male and 42.4% of female respondents). A further breakdown shows that most of those who had the eID were from the 25-34 age group, central or southern region, had secondary or university education and worked in the private sector.

Graph 19. Possession of a new electronic ID card, in %, 2021 and 2022

Respondent pool: Entire population of respondents



74.2% of the respondents who had the eID had activated it. In 2021, that share was 56.7%.

Those who had the eID but had not activated it stated the following main reasons:

- ✓ I do not know how to activate it – 38.3%;
- ✓ I do not understand what it could be used for – 38.3%;
- ✓ I have not secured a reader – 18.8%.

Focus group participants highlighted that the eID was not easy to activate and was not properly recognized or promoted.

There are many advertisements on social networks about the benefits of using the eID. However, to activate it you need to have a mobile device and it is quite complex to use, even for people who qualify as digitally literate to update software. As a physical person, you have access to just three or four services and then, naturally, that backfires. – Participant in the focus group with NGO representatives

My father is a pensioner and he has activated his eID. When he needed to use it at the Primary Healthcare Centre, he was told that he still needed to get a paper health card on top of it. - Participant in the focus group with employed citizens with university education

2.7. Familiarity with eParticipation and ePetition

eParticipation

One in six respondents were familiar with the eParticipation portal, but had never used it. On the other hand, more than two thirds of citizens were not familiar with this portal (62.1%).

4.0% of citizens knew about the portal and always used it; this was an increase in comparison with the 2021 survey, when 2.6% of respondents used the portal. There was also an increase in the share of citizens who knew about the portal and used it occasionally, namely from 5.6% to 8.8% in 2022.

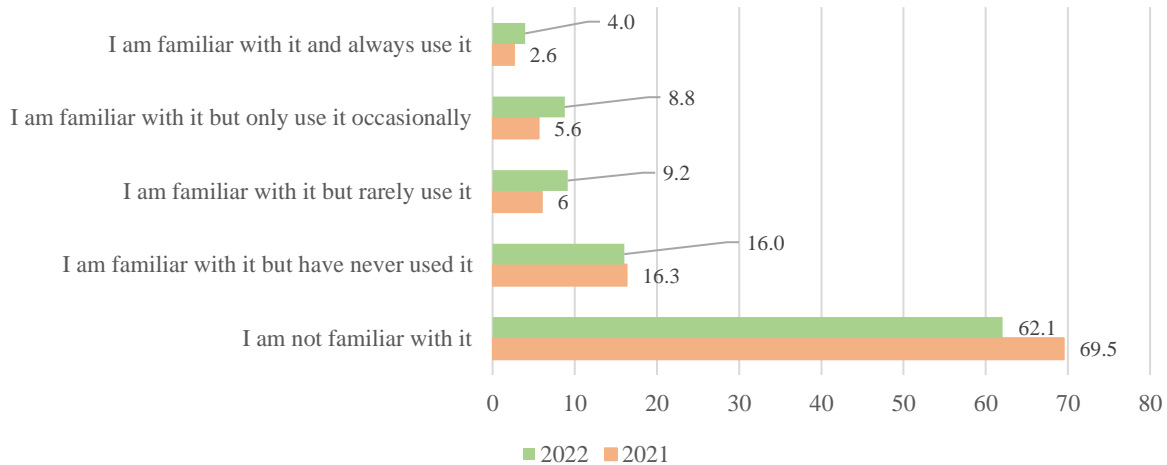
Overall, almost one in five respondents knew about the portal, irrespective of whether they used it or not. Breakdown by gender shows that **more female respondents knew about the portal but**

rarely used it (52.6% versus 47.4% of male ones). **Male respondents prevailed in the group of those who knew about the portal and always used it (64.3% versus 35.7% of female ones).**

Those who knew about the portal mainly belonged to younger population, had secondary or university education and came from urban areas. Breakdown by profession shows that this group included mostly those working in private and state companies and institutions.

Graph 20. Familiarity with and use of the eParticipation portal, in %, 2021 and 2022

Respondent pool: Entire population of respondents



Those who reported that they used the portal rated also their level of satisfaction with it. **More than two thirds were satisfied (6.7% completely satisfied and 51.1% mostly satisfied).** Only **3.7% reported dissatisfaction with the portal (2.2% completely dissatisfied and 1.5% mostly dissatisfied).**

Almost one in four respondents could not rate their level of satisfaction with the portal.

Gender breakdown shows that, of the total number of male respondents who knew about the portal and used it always or occasionally: 46.7% were mostly satisfied; 10.7% were completely satisfied, while 24.0% were neither satisfied nor dissatisfied. Only 1.3% stated they were mostly dissatisfied.

The breakdown of the results for female respondents is different: 56.7% were mostly satisfied; 25.0% neither satisfied nor dissatisfied; 1.7% completely satisfied, and 1.7% mostly dissatisfied.

ePetition

The ePetition portal enables citizens' voice to be heard and their proposals or demands to be presented for decision-making with the aim of solving a problem in communication or cooperation with public administration. **One in six respondents knew about it, but had never used it.**

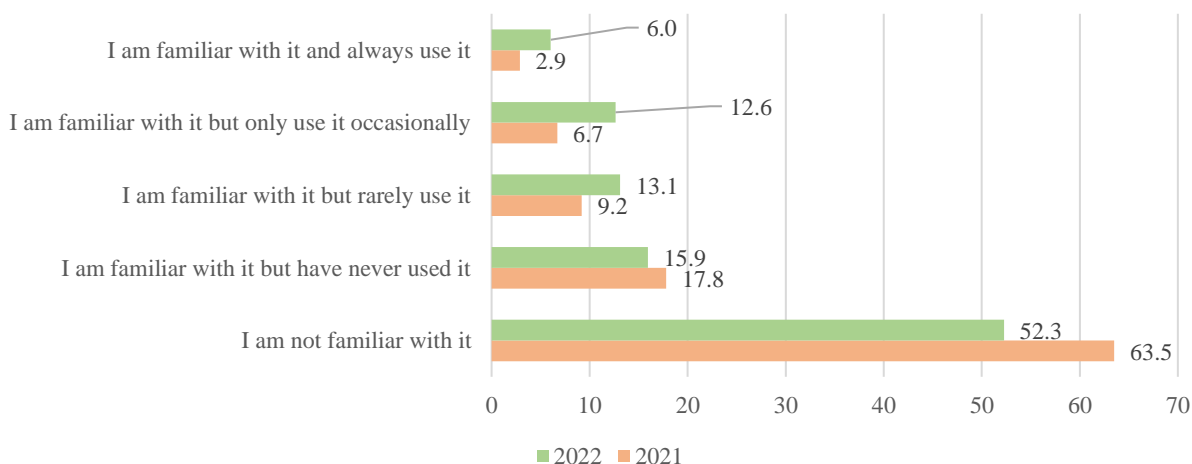
6.0% of respondents were fully aware and always used the portal, which was an increase compared with the 2.6% from the November 2021 survey.

Around one half of citizens were not familiar with the portal (52.3%), which was a drop compared with the 63.5% from the November 2021 survey.

Breakdown by gender shows that more male respondents were aware of the portal and used it. The 25-44 age group was more aware than the older respondents. Familiarity and use were stronger in the southern and northern regions of Montenegro and in urban areas. Entrepreneurs and employees of state institutions and the private sector tended to be more aware, while those with lower education level or no formal education were practically unaware of the portal (88.9%).

Graph 21. Familiarity with and use of the ePetition portal, in %, 2021 and 2022

Respondent pool: Entire population of respondents



The respondents who reported that they used the portal also rated their level of satisfaction with it. **Close to two thirds were satisfied** (51.1% were mostly satisfied and 6.7% completely satisfied).

75.8% of respondents were satisfied with the portal (28.3% completely and 47.5% mostly satisfied). Only **1% reported that they were dissatisfied with the portal.**

One in five could not rate their level of satisfaction with the portal, while one in seven could not assign a score (neither satisfied nor dissatisfied).

The share of citizens who were satisfied with the ePetition portal increased in comparison with 2021.

Breakdown of the results on the level of satisfaction with the portal **by gender** is as follows:

- Of the total number of male respondents who knew about the portal and used it always or occasionally: 42.4% were mostly satisfied; 31.3% were completely satisfied, and 16.2% were neither satisfied nor dissatisfied. In total, 1.0% reported being completely or mostly dissatisfied.
- Of the total number of female respondents, 52.5% were mostly satisfied; 11.1% neither satisfied nor dissatisfied; 25.3% completely satisfied, and 1.0% completely or mostly dissatisfied.

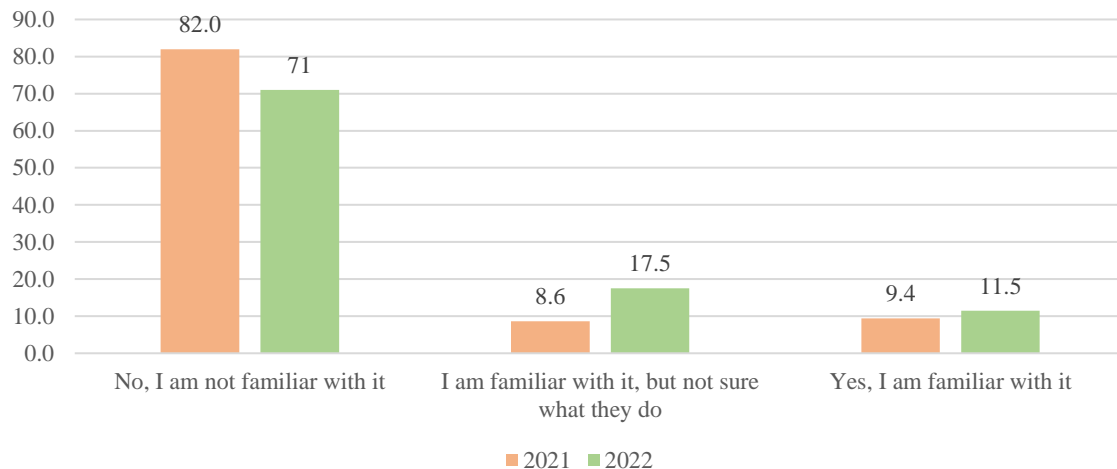
- 9.1% of male and 10.1% of female respondents reported they were indecisive, as they could not assess.

2.8. Familiarity with digital nomads

One in ten, i.e. 11.5% of respondents were familiar with the term and knew what digital nomads did, while 17.5% were familiar, but not sure what digital nomads did. Slightly less than three quarters did not know who digital nomads were (71.0%).

Graph 22. Familiarity with the term “digital nomads”, in %

Respondent pool: Entire population of respondents



In comparison with the 2021 survey:

- ✓ **The share of citizens who were familiar with the term and knew what digital nomads did increased;**
- ✓ **The share of citizens who were familiar with the term but not sure what digital nomads did increased;**
- ✓ **The share of citizens who did not know who digital nomads were declined.**

More female respondents were familiar with the term “digital nomads” and what digital nomads did or how they organized their work. In addition, those younger than 44 were more familiar than the older ones, followed by those with university education, and employees of public and private companies and institutions.

Those who said they were familiar with the term were asked to explain its meaning:

- ✓ **Of the total number of respondents who reported familiarity with the term “digital nomads”, one in three could not explain what it meant;**
- ✓ **8.6% said that digital nomads were “people who worked online and had no fixed office or workplace“;**
- ✓ **4.3% said that digital nomads were “people who worked using the Internet from anywhere in the world“;**

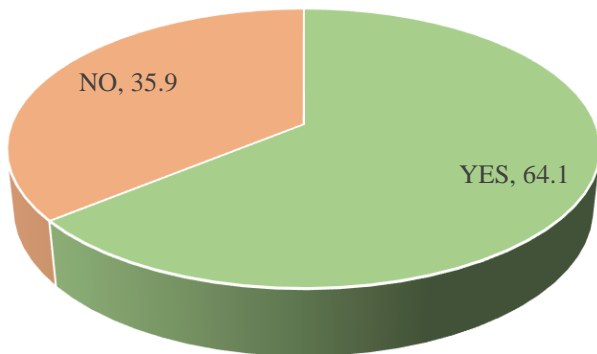
- ✓ 2.3% said they were “IT professionals“.

2.9. The cyber-attack

Of the total number of respondents, **64.1% knew about the August 2022 cyber-attack.**

Graph 23. Familiarity with the cyber-attack, in %

Respondent pool: Entire population of respondents



Female respondents were more aware of the cyber-attack, as well as those aged 25-34, from the central region and those from urban areas.

24.5% of those working in state institutions were not aware of the August 2022 cyber-attack, together with 51.7% of entrepreneurs.

This is the first time I've heard about it. What is a cyber-attack? – Participant in the focus group with students

Those who were aware of the cyber-attack were asked to report the consequences that affected them:

- ✓ 45.2% said they could not access the services provided by public administration;
- ✓ 32.5% felt a slowdown in the use of the services provided by public administration;
- ✓ 28.3% said they could not access timely information;
- ✓ 28.0% felt a slowdown in their own work.

The e-services that citizens were most prevented from accessing due to the cyber-attack were the following:

1. Issuance of personal documents – 33,1%;
2. Health insurance services, such as medical panels, prescriptions, information on the availability of medicines and accessing the rights pertaining to health insurance – 29.7%;
3. COVID-19 – getting test results and digital Covid certificates – 21.4%;
4. Applications, certificates and forms issued by the Capital City, Royal Capital and local governments – 20.8%.

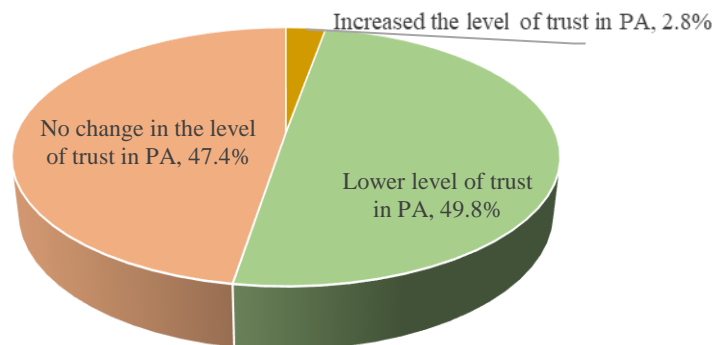
Due to a lack of access to e-services, almost two thirds of citizens (56.6%) visited institutions to get something done. 23.2% rang to find out when e-services would be available again. The results broken down by gender match the results for the group, i.e. the entire population.

Most citizens **did not incur any costs (86.7%) that would increase their expenses due to the cyber-attack**, whereas one in eight did. Those who incurred costs stated, in equal shares (50%), the following two reasons: they could not exchange emails with the public authorities' staff, but had to visit institutions or ring them several times to get information, and they visited institutions several times to get certificates/documents that they used to download earlier.

For almost one half of respondents (49.8%), the cyber-attack impacted a decline in their trust in public administration. Only 2.8% reported that their trust in public administration increased following the attack, while **47.4% reported no change in their level of trust.**

Graph 24. Cyber-attack impact, in %

Respondent pool: The population of respondents who were aware of the cyber-attack, n=679



Broken down by gender, of the total numbers of female and male respondents who were aware of the attack:

- 48.3% of female and 51.4% of male respondents reported a lower level of trust in public administration;
- 49.1% of female and 45.6% of male respondents reported no change in their level of trust in public administration;
- 2.6% of female and 3.1% of male respondents reported an increased level of trust in public administration.

Focus group participants provided further inputs on the impacts and consequences of the cyber-attack.

The staff at public institutions refuse to use emails the way they did before the cyber-attack, as they lost them due to the attack. Email works now, but they have introduced a system of multifactor identification for logging in, as a form of protection from another cyber-attack. The procedure is quite demanding, as it involves several steps, and the staff are concerned that they may lose their email messages once again. That's why they prefer in-person communication and business. – Participant in the focus group with employed citizens with university education

The cyber-attack made us lose our trust in institutions, as we can no longer say whether our emails arrived or got lost and we get no feedback from them, either by phone or email.

– Participant in the focus group with NGO representatives

There is a lot of discontent due to the cyber-attack, as we have a double workload to handle. Enrolment in schools and kindergartens is about to start in April, but all electronic services that were developed over the previous period have to be “rebooted“. The staff are focusing on solving that problem and cannot work on new e-services. – Participant in the focus group with the IT professionals working in public administration institutions

III KEY FINDINGS OF THE SURVEY

- More than a half of respondents were familiar with the e-services provided by public administration.
- There was an increase in the number of respondents who were familiar with e-services but knew practically nothing about them, compared with the 2021 survey.
- 40.6% of citizens used e-services every day, several times a week or several times a month. In 2021, that share was 46.4%.
- A decline in online shopping, but also a slight decline in online learning, was noted following the Covid-19 pandemic. A decline in Internet use for gaming and online gaming purposes also presented a positive change; it was encouraging that, irrespective of the frequency of use, the number of e-banking users rose in comparison with 2021.
- Three quarters of respondents were mostly or completely satisfied with public administration e-services, similarly to the survey conducted one year before.
- Most respondents obtained information about e-services from their social circle (family members, friends, colleagues), whereas in 2021 they obtained them from the webpages of the institutions that provided e-services. Greater reliance on information from family members, friends and colleagues, social networks and the media could have been the consequence of the cyber-attacks that disrupted the portals, some of which have still not fully resumed operation.
- One in five citizens obtained information via the eGovernment portal.
- 23.9% of respondents were not familiar with the possibilities of using e-service, which was an increase compared with 9.1% in 2021. This suggests the need for continuous efforts to inform and train people and make them aware of the advantages of using public administration e-services.
- One in five respondents were satisfied with various Internet portals of state institutions. The share of citizens who were satisfied with those portals dropped compared with 2021. This was to be expected, given the cyber-attack that occurred in 2022 and made various e-services unavailable for a while.

- More than two thirds of the respondents who had engaged in online communication with public administration staff were mostly or completely satisfied with that communication in 2022, as in 2021.
- Almost one half of respondents trusted in the security of public administration e-services.
- The number of citizens who thought that their application would be processed faster if submitted in person dropped in comparison with 2021.
- More than two thirds of respondents thought that public administration e-services saved time and money.
- One in three respondents thought that e-services facilitated the process of requesting and obtaining services.
- Two out of three respondents thought that stronger media promotion of the possibilities of using e-services was required.
- Most respondents wanted the issuance and modification of personal documents to be available online in the future.
- The number of citizens who used eID and the number of those who had activated it increased compared with the earlier survey.
- One in six respondents were familiar with the eParticipation portal but had never used it, similar to the result of the 2021 survey.
- The number of citizens who were familiar with the ePetition portal increased compared with 2021; however, a significant number of them were still not familiar with them, suggesting the need for stronger promotion of the portal.
- The number of citizens who knew about digital nomads increased compared with the 2021 survey.
- 64.1% of respondents knew about the cyber-attack from August 2022.
- Due to not being able to access e-services, almost two thirds of respondents visited institutions in person to conduct their business,.
- The cyber-attack did not affect the trust of 47.4% of citizens in public administration, while 49.8% reported that it had eroded their trust.