GovTech / E-governance Global Industry Landscape Overview 2019

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GovTech / E-governance Global Industry Landscape Overview 2019

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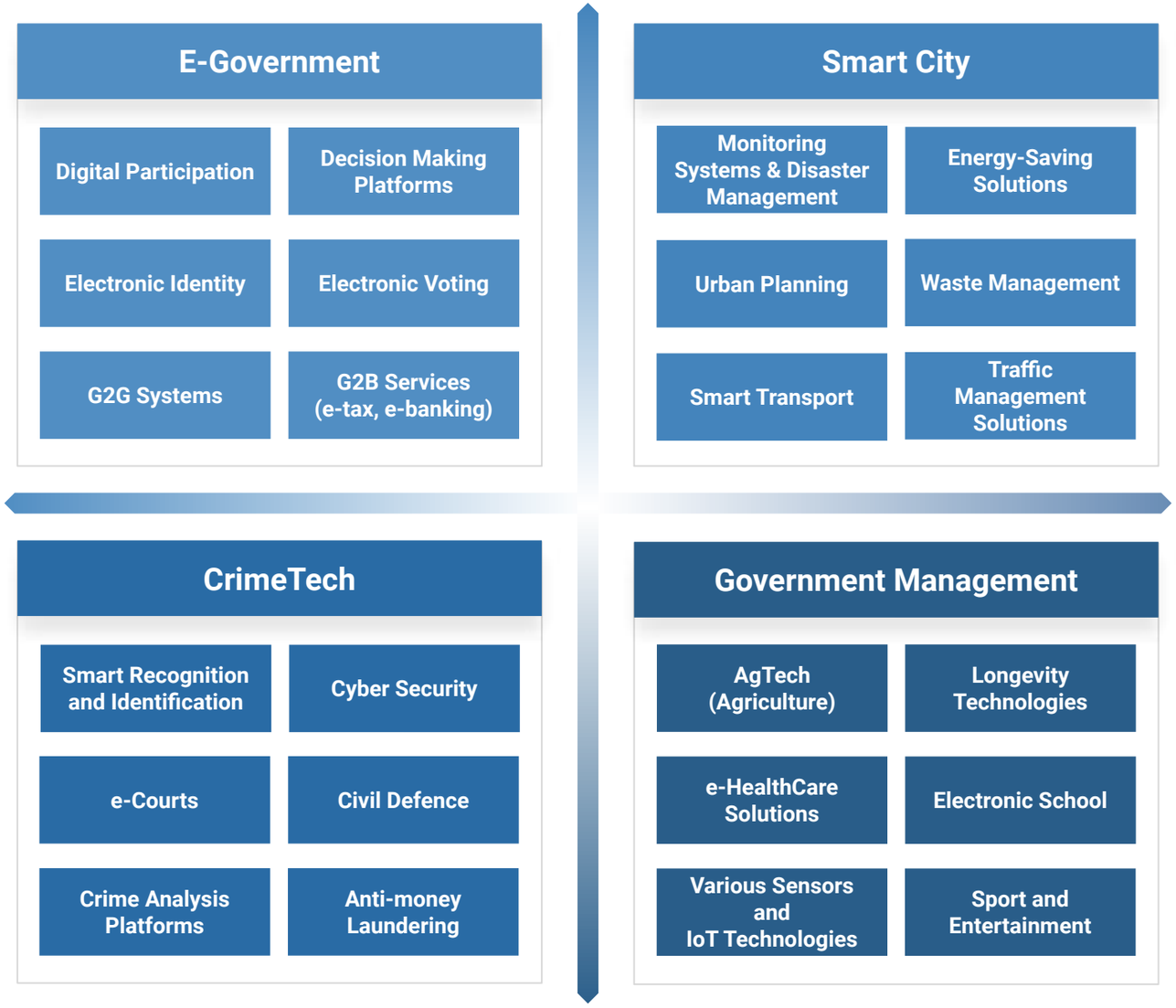
GovTech and E-governance Global Industry

"GovTech / E-governance Global Industry Landscape Overview 2019" is a 160-page open access report that is used to provide a broad analysis of the trajectory of the GovTech industry by focusing on factors driving the ongoing transformation of a state, main sectors to be changed, barriers to this process and ways to overcome them. It also provides information on the main types of technologies used by GovTech including blockchain, AI and machine learning, IoT, robotic automation, and geospatial data analysis, with emphasis on the best examples of their implementation including decrease of time and complexity in public-private information exchanges, reduction of bureaucracy and corruption, improvement in automation, transparency, and accountability of information.

The report reviews **100 GovTech companies** based in different regions and **350 investors in GovTech industry**. **15 GovTech and Smart City tech hubs**, **30 journalists and 40 influencers** are also presented in the report. The report also is investigated the achievements in GovTech adoption in 30 countries worldwide focusing primarily on the developing countries that, due to the circumstances, could not or could only partially embark on a course of public administration automation.

The report emphasizes increasingly big market opportunities for companies currently operating with GovTech technologies and for startups that want to enter the market worldwide. In economic terms, GovTech industry is estimated to be worth $1 trillion per year by 2025. The future of GovTech market depends upon governments creating a sustainable ecosystem for effective collaboration with tech startups.

By analyzing current technological and media trends in GovTech, presenting the overview of e-government and GovTech development models, and highlighting the barriers in the way of GovTech adoption the report is able to identify the key drivers of GovTech transformation in developed and developing countries, pick out the state, business and citizens benefits, and offer recommendations considering what has to be done to develop a healthy ecosystem for efficient collaboration between government and GovTech firms.



GovTech / E-governance Global Industry Landscape Overview 2019

Companies - 100
Investors - 350
Tech Hubs - 15

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40 GovTech Influencers

Alyssa Broomby, Digital Transformation Agency

Amit Narayan, Autogrid

Andrea Leadsom, Department for Business, Energy & Industrial Strategy

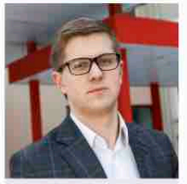
Andy Beale, UK´s Cabinet Office

Anna-Maija Karjalainen, Public Sector ICT Ministry of Finance

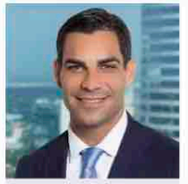
Arturo Herrera Gutiérrez, Ministry of Finance and Public Credit

Danilo Astori, Ministry of Economy and Finances

Eduard Müller, Federal Ministry of Finance



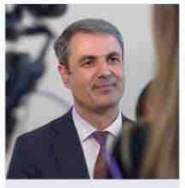
Erki Lipre, Ridango



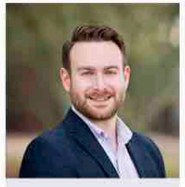
Francis Suarez, City of Miami

Hon Kris Faafoi, Ministry for Government Digital Services

Huiyi Lee, Facebook



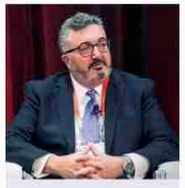
Ibrahim Baylan, Ministry of Enterprise and Innovation



Ilya Rekhter, DoubleMap

Jackson Mthembu, Department of Communication and Information System

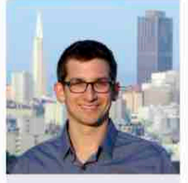
Jacqueline Poh, Government of Singapore



Jason Hare, Jason M. Hare Associates INC.

Jimmy Martin, AMCS Group

John Chen, BlackBerry



Jonathan Simkin, Swiftly

Joshua Wong, Opus One Solutions

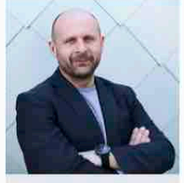
Julia Glidden, Microsoft

Konstantin Noskov, Ministry of Digital Development, Communications and Mass Media

Konstantin Shulgan, The Ministry of Communications and Informatization

Lena Goh, Singapore GovTech Agency

Luis Felipe Salin Monteiro, National Secretary of Information and Communication

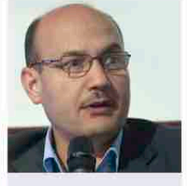


Martin Basila, Sensoneo

Mathias Cormann, Department of Finance

Mike Sarasti, City of Miami

Mohamed Maleeh Jamal, Ministry of Communication, Science and Technology

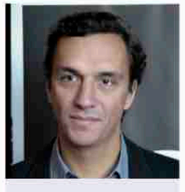


Mongi Marzouk, The Ministry of Communication Technologies

Nadhim Zahawi, Department for Business, Energy & Industrial Strategy

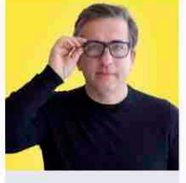
Rikke Hougaard Zeberg, The Ministry of Finance Agency for Digitisation

Robert Shurtleff, IBM



Sascha Haselmayer, Citymart

Seamus Kraft, Article One



Spiros Margaris, Wefox Group

Tan Kok Yam, The Smart Nation and Digital Government Office

Ursula Owusu, Ministry of Communications

Yogida Sawmynaden, Ministry of Technology, Communication and Innovation

30 GovTech Journalists

Alice Lipowicz,
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Darkened World

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Anne Lochoff,
UNDP

Ben Heather,
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Bryan Glick,
ComputerWeekly

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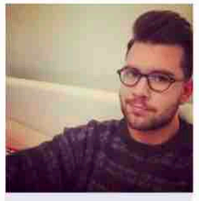

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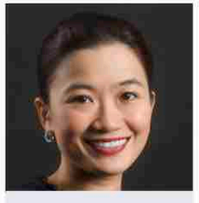

Jacqueline Poh,
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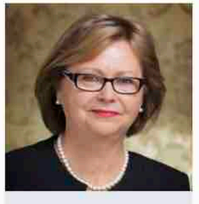

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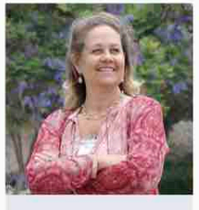

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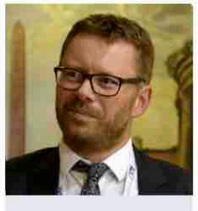

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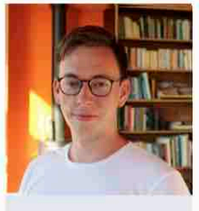

Oscar Williams,
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Owen Hughes,
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Patricia Williams,
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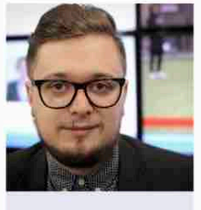
Rosemary Bennett,
The Times



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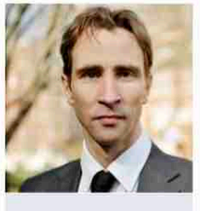

Warwick Mansell,
Education Uncovered

GovTech and a Modern State

Advanced technology has penetrated everyday life changing the way people communicate, study, work, shop and rest. New mobile services such as online banking, social networks, Uber, etc., have become a necessity no one can avoid using. With this revolution encompassing all regions and populations around the world, it could not but affect interaction between modern governments and citizens.

The ongoing rise of Govtech brings a more functional state that matches today's level of technology development and, most importantly, the demands of technologically-savvy citizens. Accenture research shows that 75 percent of citizens globally say government needs to tackle complex issues by collaborating with them, and 60 percent would themselves take an active role in personalising services. Modern state emulates communication tools used by the modern companies in their communication with clients. In other words, a state wants to be more close to its customers. State transformation can be explained by:

1. **Public Expectations.** Citizens have rising expectations as they have grown accustomed to a different kind of user experience and functionality from using consumer-focused apps like Spotify, Uber and Google.
2. **Technologies.** Falling technology prices allow smaller companies to deliver cloud-based, mobilefirst services that are as robust and secure as the solutions that were previously the preserve of large corporates.
3. **Government Engagement.** Active policies by national and supranational governments are increasing government engagement with startups and subject matter experts (SMEs).

The power of GovTech lies in its ability to help governments to govern and innovate more effectively. This includes opportunities such as new channels for engaging and communicating with citizens (CivTech), and platforms that facilitate improved service delivery, and ongoing experimentation with emerging technologies.

Source: Accenture

E-Participation: Tool for Public Engagement

According to the United Nations 2018 E-Government Survey, e-government has been rapidly growing since the first UN attempt to access the state of the industry in 2001. The percentage of countries with high level of e-government development is reaching 58%, although digital divide is still significant due to high cost of Internet access, e-illiteracy, and bad connectivity in poor countries. This growth brought improvement in public services, citizen engagement, and transparency and accountability of authorities at the local level.

In the reality of ongoing government digitalization, the key instrument for interaction between government and citizens is e-participation defined “as the process of engaging citizens through ICTs in policy, decision-making, and service design and delivery so as to make it participatory, inclusive, and deliberative” (United Nations, 2013). According to UN 2018 Survey, the number of governments encouraging citizens to contribute their ideas and provide feedback is growing, with Denmark, Finland, and Republic of Korea being absolute leaders in e-participation, followed by the Netherlands, Australia, Japan, New Zealand, Spain, UK, and US.

- The first level is **e-information**. Governments provide people with online information through ICT channels to help them make informed choices. E-information allows participation to be evidence-based and fully relevant.
- The second level of e-participation is **e-consultation**. Designing new services and crafting new policies is preceded by consulting the people in order to better respond to public expectations. If people feel that their voice is heard through e-consultation, this could increase utilization of other e-government services. Thus e-participation can serve as a catalyst towards greater e-inclusion.
- The third, and the most tricky, level of the e-participation is **e-decision-making**. It refers to such approach to the decision-making processes in which people can provide their own inputs and make a difference. For example, this can be done through direct e-voting via secure systems.

Initiatives through which different countries implement e-participation, vary. In Denmark, for instance, e-participation is a part of Digital Strategy for 2016-2020. Japan has the "Idea Box" Initiative, which is interactive website opened to gather ideas from people and discuss e-governance issues.