

CITIZENS OF SLOVAKIA AND THE SERVICES OF e-GOVERNMENT

A Report from the Public Opinion Polls

Ordered by PPP (www.p3.sk) and ITAS (www.itas.sk)

Performed by MVK Agency in June 2004

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1 INTRODUCTION

The research "Citizens of Slovakia and the services of e-government" was carried out as a part of the public opinion polls realised by MVK Agency in June 8-14 2004 on the sample of 1 160 respondents. The sample was representative for the adult population of Slovakia as to their age, sex, nationality, education and residence.

The aim of the research was to reveal the attitudes of the adult population of Slovakia towards the services of e-government and make a comparison with the results of identical research performed in 2003. As it is only possible to take advantage of the services of e-government through the means of personal computer and internet access, a part of the research was concerned with possibilities and abilities to use them.

Following report provides a deeper analysis of the data collected in the public opinion polls. The task of their processing and presenting was set by PPP and ITAS.

The report contains the results of the research. They are divided into the parts identical to the sections of the questionnaire used in the public opinion polls:

1. Personal Computers

- ability to use a PC
- possibility to use a PC

2. Internet

- ability to use the internet
- possibility to use the internet
- internet access at home (interest or lack of interest in connecting one's home to the internet)
- use of the internet (aspects related to the intensity of internet connection)
- use of the internet services - information searches

3. e-Government

- knowledge of the offices' web sites
- visiting the offices' web sites, requesting and evaluating the information
- knowledge of "www.obcan.sk" (www.citizen.sk)
- evaluation of the services of e-government in Slovakia

4. Interest in the services of e-government in Slovakia

Data processing involved several tasks:

- ◆ percentual expression of the number of answers to each question in proportion to
⇒ the given sample - in this case, the results apply to the adult population of Slovakia

⇒ the internet users (regular and irregular) - in this case, the results apply to the adult population of the internet users in Slovakia

- ◆ classification of all the questions and their respective answers
- ◆ evaluation of all the questions and their respective answers aimed at identifying statistically significant differences between individual groups of respondents and - consequently - distinguishing specific groups of respondents relevant to particular issues covered by related questions

Presentation of the results in the following report is based on the same approach. It comprises percentual expression of the polls results, their classification and their evaluation. Such organisation of the polls results makes it possible to display statistically significant differences between individual groups of respondents determined by socio-demographic factors (age, education, income, work status, residence).

The report is divided into two main parts. The first one presents the most important findings of the research according to its individual sections. In the second part of the report, the results of the report are analysed in detail.

2 THE MOST IMPORTANT FINDINGS OF THE RESEARCH

2.1 Personal Computer - accessibility and use

In 2004, 40.8% of the adult population own a personal computer, which is almost 5% more than in 2003 (35.9%). In comparison with 2003, the percentage of PC owners is higher in every age category. In 2004, PCs can be found even in the households of older and less educated respondents. The number of PCs owned by students and entrepreneurs has increased and more PCs can be found in the households located in the smallest municipalities and in the towns of medium size.

Interest in buying a personal computer has remained steady (about 20% of the adult population both in 2003 and 2004) which indicates certain rigidity of the PC market in the household segment.

In the event of unexpected income, only younger respondents would buy a personal computer, the others would prefer other household appliances or a luxurious holiday. As far as subsidised PCs are concerned, mostly the respondents who already own a personal computer would be interested in obtaining them.

In 2004, 45% of the adult population are able to work with a personal computer, which is 3.4% more than in 2003.

33.5% of the adult population use PCs at home, 28.2% at work (which is 49.5% of the working population) and 5.4% at school (88.7% of the students).

2.2 Internet

At the moment, 4.4% of the respondents have never heard of the internet and 25.3% of the respondents have heard of the internet but do not know what it is. 31% know what it is but have not used it yet, which means that 61% of the population (compared with 68.2% of the population in 2003) have no practical experience with the internet.

39% of the population have already used the internet or have been using it either regularly or irregularly - in comparison with 2003 (31.8%), this figure has risen by 7.2%.

Statistically, the internet user in Slovakia is a **man, 18-29** years old, with **secondary or tertiary education**, a **student** or an **entrepreneur**, owning **more than 12 000** per month netto, living in the **region of Bratislava**, in a town with **population of over 50 000**.

As far as possibility to access the internet is concerned, 15.5% of the population use the internet at home, 22.9% at work, 5.3% at school, 23.6% at the internet cafes or clubs and 11.6% at the public internet access point (library, tele-house, etc.). When juxtaposed with the last year figures, this percentage indicates that accessibility of the internet has remained stagnant.

4% of the population would like to be connected to the internet within one year, 24% in close (or less close) future. These figures are quite similar to those of 2003.

More than a half of the respondents interested in connecting to the internet would like to pay only 250 SK per month, 27% less than 500 and 3% less than 750. None of them would like to pay 1 000 SK per month or more.

Lack of interest in the Internet was expressed by 57.1% in 2004 and by 59% in 2003, which represents only a minor improvement. The reasons for such an approach towards the internet have remained the same: mostly financial situation, lack of knowledge, doubts related to usefulness and helpfulness of the internet or absolute apathy.

Most of the internet users have been using it for more than two years (51%) or more than a year (28%), 18% only started to use the internet this year.

One third of the internet users connects daily, 38% weekly and 28% less often. Most of the internet users (49%) spend on the internet 1-5 hours per week and more than a third less than one hour weekly. 16.5% of the internet users surf the internet for more than five hours per week.

Usually, the internet users who connect more often spend more time on the internet. This year research has confirmed this tendency and revealed that the number of those who connect more often and spend more time on the internet has slightly grown. Nonetheless, the number of those who only connect sporadically and spend on the internet less than an hour weekly has increased considerably.

This year research has also affirmed that most of the internet users connect in order to access the e-mail, to search for the information related to their work or study, to search for practical information (public transport timetables, weather forecasts, currency exchange rates, TV programmes, etc.) or to amuse themselves.

The internet users perceive the internet as a positive element in their lives: it allows them to gain important information, to communicate with distant people, to save time (and even money) and to access the services of e-government.

2.3 e-Government

In 2004, the internet users visited the web sites of the government, the parliament, other levels of government (regional and local) and different public offices less often than in 2003: 34.7% in comparison with 42%. However, experience with the services of e-government is quite positive.

Just like in 2003, the respondents visited the regional or local offices in order to simplify their communication with the offices (to obtain various forms, to check the office hours or certain procedures) and to get relevant information (regulations, conditions, explanations, etc.). The respondents showed only a marginal interest in the information related to regulation and supervision of the offices' activity (budgets, expenditures, registers of suppliers, registers of applicants, etc.).

29% of the internet users are familiar with "www.obcan.sk" which is a figure 10% lower than last year. Last year, there was more information about "www.obcan.sk" in the media because it was being launched at the moment. In 2004, the respondents know the portal mainly from electronic media, but also from the press. Because of a low usage and knowledge of the portal among the respondents, it has not been possible to process and interpret further questions related to it.

The research has concentrated on the services of e-government on general level - it has not focused on concrete services. Despite that, the respondents have expressed a great deal of interest in the services of e-government in hypothetical questions - under certain circumstances, 66% of them would deal with the offices through the internet.

Unlike in the last year research, the respondents were asked a question about the means of improving general interest in the internet. The answers clearly show that the barriers are mostly financial: majority of the respondents think that lower prices of PCs and the internet connection would improve the situation. Almost 57% suggest that also public internet access points (libraries, tele-houses, etc.) with really low prices could make the situation better. As far as more information **about** the internet or more information **on** the internet are concerned, the respondents do not consider them to be important in the matter.

3 DETAILED ANALYSIS OF THE RESEARCH RESULTS

3.1 *Composition of the Sample*

The public opinion polls were realised in June 8-14 2004 on the sample of 1 160 respondents of 18 years and more. The sample was representative for the adult population of Slovakia as to their age, sex, nationality, education and residence. The sample can be characterised by following features:

- **AGE**

- ◇ category 18-29 years of age: 302 respondents (26%)
- ◇ category 30-39 years of age: 230 respondents (19.8%)
- ◇ category 40-49 years of age: 216 respondents (18.6%)
- ◇ category 50-59 years of age: 153 respondents (14.1%)
- ◇ category over 60 years of age: 249 respondents (21.5%)

- **SEX**

- ◇ men: 558 respondents (48.1%)
- ◇ women: 602 respondents (51.9%)

- **EDUCATION**

- ◇ primary: 178 respondents (15.3%)
- ◇ apprenticeship: 479 respondents (41.3%)
- ◇ secondary: 381 respondents (33.8%)
- ◇ tertiary: 122 respondents (10.5%)

- **WORK STATUS**

- ◇ students: 71 respondents (6.1%)
- ◇ not working (maternity leave, military service, etc.): 37 respondents (3.2%)
- ◇ retired: 285 respondents (24.6%)

- ◇ unemployed: 106 respondents (9.1%)
- ◇ employed: 512 respondents (44.1%)
- ◇ sole traders and entrepreneurs: 134 respondents (11.5%)
- ◇ others: 15 respondents (1.3%)

- **INCOME (per month)**

- ◇ less than 4 000: 183 respondents (15.8%)
- ◇ 4-8 000: 446 respondents (38.4%)
- ◇ 8-12 000: 276 respondents (23.8%)
- ◇ 12-20 000: 122 respondents (10.5%)
- ◇ more than 20 000: 36 respondents (3.1%)

- **REGION OF RESIDENCE**

- ◇ Bratislava: 135 respondents (11.6%)
- ◇ Trnava: 115 respondents (9.9%)
- ◇ Trenčín: 125 respondents (10.8%)
- ◇ Nitra: 160 respondents (13.8%)
- ◇ Žilina: 150 respondents (12.9%)
- ◇ Banská Bystrica: 150 respondents (12.9%)
- ◇ Prešov: 165 respondents (14.2%)
- ◇ Košice: 160 respondents (13.8%)

- **MUNICIPALITY SIZE**

- ◇ less than 2 000 inhabitants: 360 respondents (31%)
- ◇ 2-20 000 inhabitants: 325 respondents (28%)
- ◇ 20-50 000 inhabitants: 185 respondents (15.9%)
- ◇ 50-100 000 inhabitants: 140 respondents (12.1%)
- ◇ over 100 000 inhabitants: 150 respondents (12.9%)

3.2 *Personal Computer - Accessibility and Use*

3.2.1 Personal Computer in a Household

A personal computer - possibility to use it and ability to use it - is the main condition and the first prerequisite of using the internet. This is the reason why a large section of the questionnaire was focused on a personal computer itself.

According to the respondents' answers, there is a personal computer in a household of 40.8% of the adult population. There are significant differences between various socio-demographic groups:

- as to **AGE**
18-29 years of age: 53.3%, 30-39 years of age: 41.9%, 40-49 years of age: 54.6%, 50-59 years of age: 30.7%, over 60 years of age: 12%
- as to **SEX**
men: 44.4%, women: 37.4%
- as to **EDUCATION**
primary: 24.7%, apprenticeship: 29.6%, secondary: 53.5%, tertiary: 68%
- as to **INCOME**
less than 8 000 per month: 22%, 8-12 000: 40.9%, 12-20 000: 66.4%, over 20 000: 83.3%
- as to **INCOME OF THE HOUSEHOLD**
4-8 000: 11.9%, 8-12 000: 26.9%, 12-16 000: 31.1%, 16-20 000: 54.8%, 20-24 000: 60%, 24-28 000: 66%, over 28 000 per month: 75%
- as to **WORK STATUS**
students: 84.5%, not working: 37.8%, retired: 11.6%, unemployed: 36.8%, employed: 46.7%, sole traders: 59.3%, entrepreneurs: 81%
- as to **REGION OF RESIDENCE**
substandard results appear in the regions of Trnava (31.3%) and Banská Bystrica (32.7%), the regions of Prešov (44.2%) and Žilina (50%) reach highly above the average
- as to **MUNICIPALITY SIZE**
municipalities with the population of less than 5 000: 35%, 5-10 000: 33.3%, 10-50 000: 45.9%, 50-100 000: 50.7%, above 100 000: 44.7%
- as to **POLITICAL PREFERENCE**
potential voters of ANO (56.5%), SF (58.6%) and SDKÚ (64.2%) tend to own a personal computer more often than the respondents with a different political preference

In comparison with 2003, the percentage of PC owners is higher in every age category. In 2004, PCs can be found even in the households of older and less educated respondents. The number of PCs owned by students and entrepreneurs has increased and more PCs can be found in the households located in the smallest municipalities and in the towns of medium size.

Interest in buying a personal computer has remained almost steady. In the closest future (within a year), 3.9% of the respondents would like to purchase one (3.4% in 2003), 16.6% (15.8%) would like to buy one later. According to the region of residence and the municipality size, the interest in buying a personal computer is as follows:

Table 1Interest in buying a PC for a household as to **REGION OF RESIDENCE**

REGION	PC in the household		purchase in the closest future		purchase in the future	
	2003	2004	2003	2004	2003	2004
Bratislava	42.0	42.2	0.8	4.4	11.8	14.1
Trnava	37.8	31.3	4.2	4.3	19.3	19.1
Trenčín	32.0	40.0	0.8	1.6	16.0	16.8
Nitra	40.3	41.3	3.1	6.3	12.6	15.0
Žilina	35.8	50.0	5.2	3.3	17.2	11.3
Banská bystrica	30.7	32.7	2.9	4.7	14.3	20.0
Prešov	34.9	44.2	6.5	3.0	15.4	18.8
Košice	34.2	41.9	2.5	3.1	19.9	17.5
TOTAL	35.9	40.8	3.4	3.9	15.6	16.6

Table 2Interest in buying a PC for a household as to **MUNICIPALITY SIZE**

NUMBER OF INHABITANTS	PC in the household		purchase in the closest future		purchase in the future	
	2003	2004	2003	2004	2003	2004
less than 1 000	n/a	32.8	n/a	2.1	n/a	18.5
1-2 000	29.1	38.8	4.9	6.1	18.6	16.4
2-5 000	29.5	33.8	4.0	4.8	15.4	16.6
5-10 000	42.0	33.3	2.9	4.0	18.8	28.0
10 -20 000	41.0	41.9	1.9	3.8	11.4	13.3
20-50 000	43.4	48.1	3.2	3.2	14.8	13.5
50-100 000	35.1	50.7	1.5	4.3	12.7	12.9
over 100 00	43.8	44.7	2.3	3.3	15.4	18.0
TOTAL	35.9	40.8	3.4	3.9	15.6	16.6

42.4% of the respondents who do not own a personal computer are not interested in buying one at all and 17.5% are most likely not to purchase one, which means that 59.9% of the

respondents have a negative approach towards buying a personal computer. From the respondents who do not own a personal computer, 34.5% would like to buy one, 6.6% urgently.

Significant differences between various socio-demographic groups are quite similar in the researches of 2003 and 2004 - the trends have remained unchanged, only the proportions within individual groups have slightly changed:

- as to **AGE**

the interest in buying a personal computer is decreasing with rising age: majority of the respondents intending to purchase a PC can be found in the age category of 30-39 (13.7% within a year, 53% later)

- as to **EDUCATION**

the interest in buying a personal computer is increasing according to the education achieved: from 0.7% related to the respondents with primary education to 12.8% related to those with tertiary education.

- as to **INCOME**

within the groups with higher income, the interest in a purchase is more intense: 16.7% (the highest income group) as compared to 7.1% within the lowest income group

- as to **INCOME OF THE HOUSEHOLD**

with growing income, the interest in buying a personal computer is rising gradually and reaching a peak of 20% in the group of the highest household income

- as to **WORK STATUS**

within a year, 9.1% of students would like to make a purchase, as well as 13% of the respondents who do not work, 10.3% of the employed ones and 15.2% of the sole traders

- as to **POLITICAL PREFERENCE**

potential voters of ANO, KSS and SMER show the highest interest in buying a personal computer

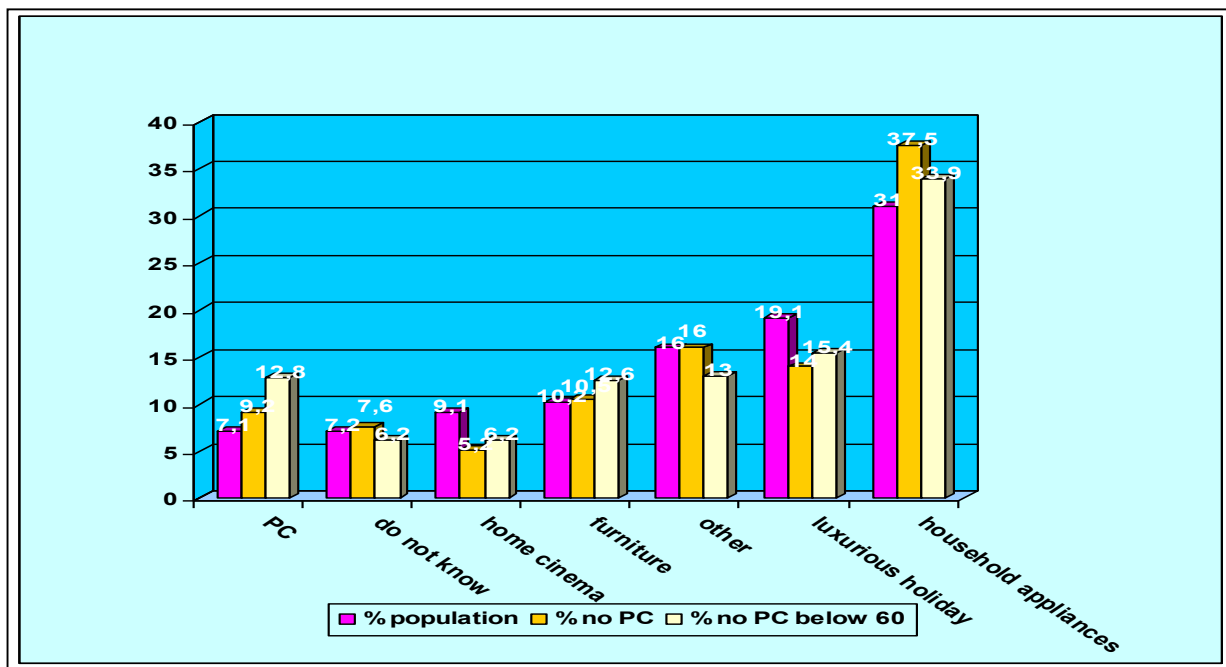
In comparison with the research of 2003, two additional questions related to the interest in buying a personal computer were asked in the research of 2004.

In the first additional question, the respondents were asked what they would buy in the event of unexpected income of 30 000 SKK, which is the price of a relatively good PC. The respondents were given six possible items to choose from. From all the options, the respondents ranked a personal computer as the fifth - 7.1% of those who own a PC and 9.1% of those who do not (only a purchase of home cinema seems to be less attractive). The respondents would prefer to buy other household appliances, a luxurious holiday, new furniture or other consumer goods. More interesting approach with regard to this issue, is the one considering the

respondents' age. From those who do not own a PC, 18.4% of the respondents aged 18-29 and 19.7% of the respondents aged 30-39 placed a personal computer right after the purchase of other household appliances. However, the respondents who do not own a PC and are over 40 years of age are not inclined towards buying a PC. Moreover, the respondents older than 60 do not show any interest in obtaining one - this fact indicates that it is more realistic to consider this issue without the age group of over 60 years of age. In such case, this issue can be summarised as follows:

Graph 1

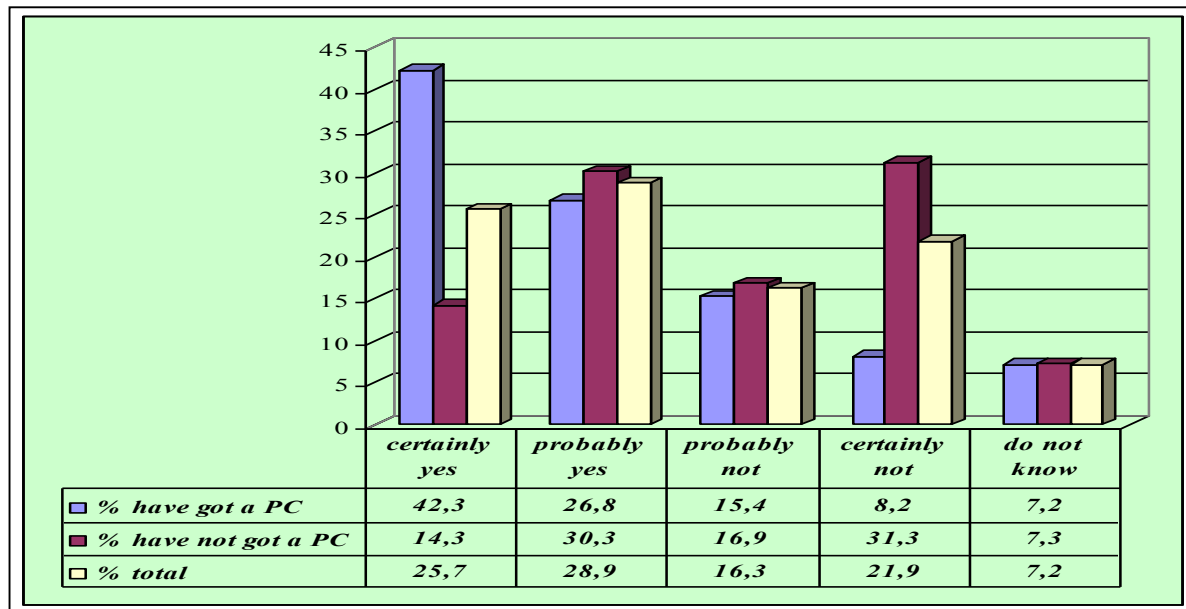
Percentage of purchase preferences within the population, within those who do not own a PC and within those who do not own a PC and are less than 60 years old



The second additional question was concerned with PCs subsidised by the IT companies and/or the state. The results indicate that mostly the respondents who already own a personal computer would be interested in obtaining PCs subsidised by the IT companies and/or the state - in this case, their interest is three times higher than the interest of the other respondents. Almost one third of those who do not own a PC would not opt for a subsidised PC. The results are shown below:

Graph 2

Interest in PCs subsidised by the IT companies and/or the state



The results of both additional questions reveal that in general, the interest in obtaining a personal computer (with the exception of the respondents in their twenties and thirties) is quite low - even in the case of unexpected income. The interest in acquiring a personal computer subsidised by the IT companies and/or the state is higher to some degree, especially within the respondents who own a PC already. As far as the respondents' age is concerned, it is usually those who fall into the categories up to 29 (70%), up to 39 (76.1%) and up to 49 years of age (68%) who would be most interested in a subsidised PC.

It can be assumed that the respondents older than 60 who have not owned and who have not used a personal computer so far, do not plan to buy one or get one. As the respondents older than 60 form more than a fifth of the sample, more objective results about buying or getting a PC can be obtained by excluding them. Considering the respondents who do not own a PC and are younger than 60, 9.6% plan to buy a PC in the closest future and almost 40% in the future. 12.8% would purchase a PC in the case of unexpected income and 60% of those who do not own a PC (compared with 69% of those who own a PC) would opt for a subsidised one. It has to be remarked that the interest in PCs subsidised by the IT companies and/or the state is significantly higher within those who have got a PC than within those who have not got it.

3.2.2 Digital Literacy

In the section of the questionnaire related to digital literacy, the respondents were asked about their ability to use a personal computer regardless the fact that they own or do not own it. The answers of both researches (the 2003 one and the 2004 one) are presented below:

Table 3

Digital literacy (ability to use a personal computer)

	2003	2004
unable and not wishing to know	32.3%	28.6%
unable and wishing to know	14.8%	14.5%
able with assistance	11.3%	11.8%
able with training	16.5%	18.0%
able without training	15.1%	17.3%
able and educated in the field	9.9%	9.7%

The researches show that from all the respondents, 41.6% in 2003 and 45% in 2004 were able to use a PC independently. When the two researches are compared, there are only marginal changes in digital literacy within all its degrees - whether the "illiterate" ones or the "educated" respondents are considered. The significant differences related to digital literacy are as follows:

- as to **AGE**

The proportion of the "literate" respondents is higher with decreasing age and lower with increasing age. This tendency is characteristic for both researches. However, the polarisation has become more profound - majority of the youngest ones are able to use a PC, majority of the oldest ones are not able to.

- as to **EDUCATION**

similar results as above: higher the education, higher the "literacy" and vice versa (lower the education, lower the "literacy")

- as to **INCOME**

with growing income, the percentage of "literate" respondents is higher

- as to **WORK STATUS**

None of the students lacks the interest in learning to work with a PC and the highest number of those not willing or not wishing to learn is among the retired respondents (72.3%). The highest degree of digital literacy can be found among students (91.5%) and the employed respondents (57%).

- as to **MUNICIPALITY SIZE**

In the smallest municipalities, the number of those who are not interested in learning to use a PC is higher than in bigger towns (35.5% versus 22%). Similarly, the percentage of "literate" respondents is lower in the smallest municipalities and reaches a peak of 56% in the biggest towns.

- as to **POLITICAL PREFERENCE**

the degree of digital literacy is higher within the potential voters of ANO, SDKÚ, SMER and SF

The results related to sex are statistically insignificant (nonetheless, the situation is better with men than with women - they are less unwilling to learn and more of them are "literate"), just like the results concerning the region of residence. The highest digital literacy is in the region of Bratislava: 54.6% in 2003 and 54% in 2004. The lowest percentage of respondents who do not want to learn to use a PC was 29.4% in 2003 (the region of Bratislava) and around 24% in 2004 (the regions of Žilina and Prešov).

3.2.3 Use of a Personal Computer

The percentage of non-users was 54.3% in 2003 and 50.3% in 2004. This shift is quite minor, even if the category of non-users is mainly composed of the respondents older than 50 years of age with basic education, the income of less than 8 000 and the household income of less than 16 000, not working, retired or unemployed and living in a municipality with no more than 10 000 inhabitants.

The proportion of those who use a personal computer at home was 30% in 2003 and 33.5% in 2004, which is not a serious change either. In both researches, this group comprises the younger respondents with secondary or tertiary education. However, the number of less educated respondents who use a computer at home has increased, which is a positive trend. Significantly higher use of PCs at home is among students (64.4% in 2003 and 84.5% in 2004), among sole traders (46.9% both in 2003 and 2004) and employees. At home, the men (35.9% in 2003 and 37.5% in 2004) use a PC more often than women (24.9% in 2003 and 29.9% in 2004). Significantly higher use of PCs at home is also within the respondents with the income above 10 000 and the household income above 16 000, in the municipalities with the population higher than 10 000. Potential voters of SDKÚ, ANO and SMER (all of these reach 50% and more) use the PCs at home most often, potential voters of KSS (14.3%) and HZDS (16.7%) fall below the average.

At work, a personal computer was used by 27.7% in 2003 and 28.2% in 2004, which does not indicate a positive change - unfortunately, the number of sophisticated working

positions does not seem to be increasing. In both researches, the respondents who use a PC at work most often are younger than 49 years of age, with secondary or tertiary education, the income of more than 8 000 and the household income of more than 16 000, employees or sole traders, living in the municipality of 20 000 inhabitants and more. According to the research of 2004, they are mainly potential voters of ANO, SDKÚ, SF and SMER.

At school, a personal computer is used by students, which is obvious. Considering the percentage, there is an impressive change: 76.3% in 2003 and 88.7% in 2004.

Only 8.4% of the respondents use a personal computer at other locations.

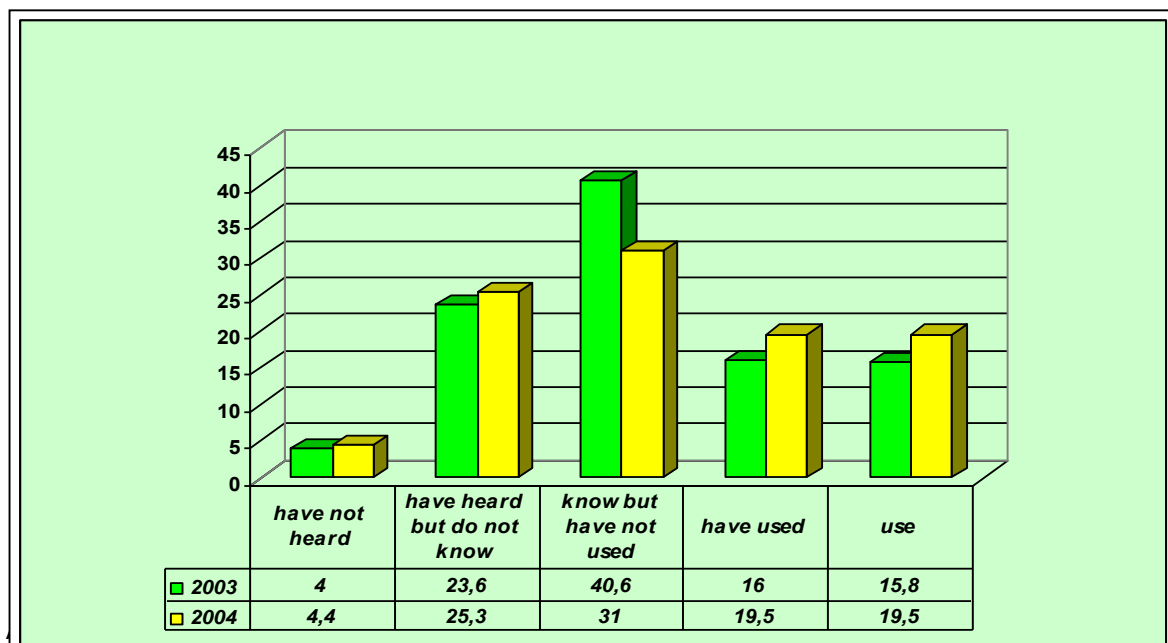
3.3 Internet

3.3.1 Ability to Use the Internet

In this section of the questionnaire, the respondents were asked a simple question related to their familiarity with the internet. According to given answers, 4% of the sample (45 respondents) in 2003 and 4.4% of the sample (51 respondents) in 2004 have never heard of the internet. Currently, 25.3% have heard of it but do not know what it is and 31% know what it is but have never used it. These figures mean that 68.2% of the population in 2003 and 61% of the population in 2004 had no practical experience with the internet. The only element that has been improved is familiarity with the existence of the internet - this trend can by no means be perceived as positive:

Graph 3

Familiarity with the internet within the population



In 2003, 31.8% of the population were using the internet - 16% irregularly, 15.8% regularly. In 2004 it was 39%, a half of which were irregular and a half regular users. There is a number of statistically significant differences:

- as to **AGE**

Almost one third of the youngest age group have used or have been using the internet. With increasing age, this figure rapidly falls: down to 24.5% of the respondents in their fifties and 5.6% of those who are older than 60 years of age. In comparison with 2003, the number of internet users (irregular or regular) has increased in every age group up to 49 years of age by 10%.

- as to **SEX**

In 2003, 34% of men had certain experience with the internet. This figure rose to 41.4% in 2004. As far as women are concerned, 29% of them had used or had been using the internet in 2003 and 37.2% in 2004. Although the gap between men and women has slightly narrowed, the difference between the two groups has remained serious.

- as to **EDUCATION**

The respondents with primary education are usually least familiar with the internet: only 18% of them have already used it. This figure is a bit higher with the respondents who have achieved apprenticeship degree (22.8%) and soars to 57.7% of those with secondary and 77% of those with tertiary education. When compared with the last year results, the number of respondents who have certain experience with the internet has increased in every category: by 7% in the group of respondents with basic education, by 10% in secondary education category and by 5% in tertiary education one. The last figure is slightly lower than the previous ones as the number of internet users with the university degree was quite high already in 2003.

- as to **INCOME**

The number of respondents not familiar with the internet at all is the highest in the category of 4-8 000 (48.4%). In the category of 8-12 000 it is not as high, but there is still the lack of practical knowledge or usage. Within the categories of higher income, percentage related to practical knowledge and usage is increasing. 86.1% of the respondents from the highest income group are familiar with the internet. In comparison with 2003, the percentage of those who have certain experience with the internet has grown within the lowest income group, just like within all higher income groups.

- as to **WORK STATUS**

None of the students is unfamiliar with the internet - 91.5% of them are irregular or regular users. 81% of the entrepreneurs, 53.1% of the sole traders and 47.7% of the employees use it (irregularly or regularly). 64.6% of the retired and 38% of the unemployed are not familiar with the internet at all. These results indicate a profound differentiation of the population: there is an increase within those who are familiar with the internet and use it, as well as within those who are unfamiliar with the internet and do not use it.

- as to **REGION OF RESIDENCE**

The highest percentage of unfamiliarity with the internet is in the regions of Banská Bystrica, Trnava and Košice, those who have certain experience with the internet are mainly from the regions of Bratislava, Žilina and Prešov. Major changes can be seen in the regions of Žilina and Prešov, where the percentage related to practical knowledge and usage has increased significantly.

- as to **MUNICIPALITY SIZE**

In general, the respondents residing in municipalities with population of 2 000 and less are unfamiliar with the internet, the inhabitants of municipalities with population of more than 20 000 tend to have certain experience with the internet and their percentage gradually increases with the growing municipality size (from 43.2% to 55.3%). Between 2003 and 2004, the number of those who have certain experience with the internet increased in every category of municipality size.

- as to **POLITICAL PREFERENCE**

The respondents who do not know anything about the internet are mainly the potential voters of HZDS (55% of them), KSS (38%), KDH (32.6%) and SMK (32.5%). The potential voters of SMER (45.3% of them), ANO (54.3%), SF (62.1%) and SDKÚ (67.2%) have certain experience with the internet.

The next question focused on the internet use and its aim was to establish a category of the internet user. The internet user is the one who has used the internet within the last 12 months. 38.2% of the respondents can be classified as the internet users - irregular or regular ones (they form a majority of the internet users: 31.6% of them have used the internet within the last 3 months).

Statistically, the internet user in Slovakia is a man, 18-29 years old, with secondary or tertiary education, a student or an entrepreneur, with an income of more than 12 000, living in the region of Bratislava, in a town with population of over 50 000.

3.3.2 Possibility to Use the Internet

At the moment, there are various options to choose from as far as the possibility to use the internet is concerned. 15.5% of the respondents use the internet at home, 22.9% at work, 5.3% at school, 23.6% at the internet cafes or clubs and 11.6% at the public internet access point (library, tele-house, etc.). 11.6% of the respondents access the internet through the mobile phone (WAP, GRPS) and 2.8% access it at a different location. The differences between 2003 and 2004 are shown below:

Table 4

Possibility to use the internet within the population

internet access	2003	2004
at home	14.3	15.5
at work	22.2	22.9
at school	5.3	5.3
at the internet cafes or clubs	21.9	23.6
at the public internet access point	10.4	11.6
through the mobile phone	7.5	7.6
at a different location	2.2	2.8

The results of the two researches show that the change between 2003 and 2004 has been minimal. As far as the internet access at home is concerned, the figures are alarming: the situation in Slovakia is considerably worse than in any of the old EU members (41% of the EU population had the internet access at home already in 2002) and only few of the new EU members have a lower percentage of households connected to the internet (Hungary, Lithuania and Latvia). There is more households connected to the internet even in Romania and Bulgaria.

Internet Access at Home

The respondents whose households are connected to the internet are mostly younger than 50 years of age and have secondary or tertiary education. Regarding their work status, they are usually entrepreneurs, sole traders, students and employees with an income of 12 000 and more (with growing income, the number of households connected to the internet is steadily increasing). However, statistically significant is also a group with no income - the students, who use the internet at home in a large proportion. The highest percentage of households connected to the internet is in the regions of Bratislava, Trenčín and Žilina. The respondents who use the internet at home tend to be potential voters of ANO, SF and SDKÚ, potential voters of KDH represent the average of the sample.

Internet Access at Work

22.9% of the respondents use the internet at work, which is 49.8% of the employees. In comparison with 2003, the number of those who use the internet at work has not increased but the percentage of the employees with the internet access at work has (36.7% in 2003 and 49.8% in 2004).

Statistically significant differences related to the internet access at work can be summarised as follows:

- as to **AGE**
the respondents in their twenties and thirties, but mostly those in their forties use the internet at work
- as to **INCOME**
the respondents with an income of 8 000 and more (with growing income, the possibility to use the internet at work increases rapidly)
- as to **WORK STATUS**
entrepreneurs, sole traders and employees
- as to **REGION OF RESIDENCE**
dominance of the regions of Bratislava, Žilina, Banská Bystrica and Prešov
- as to **MUNICIPALITY SIZE**
all the municipalities with the population of more than 20 000 inhabitants reach considerably above the average
- as to **POLITICAL PREFERENCE**
mostly potential voters of KDH, SF and SDKÚ use the internet at work

Internet Access at School

In 2004, 5.3% of the respondents use the internet at school, which is 85.9% of the students compared with 72.9% of the students in 2003.

Internet Access at the Internet Cafes or Clubs

Almost 24% of the respondents use the internet at the commercial internet access point such as an internet cafe or a club. The internet cafes and clubs are mostly visited by the respondents in their twenties and thirties with secondary or tertiary education, students, unemployed and sole traders, with no income or an income of more than 8 000. More respondents use the internet cafes and clubs in the municipalities of 2-20 000 inhabitants or in the towns with population of 50-100 000. The commercial internet access points are mostly used by the potential voters of SDKÚ, ANO, SF and SMER.

Public Internet Access Points

11.6% of the respondents have a possibility to use the internet at the public internet access point such as a library or a tele-house, which is a satisfying figure. The respondents using the public internet access points are mostly in their twenties, with primary or secondary education, students and unemployed, with no income or an income of more than 8 000. The libraries and tele-houses are used mainly in the regions of Prešov, Banská Bystrica and Žilina. In general, the public internet access points are sought when the respondents have no internet access at home nor at work, which is by no means positive.

3.3.3 Interest or Lack of Interest in Connecting a Household to the Internet

In this section of the questionnaire, the respondents whose households were currently not connected to the internet were asked whether they planned to acquire the internet access. Their answers are presented below:

Table 5

Interest or lack of interest in connecting a household to the internet

plan to acquire the internet access	2003		2004	
	% population	% respondents	% population	% respondents
yes, in the closest future	3.9	4.1	3.6	6.6
yes, in the future	23.2	27.0	23.6	43.1
probably not	17.4	20.3	15.3	28.0
certainly not	37.1	43.3	11.1	20.3
do not know	4.4	5.2	1.0	1.9

The figures show that the respondents interested in acquiring the internet are the ones whose households are not connected yet. A positive attitude was expressed by 31.1% of these respondents in 2003 and 49.7% in 2004. However, the results within the population are less promising and a major increase in the number of connected households can not yet be expected.

There is a number of statistically significant differences related to the issue of interest or lack of interest in connecting one's household to the internet. Mostly the respondents younger than 30 (68.1%) and younger than 40 (67.4%) would like to acquire the internet in the future (about 10% of the respondents in both categories would like to do so in the closest future), the ones with secondary (57%) or tertiary (61.9%) education and an income of 12-20 000 (59.2%), students (70.3%), unemployed (60.4%), employees (56.4%) and sole traders (58.5%). The ones not interested at all are largely the retired and not working respondents with an income lower than 12 000, older than 40 years of age and usually with only basic education.

The respondents interested in acquiring the internet were further questioned how much they would be willing to pay for the connection - they were given several options and were asked to specify a maximum price for the connection per month. The differences between the researches of 2003 and 2004 are shown below:

Table 6

Maximum price for the connection per month

How much would you be willing to pay for the	2003		2004	
	% population	% wishing to connect	% population	% wishing to connect

connection?				
less than 250 SKK	13.9	55.3	16.2	57.3
251-500 SKK	6.3	32.7	7.8	27.4
501-750 SKK	2.2	8.8	0.9	3.4
751-1 000 SKK	0.6	2.5	0.3	1.2
over 1 000 SKK	0.2	0.7	0	0

The answers seem to confirm the fact, that the purchasing power of the population of Slovakia is alarmingly low at the moment.

One more issue has to be considered at this point: the quality of the internet connection. The quality of the internet connection is closely associated with the price paid for it and the cheapest one can only allow the connection of low quality and quantity (the connection for 250 SKK per month has a low speed and only permits the access of 7.5 hours).

The fact that the respondents understand the correlation between the price and the quality of the internet connection can be seen when the answers of those who have been considering acquiring the internet within a year and the answers of those who have not are compared:

Table 7

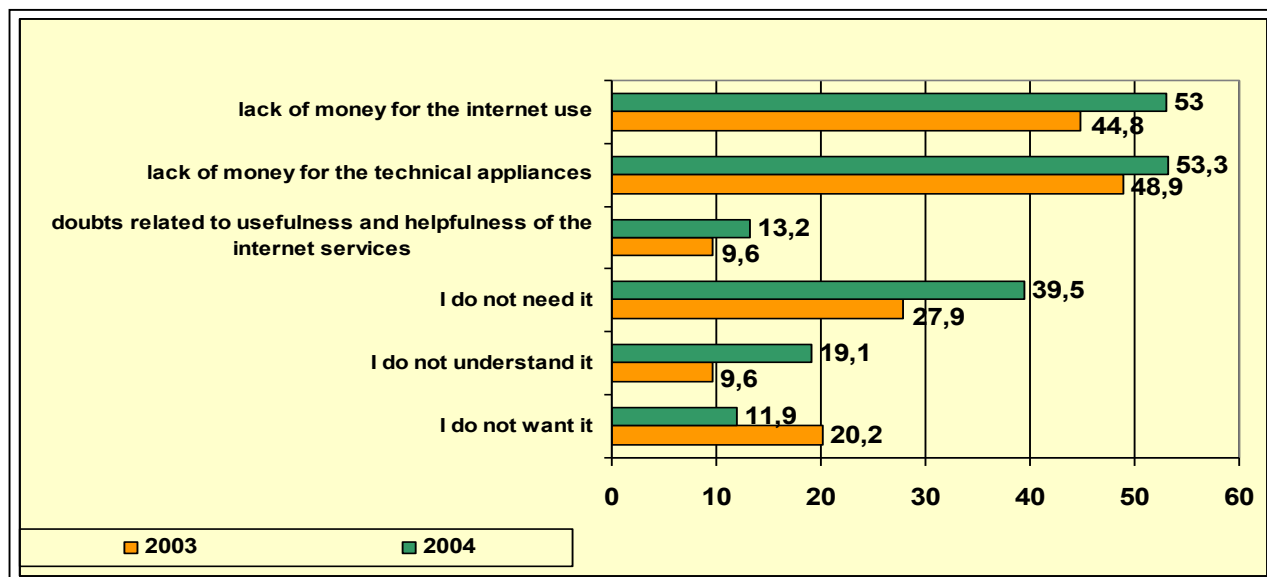
Maximum price for the connection per month - the difference between the respondents acquiring the connection within a year and the respondents getting it later

max price:	less than 250		251-500		501-750		751-1 000		over 1 000	
	2003	2004	2003	2004	2003	2004	2003	2004	2003	2004
closest future	46.2	33.3	35.9	42.9	7.7	4.8	7.7	2.4	2.6	0
future	54.2	62.4	34.7	24.5	8.9	3.3	1.8	1.1	0.4	0
total	55.3	58.5	32.7	26.9	8.8	3.5	2.5	1.3	0.7	0

In both researches, the barriers of the internet connection growth were measured by asking the respondents not interested in the internet the reasons of their attitude. The respondents were allowed to give more reasons and their answers are displayed below:

Graph 4

The reasons for not connecting a household to the internet



The results show that the financial reasons for not connecting a household to the internet are the most important ones. The price of the internet use and the technical appliances seem to be a major problem - both figures have risen within the last year. Some of the respondents expressed their doubts related to usefulness and helpfulness of the internet services (9.6% in 2003 and as much as 13.2% in 2004) and some simply cannot imagine any possible benefits of using the internet - the number of these respondents has increased by 11.6%. The respondents also show their worries about not being able to learn how to use the internet or sheer apathy (however, this answer was chosen by 8% less respondents this year).

There has been a slight shift in socio-demographic characteristics of the respondents opting for the individual choices. Although the answers such as "I do not need it", "I do not understand it" or "I do not want it" were chosen mostly by the same socio-demographic groups as in 2003 (the respondents above 60 years of age, retired or not working, with the income between 4 000 and 8 000), statistical significance related to the region of residence was not confirmed in 2004. Doubtful attitude towards usefulness and helpfulness of the internet services was expressed by the same categories with the exception related to education (the respondents with apprenticeship certificates) and income (between 4 000 and 8 000).

The respondents with apprenticeship certificates, women, employees and those with an income lower than 12 000 are the ones who lack financial means needed for technical appliances. Financial means needed for the internet use are (similarly) the problem for the respondents with apprenticeship certificates, women, employees, not working or retired, and those with the income of 4-8 000. These two alternatives of the answers make the largest difference between the research of 2003 and the research of 2004. Last year, the characteristics

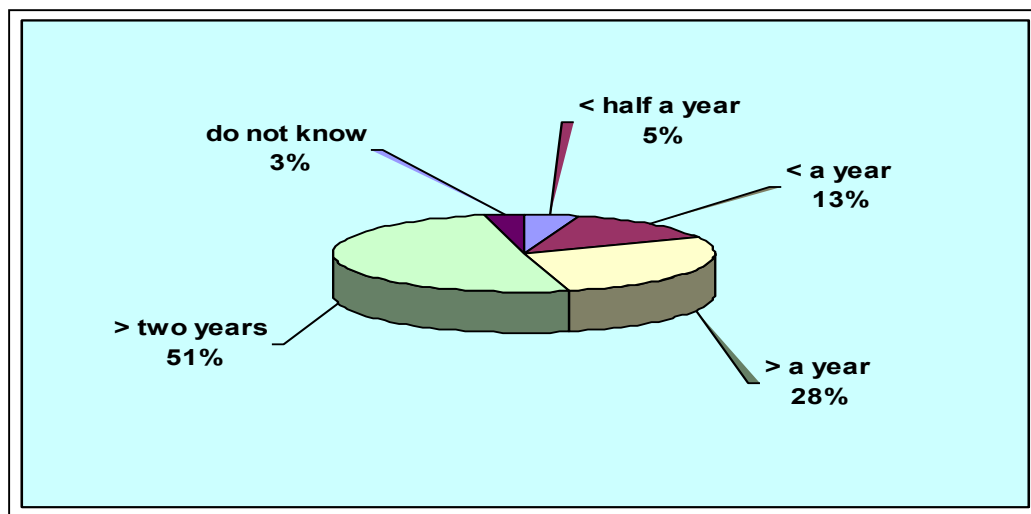
of those who presented the financial barriers as the main reasons for not having or getting the internet were corresponding to the characteristics of the respondents whose households were connected. This year, however, the group perceiving the financial barriers is clearly defined which indicates that the financial barriers are an apparent and a relevant factor of not having or getting the internet.

3.3.4 Intensity of the Internet Use

The questionnaire section related to intensity of the internet use was designated for the internet users - the ones who have been using or have used the internet within the last year. However, the question focusing on the period of their internet use has shown that most of the internet users have been surfing for more than a year and even for more than two years. The structure of the internet users is presented below:

Graph 5

Period of the internet use



The graph shows that more than a half of the internet users have been surfing for over two years and more than a quarter for over a year. The number of the "new" internet users (the ones who have started to use it within the last year) is only 18%, which is 7.2% of the population. It represents the total increase in the number of the internet users - 32.8% in 2003 and 38.2% in 2004. The "new" internet users only differ from the "old" ones in the categories of education and income. The "old" ones are mostly university graduates with no income, an income of less than 4 000 or an income of more than 20 000. The "new" ones have mostly secondary education and

earn between 8 and 12 000 per month. These figures prove that also less educated groups and the groups with lower income gradually access the internet.

The answers related to the internet use are summarised below:

Table 8

Use of the internet

Use of the internet	2003	2004
daily	30.2	33.9
weekly	41.3	37.8
less often	28.5	28.3

The ones who surf daily are the respondents with tertiary education, in their thirties and forties, earning over 12 000 per month, the employees and entrepreneurs. The ones who surf weekly have secondary or primary education, 18-29 years of age, no income or the income of 8-12 000, residency in a municipality bellow 2 000 inhabitants or a town with the population between 20 and 100 000, and are mostly students and not working citizens. Those who use the internet less often are the apprenticeship graduates older than 50, with the income of 4-8 000, living in a municipality with less than 20 000 inhabitants, retired and sole traders.

Table 9

Time spent on the internet

Time spent on the internet	2003	2004
< 1 hour per week	34.9	34.8
1-5 hors per week	51.0	48.7
> 5 hours per week	14.4	16.5

In general, university graduates with an income higher than 12 000 use the internet for more than 5 hours per week. The respondents with secondary or primary education and the income between 12 and 20 000 surf for 1-5 hours per week and the ones who use the internet for less than an hour are mainly the respondents with apprenticeship certificates earning bellow 12 000. The other categories have remained statistically insignificant.

Table 10

Intensity of the internet use

Intensity of the internet use	> 5 hours		1-5 hours		< 1 hour	
	2003	2004	2003	2004	2003	2004
daily	42.6	44.1	51.9	51.0	5.6	4.9
weekly	2.0	4.3	73.6	79.1	24.3	16.6
less often	0	0	11.5	4.4	88.5	95.6

Both the researches have indicated that usually the internet users who connect more often spend more time on the internet. Moreover, this year research has revealed that the number of those who connect daily and spend more than 5 hours on the internet has slightly grown but the number of those who only connect sporadically and spend on the internet less than an hour weekly has increased considerably. The largest number of the internet users (30%) connect weekly and use the internet for 1-5 hours.

3.3.5 Use of the Internet Services

The internet offers a variety of means to use it. Both the researches demonstrate that most of the internet users connect in order to access the e-mail, to search for the information related to their work or study, to search for practical information (public transport timetables, weather forecasts, currency exchange rates, TV programmes, etc.) or to amuse themselves.

Other internet services and the characteristics related to their use are presented further on. All the internet services are generally used by the internet users with no difference, only some internet services are accessed by a specific group of users. This fact was revealed by the classification of the internet services based on individual socio-demographic signs of their users. The classification presenting the socio-demographic characteristics and comparing the results of the two researches is shown below:

Table 11

Classification of the internet services based on individual socio-demographic signs of their users

Internet services	% internet users		significant differences between the internet users	changes between 2003 and 2004
	2003	2004		

e-mail	67.5	75.2	3ary E:84%, 2ary E:77%, students:79%, sole traders:83%, entrepreneurs:94%	income not significant anymore
searching for theoretical information	66.1	68.8	20ies+30ies:72%, 1ary E:72%, 3ary E:84%, no income:81%, income>20 000:90%, students:88%, unemployed:75%, entrepreneurs:77%	specific group of users (categories <29 and <39)
searching for practical information	50.7	59.1	all the internet users	no differences
looking for amusement or games	53.7	58.2	<29:71%, 1ary E:72%, apprenticeship:63%, no income:76%, income>20 000:61%, students:79%, unemployed:76%, sole traders:60%, men:64%	no changes (used by the same groups)
searching for administration related information	41.7	50.3	30ies+40ies:71%, 3ary E:72%, income>8 000:60%, income>20 000:84%, employees:57%, entrepreneurs:71%	no changes (used by the same groups)
reading newspapers or magazines	37.1	46.6	3ary E:62%, income>20 000:70%	no differences
sending SMSs	36.0	35.2	<29:45%, 1ary E+2ary E:38%, no income:54%, income>20 000:42%, students:63%, unemployed:40%, sole traders:40%, entrepreneurs:48%	no changes (used by the same groups)
searching for consumer information	35.0	32.7	income>20 000:61%, sole traders:40%, entrepreneurs:71%, men:38%	specific group of users (higher income groups)
accessing bank services	21.7	23.3	3ary E:32%, income>12 000:43%, sole traders:40%, entrepreneurs:65%, men:30%	no changes (used by the same groups)
chatting	26.6	21.3	<29:35%, 1ary E:56%, no income:70%	no changes

			me:45%, students:54%, unemployed:30%	(used by the same groups)
downloading a software	25.2	20.4	1ary E:31%, 3ary E:25%, no income:30%, income>20 000: 42%, students:35%, men:27%, towns POP 20-50 000: 31%	specific group of users
searching for political information	24.7	20.7	3ary E:33%, income>12 000:30%, not working:23%, entrepreneurs:41%	no changes (used by the same groups)
sending electronic postcards	13.0	19.1	<29:25%, no income:27%, income>12 000:23%, students:35%, sole traders:23%, entrepreneurs:29%	no changes (used by the same groups)
downloading music (MP3)	15.7	18.5	<29:28%, 1ary E:44%, no income:34%, students:41%, entrepreneurs:29%, men:25%	no changes (used by the same groups)
purchasing products or services	9.8	13.2	income>20 000:19%, sole traders:23%, entrepreneurs:41%	specific group of users (higher income groups)
joining a discussion forum	9.2	8.4	no statistically significant differences	the differences have disappeared
listening to the radio	8.1	8.1	students:9%, sole traders:23%, entrepreneurs:11%	no changes (used by the same groups)
telephoning	7.0	6.2	entrepreneurs:35%, men:32%	specific group of users

There have only been minor changes of preferences towards individual internet services between 2003 and 2004. This year, the first six services (these are the most frequently used ones) seem to be used in a larger amount than last year. Also accessing bank services and sending electronic postcards were more frequently used in 2004 than in 2003.

As far as the users of individual internet services are concerned, there are some internet services which are accessed by a specific group of users. Within some internet services, the differences between the groups of users have disappeared - for example, all the internet users

with no differences surf in order to search for practical information (the 4th most popular service in 2003 and the 3rd most popular service in 2004). Administration related information (e-government services is the subject which is in focus of this research) was ranked as the 5th most popular service both in 2003 and 2004.

3.3.6 Influence of the Internet on Lives of its Users

Considering the fact that from those who do not want to get the internet 40% do not think they miss it, 13% do not think they need it and 12% do not show any interest in the internet, the internet users were asked whether the internet had changed their lives. 45.9% of the internet users gave a positive answer, 47.3% a negative one.

The internet has positively changed the lives of the respondents younger than 40 years of age (52%), with no income (56%) or an income higher than 12 000 per month (53%) - with higher income, the percentage of positive answers is significantly larger up till 74% within the highest income group (above 20 000 per month). With regard to work status, a positive answer was given mostly by students (63%), not working respondents (54%) and entrepreneurs (65%).

The respondents were given several areas to choose as beneficial or non beneficial. Their answers can be summarised as follows:

Table 12

Influence of the internet on lives of its users

Influence of the internet on:	positive	no changes	negative	do not know
accessing important information	89.9	9.9	0	0.2
communicating with distant people	78.0	17.6	0	4.4
saving time	73.2	20.7	3.9	2.2
influencing working life	66.6	25.7	1.9	5.7
contacting people	66.4	28.4	0.7	4.6
combining family and working life	50.5	40.7	1.1	7.7
accessing e-government services	49.0	42.2	1.3	7.5
saving money	41.8	36.5	15.6	6.2

Positive influence of the internet in all of the above mentioned areas was declared mainly by active, educated respondents and the respondents currently being educated. A slightly

provocative alternative - saving money (as the internet is considered to be a medium consuming rather than saving money) - was chosen mostly by those who had chosen the positive, not the negative answer. Accessing e-government services was ranked as positive by 49% of the respondents, although 42% do not perceive any changes (not positive, nor negative ones) in this area. Negative influence of the internet was only expressed in tiny amounts - with the exception of the last alternative.

The above presented answers could possibly influence indecisive or undecided respondents in their dilemma of connecting (and learning to use and using the internet) or not connecting. The above presented answers prove that the internet is - before all - a very effective means of improving one's life in many areas.

3.4 e-Government

The main aim of both researches (the 2003 one and the 2004 one) was to map the interest of the adult population of Slovakia in the services of e-government. Considering preferences towards individual internet services, searching for administration related information (laws, norms, registers, forms, applications) was selected by 20% of all the respondents - which is 50% of the internet users - and was ranked as the 5th most frequently used internet service.

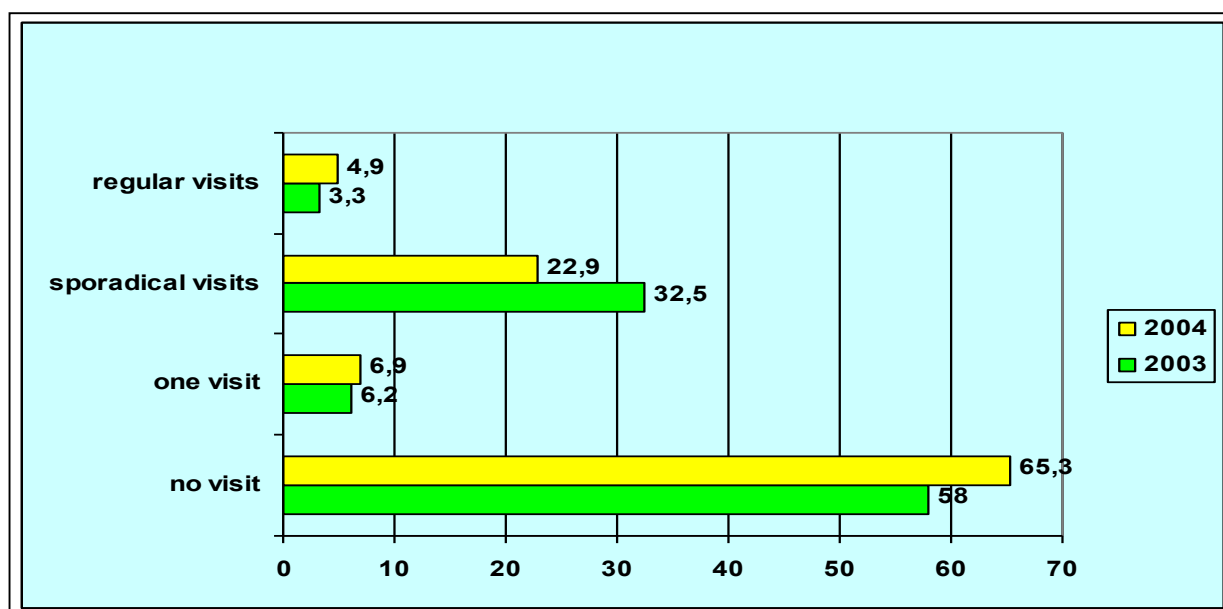
In the research of 2004, the experience of the previous research was taken into consideration and the interest in the services of e-government was measured in a different way. The answers were more general (except of the section related to www.obcan.sk) and did not depict concrete offices or concrete services. The information related to offices (central, regional or local ones) and the services of e-government should always be available to general public - in a case anyone finds themselves in a particular situation. However, not everyone experiences the same situations and - as a result - not everyone needs the same services. It was therefore difficult for the respondents to consider (naturally, on a hypothetical level) particular offices and particular services without having experienced the situations related to them. The answers tended to be confusing and misleading. Moreover, a large number of e-government services is designed for the entrepreneurs but - considering they only represent 1.8% of the sample - their answers could not be processed and presented as representative. General approach seems to be the most systematic one. The following presentation comprises also a comparison of the two researches.

3.4.1 The Office's web sites

In this section of the questionnaire, the respondents were asked if they had already visited a web site of the government, the parliament, offices of the higher tier territorial units or another offices in order to search for current information from their respective agendas. The answers of the two researches (the 2003 one and the 2004 one) are summarised and compared below:

Graph 6

Visiting web sites of the offices (percentage of the internet users)



In 2004, 34.7% of the internet users visited a web site of the government, the parliament, offices of the higher tier territorial units or another offices - this number has declined by 7% in comparison with 2003. The number of the regular visitors has increased by 1.6%, the number of the sporadical ones has decreased by 9.6%. A single visit has almost the same percentage in both researches (6.2% in 2003 and 6.9% in 2004).

The offices' web sites are significantly more often visited by the internet users above thirty years of age (in their thirties: 38.5%, in their forties: 44.7% and 46% of those older than 60), university graduates with an income higher than 12 000 per month, employees (40%) and entrepreneurs (53%), from the towns with population of 2-50 000 (41%) or above 100 000 (39%). The only difference between 2003 and 2004 is that this year, offices' web sites have been visited also by the internet users a decade younger than last year.

The frequency of visits was not measured this year. Last year, the frequency of visits was as follows:

Table 13

The frequency of offices' web sites visits

offices' web sites	number of visits	% population	% internet users
Taxation Office	65	5.8	17.6
Government Office	51	4.5	13.8
Ministry of Labour, Social Affairs & Family	50	4.4	13.6
Ministry of Finance	49	4.4	13.3
Ministry of Justice	33	2.9	8.9
Statistical Office	33	2.9	8.9
National Council	31	2.8	8.4
Ministry of Interior	31	2.8	8.4
Office of the President	28	2.5	7.6
Offices of the Higher Tier Territorial Units	28	2.5	7.6
Ministry of Health Service	26	2.3	7.0
Ministry of Environment	19	1.7	5.1
Ministry of Foreign Affairs	17	1.5	4.6
Ministry of Agriculture	8	0.7	2.2
Ministry of Defence	4	0.4	1.1

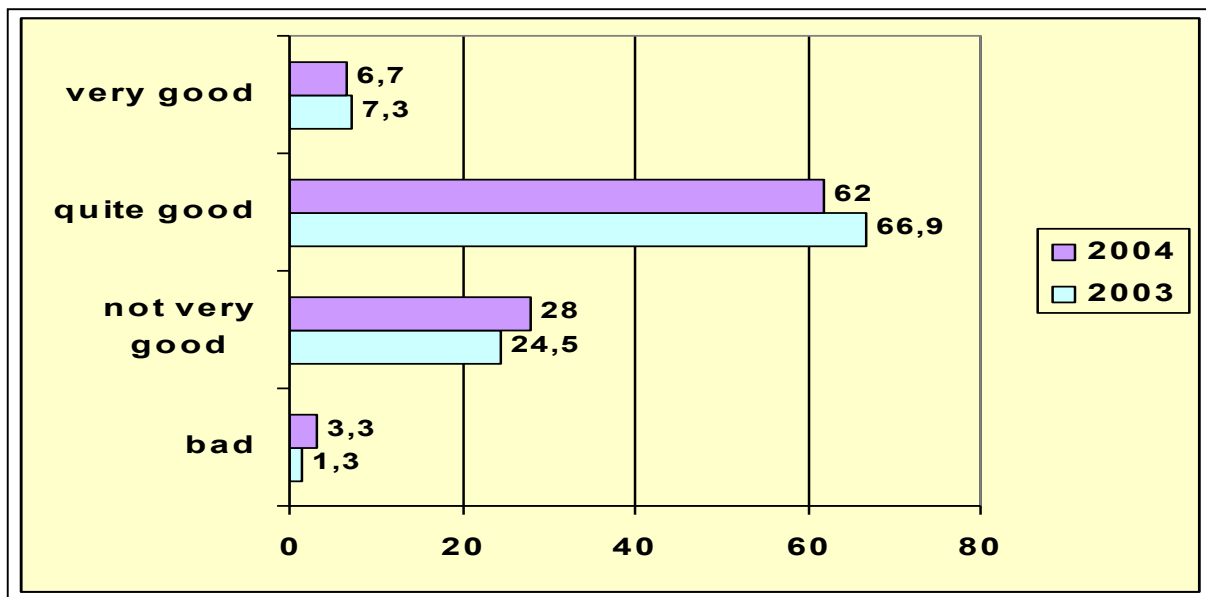
The table indicates that only a minor part of the internet users visit individual offices (with the exception of taxation offices, offices of the higher tier territorial units and the most exposed ministries). The interest of those who visit the other offices' web sites is obviously connected with specific (work or study related) orientation.

Further on, the respondents were asked to express their satisfaction (or dissatisfaction) with the information found on the offices' web sites. This part of the questionnaire could only be answered by those who had already visited some of the offices' web sites - their number represented 34.7% of the internet users and 13.5% of the population. 68.7% of the answers were positive (5.5% less than in 2003) and 31.3% negative (5.5% more than in 2004). This means that even if there were less visits, the visitors were more critical in 2004. There were not

specific groups of user who would be choosing positive (or negative) answers - there were no differences between individual socio-demographic groups. The results of the two researches are presented below:

Graph 7

Experience with the offices' web sites

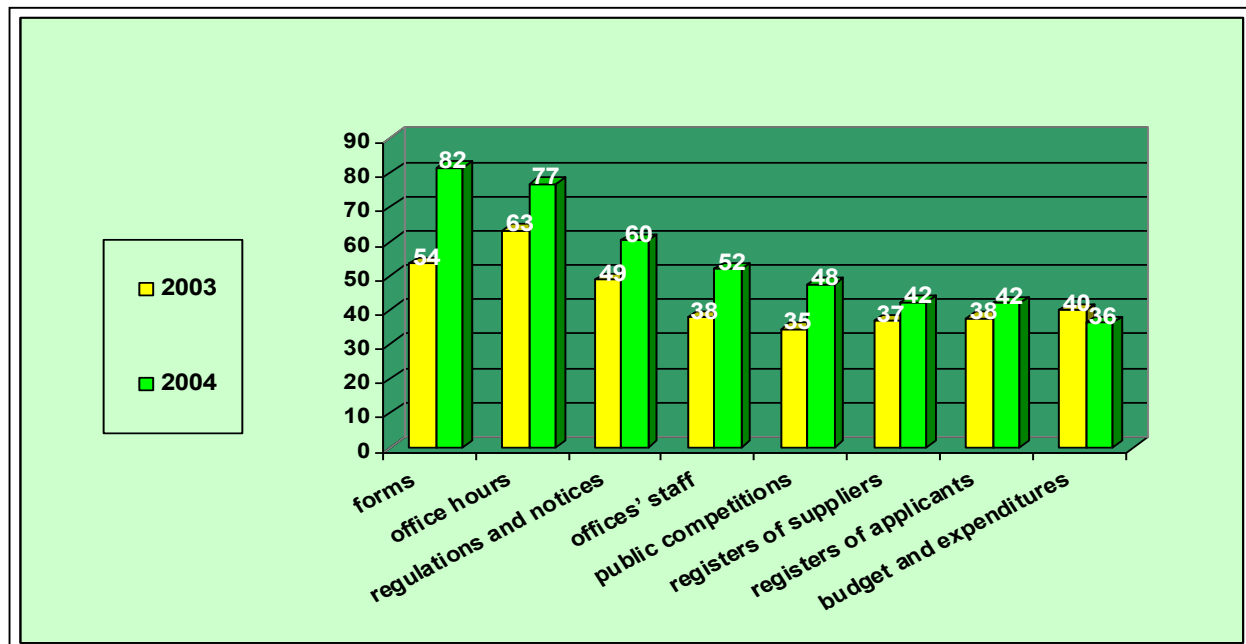


The web sites closest to the internet users are the ones run by municipalities. Last year, 65% of the internet users were familiar with the web site of their municipality. Both in 2003 and 2004, the respondents were asked what kind of information they usually search for and expect to find on local or regional web sites.

Between the two researches, the interest in all kinds of information (except those related to budgets and expenditures of the offices) has increased. The order of information in demand has only slightly changed. The internet users search mostly for the forms and the information about procedures related to the offices' agendas (here, the figure has risen by 28%). The office hours were ranked as the second, regulations and notices as the third. Quite a lot of the internet users were interested in the offices' staff or public competitions offered by the offices. They were much less interested in budgets and expenditures of the offices. The order of information in demand is presented below:

Graph 8

The order of information in demand on local or regional web sites



Majority of the presented alternatives were selected by active, educated respondents, with higher income, from small municipalities with population lower than 2 000 or from towns with 20-100 000 inhabitants.

Both in 2003 and 2004, the internet users expected to find the information simplifying procedures related to the offices' agendas (forms, procedures, office hours) and documents regulating and conditioning various activities (regulations and notices). Information enabling regulation and supervision of the offices' activities (budgets, expenditures, registers of suppliers, registers of applicants, etc.) seemed to be less demanded.

3.4.2 "www.obcan.sk"

In both researches, a whole section of the questionnaire was focused on the information portal "www.obcan.sk". 29.2% of the internet users (11.5% of the population) are familiar with "www.obcan.sk" which is a figure 10% lower than last year. The profound difference between the results in 2003 and in 2004 can most probably be caused by the fact that last year, there was more information about "www.obcan.sk" in the media because it was being launched at the moment. As there has not currently been any publicity for "www.obcan.sk", it has not been introduced or reintroduced to general public. Consequently, less respondents were informed about "www.obcan.sk" in 2004 than in 2003.

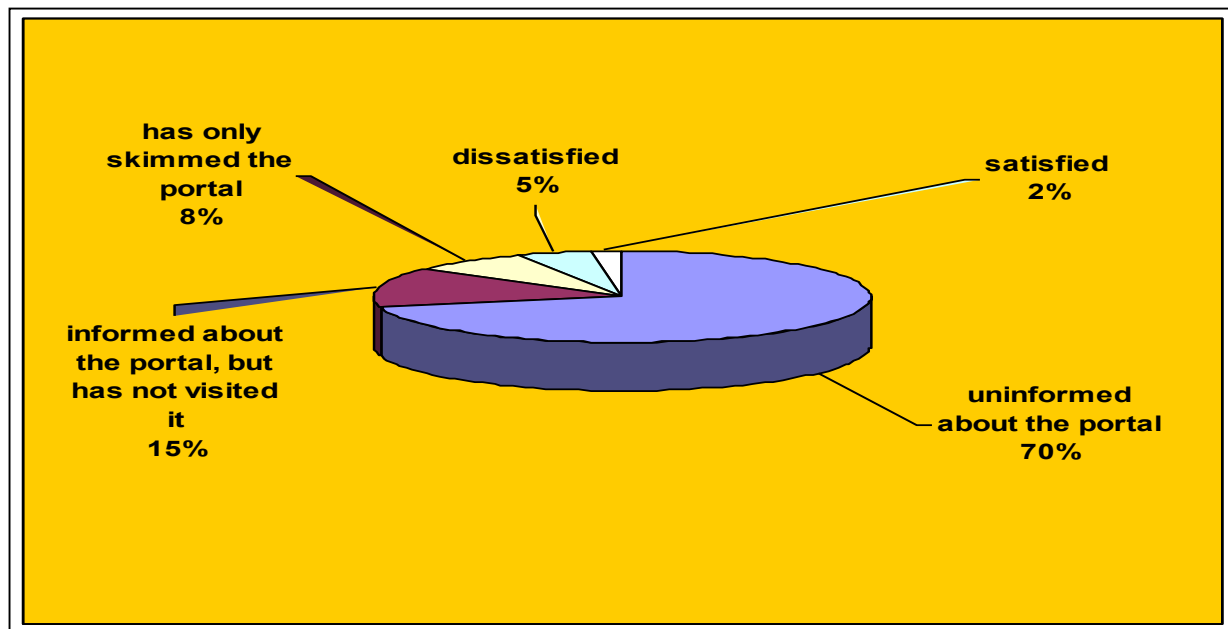
The internet users informed about the information portal "www.obcan.sk" are mostly men (33.8%), entrepreneurs (58.8) or retired (40%), with an income higher than 20 000 per month.

As far as information sources presenting "www.obcan.sk" to general public are concerned, the internet users know the portal mainly from electronic media (12.3% of them), from the internet (9.5%) and from the press (8.8%). 6.9% of the internet users know the portal from other information sources (conferences, conversation, etc.).

So far, only 14.7% of the internet users have visited "www.obcan.sk" - this is 11.5% of the respondents (just 133 respondents in total). The respondents were also asked to evaluate the portal, but their answers are not presentable in percentage. Generally, if the alternatives given to evaluate the portal are summarised under "positive experience" and "negative experience", the results can be presented as follows:

Graph 9

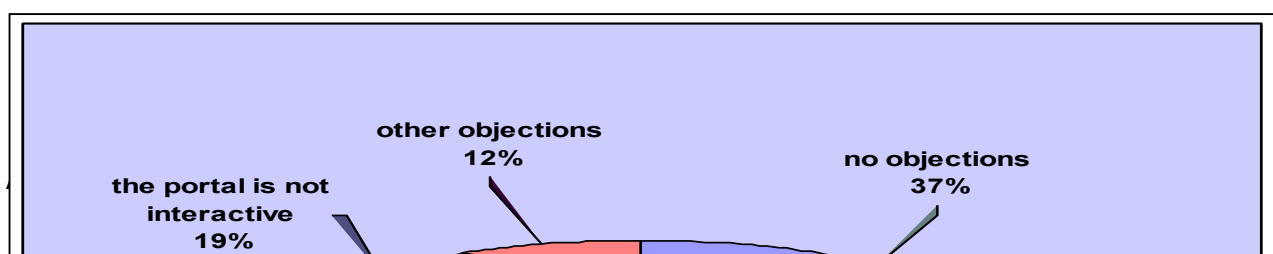
"www.obcan.sk" - experience of the respondents



Similar results were obtained when the internet users were questioned which elements - in their opinion - were absent on the portal. As most of the respondents were not informed or familiar with "www.obcan.sk", only 67 respondents could answer this question. The results are shown below:

Graph 10

"www.obcan.sk" - objections of the respondents



The answers of such a small amount of respondents can not be interpreted and generalised. Such issues can only be dealt with in the researches among the internet users - not in the public opinion polls comprising only a certain number of the internet users and just a minor proportion of those who use the services of e-government, as well as the information portal "www.obcan.sk".

The questions focusing on "www.obcan.sk" (evaluation of the portal) were included in the research on the assumption that familiarity with the portal had risen within the period between the research of 2003 and the research of 2004. 40.9% of the internet users visited the portal last year and it was expected that this number would increase. Another reason for adding the questions concerning evaluation of the portal was the fact that according to "naj.sk", the number of visitors of "www.obcan.sk" was four times higher in 2004 than in 2003. In 2003, 49899 sessions were recorded on the portal from its introduction until September. In 2004, 208 346 sessions were recorded until September - when these figures are calculated per month, the number of sessions doubled between September 2003 (12 474 per month) and September 2004 (26 043 per month). The information portal "www.obcan.sk" is the most visited e-government web site after "www.mesto.sk" (www.town.sk) with its 467 962 sessions. However, it is probably visited by a particular group of the internet users with concrete professional needs.

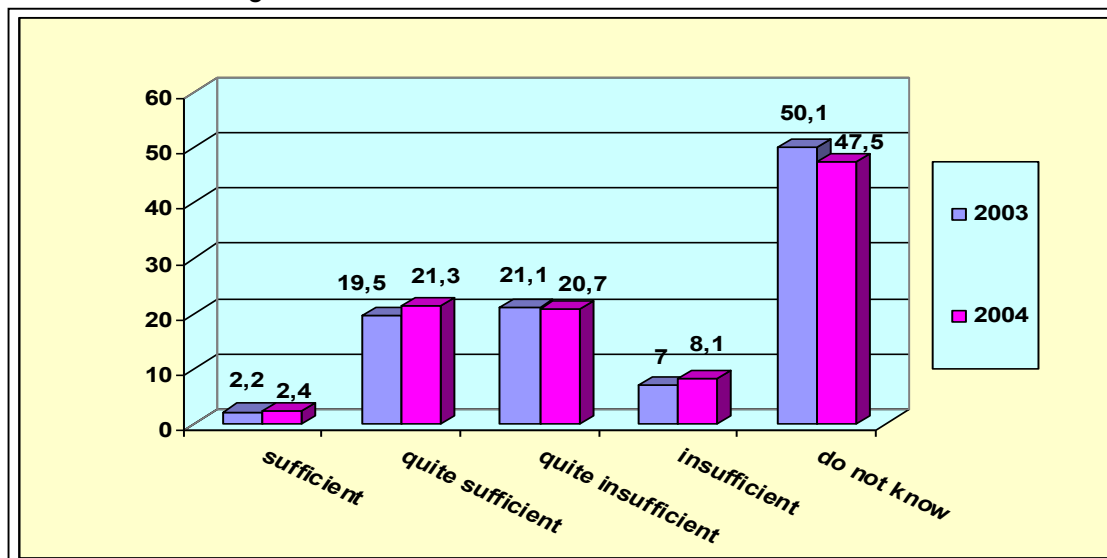
The internet users who visit and use the offices' web sites were also asked to show their opinions on quality of e-government services. Comparison of their answers in the two researches is presented further on. Out of the internet users, 50.1% in 2003 and 47.5% in 2004 did not attempt to evaluate the services of e-government as they did not feel competent enough. Positive attitude was expressed by 21.5% in 2003 and 23.7% in 2004, negative attitude by

27.1% in 2003 and 28.8% in 2004 - although extremely negative approach was only shown by 1.1% of the internet users this year.

The respondents expressing negative feelings were mostly the ones with primary education, in their thirties, potential voters of SMK (41.7%), HZDS and KDH, with no other socio-demographic signs. The respondents with tertiary education (35%), in their forties (34.7%), with no other socio-demographic signs tended to show positive feelings.

The results of the two researches indicate, that the attitude of general public towards e-government services is not improving but seems to remain on the same level (perhaps it is even becoming worse). The issue that has to be considered at this point is publicity related to e-government services: the notion and expectations of general public. Both researches show that some improvements in the services of e-government have remained unnoticed: publicity of the real-estate registry (although paid and limited), better quality of the business registry, positive changes in the e-services of taxation offices, etc. This can be caused by the fact that these services are mainly used by a specific group of the internet users, not by general public.

Graph 11 Evaluation of e-government services

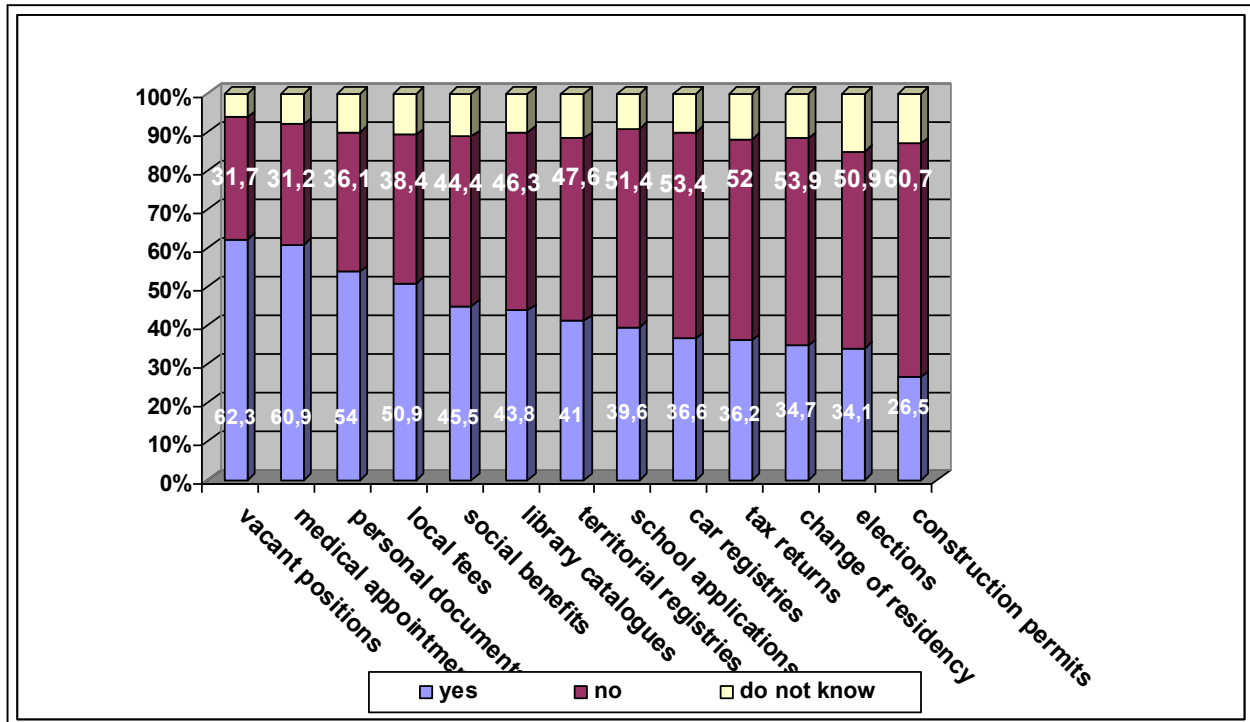


3.4.3 Interest in the Services of e-Government

In the last year research, the respondents were presented with 13 most frequently used e-government services and asked a hypothetical question whether they would be interested in such services. The respondents reacted like this:

Graph 12

Interest in e-government services in 2003 (percentage of respondents)

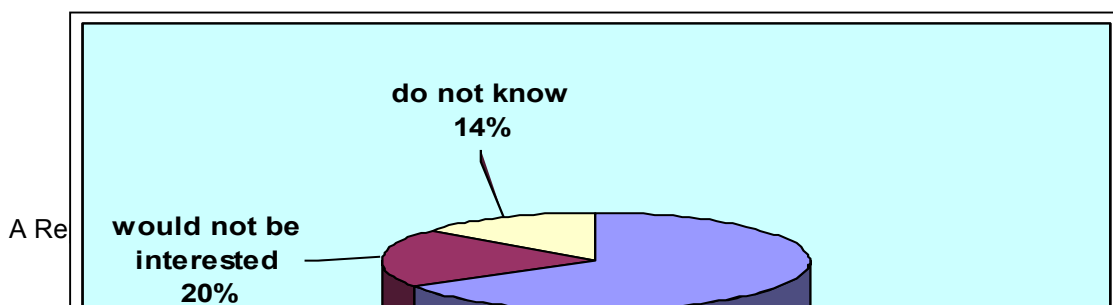


The reasons why the questions in this year research were more general are presented above. Not everyone needs the 13 services (or all of the 13 services) shown in the graph and the respondents might consider it difficult to decide whether they would or would not access the 13 services. The important question is if they would (under certain circumstances) use the services of e-government in general. According to the answers, two thirds of the respondents who are familiar with the internet would be interested in using the services of e-government.

Positive answer came mostly from the respondents younger than 50 (74%), with tertiary (80%) or secondary (70%) education, with an income above 12 000 per month (83%) or no income (71%), entrepreneurs (80%), students (79%), sole traders (76%) and employees (70%), potential voters of SDKÚ (93%), SF (79%) and ANO (75%). The answers related to the interest in e-government services can be presented as follows:

Graph 13

Interest in e-government services (percentage of the internet users)



It is obvious that general public shows great interest in the services of e-government which provide a chance to simplify and expedite the procedures of various office agendas. However, the services of e-government have to be available at anytime and accessible to anyone - this is the precondition of their use by general public. There is no need to wait for higher penetration of the internet and create the services. It has to be done vice-versa by creating the services available and accessible 24 hours a day to every single citizen: employed or unemployed, young or old, educated or uneducated...

At the moment, there is an urge to make use at least of those e-government services which exist already. In order to make it possible, there has to be greater publicity: more visible and more effective. People are not sufficiently informed about the services of e-government and do not use them - they do not know how to use them, they do not know how to find them or they simply do not know they exist.

Nevertheless, the problem of interest or lack of interest in the services of e-government is closely linked to the problem of interest or lack of interest in the internet itself.

4 QUESTION INSTEAD OF A CONCLUSION: WHAT COULD POSSIBLY INCREASE THE INTEREST OF GENERAL PUBLIC IN THE INTERNET?

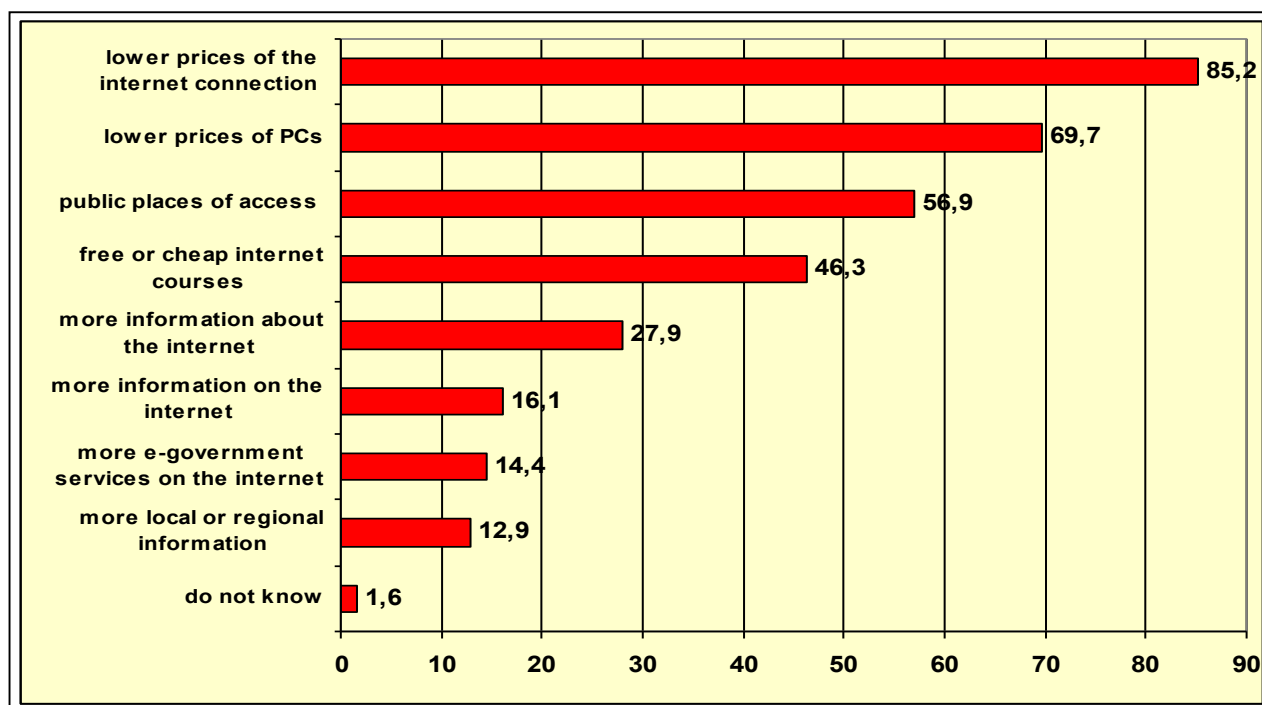
This is the question which worries a large number of those who are responsible for the "internetisation" of Slovakia. In the questionnaire, it was given to all the respondents (except the ones who do not know what the internet is).

The answers indicate that the barriers are mostly financial: majority of the respondents think that lower prices of PCs and the internet connection would improve the situation. Almost

57% suggest that also public internet access points (libraries, tele-houses, etc.) with really low prices could make the situation better. The respondents also believe that free or cheap internet courses are a reasonable means of making the internet more approachable. As far as more information about the internet or more information on the internet are concerned, the respondents do not consider them to be important in the matter. The answers of the respondents are summarised below:

Graph 14

What could possibly increase the interest of general public in the internet?



Lower prices of the internet connection would attract new internet users according to the respondents in their twenties and thirties, from the towns with population over 100 000. Lower prices of PCs could attract new internet users in the opinion of the respondents in their twenties and thirties, with secondary or tertiary education, living in the towns of 20-100 000 inhabitants. Those who think that public internet access points can intensify the "internetisation" are mainly less than 30 years old, with primary, secondary or tertiary education, with no income or an income of over 20 000 per month. Free or cheap internet courses seem to be a good idea for the respondents with apprenticeship certificates. More information about the internet or more information on the internet were the alternatives chosen by the respondents with no significant differences. Mostly the respondents in their forties, university graduates, with an income higher

than 20 000 per month, entrepreneurs or sole traders selected the alternatives of more e-government services on the internet or more local or regional information as the best ways of deepening the "internetisation".

Public internet access points seem to be a suitable solution - it can not be expected that the prices of PCs and the internet connection will dramatically drop and become affordable for all the social groups. Public internet access points are non-commercial facilities created with the support of public administration, third sector or various commercial subjects. Prices for the internet at such facilities is really low and affordable for all the social groups.

Further on, the respondents were asked which public internet access points would be - according to them - most convenient. Tele-houses or communication centres furnished with PCs, communication equipment and helpful staff were ranked as suitable options by 75.8% of the respondents. 74.1% chose libraries, post offices, municipal halls or schools as acceptable. 48% opted for the "internet machines" - an internet machine being a facility similar to a telephone box, with slightly different functions. 7.6% of the respondents presented different ideas or had no ideas at all.

Public internet access points can certainly contribute to intensify the "internetisation" and increase public interest in the internet. This could be one of the factors breaking a barrier to access the e-government services and could lead to higher public interest in the services of e-government. Moreover, increasing proportion of digital literacy correlates with improving quality of life and work. Active use of the internet accelerates expansion of the information. It also facilitates its circulation and acquisition, consequently affecting education. It definitely broadens one's mind.

The results of the research are by no means alarming. In comparison with the neighbouring countries (just like in comparison with the old or the new EU members), penetration of the internet and informatisation of the society (and of the public administration) in Slovakia seem to be rather dormant.