

i2010 Annual Report 2007



Estonia has well-advanced infrastructures and use, and in many respects tops the EU. It does have some weaknesses but it is by far the most advanced of all new Member States from the enlargements of 2004 and 2007.

Estonia Today

The number of households and enterprises with broadband access is above the EU average and while others have overtaken it in the past year, its growth is still relatively high. The broadband-to-narrowband ratio is high with significant competition between alternative platforms. Use of internet services among citizens is above the EU average, and for content, media, reading online newspapers and internet phone services they are amongst the highest in Europe. The country's above average broadband penetration and the citizens' strong use of audiovisual content online do not, however, seem to translate into a local commercial market for digital content – possibly due to the market's limited size. 3G and digital TV have not yet developed.

eGovernment has developed very quickly, in terms of supply and use. The government reached full saturation for enterprises with all services available for full transactions and is high for citizen services. On overall use by citizens and enterprises, some countries have developed faster than Estonia during the last year, pushing its levels closer to the average. For advanced use Estonian is still close to the top in Europe. Schools are top performing for broadband connectivity but the number of PCs per student and use of computers in class are lacking.

Skill levels have dropped from slightly above to slightly below the EU average, perhaps reflecting work migration patterns. ICT-use among enterprises is behind citizen use, and below the EU average. However, there is now progress for enterprise use in several areas.

Estonian ICT Policy

Estonia singles out the formation of a knowledge society as one of its strategic goals. Special emphasis is put on the widespread attainment of ICT-skills and 2006 saw the successful implementation of measures in this and other fields:

ICT-Skills and eLearning: the eLearning Development Plan for General Education 2006-2009 was approved and is being implemented. The objective is to strengthen ICT skills in general education and vocational training.

eGovernment: Great attention is devoted to improving conditions for businesses through ICT: business registration and notary services are electronic. Citizens also profit from an expanding range of online government services: in 2006 Estonians could vote electronically for the first time in local elections, in 2007 electronic voting will be used for general elections.

The newly formulated **Estonian Information Society Development Plan 2007-2014** focuses on three goals: economic growth should be ICT-driven, all citizens should have access to ICT, and ICT should be used to increase the efficiency of the public sector.

Broadband	2003	2004	2005	2006	EU25	Rank
Total DSL coverage (as % of total population)			90.0		87.4	13
DSL coverage in rural areas (as % of total population)					65.9	
Broadband penetration (as % of population)		8.6	12.1	17.2	15.7	9
DSL penetration (as % of population)		4.2	5.8	8.4	12.8	15
Predominant download speed						
Households having broadband (as % of those having access to the internet at home)		66.0	76.8	80.3	62.1	7
% of enterprises with broadband access		67.7	66.6	75.7	74.5	12
Number of 3G subscribers per 100 inhabitants			0.1		5.0	18
Digital Television in households			8.5		30.6	16
Music: number of single downloads per 100 inhabitants			0.0			15
Internet Usage						
% population who are regular internet users		44.7	53.6	56.3	46.7	11
Take up of internet services (as % of population)						
Sending emails		38.8	48.8	49.4	43.8	12
Looking for information about goods and services		32.3	41.1	44.3	42.9	12
Internet telephoning or videoconferencing			10.2	14.3	7.1	3
Playing/downloading games and music		19.6	24.5	27.9	18.2	6
Listening to the web radio/watching web tv		13.3	15.0	16.5	11.8	10
Reading online newspapers/magazines		37.9	45.6	50.3	19.0	3
Internet banking		35.0	44.6	48.2	22.0	7
Places of access						
% at home		32.2	40.3	46.0	42.6	12
% at work		20.5	19.7	27.6	23.0	11
% at educational place		12.4	7.5	11.3	8.0	9
% at PIAP		14.5	3.2	3.7	6.8	20
eGovernment Indicators						
% basic public services for citizens fully available online		36.4		63.6	36.8	4
% basic public services for enterprises fully available online		100.0		100.0	67.8	1
% of population using e-Government services		20.3	31.1	28.6	23.8	12
of which for returning filled in forms		13.1	16.6	17.1	8.1	5
% of enterprises using e-Government services		83.9	69.9	69.1	63.7	16
of which for returning filled in forms		54.3	49.9	54.4	44.8	10
ICT in schools						
Number of computers connected per 100 pupils				7.2	9.9	20
% of schools with broadband access				95.0	67.0	1
% of teachers having used the computer in class during the last 12 months				59.7	74.3	23
e-Commerce						
E-commerce as % of total turnover of enterprises		2.8	2.0		11.7	
% enterprises receiving internet orders		8.7	7.2	14.4	13.9	13
% enterprises purchasing on the internet		31.0	23.3	25.0	37.9	15
e-business. % enterprises:						
with integrated internal business processes		27.7	24.6	23.8	37.3	19
with integrated external business processes		4.9	4.5	8.9	13.5	19
Security: % enterprises using Secure servers		14.5	20.5	22.7	41.0	18
% using digital signatures for authentication		5.3	9.0	10.9	14.3	13
Employment and Skills						
% employees using computers connected to the Internet		26.9	38.4	33.3	36.1	15
% of persons employed with ICT user skills.	17.0	17.2	19.4	17.1	18.5	19
% of persons employed with ICT specialist skills	2.3	2.4	2.6	2.6	3.1	20
Indicators on growth of ICT sector and R&D						
ICT sector share of total GDP					5.5	
ICT sector share of total employment					4.0	
ICT sector growth (constant prices).					3.6	
R&D expenditure in ICT by the business sector, as % of GDP					0.3	
=== as % of total R&D expenditure					25.7	