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Global GovTech Industry Overview Q2 2022

August 2022

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Teaser

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Contents

Introduction

Welcome to the second edition of the "Global GovTech Report" for the second quarter of 2022, which includes case studies that examine the use of GovTech solutions, an overview of next-generation technologies, and a collection of advanced analytics on the industry. We hope that the useful information presented here will be used by our stakeholders.

We at Deep Knowledge Analytics believe that data has great power. The go-to digital resource for unique insights and analysis on the opportunities, challenges, and trends to follow in the GovTech sector is the "Global GovTech Report Q2 2022." The interactive report offers a current summary of the most significant advancements in this quickly developing subject by drawing on a variety of data sources. The report's conclusions are presented in an intuitive style, with significant data being highlighted in a dashboard powered by artificial intelligence. As a result, it is simple to recognize the most significant trends and advancements in the GovTech industry.

Globally, the government IT sector is expanding as nations rush to modernize their administrations. Approximately 930 GovTech businesses and 1,430 investors are profiled in this research based on their global commercial activity and potential for innovation. The UK and Australia have the most government technology companies in their respective regions, although the US continues to be the leader in this field. In accordance with their digital transformation plans, a number of nations have advanced their GovTech agendas.

Executive Summary

Life expectancy has significantly increased over the past century as a result of a number of causes, including better lifestyles, growing living standards, and developments in medicine and healthcare. According to the most recent information from the WHO, 73 years old is the expected global life expectancy at birth for both sexes. For the first time ever, adults 60 and older will outnumber children under five in 2020.

These astounding advancements are the result of better public health, better nutrition, better healthcare, and most recently, technology breakthroughs, big data, and artificial intelligence to extend healthy life expectancy and satisfy the needs of an ageing population.

As new technologies proliferate, individuals will be able to live longer, healthier lives at all ages, which will increase longevity and promote healthy ageing. For instance, technological advancements have been used to promote independent living, such as by detecting falls, intelligent home technology, early disease detection, and management of disease conditions, as well as to keep people physically active, reduce social isolation, and maintain their participation in the workforce.

930+
Companies

1550+
Investors

~150
Ministries

10
Categories

61.1%
Companies in North America

62%
Investors in North America

40%
Companies estimated of $1M - $10M revenue

Japan
Highest HALE* in the world

Notes: *Health Adjusted Life Expectancy (HALE) is a measure of population health that takes into account mortality and morbidity

Report Methodology and Approach

Database

900+ Companies	1,400+ Investors	10 Subsectors

Data Sources

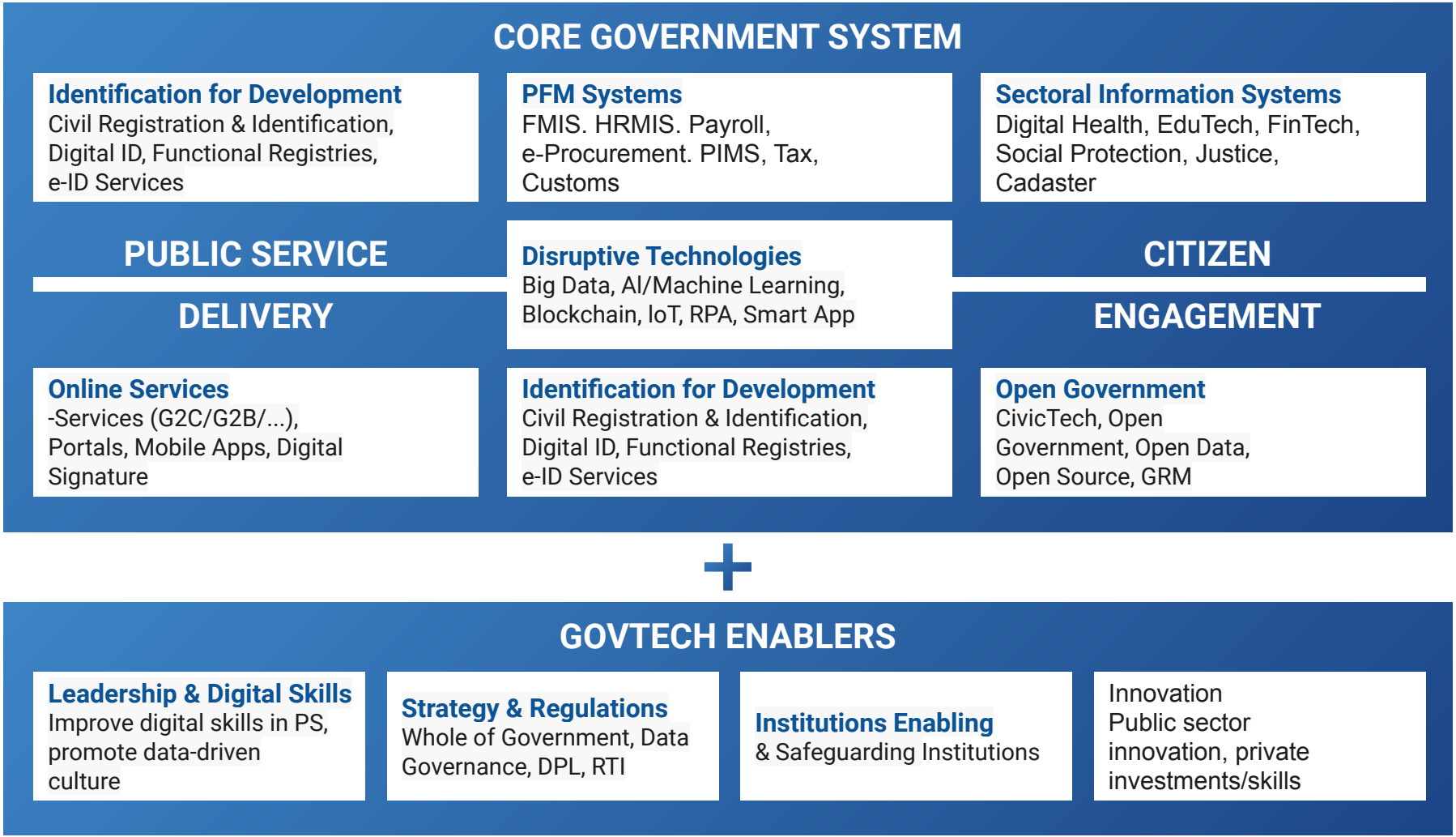
- Media Overview
- Industry Specialised Databases
- Publicly Available Sources
- Industry Reports and Reviews

Applied Research and Analytics Methods

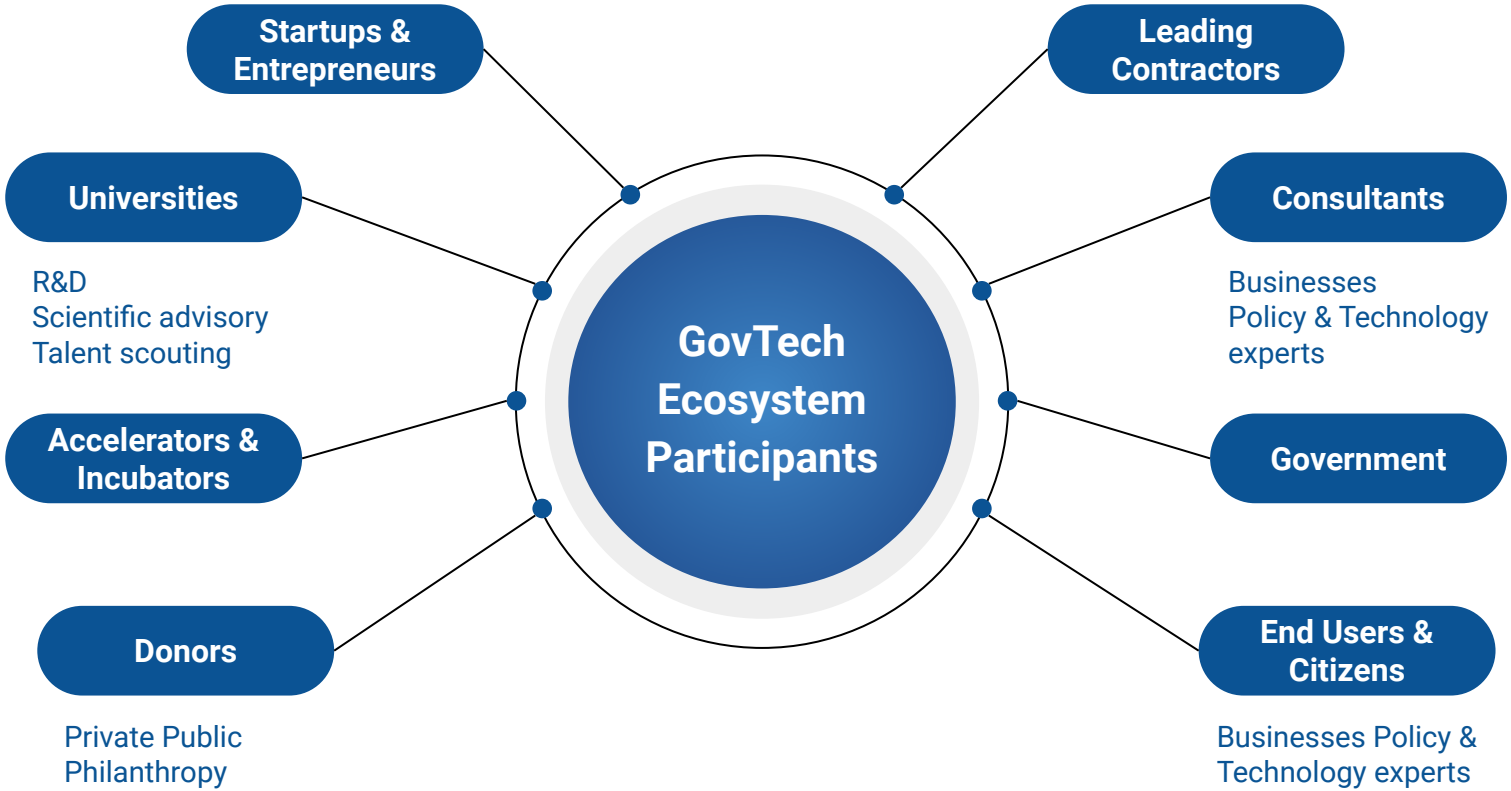
- Descriptive Analysis
- Mixed Data Research
- SWOT Analysis
- Comparative Analysis
- Qualitative Data Collection
- Data Filtering

The report, which provides a thorough overview of the GovTech industry, makes use of a variety of research strategies and analytical tools. Although there are many different opinions on what constitutes government technology, our definition is based on industry research, ecosystem feedback, and professional counsel. This definition served as the basis for this report's study. Deep Knowledge Analytics makes every effort to reduce potential risks by cross-checking data and utilizing various analytics approaches, but we cannot be held liable for the accuracy of the secondary data offered here. Please be aware that we did not purposefully leave out some companies from our study because of the way the data was filtered or other issues we ran across. Their exclusion was actually primarily due to missing or partial information in the sources that were available.

* - grouped by, but not limited to


CORE GOVERNMENT SYSTEM
Identification for Development
Civil Registration & Identification, Digital ID, Functional Registries, e-ID Services
PFM Systems
FMIS. HRMIS. Payroll, e-Procurement. PIMS, Tax, Customs
Sectoral Information Systems
Digital Health, EduTech, FinTech, Social Protection, Justice, Cadaster
PUBLIC SERVICE DELIVERY
Disruptive Technologies
Big Data, AI/Machine Learning, Blockchain, IoT, RPA, Smart App
CITIZEN ENGAGEMENT
Online Services
-Services (G2C/G2B/...), Portals, Mobile Apps, Digital Signature
Identification for Development
Civil Registration & Identification, Digital ID, Functional Registries, e-ID Services
Open Government
CivicTech, Open Government, Open Data, Open Source, GRM
GOVTECH ENABLERS
Leadership & Digital Skills
Improve digital skills in PS, promote data-driven culture
Strategy & Regulations
Whole of Government, Data Governance, DPL, RTI
Institutions Enabling
& Safeguarding Institutions
Innovation
Public sector innovation, private investments/skills

GovTech Ecosystem Framework



Global Govtech Industry

Overview

GovTech Industry at a Glance

930+
Companies

1,430+
Investors

53%
Covered by top 3 subsectors

10
Subcategories

50+
Hubs & Accelerators

61%
US-based companies

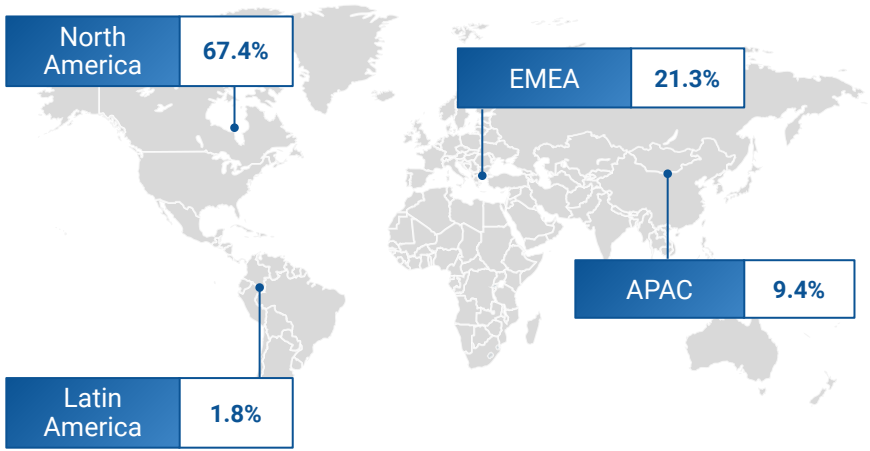
40%
Companies estimated of $1M - $10M revenue

$565.7B
Government IT Spending in 2022

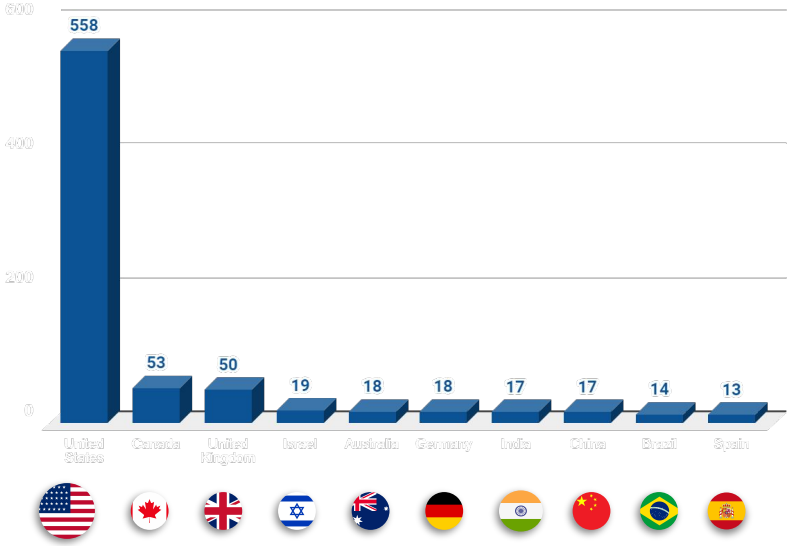
Sources: (1) Gartner

Regional Distribution of GovTech Companies

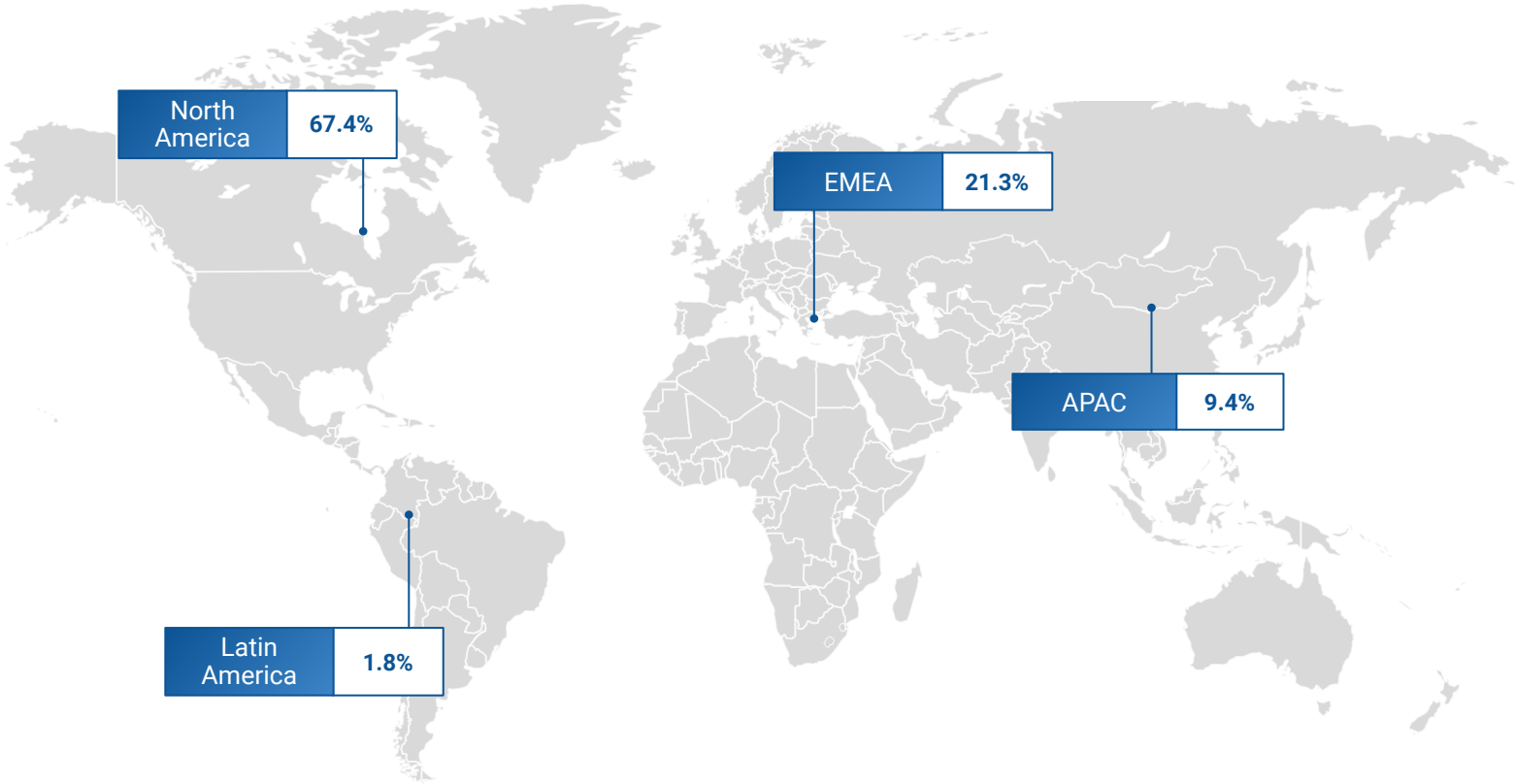
GovTech Companies by Regions, 2022

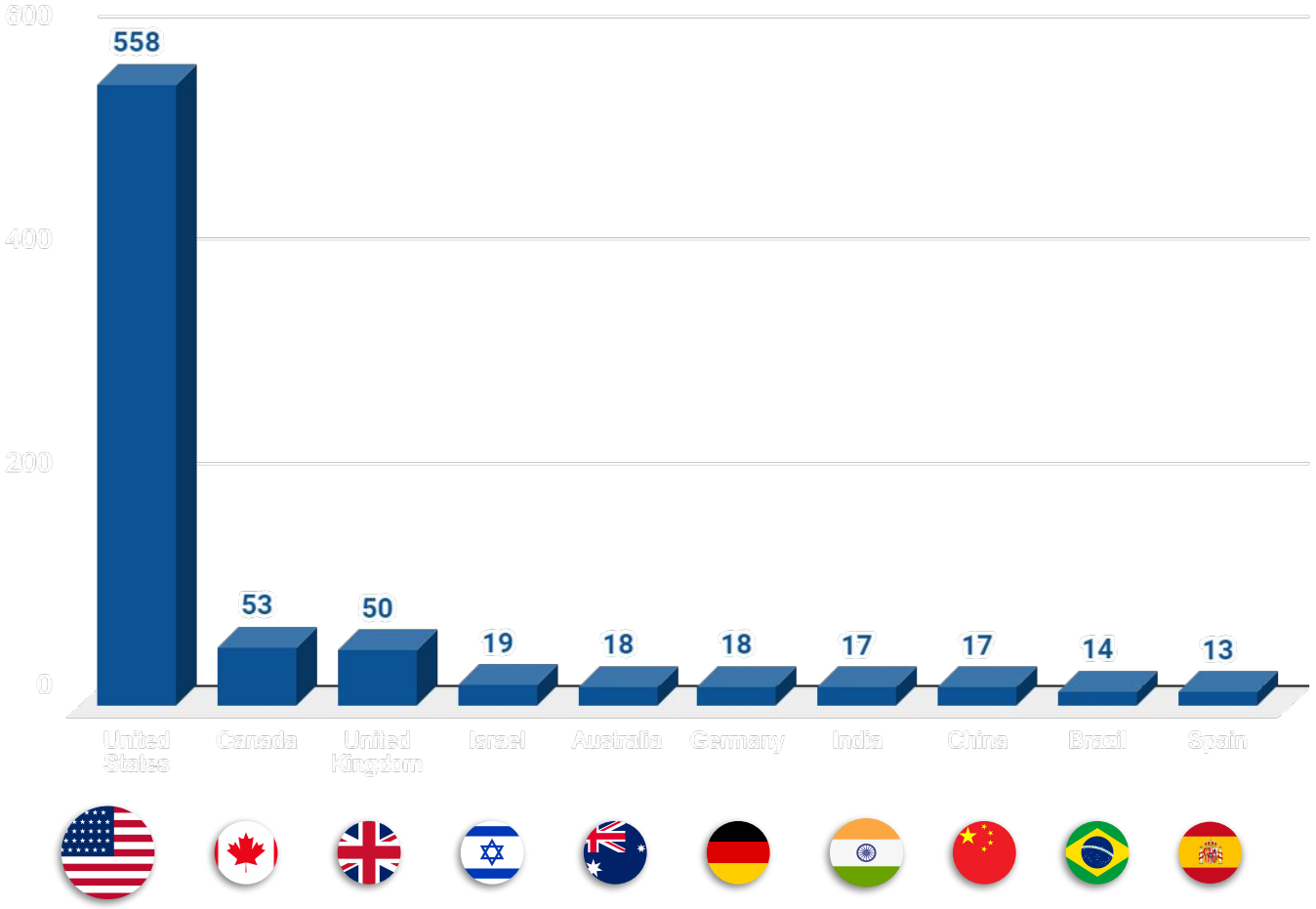


Top 10 Countries by the Number of GovTech Companies, Q2 2022



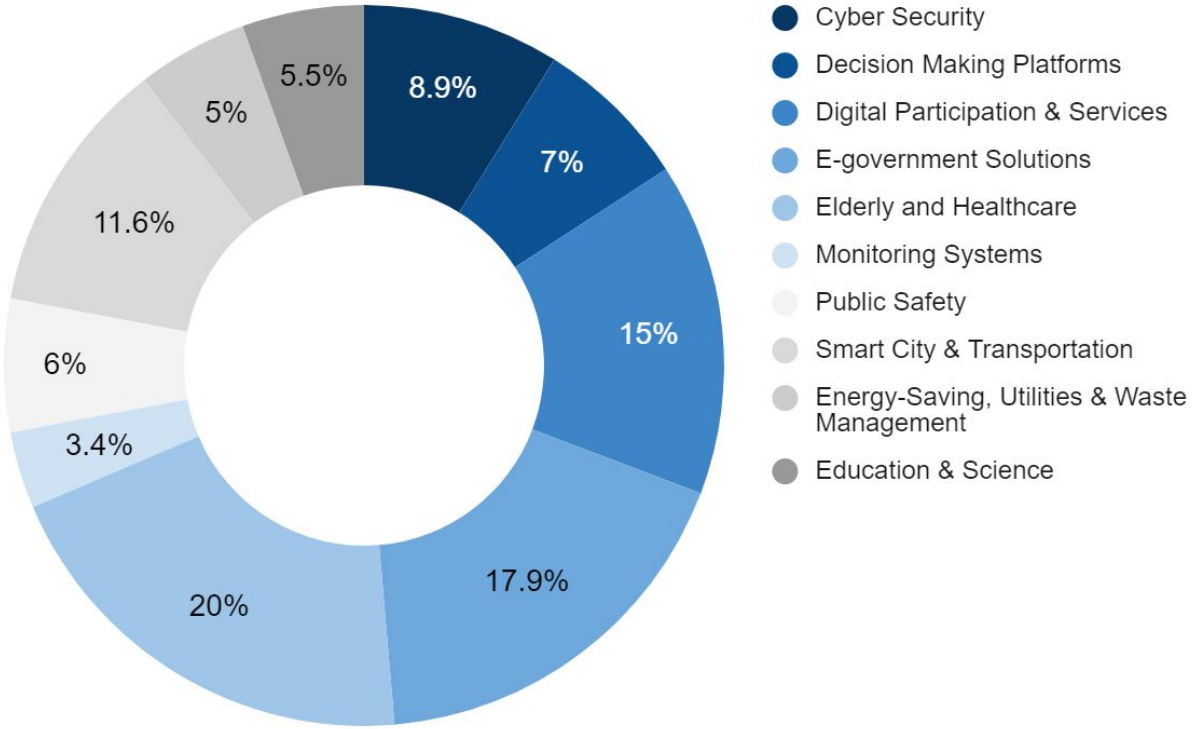
More than 67% of GovTech companies are located in North America. The second biggest region by companies' location is EMEA with a more than 21.2% share. The top 3 countries by the number of analysed companies are the United States (558), Canada (53), and the United Kingdom (50).


North America
67.4%
EMEA
21.3%
APAC
9.4%
Latin America
1.8%


600
400
200
0
558
53
50
19
18
18
17
17
14
13
United States
Canada
United Kingdom
Israel
Australia
Germany
India
China
Brazil
Spain

GovTech Companies by Subsectors

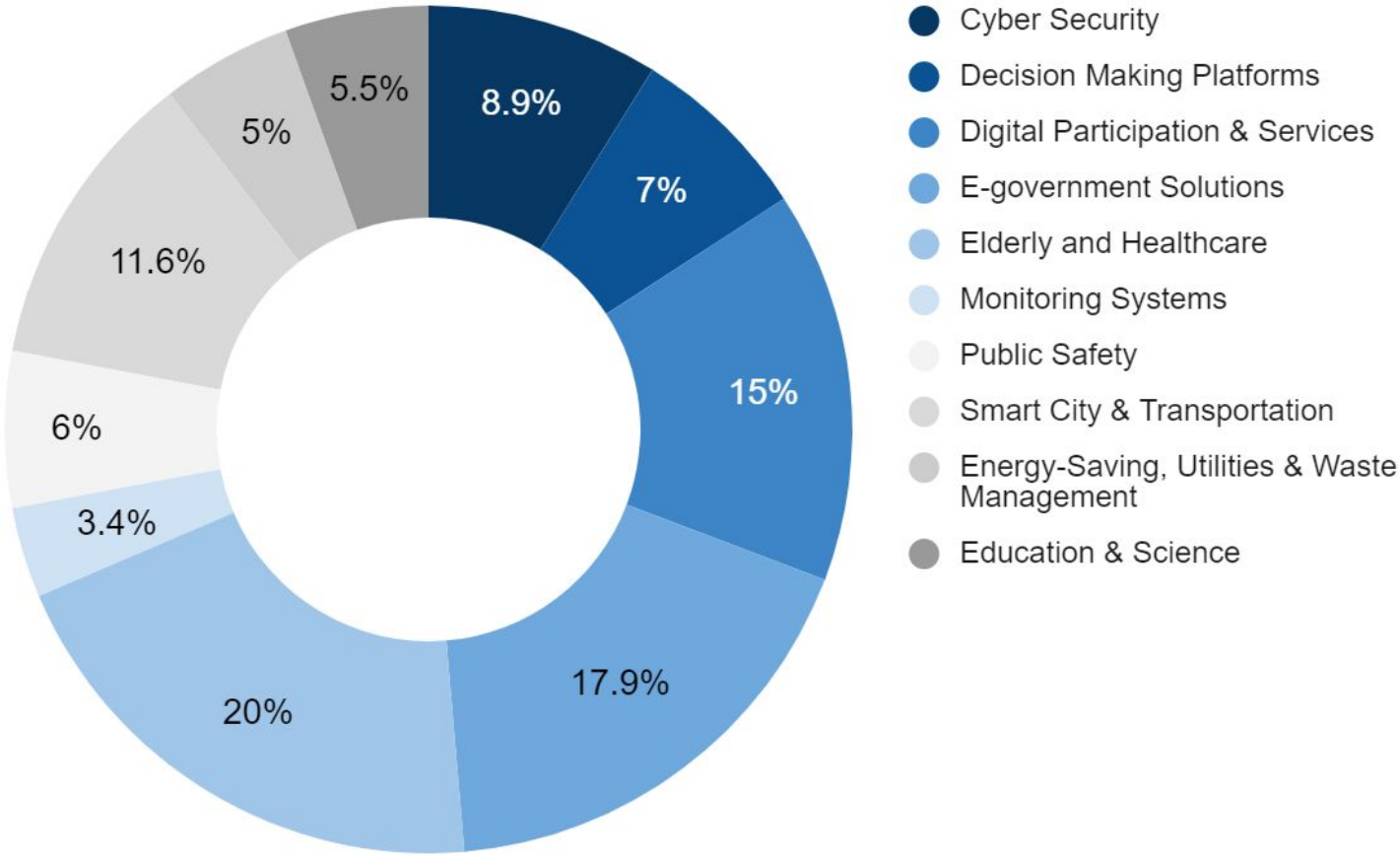
Share of GovTech Companies by Subsectors, Q2 2022



Elderly and Healthcare is the largest category comprising 20% of all analysed companies.

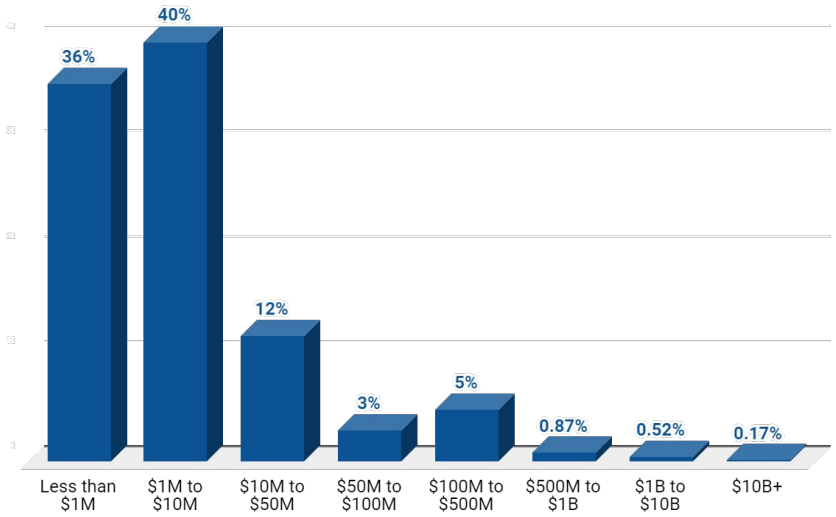
The second and the third biggest types are E-Government solutions and Digital Participation & Services with 17.9% and 15% respectively.

Comparing to Q1 2022, Education & Science category grew from 3.5 % to 5.5%, and Cyber Security from 5.4% to 8.9%

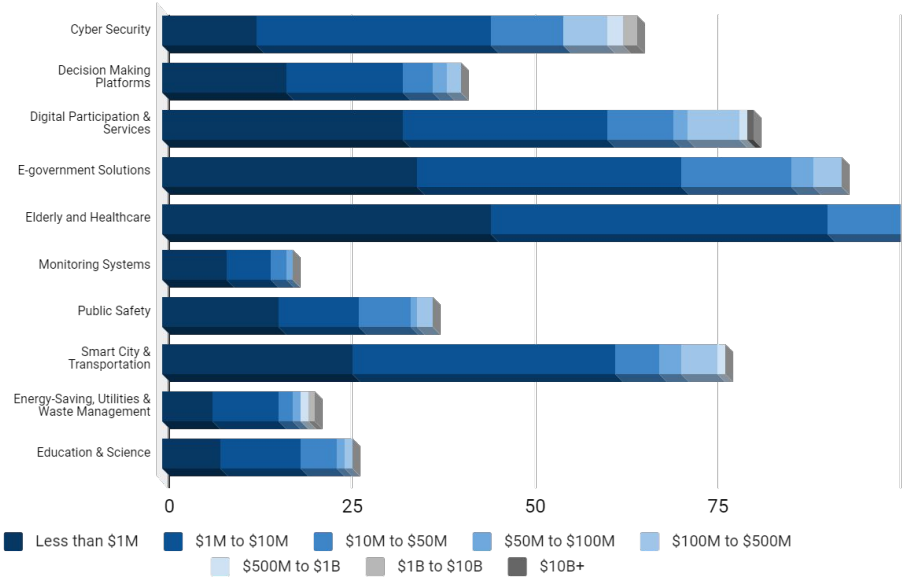

8.9%
7%
15%
17.9%
20%
3.4%
6%
11.6%
5%
5.5%
Cyber Security
Decision Making Platforms
Digital Participation & Services
E-government Solutions
Elderly and Healthcare
Monitoring Systems
Public Safety
Smart City & Transportation
Energy-Saving, Utilities & Waste Management
Education & Science

Revenue Breakdown by Subsectors

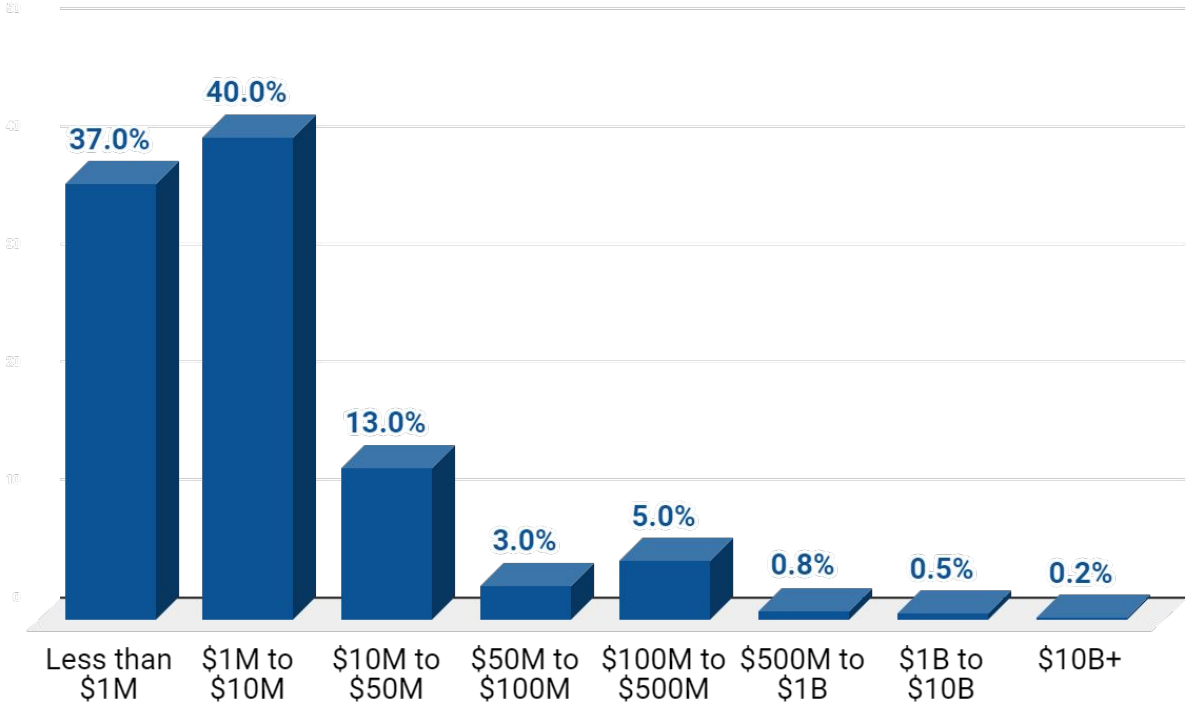
Breakdown of GovTech Companies by Estimated Revenue, Q2 2022

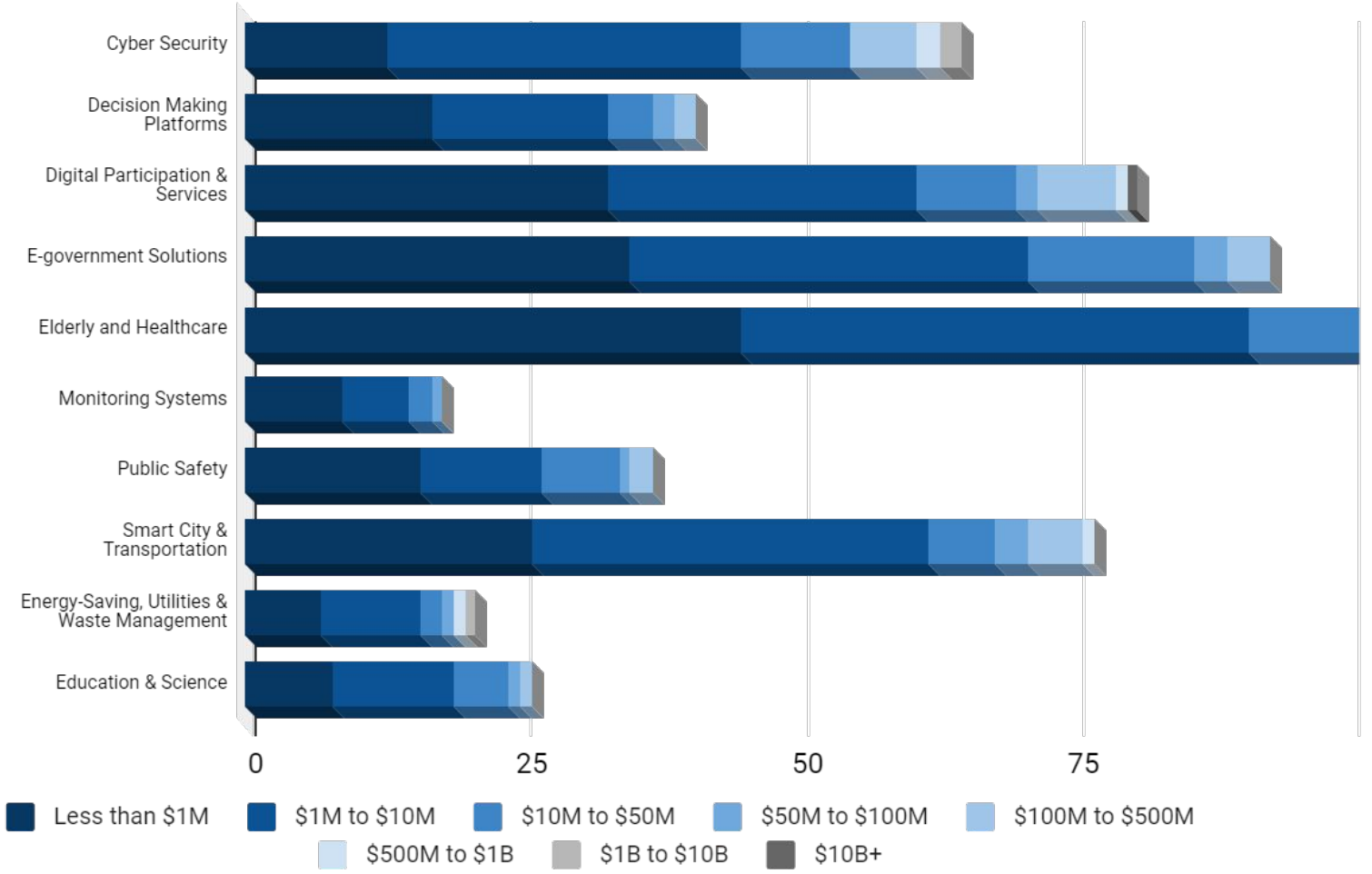


GovTech Subsectors by Estimated Revenue, Q2 2022



Early-stage startups, middle-market firms, and publicly traded firms all make up the GovTech industry, which is a varied and expanding industry. Nevertheless, less than $10 million in income is earned by each of the 76% of GovTech businesses every year.


40.0%
37.0%
13.0%
5.0%
3.0%
0.8%
0.5%
0.2%
Less than $1M
$1M to $10M
$10M to $50M
$50M to $100M
$100M to $500M
$500M to $1B
$1B to $10B
$10B+


Cyber Security
Decision Making Platforms
Digital Participation & Services
E-government Solutions
Elderly and Healthcare
Monitoring Systems
Public Safety
Smart City & Transportation
Energy-Saving, Utilities & Waste Management
Education & Science
0
25
50
75
Less than $1M
$1M to $10M
$10M to $50M
$50M to $100M
$100M to $500M
$500M to $1B
$1B to $10B
$10B+

Leading GovTech Companies in Terms of Investments (in USD* B)

1	SenseTime	2.64
2	Devoted Health	1.97
3	Booz Allen Hamilton	1.71
4	Welltower Inc	1.25
5	Blackberry	1
6	Miaoshou Doctor	0.95
7	Enerkem	0.87
8	Nextdoor	0.72
9	Fractal Analytics	0.69
10	Pioneer Corporation	0.54
11	One Medical	0.53
12	CarDekho	0.5
13	Biocartis	0.42
14	Signifyd	0.39
15	Verra Mobility	0.35
16	CivicPlus	0.29
17	Salt Security	0.27
18	FiscalNote	0.26
19	BigID	0.25
20	Axon	0.25

Leading GovTech Companies in Terms of Investments (in USD* B)

21	Papa	0.24
22	Udacity	0.24
23	PointClickCare	0.23
24	Mark43	0.23
25	Accela	0.22
26	Passport	0.21
27	Envision Digital	0.21
28	RapidSOS	0.21
29	Verint Systems	0.2
30	Alation	0.19

31	Qingteng Cloud Security	0.18
32	Intellifusion	0.17
33	Gradiant	0.17
34	Gtmhub	0.16
35	Optibus	0.16
36	INRIX	0.16
37	UISEE	0.15
38	Brainly	0.15
39	Miovision Technologies	0.14
40	Interos	0.13

Leading GovTech Companies in Terms of Investments (in USD* B)

41	Citizen	0.13
42	OpenGov	0.13
43	VertexOne	0.13
44	Canary	0.12
45	Shuttl	0.12
46	Mable	0.11
47	FINEOS	0.11
48	Actinium Pharmaceuticals	0.11
49	Vesta Healthcare	0.11
50	Glooko	0.1

51	Smartfrog & Canary	0.1
52	Osaro	0.1
53	Secsmart	0.09
54	Cera	0.09
55	Sealed	0.08
56	Bidgely	0.08
57	Micreos	0.08
58	Bolder Industries	0.08
59	Merit	0.08
60	Xigua City	0.07

Leading GovTech Companies in Terms of Investments (in USD* B)

61	Carbyne	0.07
62	iProov	0.07
63	Benevity	0.07
64	True Link Financial	0.07
65	ShotSpotter	0.07
66	Aclima	0.06
67	EverC	0.06
68	Safely You	0.06
69	Whisper	0.06
70	Citymapper	0.06

71	Cybersixgill	0.06
72	ADASKY	0.06
73	Socrata	0.05
74	Birdie	0.05
75	Medisafe	0.05
76	Zencity	0.05
77	Ethena	0.05
78	Safe Security	0.05
79	Aunt Bertha	0.05
80	AGIS Networks	0.05

Leading GovTech Companies in Terms of Investments (in USD* B)

81	Zeni	0.05
82	BaseBit Technologies	0.05
83	Sounding Board	0.04
84	StreetLight Data	0.04
85	Empathy	0.04
86	Harmony Information Systems	0.04
87	Ripjar	0.04
88	Hummingbird	0.04
89	MINIEYE	0.04
90	Skydweller	0.04
91	Callsign	0.04
92	Homecare.com	0.04
93	Horizon3.ai	0.04
94	WiderCircle	0.04
95	AristaMD	0.04
96	door2door	0.04
97	Opendatasoft	0.04
98	Farewill	0.04
99	EngagePoint	0.04
100	Zillion Group	0.03

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GovTech Investment Overview

Investment Landscape

of investors are in North America region

of investors are US-based

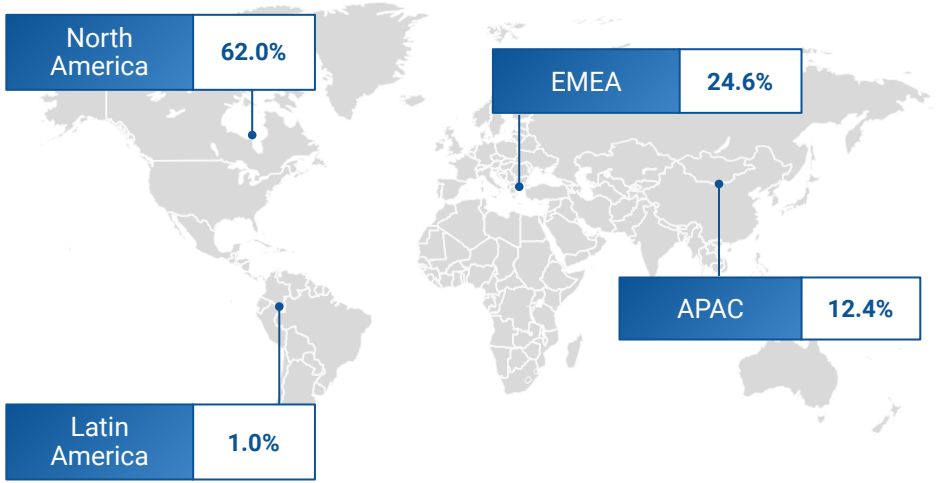
Total reported funding

Largest Series A GovTech deal

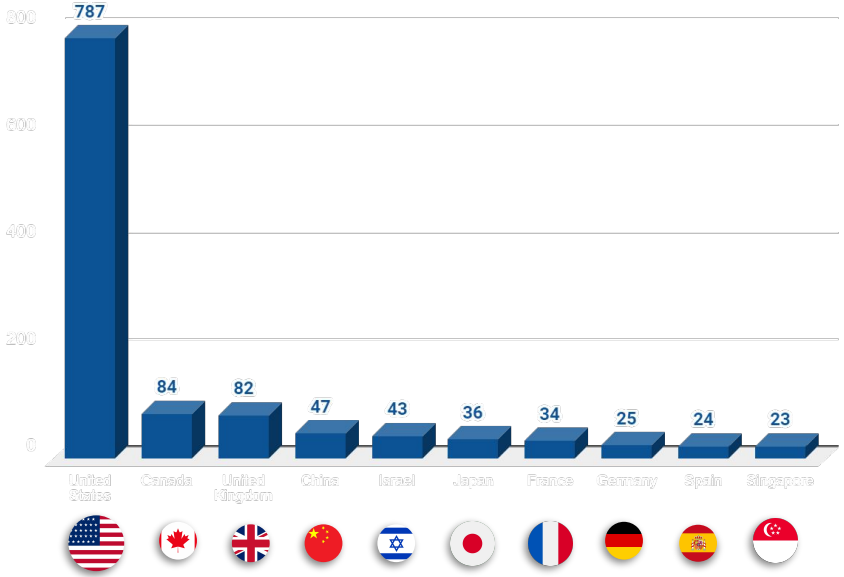
With help from two COVID-accelerated markets, the government technology sector has grown exponentially in recent years. As businesses are now required to serve this fast expanding market because of its drastically enhanced adoption curve, this presents an opportunity for innovation and investment.

Regional Distribution of GovTech Investors

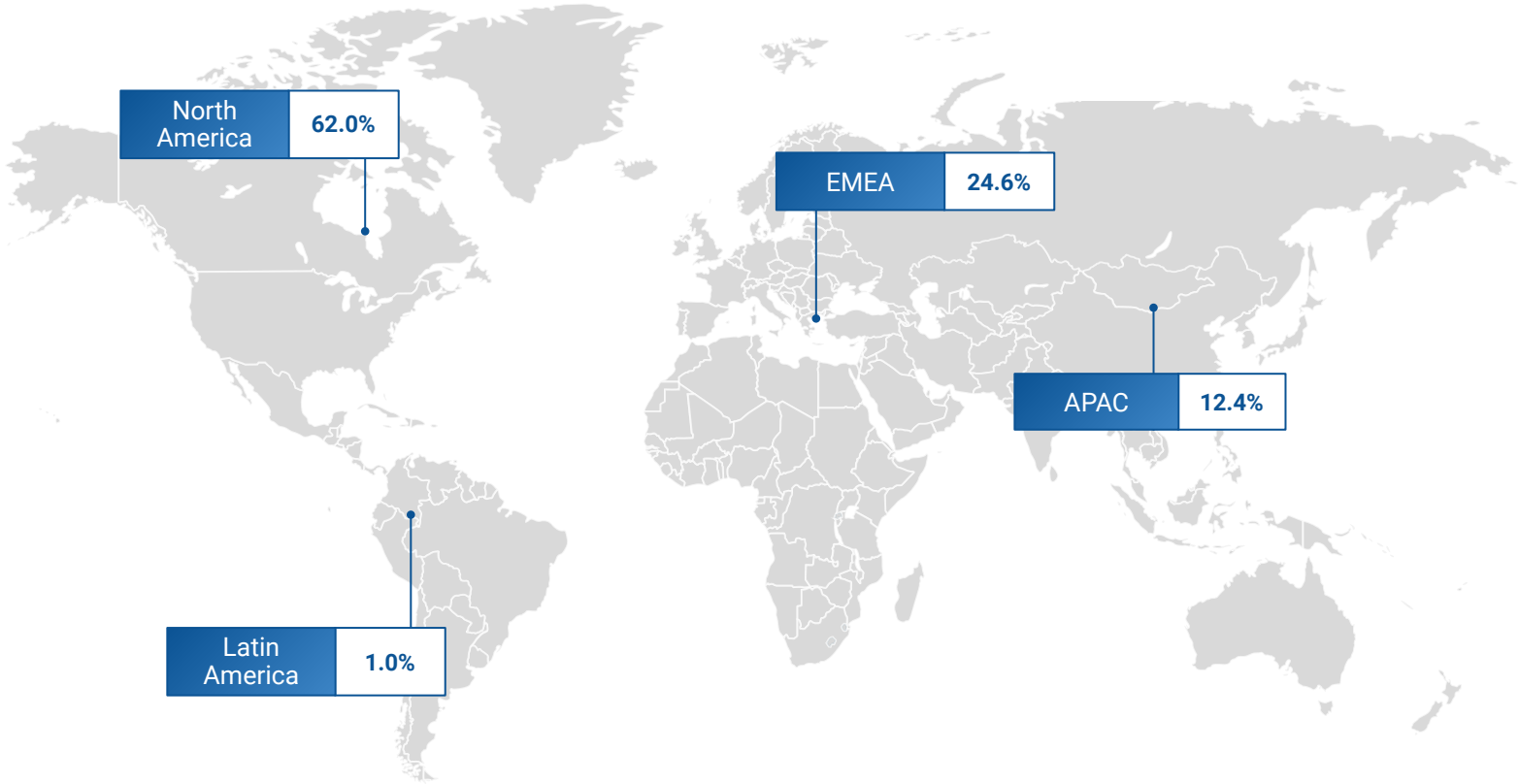
GovTech Investors by Regions

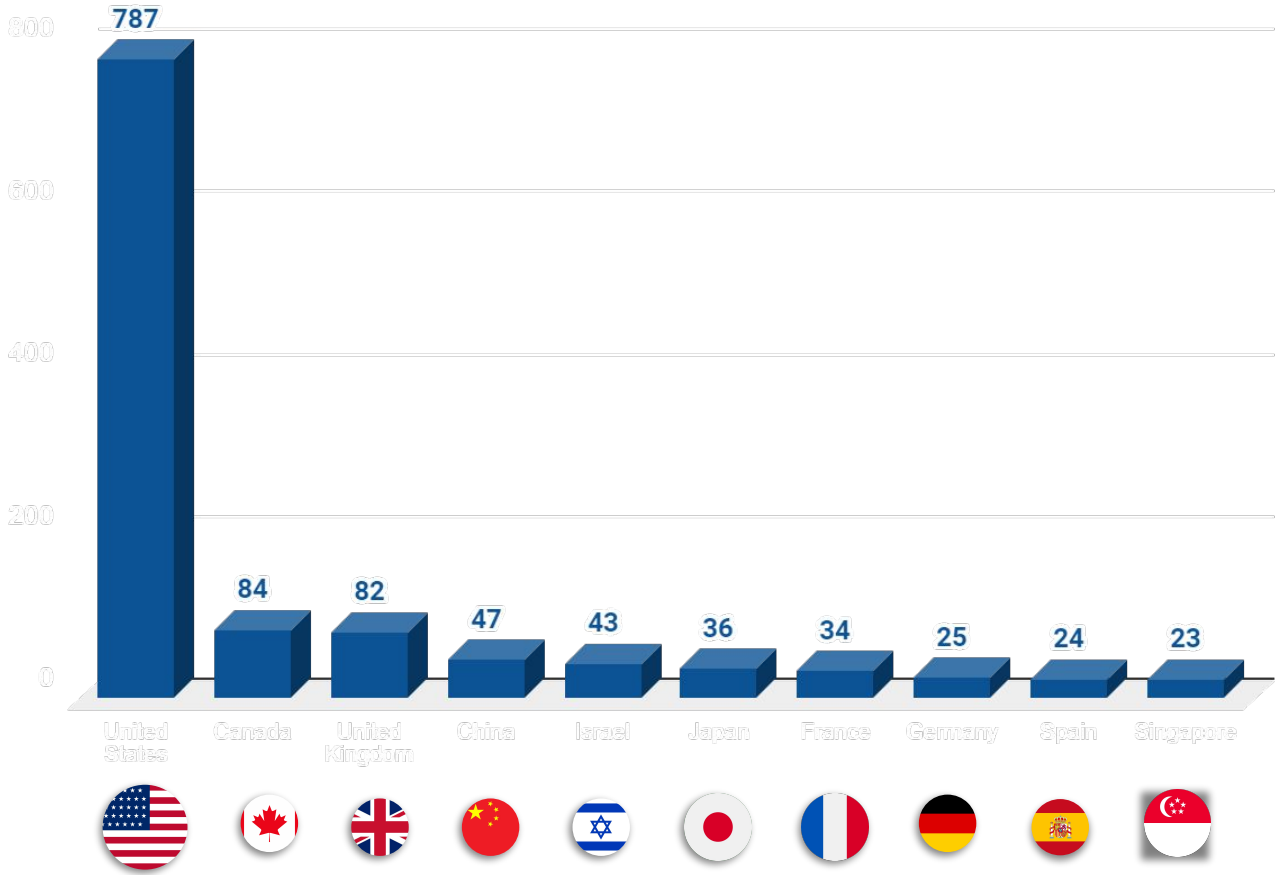


Top 10 Countries by the Number of GovTech Investors, Q2 2022



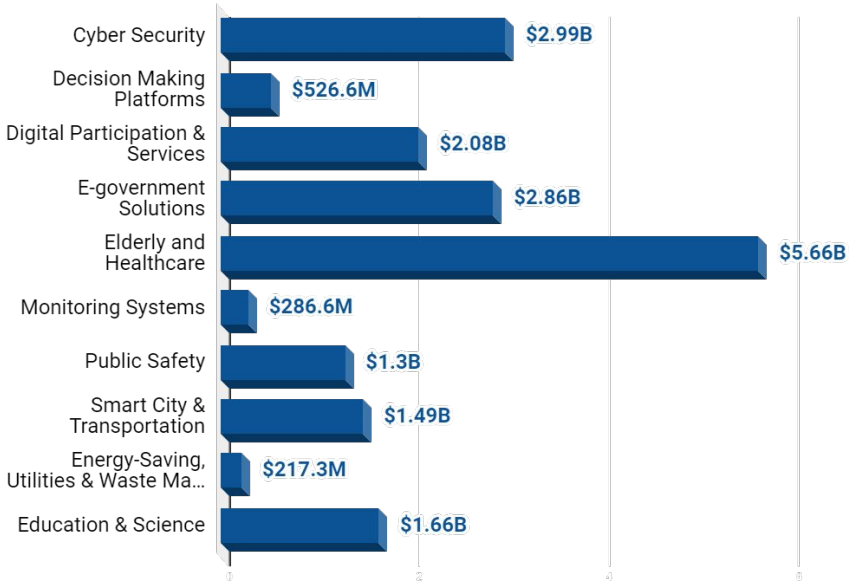
Most investors interested in GovTech companies are based in North America, especially in the United States (55.9% of all analysed investors). The second region is investors in EMEA (24.6%), followed by APAC (12.4%).


North America
62.0%
EMEA
24.6%
APAC
12.4%
Latin America
1.0%

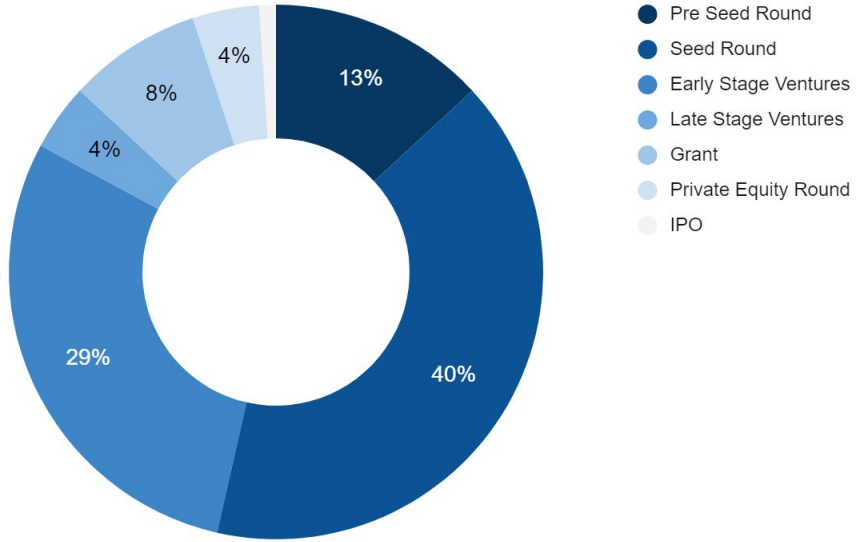

800
600
400
200
0
787
84
82
47
43
36
34
25
24
23
United States
Canada
United Kingdom
China
Israel
Japan
France
Germany
Spain
Singapore

Financing Across GovTech Subsectors

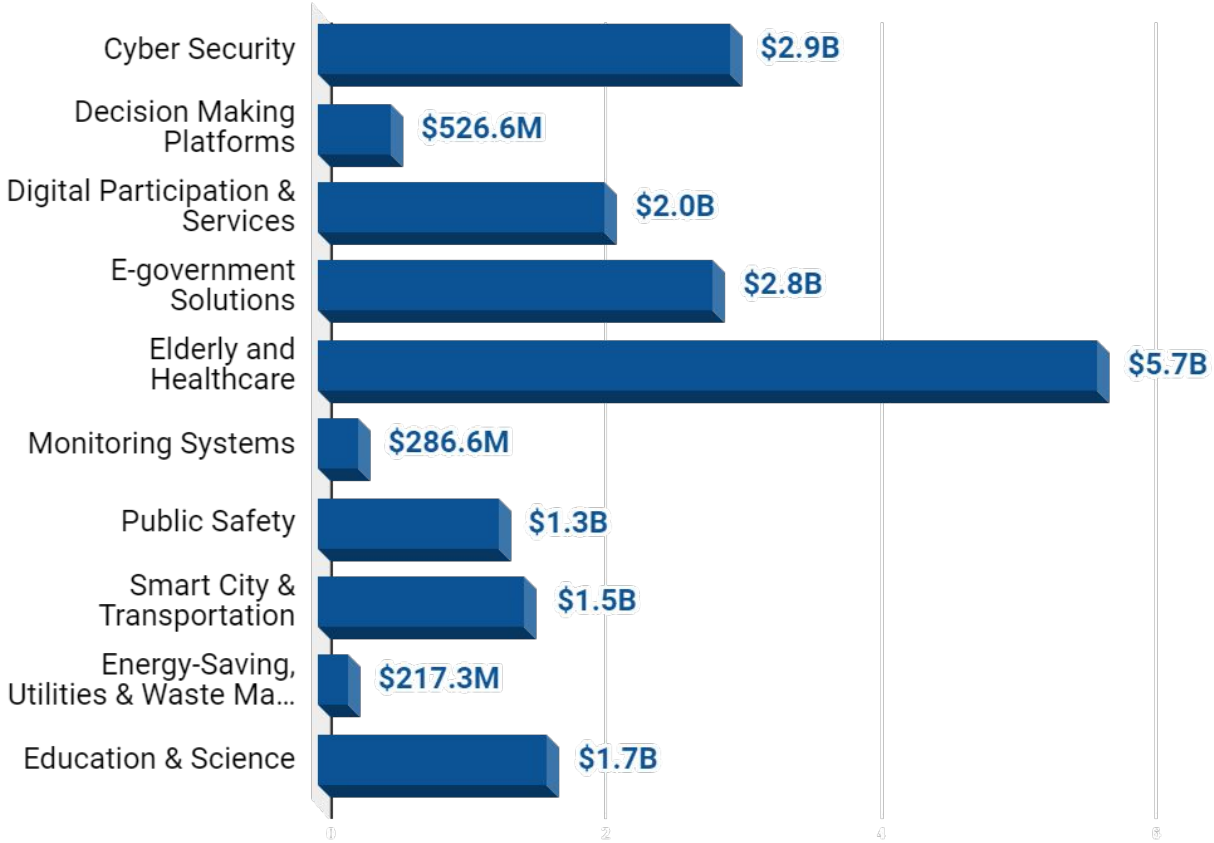
Total Funding Amount by Subsector, Q2 2022



Funding Status of GovTech Companies



The most popular rounds for tech startups in GovTech companies are Pre Seed, Seed, Series A and B. Elderly and Healthcare companies raised more than $5.66B, followed by Cyber Security companies with fundings exceeding $2.9 billion.

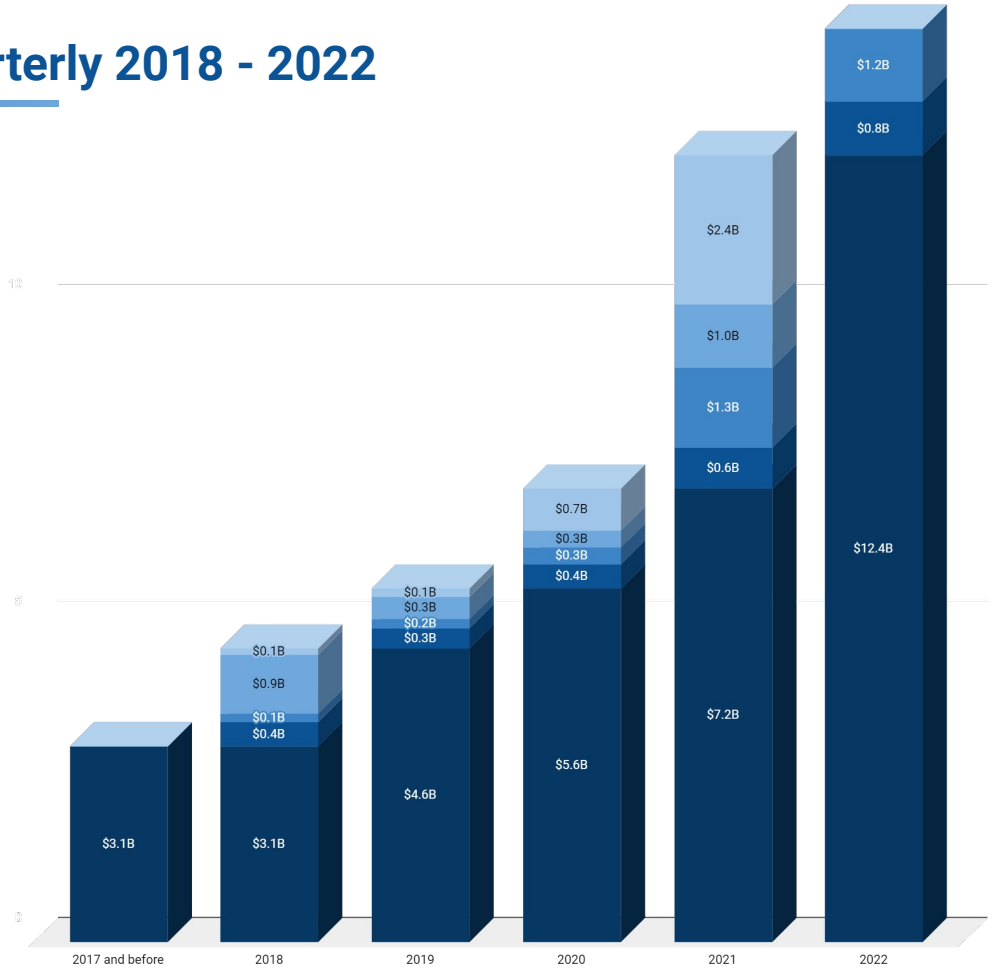

Cyber Security
$2.9B
Decision Making Platforms
$526.6M
Digital Participation & Services
$2.0B
E-government Solutions
$2.8B
Elderly and Healthcare
$5.7B
Monitoring Systems
$286.6M
Public Safety
$1.3B
Smart City & Transportation
$1.5B
Energy-Saving, Utilities & Waste Ma...
$217.3M
Education & Science
$1.7B
0
2
4
6

Investment Deals in GovTech Quarterly 2018 - 2022

Across the studied GovTech companies and their investors, the team of Deep Knowledge Analytics has calculated GovTech quarterly investments since 2018.

These investments demonstrate a rapidly expanding interest in the field of GovTech among business people, government agencies, non-profit societies, universities, and private organisations. The highest investment growth spurts in the industry occurred in the period of 2017-2018 (49.8%) and 2020-2021 (73.4%).Currently, at the end of Q2 2022, investment growth compared to the end of 2021 is 16.2%.

The average increase in capitalization in the GovTech industry over the last 5 years is 43% which clearly shows a trend in implementing more and more advanced technologies in government processes.



Top 10 Investment Deals in GovTech till Q2 2022

Selected of the major deals included:

Devoted Health — **$1.15 billion** of investments Devoted Health received in Series D funding round from General Catalyst. Devoted Health is a healthcare company serving seniors and giving them a health care plan with personal guides and world-class technology.

SenseTime — **$1 billion**, received during Series D investment round, provided from SoftBank Vision Fund. SenseTime is a leading AI software company focused on creating a better AI-empowered future through innovation.

Blackberry — **$1 billion**, as a result of Post-IPO Equity money received from Fairfax Financial Holdings. BlackBerry provides wireless devices and solutions for the worldwide mobile communications market.

SenseTime — **$620 million**, previously raised by the company from Singtel Innov8 as a Series C investment fundings.

Pioneer Corporation — **$540 million**, as a result of acquired Debt Financing from Baring Private Equity Asia. Pioneer Corporation is a leading global manufacturer of electronic products for the govtech, consumer, and professional markets.

Top 10 Investment Deals in GovTech till Q2 2022

Selected of the major deals included:

Fractal Analytics — **$360 million** acquired in Private Equity Round from TPG Capital Asia. Company aims to reshape business through science and advanced data tools, so human intelligence can be freed from the drudgery of monotonous work.

CivicPlus — **$290 million** received from Insight Partners in Private Equity Round. CivicPlus is a software platform that offers government website design solutions.

Nextdoor — **$270 million** of investments raised from ARK Investment Management as a Post-IPO Equity funding round. Nextdoor is where communities come together to greet newcomers, exchange recommendations, and read the latest local news.

Miaoshou Doctor — **$232 million** received from QC Capital as a Series F. Miaoshou Doctor is a health care platform that provides communication services between doctors and patients.

One Medial — **$220 million** granted from The Carlyle Group as a Private Equity Round. One Medical is a members-only technology platform offering an array of concierge medical services, now aquired by Amazon.

Leading GovTech Investors by Number of Exits

1	New Enterprise Associates	556
2	Intel Capital	473
3	Y Combinator	444
4	SV Angel	410
5	Techstars	372
6	Accel	354
7	Sequoia Capital	350
8	500 Startups	339
9	Goldman Sachs	321
10	Kleiner Perkins	318
11	Bessemer Venture Partners	284
12	Venrock	267
13	Index Ventures	227
14	GV	225
15	Lightspeed Venture Partners	207
16	Battery Ventures	197
17	Andreessen Horowitz	190
18	First Round Capital	189
19	EASME - EU Executive Agency for SMEs	186
20	Insight Partners	184

Leading GovTech Investors by Number of Exits

21	Right Side Capital Management	177
22	General Catalyst	174
23	TA Associates	170
24	Menlo Ventures	168
25	National Science Foundation	167
26	MassChallenge	162
27	Redpoint	160
28	CRV	153
29	Felicis Ventures	152
30	Canaan Partners	149
31	Lerer Hippeau	145
32	Trinity Ventures	142
33	Khosla Ventures	141
34	Plug and Play	140
35	HarbourVest Partners	140
36	General Atlantic	138
37	Warburg Pincus	135
38	Founders Fund	134
39	Hercules Capital	131
40	Tiger Global Management	131

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GovTech Hubs Overview

Leading GovTech Hubs

1	Access Cities
2	Amsterdam Smart City
3	ASTRI
4	Bee Smart City
5	Beijing City Lab
6	Berlin Innovation Agency
7	Berlin TXL
8	Bpifrance
9	BrazilLAB
10	BRIC
11	Catapult Connected Places
12	CITIES
13	CITIXL
14	City of Boston
15	CivTech Scotland
16	CorLab
17	Creative HQ
18	e-Estonia
19	Euro Cities
20	GovTech Catalyst

Leading GovTech Hubs

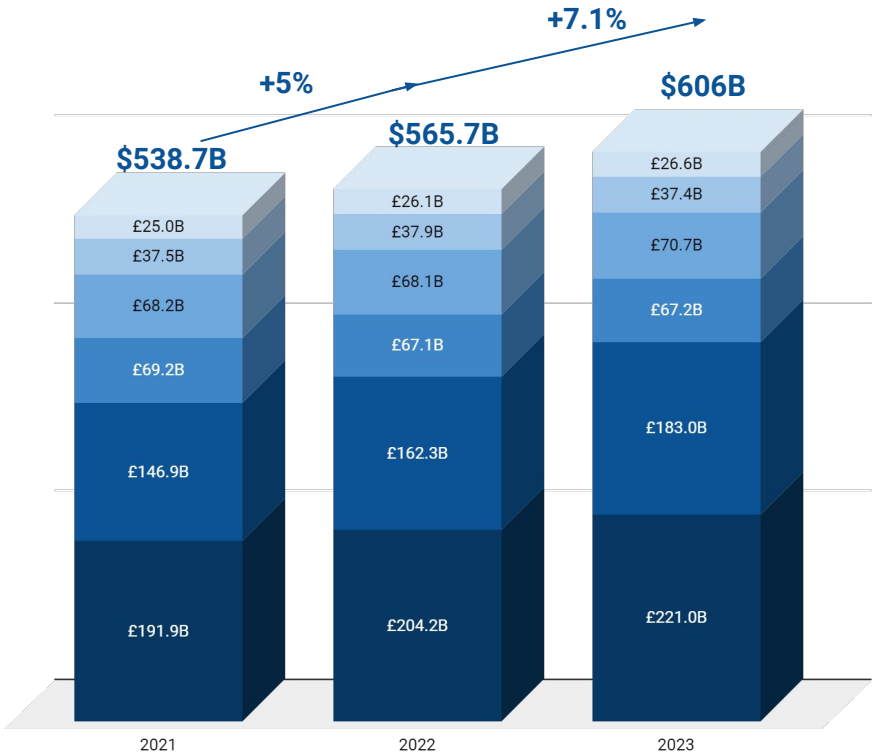
21	GovTech Incentive Program
22	GovTech Lab
23	GovTech Lab Luxembourg
24	GovTech Polska
25	GovTech Singapore
26	GovTech-program Denmark
27	Greater Copenhagen
28	IDB Lab
29	IRIS smartCities
30	Kyiv Smart City
31	Munroe K
32	Nordic Smart City Network
33	Public
34	Public Tech Lab
35	Science City Lyngby
36	Smart Cities Klub
37	Smart City Bangladesh
38	Smart City Berlin
39	Smart City Hub
40	Smart City Insights

Leading GovTech Companies in Terms of Investments (in USD* B)

41	Smart City Wien
42	Smart Nation Singapore
43	SmartCity Hub
44	The Beacon
45	The Rain Clouds
46	URBACT
47	Urban Hub
48	Urban Institute
49	Urban Tech Hub
50	Urbantech NYC

Global Government IT Spending

Government IT Spending Forecast by Segment Worldwide

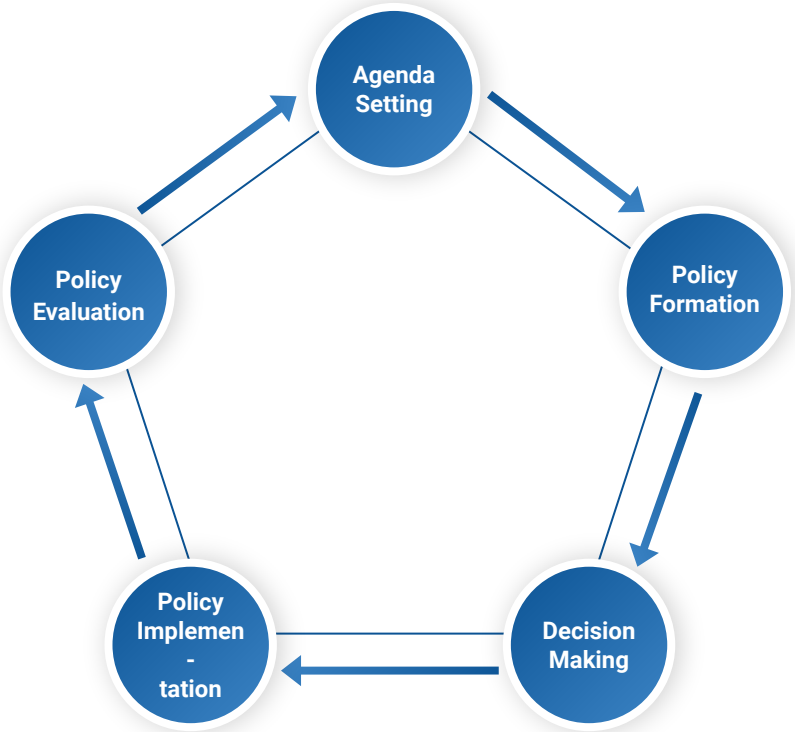


- Software is anticipated to experience the strongest growth across all segments in 2022, continuing the trend from 2021.
- The expansion of data center systems will also continue to decline during the projected period as legacy modernization remains a top priority in government organizations.
- Government organizations will keep making investments in vital applications that directly support end-user interfaces, resulting in robust growth.
- In contrast, the forecast say that investment in telecom services would fall by 4.1% in 2022 as spending is cut on pricey legacy systems in favor of digital service delivery models.

Sources: (1) Gartner

Policy Making Process: Where is GovTech?

The process of formulating public policy plays a central role in the life of the population. The government's primary goal is for legislators to set guidelines and then government officials to enforce those policies. They affect the life of every citizen, from how and when to vote, to where everyone can park, and what is a crime and what is not.



Public Policy Process Cycle

GovTech companies participate in the policy implementation and evaluation phases and help governments implement their chosen public policy option. GovTech companies are the **link between the government and the immediate population** of a particular country. Such companies are the executive body when governments pass laws (in our case, concerning longevity).
Stakeholders inside and outside the government **monitor the impact of a policy** and determine whether it achieves its intended goal. This can lead to further changes in public policy, taking into account the influence of the original policy.

Sources: Point Park University

Healthy Longevity Progressiveness

Longevity progressiveness is essential for driving economic progress and competitiveness — both for developed and developing economies.

Healthy Longevity is affected by many groups of factors such as **socioeconomic status, demography, income,** wellbeing, the quality of the health system and the ability of people to access it, health behaviours such as tobacco and excessive alcohol consumption, poor nutrition and lack of exercise, **social factors,** genetic factors and **environmental factors** including overcrowded housing, lack clean drinking water and adequate sanitation.

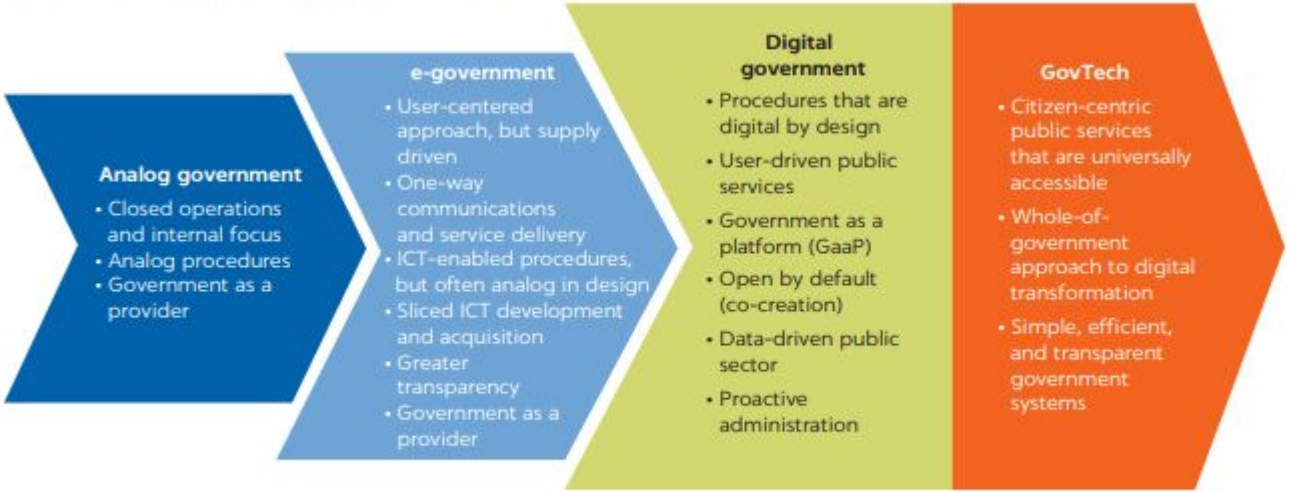
Longevity progressiveness should be based **on four pillars.** They are good health outcomes, cost-efficiency, affordability of healthcare treatment for the population and most complete access to services and products.

Sources: Aging Analytics Agency


Public Service Delivery`
Core Government Systems
Focus Areas
Citizen Engagement
GovTech Enablers

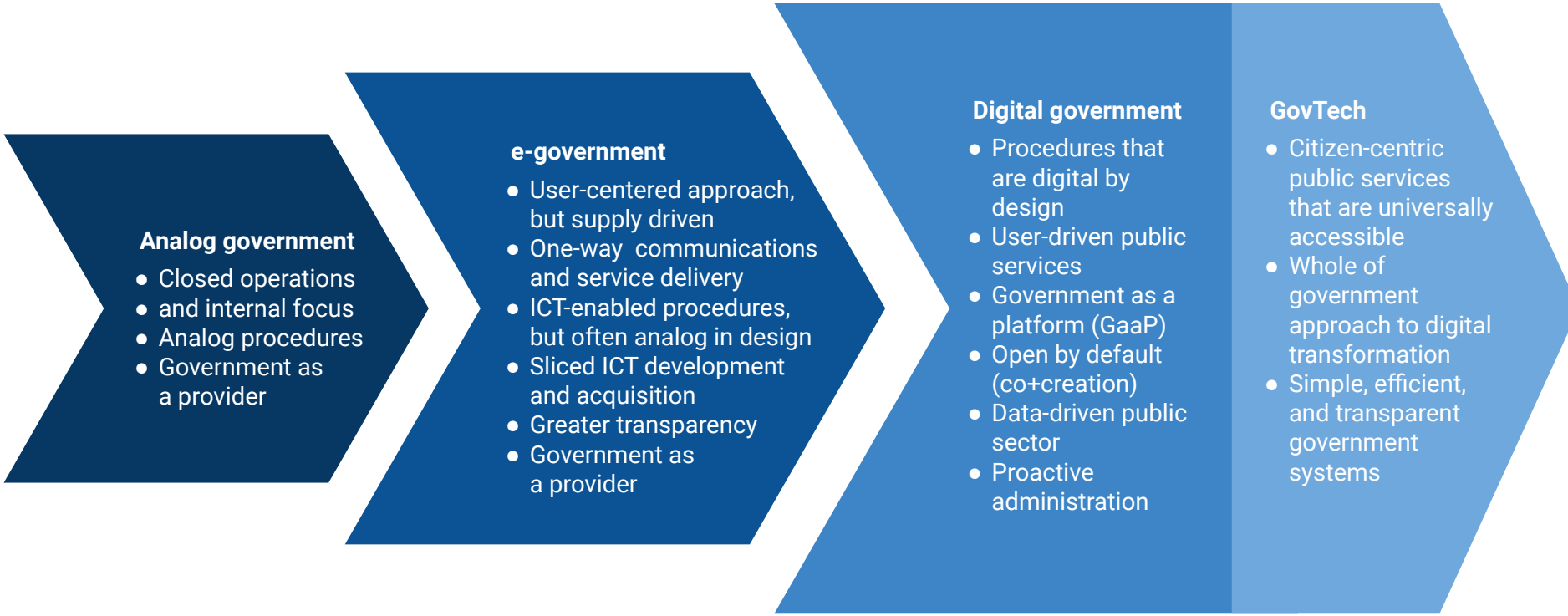
FIGURE 1.1

Digital transformation of the public sector

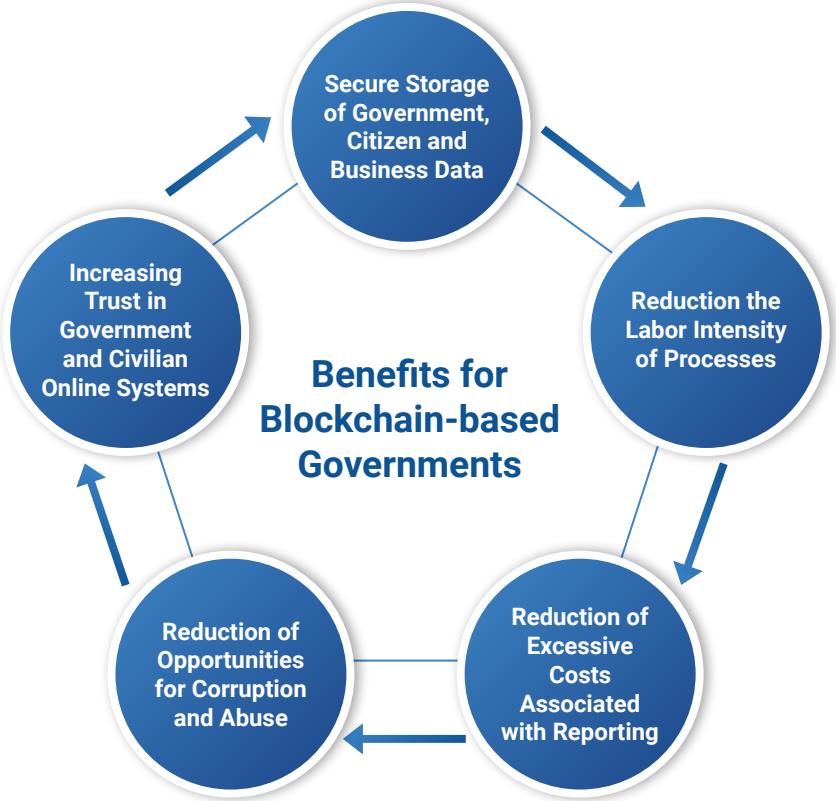


Source: World Bank, based on OECD 2019.
Note: ICT = information and communication technology. The term *sliced ICT development and acquisition* is the purchase and deployment of fragmented and disconnected ICT solutions with no or little focus on interoperability.

Sources: Aging Analytics Agency


Analog government
Closed operations
and internal focus
Analog procedures
Government as
a provider
e-government
User-centered approach,
but supply driven
One-way communications
and service delivery
ICT-enabled procedures,
but often analog in design
Sliced ICT development
and acquisition
Greater transparency
Government as
a provider
Digital government
Procedures that
are digital by
design
User-driven public
services
Government as a
platform (GaaP)
Open by default
(co+creation)
Data-driven public
sector
Proactive
administration
GovTech
Citizen-centric
public services
that are universally
accessible
Whole of
government
approach to digital
transformation
Simple, efficient,
and transparent
government
systems

GovTech and Blockchain



GovTech and Artificial Intelligence

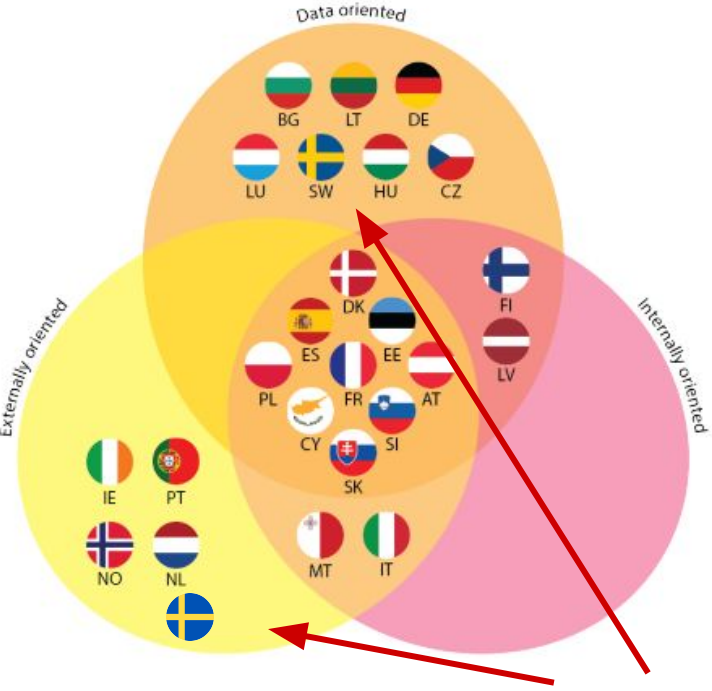
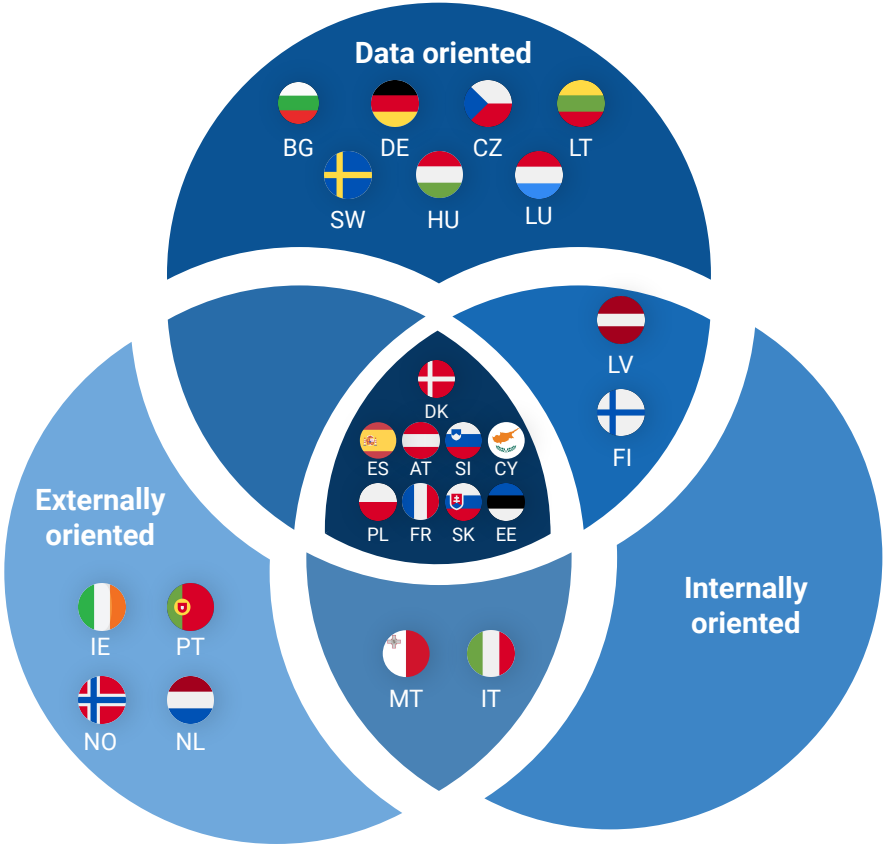
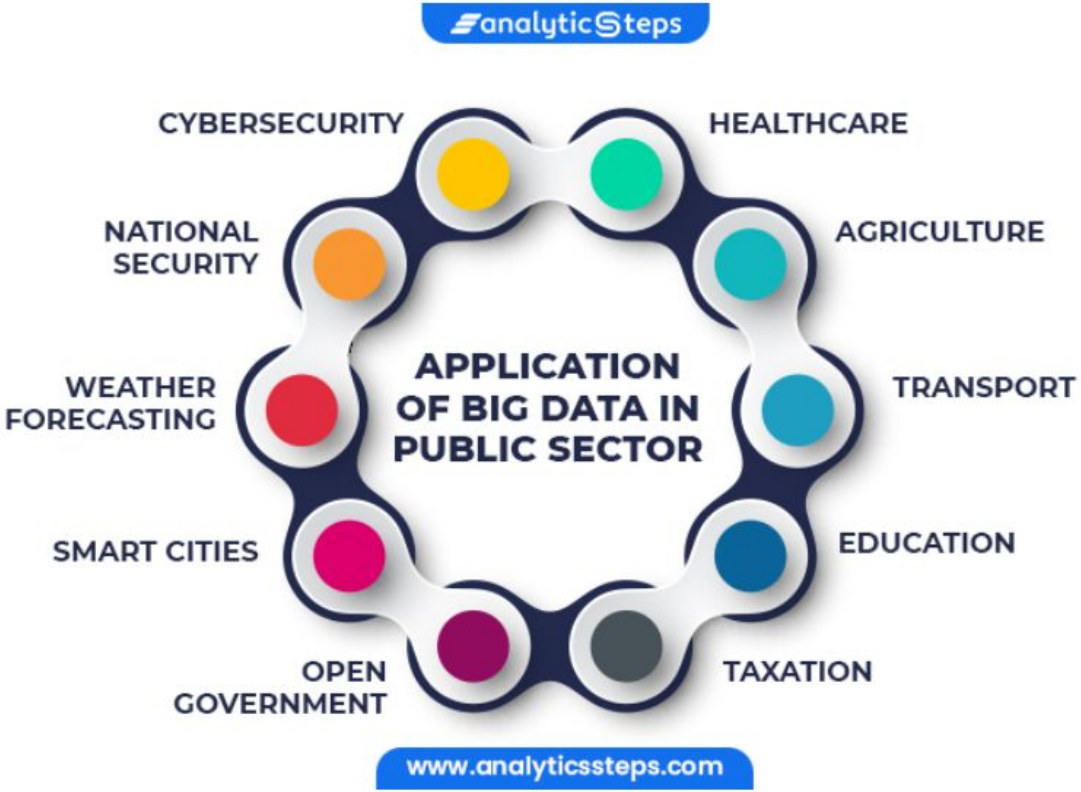


Figure 2.

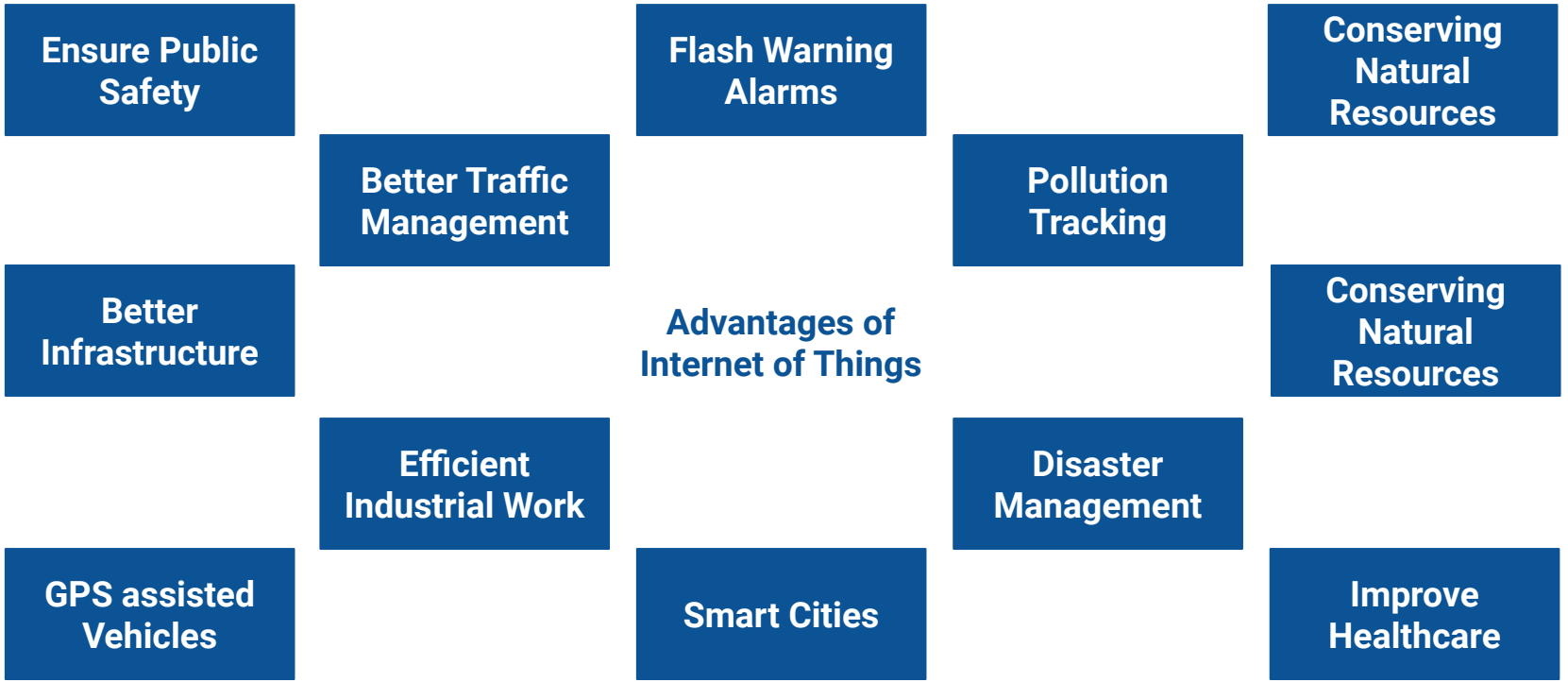
Это 2 раза повторяется флаг Швеции?

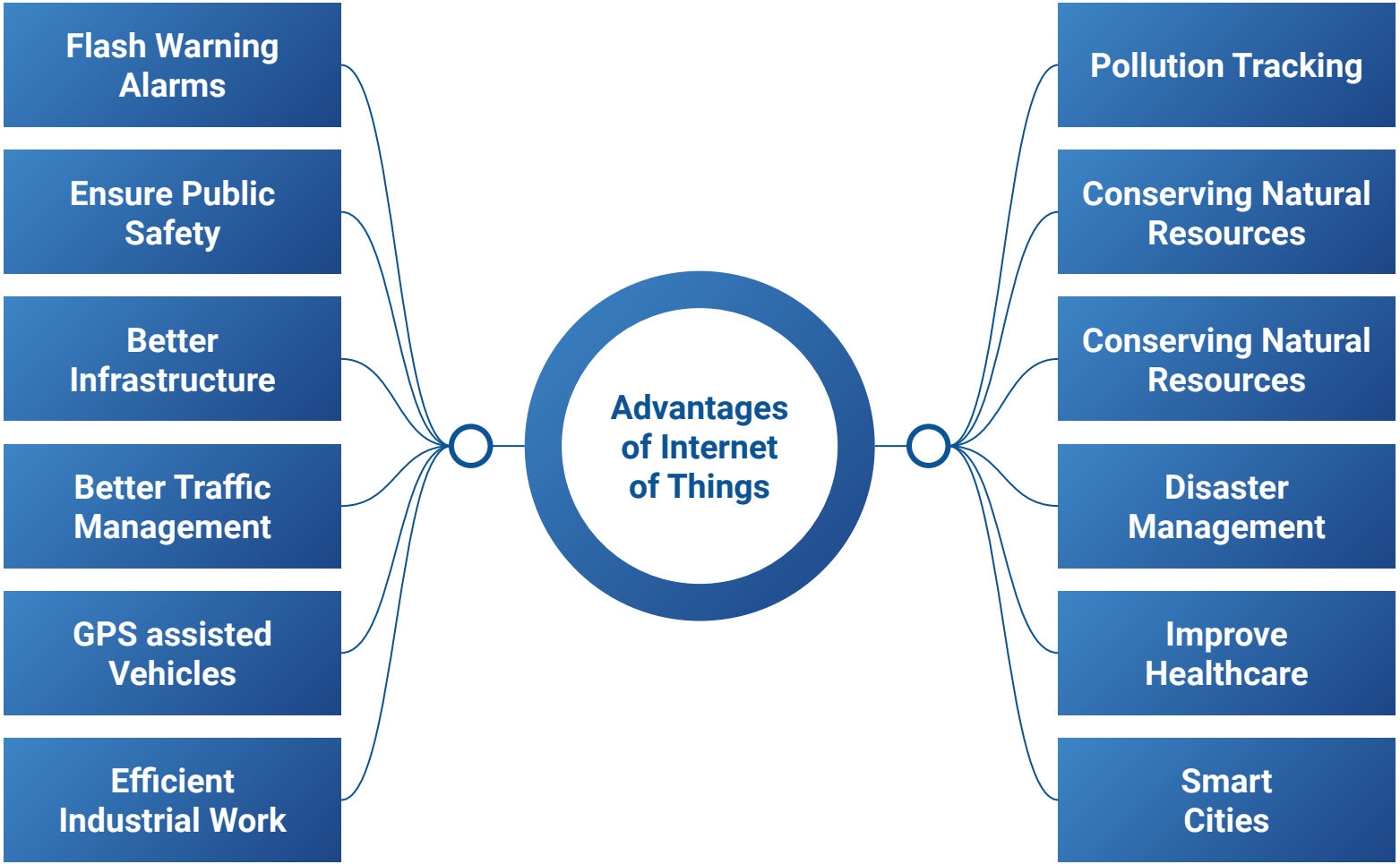


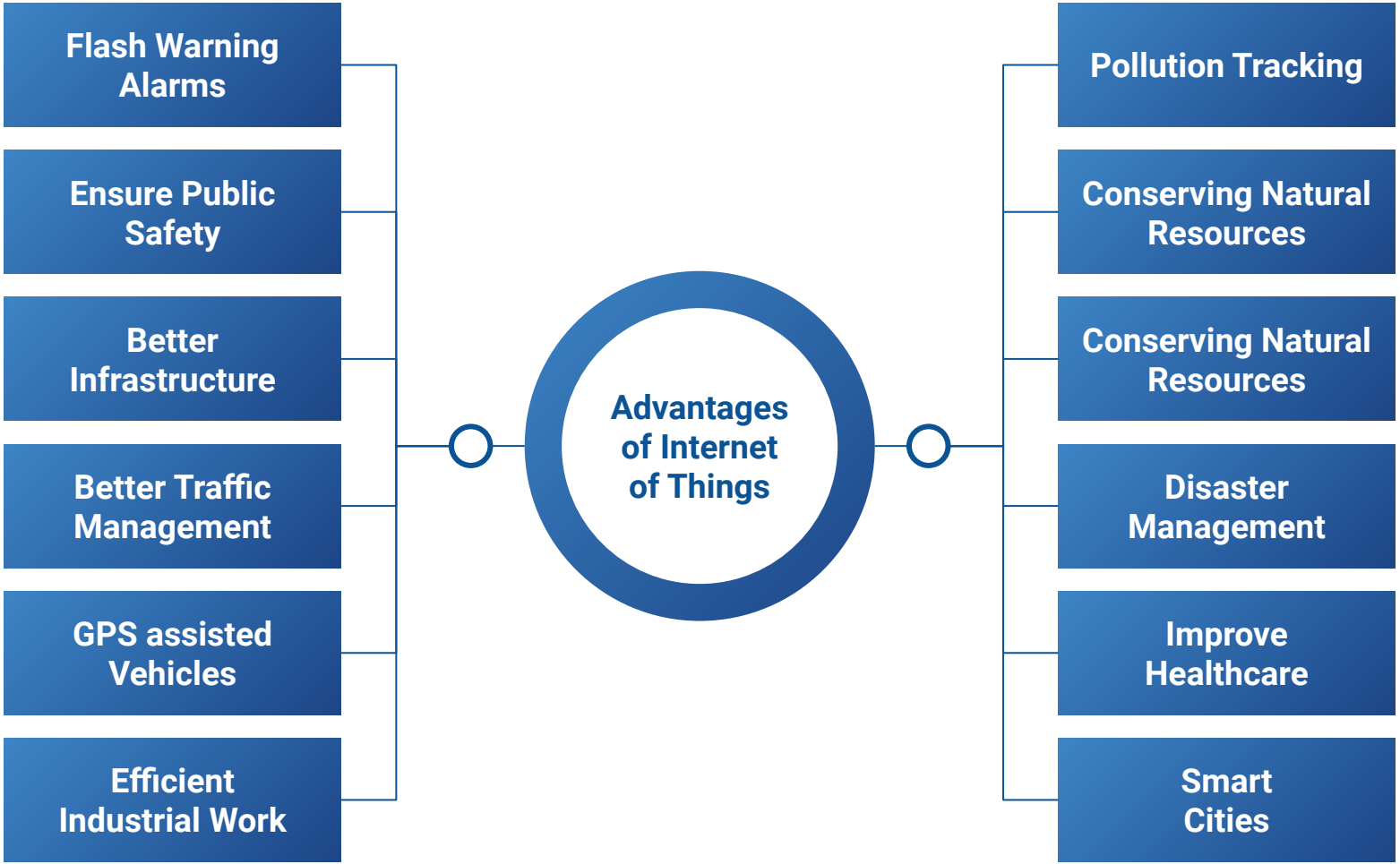
GovTech and Big Data



GovTech and IoT




Advantages of Internet of Things
Flash Warning Alarms
Ensure Public Safety
Better Infrastructure
Better Traffic Management
GPS assisted Vehicles
Efficient Industrial Work
Pollution Tracking
Conserving Natural Resources
Conserving Natural Resources
Disaster Management
Improve Healthcare
Smart Cities


Flash Warning Alarms
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Disaster Management
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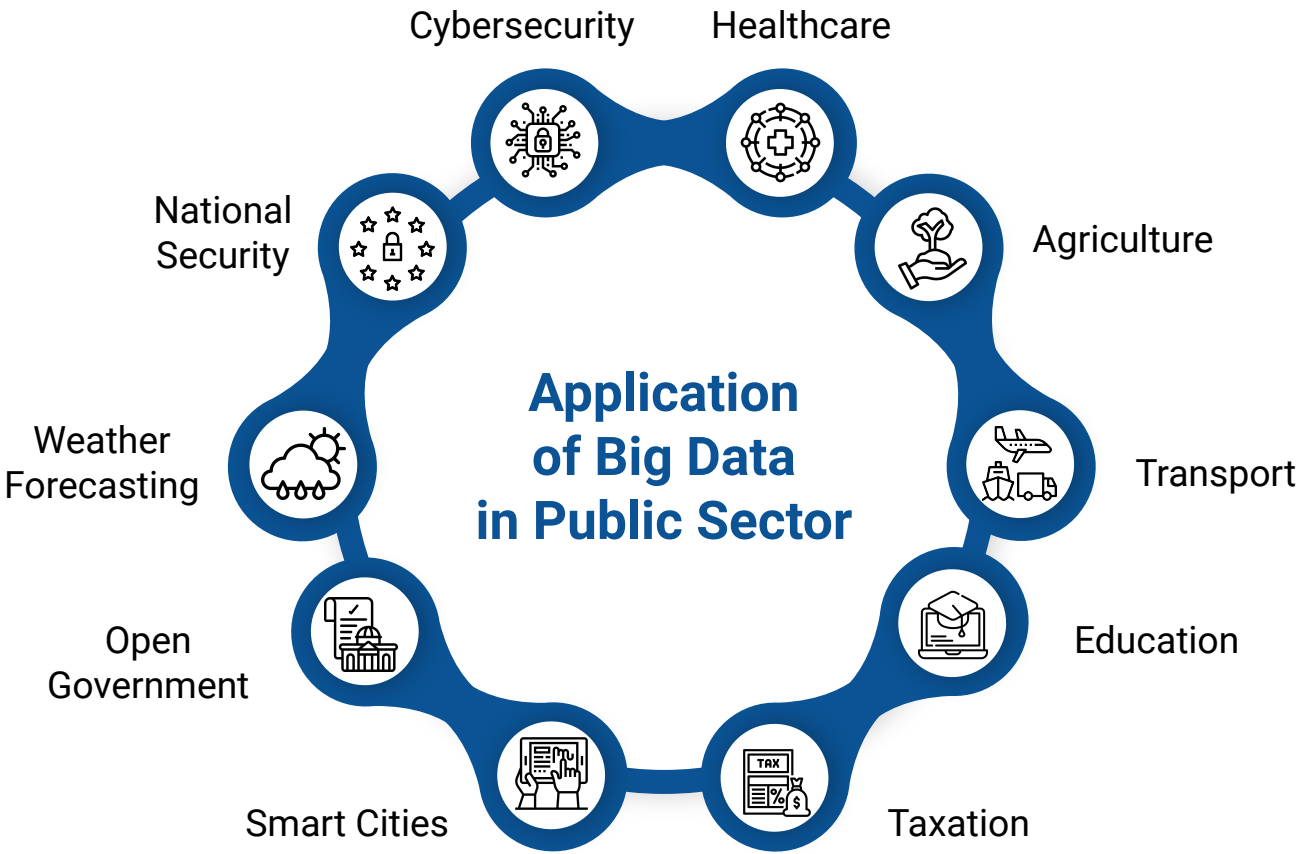
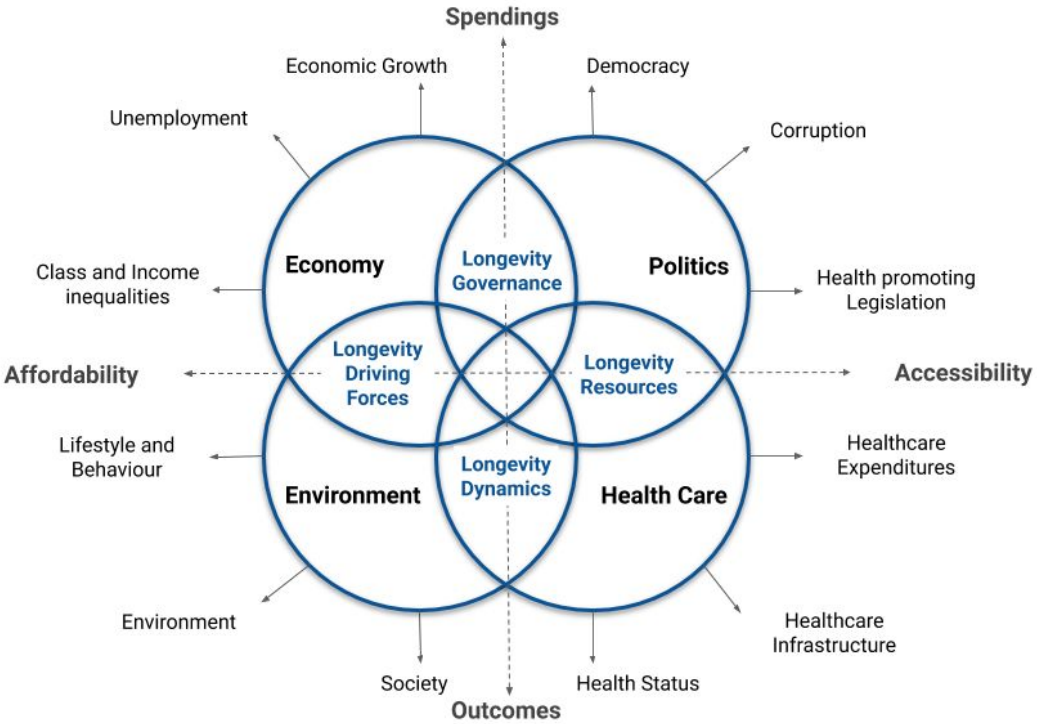
Smart Cities

GovTech and IoT

Challenges of IoT in Public Sector		
IoT networks can mitigate different forms of cybercrime	Personal security risks and the possibility of data leakage	Operational changes management
Insufficient input from the local community	High cost of equipment and infrastructure	Network lag


Cybersecurity
Healthcare
National Security
Agriculture
Application of Big Data in Public Sector
Weather Forecasting
Transport
Open Government
Education
Smart Cities
TAX
Taxation

Longevity Governance

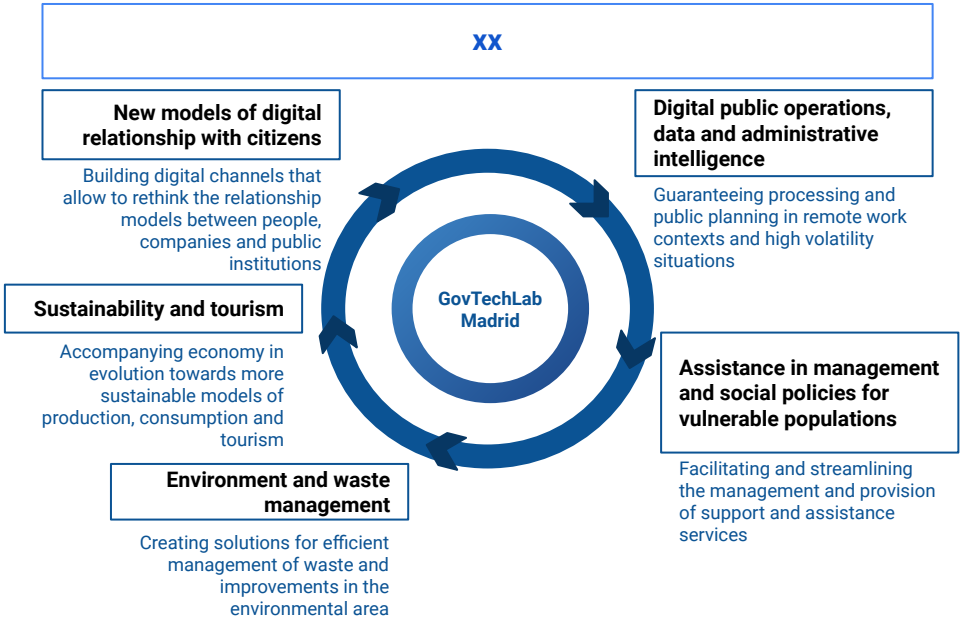


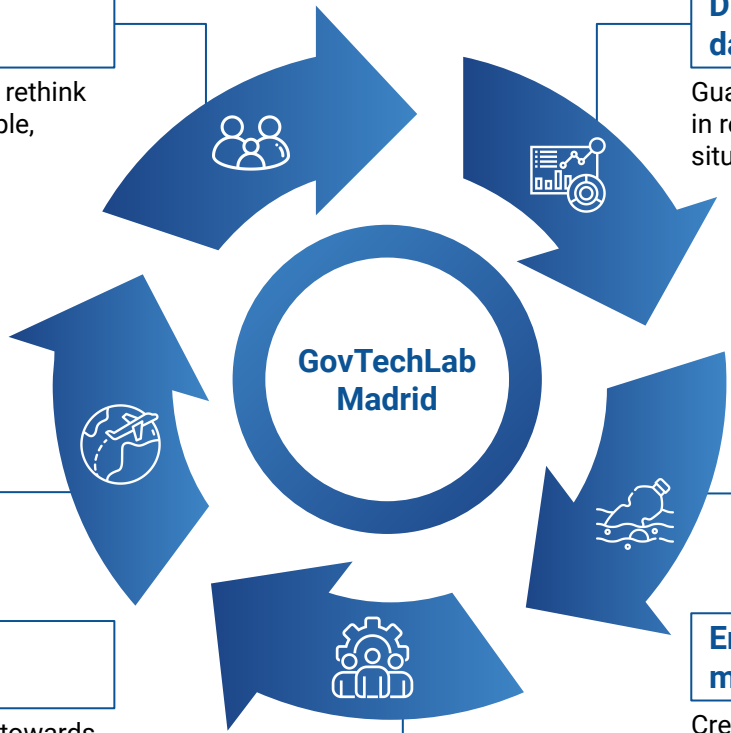
Longevity Governance

GovTech Case Studies: Spain

	AIM	MECHANISM	RESULT
TRAINING AND STUDY TOURS	Partnerships between non-traditional innovators, local governments, public organizations	Tailored programs for authorities and civil representatives that encourage transformation and innovation methods in public institutions	Specified parameters and pinpoint areas with the most potential for the govtech program to support your innovation strategy.
GOVTECH INNOVATION PROGRAMS	Collaborations with communities and regional public institutions to test and develop new digital solutions	Key resources for fostering govtech ecosystems in your region and customized top techniques innovation for success in public sector settings	Bringing companies and governments together to improve organizational, cultural, financial and technological areas of administration
KNOWLEDGE AND NETWORK GENERATION	Creating a network of social industry leaders through publications, policy papers, events, and discussions that produce useful ideas for the public sector	Access to the selected best-in-the-field knowledge and experiences, variety of events throughout the year, and network of partners and collaborators	Promoted activities motivate fruitful discussions and knowledge sharing to boost digital government implementation process

GovTech Case Studies: Spain





New models of digital relationship with citizens

Building digital channels that allow to rethink the relationship models between people, companies and public institutions

Digital public operations, data and administrative intelligence

Guaranteeing processing and public planning in remote work contexts and high volatility situations

Sustainability and tourism

Accompanying economy in evolution towards more sustainable models of production, consumption and tourism

Environment and waste management

Creating solutions for efficient management of waste and improvements in the environmental area

Assistance in management and social policies for vulnerable populations

Facilitating and streamlining the management and provision of support and assistance services

Think Tank

Global program aimed at funding research that sheds fresh light on issues related to the creation, usage, and control of digital technology

Summit

Center for identifying and prototyping commercially viable solutions to solve social problems

Lab

Meetings and forums for exchanging information, expertise, and resources motivate people to take on today's challenges.

DIGITAL FUTURE SOCIETY

Equitable Growth

Every citizen may contribute and thrive in an equitable society. In order for there to be sustainable economic growth, society must establish the prerequisites for people to have respectable occupations that boost the economy without endangering the environment.

Digital Trust and Security

The "correct" method to use data is not about what is technically possible, but rather about what society considers to be desirable. The long-term use of technology for the benefit of humanity must be supported by society's confidence in technologists, businesses, governments, and private individuals.

Public Innovation

Policymakers hardly ever have the time or space to clearly define the requirements for a successful tech-driven society because of the speed with which emergent technologies transform society and the volatility of the markets they drive. For governments to create pertinent legislation for the digital age, they must constantly play catch-up as technology growth outpaces them.

Citizen Empowerment and Inclusion

The development and spread of digital technology have a significant impact on citizen empowerment. A new set of established benchmarks for digital inclusion and updated, systematic methods to digital literacy are required if digital technologies are to become more broadly accessible enablers of citizen empowerment.

GovTech Case Studies: Austria

Society	Everyone, regardless of educational background, age, or gender, will be able to/will benefit from digitalization thanks to information and training. All citizens will be capable of utilizing new technologies to raise their standard of living.
Economy	Austrian businesses will be supported throughout their digital transformation to increase the nation's competitiveness. In order to increase knowledge within businesses, digital pioneers will network with well-established businesses.
Public Administration	To become a role model for modern, cizinen-focused EU public administration, current Austrian administrative processes will be upgraded to a mobile government as it should be as easy and user-friendly as possible to use them.

Digital Austria Fields of Action

Digital Economic Transformation

Support for the digital transformation, first-class trained specialists, effective research funding and new forms of financing

Education & Research

Digitization, modern teaching, high-quality training, further education and test rooms for innovations are key levers in the field

E-Government & Administration

Efficient and citizen-friendly administration brings more benefit to private individuals and companies since data is on the move

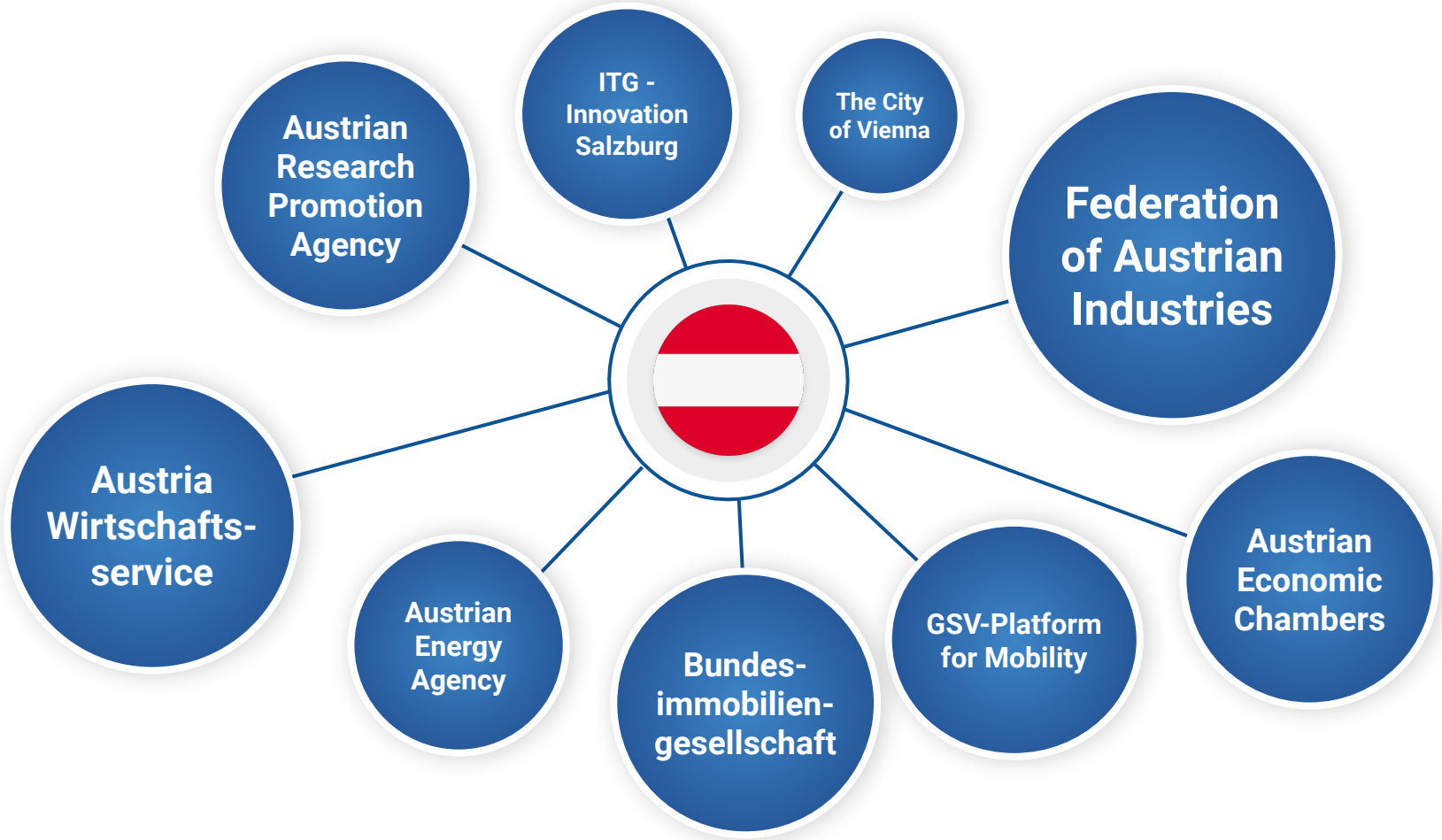
Healthcare

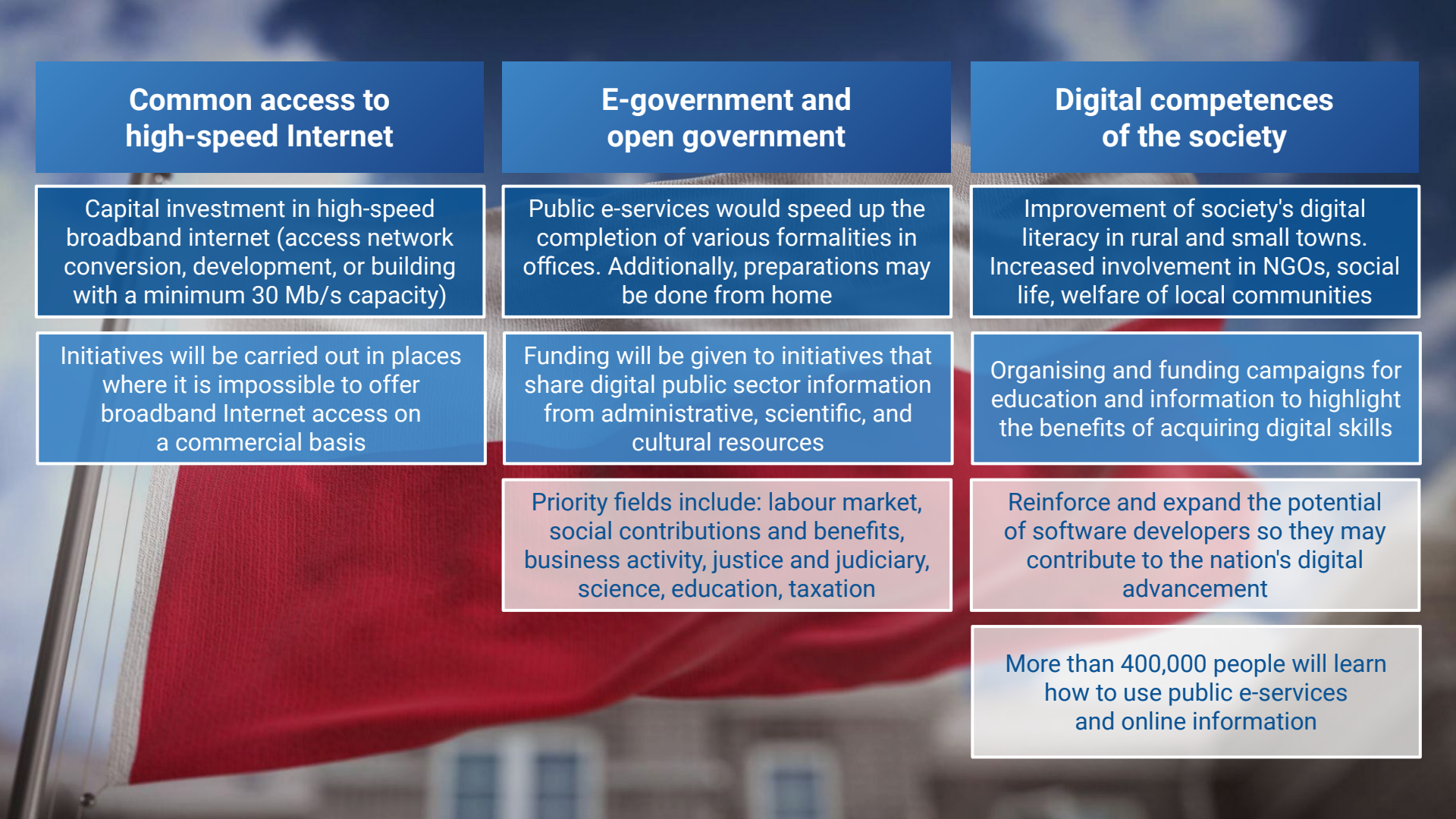
To ensure cutting-edge medicine and first-class care for everyone, Austria uses the potential of digitization for healthcare programs

Safety

Protection against attacks from outside is also an important contribution to equal digital opportunities at home

Innovation Procurement Network of PPPI Service Center





Common access to high-speed Internet	E-government and open government	Digital competences of the society
Capital investment in high-speed broadband internet (access network conversion, development, or building with a minimum 30 Mb/s capacity)	Public e-services would speed up the completion of various formalities in offices. Additionally, preparations may be done from home	Improvement of society's digital literacy in rural and small towns. Increased involvement in NGOs, social life, welfare of local communities
Initiatives will be carried out in places where it is impossible to offer broadband Internet access on a commercial basis	Funding will be given to initiatives that share digital public sector information from administrative, scientific, and cultural resources	Organising and funding campaigns for education and information to highlight the benefits of acquiring digital skills
	Priority fields include: labour market, social contributions and benefits, business activity, justice and judiciary, science, education, taxation	Reinforce and expand the potential of software developers so they may contribute to the nation's digital advancement
		More than 400,000 people will learn how to use public e-services and online information

GovTech Case Studies: Poland

Citizens

- Documents and personal data
- Education
- Driving license
- Vehicle registration
- Registration and elections
- Real estate and environment
- Taxes
- Legal assistance
- Work and business
- Family and marriage
- Military and security
- Health and social security
Foreigner’s services

Entrepreneurs

- Establishing a company
- Company development
- Employees in the company
- Anti-crisis Shield
- Taxes and accounting
- Social security
- Entrepreneur's obligations
- Permits, concessions, registers
- Professional qualifications
- Suspension and resumption
- Foreign trade

Clerks

- Public affairs
- Official documents
- Proceedings
- IT-Systems
- Grants
- Subsidies
- Real estate and environment
- Industrial property
- Patents
- Trademarks

Farmers

- Real estate and agricultural land
- Financial support
- Activity subsidies
- Social security
- Certificates, permits and registers
- Cultivation
- Animal breeding

GovTech Case Studies: Poland

Digital Festival	The biggest edu-tech project in Poland, the Digital Festival, demonstrates how to take advantage of modern technology's opportunities. The festival provides an opportunity to access free training platforms, participate in workshops, and acquire practical knowledge and digital skills.
digitalpoland	The Central and Eastern European region's largest technological enterprises are showcased via the program Digital Champions CEE. A series of meetings and interviews with digital leaders and reputable businesses are conducted in conjunction with the publication of the study, which offers a fair and transparent rating of the actual champions from the region.
digital shapers® Digital Shapers	A distinguished list known as "Digital Shapers" recognizes exceptional Poles working in the digital and new technology industries. The Digital Academy chooses individuals who have contributed far above average to the growth of the digital economy in our nation. The list's objectives are to honor the accomplishments of exceptional individuals and to encourage digital competence by way of good examples.

DIGITAL SWITZERLAND PRINCIPLES AND OBJECTIVES

Putting people at the forefront

To shape digital society, they must be constantly included in the digital transformation processes

Providing room for development

Political entities and authorities encourage digital change to the extent that they are able to support it

Facilitating structural change

The digital transformation calls into question traditional patterns of social interaction and economic activity

Networking the shaping of transformation processes

To take advantage of the opportunities brought by structural change these must be tackled in a cross-sectoral way

Enabling equal participation for all and strengthening solidarity

The equitable distribution of opportunities and viewpoints reinforces social solidarity and coexistence

Guaranteeing security, trust and transparency

Services that are open and data-driven foster respect and trust in matters of personal growth and autonomy

Strengthening digital empowerment

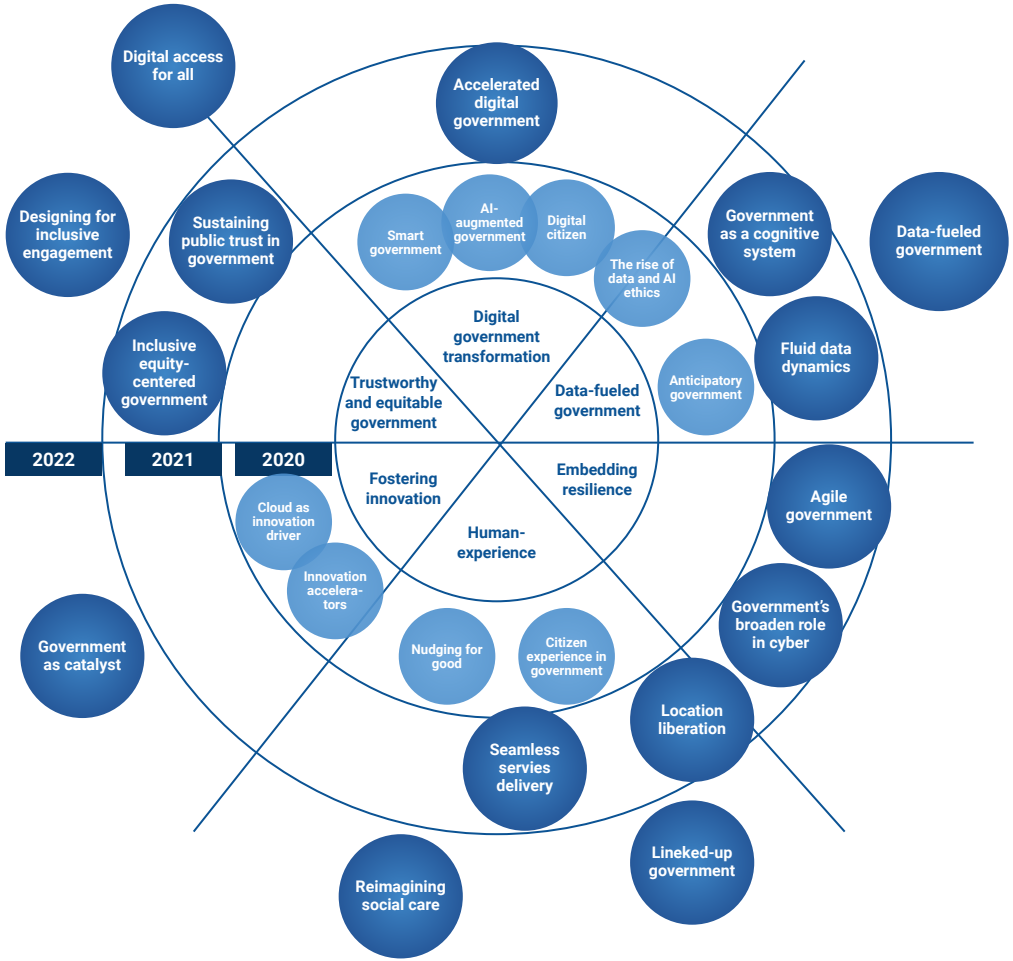
People should be able to participate competently in digitised political, social, cultural, and economic processes

Ensuring value creation, growth and prosperity

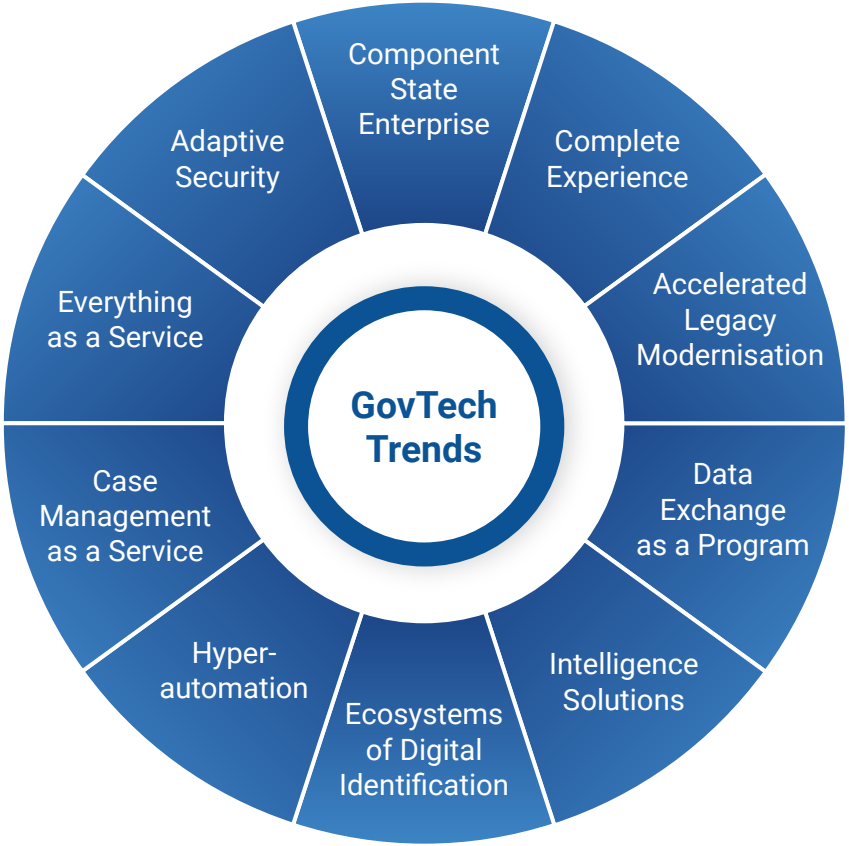
Barriers to trade and market access will be reduced so innovative businesses can thrive and competition is bolstered

Reducing the environmental footprint and energy consumption

To enhance climate and environmental protection, technologies must be applied intensively and strategically.


Digital access for all
Accelerated digital government
Designing for inclusive engagement
Sustaining public trust in government
Smart government
AI-augmented government
Digital citizen
The rise of data and AI ethics
Government as a cognitive system
Data-fueled government
Inclusive equity-centered government
Digital government transformation
Trustworthy and equitable government
Data-fueled government
Anticipatory government
Fluid data dynamics
2022
2021
2020
Fostering innovation
Embedding resilience
Human-experience
Cloud as innovation driver
Innovation accelera-tors
Agile government
Government as catalyst
Nudging for good
Citizen experience in government
Government's broaden role in cyber
Location liberation
Seamless servies delivery
Lineked-up government
Reimagining social care

GovTech Trends



GovTech Challenges

GovTech Challenges

Public Sector

Procurement processes in innovation mechanisms are considered uncertain and risky. Setting them up takes a lot of time, can use too many resources and have an uncertain result. In addition to risk perception, public institutions shy away from participating in public procurement of process innovations because they consider the task itself too difficult and the problem too complex to be able to solve.

Private Sector

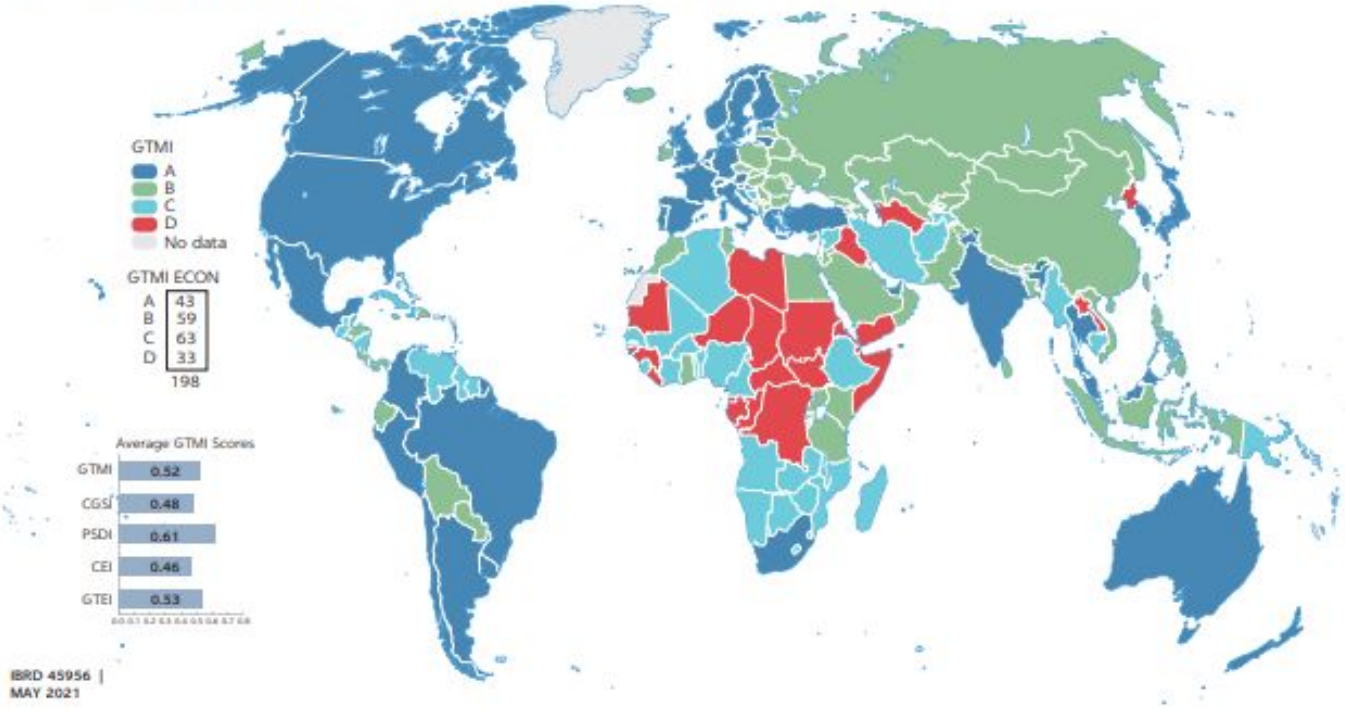
Dependence on venture capital is accompanied by the expectation of growth in conditions of limited market space.

A consolidated market space dominated by large system integrators.

Entry barriers: EU procurement standards for digital solutions in the public sector can be difficult to navigate for startups that lack the experience to interpret and implement them.

GovTech Projections

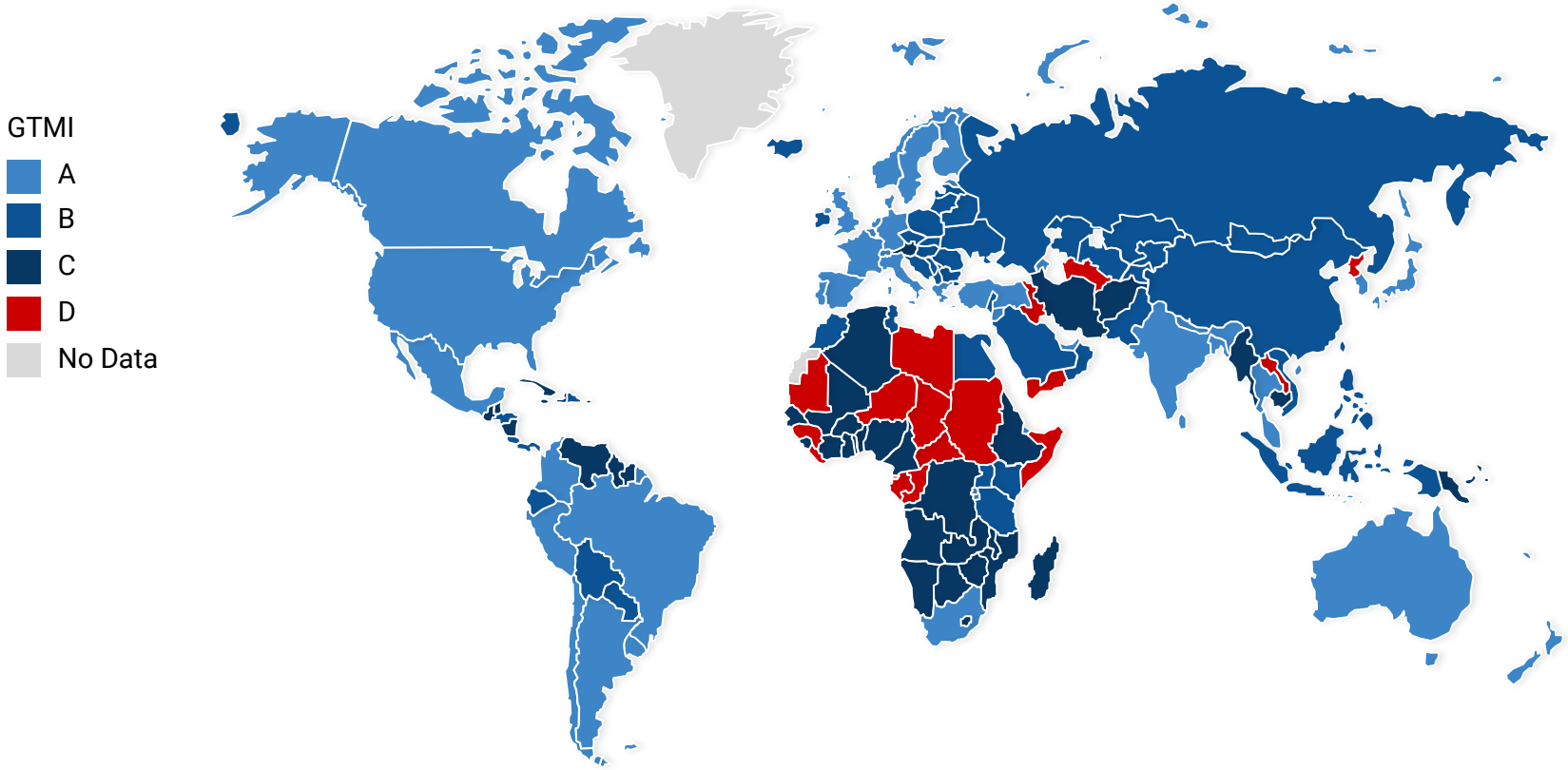
State of GovTech by GovTech Maturity Index



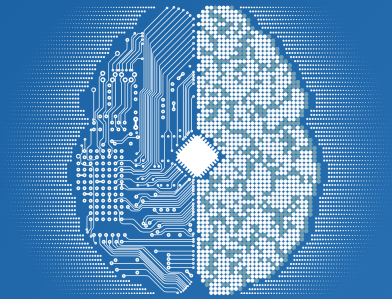
GROUP	GTMI	COUNTRIES OR ECONOMIES IN GROUP	ECON NUMBE
A	Very high: GovTech leaders	Argentina; Australia; Austria; Belgium; Brazil; Canada; Chile; Colombia; Croatia; Denmark; Estonia; Finland; France; Germany; Greece; Hong Kong SAR, China; India; Israel; Italy; Japan; Korea, Rep.; Lithuania; Luxembourg; Malaysia; Malta; Mexico; Netherlands; New Zealand; Norway; Peru; Portugal; Singapore; Slovenia; South Africa; Spain; Sweden; Switzerland; Thailand; Turkey; United Arab Emirates; United Kingdom; United States, Uruguay	43
B	High: significant focus on GovTech	Albania; Armenia; Azerbaijan; Bahrain; Bangladesh; Belarus; Bhutan; Bolivia; Bulgaria; Cabo Verde; China; Costa Rica; Cyprus; Czech Republic; Dominican Republic; Ecuador; Egypt, Arab Rep.; El Salvador; Georgia; Ghana; Honduras; Hungary; Iceland; Indonesia; Ireland; Jamaica; Jordan; Kazakhstan; Kenya; Kyrgyz Republic; Latvia; Mauritius; Moldova; Mongolia; Montenegro; Morocco; North Macedonia; Nepal; Oman; Pakistan; Panama; Paraguay; Philippines; Poland; Qatar; Romania; Russian Federation; Rwanda; Saudi Arabia; Serbia; Slovak Republic; Sri Lanka; Taiwan, China; Tanzania; Tunisia; Uganda; Ukraine; Uzbekistan; Vietnam	59

TABLE 3.1, *continued*

GROUP	GTMI	COUNTRIES OR ECONOMIES IN GROUP	NU
C	Medium: some focus on GovTech	Afghanistan; Algeria; Andorra; Angola; Antigua and Barbuda; Bahamas, The; Barbados; Belize; Benin; Bosnia and Herzegovina; Botswana; Brunei Darussalam; Burkina Faso; Burundi; Cambodia; Cameroon; Côte d'Ivoire; Cuba; Dominica; Eswatini; Ethiopia; Fiji; Grenada; Guatemala; Guyana; Haiti; Iran, Islamic Rep.; Kosovo; Kuwait; Lebanon; Lesotho; Liechtenstein; Macao SAR, China; Madagascar; Malawi; Maldives; Mali; Monaco; Mozambique; Myanmar; Namibia; Nicaragua; Nigeria; Papua New Guinea; Senegal; Seychelles; Sierra Leone; Solomon Islands; St. Kitts and Nevis; St. Lucia; St. Vincent and the Grenadines; Suriname; Syrian Arab Republic; Tajikistan; Timor-Leste; Togo; Tonga;	


GTMI
A
B
C
D
No Data

DEEP
KNOWLEDGE
ANALIYTICS
GOVTECH DIVISION



Link to the Report: www.govtech.global/govtech-longevity-governance	
E-mail: info@govtech.global	Website: www.govtech.global

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