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December 2025

Satisfaction, Fear, and Priorities:

*What Do Estonians Over 40 Say About
Social Choices?*



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Introduction

Estonians over 40 years of age have lived through major societal changes: Estonia's restoration of independence, the transition period and integration into the EU and the Eurozone. Their perspectives have been shaped by lived experience across different political and social systems. They make up a substantial portion of Estonia's population, and as the population ages, their relative share will only increase. They are not just numerous but also socially and politically influential. For example, approximately 72 per cent of current members of the Estonian parliament (Riigikogu) are aged 41 or older, underlining their strong presence in national decision-making.¹

This report reveals a society marked by both deep stratification and surprising consensus. Among Estonians aged 40 and above, perspectives on public life are shaped by lived experience, economic position and ethno-linguistic identity. But across this diversity, whether defined by income, education, geography or civic engagement, a unifying belief emerges in the form of a strong commitment to a supportive welfare state.

The public overwhelmingly prioritises core services such as health care, pensions and family support. The state is seen not only as a provider, but also as a guarantor of fairness and security. Even with regard to contentious issues such as taxation there is broad alignment around the idea that those with greater means should shoulder more responsibility. In this vision, social investment is not merely a safety net, but a pillar of dignity, cohesion and resilience.

At the same time, the analysis uncovers persistent structural divides. Political interest and participation are unevenly distributed. Highly educated and economically stable individuals are more likely to be civically and politically engaged, whereas Russian speakers, low-income earners and rural residents are significantly underrepresented. This produces a cycle in which economic vulnerability translates into political marginalisation and diminished representation.

Ethnic and regional divides also manifest in differing policy preferences, for example, between national defence versus welfare spending, or system-driven reform versus direct support. These divisions are shaped not only by material

inequality but also by varying levels of institutional trust and different historical reference points. However, shared concerns, such as economic insecurity, inequality or lack of access to services cut across social lines and offer a foundation for unity.

To better reflect the needs and expectations of Estonia's 40+ population, policy must balance long-term structural reforms with immediate social protection, responding to deep socioeconomic and regional divides.

First, investment in core public services, such as health care, pensions, family and elder care, should remain a top priority. These areas enjoy broad-based public support and are especially important for vulnerable groups. Attention must be paid to regional and linguistic disparities. Local governments in economically weaker areas, such as eastern and southern Estonia, need additional support to provide quality services. Inclusion of Russian-speaking residents requires better access to information and efforts to build institutional trust. Tax reform should reflect the public's desire for greater fairness, shifting the burden from consumption to wealth and capital. This would help to ensure sustainable funding for welfare services and address rising inequality.

Policymakers should also work to enhance political inclusion, particularly among underrepresented groups: low-income individuals, rural residents, Russian speakers and women. More accessible participation mechanisms and community outreach are key to democratic legitimacy. Finally, public communication around national security, the green transition and reform must be inclusive, transparent and equitable. Societal cohesion depends not only on what is done, but on how and for whom it is done.

¹ Members of the Riigikogu (n.d.). Available at: <https://www.riigikogu.ee/en/parliament-of-estonia/composition/members-riigikogu/> (last accessed 6 November 2024).

Four faces of political interest in Estonia's 40+ population

The survey results reveal four distinct segments that differ in terms of their level of political interest and societal engagement. These four segments offer a clearer understanding of the different attitudes and tendencies that shape how people engage in public life.

Politically engaged individuals (24 per cent) are highly active in politics. This group consists mainly of older men (65+), who are socially active, predominantly Estonian-speaking and tend to have higher education and income levels. Many in this segment (40 per cent) rate their financial situation as very good and are also active in cultural life. They can be found across the country, particularly among the elderly.

Passive followers (19 per cent) show little interest in politics unless issues directly affect them. This group includes more women and blue-collar workers, with a higher share of Russian speakers (28 per cent). They typically have lower levels of education and income, and only 2 per cent consider their financial situation to be very good. Cultural participation is low, and no clear regional pattern can be observed.

The disengaged (37 per cent) show almost no interest in politics or societal issues. They are socially and culturally inactive, have lower education and income levels, and are often subject to economic vulnerability. This is the largest segment and is broadly represented across the population.

Critical observers (20 per cent) show moderate interest and awareness but tend to be sceptical or critical of public institutions. This segment is demographically diverse, composed of working-age individuals with average education and income levels. While not actively participating in cultural life, they do follow politics and represent a viewpoint that should not be overlooked in policymaking.

Profiles of political interest groups among Estonian population aged 40 and over

Table 1

Political Interest Level	Profile Summary	Key Demographics	Ethnicity	Education	Financial Status	Cultural Engagement	Region / Age Group
Strong	Politically Engaged 24% highly involved in politics	Men (28%), aged 65+, socially active	Mainly Estonian	High (30%)	Very good (40%)	Yes (29%)	Nationwide (especially elderly)
Moderate	Informed Observer 47% follow news, but are not deeply involved	Mixed group (all sexes, ages, and occupations)	Estonian (48%) + Russian (47%)	All levels	All levels	Varied	No distinct pattern
Low	Passive Follower 19% little interest unless personally affected	Women (24%), blue-collar workers (30%)	Russian speakers (28%)	Mostly low or medium	Only 2% report very good	Low	No distinct pattern
Very Low	Disengaged Individual 9% avoids politics, skeptical or detached	40-49-year-olds (19%), low civic trust	Russian speakers (15%)	Very low (only 6%)	No distinct pattern	Very low	Northeastern Estonia

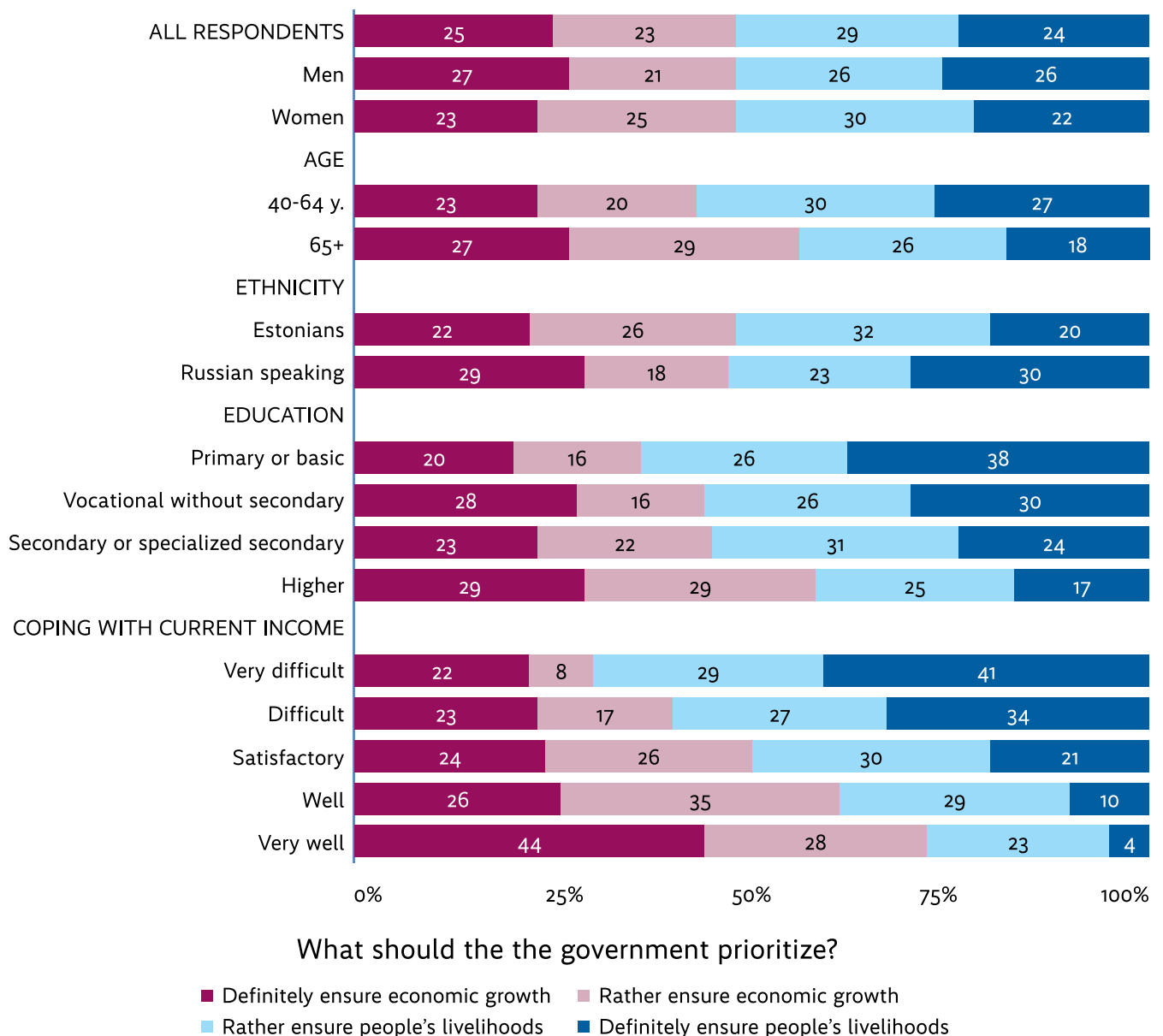
Government priorities: should the focus be on securing economic growth or ensuring people's livelihoods?

Estonian society is split between two priorities; public opinion is quite evenly divided: 48 per cent lean towards securing economic growth (“definitely” or “rather”), while 53 per cent lean toward ensuring people’s well-being (“definitely” or “rather”) This indicates a societal debate in which both economic growth and social protection are seen as important, but with a slight leaning towards social safety nets.

Men are more likely to prioritise economic growth (27 per cent say “definitely”) than women (23 per cent). Women, on the other hand, are slightly more inclined to prioritise people’s well-being. Younger respondents (40–49) lean more towards ensuring people’s livelihood (32 per cent say “definitely”), while older age groups place slightly more emphasis on economic growth.

Preference for economic growth vs social protection by population group, *n=1011*

Figure 1



Estonian speakers and ethnic Estonians are more likely to support economic growth. Russian speakers and ethnic Russians more often prioritise people's well-being; for example, 30 per cent of Russian speakers chose "definitely people's livelihood" compared with just 22 per cent of Estonian speakers. This may reflect differences in socioeconomic status and trust in institutions.

People with Estonian citizenship lean more towards economic growth, while those with Russian citizenship or undefined status lean more towards livelihood protection.

Respondents with higher education prioritise economic growth (29 per cent "definitely"), while those with only basic education prefer livelihood (20 per cent "definitely"), suggesting that wealthier or more resourceful people may see economic growth as benefiting them more directly.

People who rate their economic situation as very good support economic growth more (44 per cent). Those in a difficult financial situation heavily prioritise social protection (41 per cent "definitely livelihood" among those who find it "very difficult"). Tallinn and urban populations lean more toward economic growth. Northeastern Estonia (Ida-Viru), rural areas, and South Estonia show more support for social protection, possibly reflecting regional inequalities.

Thus, the Estonian population is relatively split in terms of its priorities between long-term economic development and immediate social welfare, with personal demographics and socioeconomic standing playing a large role in shaping opinions. More privileged or higher-status groups (men, higher-educated, Estonian nationals, urban dwellers and professionals) are more inclined toward economic growth. Less privileged or vulnerable groups (women, Russian speakers, pensioners, the unemployed, rural residents, lower-income households) are more likely to expect the state to focus on helping people cope with everyday life.

This division highlights the need for balanced public policy that responds both to structural economic goals and to the everyday needs of vulnerable populations.

Where should the money go? Public preferences in budget allocation

If additional funds become available in the state budget, they should be directed primarily **towards improving health-care services**. This priority is consistently high across all demographics: gender, age, education, employment, region and political interest levels.

Some 35 per cent overall support allocating funds **to raise pensions**. This is particularly supported by pensioners themselves (44 per cent), people in financially difficult situations (“very hard” – 48 per cent); Russian-speaking respondents (52 per cent) and those with basic education (49 per cent). This shows concern for aging and vulnerable populations.

Support for families with children is stronger among younger age groups (40–49: 41 per cent), women and respondents with children and lower incomes.

Support for **education development** stands at 32 per cent overall, with higher prioritisation among respondents with higher education (47 per cent), people aged 40–49

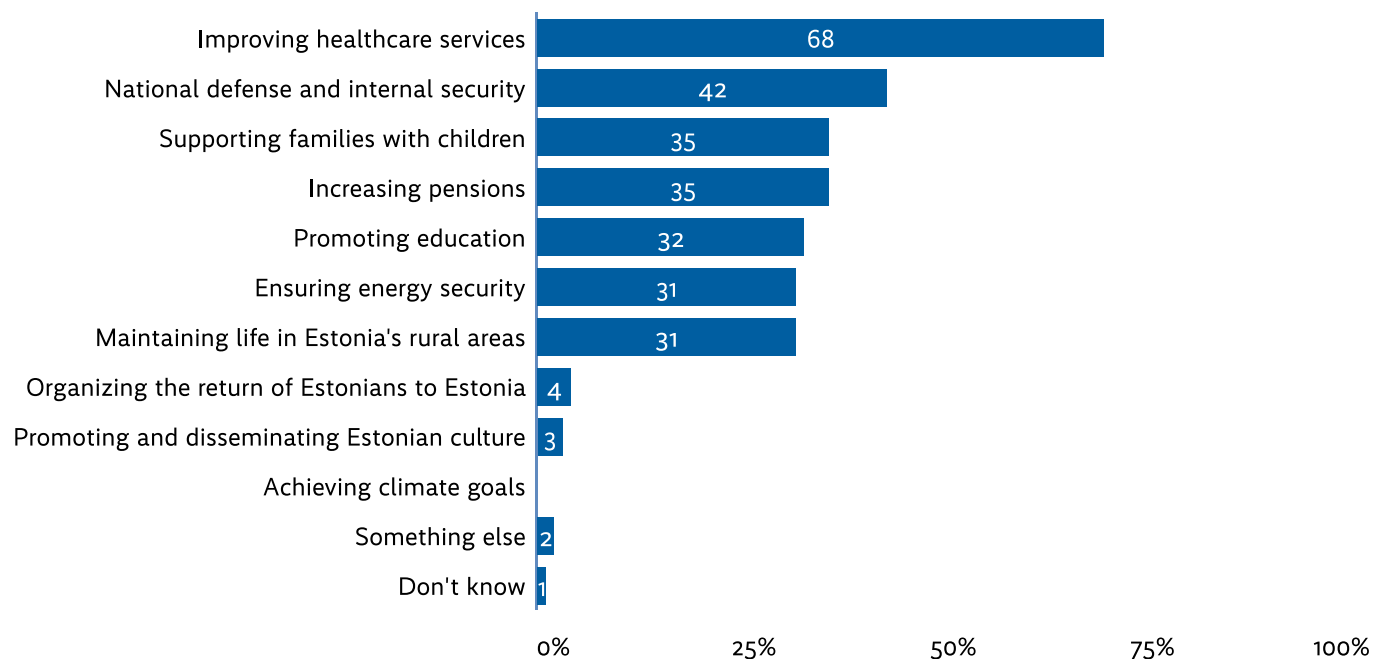
(43 per cent), and Russian speakers rather than Estonians (48 per cent vs 24 per cent).

Investment in energy security – 31 per cent support allocating funds to energy security. There is stronger support among men (39 per cent), people interested in politics and higher economic status groups. This reflects concern with strategic independence and inflation/price issues.

Defence and internal security (42 per cent) is one of the top priorities for the Estonian population. It is especially important among older people, particularly those aged 60–69, among whom 50 per cent consider it a key area. Support is also strong among Estonian speakers (57 per cent), men and politically engaged respondents. However, it is also the most polarising topic: support among Russian speakers is very low, with only 11 per cent mentioning it as a priority. This highlights clear ethnic and linguistic divides with regard to how national threat or defence issues are perceived.

Preferences for government budget allocation across policy areas among respondents aged 40 and over, n=1011

Figure 2



■ If additional funds become available in the state budget, where should they be directed primarily? %

Support for the development of peripheral areas and regional equity stands at 31 per cent, showing that this issue matters especially to older age groups (70+), rural residents and people living in south and central Estonia. Support for this is also notably high among Russian-speaking respondents, at 42 per cent, pointing to geographical inequalities that remain a public concern.

Culture and climate appear to be among the least prioritised areas. Only 3 per cent of respondents support setting aside additional funds for cultural development and dissemination, while climate goals receive 0–1 per cent support. Even among those who are culturally active, climate change remains the lowest-ranked concern, reflecting limited urgency compared with economic, social and security-related issues.

The idea of supporting the return of diaspora Estonians is also a very low priority overall, with only 4 per cent of respondents considering it important. Slightly higher support can be found among people with a strong national identity, and some respondents in Tallinn and in globally connected professions. However, it is generally not viewed as an urgent matter by the broader public.

Russian-speaking respondents tend to prioritise social services, such as health care, pensions, education and family support, more than ethnic Estonians. In contrast, Estonian

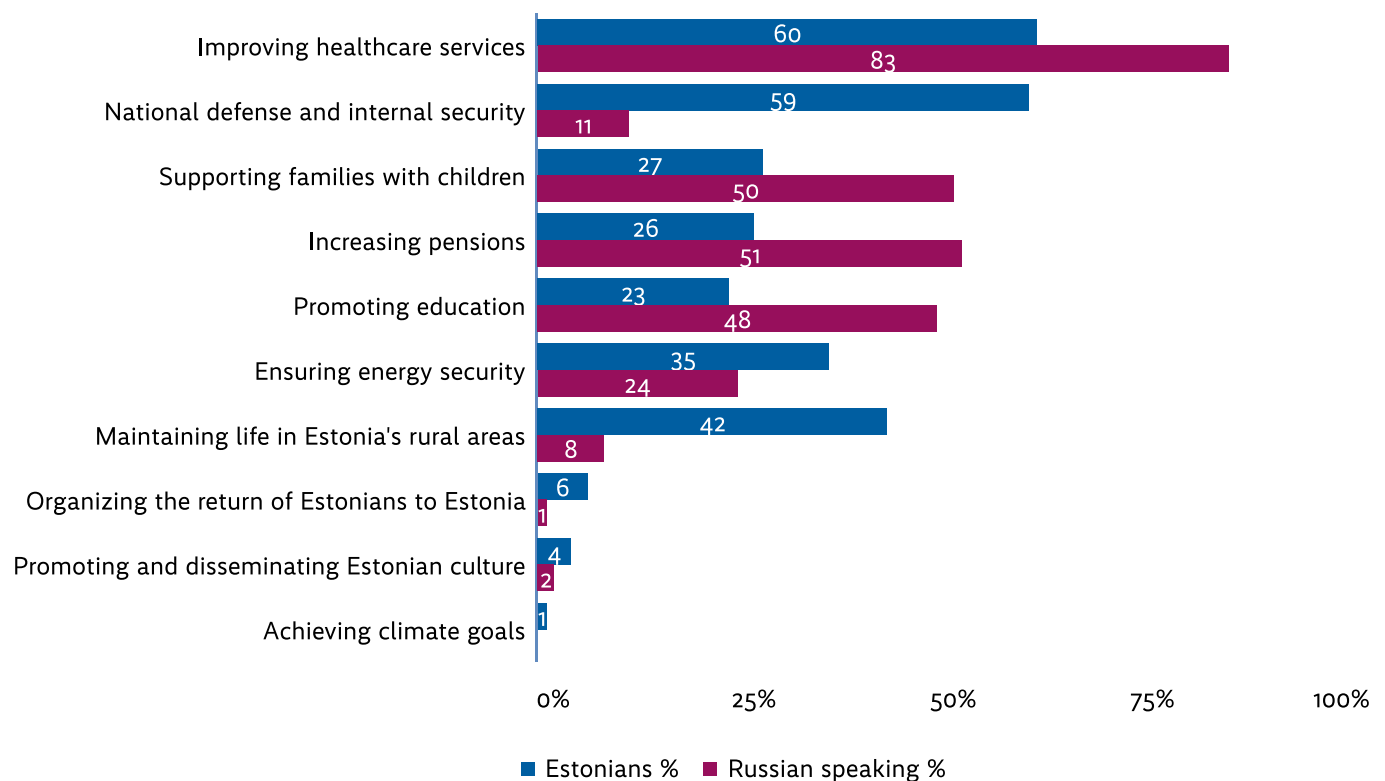
respondents put greater emphasis on national defence, internal security, rural vitality and energy independence. While national identity topics rank low across both groups, they are slightly more important for Estonians. Interest in climate-related goals is minimal for both.

These contrasts may partially reflect differing perceptions of national security, especially regarding the perceived threat from Russia. Estonians may feel more directly affected by geopolitical tensions and therefore attach higher importance to security-related issues. Russian-speaking respondents, on the other hand, may view social and economic stability as more pressing concerns. Other factors, such as differences in media consumption, socio-economic status or trust in institutions, may also play a role, although they remain speculative, based on the available data.

The priorities of Estonians over 40 years of age are therefore clear: health care comes first, as a universal need transcending demographics. Following that, people are split between economic security (pensions, family support, energy) and strategic concerns (defence, education, regional equity). However, the data also reveals marked differences between groups based on age, ethnicity, region, education and political interest, which must be considered when planning fiscal policy and public investments.

Preferences for government budget allocation across policy areas among respondents aged 40 and over, n=1011

Figure 3



Public support for social policy proposals: context and controversies

The data reveals how the Estonian population evaluates and supports various policy initiatives. Overall, there is strong support for proposals that are directly related to basic needs and social welfare, while more polarising or market-based reforms tend to receive less public approval.

The idea that **care home placements should be accessible within the level of a basic pension** receives overwhelming support (92 per cent). However, recent audits show that this goal is increasingly **unrealistic**. Despite reforms injecting €100 million into the system, the average pension still **does not cover care home costs**, with one in three people unable to afford their share even after municipal support. This highlights a **gap between public expectations and policy feasibility**, raising questions about long-term sustainability and funding mechanisms.²

Similarly, the proposal that **municipalities should provide home-based services for the elderly** garners near-universal support (96 per cent). This reflects a strong societal preference for aging in place, especially among women, older people and rural residents. Implementation depends heavily on **local government capacity**, however, which varies across regions. For example, some municipalities, particularly in eastern and southern Estonia, struggle with budget deficits or staff shortages in social services, limiting their ability to expand home-based care, whereas wealthier municipalities are better positioned to do so.

Raising child benefits is supported by 85 per cent of respondents, especially among younger adults and financially vulnerable households. This aligns with Estonia's broader demographic concerns and efforts to support families. However, sustaining such support faces challenges, including fiscal limitations and unequal access to services across the regions.

Increasing **patient co-payments** is deeply unpopular (71 per cent oppose), particularly among women and low-income groups. Estonia's health-care system is funded largely through social taxation, but out-of-pocket payments for medicines and dental care remain high, disproportionately affecting poorer households. WHO reports indicate that health spending often leads to financial hardship, above the EU average, and coverage gaps per-

sist, especially for adult dental care and outpatient prescriptions.^{3,4}

Making **higher education fee-based** is opposed by 59 per cent, with the strongest resistance coming from middle-aged Estonians and lower-income groups. While some support exists among business owners, the debate reflects broader concerns **about accessibility and social mobility**.

The proposal to **increase national defence spending at the expense of social and health-care services** is one of the most divisive issues. Some 75 per cent oppose it, with clear ethnic and economic divides: Estonian-speaking men with higher education are more supportive, while Russian-speaking pensioners and low-income people are strongly opposed. This reflects **deeper societal tensions** around national priorities and perceived fairness.

The idea of a **real estate tax – exempting primary residences** – receives moderate support (64 per cent). Estonia currently taxes land value only, not buildings, and exemptions for personal-use residential land are already in place under certain conditions. Support is higher among lower-income groups, suggesting public alignment with **principles of progressive taxation**.⁵

Introducing **private health insurance for higher earners** is controversial, with 48 per cent opposed. While wealthier urban dwellers show some support, the majority view it as a threat to equity in health-care access.

Linking **pension levels to lifetime earnings** is supported by 64 per cent, but Russian-speaking and lower-income groups are more cautious. A more controversial idea – tying pensions to personal savings – is rejected by 58 per cent. Estonia's pension system has undergone significant reforms, including making the second pillar voluntary,

² ERR News (2025): *Audit: Nursing home care for average pension increasingly unrealistic*. ERR, 5 February. Available at: <https://news.err.ee/1609596035/audit-nursing-home-care-for-average-pension-increasingly-unrealistic>.

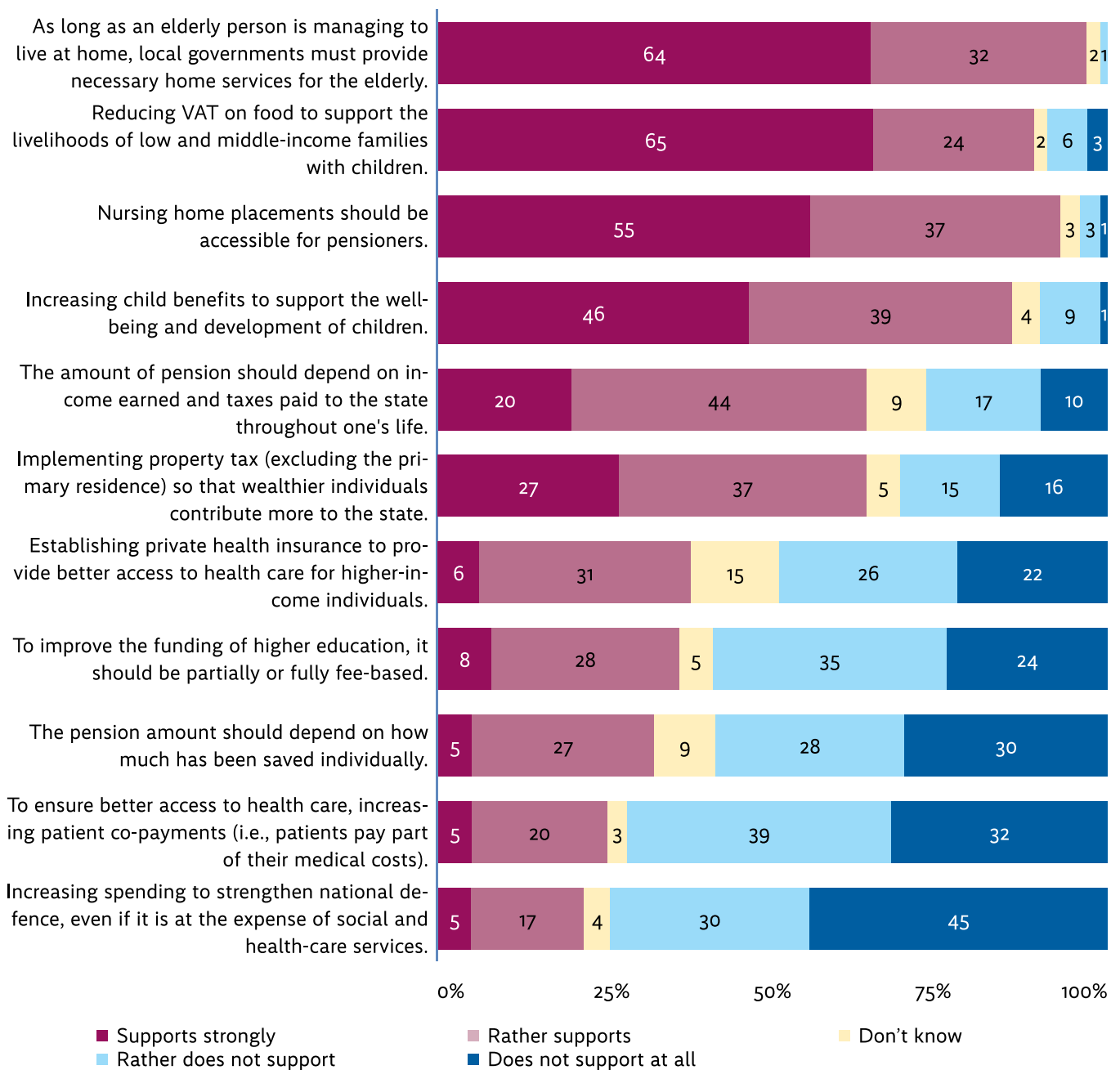
³ World Health Organization (2023a): *Can people afford to pay for health care? New WHO report on Estonia identifies policies to make health care more affordable for people with low incomes*. World Health Organization Regional Office for Europe. Available at: <https://www.who.int/europe/publications/i/item/9789289060714> (last accessed 22 October 2025).

⁴ World Health Organization (2023b): *New WHO report on Estonia identifies policies to make health care more affordable for people with low incomes*. World Health Organization Regional Office for Europe. Available at: <https://www.who.int/europe/news/item/12-12-2023-new-who-report-on-estonia-identifies-policies-to-make-health-care-more-affordable-for-people-with-low-incomes> (last accessed 22 October 2025).

⁵ Eesti Ltd (n.d.): *Property tax in Estonia*. Available at: <https://www.eesti.ltd/en/taxation/property/> (last accessed 22 October 2025).

Levels of support for specific policy initiatives among respondents aged 40 and over, n=1011

Figure 4



which led to early withdrawals and raised concerns about elderly poverty and long-term sustainability.⁶

Introducing private health insurance for higher earners is controversial, with 48 per cent opposed. While wealthier urban dwellers show some support, the majority view it as a threat to equity in health-care access.

Figure 5 presents the differences between Estonians and

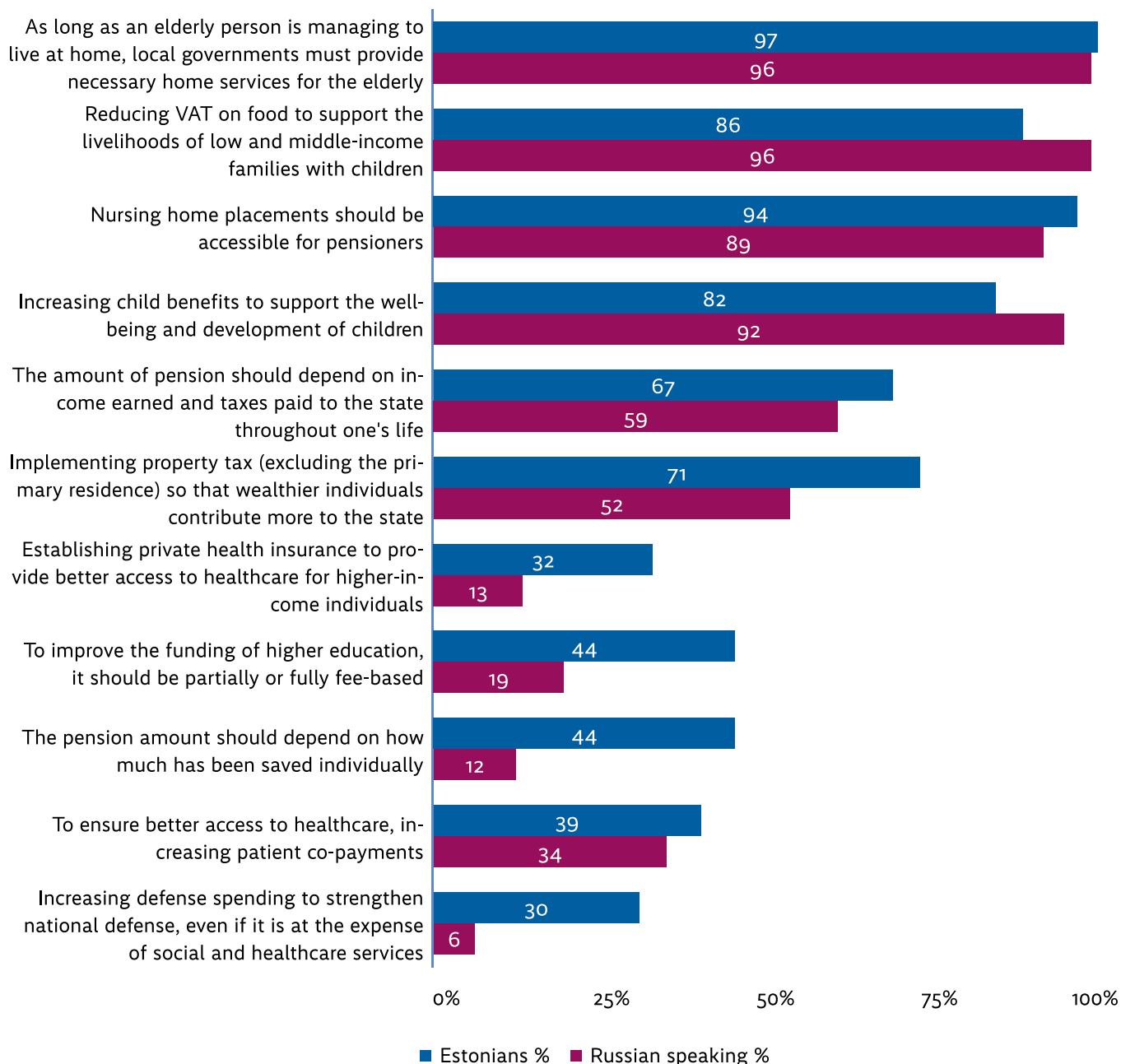
Russian-speaking residents in terms of their support for political initiatives.

Russian speakers show stronger support for social protection measures, including child benefits and VAT reduction. Estonians are more supportive of individual responsibility and system-based reforms, such as pension differentiation, private health-care options, tuition fees and property taxation.

The sharpest divides appear in relation to education funding, private pensions and national defence spending, with markedly lower support among Russian-speaking residents.

⁶ Meriküll, J. (2025): The impact of early II pillar pension withdrawals on household saving, in: *Eesti Panga toimetised* 4/2025). Eesti Pank. Available at: https://haldus.eestipank.ee/sites/default/files/2025-04/wp_2025_04.pdf.

Support for specific policy initiatives among Estonian- and Russian-speaking respondents



Support for universal elderly care services (for example, home care and nursing homes) is very high across both groups, showing strong consensus.

This contrast suggests differing value orientations: collective support systems resonate more with Russian-speaking respondents, while Estonian speakers are more likely to endorse reforms aligned with merit-based or contributory models.

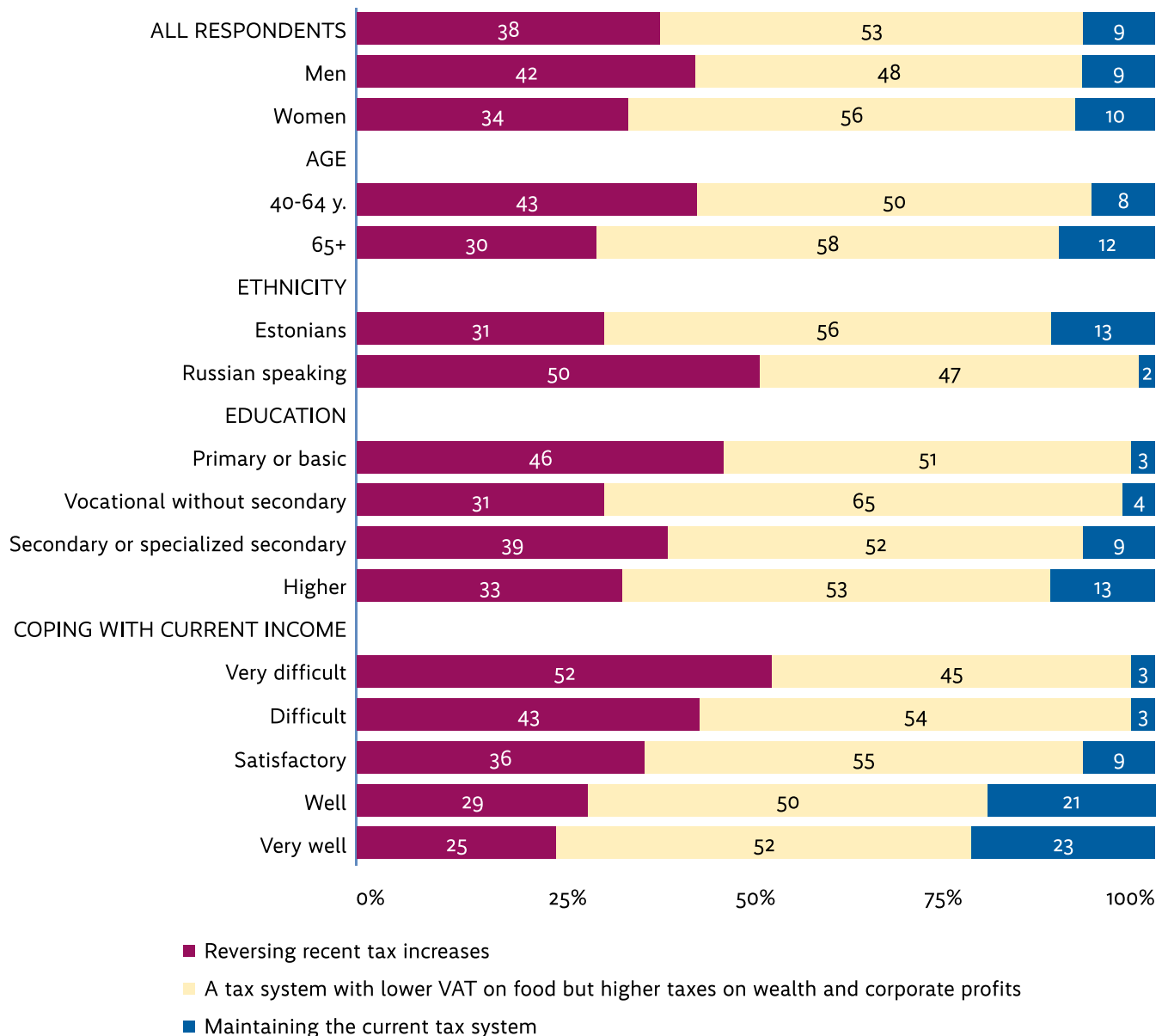
Beyond the status quo: people over 40 call for tax reform

Estonia is known for its simple and transparent tax system, often praised internationally for its efficiency and clarity. However, the tax system has faced growing pressure to increase revenue for public services and defence. The recent VAT increase and reform of the basic exemptions are central topics in tax policy debates.

The data shows that the population over 40 years of age supports taxation model, focusing on reducing VAT on food while increasing taxes on wealth and corporate profits. Across the population, 53 per cent favour this type of tax system. This preference is most common among people with lower education levels and those who rate their

Preferences for alternative tax system options, n=1011

Figure 6



household's economic situation as difficult. For example, 76 per cent of respondents with only basic education and 74 per cent of those who find it very difficult to make ends meet support this approach. It is also more popular among women than men, and among Russian-speaking residents compared with Estonians

In contrast, 38 per cent of respondents support reversing recent tax increases. This perspective appears more common among men, residents aged 40–49 (46 per cent), people with higher education and income, and the politically engaged. Entrepreneurs and managers also show higher-than-average support for tax cuts, with 54 per cent of managers backing this view.

Only 9 per cent of respondents would like to maintain the current tax system as it stands. Support for the status quo is slightly higher among those in better financial circumstances or in high-status positions, such as people with higher education, living in Tallinn and with stronger political interests. Thus, only a small minority believe that the current system should remain unchanged, indicating a general desire for tax policy reform.

Economic strain, cultural shifts and sovereignty: Estonia's anxiety landscape

The survey data reveals a clear hierarchy in terms of public fears and concerns about Estonia's future, based on the percentage of respondents who chose the highest level of worry (rating 5). Several dominant patterns emerge.

Top of the list is economic instability: 51 per cent of respondents are deeply concerned about **potential stagnation, rising prices and growing poverty**. These fears are most intense among financially vulnerable groups, the elderly and those with lower levels of education, reflecting real anxieties about day-to-day survival.

Close behind, 49 per cent express strong concern about **expanding bureaucracy and growing state spending**, especially among those who feel overwhelmed by existing public systems or perceive government inefficiency.

Fears of rising inequality also weigh heavily on the public. Some 41 per cent are alarmed by the concentration of wealth, fearing a future in which a few prosper while others are left with little savings. This issue resonates most with people already struggling economically.

Concerns about national sovereignty and external influence are also notable. Some 41 per cent feel that Estonia may be following EU directives from Brussels too uncritically. This sentiment is especially prominent among Estonian speakers, older citizens and the politically conservative, groups often more susceptible to issues of self-determination.

In line with long-term national anxieties, 36 per cent worry about **declining birthrates**, particularly the fear that ethnic Estonians may one day disappear. This concern is rooted in national identity and is more prevalent among groups with traditional or culturalist views.

Environmental issues also surface, with 34 per cent concerned about destruction of nature in the name of profit. This reflects growing global and local awareness of ecological loss, even though these concerns are often secondary to immediate economic pressures.

Immigration and integration issues are also prominent: 31 per cent are worried about large-scale immigration marginalising Estonians, mainly among rural and older populations.

Estonians are far more alarmed by **pro-Russian sentiment**, with 48 per cent selecting either 4 or 5 (concerned or very concerned). These differences likely reflect contrasting media environments, historical narratives and perceptions of what constitutes a threat to national integrity. Among Estonians heightened concern may stem from security fears linked to Russia's regional actions. Among Russian-speaking residents, the issue may be viewed more neutrally or dismissed entirely, possibly reflecting greater identification with Russian-language media or perceived marginalisation in national discourse. This divide underlines the importance of inclusive communication and awareness-building across communities, particularly on sensitive topics tied to national identity and geopolitical orientation.

Cultural anxieties are expressed by 31 per cent, who say they are deeply uncomfortable with the promotion of so-called "gay propaganda" and feminism. These views are more common among men, political conservatives and those with strongly traditional values.

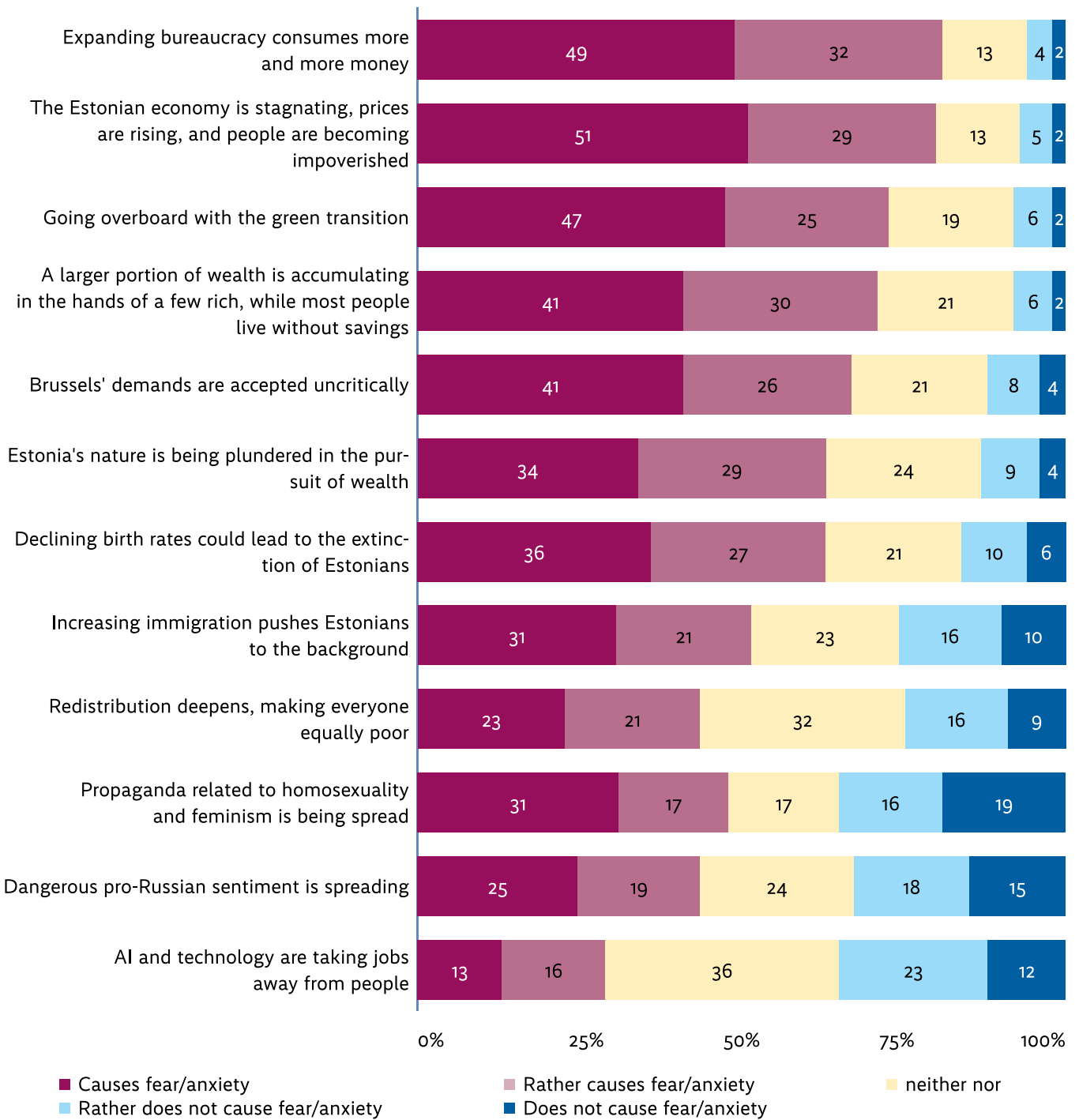
One of the most polarising issues is **the green transition**, which 47 per cent fear is going too far, too fast. This is a more common view among lower-income and rural residents wary of additional financial burdens. By contrast, technological concerns are relatively low.

Only 13 per cent are very worried about **AI and automation**, with redistribution policies (13 per cent) and digital dependency (12 per cent) eliciting similar levels of concern. These topics may be more visible in media and policymaking circles than in everyday public priorities.

Public concern in Estonia is dominated by economic pressures, such as inflation, inequality and state overreach. Cultural and identity-based fears, particularly around immigration, birthrates and values, are also widespread. Meanwhile, concerns about technology and EU integration are more politically polarised, and environmental fears, though present, remain secondary to immediate material anxieties.

Perceived threats and sources of anxiety among respondents aged 40 and over, n=1011

Figure 7



Final word: striking a balance for a cohesive and inclusive Estonia

In summary, the views of Estonian residents over the age of 40 indicate that Estonian society faces complex and often conflicting priorities. On one hand, there is strong support for social investment, but on the other, there is considerable concern about economic growth. While there is widespread endorsement of a robust welfare state and essential services such as health care and social protection, significant structural divides remain. These divides, rooted in people's ethnic, educational and socio-economic backgrounds, complicate the inclusivity and effectiveness of policy responses.

In the current tense geopolitical situation, it is imperative for policymakers to consistently acknowledge the importance of social cohesion. Ensuring equal treatment of all citizens and amplifying their voices in democratic processes is vital. Particular attention must be paid to the inclusion of vulnerable groups, such as low-income individuals, rural residents and non-Estonians.

Efforts should also focus on investing in health care and social welfare, as well as devising strategies to bridge gaps in political participation. Furthermore, implementing tax reforms that distribute the tax burden fairly by reducing reliance on consumption and enhancing the contribution from wealthier sectors would be a prudent step forward.

It is crucial to seek solutions to the perceived trade-off between national defence and social welfare, which has the potential to cause, and is already causing, polarisation.

A balanced policy framework that considers the voices of all socio-demographic groups is crucial for Estonia's future well-being and democratic integrity. Looking ahead, fostering a collective identity that embraces diversity and considers the fears and hopes of all citizens is key to building a united and resilient society.

Research design

Technical characteristics of the survey

Target population: Residents of Estonia aged 40 and above. According to Statistics Estonia (as of 1 January 2025), there were 744,432 individuals in this age group. The survey was conducted nationwide.

Sample size: The study was based on responses from 1,011 participants.

Sampling and data collection: The data was collected through an online survey administered via the Turu-uuringute AS web panel. After fieldwork was completed, the sample was reviewed and adjusted to align with population distributions based on gender, age group, ethnicity and region. Weighting procedures were applied to ensure representativeness. Data for the study was collected between 15 and 26 July 2025.

About the author

Iivi Riivits-Arkonsuo, PhD, is a scholar whose career bridges both academic research and applied social studies. She is currently affiliated with Tallinn University of Technology as an associate professor, contributing to the academic community through teaching, research and stakeholder engagement.

Prior to her academic role, Iivi spent many years as a research manager at Turu-uuringute AS, Estonia's leading public opinion and marketing research company. Her extensive experience in designing and leading studies has provided her with deep insights into societal trends and stakeholder behaviour.

Her research interests and scientific publications focus on stakeholder engagement, digital transformation and the digital divide, topics that are increasingly relevant in today's rapidly evolving technological landscape.

Satisfaction, Fear, and Priorities:

What Do Estonians Over 40 Say About Social Choices?



Estonians over 40 have lived through the Soviet period, the restoration of independence and integration into the EU and eurozone. This report asks what these experiences have taught them about justice, security, and the role of the state – and what kind of Estonia they want for the future.



Based on a nationwide survey of residents aged 40+, it reveals a paradox: a society divided by income, education, region and language, yet united in its demand for a strong welfare state. Across groups, people prioritise healthcare, pensions and support for families and older people, and favour a fairer tax system that shifts the burden from consumption toward wealth and capital.



The analysis identifies four patterns of political interest and shows how socioeconomic status, language, and place of residence shape views on spending, reform, and national security. It maps the main hopes and fears – from economic insecurity and inequality to identity, immigration and the pace of the green transition – and explores how policy can balance growth, protection and social cohesion in an ageing and increasingly polarised Estonia.

Further information on this topic can be found here:

➤ baltic.fes.de