The Government Executive Series

Leadership in Customer Service: New Expectations, New Experiences

accenture

High performance. Delivered.

• Consulting • Technology • Outsourcing

High performance in government

Accenture research suggests that high performers in the public sector base the value they create on two criteria: the outcomes they deliver and the cost-effectiveness they achieve. They look at value from the perspective of the citizen—the primary stakeholder and most important beneficiary of government activities. By focusing also on cost-effectiveness, high-performance governments strive not only to do the right things, but also to do them in the right way.

High-performance governments share some common characteristics. They generate maximum public value. They are relentlessly citizen-centered and outcome-focused. Their capabilities and operational activities all support the delivery of outcomes defined by their mission, and they measure their performance based on those outcomes—not just inputs and outputs. At the same time, high-performance governments are committed to cost-effectiveness. They hold themselves accountable and they make their operations and results transparent to all. They are innovative and flexible, continually striving to improve value delivery, and are able to respond creatively to new challenges and opportunities. They work in open and collaborative ways, understanding that their organization is part of a larger system, and cultivating working relationships with other agencies, organizations and stakeholders. Finally, high-performance governments reflect their enthusiasm for delivering public value. This evident passion engages both internal staff and external stakeholders in active support of their organizations' missions.

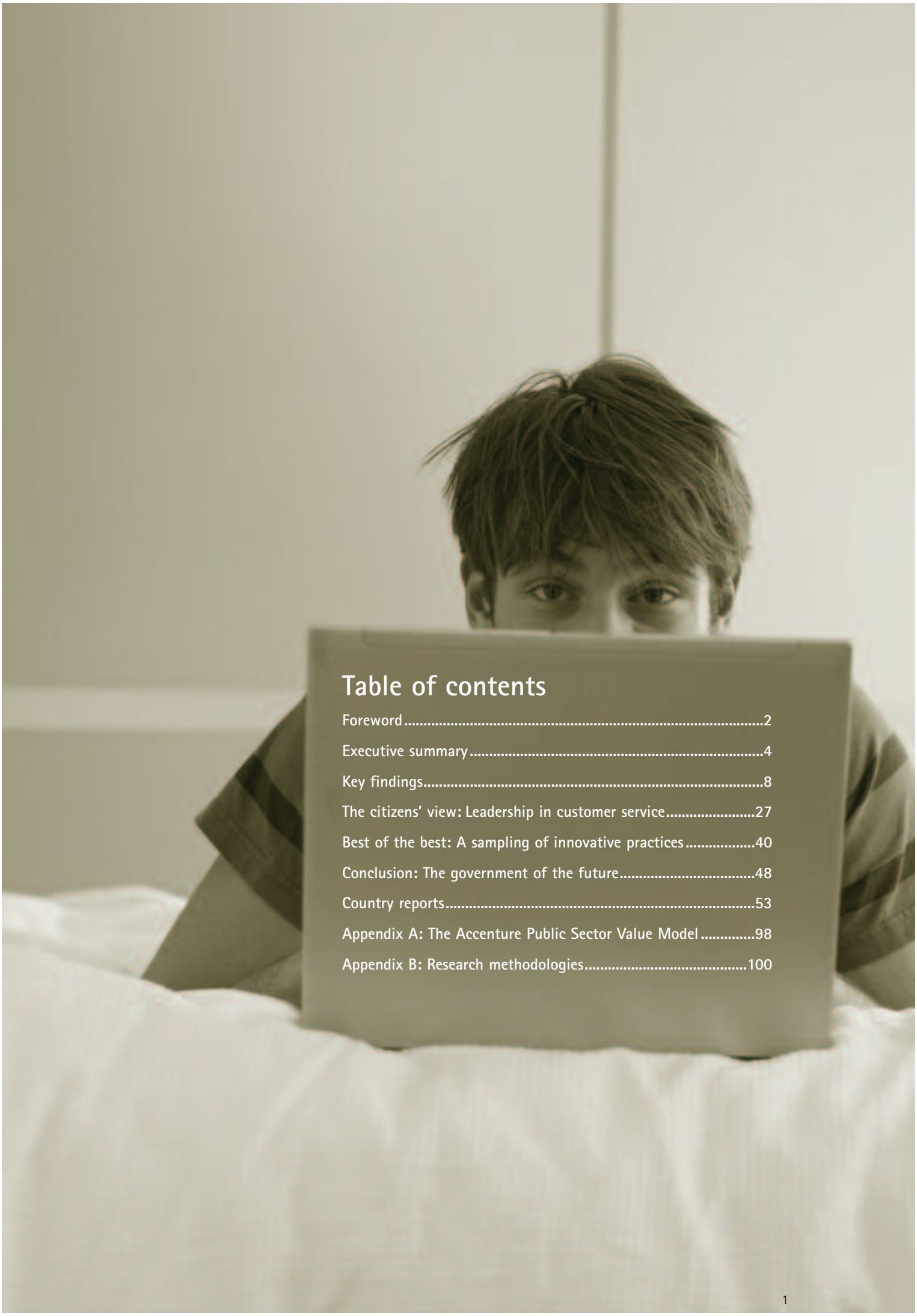


Table of contents

Foreword

For five years Accenture has examined global trends in eGovernment—governments' practices and progress related to delivering services online. We have seen governments evolve from their first tentative steps publishing information online to developing sophisticated interactive and transactional capabilities across a broad range of services.

Over time, however, we began to see that governments were nearing the limits of where they could take service delivery through a focus on eGovernment alone. As governments approached the point of having at least some aspects of all of their services online, it became time for them—and for us—to ask, What value has come of this?

Clearly, eGovernment has delivered value. Perhaps more than any other channel of service delivery, eGovernment can deliver dramatic improvements in the reach of services, the ease of interaction and the costs of service delivery. What it cannot do in and of itself, however, is lead to the sweeping transformation of government service that will lead to high performance—generating the outcomes citizens want and that governments need to deliver.

This change is bigger than eGovernment alone; it implies an entirely new vision of leadership in customer service—one that is proactive and embraces the concepts of cross-government, citizen-centered and multi-channel interactions. While eGovernment is a catalyst of this change, it is also only one (albeit important) component of the change.

This year our report, *Leadership in Customer Service: New Expectations, New Experiences*, looks at the many facets of future leadership in service delivery. Our methodology has changed and many of our rankings have changed as a result. A number of eGovernment leaders from years past now find themselves with significant work to do to meet the new expectations of their current and future customers. What citizens say about their current experiences and what they desire from government indicate the challenges governments currently face. For now, governments are simply not keeping pace in their ability to deliver in line with citizen expectations.

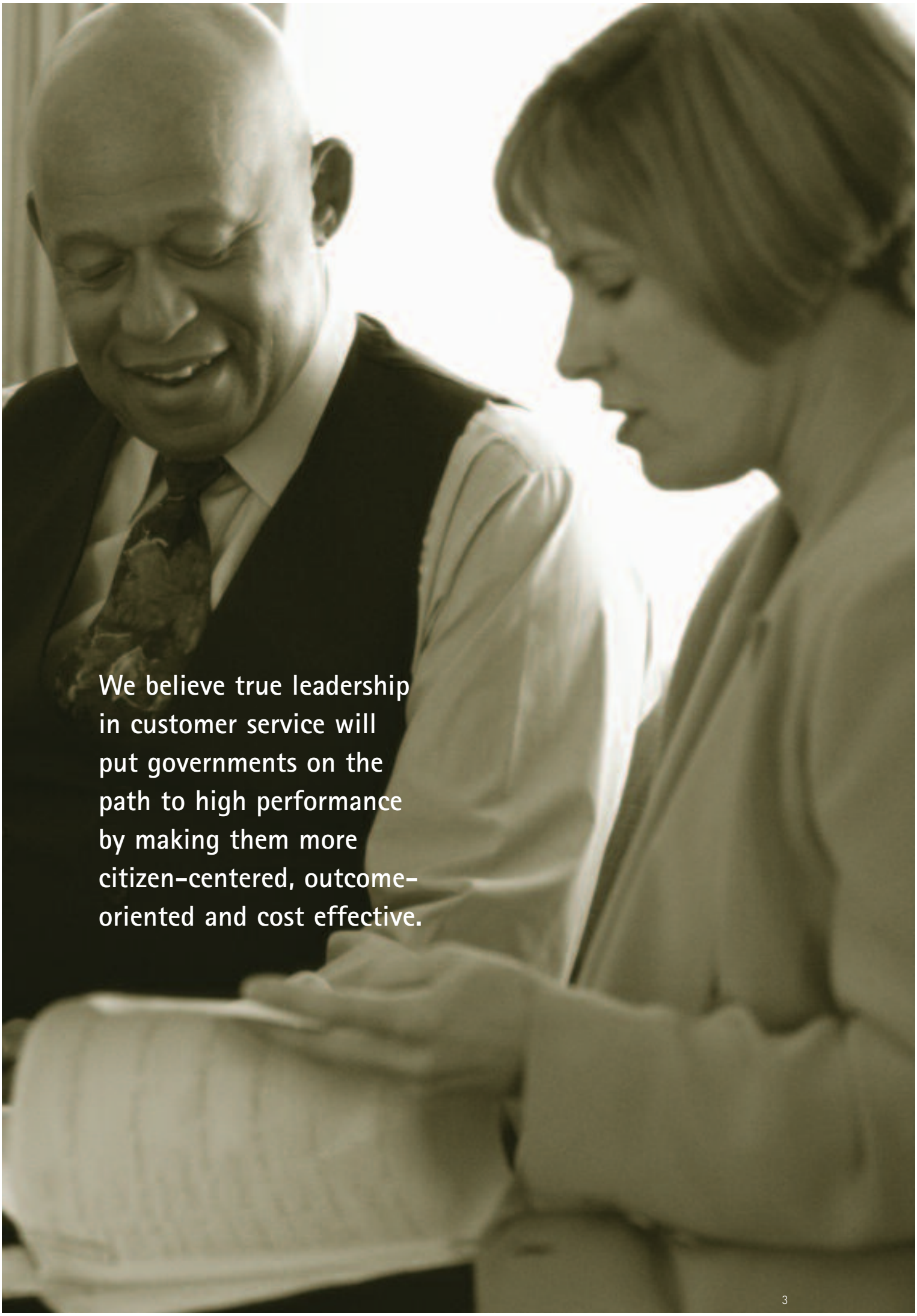
Our goal in this report is to help governments find their footing in a new arena, because we believe true leadership in customer service will put governments on the path to high performance by making them more citizen-centered, outcome-oriented and cost effective.

Governments will need to begin by gaining an understanding of what this new vision of leadership in customer service entails. Then, they will need to assess the actions they have taken to date within the different areas that make up the broader vision. In this regard our report is a valuable tool, as it analyzes each country's performance within each facet of leadership in customer service, quickly identifying individual strengths and weaknesses.

We also present a unique view from the citizen's perspective. Never before have we offered such a broad and deep picture of what citizens think about governments' service delivery performance. Taken together, the results of our maturity rankings and citizen survey form the basis of a detailed outline that will help countries progress along the path to a new vision of value—leadership in customer service—and, ultimately, high-performance government.

Martin Cole
Group Chief Executive—Government Operating Group

Vivienne Jupp
Managing Partner—Government Service Lines


We believe true leadership
in customer service will
put governments on the
path to high performance
by making them more
citizen-centered, outcome-
oriented and cost effective.

Executive summary

Government agencies face the seemingly contradictory imperatives to reduce the cost of customer service and compliance while at the same time improving service quality and delivering a more personalized experience. Over time, many have instituted reform initiatives that they hoped would address these imperatives, and ultimately, lead to high performance and the achievement of greater public-sector value—better outcomes at a better cost.[1] Among the most prominent of these initiatives has been the push for eGovernment.

For five years Accenture has produced an in-depth survey of the global eGovernment landscape—the trends, pitfalls and most innovative practices of governments around the globe with respect to online service. During that time, we have seen many governments subscribe to the premise that simply moving services online was in itself a "good thing," and that eGovernment would undoubtedly deliver benefits if adopted.

Today, that basic drive to put services online is approaching its limits; eGovernment should now be an integral part of government service delivery.

A key question is, How much measurable value have governments actually delivered by putting services online? Here, the answer is far from clear. While governments have certainly seen some value in terms of increases in citizen satisfaction and internal efficiency and some reductions in costs, none has been transformed by eGovernment alone. eGovernment simply has not led to the reinvention of service delivery.

Last year we saw that eGovernment advances were diminishing. Our annual rankings had begun to lose their meaning as we found that the pace of progress for the leaders had inevitably slowed to the point where other countries would catch up. We ourselves wondered, What comes next?

[1] Accenture has developed a model for measuring public-sector value to help government agencies analyze how they deliver value to citizens and how they can improve their performance to deliver increased value. For more information on the Accenture Public Sector Value Model, see Appendix A.

Clearly, the time for a new vision of government service delivery has arrived. Citizens today are more informed and have higher expectations of customer service than ever before. Many governments are responding to these pressures by investing in improving how they interact with citizens, businesses and other government agencies. They are adopting and implementing many of the service delivery and customer relationship management capabilities commonly found in leading-edge customer service organizations.

In our view, the importance of eGovernment as a topic worth study is in its role as a strong catalyst toward a new vision of leadership in customer service. This vision includes the ability to deliver services to citizens effectively and efficiently—in a manner that is tailored to their needs and circumstances, coordinated across the various channels of interaction (telephone, Internet, face-to-face, mail, short message system, etc.)—and, ultimately, to deliver timely and cost-effective results for the citizen, consistent with the government's policy objectives. Also inherent in this vision is effective and proactive communications, so citizens know about, access and maximize use of governments' optimized service offerings. We call this new vision "leadership in customer service."

This year's report, *Leadership in Customer Service: New Expectations, New Experiences*, aims to assess how governments currently fare in light of this new vision of leadership in customer service. Recognizing this transition, we have made major changes to our methodology and our measurement scheme. We have gone far beyond our traditional assessment of the breadth and maturity of online services to focus on the multiple facets of leadership in customer service: citizen-centered, multi-channel, cross-government services and proactive communications and education about government services. Our look at these aspects of service delivery is far more detailed and carries greater weight in our overall assessments of individual countries than ever before.

We have also built upon our popular global citizen survey, which we introduced last year. This year, we have augmented the scope to include all 22 countries covered in the report and to include a range of questions that go beyond simple online service delivery to citizens' attitudes and practices with regard to the broader vision of leadership in customer service.

What, then, are the new trends in government service delivery? Four key findings emerged, and we present them in the first section of our report.

First, eGovernment is well advanced and should now be an integral component of a much broader service delivery agenda. eGovernment is clearly a key component of this new vision we are advancing. However, it is only one piece of leadership in customer service. In this new scheme, some past leaders of eGovernment will find that their service delivery visions and strategies need to evolve beyond an eGovernment-only focus. In past reports, leading governments had been approaching the peak of what they could put online. This year, in the bigger picture of leadership in customer service, even the world leaders have clear room for improvement.

Our second finding is that future leadership will be defined by strength in all areas of customer service. Breakthrough initiatives that will move governments in this direction are starting to emerge. Beginning with their service delivery strategies, we see that a number of countries are broadening their customer service agenda in ways that will position them for future leadership. Governments are putting the foundations in place for multi-channel, interconnected government and they are starting to adopt many leading-edge customer service capabilities. The critical building blocks they need, but do not yet have, to move forward toward the next generation of service delivery are the main challenge confronting many of them.

Our third finding is that citizens' willingness to embrace a new generation of services outpaces governments' ability to deliver them. Citizens want more from government, in terms of cross-governmental collaboration and outreach. In fact, most are willing to make available a wide range of personal data

Executive summary

to receive better service. Despite this willingness, governments are not yet ready to match the citizens' enthusiasm with an ability to deliver. Almost without exception, the governments we surveyed are less than 50 percent of the way to a full realization of cross-governmental and citizen-centered service.

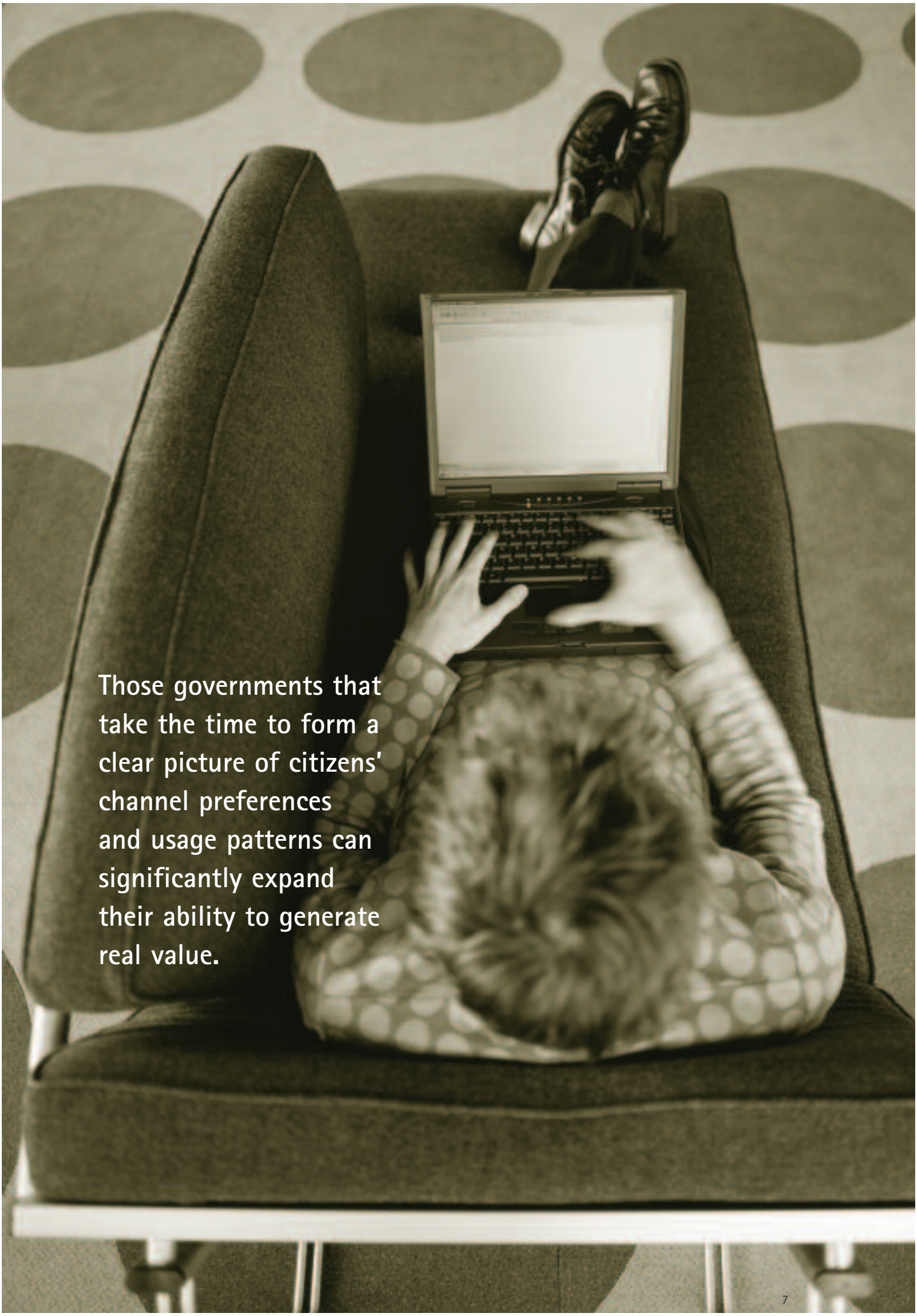
Our fourth finding is that governments are making service investment decisions without a clear view of the outcomes they effect. In our view, a fundamental measure of service delivery success is the actual adoption of services and how governments turn that adoption into value. We found, however, that governments' current measurements of service usage are haphazard. While some services are measured, others are not, or are measured inconsistently across agencies and departments. Those governments that take the time to form a clear picture of citizens' channel preferences and usage patterns can significantly expand their ability to generate real value. In this section, we also offer an Accenture model for measuring adoption, as a first step toward a meaningful assessment of where a particular government needs to focus its efforts to achieve its adoption objectives.

In section two of this report, The Citizens' View, we explore trends in how citizens communicate and interact with their governments, their experiences of cross-government collaboration and information sharing and the triggers and barriers to their future interactions with government. For true leadership in customer service, governments need a clear picture of citizens' attitudes and values with respect to the elements of service delivery that already exist and their government's plans for future enhancements. In this section, we provide the "sketch" for this picture—a starting point for understanding what matters to citizens in terms of service delivery.

Section three of this report is a new take on an old standby from our *eGovernment Leadership* reports—innovative practices. Whereas in the past we focused on innovative eGovernment practices across different industry types, this year we present a sampling of the most innovative practices that exhibit characteristics of the new vision of leadership in customer service. Each of these examples illustrates how leading governments are using new practices, processes and technology to deliver greater public-sector value from their service delivery efforts.

In section four of the report, we present our future vision of governments as leaders in service delivery. Despite the gains in eGovernment over the past five years, what we have not yet seen is true transformation of service delivery in the government sector. In this section, we imagine a government that is transformed to an extent where the current models of service delivery—and the processes, structures, governance and culture that go with it—are completely swept aside. We envision this future for government with the citizen at the center, and provide a provocative look at how this transformation might manifest itself in the human services, education, health care and revenue industries, with citizens and governments alike reaping the benefits. We also provide a brief action plan—our recommendations of what governments need to do to move toward true leadership in customer service—pulling together all of the elements that made up our research.

Finally, we conclude the report with individual overviews of the state of service delivery in each of the 22 governments we surveyed, drawing together our results and conclusions within the context of each country.



Those governments that take the time to form a clear picture of citizens' channel preferences and usage patterns can significantly expand their ability to generate real value.

Key findings

To set the context for our key findings, we first need to emphasize the role of our new vision of leadership in customer service, which will fuel the drive for high-performance government. It is against this new vision that we assessed countries' performances this year, and major changes to our approach have resulted. We have gone far beyond our traditional assessment of online services to focus on the multiple facets of leadership in customer service: citizen-centered, multi-channel, cross-government service and proactive communications and education about the services to the end recipient. Our look at these aspects of service delivery is far more detailed and carries greater weight in our overall assessments of individual countries than ever before.

Why have we made these changes? We believe the time has come for a major reinvention of government service delivery. eGovernment is well advanced in terms of the number of services online (although less advanced in terms of its widespread adoption by citizens) and should now be part of a much broader service delivery agenda to achieve its full potential. In response to pressures to deliver greater public-sector value—better policy outcomes and more targeted and effective citizen service delivered more cost-effectively—some governments have begun to change the ways they interact with citizens, businesses and each other. The examples are still isolated, but these governments have begun to take a new approach, making moves toward multi-channel-enabled services, fostering new levels of collaboration, sharing information where appropriate for seamlessly integrated service delivery—all with a view to transforming how the citizen is served. Government agencies taking these steps represent the vanguard of what we see as the new leadership in customer service.

Leadership in customer service: A new vision for government

Our vision for this new leadership in customer service puts citizens firmly at the center. The vision has four important elements:

- A citizen-centered perspective: A "citizens-first" point of view, in which all the necessary information is organized around the citizen. Government

Our methodology in brief

Our scoring this year consists of two components, each with a weighting of 50 percent. The first is service maturity, which measures the level to which a government has developed an online presence. Service maturity takes into account service breadth (the number of national services available online) and service depth (the level of completeness at which the service is offered (publish-, interact- or transact-level service).

The second component is customer service maturity, which measures the extent to which government agencies manage interactions with their customers (citizens and businesses) and deliver service in an integrated way. Our customer service maturity score considers how well governments have addressed the four dimensions of leadership in customer service: citizen-centered, multi-channel, cross-government service delivery and proactive communications about the services to the citizens and businesses that are the end recipients.

By combining these two elements of maturity into an overall maturity score, we were able to allocate a ranking to each of the 22 countries sampled. Countries whose overall maturity scores were within two percentage points of each other were allocated a joint ranking.

Because we have expanded our focus beyond the eGovernment-only aspects of governments' service programs to include the multiple facets of leadership in customer service across all channels, rankings have necessarily changed from years past.

See Appendix B for more detail on our 2005 methodology.

frontline agents providing the service have access to this information, and use it to tailor interactions to each citizen's needs and circumstances.
- Cohesive multi-channel service: Service that is fast, efficient and hassle free, regardless of the chosen channel, and in which interactions that involve more than one channel (for example, mail and telephone) are properly coordinated.
- Fluid cross-government service: Government agencies working together at the local, regional and national levels to provide integrated services to the citizen.
- Proactive communications and education: Active outreach and communication, which ensures citizens are well-informed about government services and provided with information and education designed to increase adoption of government services through appropriate channels, improve ease of use and strengthen citizens' ability to comply with what is expected of them.

Governments that embrace these four facets of leadership in customer service will be well on their way to delivering the outcomes their stakeholders desire and to achieving high performance through greater public-sector value.

This year's report, *Leadership in Customer Service: New Expectations, New Experiences*, aims to assess the current state of government service delivery against this new and expansive vision. Moving beyond eGovernment alone, our methodology has been altered significantly to investigate if (and how well) governments are answering the call for better service in each of the four critical areas described above (see sidebar, *Our methodology in brief*, above).

Four key findings emerged from our research:
- eGovernment is well advanced and should now be an integral component of a much broader service delivery agenda.
- Future leadership will be defined by strength in *all* areas of customer service.
- Citizens' willingness to embrace a new generation of services outpaces governments' ability to deliver them.
- Governments are making their service investment decisions without a clear view of the outcomes they effect.

The sections that follow expand on each of these major findings.

Key findings

eGovernment is well advanced and should now be an integral component of a much broader service delivery agenda.

This year's ranking, shown in Figure 1, reflects our view that eGovernment is only one (albeit important) component of citizen-focused, multi-channel, cross-government service that governments proactively communicate to the citizen.

Those who are familiar with Accenture's previous reports on eGovernment leadership may note with some surprise the way a number of countries scored in our 2005 rankings.[2] This year, we have deliberately chosen not to draw direct comparisons to rankings of past years; our methodology has changed too radically to make those comparisons meaningful or, in fact, valid. Even more important, we believe eGovernment as a separate program of change in and of itself is only one part of the bigger picture. As we described on page 5 of the Executive Summary, what will define the leaders of the future is a broader vision of value-led service delivery as an ingredient of high performance. eGovernment is surely one important component of that, as robust eGovernment offerings will be key to driving efficiencies through greater use of self-service for more routine transactions. However, it is only *one* piece of leadership in customer service that is marked by proactively communicated, citizen-centered, multi-channel, cross-government service.

[2] For a copy of our 2004 report, *eGovernment Leadership: High Performance, Maximum Value*, please see www.accenture.com/government.

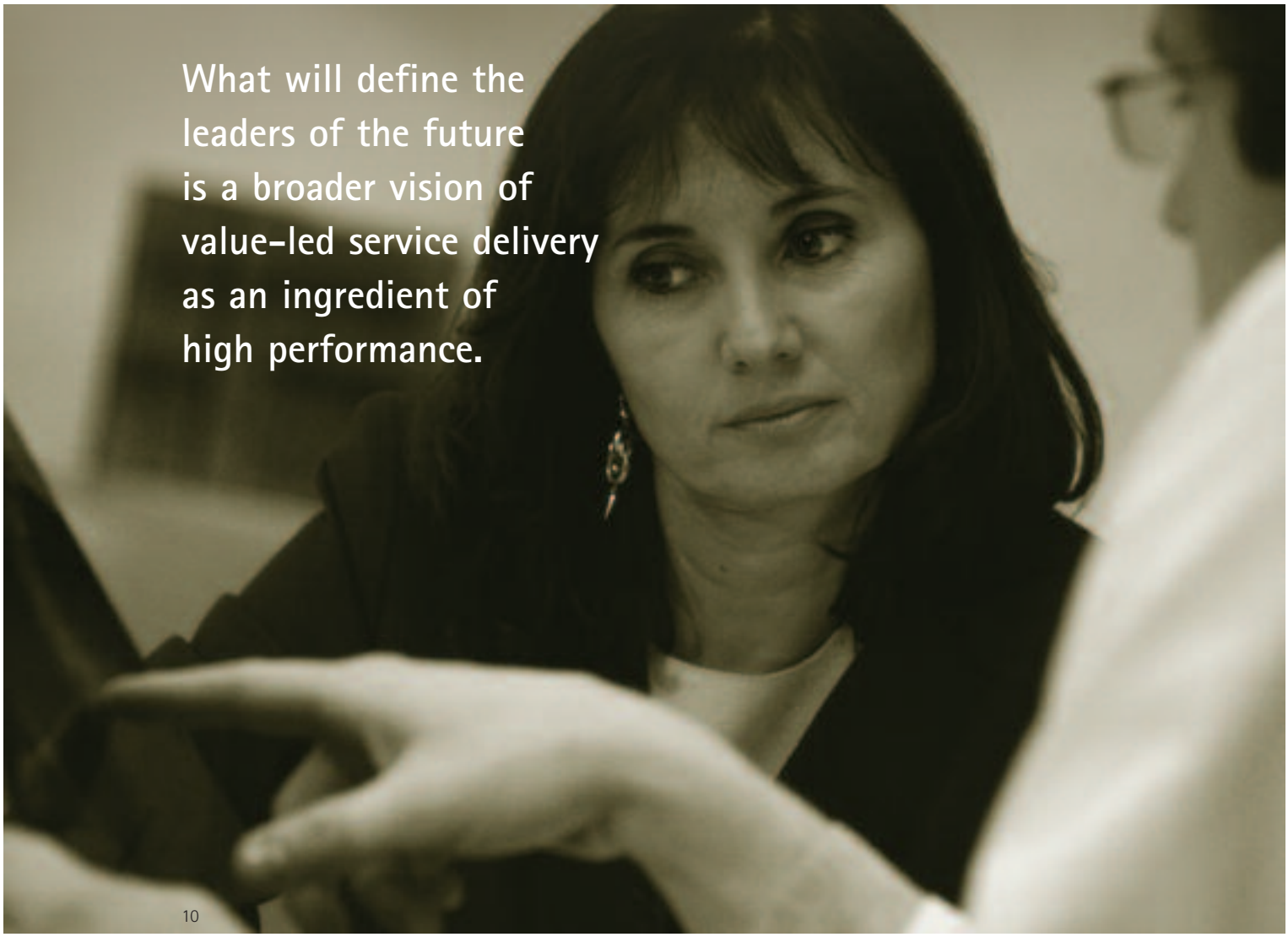
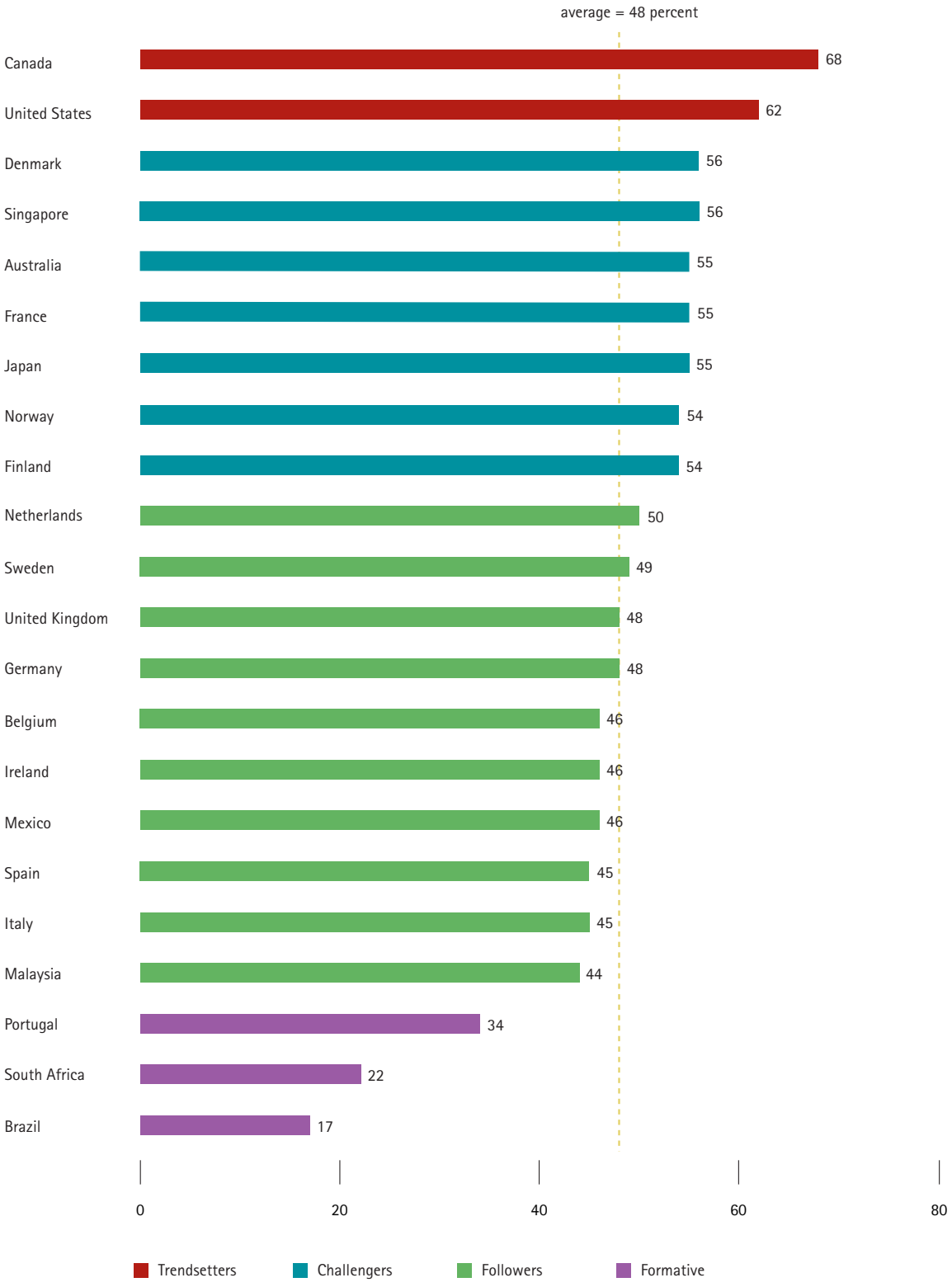


Figure 1: 2005 overall maturity scores



Canada is the leader in service delivery maturity, followed closely by the United States. Differences in scores of 2 percent or less generated joint rankings.

Key findings

In our rankings this year, all countries experienced a drop from past years' overall maturity scores, which were based solely on evaluations of countries' eGovernment programs. Leadership here does not necessarily mean superlative performance. Now, in the bigger picture, even the world leaders have clear room for improvement.

Those countries that fared worse this year tended to be those with an emphasis on solely the eGovernment aspects of their service delivery programs. A look at eGovernment programs across the globe shows that continued incremental improvements in this area are unlikely to yield significant boosts to maturity. To advance now, governments will need to focus on a much broader vision.

Consider the service breadth and depth elements of our study (see Figure 2). These two components focus on the online channel. Figure 2 shows that governments across the board are approaching the saturation point in terms of services they could put online in some form (although few have achieved widespread adoption of these services).

The overall average for service maturity breadth in 2005 is at 91 percent, and 20 out of the 22 countries we surveyed have at least 80 percent of the national services we measured online. The remaining two, South Africa and Brazil, have 77 and 60 percent of their services online, respectively, which—while showing room for improvement—are still respectable numbers. The top three leaders in this category—the United States, France and Japan—have at least 98 percent of their services online in some form.

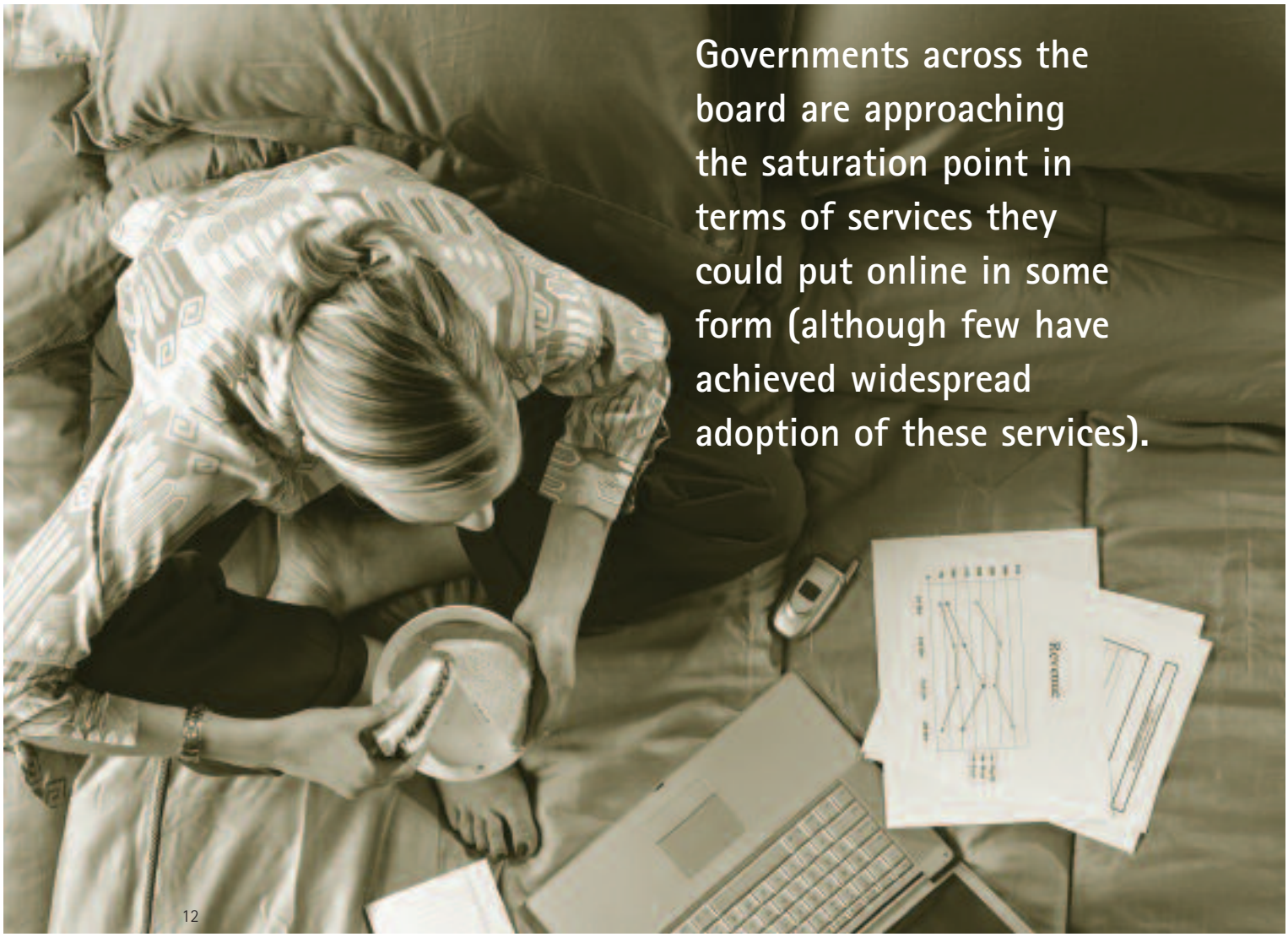
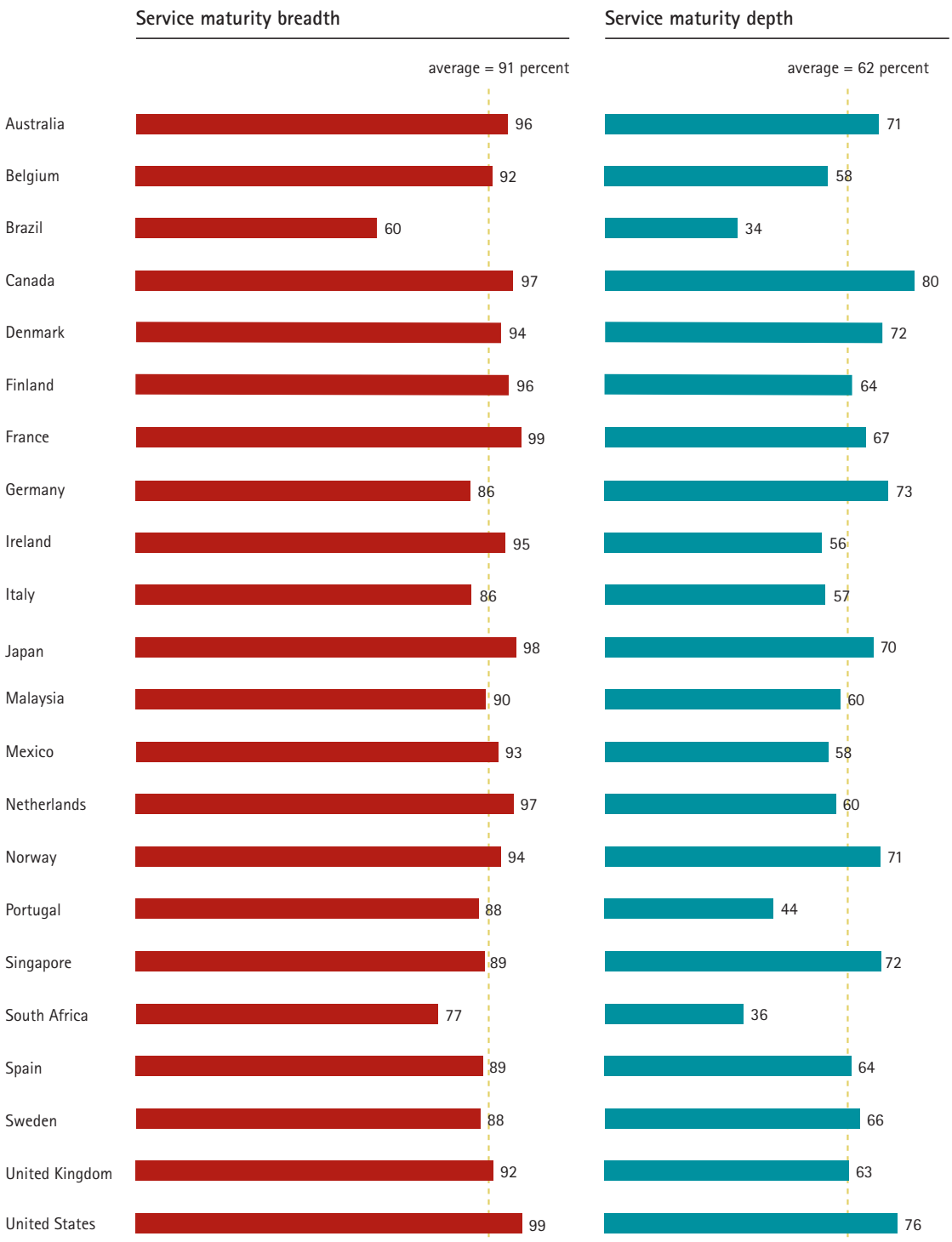


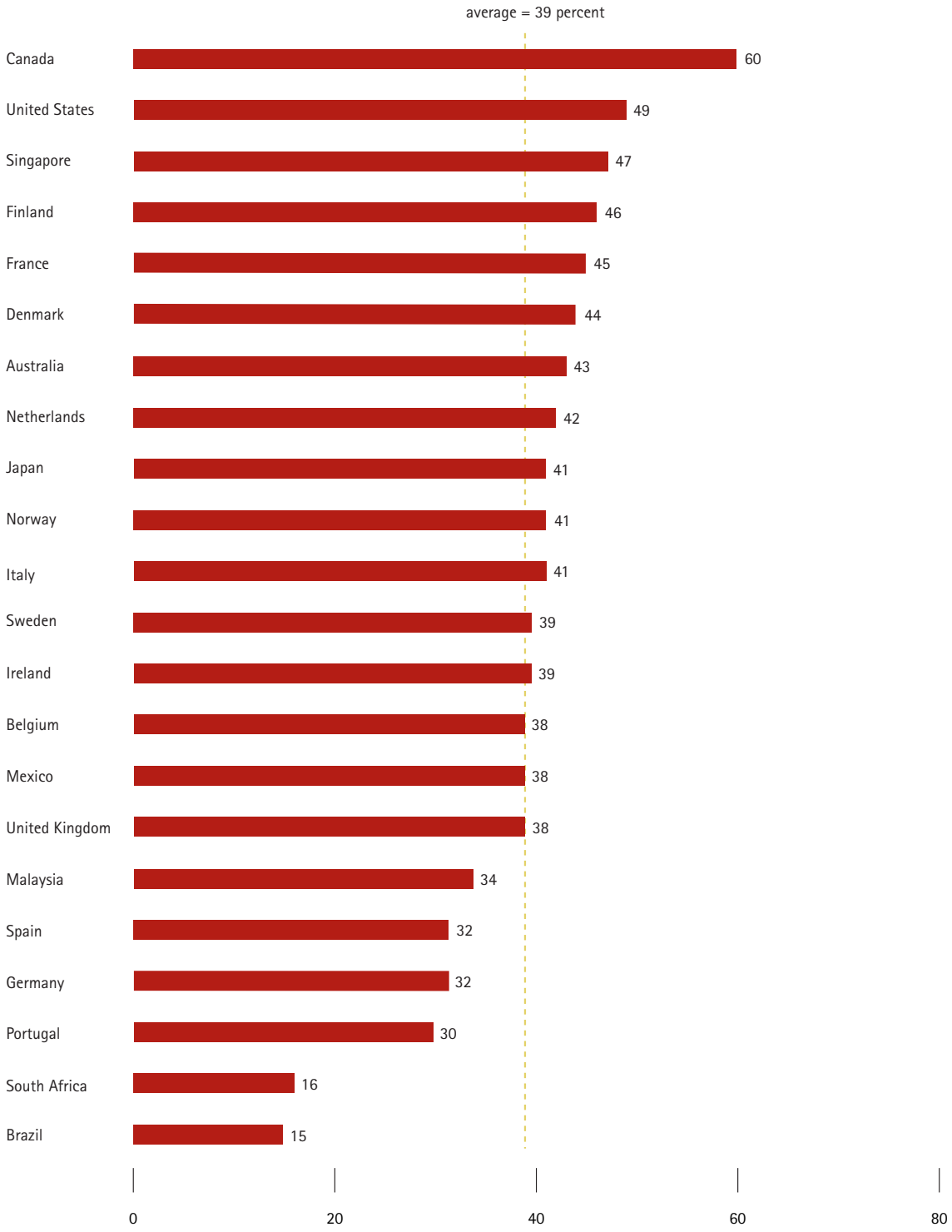
Figure 2: Service maturity breadth and depth



Almost without exception, the countries we examined have approached the limit in terms of the percentage of their services they could put online in some form. However, a number of countries could improve the sophistication, and value, of their online services.

Key findings

Figure 3: Overall customer service maturity



Customer service maturity was the most influential factor in how countries fared in our overall rankings this year.

The depth at which these services are provided presents a somewhat more interesting picture.

Service depth is measured by determining the level at which a user can conduct a particular online service with the government. For example, a country that merely published information on filing taxes would score worse in that service than a country that allowed a citizen actually to file the taxes and receive verification that the transaction had gone through.

Here, overall average service maturity depth is at 62 percent, which does point out room for improvement. Still, 19 out of the 22 countries scored 55 percent or higher, and the top three leaders in this category approached 80 percent depth.

The real story, however, is how countries fared in the customer service portion of our scoring methodology (see Figure 3). Customer service is where we moved our analysis beyond eGovernment alone and made our investigation more rigorous than ever before.

We examined the four facets of leadership in customer service (citizen-centered, multi-channel, cross-government and proactively communicated interactions) and expanded our scoring framework.

It is here where we see the new playing field. The broader vision we advance this year has reset countries in the journey toward high performance, and all, clearly, have room for improvement.

The overall average customer service maturity score in 2005 was a mere 39 percent. We expected, and found, this less-than-stellar showing, as we put countries through a more rigorous scrutiny of their practices beyond eGovernment than ever before. We also think this is a more accurate picture of the amount of improvement countries need to make in terms of delivering service that leads to outcomes that matter for their stakeholders.

Here, we see that only one country, Canada, has an overall customer service maturity score of more than 50 percent. The reason for individual countries' rankings became apparent to us when we drilled down deeper into the four facets of leadership in customer service. Future leadership undoubtedly will be defined by strength in *all* areas of customer service, and in the next section, we discuss individual countries' performances in these critical areas.

Key findings

Future leadership will be defined by strength in all areas of customer service.

Figure 4 shows how countries fared in each of the four areas of leadership in customer service that we measured.

While our overall maturity rankings indicate that no government has evolved to a full manifestation of leadership in customer service, we did see evidence of a number of new and ambitious initiatives that will go a long way toward transforming customer service in governments around the globe. Some breakthrough initiatives that will move governments in this direction already have emerged. Starting with their service delivery strategies, a number of countries this year are beginning to take a new approach that should position them well for future leadership in customer service.

As Figure 4 illustrates, overall leadership in customer service does not necessarily mean leadership within each dimension. For example, while the United States scored among the highest overall, its strengths are in cross-government service delivery and citizen-focused interactions. Its performance in proactive communications and education, however, where it was ranked 10th overall, shows it to be an area for potential growth.

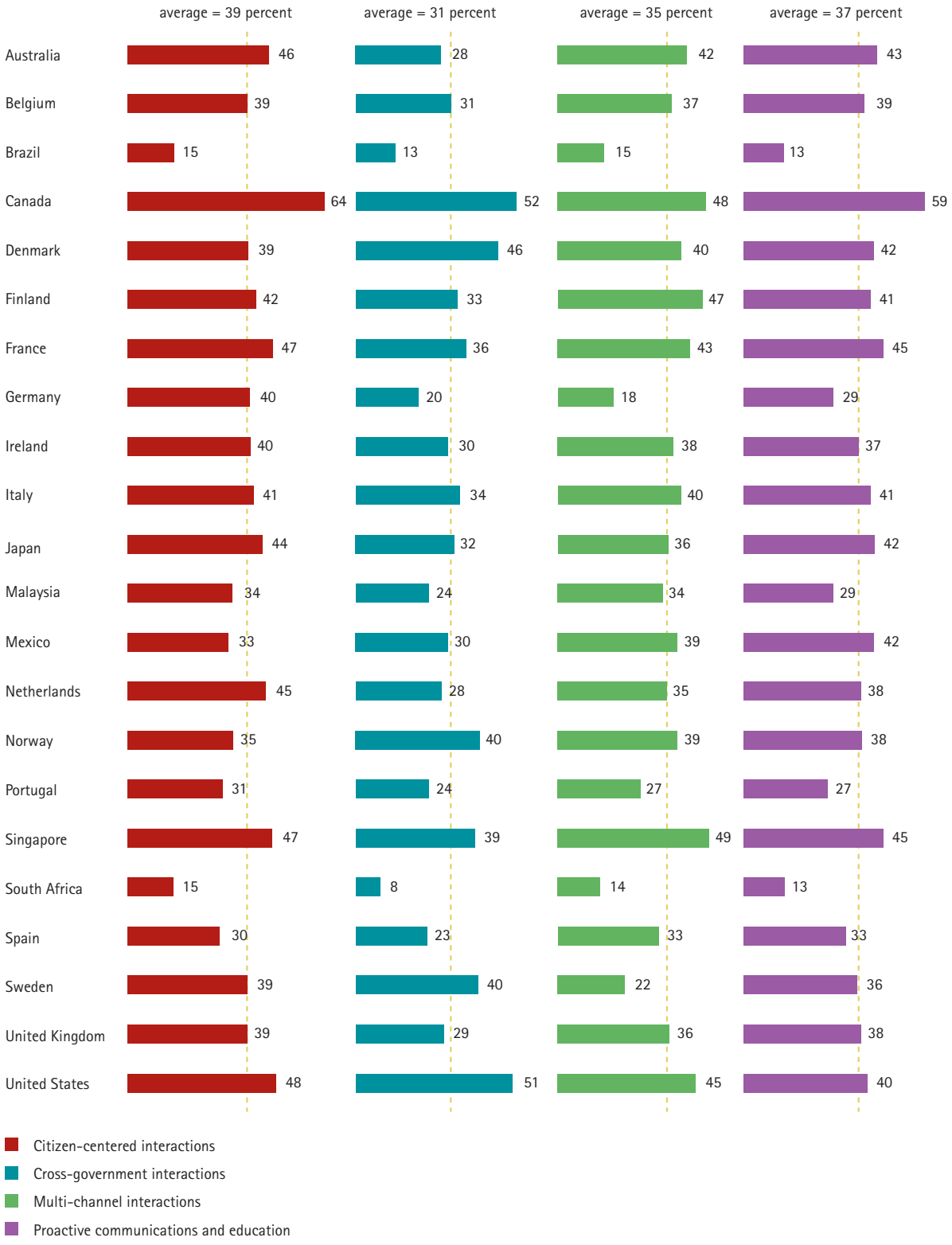
Canada ranked number one in three of the four facets of leadership in customer service (citizen-focused interactions, cross-government collaboration and proactive communications and education), reflecting the country's growing emphasis on a multi-dimensional approach in its broader program of service transformation. The Canadian government's years of world leadership in its Government On-Line program has led the country to the realization that taking the next step to service transformation implies a radical change in the way government as a whole is managed. Therefore, Canada has recently articulated a service vision to redesign services, service delivery and the public service itself to achieve dramatic improvements in client satisfaction, cost savings and efficiencies, policy outcomes and accountability, and transparency. The vision specifically mentions achieving outcomes within a framework defined by citizens' needs and a whole-of-government approach. Now it remains to be seen whether Canada will rise to the challenge of implementing this ambitious vision quickly.

Canada also expends significant effort in informing and educating citizens about its innovative offerings. For example, the federal government has centralized advertising budgets to develop targeted campaigns around themes, such as its "Go smoke-free!" campaign, in which advertisements drive people to Health Canada's Go Smokefree site. The site provides a wealth of tools to support people in quitting smoking, including an "e-Quit" program of daily e-mailed messages of support and information throughout the entire quitting process. In another example, the Canada Business Service Centers (CBSCs), Canada's gateway to government information for business, market and promote multi-channel services through a "click-call-visit" approach. Citizens can click on the website and visit for information or call for advice and specific assistance. There are activities to move people to the Web through the "talk-to-us" hybrid channel, where people can connect with an information officer online. Marketing and promotion of the CBSCs are done at the regional and local levels through trade show visits, outreach seminars and community partners' promotions. Examples such as these help explain Canada's strong showing in the proactive communications area of our scoring.

France also scored highly across categories in relation to other countries. In 2004, the French prime minister communicated the government's intentions to place the citizen at the center of state reform. During the past year, there has been some early progress to offer multi-channel and citizen-centered services to businesses and citizens. Initiatives such as Allô, Service Public, which makes it possible for any citizen to obtain a response to any administrative request for information in less than three minutes, and My Service-Public, which provides personalized administrative service, likely provided a boost to the country's rankings in the areas of citizen-centered and multi-channel service.

Sweden, a leader in cross-government collaboration, places particular emphasis on having a network of agencies that cooperate to serve the citizen. A central idea of the Swedish vision is that citizens and businesses should not have to contact more than one

Figure 4: The four elements of customer service maturity



A closer look at the four dimensions of customer relationship management maturity points out clear strengths and areas for improvement for individual countries.

Key findings

agency with any issue. Accordingly, much effort has been spent on facilitating cooperation among agencies. For example, the "Infra Services" general agreement was created to provide agencies with an alternative to the costly effort of building their own online services and to facilitate the use of common standards across agencies. On an agency level, there are numerous examples of cross-government services. Among the most striking of these is a service that allows a citizen who wants to register a company to access and file any documents necessary on a special website, accessible from both the Tax Board's and the Companies Registration Office's websites.

Likewise, Denmark, another leader in cross-government collaboration, is moving toward a client-centered, cross-government approach to service delivery, with the government creating special crosscutting bodies to implement its new strategy. High priority is given to promoting cooperation among various government authorities across all levels of government, with a number of authorities working together to create collaborative online services that are responsive to the needs of individuals and businesses. For example, the body with primary responsibility for the general development of the eGovernment program, the Board of eGovernment, is a multi-jurisdictional committee with representatives from the Danish Government, Danish Regions, Local Government Denmark (KL), Copenhagen Municipality and Frederiksberg Municipality.

In terms of multi-channel service delivery, Singapore ranked number one. While the Singaporean government's position is to push for electronic means as the preferred channel as far as possible, a multi-channel approach is adopted to deliver government services depending on customer segments. Mobile phone technologies such as short message service (SMS) continue to play a growing part in the delivery of electronic services, and the government has plans to establish a single SMS number format for access to all of the government's mobile phone services. To promote use of its online channels, there is a concerted effort among all agencies to help the public transition from in-person services by installing self-service terminals within agency offices, with staff available to guide and assist customers. Finland is another leader in this category, and we saw a number of innovative developments with regard to multi-channel offerings in this country. For example, the Population Register Centre and TeliaSonera Finland recently launched the State Citizen Certificate to enable secure mobile communications and commerce. This certificate is now included in a mobile phone's SIM card and can be used to identify the user with one code for both public- and private-sector electronic services.

We believe a number of countries will be worth watching over the next few years. For example, Mexico, which had slowly but steadily been making progress in our eGovernment rankings in past years, ranked among the top 10 in two out of the four customer service areas we measured: multi-channel interactions and proactive communications. The country's eGovernment office is working to implement and coordinate e-services kiosks to improve adoption of the online services provided by the federal, state and local governments. Its award-winning citizen portal provides a single access point to all levels of government services, focused on the needs of citizens, where the roles of individual agencies are invisible.

Germany scored in the bottom half of the rankings in cross-government collaboration. However, the country is taking an interesting approach to fostering future cross-governmental collaboration, which may provide a real boost in this area in the future. The country's "Einige für Alle" (Some for All) strategy is being set up as a model of cooperation among different layers of government and for cooperation on a pan-European Union level as well. The government has selected a number of services to be developed across the country by lead units (either federal ministries, länder governments or municipalities). These units will have ownership over the development of particular services and will roll these services out to the different layers of government as they are developed. In this model, the entire country will be able to capitalize on the fruits of many focused efforts.

Clearly, governments are putting the foundations in place for multi-channel, inter-connected government and they are starting to adopt many of the customer relationship management capabilities more commonly seen in world-class customer service organizations. Yet despite some initial advances toward leadership in customer service, most governments still have a long way to go toward realizing truly value-led service.

Clearly, governments are putting the foundations in place for multi-channel, inter-connected government and they are starting to adopt many of the customer relationship management capabilities more commonly seen in world-class customer service organizations.

Key findings

The initial challenges confronting many governments are the critical building blocks they need, but do not yet have, to move forward toward the next generation of service delivery. These vary from country to country, but may include security, legislation, governance mechanisms and citizen perceptions. However, we also see some countries taking innovative approaches to overcome these obstacles. In Denmark, for example, the government established a Secretariat for the Modernization of Law to identify and remove all unnecessary barriers for digital communication and to facilitate and enable cross-government services. In the United States, the federal government introduced its first mandatory identification standards for drivers' licenses, birth certificates and other forms of state-issued identification. If a state does not begin issuing identification to meet the standards within two years, federal agencies will not be allowed to accept the documents as valid identification.

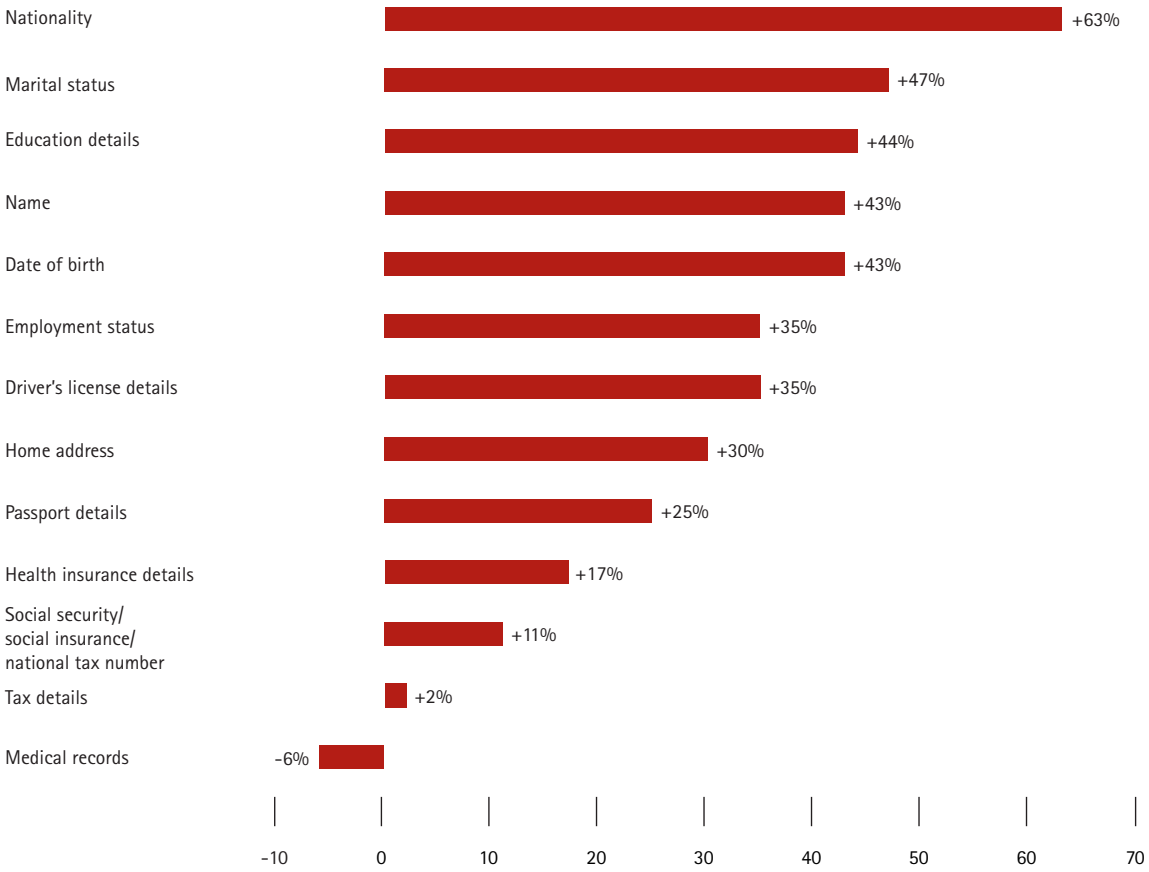
A new face of government is emerging, but the evolutionary process will undoubtedly continue to be a different journey for different countries. The fact that governments approach these challenges in differing ways means that countries will not evolve at the same rate or with the same focus. Rather, the next generation of government service delivery will depend largely on each country taking into account its current position in the evolutionary process, what it wants to achieve and what its citizens actually require. In the next section, we look at perhaps the most important variable in leadership in customer service, the attitudes and culture that influence public-sector service delivery and, hence, high performance.

Citizens' willingness to embrace a new generation of services outpaces governments' ability to deliver them.

As consumers, citizens tend to use their best service experiences as their basis of comparison. They expect service excellence from all of their interactions (private and public sector alike) and are currently being left less than satisfied in their dealings with government. Citizens want better service from their governments, and in fact we found evidence that they are prepared to offer more in return.

Our citizen survey showed that with few exceptions, citizens are amenable to allowing government to have access to and share a whole range of information, from nationality down to health insurance details and, to a lesser extent, social security numbers and tax information (see Figure 5).

Figure 5: Comfort with government departments sharing information (average net comfortable*)

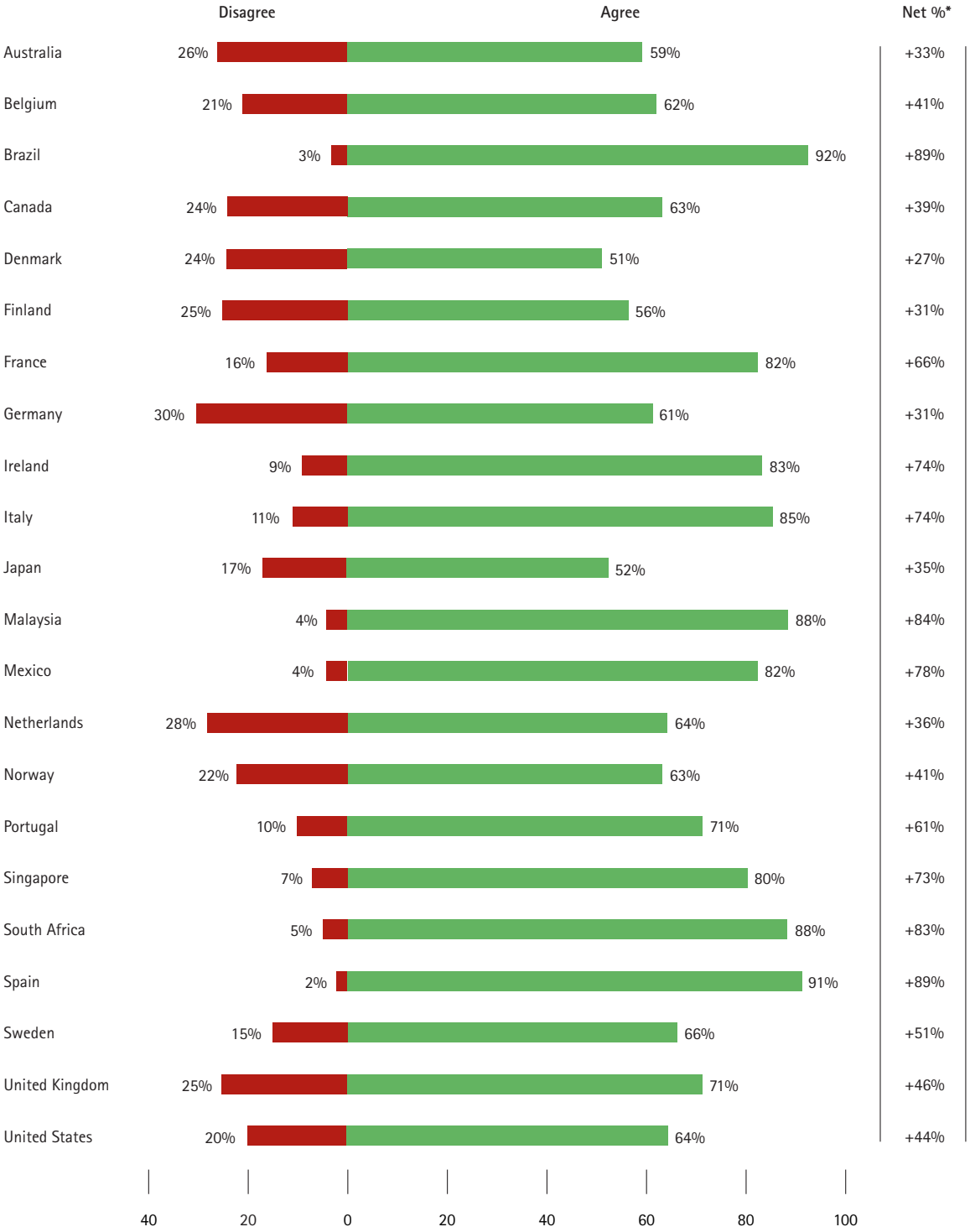


* "Net comfortable" numbers were derived by subtracting the percentage of those who said they were uncomfortable with sharing information from the percentage of those who said they had at least some level of comfort with sharing such information.

On the whole, citizens are fairly comfortable with governments sharing a wide range of their personal information, if it would lead to better service for them.

Key findings

Figure 6: Government should conduct public education and promotional campaigns encouraging people to access government services online



* Net percentage was derived by subtracting the percentage of those who disagreed with the statement from those who agreed with it in each country.

Citizens are eager to have government promote its services and offer education to improve citizens' access to those services.

Likewise, citizens are highly enthusiastic about government being more proactive; again, with few exceptions citizens overwhelmingly want government to conduct public educational and promotional campaigns to encourage greater usage of their multi-channel offerings. They are receptive to more information from the government and to being offered incentives to encourage adoption, as long as these promotional efforts are inclusive of all members of society (see Figure 6).

Yet, while citizens are willing to share personal information with their government if it means value-added services for them, and while they are eager for government to educate them and promote those services, we found a sharp contrast between this enthusiasm and the extent to which governments are taking citizens up on their offer. For example, our citizen survey showed that an average of only 24 percent of citizens across all countries reported the government remembering all details of their previous interactions. The gap between citizens' expectations and governments' delivery is further evidenced by the relatively low scores we saw in all areas of our customer service maturity scoring.

In all customer service maturity areas, we found the average maturity across all countries to be significantly below the 50 percent mark. That means that on average, countries are not even halfway to fully delivering the components of leadership in customer service that citizens clearly value.

As we described in our second key finding, governments have begun to take steps toward improving service within a broader framework than eGovernment alone. These steps will be valuable, but will not be the complete solution. No doubt, the challenges governments face in improving service to match citizen expectations go beyond organizational or infrastructural changes alone. Even with all of the pieces in place, there will still be some barriers to address in terms of public attitudes and acceptance of particular service offerings.

For example, in Sweden, the issue of a governmental push toward any particular channel is viewed as sensitive. This sensitivity may be a repercussion of moves the private sector has made; Swedish banks have been heavily criticized for steering customers toward using their online services by imposing steep price increases on other service channels. The government must make certain that any policy in this regard ensures that every citizen gets the same service level (irrespective of where they live or their abilities, for example).

Japan is a good example of the types of challenges governments will face in bridging gaps between service expectations and what is offered—and the limitations of the "build it and they will come" philosophy. That country scored highly in a number of aspects of our study this year: service maturity breadth, citizen-centered interactions and proactive communications. Yet, when we looked at the Japanese citizens' perspective, the gap loomed large. The country scored among the lowest in terms of citizens' attitudes toward how well their government is developing its eGovernment program; how effective government services and departments are at working together; and how comfortable citizens are with governments sharing their personal information for better service. Determining the precise causes of the gap will be critical—not just for Japan, but for all countries. Otherwise, future investments in the wrong areas will get governments no closer to the outcomes citizens value. The next section discusses this adoption issue in more detail and proposes a model for analyzing citizens' drivers of adoption and selecting the appropriate strategies for improvement.

Governments are making their service investment decisions without a clear view of the outcomes they effect.

Our experience has shown us that to achieve greater value for their stakeholders and achieve high performance, the decisions governments make must lead to greater achievement of policy outcomes and results that citizens and businesses think are worthwhile. From a leadership in customer service perspective, that translates into understanding, measuring and influencing service adoption for the optimal mix of delivery across channels and, ultimately, for overall better service and the greatest

Key findings

return on investment. To start down this path, governments need a comprehensive view of citizens' and businesses' preferences and of their adoption of all channels. Consequently, governments that do not take steps to form this picture limit their ability to understand how to generate real value.

One way of building this understanding is by determining what services people use, and why, through disciplined measurement of adoption. From our survey and from what citizens themselves say, we see that governments' understanding of citizens' preferences and practices is not as good as it could be. For example, we set out to collect adoption data across the 22 countries in our survey for six selected citizen and business services.[3] What we found was that governments' current measurements of service usage are haphazard and inconsistent across agencies and departments.

Our findings demonstrate that adoption data either is not measured or is not readily available to the public. While we found some evidence of measurement in countries such as Sweden, Singapore and the United Kingdom, our research suggests that governments are not yet applying a consistent government-wide approach to measuring the value of *all* the services in their program. While some services are measured (most often, online personal income tax filing), others are not measured or are measured inconsistently.

There are many pragmatic reasons why governments struggle with these measurements. For some, the problem is how online services have been developed over time. Development has been spread across agencies, resulting in inconsistency in how data is tracked. Other governments simply lack the experience with benchmarking needed to make meaningful assessments of adoption and then of value.

Whatever the reason, governments should take steps to remedy the situation. Once governments have this critical information, they can begin to apply the appropriate strategies for promoting the optimal delivery strategy. They can also begin to report on the efficiency savings derived from lower-cost channels and develop greater accountability. Accenture has developed a model that can be used to determine where citizens are in the adoption curve for a particular service and where a government needs to focus its efforts to achieve its adoption objectives. (See sidebar, *The Accenture Adoption Pyramid*, on page 25.)

For example, for high-adoption audiences, governments might mandate the usage of certain channels for some services. A number of countries have taken this route for individual services: In the Netherlands, filing tax forms electronically became obligatory for businesses from January 2005 onward. Likewise, the U.S. Internal Revenue Service recently announced that it will require certain large corporations and tax-exempt organizations to file their income taxes electronically, beginning in 2006. In France, applications for higher education grants have to be made online.

Where a mandated model is not appropriate, either because of low Internet penetration, decided citizen preference for other channels or strong pushback, for example, governments can use other techniques. The Singaporean government is partnering with private firms to drive up adoption of online services. Fuji Film assists customers in applying for or renewing their passports online with the Immigration and Checkpoints Authority after taking their digital photos. Also in Singapore, maid agencies assist with the online application for work permits for foreign workers. Governments also can introduce new, low cost and convenient channels where those are the drivers for their customer groups. Norway and Sweden, for example, which both have pay-as-you-earn taxation models, have introduced SMS as a way of completing the tax filing process for citizens in certain circumstances. Citizens in those countries now have a choice of three different electronic channels for confirming tax data received from the government.

Using analytical modeling, a government can determine the drivers at different levels of the pyramid, from awareness to advocacy, and begin to take the appropriate action. For example:

- **Awareness**—If users have little or no awareness of the service, the government may not be doing enough marketing or may be doing the wrong kind of outreach and communication.

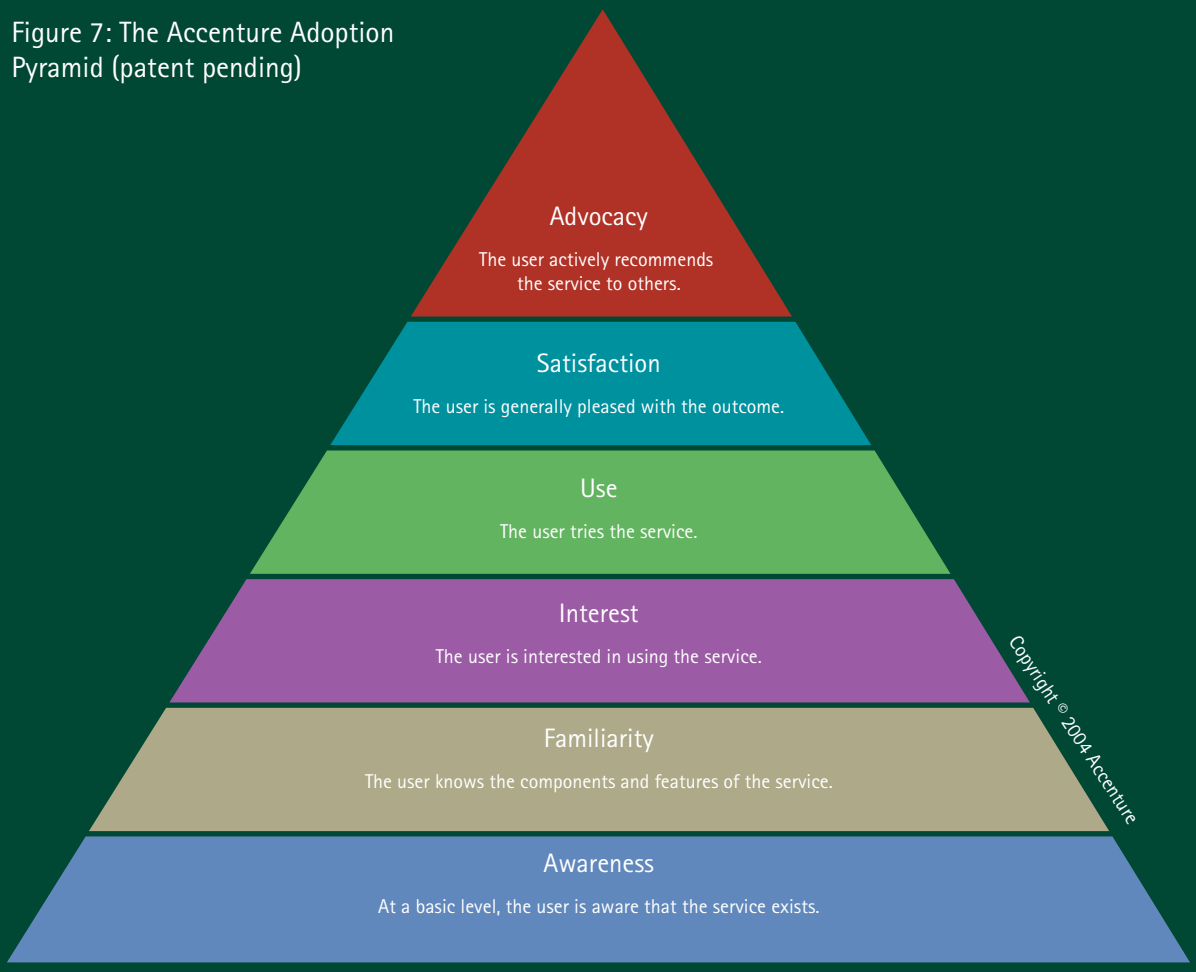
[3] The services we assessed were: filing personal national income taxes, filing business income tax forms, filing for incorporation, applying for a civil service job, applying for educational loans and financial aid and applying for a passport. To collect this data, Accenture researchers relied on secondary research (information in the public domain) and contacted relevant agencies in some cases.

The Accenture Adoption Pyramid

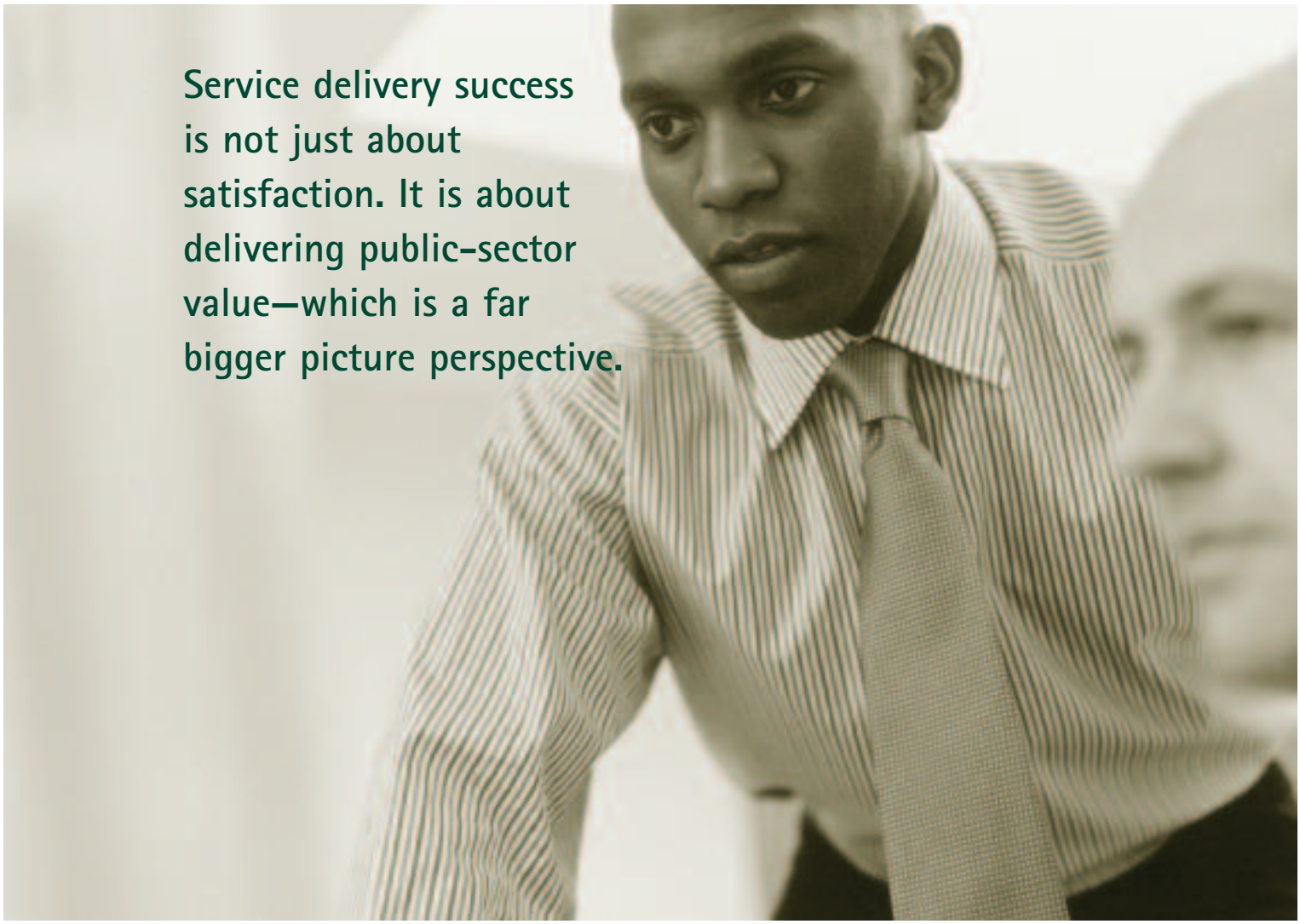
Governments face two pitfalls in the way they typically have developed and delivered services. First, they have built and bundled services based on what they think citizens and businesses want, typically without actually asking them what they value or need. Second, when governments measure services, they tend to focus on one component—satisfaction—a measurement that fails to address the spectrum of issues (from basic access to the nature of the service offering itself) that might be limiting the delivery of value to potential users. The approach many governments have taken to date fails to address the fundamental aspects of creating public-sector value. In other words, governments are not necessarily providing citizens with the right services that address their sources of value. Nor are they defining success broadly as delivering an impactful citizen experience: from awareness of services, use and/or compliance and, ultimately, the willingness to advocate the services to others.

Accenture has developed a patent-pending analytical technique that makes use of existing data and/or primary research to help governments better understand where they need to make improvement in the customer experience to drive the creation of value and, ultimately, high performance. This technique is referred to as pyramid analysis. While pyramid analysis is not unique to Accenture, our approach emphasizes tailoring the analysis through a data-driven exercise. It is a technique that we have used with multiple clients internationally with good results. In pyramid analysis, the tiers represent levels of familiarity with a particular service. While the number of tiers of the pyramid can be adjusted for a specific situation, the model describes six basic levels, illustrated in Figure 7.

Figure 7: The Accenture Adoption Pyramid (patent pending)



The Accenture Adoption Pyramid (patent pending) helps governments better understand where they need to make improvement in the customer experience to drive the creation of value.



Service delivery success is not just about satisfaction. It is about delivering public-sector value—which is a far bigger picture perspective.

- **Familiarity**—If users have little or no familiarity with the service, greater focus on targeted messages that have relevance to a particular audience may be needed.
- **Interest**—If users have familiarity with the service, but no interest in using it, the government may not have the right value proposition. It may need to revisit what citizens value and the ultimate objectives of offering the service.
- **Use**—If the users have interest in using the service, but have not yet done so, the government should examine and take steps to remove the barriers—access or legislation, for example.
- **Satisfaction**—If users have used the service but were not satisfied with it, the quality of service needs to be examined; this could be a customer service or a technology integration issue.
- **Advocacy**—Advocacy is the pinnacle of the adoption pyramid, where a user would willingly use the service again and tell others about it. Getting to this level of the pyramid implies providing a level and quality of citizen service that leaves users feeling not only satisfied, but also willing to put their reputation behind recommending the service to others.

Coupled with the pyramid analysis is conversion analysis, which helps governments understand how to migrate the citizen upward to the advocacy tier. In Accenture's approach, we examine the drivers of conversion at the critical problem points identified by the conversion analysis. In this way we identify high-leverage opportunities and solutions.

Governments often lack the right data and the ability to interpret it in a meaningful way to drive the right actions. Their failure to look at service delivery in a way that emphasizes first getting the services right and then promoting their adoption means they often are making investments haphazardly, with a random chance of a successful return. In contrast, this pyramid approach bases investments and priorities on fact. It is a highly effective model, as service delivery success is not just about satisfaction. It is about delivering public-sector value—which is a far bigger picture perspective.

The citizens' view

Leadership in customer service

Our new vision of value in government service delivery puts citizens squarely at the center of governments' future modes of operation as high-performance governments. For true leadership in customer service, governments will need to organize in a fashion that provides for integrated and seamless citizen interactions, and some governments have already begun to take steps in this direction.

Before the actual actions they take and the specific programs they implement, however, there is an equally important first step to realizing leadership in customer service. Governments need a clear picture of citizens' attitudes and values with respect to the elements of service delivery that already exist and the government's plans for future enhancements. Understanding their customers and meeting their preferences will be key.

In this section, we provide the "sketch" for this picture—a starting point for understanding what matters to citizens in terms of service delivery. Last year we included for the first time a survey of citizens' attitudes, perceptions, needs and desires with relation to eGovernment alone in a small subset of 12 countries. This year we have included in our report the results of our survey of citizens' attitudes and practices across all 22 countries covered in our primary research, with a broader focus on the multiple dimensions of leadership in customer service.

We concentrated our efforts on three areas:

- **Citizen interactions**—How citizens currently communicate with government, their preferred methods of contact and their current levels of interaction with government services.
- **Cross-government interactions and information sharing**—Citizens' experiences with different government organizations acting as one and their attitudes toward having personal information shared across government.
- **Triggers and barriers to future interactions**—Citizens' perceptions about new delivery channels, their support for initiatives to encourage the use of online service and their overall attitudes toward eGovernment in particular. (See Appendix B, page 104, for a full description of the citizen survey methodology.)

Our findings within each of these areas of research are explained in greater depth in the sections that follow.

The citizens' view

Citizen interactions

To set the stage for the remainder of this section: We grouped governments into three categories, to get a feel for their relative technological advancement and the Internet-sophistication of their population. Countries were grouped according to the Internet penetration of the country versus the percent of the population that had ever used eGovernment. Countries were then classified as either emerging (low Internet penetration, low current eGovernment use), developing (medium Internet penetration, medium eGovernment use) or advanced (high Internet penetration, high eGovernment use). We found a direct correlation between the two figures: the higher the Internet penetration, the higher the incidence of eGovernment usage. Figure 8 shows how countries were grouped within this scheme.

Within this categorization scheme, perhaps the most striking finding is that despite the relative Internet savvy and familiarity with online government in advanced countries, the telephone continues to be the predominant means citizens use to communicate with government. Over the past 12 months, 63 percent of respondents in these countries had used the telephone to interact with government, as opposed to only 31 percent who had used the Internet.
Even in countries such as Norway, Sweden and the Netherlands, where the citizens have great familiarity with the online channel, telephone contact outpaced Internet contact at a rate of almost two to one. The disparity is even greater in developing countries, where 60 percent had used the telephone for government contact as opposed to just 18 percent who had used the Internet, and in emerging countries, where 67 percent had used in-person interactions and only 11 percent had used the online channel.

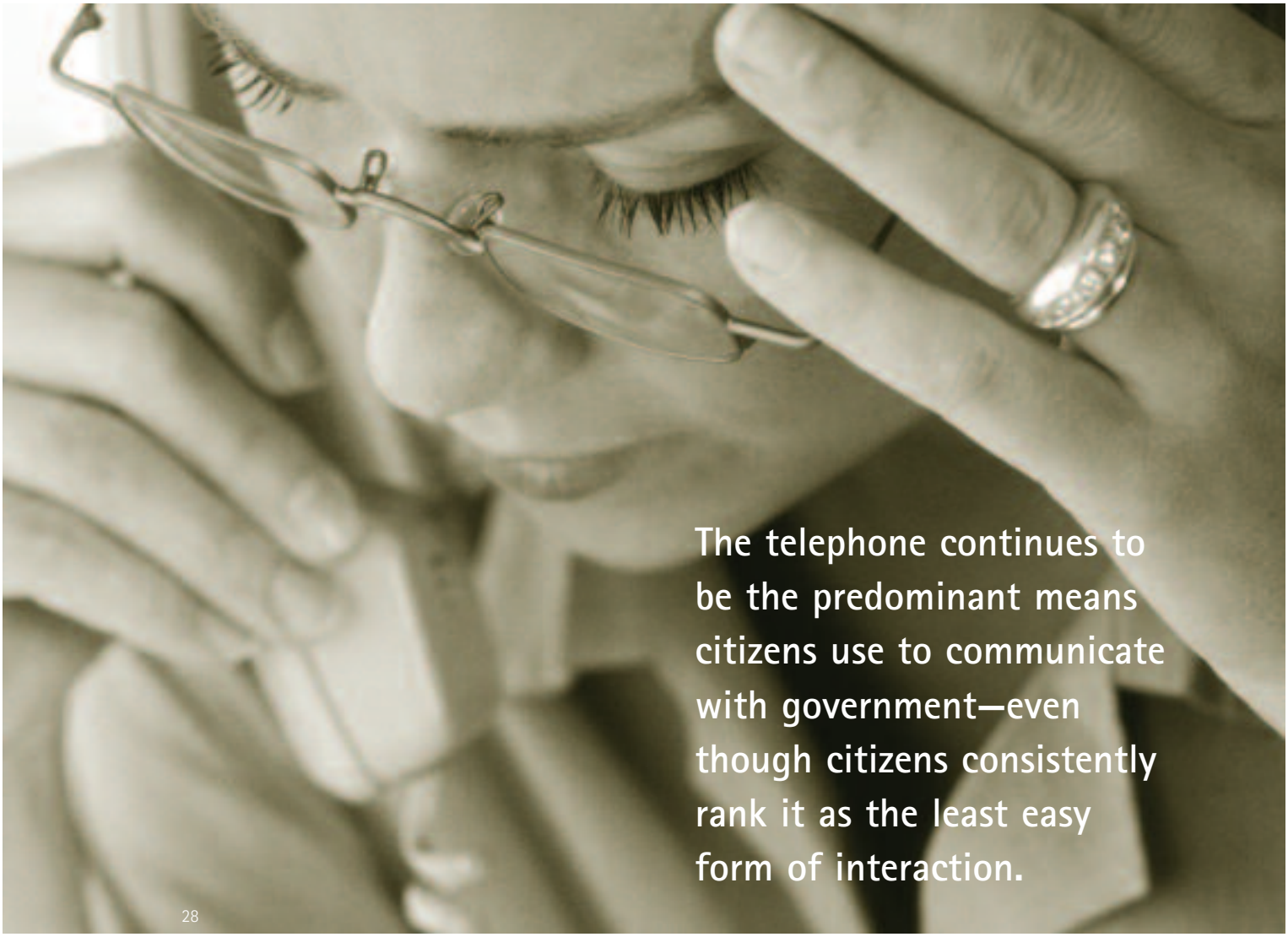
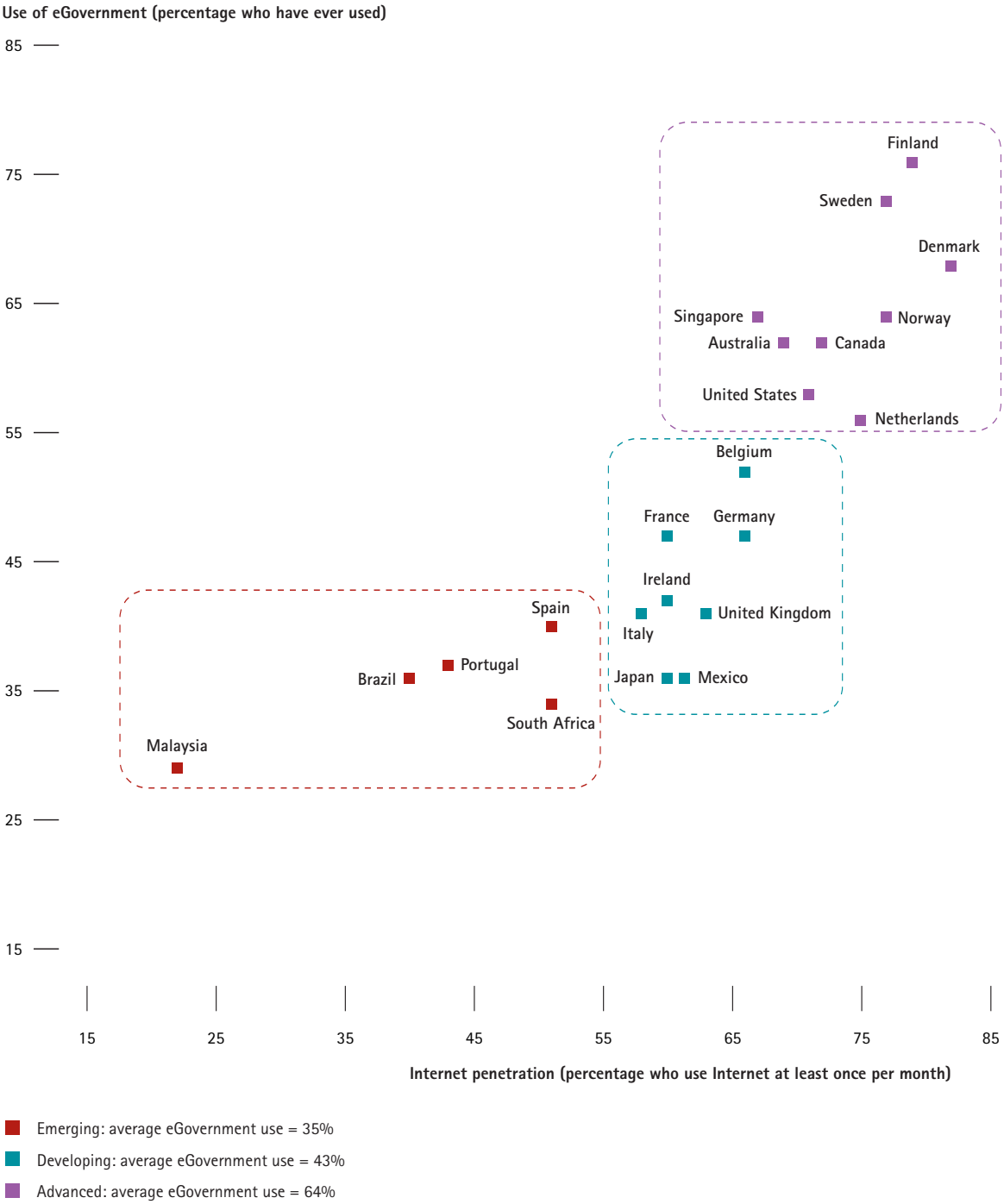


Figure 8: Internet penetration versus eGovernment usage*



Emerging: average eGovernment use = 35%

Developing: average eGovernment use = 43%

Advanced: average eGovernment use = 64%

* See Appendix B, page 104, for a fulll description of the citizen survey methodology.

We classified countries into three categories—emerging, developing or advanced—depending on their Internet penetration versus the percentage of the population that had ever used eGovernment.

The citizens' view

Interestingly, telephone interaction increases in line with eGovernment development, so that even as a country becomes more familiar with eGovernment and the Internet in general, the citizens' use of the telephone as a contact method also increases. Cultural drivers and preferences also seem to play a strong role. Accordingly, in the emerging countries, personal contact is clearly the preferred method of communicating with government.

These findings all make clear the need for a robust multi-channel strategy. Governments cannot afford to invest all of their effort and resources in developing the online channel alone. Other channels will continue to play a critical role for the foreseeable future.

Despite its popularity as a means of contacting government, however, the telephone is consistently ranked as the least easy form of communication across all three country categories (emerging, developing and advanced). Clearly, citizens are far from universally satisfied with this channel. (See sidebar, *The telephone paradox*, page 31, for our assessment of the reasons behind this dissatisfaction and what governments can do about it.) In fact, 19 out of the 22 countries (86 percent) ranked the telephone as the *least* easy to use out of four channel options (telephone, Internet, in person and mail).

In contrast, despite its varying levels of use, Internet or e-mail contact with government is consistently highly rated for ease of use across all countries (see Figure 9). We believe this finding should encourage governments seeking to implement online solutions. User satisfaction with online government service is currently high and bodes well for increased migration toward this cost-effective channel in the future.

Despite being considered the easiest to use of all channels, the Internet (and e-mail) is still not the preferred channel of communication for citizens.

Figure 9: Net percentages* of respondents who found a channel easy to use

	Advanced	Developing	Emerging
Telephone	+43%	+34%	+31%
Internet	+77%	+71%	+69%
In person	+72%	+65%	+45%
Post/mail	+76%	+63%	+55%

* Net percentages were derived by subtracting the percentage of citizens within each country who thought a channel difficult to use from those who thought a channel easy to use. The net percentages for each country within a category (emerging, developing or advanced) were then averaged to provide the net percentages in this chart.

Citizens across countries agree: Telephone is the least easy-to-use channel for interacting with the government, while Internet is the easiest.

Not one country ranked it as the favored method for either contacting the government or receiving communications from the government. In this regard, citizen preferences closely follow actual usage patterns.[4] Advanced and developing countries tend to opt for the telephone as the preferred channel, while emerging countries prefer personal contact. Given the positive experience of those who have used online services in all countries, however, it seems reasonable that governments have a broad base of citizens ready to be moved to primarily online interactions. Again, the challenge will be getting the channel balance right.

[4] It should be noted here that these responses reflect the attitudes of citizens alone, and not of businesses and intermediaries—which account for a large amount of traffic to eGovernment sites in many countries. We expect the preferences of these groups, which handle high-volume transactions online, would be markedly different.

The telephone paradox

Our survey results show that citizens express a clear preference for the telephone channel in their interactions with government. It is easy to hypothesize about the underlying reasons why. The telephone channel provides the "human touch": talking to a real person gives comfort that a citizen's needs are being met on an individualized basis; gives the impression that there is one particular person who can be held accountable for ensuring the problem is addressed adequately; and provides some measure of reassurance that should further follow-up be needed, there will be a specific point of contact. In theory, the telephone requires the least mental investment—a citizen need not spend time becoming familiar with a website or searching fruitlessly; ideally, a qualified person on the other end of the line will do that legwork. Finally, the telephone can also be the most convenient channel, as it provides access from almost any location.

Yet citizens are also expressing distinct dissatisfaction with their telephone interactions with the government. The question is why. Clearly, their call center experience is not matching their expectations, perhaps for a number of reasons. Often when citizens call the government, they will be passed from department to department for even the simplest query. Governments typically have done little assessment of the most frequently asked questions: to get quick answers to the majority of citizens and direct others to an expert if need be. Both complex and simple questions alike are handled in the same way.

In other cases, it may be that the call center is not integrated into the behind-the-scenes workflow, which means the service agent is not readily able to associate the caller with the casework or correspondence that triggered the phone inquiry in the first place. Or it may be (and is often the case) that the behind-the-scenes processes simply are not organized around the customer, even if the technology integration is in place. The effects often compound: customers get frustrated at service agents' inability to help them effectively; service agents deal with a disproportionately high number of irritable customers and begin to treat customers as adversaries; and the cycle continues.

The challenge for government is to fix each of the root causes, which usually goes beyond implementing a technology solution alone. Integrating the call center into the office-based administrative processes and procedures also typically requires organizing the actual processes around the customer. For example, imagine a small business owner who phones a revenue agency with questions about personal, business and payroll taxes. Each of these questions may be treated as separate cases to be handled by separate departments. The citizen may dream of taking care of all his business in just one call, but finds it impossible. Until all of the back-end processes, practices and technology work in concert to allow the front-end agent to provide appropriate service, that citizen's experience will never be optimal.

It does not have to be this way. Implemented and run properly, a superior call center leads to more effective service delivery, which leads to a better customer experience and greater satisfaction. From the government's perspective, handling the telephone inquiry right the first time is a time and money-saver, as it prevents resources being spent on the same request twice. The desire and potential for telephone as a high-performing service delivery channel already exist. Now it is time for governments to invest the effort needed to achieve those positive outcomes.

The citizens' view

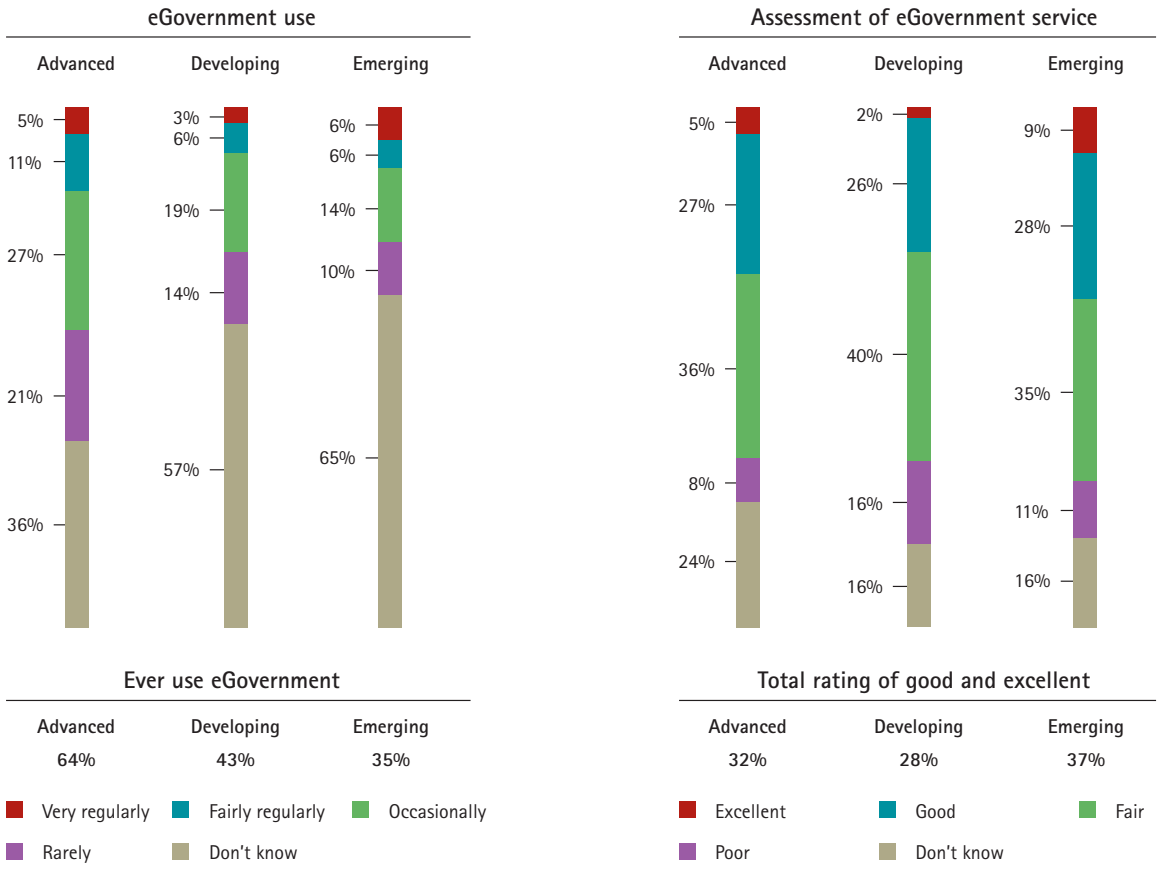
The way citizens rate eGovernment does not necessarily correlate to a country's position in our categorization scheme. For example, the citizens of Denmark and Norway, which rank near the top of the advanced countries, are less generous in their rating of eGovernment services than those in Mexico and Brazil, which fall into the developing and emerging categories, respectively. As shown in Figure 10, while 64 percent of Internet users in the advanced countries had ever used eGovernment (compared to 35 percent in emerging countries), only 32 percent of those reported an "excellent" or "good" experience in advanced countries (as compared to 37 percent in emerging countries).

Experience and expectation likely play a role in this apparent contradiction. Scandinavians are less likely to be impressed with developments because high-tech communication is the norm there. In less advanced countries, eGovernment developments of any sort seem to be greeted with considerable enthusiasm. Among Internet users in each country, some of the highest levels of endorsement for eGovernment come from citizens in Malaysia and Mexico (countries with among the lowest usage of eGovernment)—again underlining that citizen perception does not necessarily align with actual eGovernment maturity or adoption.

Cross-government interactions and information sharing

When we set out to examine cross-government interactions, we wanted to determine citizens' experiences with government acting as one entity, rather than multiple stand-alone agencies or departments across multiple levels. We wanted to gain insight into how well governments were doing in presenting

Figure 10: A view of use and assessment of online services



Citizens in emerging countries tend to be more positive about online services in general than more experienced users in advanced and developing countries.

a single multi-channel "storefront" to citizens, while being able to bring information from past interactions into play in subsequent interactions.

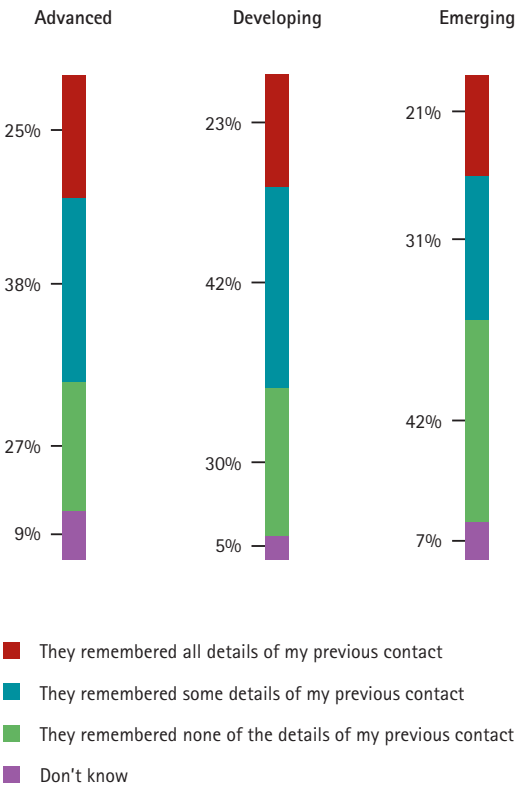
We found that across the board, most citizens interact with the government multiple times in a year, although significant differences occur between countries. For example, in most Scandinavian countries, 70 percent or more report multiple contacts, while in Japan and Singapore, multiple contacts are less common.

The experiences of those who had made contact with the same department or agency more than once are disappointing. For example, the United Kingdom, at only 38 percent, scored *highest* in terms of the percentage of citizens who said the government remembered all details of a previous contact. From another perspective, this means that for a considerable majority of UK citizens, at least some of the details from a previous interaction were lost. Considering this is the *best* score of any country, it points to how much work needs to be done in all countries in this area. Other countries fared far worse. Even in Canada, which ranked number one in our overall maturity ratings this year, 70 percent of the respondents claimed that the government had forgotten at least some of the details of previous transactions.

While we found little difference in how well advanced and developing countries are accomplishing "joined-up"[5] government, it is clear that emerging countries lag considerably. On average, 42 percent of the respondents in emerging countries said no details of the previous contact were remembered (see Figure 11).

Citizens' experiences of joined-up government (or disjointed government, as the case often may be) have a direct impact on their perceptions of how well government departments work together.

Figure 11: For citizens who contacted government more than once, how well governments remembered details of previous interactions

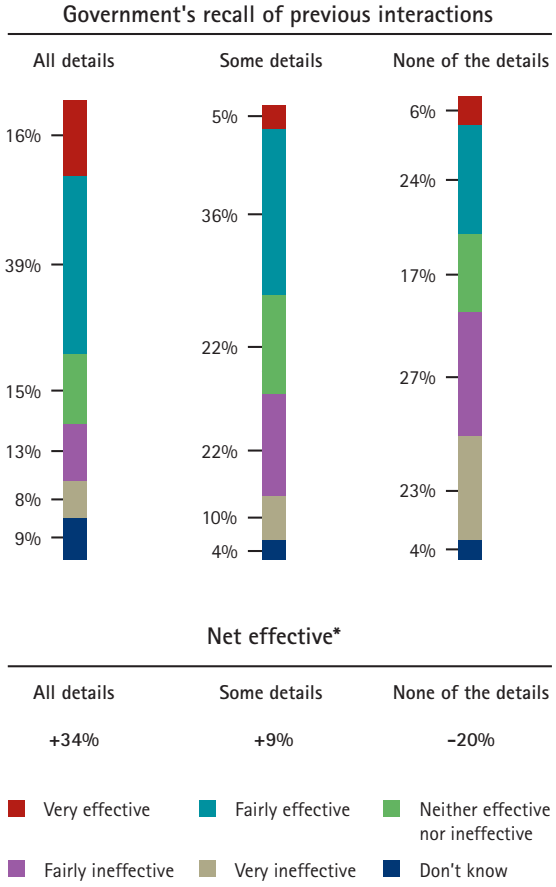


Advanced, developing and emerging countries alike have considerable work to do in effecting "joined-up" government.

[5] "Joined-up" government implies having the many different elements of government connected through linkages that are invisible to the citizen, but which provide for seamless service delivery.

The citizens' view

Figure 12: Impact of government's recall of previous interactions on citizens' perception of effectiveness



* Net effective numbers were derived by subtracting the percentages of those who said the government was either "fairly" or "very" ineffective from those who said government was "fairly" or "very" effective.

Government's ability to remember the details of previous interactions has a direct and powerful impact on citizens' perceptions of the government's effectiveness.

Figure 12, which is an aggregate of responses across all countries, shows that when governments remember all of the details of a previous contact, the percentage of citizens who think the government is effective at working together versus those who think the government is ineffective is 55 percent to 21 percent. That ratio changes to 41 percent effective versus 32 percent ineffective when the government remembers only some of their details. Finally, the drop in perception of effectiveness is quite alarming when government remembers none of a citizen's details. Thirty percent of the respondents think the government is effective in these cases, compared to fully 50 percent who think the government is ineffective. Clearly, instituting mechanisms to promote the efficient access to and recall of citizen data will have a positive impact on the citizen's view of a government's effectiveness.

Of course, for government departments to work efficiently together, they need to be able to share relevant information about citizens. This prospect excites differing responses. Across all countries, most citizens have little difficulty with the sharing of standard information such as name, address, nationality and marital status. In fact, in most countries, citizens tend to be reasonably comfortable with all aspects of data sharing, with the exception of medical records and, to a lesser extent, tax details.

There are, however, strong contrasts between individual countries, highlighting very different levels of trust in government among citizens. Japanese citizens report the most discomfort with data sharing. In fact, more Japanese citizens were more uncomfortable than comfortable sharing data related to their education, birth date, employment, address, passport, social security number and tax and medical records.

American citizens also display considerable discomfort with sharing some details, including tax details, medical records and most particularly, social security

numbers. Fully 74 percent of American respondents were uncomfortable sharing social security numbers (compared to 19 percent who were comfortable). This attitude was striking, given how many government transactions require this information. We expect that this result is likely due to a high level of awareness about identity theft in the private sector should a social security number (essentially, an individual's keys to personal identity) fall into the wrong hands—rather than actual negative experiences with government sharing information.

Taking an overarching view, emerging countries seem most comfortable with personal data sharing across government agencies and developing countries least comfortable. Still, as Figure 13 shows, much work needs to be done across all countries to develop the necessary level of acceptance of data sharing to enable true cross-government interactions.

Figure 13: Citizens' comfort levels with personal information sharing

For those citizens who expressed any level of discomfort with personal information sharing, these were the reasons:

	Advanced	Developing	Emerging
Any privacy concerns	37%	46%	49%
Personal information	20%	27%	29%
Concerned about how the details will be used	17%	22%	21%
Concerns over who will see/use the information	17%	18%	17%

Advanced and developing countries have even more work to do than emerging countries to develop citizens' comfort with their personal information being shared within and across departments and agencies.

Instituting mechanisms to promote the efficient access to and recall of citizen data will have a positive impact on the citizen's view of a government's effectiveness.

The citizens' view

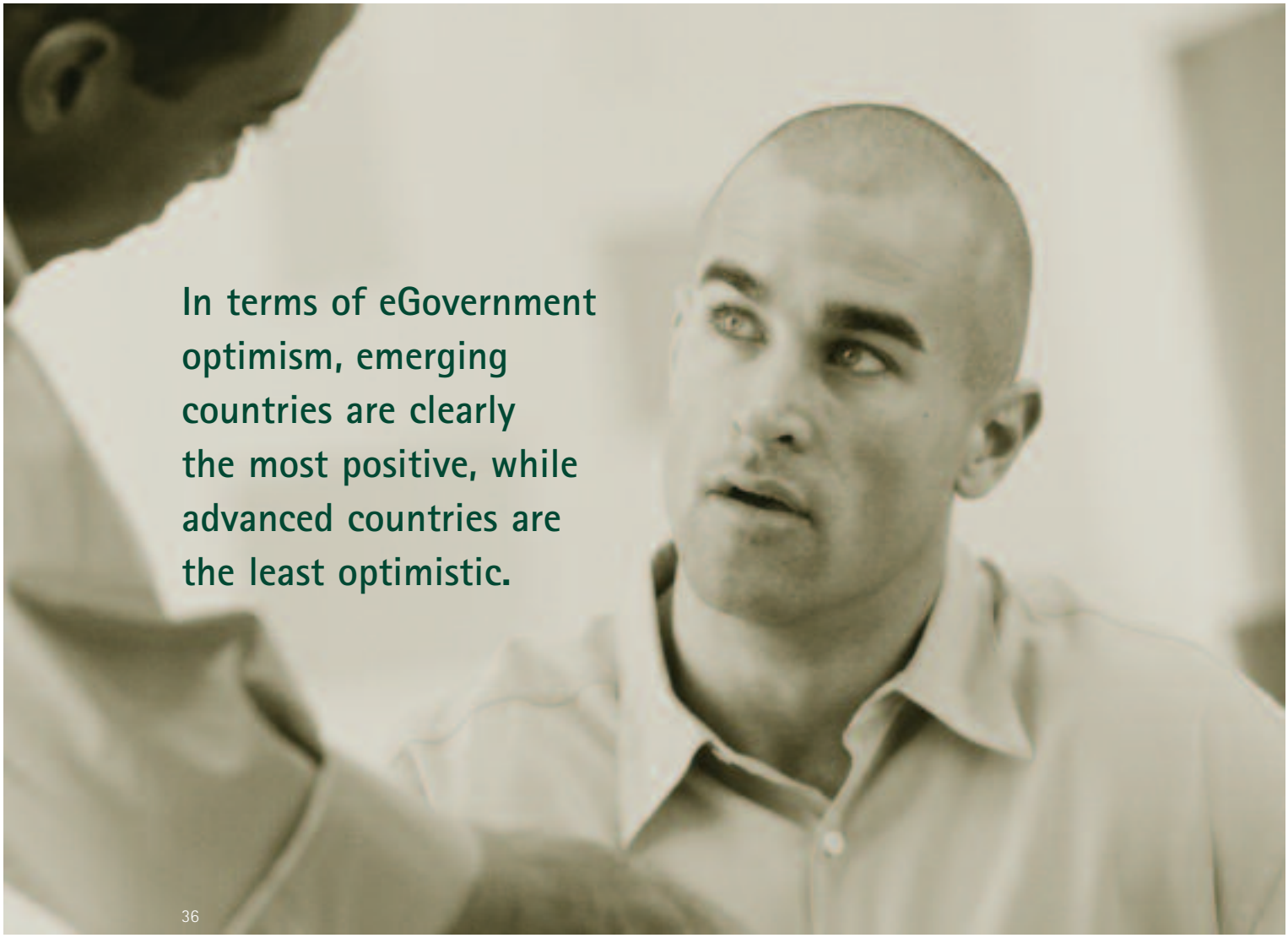
Across all countries, privacy issues are the main concern in relation to data sharing. To build greater trust, governments could begin by sharing less-contentious information and then progress to more sensitive data once people are assured of the benefits and security of shared information. They also need to be highly conscious of security requirements and communicate security policies to build confidence in what they are doing.

Triggers and barriers to future interactions

As we looked at the triggers and barriers to the future of government service delivery, we began by determining citizens' attitudes toward eGovernment overall. We classified citizens as either eGovernment optimists (those who agree that eGovernment will make government more efficient and more accountable) or eGovernment pessimists (those who disagree that eGovernment will make government more efficient and more accountable). What we found was surprising.

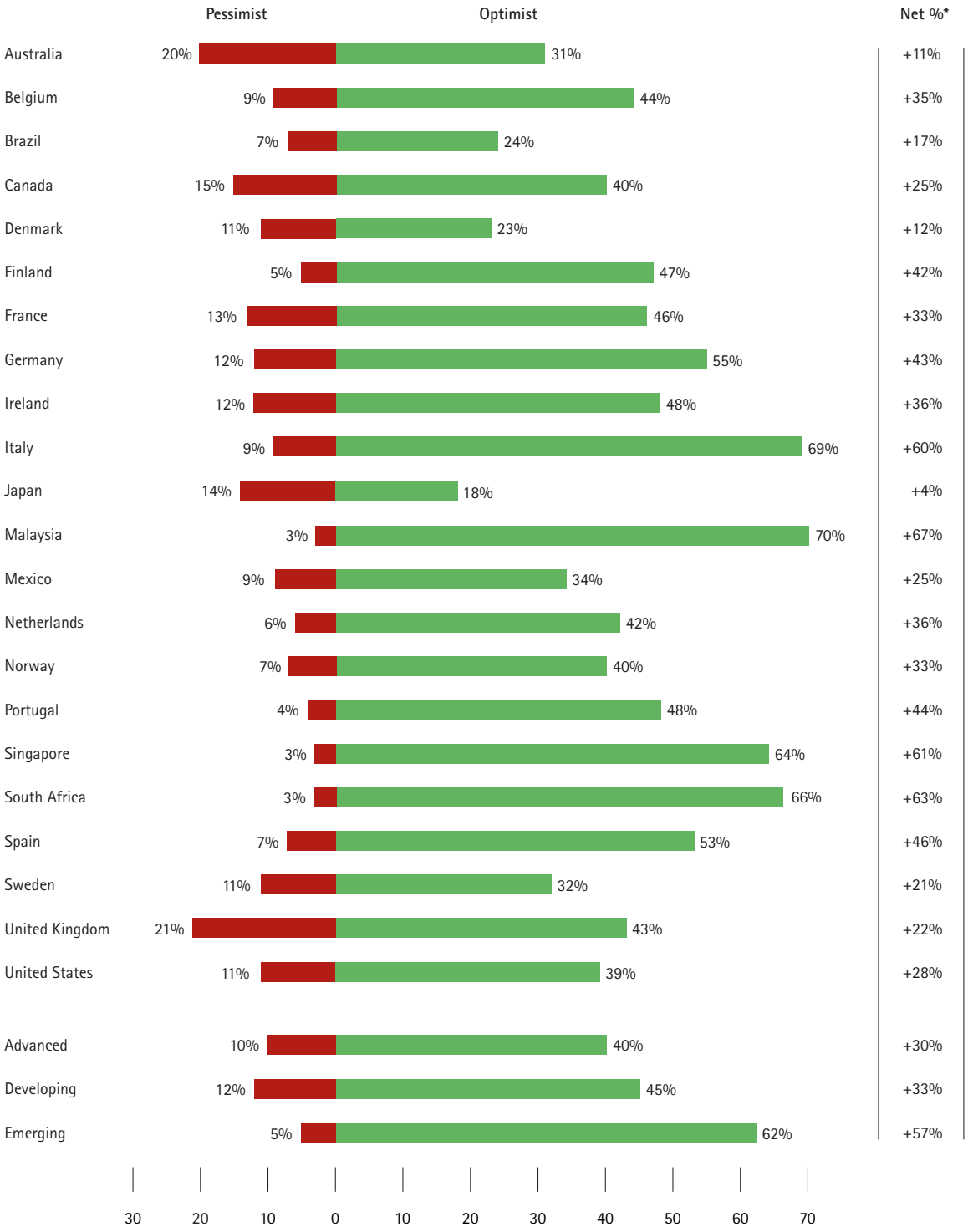
In terms of eGovernment optimism, emerging countries are clearly the most positive (57 percent net positive) while advanced countries are the least optimistic (30 percent net positive). Figure 14 illustrates the relative pessimism and optimism in each of the 22 countries.

We believe these results reflect the types of expectations citizens have in relation to online service delivery. Whereas citizens in advanced and developing countries may be more likely to use the online channel, they now see e-services as the norm, rather than as a new departure in government service delivery. Their greater experience with the Internet in general will likely have bred higher expectations;



In terms of eGovernment optimism, emerging countries are clearly the most positive, while advanced countries are the least optimistic.

Figure 14: eGovernment optimists and pessimists



* Net percentages in this chart refer to the net number of eGovernment optimists in each country. These numbers were derived by subtracting the percentage of pessimists from the percentage of optimists in each country.

Emerging countries are most enthusiastic overall about eGovernment, while advanced countries are least enthusiastic.

The citizens' view

Figure 15: Perceived usefulness of services within countries (net useful*)

	Advanced	Developing	Emerging
Provision of more information on currently available services and how to access them	+73%	+75%	+86%
Greater use of other outlets to distribute information (e.g., post office, pharmacies, banks)	+49%	+61%	+83%
Provision of self-service electronic kiosks in department stores, grocery stores and other convenient locations	+9%	+28%	+73%
Government walk-in centers	+50%	+59%	+82%
Centralized government call centers to direct citizens to the exact service they need	+63%	+70%	+85%
Provision of more government services through the Internet	+49%	+52%	+70%

* Net responses were determined by subtracting all those who disagreed the item would be useful from those who agreed it would be useful.

Opinions are decidedly mixed about the usefulness of self-service kiosks.

all services will need to compete in their minds with the memory of the best online interactions they have had.

In terms of the positive steps that governments can take to enhance service delivery, most countries are well disposed to potential new channels. Citizens voiced strong support for call centers, walk-in centers and new distribution outlets (such as banks and pharmacies), due to the wide access that they can offer. Brazil in particular expressed decided enthusiasm for these additional access points. Ninety-eight percent of Brazilian respondents felt these channels would be useful, the highest positive of any country.

Electronic kiosks received more mixed opinions. While most countries think these kiosks would be reasonably useful, Scandinavian countries clearly do not, likely due to their already high levels of Internet access (see Figure 15).

More online services are also uniformly welcomed across countries, although support in individual countries tends to fall away with age and among non-Internet users. Overall, the non-Internet service delivery channels continue to be the most accepted and reach the largest number of people. Government should view these channels as the starting point for developing more efficient access to citizens for the immediate future.

Our research also delved into the degree of support for specific policy measures to promote the adoption of the online service delivery channel. Here we consistently saw that citizens expressed some concern at any measures that could be perceived as being unjust or unduly intrusive. For example, while the prospect of citizens receiving discounts for using online services is favorably greeted in most countries, a sizable number of respondents viewed the prospect as unfair or divisive.

Figure 16: Attitudes to policy options within countries (net agree*)

	Advanced	Developing	Emerging
Government should provide discounts to encourage people to access government services online via the Internet (e.g., reduced driving fine paid online)	+16%	+29%	+65%
Require certain groups to access government services online (e.g., student loans)	-25%	-10%	+32%
Conduct public education and promotion campaigns encouraging people to access government services online	+42%	+55%	+81%
People should access government services in a manner that suits them—even if this means higher costs to government	+47%	+45%	+64%

* Net responses were determined by subtracting all those who disagreed with a statement from those who agreed with it. In a few instances, the result was a net-negative number.

Not surprisingly, the idea of required use of the online channel for government service was met with a decidedly negative reaction, as illustrated by the net-negative responses in both advanced and developing countries.

Not surprisingly, near universal opposition was expressed at the prospect of requiring particular groups of citizens to use online services. Few countries support the notion; even those with the highest online access (such as Finland, Sweden and Australia) were strongly opposed. This is clearly a step that most citizens are not yet willing to accept, and most would probably see it as discriminatory (see Figure 16).

Similarly, citizens in all countries (with the exception of Japan) believe that citizens should be able to access government services by any means they wish, regardless of the cost to government. Thus, eGovernment's preeminence as a service delivery channel is clearly impacted as much by notions of equitableness as it is about physical access to infrastructure. Few citizens currently seem willing to be forced into any one particular communication channel. In general, governments should tread softly in their attempts to encourage online access. One way of doing this may be to convince citizens that "access to all channels regardless of the cost" translates into something they must pay for from their own pockets through taxes.

However, we propose that requiring use of certain channels in some instances is the right course of action. Of course, the services need to be introduced and tested before moving to a required model, but targeted audiences—such as large businesses, selected intermediaries and recipients of certain student services—would be good examples of the Internet-savvy, targeted audiences for whom such an approach would be well worth consideration.

Overall, attitudes toward eGovernment are positive around the world. Few citizens doubt the efficiencies and benefits that can accrue to government and to themselves as a result of its implementation. All countries should harness these positive views, as they seek to encourage citizens to use new communication channels and migrate them toward increasingly advanced models of leadership in customer service.

Best of the best

A sampling of innovative practices

In this section in past years, we have focused on innovative eGovernment practices across different industry types.

This year, in keeping with our new focus on the broader dimensions of high performance through leadership in customer service, we decided to take a fresh approach to presenting the most innovative practices in government service delivery.

Our featured practices represent the four facets of leadership in customer service delivery. In fact, many contain aspects of some or all of these facets: government service that is citizen-centered, multi-channel, cross-government and proactively promoted. In certain instances we have also highlighted what we consider to be the innovative enablers—those tools and practices that governments are employing that will set the stage for a transformed vision of value for the citizen. These are the practices "behind the scenes": the types of foundational elements governments will be putting into place over the next few years that will enable them to explode into the public consciousness with an entirely new way of interaction.

While the following are all excellent examples of value-led service delivery, they should by no means be considered an exhaustive list; our intent, rather, is to give a flavor of the types of remarkable innovation in government service delivery we uncovered in our research. Likewise, not all practices featured have been fully implemented. We will be monitoring these in years to come to assess their impact as they become fully operational.

First contacts with impact

The following examples highlight innovations in governments' masking their internal organizational structures to act as one entity and present a unified "storefront" to the citizen.

While not a national service, New York City's 311 service (accessed by dialing 3-1-1 within the city or 1-212-NEW-YORK outside it) is a fine example of both cross-government and citizen-centered service delivery. 311 is an all-purpose call center that provides callers with the information they need about any city government service, day or night. With 311,

New York City has consolidated 40 separate centers, and 14 pages of contact telephone numbers into one location and phone number. 311 now handles approximately 40,000 calls per day[6] and provides a uniform customer service experience. Citizens can use the service for information on virtually everything—noise complaints, landlord complaints, subway or bus information, traffic signal outages, potholes and towed vehicles, to name just a few. In effect, it is the first "face" of city government and eliminates communication barriers government-wide.

France's Allô, Service Public (accessed by dialing 3939) is similar to the NYC 311 cross-government concept. Launched countrywide in October 2004 after an initial, successful pilot, Allô, Service Public allows any citizen to obtain an answer or a direction for any request for administrative information in less than three minutes. The service has been a tremendous success. According to a survey in two regions, more than 80 percent of the users of the service considered themselves to be satisfied or very satisfied with Allô, Service Public. In particular, respondents expressed an appreciation for having a single (human) point of access, as well as for the quality and speed of the response. Perhaps most telling, 99 percent thought they would use the service again.

While Canada's eContact service (currently in pilot form) follows a different delivery model than New York's 311 and France's Allô, Service Public telephone services, the impact will be much the same. eContact is a collaborative multi-jurisdictional project designed to improve access to government services across the whole country. As with 311 and Allô, Service Public, eContact directs citizens to the appropriate contact/information, regardless of jurisdiction or location. One of the more striking aspects of the program: eContact uses a Natural Language Processor and a search engine to interpret the citizen's query and then locate a similar question from a database of questions and contact data provided by jurisdictions across Canada. The government achieves efficiencies in costs related to passing the query from department to department, while the citizen is better served. Over time, eContact will look at multi-channel access, beginning with the telephone, where an agent provides the link between the citizen and the required information or services, and evolving to direct Web access.

Improving access and convenience

In the examples that follow, we show how some governments are establishing single access points, either physical or virtual, to a wide range of government services—with the net effect being increased ease of interaction for citizens.

Malaysia offers an interesting example of a third party acting as a service access point for cross-government service delivery. As an established trusted third-party business organization, the Malaysia Postal Service, Pos Malaysia (www.pos.com.my), has been appointed by various government departments, statutory bodies and other private companies to conduct transactions on their behalf. The service is a fine example of leadership in customer service; Pos Malaysia functions as a one-stop citizen service center for the public to perform various government-related activities, such as renewing a driver's license, registering to vote, paying utility bills, repaying student loans, making social security contributions and paying a variety of other taxes, as well as a range of other nongovernmental services, from booking flights and hotel reservations to shopping for home products and digital appliances. Recent enhancements include the development of drive-in counters at certain locations and extended nighttime operating hours.

Japan is creating a cross-government, citizen-centered service led by the Ministry of Land, Infrastructure and Transport (MLIT). MLIT is piloting a one-stop service for automobile-ownership-related procedures. Through a single Internet site, users will be able to conduct various transactions, regardless of whether the actual functions are the responsibility of other ministries, local government, law enforcement or even the private sector (such as car makers, dealers, financial institutions or insurance companies). With this extensive collaboration in place, the piloted system is targeted to go live in December 2005.

[6] As of November 2004.

Best of the best

The South African Post Office's Paymaster to the Nation project promises to make life considerably easier for recipients of pensions, particularly those who live in remote rural areas. Under the scheme (which has been successfully introduced in the country's North West Province with plans for introducing in other areas), welfare grants and pensions are paid into a Postbank account that is linked to a smart card containing a magnetic strip and a chip, which contains the beneficiary's fingerprints and photo to eliminate fraud. Most recipients of social benefits do not meet the requirements needed to open an account with a commercial bank; the Paymaster to the Nation project enables them to enjoy the benefits of a bank account for the first time. Recipients can earn interest on their money and withdraw money at any time from any ATM or from any post office branch. The scheme will also save beneficiaries living in remote areas the time and cost involved in traveling long distances to a payout point and having to stand in line to collect their money.

In Italy, the Istituto Nazionale della Previdenza Sociale (INPS), the main Italian welfare administration, has packaged the bulk of its branch services into an easy-to-use application called INPS servizi per i comuni (INPS services for municipalities), and made it available for civil servants of local municipalities. Services are logically organized around the citizen, and users of the service have to submit only one request, regardless of the agencies who must be involved to fulfill it: INPS and local authorities collaborate to satisfy the citizen's needs. By making services available across multiple channels (including INPS local offices, call center and various local agents, such as assistance offices, trade unions and employee associations), INPS has taken an innovative step to open additional access channels for some of the most vulnerable citizens (the elderly without adequate financial means, the unemployed and retired employees) in a country with a relatively large digital divide.

Connecting the dots for citizens and businesses

The examples that follow illustrate how some governments are acting as a single entity to ensure the right information is available to their customers at the right time.

In Denmark, the National Agency for Enterprise and Construction is making it much easier to search for and extract property data through its Public Information Server (Offentlige InformationsServer, or OIS, at www.ois.dk). OIS is the only collection of property data on the Internet in Denmark, and it gives public authorities, enterprises and citizens convenient access to publicly compiled property data through a single portal. The portal offers access to more than 400 pieces of information on each property in Denmark: by using a digital signature

National Agency for Enterprise and Construction

or government-issued unique "Centrale Person Register" number and pin code, a user can access private information on a property, send change requests to the relevant municipality and print information from the Danish Building and Housing Register (a process that normally costs DKR 70,00 and takes two weeks). Since its inception, OIS has experienced strong adoption: in 2004 OIS handled more than 55 million requests from businesses and citizens and the site received more than 438,000 unique visitors.

In collaboration with local, regional and national authorities, Britain's National Health Service (NHS) is beginning to develop lifelong electronic health records for 50 million patients. This is an example of cross-government collaboration at its best; linking to local systems will provide the NHS an IT infrastructure in five regions, while providing IT support for the 30,000 doctors and 270 health care delivery organizations in England expected to participate over the next 10 years. The program will allow doctors to access up-to-date records as required to treat patients and confirm that they have the right information in front of them at the right time. Input to these records will ultimately come from a variety of clinical sources, and the record will be updated directly by the clinician. To address privacy concerns, strict rules govern use, and no other governmental

departments will have access to this part of the NHS system. Similarly, in Singapore, the Ministry of Health is planning to partner with two corporate entities, Singhealth Services and National Healthcare Group, to develop an Electronic Medical Records System Exchange (EMRX). EMRX provides a one-stop service for patients' medical information and past health care treatment information for all public hospitals and clinics in the country. It takes an enterprise-wide approach to integrate care across multiple facilities. Doctors are now able to retrieve information from other institutions instantaneously—even during consultations with a patient—without having to log into a separate system.

The Australian government introduced the Business Entry Point Transaction Manager, or BEP Transaction Manager (www.business.gov.au), in late 2003 to give businesses a faster and easier way to deal with government. This is a striking example of citizen-centered, proactive, cross-governmental service. BEP Transaction Manager helps businesses find, manage and complete government forms and transactions online without having to understand how government organizations or individual agencies work. It dramatically improves businesses' ability to navigate the maze of government structure. In fact, users can already access more than 5,500 transactions from agencies across all three levels of government using BEP Transaction Manager. This functionality is particularly valuable for small businesses, which may not have the resources to spend much time on learning the ins-and-outs of the multiple government agencies with which they will interact in setting up and maintaining operations.

Opening channels of interaction

The governments in the examples that follow have all implemented multi-channel strategies to broaden the reach of their offerings and help provide citizens service on their terms.

South Africa heavily leveraged the tools of multi-channel government to promote "free and fair" national elections in 2004. From voter registration to counting ballots and making election results available to the public, every aspect of the election was underpinned by innovative technology. To begin, the Independent Electoral Commission (IEC) developed partnerships with cell phone service providers, which enabled voters to short message service (SMS) their identity number and in return receive a message back indicating their eligibility to vote and voting station details. Next, custom-designed handheld scanners captured information from bar-coded ID books and greatly streamlined the process of voter registration. At any time in the electoral process, the public (and IEC members themselves) could also use the SMS technology integrated with an issue tracker system to report any problems in any of the voting stations. Likewise, IEC presiding officers could use the technology to send voting station status feedback to the head office. Throughout the election itself, IEC used the SMS service to report ongoing election results. By most accounts, the election was a resounding success: The number of registered voters increased by more than 2.5 million citizens over the previous election and voter turnout was 77 percent.

In the Netherlands, the Informatie Beheer Groep (IBG) is an independent institution that manages many higher education functions on behalf of the Ministry of Education, Culture and Science. The IBG has gone to great lengths to develop a multi-channel strategy that encourages the optimal channel mix for service delivery (www.ib-groep.nl). The IBG is taking advantage of the increased use and technological sophistication of Web forms to drive more routine traffic to its "Frequently Asked Questions" module. The effort seems to be working: In 2004 this module was contacted 1.5 million times—a 100 percent increase over 2003. While telephone traffic has not decreased (largely due to a dramatic increase in new students with student grants), the IBG is developing strategies to continue to offload as much of this traffic as is feasible to the more efficient and cost-effective online channel while continuing to support traditional channels. Key in this effort is the development of fully automated customer contacts through the secured Internet portal, My IBG, which will allow customers to alter their personal data directly in the system. When logging on to the My-IBG portal through a secured connection (SSL), a correspondence number and password will be requested. Next, an SMS text

Best of the best

will be sent to the mobile phone of the customer, containing the unique admission code to the portal. Every time a client logs in, a new unique code will be sent.

In Sweden, the National Tax Board expanded its service delivery channels with the introduction of an SMS capability for filing national income taxes. Swedish citizens already receive a pre-calculated tax form from the National Tax Board, based on information from their employers, financial institutions and other entities. If the information is correct (which it is two-thirds of the time),[7] the citizen has only to accept the tax form by signing a document, physically or online. With this new service, the citizen receives a code along with the tax form. The citizen then has only to send an SMS with this code to the Tax Board to accept the tax form. The Tax Board issues an SMS in response, confirming that it has received the citizen's acceptance. The service is also offered via an automated telephone system and the Internet, and in the near future is expected to begin to handle more complicated returns. Norway offers a very similar service and is moving toward converting the entire process—from notification by the government of the on-record tax form to any changes and, finally, confirmation by the citizen—to electronic channels in 2005.

The My.eCitizen (http://my.ecitizen.gov.sg) personalized front-end to Singapore's eCitizen portal taps into multiple access channels, bringing government e-mail and SMS alerts from various agencies. Citizens can subscribe to receive reminders about due library books; road tax and passport renewals; required semi-annual medical examinations for foreign workers; and outstanding traffic fines and fees, among other services. Singaporean citizens have responded with great enthusiasm to their extensive ability to customize My.eCitizen. In the past year, there has been an eight-fold increase in subscribers to the personalization service of the My.eCitizen portal—from 2,500 to 20,000.

Pay-easy is Japan's next-generation payment system, which makes online payments possible using the Internet, ATMs and mobile phones (www.pay-easy.jp). Launched in January 2004, the multi-channel Pay-easy allows users to pay not only for commercial transactions, but also income and corporate taxes, national pension premiums and viewing fees for the Japan Broadcasting Corporation—at the time and through the method of their own choosing. Eventually, the electronic service will cover the entire financial transaction: from presenting bills electronically to consumers, to identifying account holders through cash card and PIN numbers and allowing for direct electronic fund transfers, and, finally, to making payment information immediately available to agencies.

Building a single view of the citizen

A number of governments are putting the foundation in place to enable a vast array of new services in the future. Here, we highlight some of the most striking examples of the innovative enablers that will allow governments to build the single view of the citizen that will be the basis of truly citizen-centered service.

Belgium is leading the way for the European Union by being the first member country to begin the process of supplying its entire population with an "electronic identity card," which will act as the sole identity card. Over the next five years, approximately 10 million cards will be produced and distributed to Belgian citizens, and by the end of 2009, every Belgian citizen will be required to have one. The card will contain an embedded microchip storing the holder's personal data, including date of birth, parenthood, civil status, current and past addresses. This personal information will be linked to the country's central population register and updated using stringent public key infrastructure (PKI) standards. The chip will also contain a digital certificate enabling remote authentication of the holder, and a second certificate to enable digital signature. While the card will contain no information other than the user's unique ID, it is already used to access personal income tax information and some home banking applications. The electronic identity card can be the door to a wealth of information for

[7] This number references individual citizens who do not run any type of business. Including businesses, somewhat more than half of all precalculated tax returns are correct.

Accessibility for all

Governments must ensure that all citizens, including those with disabilities, have equitable access to the services they offer. As part of our background research, we investigated the policies and practices of governments with respect to ensuring accessibility for the disabled. What we found is that most governments still have a way to go in ensuring universal accessibility. While the majority of governments have established guidelines and standards for Web content accessibility in accordance with World Wide Web Consortium (W3C) guidelines, few have required compliance.

The United States is an exception, having one of the more comprehensive approaches to ensuring access. As required by Section 508 of the Rehabilitation Act, making online federal government services available to all citizens is the law. Section 508 further requires federal agencies to ensure that the electronic and information technology (EIT) that they develop, procure, maintain and use is accessible to their employees and to consumers with disabilities. To continue to work toward making full accessibility a reality, some US agencies are taking innovative approaches. The Department of Homeland Security, for example, recently announced creation of a Section 508 Compliance Office to meet the goals of the legislation.

Other countries have not gone to such lengths. For example, the "Irish National Disability Authority IT Accessibility Guidelines," which are the nationally accepted standards in Ireland, are not underpinned by specific legislation. In the Netherlands, the Drempels weg (Away with Obstacles) project began in March 2001 with the aim of making the Internet more accessible. However, although the program has received attention, organizations and agencies are not forced to comply with its guidelines.

Likewise, even as increasing numbers of government agencies commit to making their Internet activities accessible for all, few have procedures in place to ensure consistent implementation and systematic measurement of their recommended actions. For example, in Spain, the Ministry of Public Administration published a memorandum and rules for all central government websites to be compliant with the international accessibility standards of the Web Accessibility Initiative (WAI) of the World Wide Web Consortium. It has also reached an agreement with the Spanish National Organization of the Blind (ONCE) to make all central government websites accessible. However, not all websites currently meet the standards and no official audits are conducted to measure their efforts.

Despite the lengths many countries still need to go, we did find evidence of movement in the direction of ensuring accessibility in many countries, as well as pockets of truly innovative processes and applications. In Australia, for example, the Human Rights and Equal Opportunity Commission (HREOC) is responsible for promoting the objectives of the Disability Discrimination Act (DDA) and providing advice about the implications of the Act for website operators. Beginning in June 2000, agencies had to ensure all of their existing websites had been tested for accessibility, and all new website contracts were to include accessibility as a key performance measure. In other words, while standards are not enacted through legislation in the strictest sense, the HREOC does enforce the Disability Discrimination Act and compliance with this act implies compliance with its standards. In Belgium, both the French and Dutch language versions of the federal portal have been awarded the "blindsurfer label." This label certifies accessibility to portal content for visually impaired users and is awarded only after thorough evaluation by the BlindSurfer association. While authorities are encouraged to obtain the blindsurfer label, there is no law. However, Belgium is still ahead of the curve, as not only do the federal websites have this label, but most regional websites do as well.

those who have the authority to access it. It can be used as identification and authentication for home banking applications, secured Internet chat rooms for children, personal data in the National Register, company networks, library accounts and so on. The government is also putting the infrastructure in place to enable widespread use of the cards; the cards will be usable with a card reader connected to a PC in people's homes or in public kiosks installed in towns, in local authority buildings and in other institutions.

Similarly, the MyKad smart card in Malaysia was introduced to replace the conventional national ID for the Malaysian citizen. By the end of 2005, approximately 15 million citizens (58 percent of the population) will be using the card. The government has put the infrastructure in place to drive high usage of MyKad: the personal identity information is protected with public key infrastructure (PKI), and 200,000 card readers have already been deployed. Malaysia is making innovative use of the MyKad card, and the array of services already available is impressive. For example, the card can be used to facilitate quick exit from and reentry into Malaysia by validating passport information and to access confidential health information and improve safety (by expediting the right care in emergencies). MyKad also works as an ATM card and as an electronic payment system for small purchases and tolls. The government is committed to successful integration of the card into the fabric of society; in fact, it continues to focus significant effort on finding additional ways to leverage the smart-chip technology to deliver its services.

Facilitating the flow of people and goods

Other innovative enablers will work to ensure the secure movement of people and commerce within and across borders.

The United Kingdom has plans to incorporate biometrics to protect its borders in the near future. The e-Borders program is a crosscutting initiative coordinated by the UK Home Office in partnership with key border control, law enforcement and intelligence agencies. Once in place, the e-Borders system will deliver timely biometric and other data on all travellers to relevant agencies and check individuals against databases of those who pose a security risk. It will also help identify those who overstay in the country. The e-Borders program is truly collaborative, involving the Foreign Office, intelligence agencies and police service, Revenue and Customs, and the Department of Work and Pensions. Future plans for the program include development of a voluntary iris recognition program, designed for frequent travelers in and out of the country. The government plans to roll out iris recognition stations at a number of terminals by the summer of 2005.

In the area of transportation, the Netherlands plans to introduce a groundbreaking new e-ticketing system for public transport in 2005. The new system, which will cover train, metro, bus, ferry and tram journeys, will be the first e-ticketing and payment system in the world to be implemented on a national scale. In the program (currently in pilot form), passengers will use a smart card that can be loaded with value using machines in the stations or through automatic debits from a bank account. An electronic reader will scan the card and deduct the fare before passengers board. The goal is to limit fare evasion, increase security, improve passenger convenience and enhance management information for public transport operators. Meanwhile, the seamless integration of all transport ticketing and payment systems across Holland will allow passengers to travel from one end of the country to the other using a single ticket. Denmark is proposing something similar with its Danish Travel Card initiative. Should it be implemented as planned (beginning in 2007 in Copenhagen and rolling out to the rest of the country), the card would replace all paper tickets and ticket subscriptions throughout Denmark.

In Singapore, the government has plans to launch an integrated trade and logistics platform that will manage the flow of trade-related information. This trade platform will help alleviate multiple data entry steps, which will lead to less duplication of effort, fewer human errors and improved efficiency and time to market. By enabling the automated exchange of information between shippers, freight forwarders, carriers and financial institutions, the new integrated IT platform will make the movement of goods within, through and out of Singapore more hassle-free, with the ultimate goal of making Singapore more competitive as a world-class port and logistics hub.

Conclusion

The government of the future

Across the board, we see that governments have reached the upper limits of services they can put online (although few have achieved widespread adoption). Likewise, many are approaching the limits of what can be done with these online services, as is, in their current form.

The question is, How has what they have done generated real value for the citizens? For all of their investments, do we find evidence that governments are delivering truly better outcomes?

So far, public-sector value gains from eGovernment have been incremental and limited:

- Yes, government information is more readily available, and that has reduced frustration for citizens and costs for dissemination.
- Yes, some services have been adopted widely enough to reduce costs significantly.
- Yes, we have seen some examples of service delivery innovation that have led to increases in convenience for the customer and reduced processing costs for the government.

What we have *not* seen yet, however, is the reinvention of service delivery in the government sector, using new practices, processes and technology as enablers. The agenda now is to move from driving development of eGovernment for its own sake, to driving public-sector value through transformed service delivery. The government of the future must be ready for the customer of the future: the up-and-coming generation, with a familiarity and ease with multiple technologies and an assumption of always-on service, ready for them whenever they desire. These are not the people running governments today, nor are they by-and-large the populations governments currently serve. They soon will be, however, and governments need to be ready for them. That is the challenge. It is time for governments to reinvent themselves…again.

What if we could imagine government so transformed that the current models of service delivery—and the processes, structures, governance and culture that go with it—are completely swept aside? What if we could imagine a transformation, not only in the service delivery mechanisms, but in the services themselves? Where government uses technology to significantly improve how well it achieves its statutory purpose? Where government has dramatically increased the reach of its services to citizen groups and radically transformed the costs of delivering those services? Where govern-

ments are able to provide entirely new services enabled by technology, and unencumbered by historical ways of doing things?

Imagine, for example, if when a citizen telephoned a government department, that department knew who the citizen was, had all of the relevant information about the citizen at hand and was able to deal immediately and efficiently with the citizen's issue. Consider human services, for example. Imagine a scenario where a single parent who has been injured on the job calls her government to inquire about the status of her social security disability benefits application. Before speaking to an agent, she enters her special identification code (personal identification number). The government's frontline agent is then able to pull a complete history of this citizen and not only provide the information she requests, but also information on state-issued health care and temporary cash assistance programs, relevant job training for reentry into the workforce and even help in arranging transportation to medical appointments.

Now imagine education, for example. In the future, technology will allow many functions of schools to become much more local in delivery. The manner in which many schools are managed today is largely inherited from the administrative and infrastructure needs of the past. In the future, governments could completely reverse that trend. Administrative services could be shared, allowing schools to become smaller and more agile—leading to more effective student-teacher ratios. Supplying teachers with the right support and training and applying new technologies in innovative ways could enable multiple models of education to suit children's different learning styles. By providing new learning offerings over the various channels of delivery, for example, people could combine models of home schooling and public schooling by tapping into specialist learning and administrative resources. Schools could become much more flexible in terms of where they are located and what hours they operate. Communities could reinvent how schooling is delivered to accommodate greater diversity and enable far more local autonomy.

We can imagine the same sorts of analogies in health care, where innovative technology could move much more of health care back to the local medical practitioner or the local hospital. Technology could allow dynamic configuration of health care teams and ways of consulting specialists; it could, in fact, reconfigure health care and make the need to travel to big, impersonal centers unnecessary in many cases. For example, imagine a chronically ill patient who needs regular supervision for his medical condition. While complicated surgeries may still need to be conducted at large centers with highly specialized equipment and surgery teams, in the future, regular monitoring, tests or follow-up care (which often are delivered through the large centers as well) may now be able to be moved to local outlets or done in the home. The model would reduce costs for health care organizations and patients alike, by keeping the resources of the large centers focused on the most complicated procedures and by minimizing the amount of patient travel (or even relocation) necessary. Even more important, however, will be the higher quality of life for the patient and his or her family, who will be able to spend much more time in comfortable, familiar environs at a time when they are least equipped to deal with additional stress.

In the area of revenue, taxation models could be absolutely turned on their head. Imagine the current flow of money, where at various points in the cycle, money gets pulled out to pay for government service (such as when an employer pays an employee or when a customer pays a retailer). The current tax points date from a different era, where all payment transactions were instances where cash passed hands. These points were chosen because they were easiest to see and control. The way of the world today, where money is less and less paper and coins, begs the question, "Could we choose a different point of taxation?" Cash itself may become obsolete, as smart cards take hold and enable even micro transactions. Now imagine if, instead of having an array of taxes, there was a simple financial transaction tax—a small percentage collected on every electronic dollar that flows in and out of an account and calculated based on very specific, specialized rules for a particular individual. The principle could apply to businesses as well as citizens and vastly simplify the taxation process and allow for much more flexible taxing authorities. As money came out of an account, the appropriate tax could be directed toward federal, state/regional and local/municipal governments.

Obviously, if we were to imagine government service in the future, there would not be just one picture. Different services or clusters of services will

Conclusion

undoubtedly travel down different paths; indeed they should—in a reflection of their different missions and the clients they serve. As we illustrated here, the future organizational form education takes, for example, will likely be very different than the one revenue takes.

Everything we have described here is achievable. In fact, some aspects are happening right now. While the manifestation of these services might differ across sectors, the underlying themes will be the same across government—no matter the agency, no matter the level of government, no matter in which country the service is delivered. Leadership in customer service will be unmistakable, and the facets we have described throughout the report will be crucial. Service delivery that is citizen-centered, multi-channel, cross-government and proactively communicated will be the hallmark of high-performance governments.

Realizing leadership in customer service: A call for action

Throughout this report, we have proposed that governments need to reform their current eGovernment programs to support a broader vision of leadership in customer service. Governments that embrace the four facets of leadership in customer service will be well on their way to delivering the outcomes their stakeholders desire and to achieving high performance through greater public-sector value.[8]

Here we provide an action plan for government executives to understand what is needed to make a start toward this new vision of leadership, pulling together many of the elements that Accenture believes will help governments achieve high performance.

Building a citizen-centered culture

- Build the ability to harness information across government and organizational silos, which will lead to a common view of the citizen.
- Provide access to this information to the frontline service providers.
- Develop insight into the needs and expectations of citizens and understand the nature of their interactions with government.
- Develop processes that will balance the needs and objectives of the citizen with the policy goals and objectives of government.
- Adjust annual performance management frameworks to tie performance directly to the outcomes government is trying to effect with citizens—not just internal agency and departmental performance targets.
- Develop service offerings that are tied to these citizen outcomes and manage them across agencies, departmental boundaries and jurisdictions—where it makes sense for the citizen.
- Develop capabilities that will allow for customized and tailored service offerings for the citizen and for advising citizens on their particular needs and circumstances.

Governments will achieve leadership in citizen-centered interaction when they succeed in knowing who each citizen is, anticipating their needs and tailoring services to their individual circumstances.

Building cohesive multi-channel service

- Understand current channel usage, citizen preferences and the operational costs of each channel.
- Develop the ability to customize service offerings to the characteristics of specific channels.
- Develop multi-channel service centers with coordination between channels to provide smooth customer service that seems logical and seamless to the citizen.
- Equip service centers with shared capabilities for citizen authentication and registration to provide for seamless service across channels.
- Provide for tiered service levels, allowing citizens to escalate queries and transactions to the appropriate level of knowledge and expertise within minutes—not hours or days.

Governments will achieve leadership in multi-channel service when citizens' interactions with government agencies are fast, efficient and hassle-free, and when citizens get consistent service

[8] The Accenture Public Sector Value Model helps governments define and measure these outcomes. See Appendix A for more information.

through the combination of channels that makes the most sense to them. Governments need to develop the service delivery channels and operational models that are appropriate to each service and that meet the needs of citizens while remaining efficient and cost-effective.

Building cross-government service

- Develop sustainable governance structures that will foster an environment for developing, managing and delivering services across traditional organizational boundaries and across jurisdictions where it makes sense for the citizen.
- Develop effective security procedures for handling personal data and public education initiatives to build confidence in the security and uses of personal data for delivering better service.
- Align public service roles and responsibilities to allow for effective cross-government decision-making, so that organizational lines and structures are invisible to the citizen.
- Develop the means for broader partnerships in the delivery of services, involving intermediaries and third parties where appropriate and effective for both the government and citizens.
- Develop value-added cross-government offerings, beginning with services that require a low level of personal data sharing and moving toward higher levels of cross-government interoperability and information sharing.

Governments will achieve leadership in cross-government service when the services they provide are effectively managed across departmental lines, government structures and other organizations as appropriate so that organizational lines and structure are invisible to the citizen.

Building proactive communication and education capabilities

- Develop a coordinated and cohesive approach across government to informing citizens of the services available to them and of their compliance requirements.
- Link marketing, communication and education activities to both the needs and objectives of the citizen and the policy goals and objectives of the government, allowing the government to influence citizens' behavior in a manner that benefits all parties.
- Link marketing, communication and education activities to the government's multi-channel service strategy, directing citizens to the government's service centers through the most appropriate channels, encouraging more self-service where it makes sense for the citizen.

Governments will achieve leadership in proactive communication when citizens feel informed of new services and capabilities in a consistent and timely manner.

From the citizen's perspective, value from customer service will amount to cohesive responses resulting from a single profile available across all channels, behind-the-scenes collaboration—first within agencies and then across them—to resolve issues, self-service support and 24-hour access. Citizens' interests and welfare will truly be of first importance to the government and citizens will perceive their relationship with the government in that way.

The benefits of leadership in service delivery will accrue to governments as well. For them, realizing this new vision will amount to a truly holistic view of citizens and their intentions both within and across agencies; newly uniform processes and increased data quality and integrity; unprecedented collaboration at the local, regional and national levels; and, ultimately, cost-effective operational models that meet both policy objectives and the needs of citizens in a seamless manner to deliver a significant return on investment.

Pioneering governments will rise to the many challenges they face today by focusing on all facets of leadership in customer service. In the process, they will develop many of the characteristics that will be key to becoming high-performance governments: They will take a citizen-centered perspective, so that they deliver service in terms of the needs, expectations and perceptions of their citizens; they will work collaboratively within and across agencies; they will offer multiple channels of interaction, using innovative technologies to offer unprecedented flexibility to citizens; and they will reach out to their citizens proactively, giving them the tools they need to make full use of the newly enhanced service offerings and so deliver maximum public-sector value.

Country reports

In the country reports that follow, we include each country's ranking (out of 22 countries) and its placement within one of four descriptive categories (trendsetters, challengers, followers or formative), based on its overall maturity. In a number of cases, countries had overall maturity scores within two percentage points of each other. These countries were allocated joint rankings. If a country's ranking is marked as "joint," it means more than one country achieved that ranking.

Trendsetters

Challengers

Followers

Formative

Australia

Ranked 3rd (joint)

Australia's eGovernment vision, Better Services, Better Government, has remained unchanged since it first was introduced in 2002. However, in July 2004 the government also released Australia's Strategic Framework for the Information Economy 2004–06: Opportunities and Challenges for the Information Age, which takes a view more in line with the broader facets of leadership in customer service.

Specific strategies to accomplish the framework's objectives emphasize increased cooperation and coordination among government bodies, including development of governance and business arrangements that promote accountability, efficiency, transparency and integration; development of an Australian government information and communications technology (ICT) investment and interoperability framework to support integrated services; and development of collaborative approaches across government that promote the creation, sharing, protection and accessibility of information and knowledge. Clearly, Australia is making decided moves toward multi-channel coordination across the whole of government.

We expect the framework's emphasis on cross-government, multi-channel service to have a dramatic impact on Australia's future leadership in customer service, as it is in the cross-government interaction area that Australia most needs improvement. While the government ranked 7th in our customer service maturity overall, it ranked only 15th in the cross-government area, with a score of 28 percent. Additionally, citizens' perceptions of how effective the government is at working together are quite poor—only 37 percent of Australian respondents in our citizen survey rated their government as effective in this regard.

The Australian government reached its specific targets for placing services online in 2001, and that achievement is reflected in the government's current service breadth, which stands at 96 percent. One of its most notable accomplishments over the past year was the launch of the new australia.gov.au website in June 2004. The site has been designed to enable users to find Australian government information and services even if they do not know the agency responsible for delivery of the services. It is now engaged in continuous improvement in

government service delivery. It will be interesting to watch whether this induces greater usage of the Internet as a preferred method of government interactions. Currently, telephone is the clearly preferred method of interacting with the government for 47 percent of Australians (as opposed to 19 percent who prefer the Internet or e-mail—multiple responses possible).

To begin to better measure the value of the government's online programs, the Australian Government Information Management Office (AGIMO) delivered demand-and-value assessment methodologies in May 2004. These methodologies provide departments and agencies with easy-to-audit tools for transitioning and extending services into the online environment. The tools align the business case for new online services with the broader budget outcomes and outputs framework and draw on international best practices. Although the methodologies are available free of charge, agencies are required to register to use them. The registration process allows AGIMO to capture and share any improvements made to the product by one agency and better evaluate the take-up and value of the tools to agencies.

Additionally, a recent report by the Australian National Audit Office (ANAO) recommended that while federal agencies should develop sound business cases for delivery of online services, they also need to follow up to demonstrate that online delivery is, in fact, the most efficient channel and that a return on investment has been realized.

Australians in general seem comfortable sharing a wide range of personal information (with the exception of medical records, for which more Australians were uncomfortable sharing than comfortable). Australia did turn some attention to issues of security and privacy in service delivery during 2004, which may help improve citizens' comfort levels. The Strategic Framework document focuses on the importance of privacy and security concerns, with "ensuring the security and interoperability of Australia's information infrastructure and supporting confidence in digital services" as one of the four key strategic priorities. The May 2004 budget allocated AU$50.2 million over four years, across eight agencies, to critical infrastructure protection.

We found little evidence of leading-edge technologies being used at the federal level. However, the Australian government is working toward implementing biometric passports in the future and plans to commit a total of AU$9.7 million in 2004–05 toward their development. Likewise, we saw no evidence of Australia moving to a common approach to identity management across all government services, although several agencies are currently working on identity-management-type solutions. For example, HealthConnect is a current initiative to integrate patient records from hospitals, doctors, surgeries, nursing homes, medical laboratories and pharmacies. This work has the potential to be used to develop an identity management solution across government, if that is the direction the government chooses to go.

Moving forward, the Australian government has begun to lay the groundwork for true leadership in customer service, meaning citizen-centered, multi-channel and interconnected government promoted with proactive communications. For now, the Australian government has a federated approach to information and technology use by government, with agencies largely responsible for determining the appropriate use of ICT. However, the Information Management Strategy Committee (IMSC) and Chief Information Officer Committee (CIOC), supported by AGIMO, have continued to facilitate a whole-of-government focus on key issues associated with the government's use of ICT. Steadily increasing collaboration between agencies and delivery of more integrated and interactive information and services online are marks of the progress achieved and of the type of continued collaboration that will be essential to building the more seamless experience the Australian citizen desires.

Trendsetters

Challengers

Followers

Formative

Belgium

Ranked 14th (joint)

The Belgian government's vision is to make life easier for citizens and enterprises through more efficient government. This vision goes beyond eGovernment alone: Even those who do not wish to use the Internet must be able to enjoy better service delivery.

The Belgian eGovernment strategy for 2005 specifically continues to build on the priorities of focusing on the back office before rolling out new services to citizens. The strategic objectives are to improve public-service delivery for citizens and businesses by making it faster, more convenient, less constraining and more open. The government's basic principles for achieving these objectives directly align with what we have identified as the four facets of leadership in customer service. However, the government has some work to do in terms of implementation. The Belgian government scored just average in overall customer service maturity, with no clear strengths or weaknesses; its scores in the citizen-centered, multi-channel, cross-government and proactive communication areas were all average or just slightly above average.

The citizens of Belgium are among the most enthusiastic users of eGovernment. The country has a relatively high level of enthusiasm for eGovernment and, according to our own citizen survey, has one of the highest percentages of citizens who felt that eGovernment could provide them with better services (77 percent). However, currently, government is not matching citizens' enthusiasm and expectations about the online channel: Only 27 percent of Belgian citizens think their government is doing a good or excellent job with regard to eGovernment. The government has made it clear that online services are simply one more channel to make service delivery easy for the citizens; all channels are considered equal. Overall, the government tries to provide four channels for all services: Internet, telephone, mail and in-person. Given the receptive base, however, the government may do well to concentrate more efforts on improving the online channel, and we saw some evidence of this happening.

For example, so far, 50 percent of the country's administrations have an eGovernment strategy and have begun back-office integration with other administrations. The goal is to have as many administrations as possible follow the national eGovernment strategy and use the technological

building blocks (such as unique identification numbers and the national register) that the national government designs.

Last year, we emphasized the need for Belgium to introduce new methods for improving adoption of online service. State Secretary Vanvelthoven has taken definitive steps to improve online access and Internet penetration. The country's current PC-Privé plan will be replaced by a computer package that will be tax deductible. To push greater access, the secretary has asked the computer and telecommunications sector to provide a complete and affordable package that would include a personal computer, broadband Internet access, an eID card reader and training. This program should prove to be a real boon for Belgian citizens—90 percent of whom expressed the opinion that having the government provide more information on currently available services and how to access them would be useful.

Belgium continues to demonstrate innovation in service delivery. For example, the government ran its "Kafka" program from October 2003 to March 2004. The site has been reopened since early February 2005. Operated jointly by Belgian federal, regional and community authorities, Kafka aims to reduce red tape, over-regulation and bureaucratic complexity across all levels of government. Citizens are encouraged to communicate their views on complex forms, redundant processes, useless regulations and contradictory procedures either through the Kafka.be website or through a toll-free telephone service. The final report was published in May 2004; among the outcomes, a number of further joint initiatives will be taken by the Belgian federal, regional and community authorities in areas such as data sharing and assessment of proposed regulations. So far, 77 projects out of a total of 137 have been realized. The Belgian federal government would now like to extend Kafka to a European Union level. The Belgian and Dutch governments also propose the establishment of a Kafka.eu portal, where businesses and citizens could report on and lodge complains about administrative burdens caused by EU regulations.

On a local level, the Flemish government introduced the Vlaamse Infolijn (Contact Point) system, which is an excellent example of multi-channel service delivery. The system recognizes on what channel a message comes in, knows how to answer the question and allows the contact point to choose to answer via another channel. The Vlaamse Infolijn system also makes use of an *infomobiel*, which is a traveling service bus for outreach to the underprivileged. The civil servants in the bus have access to all the information of the call center in Brussels via satellite connection.

The priorities for Belgium in 2005 include continued rollout of the national eID (described earlier in the innovative practices section), which is expected to be completed in 2009. In the future, citizens and companies may get access to the refuse container park and the library using the eID, and universities may choose to use the eID as identification for their students, as a library pass, as a discount pass for meals on campus, as an entry pass for their parking lots and so on. Companies have expressed interest in using the eID as a completely secure log-in method on their computer networks, and banks want to use the eID as identification for home banking.

Enhancements to the Kruispuntbank Ondernemingen, or Crossroads Bank for Enterprises (CBE), which was successfully launched last year and which allocates each company a single unique identification number, are being made so that by the second quarter of 2005, new companies will be able to begin operations within three business days, rather than the current three months. The CBE is a model of integrating services across multiple agencies. Common data (such as social denomination, commercial denomination, juridical form and address) are centrally stored within the Federal Public Service Economy; all data entered are channeled to and accessible by the appropriate administration, such as finance, social security, health or mobility. The CBE allows (or refuses) access to civil servants or computer programs for the partial data they need.

While Belgium's overall performance this year was not particularly strong, examples such as the eID and the CBE indicate that the country is putting in place the fundamental enablers that will position it for leadership in customer service in future years.

Trendsetters

Challengers

Followers

Formative

Brazil

Ranked 22nd

The Brazilian government is maintaining the main components of its eGovernment vision (with a few minor modifications) first introduced in 1999. Under the direction of Minister José Dirceu de Oliveira e Silva, chief of staff of the Brazilian presidency, the major guidelines of the vision include promoting citizenship, allowing people access to the digital environment, promoting the use of free, open-source software, rationalizing resources and integrating eGovernment within different government levels.

Three initiatives define the implementation of eGovernment in Brazil: the Information Society project, the Transparent Brazil project and Br@sil.gov. These programs share some complementary objectives and have been folded into one overarching program, Portal Brasil. The government expects to implement this new portal by the end of 2005.

Currently, the Brazilian government's online program has the biggest challenge of all the governments we surveyed: The government ranked 22nd out of 22 countries in the service breadth and depth categories, in overall customer service maturity and either 21st or 22nd in all four areas of leadership in customer service (citizen-centered, multi-channel and cross-government service and proactive communications).

Despite its low rankings, a number of Brazil's more innovative eGovernment initiatives have captured the world's attention. For example, its use of electronic voting in the 2003 elections was an enormous success and has garnered interest from a number of other countries. Likewise, 17 countries have expressed interest in Brazil's Bank of Brazil and ComprasNet electronic marketplace portal models.

While the eGovernment vision has not changed drastically since 1999, some of the changes the Brazilian government has made in terms of implementation should make a noticeable impact on at least a few of the dimensions of leadership in customer service. The most notable of these changes include a greater emphasis on improving

the accessibility of eGovernment for the general population and moves to improve interoperability between all public agencies.

For example, the government has revamped its Br@sil.gov program, whose goal it was to pursue a multi-service network operating nationally, supporting various applications, systems and services, and integrating ministries and all the administrative agencies. The program now includes a new interoperability dimension, called e-PING, which defines a minimum set of policies and specifications to regulate the use of information and communication technologies in connection with eGovernment services. e-PING establishes the conditions for interaction with different parts of the government and with society in general and covers interconnection, security, access and organization, and interchange of information. Moreover, the government has plans to launch the Portal Brasil, an institutional portal for government services provision that aims at the unification of all the content currently offered by both the brasil.gov.br and Rede Governo sites.

Moves such as this will be absolutely critical for improving the value of Brazil's service delivery in the future. Brazil was one of the most interesting countries in our own citizen survey. While the country did not fare well in our rankings, we found Brazilian citizens consistently to be the most eager for improved and additional online offerings. For example, 94 percent want more information on currently available online services, 98 percent want other outlets to access government (the highest percentage of all countries surveyed), and 90 percent think it would be useful to have more service available via the Internet. Brazil posted the highest numbers of citizens who are in favor of more education and promotion of online services (92 percent), who think eGovernment makes government more accountable (82 percent), and among the highest who think eGovernment will improve access to services (82 percent) and provide them with better services (86 percent).

Brazilians are willing to make trade-offs for these services, too. The citizens we surveyed were among the most comfortable sharing all types of personal data to ensure better service and were far and away the most willing to have government mandate use of the online channel for certain groups in certain circumstances (87 percent).

The mechanisms government uses to measure its progress are not transparent; we found little published information about the government's self-assessment of its eGovernment performance. We did find evidence, however, of promising adoption of individual services. For example, of the 18.8 million Brazilians who filed income taxes in 2004, 97 percent did so via Brazil's online tax filing service, ReceitaNet. That is a jump from 3.3 percent using the service when it was first introduced in 1991 and 70 percent as of 1998. Today, only 3 percent make tax declarations using a paper-based form.

Results such as this have opened a world of possibilities to the Brazilian government. The government's eGovernment Executive Committee, which is charged with formulating policies, establishing direction and coordinating and articulating the actions of eGovernment implementation, has recognized that the initiatives to extend the services offered through the Internet will have little effect on the population if computer access remains restricted. Today, 90 percent of the population that has access to the Internet belongs to the upper and middle classes. To strengthen its eGovernment program, the Brazilian government has two directions in mind: increasing service offerings to the population and creating a Brazilian program of digital inclusion so that a larger number of people can have access to the Internet.

Brazil's social inclusion program, including its push for open-source technology and free software, should have a positive impact on optimizing service delivery in the future by giving new options to more citizens for fast and efficient service delivery via a range of delivery channel options. Brazil already has a highly receptive base of citizens who seem likely to make the most of what government provides, if given the means and the opportunity.

Trendsetters

Challengers

Followers

Formative

Canada

Ranked 1st

Canada's eGovernment program continues as Government On-Line. The vision remains unchanged since it was first introduced in 1999: Using information and communication technology to enhance Canadians' access to improved client-centered, clustered services, anytime, anywhere and in the official language of their choice.

Since its inception, Government On-Line has logged some impressive accomplishments. Among the more recent: The Canada Site has been redesigned from the perspective of Canadians, with gateways and clusters tailored for businesses, individuals and international clients; the 130 most commonly used services are online; and the Secure Channel—a government-wide service infrastructure that makes secure transactions possible—has been built. It is not surprising, then, that the country ranked number one in overall service maturity this year.

Government On-Line has laid an impressive foundation for service transformation, including many elements of a common infrastructure to support integrated service delivery, a critical mass of online services and trusted identification of clients. Canada is still riding the wave of good work done in the past, but now needs to refocus itself moving forward. The government recognizes that to move to a truly client-centric and whole-of-government approach, and to capture the full benefits and efficiency gains possible, Government On-Line has to be just one part of a larger, cohesive strategy for a knowledge-based economy and society. As Helen McDonald, the acting chief information officer for the Government of Canada, has said: "Government On-Line was a good start, but public servants recognize that it was only a first step. The next and much larger challenge is to fundamentally rethink the way that services are designed and delivered, because that is what it will take to get the dramatic improvements that Canadians expect and deserve. We must take to heart that at the end of the day, there is one government serving one client, one citizen, one taxpayer."

In fact, perhaps more than any other country, Canada has the foundations of leadership in customer service in place. The government scored number one in three of the four areas of customer service maturity. From a practical perspective, Government On-Line and Canada's Service Improvement Initiative are both scheduled to conclude as separate initiatives in 2005, to be replaced with a whole-of-government service transformation agenda. Three service visions—for citizens, for

businesses and for international clients—roll up to one comprehensive vision for government as a whole: Next Generation Public Services. This vision focuses on outcomes in terms of client satisfaction, cost savings and efficiencies, policy outcomes and compliance, and accountability and transparency.

Next Generation Public Services means a multi-channel approach and personalized, two-way relationships. It also means governing service delivery at the enterprise level; having a common view of government business lines and clients; and standardizing business processes and information. Finally, it means having enterprise-wide infrastructure and common enablers to support these other elements. The government has already identified the key enablers of this infrastructure, which include identity management, single authentication, information management, new policies and legislation and enterprise architecture. Working horizontally and vertically will also be a key element of implementation, as will partnerships across government and with the private sector, nongovernmental organizations and volunteer groups.

Elements of the type of collaboration needed can be seen in a number of examples. The Canada Business Service Centres offer the full suite of provincial and federal services to businesses through integrated channels and are extending their reach through syndication of services via third-party intermediaries and associations. The Institute for Citizen-Centred Service, which is supported by the multi-jurisdictional Public Sector Service Delivery Council and the Public Sector CIO Council, works with governments across Canada and around the world to improve citizen satisfaction with public-sector service delivery. Among the institute's most significant initiatives are Citizens First (a biennial national survey of citizen expectations, satisfaction levels and priorities for service improvement at all levels of government); Taking Care of Business (a collaborative effort among more than 20 public-sector organizations across Canada to study government-to-business service delivery from the perspective of the business community); and development of a common measurements tool (CMT) benchmarking database. The institute allows governments to anonymously compare their survey results against peers (www.iccs-isac.org).

In other examples, BizPaL (www.bizpal.ca) is a Web service that gives 24/7 access to permit and license information from all three levels of government simultaneously. Seniorsinfo.ca (www.Seniorsinfo.ca) is a collaborative project between the government of Canada, the province of Ontario and the municipality of Brockville, Ontario, that brings together for the first time information and services that are provided by all three levels of government and certain community-based organizations.

Canadians are among the most connected people in the world. The government's own statistics show that 70 percent use the Internet on a regular basis and 50 percent expect that they will do most of their transactions with the Canadian government over the Internet in the next five years. They also have high expectations, however, and currently they are expressing the opinion that the government needs to expend greater effort in moving beyond plans for integrated services and into implementation. In our citizen survey, only 41 percent of Canadians felt that government services and departments were effective at working together. Citizens want to interact with government the way they interact with businesses, with integrated and seamless service regardless of the channel they choose. In fact, Canada is investigating options for reorganizing service delivery to the customer.

Canada has recently announced plans to create Service Canada, a new whole-of-government service agency, to deliver citizen-centered services and benefits to Canadians through integrated channels. The new agency would bring together many service and benefits delivery operations in areas such as employment benefits payments, pensions and passports, and would eventually include a full range of government services. Service Canada is a significant undertaking and will need to be managed accordingly to deliver on citizen expectations in a timely manner.

It is clear that the foundations for transformed customer services are set, with many initiatives under way. As our citizen survey indicates, however, the Canadian government is not moving at the speed its citizens expect. To progress further toward true leadership in customer service, Canada needs to move more quickly to leverage its gains and achievements to date and accelerate the implementation of the next wave of seamless, multi-jurisdictional service offerings.

Trendsetters

Challengers

Followers

Formative

Denmark

Ranked 3rd (joint)

Denmark was a strong performer this year, ranking 3rd in overall maturity, 4th in service depth and 6th in customer service maturity overall. In February 2004, the Danish government and municipal parties launched a new strategy, Realizing the Potential, for eGovernment for the public sector.

This new strategy plots the country's future course up to 2006. The vision focuses on the role of digitalization in creating an effective and coherent public sector, with a high quality of service and with citizens and businesses in the center. Project eGovernment creates a joint framework and supports crosscutting cooperation, but the responsibility for realizing specific gains obligates individual public authorities to work for the aims of the strategy—across the boundaries of sectors and levels of authority, and throughout the public sector. The hoped-for end result is to reduce the administrative burden and make life simpler for citizens and businesses.

While the Ministries of Finance and of Science, Technology and Innovation have special responsibility for eGovernment, Denmark is making aggressive moves toward cross-agency and cross-government collaboration. High priority is given to promoting cooperation between various government authorities across all levels of government, with a number of authorities working together to create joined-up online services that are responsive to the needs of individuals and businesses. For example, the body with primary responsibility for the general development of the eGovernment program, the Board of eGovernment, is a multi-jurisdictional body appointed by the Danish government, Danish regions, Local Government Denmark (KL), Copenhagen municipality and Frederiksberg municipality. Likewise, the Coordinating Information Committee is also a multi-jurisdictional committee with representatives from the Danish government, the local government and municipalities. This committee is responsible for coordinating the development and implementation of common public IT architecture frameworks, methods, standards and tools. The committee reports to the Board of eGovernment

In fact, Denmark has a history of promoting integrated government; for several years, public authorities in Denmark have joined forces in Servicefællesskaber (Service Communities). These Service Communities ensure that processes are coordinated and optimized across the partners to solve specific tasks and are supported by some degree of digitalization and common ownership of data. The Service Communities can be cross agency, cross government or both.

To facilitate and enable cross-government services, a temporary secretariat for the modernization of law was established (consisting of the Ministries of Justice, of Finance and of Science, Technology and Innovation) to identify and remove all unnecessary barriers for digital communication. The work was done in cooperation with individual ministries. As of this writing, approximately 80 percent of the unnecessary barriers have been removed. The work is being continued, anchored at the Ministry of Finance.

Last year, we wrote of Denmark's first eDay initiative in September 2003, which gave all public authorities in central and local government the right to demand from each other that all nonsensitive written communication be sent electronically. eDay 1 meant savings of €25 million on postage and 300 tons less paper used on a yearly basis. In the Ministry of Finance, the amount of letters sent was reduced by 60 percent and the amount of letters received was reduced by 40 percent. Following up on the success of eDay 1, the Danish government launched eDay 2 in February 2005, which will begin to move all communication, even sensitive information, online. Electronic invoicing is also part of the eDay 2 initiative. The goal is for 40 percent of current letter traffic to be replaced by electronic communications by September 2005.

To continue to move the country online, the government provides digital signatures for citizens and business for free (www.digitalsignatur.dk). The digital signatures already can be used for a variety of services; for example, citizens can use a digital signature to create and edit their curriculum vitae (CV) at the Danish Employment Service's database, www.jobnet.dk. It is also possible for current and former students to use their digital signatures to access information on their student loans, study subsidies and taxes, and to apply electronically for educational grants and student loans. Users can access relevant information from the websites: www.studielaan.dk, www.su.dk and www.tastselv.toldskat.dk with the same log-in.

Danish citizens showed the highest Internet usage of all countries we surveyed, at 82 percent, and the third highest usage of eGovernment (68 percent). They also demonstrated the most balanced usage of channels to interact with the government. However, only 19 percent of respondents think the government is doing a good or excellent job with eGovernment.

The government faces something of an uphill battle in improving citizen perspectives. Overall, Danish citizens seemed lukewarm about potential improvements. Only 44 percent agreed more outlets for access would be useful and just over 50 percent felt additional education would be a help. The existing Internet sophistication of Danish citizens, then, seems both a boon and a bane, as these highly experienced users have higher expectations and will need greater inducement to increase usage of the online channel. One notable area that citizens would like to see improved is the telephone channel. Telephone is the most preferred method of interacting with the government, yet ranked as the least easy to use in Denmark. Additionally, 80 percent of Danish respondents agreed that centralized call centers to direct citizens to the exact service they need would be useful.

Trendsetters

Challengers

Followers

Formative

Finland

Ranked 3rd (joint)

Prime Minister Matti Vanhanen continues to lead and coordinate Finland's Information Society Programme, with assistance from the program director, Katrina Harjuhahto-Madetoja. The plan for this program has not changed materially since last year; it continues to recognize that eGovernment is an important catalyst for cross-government collaboration.

Improving horizontal and vertical cooperation and enhancing services using information and communications technology (ICT) are among the top priorities of the program in 2005. Examples include the creation of a corporate IT governance model for central government to be led by a state CIO. One of the goals of this change is to improve IT effectiveness by avoiding duplication of development efforts and by creating common architectures and platforms to improve the interconnectivity of applications. The other key goal is to enable ICT solutions to provide better customer service.

Service development is also the object of the Julkiset palvelut verkkoon (JUPA), or "public services into Net" initiative. It aims not just to bring current regional and municipal services online, but also to streamline and enhance the processes for both the customer and service providers. The goal is for the customer to be able to choose whichever service channel he or she prefers, with the electronic channel being one among them.

The progress of these initiatives will be worth watching as, currently, Finnish citizens report some dissatisfaction with how well government services and departments work together. According to our citizen survey, only 33 percent of Finnish citizens consider their government to be effective at working together to meet their needs.

Interestingly, although there is no single multi-channel strategy for the Finnish government, the government showed relative strength in the multi-channel area of our customer service maturity scoring, where it ranked 3rd overall. There are currently two ministerial departments with responsibilities in the multi-channel area, the Public Management Department of the Ministry of Finance and the Ministry of Interior. The high

score in this area can partly be attributed to high-quality base registers that contain data used by authorities at all levels, and even by private-sector companies in some cases. Enhancing the joint usage of data in base registers was one of the priorities made by the Ministerial Working Group of the Information Society Programme in their September 2004 meeting. Another key success factor is the widespread use of online banking and a bank-centric payment system: All payments to the government can be done by using online banking.

Finland has the second most-connected population of the 22 countries we surveyed; 79 percent report using the Internet on at least a monthly basis. It also has the highest percentage of regular Internet users who have ever used eGovernment (92 percent). Of these, however, less than half (46 percent) report the government is doing either an "excellent" or "good" job, which may point to the need not so much to improve adoption of the online channel, but to improve the quality of service delivered.

Finland seems ahead of the curve in measuring progress. Its eGovernment progress is measured by tracking what the government calls "impact objectives," which include providing universal access to all information society services as well as access to the necessary skills training. Other impact objectives include making information society services secure and carrying them out within the public sector as joint processes to encourage customer focus and a high level of citizen trust. The first assessment report was published by the Information Society Council in February 2005. It reviews the current information society development and its challenges in Finland as well as outlines actions to address these challenges.

Finland also participates in the eEurope 2005 Program, in which the European Union has its own mechanisms to follow up on the development of the information society at the EU level. Benchmarking for eEurope 2005 is undertaken by the National Statistics Institutes within the member states, although no current survey results were available online at the time of this writing. Finally, Finland also publishes an annual report on the take-up of and channel preference for public online services, including governmental services.

Finland introduced a number of new and innovative services in 2004. One important development is the common authentication platform, tunnistus.fi, developed by the Finnish Tax Agency, Social Security Institute and Ministry of Employment. These authorities will now use the electronic ID system used for Internet banking services for their e-services. For example, the Social Insurance Institution of Finland introduced three new e-services: The customers of student financial aid, maternity benefits and general housing allowance services now can find their own personal records on the Internet. This system uses online banking user IDs and passwords, or the user can use his or her electronic ID card. However, before tunnistus.fi can become a common platform for identification in government, changes in government procurement regulations will be necessary.

To continue to build trust in online services, Finland made some notable changes to how information is managed online in the past year. The Act on the Protection of Privacy in Electronic Communications came into effect in September 2004. The most significant reforms introduced by the act relate to the handling of identification data and geographic information in communications. The act provides clear rules for how identification data will be handled and outlines new methods for fighting spam and viruses.

The basic conditions for future leadership in service delivery in Finland are in excellent shape. The government's online channel is strong, and the country has demonstrated strength in some areas of customer service and in measurement (which will be vital for continuous improvement). Overall, Finland needs to continue to build on its efforts to promote true cross-government collaboration to deliver more seamless service to its sophisticated and discerning customer base.

Trendsetters

Challengers

Followers

Formative

France

Ranked 3rd (joint)

In February 2004, the French government unveiled its action plan for 2004 to 2007, called ADELE (ADministration ELEctronique). The program aims at driving progressive and consistent development of services to better serve citizens, businesses and public servants in a coherent and coordinated way, and at contributing to the modernization of the French government. ADELE constitutes the framework for eGovernment initiatives in different areas, such as the service portfolio for various targeted citizens or public servants, technical infrastructure, interoperability standards, security, smart cards, training programs and partnerships.

No major change in the plan for the development of electronic administration has occurred since last year. The government continued to take action to work toward three high-level intentions communicated by the prime minister: to place the citizen at the center of the "state reform," to promote a culture of change in the public sector and to support technological development for the local authorities. Highlights of the plan for 2005 include developing online personalized services by setting up the site mon.service-public.fr. The French government's continued focus on the citizen is reflected by its relative strength in the citizen-centered area of our customer service maturity scoring, where it ranked 3rd overall.

In addition to its action plan, the French government recently refreshed its Plan Stratégique de l'Administration Electronique (PSAE) for 2004 to 2007. The plan's main aims are to create more eGovernment services that are citizen-focused, personalized, accessible to all and easy-to-use, with simplified and seamless processes and a more responsive administration. The strategy implies far-greater coordination of initiatives across agencies. PSAE is also key to how France will measure its performance going forward, as it directs studies on the government's performance and users' desires regarding electronic administration. The French government is now working on defining the strategic plan for the next three years, which aims at coordinating projects across different levels of administration and consolidating eGovernment services.

The government also continues its work to build an integrated network among administrations. The goal is to break the barriers between government agencies to simplify administrative procedures for citizens and companies. The efforts should be met with enthusiasm. France already has a population that considers its government one of the most effective at working together to meet citizens' needs. According to our citizen survey, 61 percent of respondents felt the French government was either "fairly" or "very" effective in this regard, the third-highest rating of the 22 countries we surveyed.

The French government has made some progress toward offering multi-channel services to businesses and citizens. One of the best examples of this is Allô, Service Public (accessed by dialing 3939), which was extended to the whole country in October 2004. Allô, Service Public makes it possible for any citizen to obtain a response to any administrative request for information in less than three minutes—providing a first level of information and a redirection to the appropriate services if needed (www.adae.gouv.fr/adele/). In another example, France's Impôt service is offered for users to answer questions about tax calculation, payment and control. It is intended primarily for people who cannot contact the tax services during their opening hours. (www.service-public.fr/accueil/impot_impot_service.html). The government has marketing campaigns in place to promote these and other new services. Initiatives such as Allô, Service Public and Impôt service contributed to France's good position in the multi-channel area of our scoring, where it ranked 5th overall.

In the area of security and privacy, ADELE has instituted a new policy that imposes a minimum level of safety for each new online filing transaction for all ministries. This policy, Politique de Référencement Intersectorielle de Sécurité, or PRIS, envisions several possible levels of safety for each component of electronic security, including identification, signature, confidentiality, filing and time-stamping.

Additionally, the Secrétariat-Général de la Défense Nationale (SGDN), in conjunction with the Direction Centrale de la Sécurité des Systèmes d'Information (DCSSI) and the l'Agence pour le Développement de l'Administration Electronique (ADAE), has led an interdepartmental working group on public key infrastructure (PKI) management. The goal of the workgroup is to answer the questions of how to secure information systems weakened by new interdependencies, how to prepare for the interoperability that the concept of PKI supports and how best to share best practices within the administration.

France is making some decided inroads toward implementing electronic voting. Electronic voting was tested during the regional elections that took place in March 2004, with the country's first legally binding electronic election held in the city of Brest. Picking up on this success, 18 communities conducted experiments using three types of voting machines accredited by the Ministry of the Interior during the European elections of June 2004. Some of these experiments where legally binding, while others were not. In another example, from October to November 2004, the country piloted Internet voting for electing the members of the French Chambers of Commerce and Industry (CCI) for the CCI elections in Paris, Grenoble, Bordeaux, Nice and Alençon. Approximately 340,000 company managers and shop owners were each provided with a personal user ID and a password allowing him or her to access the voting website and cast a binding vote.

France has made steady progress by improving its online service breadth—99 percent of the services we evaluated are online in some form. Its online services currently are offered at a depth of 67 percent, which points to room for improvement in the interactive and transactional capabilities of these services. While it has exhibited strength in the citizen-centered (3rd overall), proactive communications (3rd overall) and multi-channel (5th overall) aspects of customer service maturity, additional focus on these areas, and on greater cross-government collaboration, should position it well to be among the world leaders in the near future.

Trendsetters

Challengers

Followers

Formative

Germany

Ranked 10th (joint)

Germany's overall vision for eGovernment has not been reformulated in the past year; however, the focus on integration across all layers of government has been emphasized. As described in our 2004 report, the national BundOnline 2005 vision (under the direction of Dr. Göttrik Wewer, State Secretary, Federal Ministry of the Interior) focused on making federal government services available online. However, this plan was augmented with a Deutschland-Online vision (www.deutschland-online.de), which seeks to integrate portals, provide infrastructure and set standards across all levels of government.

The Deutschland-Online initiative defines a view for a fully integrated eGovernment landscape in Germany, to be created gradually and finalized by 2010. Deutschland-Online emphasizes that transferable best-of-breed solutions for the most significant services should be developed by leading state and local governments and then rolled out across the country. With its decentralized concept and the principle of "Einige für alle" (Some for All), Deutschland-Online wants to become a role model for cooperation on a European level as well. The approach stresses the importance of synergies for eGovernment in a highly federated state and is an interesting, "bottom-up" approach to developing the cross-government service interactions that will be a hallmark of leadership in customer service.

Much is riding on the success of Deutschland-Online. Germany's score in three of the four customer service maturity categories led to a 19th place ranking in customer service maturity overall. In proactive communications, it ranked 18th out of 22 countries and in both cross-government and multi-channel interactions, it ranked 20th out of 22.

Some crosscutting initiatives are already getting under way, thanks to a consensus among heads of government and the Working Group of State Secretaries for eGovernment in the federal government and land governments. For example, the federal government, land governments and municipalities are creating a portal network that offers access to similar online services. Online "responsibility finders" will enable companies and citizens to

quickly find the agency in charge and the relevant eGovernment service. In another example, the federal government, land governments and municipalities are developing a concept to set up clearinghouses for the exchange of data using eGovernment methods.

Aside from the desired internal improvements within public administrations, the key benefits of BundOnline 2005 will come when the online services offered are accepted and used by citizens and businesses. Currently, Germany has some work to do to improve adoption and perception of its online services; according to our citizen survey, only 14 percent of German respondents have used an online channel to contact government over the past 12 months and the very costly in-person channel is still the clearly preferred method of making contact with the government (52 percent preferred, as opposed to 29 percent who prefer the telephone and 11 percent who prefer the Internet or e-mail). Additionally, among Internet users, only 17 percent rated the government as doing a "good" or "excellent" job with regard to eGovernment.

Germany has taken some decided steps to improve adoption of its online channel offerings. The government recognizes the potential to increase awareness of BundOnline 2005 among the general public. To that end, the government launched a broad-based publicity campaign for the first time in 2003 to advertise selected BundOnline services on a larger scale. In addition, a customer survey has been put online on the www.bund.de portal, specifically looking into the benefits for business users and the extent of integration of eGovernment services into business operations. The online survey asks for the opportunity to have qualitative phone interviews for additional follow-up. To build momentum, the government should build on those efforts and continue its outreach over the coming year.

While these marketing and communications efforts are promising, attempts to measure actual adoption rates of different services and tangible benefits seem sporadic. This is a significant marketing opportunity for Germany to seize, as in a number of instances, we found that truly remarkable benefits were realized. The Internet presence of the Federal Customs Administration at www.zoll.de (formerly www.zoll-d.de) is one example of the many information services that yielded substantial benefits a short time after they went online. These benefits consist, among other things, of total savings between November 2002 and June 2003 of approximately €6.7 million. The online site handled queries from its approximately 340,000 visitors every month—queries that otherwise would have needed to be answered by other offices of the customs administration.

Germany is pushing the technology envelope and has implemented a number of cutting-edge projects over the past year. In one multi-channel offering, the Federal Finance Office gives companies the opportunity to verify the validity of the value-added tax (VAT) registration number of a business partner. Of the 15,000 inquiries of this type per month, more than 14,000 are made on the Internet. Now, through a wireless access protocol (WAP) service, this information is available within seconds by mobile phone.

In another example, a large-scale biometric field test, named BioPII, is currently under way at Frankfurt Airport. The project, under the responsibility of the German Federal Office for Information Security, in cooperation with the Federal Police Agency, compares face, iris and fingerprint recognition systems. The performance of all systems, operating in a well-defined environment, is being evaluated in a large-scale user test involving employees of Fraport AG and Lufthansa AG.

Germany's path to future service delivery excellence seems clear. The government has approached having 90 percent of its services online, and these services are rather mature. Germany's service depth was an impressive 73 percent, or 3rd overall. However, the government needs to take strong steps in the direction of improving its customer service maturity, which stands now at only 32 percent (19th overall). Its efforts need to be two-pronged: improving the quality of actual services delivered in all four areas of customer service maturity, and then building adoption of alternative channels to the high-cost face-to-face interactions its citizens currently prefer.

Trendsetters

Challengers

Followers

Formative

Ireland

Ranked 14th (joint)

Ireland's performance in most areas was at the average level of all countries. In customer service maturity, for example, it ranked between 10th and 15th place in all four areas: citizen-centered, multi-channel, cross-government interactions and proactive communications.

The Department of the Taoiseach (Prime Minister) remains the key driving force behind Ireland's eGovernment vision and initiatives. The year 2004 saw the appointment of a new minister of state, Tom Kitt, at the Department of the Taoiseach with responsibility for the Information Society. This department also appoints members of the Information Society Commission, who are tasked with producing plans to bring Ireland into what it terms the Information Age.

Ireland has long had a vision to establish a "Public Services Broker," in essence, an electronic "one-stop shop" where the public can access and apply for a wide range of state services and benefits. The Reach Agency has responsibility for delivering the infra-structure to make the Public Service Broker a reality. The Public Services Broker will be a significant step toward multi-channel, integrated, value-led service delivery in Ireland. Once in place, this framework will provide for access through a single point of contact, delivered through multiple channels and providing protection for personal and business data.

Ireland launched a new action plan for achieving its vision, "New Connections: a Strategy to Realize the Potential of the Information Society, 2nd Progress Report," in April 2004. The report outlines progress achieved over the past 12 months on all aspects (including those beyond eGovernment) of New Connections. As we have seen in other countries, Ireland seems to be changing focus toward putting the enablers in place (including development of the necessary skills among the population) that will ensure a better service experience for citizens.

For example, widespread availability of open-access, affordable, always-on broadband infrastructure for businesses and citizens by 2005 remains the most important aspect of "New Connections." Also key is the focus on developing and deploying the Public

Services Broker platform to support integrated access to all services of central and local government through a single point of contact and through multiple access channels. Other notable components of the strategy that should directly impact Ireland's ability to achieve leadership in customer service for all citizens are a focus on developing the information and communications technology (ICT) skills of the entire populace and ensuring an inclusive information society that addresses disadvantage and exclusion through the development of low-cost Internet service providers (ISP), Web hosting and technical solutions and support for community and voluntary groups, among other initiatives. According to our citizen survey results, approximately 60 percent of Irish adults use the Internet at least monthly, with only 42 percent having ever used eGovernment.

Ireland's Revenue On-line Service (ROS), www.ros.ie, continues to be among the most successful examples of online government. According to the Revenue commissioners in Ireland, by the time of the November 2004 tax deadline for electronic filers, a total of 157,218 income tax returns were filed through ROS (compared to 102,000 for the previous year). Fifty-three percent of timely filers used the electronic route, compared with 40 percent and 9 percent in the previous two years, respectively. Close to 3,000 tax agents or accountants acting on behalf of clients are using the service, and the Revenue commissioners plan to have 75 percent of payments e-filed by the end of 2005.

At present, government departments use several identifiers or codes to identify citizens. The Personal Public Service Number (PPSN), which currently covers approximately 98 percent of the Irish population and will eventually cover all citizens, is now viewed as the unique key to transactions between individuals and a number of government departments and agencies. Current legislation does prevent use of the PPSN by government in some instances. Additionally, the 1998 Social Welfare Act does not allow the use of the PPSN for transactions between citizens and partially private entities. This presents difficulties in the health sector, which deals with a combination of both public and private transactions. Similarly, at present, there is no single unique identifier by which businesses can identify themselves for all eGovernment services.

It will be interesting to watch how the issue of a unique identifier unfolds. Sixty-four percent of Irish respondents reported having had multiple contacts with the government over the past 12 months. However, only 42 percent rated the government as effective at working together to deliver services citizens need. A single unique identifier would be an important foundational element for building a single view of each Irish citizen across the whole of government and improving the government's effectiveness in this regard. Irish citizens already seem amenable to data sharing across agencies if it would lead to better service; in fact, Irish citizens were among the most comfortable in sharing all types of personal data to effect better service for themselves.

Ireland is part of a large group of countries in the middle of our rankings that need to ignite their momentum toward leadership in customer service. For Ireland, despite delays, the Public Services Broker still looks like the key to enabling a whole range of cross-government, citizen-centered services that will lead to a transformation in service delivery.

Trendsetters

Challengers

Followers

Formative

Italy

Ranked 14th (joint)

Italy was one of the lesser performers in the eGovernment aspects of overall service maturity, ranking 20th (out of 22) in service breadth and 18th in service depth. (It should be noted here that eGovernment services in Italy are typically provided at the local level, rather than the national level, as a result of the devolution of power to local authorities.) The country fared markedly better in the customer service scoring, where it ranked in the top 10 in all four aspects of customer service (citizen-centered, multi-channel and cross-government service and proactive communications).

Italy's eGovernment vision, first introduced in 2000, remains in force, with no marked changes. Likewise, no notable changes have been made to the country's action plan. What has changed, however, are Italy's methods for tracking and measuring its eGovernment performance. The Italian government has instituted a number of mechanisms aimed at identifying the tangible benefits of its strategic approach. For example, a Permanent Information Society Observatory has been set up by the Department for Innovation and Technologies and Federcomin (an association representing the information and communications technology, or ICT, industry), with support from IDC and Nielsen Media Research. The Observatory will chart the development of the Information Society in Italy and analyze the demands of businesses, institutions and citizens. The analysis will be made with reference to two areas: ICT use (which will gauge the country's competitiveness) and the development of innovative services. The Observatory's findings to date have been mixed news for Italy. While take-up of basic Internet services (such as broadband) is clearly on the rise in Italy, the use of more sophisticated applications, such as e-procurement, e-commerce and e-learning, is still very limited.

The purpose of the Observatory will be to help orient policies and deliver the data needed to support Italy's international commitment to providing statistical indicators under the eEurope 2005 Action Plan, and the project will be put into effect by means of a statistical information system. Setup of this statis-

tical system should prove invaluable for providing much-needed focus to Italy's eGovernment agenda, which has languished over the past few years. With the system in place, Italy will have the foundation for methodical and reliable benchmarking against other EU member states and against its own performance from year to year. It will also provide a measure of transparency on the government's performance, by making statistics available to both public- and private-sector users in Italy.

In addition to establishing the Permanent Information Society Observatory, the Italian government published a number of reports on aspects of its eGovernment progress. For example, the May 2004 "Statistical Report on the Information Society in Italy" includes quantitative analysis of digital infrastructures and new applications. Additionally, the IT National Authority (CNIPA) publishes detailed annual reports that give a picture of the activities developed during the previous year and the level of innovation in public administration.

Italy has taken some definitive steps to improving the accessibility of its public websites. One piece of legislation, Legge Stanca sull'accessibilità, which came into effect in early January 2004, was enacted to improve the accessibility levels and technical methodologies for verifying website accessibility. In the near future, a special commission will identify key performance indicators to measure progress.

However, Italy seems to be lagging in terms of implementing a defined multi-channel service strategy. There is no one agency responsible for a government-wide multi-channel strategy, nor are there any apparent strategies or plans to encourage citizens to optimize channel usage according to type of service, citizen expectations and channel costs. This is an issue; according to our own citizen survey, Italians prefer costly in-person contacts with their government to Internet contact more than 2.5 to 1. The lack of push toward multi-channel usage can be explained in large part to the continued low Internet penetration in the country. In Italy, personal computer ownership lags far behind televisions and mobile phones, for example, and cost is seen as a prohibitive factor. Our survey also showed that only 58 percent of Italians use the Internet at least monthly. A potential avenue for the government is to offer online access to government services through additional outlets, such as post offices, pharmacies, banks or kiosks in shopping centers. Italian citizens seem not only receptive to this idea, but highly enthusiastic as well.

Italian citizens cannot yet use a single unique identifier for interaction with all eGovernment services, but work is in progress and some local pilots are under way. Citizens seem amenable to sharing all types of personal information to generate a better service experience. The government will need to gather and successfully share this information to build seamless interactions and then promote them aggressively to improve its image among citizens. According to our citizen survey, Italian citizens ranked their government last among all 22 countries in terms of the effectiveness of government services and departments working together to deliver better services for them. Tapping into its citizens' enthusiasm and putting the infrastructural enablers in place to allow for greater interaction among government agencies will be key for the country's future progress toward leadership in customer service.

Trendsetters

Challengers

Followers

Formative

Japan

Ranked 3rd (joint)

Since Japan's plans for electronic government were first announced in the Millennium Project in 1999, eGovernment initiatives have been directed by the e-Japan Strategy, which is the national IT strategy plan. The e-Japan Strategy was updated last year, and presented as the eJapan Strategy II Acceleration Package, which shows the most important next steps for the government to take. Some of the most notable planned actions (with respect to leadership in customer service) include promotion of bilateral and multinational cooperation with other Asian countries, promotion of local electronic government and new technology-enabled methods of soliciting citizen feedback and performance evaluation that incorporates private-sector practices and feeds into continuous improvement.

Additionally, the e-Japan Priority Policy Program for 2004 was defined in June of that year and outlined the policies that needed to be aggressively implemented to ensure Japan met its e-Japan objectives by 2005. Finally, Japan's plan, Program for Building eGovernment, which was also updated in June 2004, consists of the basic eGovernment strategy and action plans to be carried out by all ministries and agencies through the end of 2005.

The goals for Japan are to develop citizen-oriented government service, where people feel safe and comfortable receiving government services and information 24/7 via the Internet and the government portal, and to enable simple and cost-effective government. Japan has a somewhat uphill battle in this regard. In general, Japanese citizens seemed to have a somewhat tepid enthusiasm for the online channel. Only 36 percent of Japanese citizens have ever used eGovernment and only 20 percent think the government is doing a "good" or "excellent" job with regard to eGovernment. Additionally, Japanese citizens prefer the telephone three-to-one over online channels for their interactions with government.

Security and privacy of online information also continue to be of significant concern to Japanese citizens. Our citizen survey showed Japanese citizens were among the least comfortable sharing many different types of personal information across agencies to deliver better service. The government's digital authentication system is underpinned by the

Basic Resident Register Network (Juki Net), a national online database of basic personal information of all residents that was put into full-scale operation last year. The government issues an electronic ID to each resident based on the data in the network, and the ID is stored in the intelligent chip on the resident's Juki Card to "sign" and "seal" electronically for all electronic procedures. Juki Net will be a critical component of Japan's future government online transactions, but is gaining popularity slower than expected, largely due to an unexpected public reception amid concerns over security and privacy.

Japan is turning a greater degree of attention to security and privacy of personal information in 2004–2005. Under the eJapan Strategy II Acceleration Package, new privacy and security issues were raised and proposed actions include appointment of an IT security advisor, strengthening IT security in critical infrastructure and at the local government level, promoting the use of smart cards in passports and for national government employee IDs, and promoting electronic verification of credentials.

Despite the significant concerns, Japanese citizens and businesses currently can conduct a number of secure transactions online. For example, the National Tax Agency expanded its electronic tax filing and payment system across the nation in June 2004, albeit to mixed reviews (filing could be done online, but receipts must still be mailed via regular mail). In another example, in January 2004, the Ministry of Finance began to enable online payments such as permit fees, fines and taxes. The government payment system is connected to a Multipayment Network (MPN), which provides citizens real-time payment service through various channels, such as an ATM, bank or post office, mobile phone or personal computer. The move, which is being promoted as part of Japan's eGovernment program, is expected to reduce the amount of clerical work performed at banks and government offices significantly and is a strong positive step in the direction of building robust multi-channel offerings.

The Japanese government already has put in place many of the pieces needed to build leadership in customer service. In June 2004, the Administrative Evaluation division (under the Ministry of Public Management, Home Affairs and Telecommunications) conducted a survey across all agencies and enterprises to assess online administrative services against the Program for Building eGovernment. The survey reflects our own findings: Japan's online channel demonstrates a very high degree of breadth and depth of service offerings. Despite the high level of offerings, adoption remains an issue in Japan. The convenience of many of the online offerings (including online filing, which is a "flagship" offering for many governments) has been called in to question. Moreover, the Japanese government has not expended much effort in marketing the services, and large segments of the population remain uninformed about how to use the online services or what kind of services are available. Now, the government will have to work hard to overcome negative perceptions and build enthusiasm for a new vision of government-citizen interactions.

Trendsetters

Challengers

Followers

Formative

Malaysia

Ranked 14th (joint)

While there have been no major changes in Malaysia's vision of service delivery since 1997, a number of the government's priorities for 2004–2005 align with the characteristics of leadership in customer service, namely: improving service delivery through increased public-facing and cross-agency initiatives; facilitating sharing of knowledge and experiences by capturing information across government; developing information and communications technology (ICT) skills in the public sector and encouraging an e-enabling culture; and introducing new performance targets for agencies to identify key cross-agency services.

The government emphasizes the effective use of ICT as an enabler to enhance its service delivery to the citizen. As Prime Minister Datuk Seri Abdullah Ahmad Badawi has said, "ICT services providers must cater to both needs [for sophisticated and novice users], particularly the rollout of basic services across the country, to address the question of the digital divide, which is very important issue."[9] This strong emphasis on ICT as an enabler has given rise to a multi-channel strategy implemented by various government agencies through the introduction of online services and linkages to other interagency services. While citizens have the freedom to use any channel provided by the government, the Malaysian Administrative Modernization and Management Planning Unit (MAMPU) encourages the public to use the online and other electronic services to increase the government's efficiency, and the public seems relatively aware of and eager to use these new channels. Malaysia was one of the few countries where we found a very explicit viewpoint on multi-channel service delivery; the IT Strategic Plan released by MAMPU provides detailed guidelines for developing effective channel strategies for all government agencies.

Malaysia is making use of short message service (SMS) for innovative multi-channel service delivery. SMS is being used in the National Service Program; citizens can query whether they have been selected for the program through SMS and get a reply within five seconds. The Royal Malaysian Police (PDRM) has introduced SMS capabilities to provide the public real-time information on traffic summonses. Citizens can now access the information by entering the vehicle registration number and get

[9] ICT Infrastructure Critical for Online Services," *Daily Express*, July 2, 2002. https://www.dunco.com.my/articlearchive18.htm

an immediate response. Finally, mobile phone users in Malaysia can use SMS to verify their voting information. Alternatively, citizens can request that real-time information be sent to their mobile phone, PDA or pager as an e-mail or text message.

Malaysia seems in a stage of formulation—building enabling pieces and priming its public for a future of enhanced government-citizen interactions. The country suffers from very low Internet penetration; only 22 percent of the Malaysian respondents we surveyed used the Internet on an at-least monthly basis and only 29 percent had ever used eGovernment at all. Not surprisingly, Malaysians' preference for the telephone and in-person channels far outranked the Internet by a ratio of 6 to 1.

However, Malaysians were clearly among the most enthusiastic citizens about the work their government was doing in terms of improving service delivery. Malaysians rated their government among the highest in terms of doing a "good" or "excellent" job with respect to eGovernment; 54 percent rated the government this way. They also rated their government second highest in terms of effectiveness at working together to deliver improved services, and were among the most likely to agree that eGovernment increased the government's efficiency, effectiveness and accountability.

The government also has a long-term plan in place for building a knowledge-rich society through its Multimedia Super Corridor (MSC). The MSC is a government-sponsored initiative to create a high-tech business corridor in Malaysia and become a fully developed nation by the year 2020. Specifically, it is a 50-kilometer growth area developed to unlock multimedia's full potential by integrating enabling laws, policies, infrastructure and business incentives in an attractive and eco-friendly environment. It provides an environment designed to stimulate creativity and innovation in technology and attract world-class ICT and multimedia companies. Within the MSC program, a number of highly innovative initiatives have been launched, including the development of cybercities—self-contained intelligent cities that must adhere to certain standards that will keep them on the frontier of technology-enriched living and working conditions.

Another key enabler of the Malaysian government's vision is the public key infrastructure (PKI) that is embedded in MyKad (the national ID smart card) to enable the citizen to perform various secured electronic transactions with the government and the private sector. Using a digital certificate, MyKad users can perform secure transaction and communications through the Internet, with the integrity and authenticity of the information preserved and protected from anyone but the rightful owner of the card. MyKad is the cornerstone of secure transactions with government; approximately 15 million citizens will be using MyKad in 2005 and 200,000 card readers have been deployed to maximize the use of MyKad. MyKad will be integral to transactions ranging from online tax filing to immigration checkpoints to toll payments.

Because MyKad serves as a multi-purpose card for the citizen, the government has put tremendous effort in leveraging the smart-chip technology to deliver its services. A number of innovative services have been introduced, enabled by MyKad. For example, the Employees Provident Fund (EPF) has provided an e-kiosk service machine that enables members who have MyKad to obtain their statement of account through self-service. The statement of account is available only if the member's thumbprint matches the information contained in MyKad. Through this secure and efficient service, members can obtain information within two minutes (as opposed to 10 to 20 minutes currently). Additionally, the National Registration Department is pioneering the use of MyKad for access control at government departments by introducing the system at its new office in Putrajaya.

Looking ahead, Malaysia's revised myGov portal (www.gov.my) was launched in November 2004. The new portal captures vital personal information from its members (such as gender and age), and it is expected that when phase 2 of the public service portal is complete in June 2005, the government will be able to use this information to perform segmentation and profiling of its portal members for further analysis and, ultimately, enhanced service delivery.

Although Malaysia has clear room for improving its current service offerings, not only in eGovernment alone, but in all four aspects of true customer service maturity, the government's current innovative initiatives and citizens' clear enthusiasm point to a decided energy within the country that could provide strong momentum for future gains.

Trendsetters

Challengers

Followers

Formative

Mexico

Ranked 14th (joint)

Javier Pérez Mazatán is new to his leadership role of the Mexican government's e-Mexico program, which is a series of initiatives intended to develop and foster an internal market for information and communications technology products, promote the use of electronic media and e-commerce, and digitize government services. The e-Mexico program includes eGovernment (which remains the responsibility of Abraham Sotelo) as one of its four major components, with the mission of developing government electronic systems for improving service quality, efficiency, effectiveness and transparency (www.gob.mx).

While there have been no major changes to the e-Mexico plan, there were several notable additions last year. In previous years, the focus had been on connectivity and online content, but for 2005 to 2006 the focus seems to have shifted largely to enabling infrastructures. In particular, the e-Mexico priorities for the year include developing the e-Mexico datacenter to host all of the e-Mexico capabilities, developing the digital services platform to host the different Web services developed within the Secretariats and implementing the government intranet to improve the collaboration capabilities within the federal government. Other key topics of the vision include growing the eGovernment capabilities of state and county governments.

All of this legwork will be critical for Mexico, which has been playing catch-up to a number of countries in building online access for its citizens and developing robust services. The government has made considerable strides over the past few years in this area; however, our survey showed that citizens still prefer the in-person channel to the Internet 4 to 1. The telephone is also popular, although Mexican citizens expressed a decided enthusiasm for improving this channel; 91 percent of Mexican respondents in our citizen survey agreed that centralized call centers to direct them to the exact service they need would be useful.

To monitor and measure its progress, the eGovernment office continues to develop its project management system and to develop a number of key performance indicators and metrics to manage and evaluate its eGovernment projects. In addition, there are several committees that

evaluate the different eGovernment initiatives. These committees make a detailed follow-up of different projects using performance management indicator guidelines and best practices.

Additionally, the e-Mexico office has conducted usability studies and impact analysis of the principal portals included in the e-Mexico websites and developed benchmarks to compare their initiatives and capabilities against the top performers. The e-Mexico office then uses the results of these studies and benchmarks to make improvements in the design and approach of the different portals within the e-Mexico platform. Structured performance management schemes such as these will be vital for the country's continued improvement and greater delivery of outcomes that matter.

Despite the country's low Internet penetration, Mexico has a number of examples of local governments reaching out to citizens in innovative ways. In the state of Puebla, for example, Governor Melquíades Morales Flores implemented kiosks of universal services for citizens. Among other services, these kiosks allow citizens to get copies of birth, death and marriage certificates; to consult the Public Registry of Property and Commerce; and to answer notifications from the Superior Court of Justice. The kiosks allow the citizen to obtain needed documents, without the intervention of a civil service employee.

On a more general level, the government has relied on intermediaries for the delivery of public-sector services to make eGovernment accessible to a larger number of users. Typically, these intermediaries include banks and supermarkets, where citizens can perform a range of transactions, including paying taxes and other fees.

The Mexican government has begun enabling citizens/businesses to make secure electronic transactions. In one notable example, within the Tax Administration System (e-SAT), the confidential electronic identification code (CIEC) is an electronic sign used for sending the tax declaration by the Tax Administration's website. In May 2004 the Tax Administration System also began offering an electronic invoicing service, for which an electronic signature is required (www.sat.gob.mx/nuevo.html).

Also on the near horizon is the widespread implementation of the Unique Registry of Accredited People (RUPA), which will interconnect multiple registries of people and businesses and allow individuals or business to conduct transactions across multiple, decentralized entities through a unique identification number. RUPA is expected to be implemented by the end of 2005 and should lead to significant cost savings and an improved customer experience for many professionals.

While infrastructural enablers such as these will be valuable for building citizen-centered and cross-government interactions, they will not be the complete solution. Concerns about protecting information privacy appear to be a considerable issue in Mexico. Our citizen survey showed that Mexican citizens, as a rule, were not comfortable sharing many different types of personal information—even if it would lead to better service. Beyond the most basic identification information, such as name, birth date, marital status and education, citizens seem reluctant to have their personal information shared widely. While the Mexican government continues to build a strong foundation for leadership in customer service, it will also need to work hard to develop a level of assurance among citizens that the next-generation services it offers are safe to use.

Trendsetters

Challengers

Followers

Formative

The Netherlands

Ranked 10th (joint)

The Netherlands' strengths are in its citizen-centered focus and its broad range of available online services. Most ministries undertake eGovernment initiatives, while multiple ministries manage the eGovernment vision. To overcome the lack of integration in eGovernment initiatives, a key focus for this year is to combine forces between the different eGovernment programs across ministries to improve services and processes for citizens and businesses.

Early in 2004, the government started a new program called Andere Overheid (Different Government), which outlines the path along which government should be modernized, and emphasizes fewer rules and regulations to encourage creativity and initiative among citizens and businesses. It also emphasizes improving government services through cooperation and shared responsibility with other entities. In addition to Andere Overheid, the Rijksbrede ICT Agenda (Nationwide ICT Agenda) is renewed every year, aiming to improve overall productivity, public-sector innovation and participation of civilians.

How well the Netherlands is able to foster collaboration for more seamless service delivery will be worth watching, as our study shows that the Netherlands' ability to offer cross-government services is clearly the area most needing improvement. The government ranked 16th (out of 22) on this measure overall. More important, however, are the citizens' perceptions: Dutch citizens were negative overall in their impression of how well their government was doing in terms of working together to deliver better service, with more citizens saying the government was ineffective than effective.

For the past few years, the Dutch government has worked toward a central infrastructure for commodity services, such as security and the exchange of transactional information, and some significant improvements were made to the security and privacy of its transactions over the last year. Use of the public key infrastructure (PKI) for the government, which has been operational since December 2002, is growing. In addition, a single uniform authorization system for authentication of citizens (DigiD) was launched in January 2005. All government-to-citizen

services are to implement DigiD and in the future it will contain no more than three layers of security: the high security level, providing an electronic signature; the medium security level, in line with the current tools used for Internet banking; and the (already operational) basic security level, requiring an identification number and/or password.

Concerning the distribution of information to citizens and companies, the Dutch government remains strongly interested in developing integrated and seamless service delivery. It is currently restructuring its public relations capability to link various types of information and services to create a single, all-embracing government information point, without having to reorganize all the underlying administrative organization. The Ministry of Internal Affairs has created the InAxis committee to support innovation in public-sector organizations, which should lead to better service to the citizen and higher efficiency. The focus is on shared services, value chains and other forms of cooperation.

We found several examples this year of innovative technology being used to open new channels of interaction with the Dutch government. In November 2004, the first digitally submitted construction license was approved, within the framework of the project Central Server Construction Applications. Using this program, an applicant can submit construction plans and associated materials and drawings digitally. Additional documents are digitally produced and stored on the server and an applicant can be informed about the status of an application by short message service (SMS) or e-mail. Initiatives like these will be important, as the Netherlands' performance in multi-channel interactions placed it at only 15th in the rankings for that area.

In another example, in the spring of 2005 the city of Rotterdam will start to use chip cards for electronic payments for all its public transport in the region. Travelers will pay for train, bus and subway after arriving at the destination of their journey. The system seamlessly calculates the fare based upon departure location and types of transport. It is expected the system will be implemented nationally by 2008.

Additionally, in January 2005 it became mandatory for companies in the Netherlands to file VAT and income tax applications electronically. This is the first step toward completely removing the paper trail in the tax process—as the government has decided that all private and corporate taxpayers are to file their tax applications electronically by 2008.

The Netherlands already delivers a broad range of electronic services with a relatively strong customer focus. Looking forward to even greater gains in customer service maturity, the Netherlands needs to focus on developing true cross-government interactions and to encouraging greater usage of more cost-effective channels. Powerful management of the program and initiatives is critical at this stage. The right governance and focus will provide early benefits and certainly will lead to a more positive perception among the country's highly experienced and sophisticated base of online users.

Trendsetters

Challengers

Followers

Formative

Norway

Ranked 3rd (joint)

The newly created Ministry of Modernization under Minister Morten A. Meyer took over responsibility for coordinating Norway's IT policy in June 2004. Norway has not updated its eNorge vision during the past year, but a new eNorge plan is expected in the spring of 2005.

While the plan has not yet been released, the Norwegian government has already publicized its priorities for 2005. A number of these, if seen to fruition, will be a strong impetus in Norway's push for leadership in customer service, namely: one public portal for citizens, Min side (My site), which will give citizens access to available digital public services irrespective of government level and sector. This "virtual service center" is expected to be launched in 2005 and the structure of the content will be "life situation based." The portal will give citizens access to tax information and status on applications. It will also be possible to receive prescriptions and drivers' licenses and to order passports and visas. For the portal to work, however, there will need to be a significantly increased focus on electronic workflow across agencies and across government. Min side has been called the most ambitious portal project in the world; the government estimates that the project will take three to four years before all services will be available. Once the portal is operational, the impact on Norway's ability to deliver citizen-centered, cross-government services should be decidedly positive.

Other key initiatives in 2005 include creation of the framework agreements for digital signatures. The government has recently decided on specifications for digital signature solutions. Vendors that fulfill the specifications will be allowed to deliver digital signature solutions to be used for public digital services.

Finally, the Norwegian government has committed to the continuation of Høykom (Norway's support program for broadband) for three more years and a program of "digital competence for all."

Despite several pilot projects and entry into a major framework agreement for digital signatures in the health network, extensive use of digital signatures in Norway is still on hold. There are still very few large-scale applications of public key infrastructure (PKI) that involve end users. One notable exception is the State Educational Loan Fund, which provides grants and loans to pupils in upper secondary schools and to university and college students, using

the portal AltInn. The State Educational Loan Fund is the first Norwegian public authority to introduce a complete electronic solution using a digital signature. In November 2004, students from selected institutions were able to handle all transactions with the State Educational Loan Fund electronically. The plan is to offer the service to all students in 2005.

Norway's performance in the multi-channel service delivery area of our customer service scoring put it firmly in the middle of our rankings for that area (10th place). The government continues to develop innovative service applications on alternate channels to the Internet, however, and we expect it will advance appreciably in the near future. For example, the Directorate of Taxes has begun to offer new services via short message service (SMS). Among the most recent services added, citizens can get copies of *skattekort*, a card stating the rate at which earnings are taxable and showing deductions from taxable income, as well as getting a form to change *skattekort*.

A number of the multi-channel services we saw were offered at a local level. For example, in Oslo, it is possible to obtain a change-of-address form via SMS. In another pilot project in a municipality in Norway, relatives of chronically ill people can get in contact with other relatives and health care staff using provided personal computers, the Internet and picture phones.

Norway has a large percentage of regular Internet users (77 percent access the Internet at least monthly, according to our citizen survey). However, other (more costly) channels of interaction with the government are clearly preferred: telephone by a margin of 3 to 1 and in-person by a margin of 2 to 1.

The Norwegian population is increasingly acquiring the broadband capabilities that will allow them far greater ease of access to government services. According to Statistics Norway, by the end of 2003 the number of broadband subscriptions in Norway roughly amounted to 347,000—an increase of almost 123 percent over the end of 2002. Nearly 312,000 of these subscriptions are private ones, representing a 123 percent increase over the previous year.

Meanwhile, the number of business Internet subscriptions was almost doubled. We expect this growth will naturally lead to a continued upswing in adoption of multi-channel government and its associated benefits. However, Norway's efforts to measure the benefits of its online service delivery hit a bump last year when a planned project by the Ministry of Modernization to measure the tangible benefits of eGovernment in 2004 was postponed due to lack of resources.

Putting a consistent measurement scheme in place will be vital for Norway's service delivery future. Currently, only 13 percent of Norwegians rate the job their government is doing with regard to online service as "good" or "excellent." Norwegians have a high level of online sophistication and their extensive experience is likely to have bred expectations much higher than in other countries. The Norwegian government is taking truly important steps to position the government for rapid advancement in service delivery, but it needs to develop a clear understanding of its citizens' expectations. Then, it needs to deliver the outcomes citizens value and make their continued investments worthwhile by leading to an optimal balance of channel usage and more satisfied citizens.

Trendsetters

Challengers

Followers

Formative

Portugal

Ranked 20th

Portugal is in a formative stage with regard to leadership in customer service, with comparatively low scores in both service maturity and customer service maturity (and a ranking of 20 out of 22 in both of these areas).

The Mission Unit for Innovation and Knowledge (UMIC), which recently changed from a temporary structure to a permanent organization, remains responsible for promoting the information society, eGovernment and innovation, as well as for executing the programs in these areas. After the general elections that took place in February 2005, a new government is in place and as of this writing, it is not possible to anticipate any impacts on eGovernment policies.

Among the most notable recent accomplishments of Portugal's eGovernment program was the new citizen portal, www.portaldocidadao.pt, which was launched in March 2004. Since then, the portal back-office has been developed to facilitate stronger involvement from content and service providers; and major projects were recently launched to develop integration and interoperability capabilities as well as to reengineer some critical processes in order to provide them online. In 2004, the Public Administration was allowed for the first time to conduct procurement via the Internet in a few pilot projects—all of which yielded some savings.

Also notable in 2004: The online knowledge library b-on (www.b-on.pt) was launched in April. B-on gives complete access to the contents of approximately 12,500 scientific publications to the entire academic and scientific community. In the first six months, b-on received more than one million downloads. Finally, pilot projects for electronic voting were conducted in June 2004 and February 2005, the most recent including an experiment of Internet remote voting for people living abroad.

Despite Portugal's slow progress overall, the country did introduce a number of innovative services using new technologies. The Campus Virtuais (Virtual Campus) project was designed for the creation of

online university services, production and sharing of academic content and the establishment of university communities. Within Campus Virtuais, students have access to classes, articles, student papers, grades, bookshops and academic administrative services online, as well as access to the Internet through a broadband wireless LAN. Everything is available via a laptop from any point within the university campus (www.e-u.pt/english/index.asp).

Portugal has already begun to enable some secure electronic transactions. In the public discourse, the government encourages citizens and businesses to use these services, yet also admits that it must lead the way. A few agencies are at the forefront of the government's effort. For example, the Portuguese Revenue Agency offers an online identification process, where citizens have to apply for a voucher (with a password) that will be sent to their home address. It has already achieved some impressive numbers in terms of the adoption of its electronic services by citizens and businesses: Approximately 24 percent of all individual income tax returns and almost 100 percent of all corporate tax returns were submitted online in 2004. The Social Security agency has also arranged a similar alternative online identification process, while the Chamber for Lawyers and Solicitors already accepts digital certificates online for use in transactions with legal and justice institutions. The planned government gateway is expected to integrate these multiple forms of authentication, but that occurrence is still a long way off.

The Portuguese government has undertaken to measure the tangible benefits of its eGovernment program through a number of means. The POS-Conhecimento, which organizes European Union structural funds for information society projects, has assumed the role of disseminating good practices in this area, and when receiving candidates for new projects, tries to determine if the project is sustainable and what kind of return on investment it will have. The government's efforts to share best practices and measure the value of its eGovernment program are a positive step toward better targeting its efforts and investments in general.

The government's service mission, vision and action plan have changed little since our last report. Keeping the seven main action points from last year, the government's goals continue to be better public services, reduced bureaucracy, greater initiative and technological innovation, stronger and more participative communities and more effective citizens. However, more explicit references can now be found regarding the development of greater coordination across government and providing multiple channels of access as part of a larger framework of citizen-centered service. For example, the Portuguese government plans to promote the Rede Nacional Integrada de Serviços Públicos (National Integrated Public Services Network), a network intended to give single-point-of-access to a variety of services through different channels that are already familiar to citizens. Included are megastores and convenience stores, as well as self-service digital phone-channels with service access via personal computers, personal digital assistants (PDAs), mobile phones and public access stations. To accomplish this goal, however, true synergies will need to arise between local, public and private entities—something which is likely still far on the horizon.

Portugal still struggles with relatively low Internet use—only 43 percent of the citizens we surveyed were regular Internet users. Not surprisingly, their preference for in-person interactions with the government was clear. According to our citizen survey, 60 percent prefer in-person interactions, compared to 19 percent who prefer to use the Internet. Despite this preference, the Portuguese citizens in our citizen survey were among the most eager for innovative advances in service delivery. Across the board, Portuguese citizens expressed decided enthusiasm for additional outlets (such as post offices, kiosks and walk-in centers) to access government. Citizens also overwhelmingly think centralized call centers are a good idea and they want more services made available via the Internet. Finally, 95 percent of Portuguese citizens felt it would be useful to have more information on currently available services and how to access them—a statistic of note for the government, which ranked 20th out of 22 countries in our proactive communications scoring this year.

Trendsetters

Challengers

Followers

Formative

Singapore

Ranked 3rd (joint)

Singapore was a strong performer this year, ranking 8th overall in our service maturity scores and 3rd overall in customer service maturity. The government's strong performance in all four dimensions was notable: 6th in cross-government, 4th in citizen-centered interactions, 2nd in proactive communications and 1st in multi-channel interactions.

The government launched its unified, 24/7 gateway to all government services and information, Singapore Government Online (www.gov.sg), in October 2004. In conjunction with this launch, the eCitizen Portal (www.ecitizen.gov.sg) was also streamlined. Clearly, these two initiatives had a strong positive impact on Singapore's performance in the multi-channel and cross-government areas. Looking ahead, Singapore's focus will be on opportunities to collaborate with the private sector in delivering end-to-end services for the convenience of government's customers. For 2005–2006, one of the most notable initiatives will be exploring and implementing what Singapore calls Public-Private-People Integration, or 3PI. The idea behind 3PI is that citizens and businesses want "total service delivery," where their needs are satisfied without their having to deal separately with different sectors.

Through the cross-boundary integration of people with private and public services, Singapore's aim is to provide a totality of services to the user. 3PI goes beyond government; agencies will be challenged to look actively for service integration opportunities from a customer's perspective—to "start with the user in mind"—which is a fundamental component of citizen-centered service delivery. This is a real shift in mindset. Some of the cross-agency collaborations that have been identified include a one-stop application for public works (water, sewage, electricity and gas work) involving seven agencies. The government will continue to look for interagency collaborations and facilitate knowledge sharing that can help improve services.

In addition, the Service-Wide Technical Architecture (SWTA) is a technical framework comprising standards, policies and guidelines that helps agencies in the design, acquisition and management of information and communications technology (ICT) systems, and facilitates interoperability at the infrastructure layer. Most public-sector agencies have developed agencywide technical architectures aligned with SWTA to manage their ICT implementations.

While Singapore has a broad multi-channel approach (counter, self-help kiosks, Internet, mobile phone and intermediaries) to deliver government services depending on customer segments, Singapore's position is to push for electronic means as the preferred channel as far as possible. Aside from traditional media campaigns, the government is introducing self-service terminals at all government agencies so that customers can transact online themselves or with initial help from the agencies' staff. To date, there are about 1,000 self-service terminals at 36 agency sites, which have resulted in a gradual reduction in the number of service counters. For specific seasonal events, such as tax filing, the agencies in charge typically arrange for special roadshows and events equipped with volunteers to help people use the online services. As a result, Inland Revenue Authority of Singapore (IRAS) achieved a usage rate of about 70 percent electronically. The younger generation is also introduced to government e-services as part of the school syllabus.

These efforts are paying off—in our citizen survey, Singaporean citizens clearly were the most positive about the job their government is doing. Singaporeans expressed the highest satisfaction with the job their government is doing with regard to eGovernment (65 percent say "good" or "excellent") and rated their government number one among 22 countries in effectiveness at working together to deliver services. Likewise, Singaporeans were among the most positive in their attitudes about whether eGovernment makes government more efficient, effective and accountable and provides better service. This positive attitude is translating into real use of the online channels provided to them: Singaporeans were the most likely to express a preference for using the Internet to interact with government (with 28 percent preferring this channel). Their positive experiences to date are most likely a significant factor in Singaporeans' notable willingness to share all types of personal information among government departments to receive better service.

Singapore has among the more mature approaches to measuring its progress. Aside from its disciplined approach to measuring adoption of the online channels for specific services, new tools such as online polls and customer e-ratings have been implemented to get more quantitative and qualitative feedback and customer insights when they are using specific online services.

During the last year, there was an eight-fold increase in the number of subscribers to My.eCitizen (from 2,500 in November 2003 to 20,000 in November 2004). The enhanced My.eCitizen portal (http://my.ecitizen.gov.sg) allows users to customize their home page and receive personalized alerts via short message service (SMS) and e-mail. This increase shows how efforts to enhance the usability of e-services help to increase the adoption rate.

As far as possible, government electronic services have been redesigned or streamlined so as not to depend on highly secure authentication. For most of the government services, no authentication is required. Where it is required, single-factor authentication with a user ID and password is normally sufficient, although two-factor authentication is used on a limited basis as well. The Singapore government uses SingPass, which is an end-to-end encrypted single factor authentication to all government e-services. As of April 2004, about 600,000 SingPass IDs had been issued and the transaction volume averaged 500,000 per month.

Online payment is one of the main areas of security concern. To address this security concern, FlexiPay, a new Internet e-payment mode that uses the existing interbank payment infrastructure (GIRO), was launched in February 2004. Payments made through FlexiPay can only be deposited into the government's bank account. In addition, only one Direct Debit Authorization (DDA) form need be signed to authorize deduction from a customer's bank account to any government agency. The concept of "sign once, pay many government agencies" on a needs basis limits the risk, as payments can only be made to government agencies upon authorization by the payee.

Singapore has been an eGovernment powerhouse for many years, and its efforts have resulted in a highly enthusiastic population and a strong foundation for future leadership in customer service. Given the relatively equal emphasis on all four areas of customer service maturity, Singapore seems poised to claim a world-leading position in the new vision of value in service delivery in the near future.

Trendsetters

Challengers

Followers

Formative

South Africa

Ranked 21st

South Africa's service delivery strategy is currently under review by the country's governance and administrative cluster. No one individual or department has sole responsibility for implementing or overseeing the country's strategy; transforming service delivery in the country is the purview of individuals at the political level, the administrative level and the technical (information and communications technology, or ICT, delivery) level alike. The government is in its initial steps toward leadership in customer service, with clear room for growth in both eGovernment and overall customer service maturity. The government ranked 21st out of 22 countries in service breadth, depth and customer service maturity.

While the country's eGovernment vision has not yet been updated, the government has made some notable changes to its action plan over the last year. The government's current plans include revamping the eGovernment portal to improve public access to government services, through public information terminals in post offices and multi-purpose community centers, and to provide streamlined government services online. While Phase 1 of the strategy was to create a comprehensive catalog of online services and information, Phase 2 will be about evolving each service to present government as a single entity to consumers of its services, organize services around the convenience of citizens (24/7 and multi-channel) and make government services accessible to all. In South Africa's favor, the national government already delivers services in clusters and several bodies exist to promote cooperation across government. In fact, a bill to establish a framework for intergovernmental relations with respect to assignment of roles and functions is now under review. Once in place, this framework should be a key enabler of more integrated services.

The country's historically low Internet penetration rate has forced the government to investigate additional ways of making online access to government services a reality for large segments of its population. To this end, the government has recognized the need to collaborate with the private sector to achieve its eGovernment vision. For example, the Center for Public Services Innovation (CPSI), the

agency focused on multi-channel access and eGovernment, initiated the eGovernment Knowledge Exchange to foster a culture of knowledge sharing between and among government departments and between government departments and the private sector.

In addition, there has been a renewed effort to involve the public in initiatives for service delivery—through efforts such as the Multi-Purpose Community Centers (MPCCs). MPCCs are cooperative efforts among all three levels (national, provincial and municipal) of government as well as non-governmental organizations. MPCCs provide access to eGovernment services to citizens who might otherwise be unable to make use of the portal.

In his State of the Nation address in February 2005, President Mbeki stated the following: "We have launched the Batho Pele Gateway to afford citizens the platform to access information and, later, services by electronic means. Over 65 Multi-Purpose Community Centers have been launched, and by the second half of this year, each district and metropolitan council will have its own center. Plans have been approved for the construction of hundreds more such centers, so that by the end of the decade, each municipality would have a one-stop government hub."

In addition, the president stated that by June 2005 "the plan to improve monitoring and evaluation across government, including the electronic information management system, will have been completed for phased implementation."

These plans point to a positive movement in the direction of leadership in customer service for the country, which has struggled in years past to develop a meaningful online program. Initiatives such as these will be critical for improving the value delivered to citizens. Our citizen research showed that South Africans are keen for additional means of access to online services: 90 percent felt access points in post offices, banks and the like would be useful; 84 percent felt kiosks would be useful; and 84 percent felt government walk-in centers would be useful. Providing additional points of access would go a long way to boosting public-sector value.

While South Africa's Internet usage remains relatively low, the government has put into effect a number of significant enablers that should foster adoption of the Internet as a preferred channel for government interactions. Namely, South Africa's Electronic Communications and Transactions (ECT) Act is a comprehensive piece of legislation that covers topics ranging from eGovernment to legal requirements for data messages (including e-mail and short message service, or SMS) to online consumer protection and cyber crimes.

The South African Revenue Service (SARS) has seen a 400 percent growth in electronic filing over the past year and plans to launch mobile services aimed at the lower income tax group in order to ease the payments of refunds to these groups. South Africa has 25 million mobile phones, out of a population of 44 million, making them an excellent channel for government-to-citizen interaction.

In another example of the critical enablers being put into place, South Africa has begun to make moves to enable secure online transactions through the use of digital certificates. The South African Post Office (SAPO), for example, has already implemented a "trust center" environment using locally developed public key infrastructure (PKI) to take advantage of its large physical presence across the country and its "preferred authentication service provider" status conferred by the ECT Act.

The government is currently making moves toward a single unique identifier for its citizens, contained on a smart card. South Africans could start being issued these new smart ID cards by the end of this year (2005), which could provide tremendous impetus to the government's program of online service delivery.

The South African government seems to understand the severe constraints on its ability to deliver value resulting from its citizens' limited access to multiple channels. To make meaningful progress in the future, the government will need to focus its efforts on its initiatives to expand service access. Then, it must encourage citizen usage to gain traction for its programs and build a much broader base of connected citizens.

Trendsetters

Challengers

Followers

Formative

Spain

Ranked 14th (joint)

Spain's government transitioned to a new administration in 2004, with a corresponding change in leaders of the country's online program. The Ministry of Public Administration, now headed by Jordi Sevilla, has charge of the program and a new vision is being crafted (at the time of this writing) for 2005.

This plan, Plan Conecta, will be the Spanish government's overarching strategy for moving to interconnected, multi-channel government. Four main channels are the focus of the plan: the Web channel (www.ciudadano.es); the telephone channel, with a planned single customer contact call number called the Unified Attention Number (111); the mobile channel, using the short message service (or SMS) and multimedia messaging service (or MMS) platforms; and physical (in-person) presence. Plan Conecta also calls for greater collaboration across government entities to deliver integrated services to the citizen, particularly through the ciudadano.es portal. The National Commission for Cooperation between Public Administrations (COAXI) is the entity responsible for cross-agency and cross-government collaboration.

The current plan makes €84 million available for modernizing public administrations up to 2007 and comprises 43 projects, grouped according to five principle guidelines: certifica (designed to eliminate 80 percent of the certificates demanded by the administration); eDNI (implementation of a national ID card, with projects including a common platform for signature validation and single identification); Ciudadano.es (refinement of the citizen portal); simplifica (designed to rationalize public management, make it more efficient and reduce costs and response times); and MAP.es (designed to unify and improve central government Web pages).

Despite the fact that Spain's future plans for service delivery continue under construction, the country has begun to make significant headway in enabling secure government online transactions. Through the citizen portal, citizens can go to the Web page of the CERES Project, led by the Spanish Mint as the public certification authority. There, citizens can see a list of services that require a digital signature. To date, the Spanish Mint has authorized 610,000 electronic certificate users. To address the significant privacy and security concerns of the Spanish public, a new law governing the use of electronic signatures was published on December 20, 2003.

Spanish citizens show a clear preference for in-person interactions with the government. This is not surprising, given the country's relatively low base of regular Internet users. Despite this fact, however, adoption of the online channel is gaining momentum in some areas, as shown by the statistics the Spanish government makes available. For example, the Spanish Social Security reports that more than 95 percent of affiliation (40.4 million transactions annually) and collection (16 million declarations transmitted annually) procedures have been done via online channels, dramatically increasing the quality of service provided to the citizens. In another example, during 2004, the Land Registry registered 800,000 urban real estate transactions through the Internet, or 45.7 percent of the total.

The year 2004 saw the examination of a number of technologies to enable viable channel options. Among the most significant, the Tax Administration allowed citizens to confirm the draft of their income tax returns via short message service (SMS). On the horizon, the Ministry of the Interior announced a pilot of electronic ID cards that will start in 2006, with a planned launch in late 2007 or early 2008.

Likewise, the Ministry of Defense is working to implement approximately 25,000 electronic ID cards as well. Spain also piloted electronic voting for a number of elections, including the general elections and voting in the Civil Guard on October 2004 to elect the representatives of the Advisory Board. The country is also working on biometric technologies for use in passports.

The Spanish government currently does not publish many statistics related to its progress; however, the government does plan to create new oversight for the "electronic administration" in the form of an "Observatory" expected to be operational by September 2006.

The Spanish government has an enthusiastic population eager for additional services and channel options. In our citizen survey, Spaniards were united in expressing a desire for additional avenues of access to government services (including more government outlets, centralized call centers and kiosks). Perhaps even more significant, however, is the overwhelming interest in receiving more information and education on available services and how to access them. In fact, Spaniards were the most desirous of more public education and promotional campaigns of all the citizens we surveyed. As the Spanish government makes moves to improve services and service delivery, it must give equal attention to developing strength in its relatively weak area of proactive communications. This will be a key component in ensuring citizens take advantage of the investments it makes and deliver a return on investment through a reduction in reliance on in-person transactions.

Trendsetters

Challengers

Followers

Formative

Sweden

Ranked 10th (joint)

Sweden's overall performance puts it firmly in the middle of the rankings in both areas of our scoring methodology. In particular, its 12th place ranking in customer service maturity was given a boost by its superior performance in the area of cross-government interactions.

The government's online vision has remained relatively unchanged since last year; however, the focus is not only on leveraging information technology to facilitate easy, 24/7 access to the public sector for citizens, but also to transform the public sector into a customer-focused service provider. The vision is to cultivate a network of agencies that cooperate to serve the citizen—a vision that the government recognizes will demand radical changes in organizations, processes and attitudes.

The decentralized Swedish government continues to implement its vision without a centralized action plan. Although the government provides general frameworks, these are guidelines only. Every agency or local authority sets its own targets and reports its general achievements back to the government. As a consequence, some agencies have eGovernment action plans while others do not. Those agencies that do have plans often have significant differences among them. The Swedish Agency for Public Management offers the closest approximation to a centralized action plan with its efforts to support the development of the 24/7 agency in Sweden; however, this action plan is rather loose and does not have specific deadlines for different stages. Despite recent moves by the government to foster greater cross-government collaboration (for example, the introduction of Sweden's Infra Services general agreement), Sweden's historically decentralized approach to service development may be negatively impacting citizens' perceptions of the government's effectiveness at working together to deliver better service. In our citizen survey, Swedes ranked their government among the lowest of all countries in this regard, with 31 percent ranking the government as "fairly" or "very" ineffective.

Although there is no central eGovernment plan, the Swedish government does measure progress centrally through the Swedish Agency for Public Management (Statskontoret, SAPM). In the spring of 2004, SAPM carried out a major study of the services that public authorities offer on their websites to determine the extent of transactional capabilities available. The results of this survey showed that while almost all agencies offered at

least the possibility to print various types of forms from their websites, very few offered transactional services. Our own research mirrors SAPM's findings: Sweden's service depth score of 66 percent reflects the need for improvement in this area.

For a number of years SAPM has commissioned a number of studies on the adoption of online services. However, these studies have been commissioned on an ad hoc basis and with no consistent structure, making it difficult to compare adoption over time. In September 2004, the government commissioned SAPM to develop a system for frequent measurement of progress against the eGovernment policy. SAPM expects to have finished the work developing this system by the end of May 2005.

Our citizen survey showed that Sweden's Internet-experienced population has a strong familiarity with eGovernment. Ninety percent of survey respondents who use the Internet on an at-least monthly basis reported having visited a government website. Their reviews were mixed, however: Only a third of these think the government is doing a "good" or "excellent" job. Despite the widespread Internet sophistication within the country, Swedes still prefer the telephone to the Internet almost 3 to 1.

Moving forward, the Swedish government recognizes the importance of measuring the tangible benefits of eGovernment to determine and demonstrate the value of investments made. In particular, SAPM points to the need for measuring cost efficiency among agencies. To facilitate this type of measurement at separate agencies, SAPM and the Swedish National Financial Management Authority (Ekonomistyrningsverket) have developed guidelines for measuring the profitability of IT investments made to realize the 24/7 agency vision. Again, however, Sweden's highly autonomous agencies are under no obligation to use these guidelines.

In general, Swedish citizens seem fairly comfortable with governments sharing most types of their personal information to ensure better service (with the exception of their medical records). For now, the Swedish government offers no central legislation regarding privacy of information in online government transactions, although there is legislation offering protection against invasions of privacy in connection with automatic data processing. Each agency or authority decides on the level of security necessary for the operation of its own websites.

Among the most notable examples of the steps agencies are taking to secure their online transactions, the National Tax Board (Skatteverket) has enabled citizens who receive the simple, precalculated version of the income tax self-assessment to use a "soft electronic ID" to file their self-assessment online. In addition, many citizens with more complicated self-assessments are also able to file electronically, if they have an electronic ID (provided by any of the Swedish banks). In 2004, 123,000 people filed more complicated self-assessments (including self-assessments where the citizen made changes to the precalculated data) online.

Another e-service using electronic signatures is a company registration service, codeveloped by the National Tax Board and the Swedish Companies Registration Office (Bolagsverket). A citizen who wants to register a private firm can access and file (if they have any of the eIDs offered by Swedish banks) any documents necessary for the process on a special website (https://www.foretagsregistrering.se), accessible from both the National Tax Board's and the Bolagsverket's websites. Previously, citizens who wanted to register a company had to contact both agencies at different stages of the process.

The service described above is also an example of the "networked agency" enabling the citizen/business to have just one point of contact with the authorities. This is the desired end state outlined in Sweden's 24/7 agency vision.

As Sweden progresses toward a new vision of leadership in customer service, the decentralized nature of the government remains an open question. The Swedish 24/7 agency vision emphasizes a focus not only on the accessibility of agencies online, but also on citizen-centered agencies with a number of access points. The vision stresses that e-services be available through all channels (such as call centers, short message service, or SMS, and digital TV) and not only online. However, there is no definitive strategy to provide a more consistent experience through all channels. Whether Sweden can coordinate service delivery to an extent that the mechanics become an invisible background to a seamless experience for the citizen will be an issue worth watching.

Trendsetters

Challengers

Followers

Formative

The United Kingdom

Ranked 10th (joint)

Britain initiated broad changes to its eGovernment program in the past year which, along with significant increases in expenditure on information technology (IT) and progress on a number of high-profile programs (particularly the National Health Service IT Program), may point to improved effectiveness in the near future. It will be interesting to watch the country's progress over the coming year, given these recent changes.

In conjunction with these activities has been the development of a new vision for information and communications technology (ICT), spearheaded through the reformation of the Office of the eEnvoy into the eGovernment Unit (eGU). The new role of the eGU is focused on ensuring that IT supports the business transformation of government itself so that it can provide better, more efficient, public services. As Ian Watmore, the new head of eGovernment and United Kingdom government CIO, has said, "eGovernment is evolving and is now focused on providing efficient and effective customer service through the use of new practices and technologies. Specifically, one of our main objectives in the United Kingdom is to transform the delivery of frontline services to support public servants and to develop new channel strategies which offer citizens access to services at their point of need."

The new emphasis and new leadership are seen as likely to generate profound impact. With this shift in focus to the transformation of government comes a broadening of responsibilities around strategy, architecture and innovation and a more explicit agenda for involvement in departments' strategic planning. In particular, the eGU has articulated 10 areas in which it expects to drive improvements in the United Kingdom's use of ICT. Many of these areas align with the main areas of leadership in customer service, including ensuring joined-up ICT strategies and policies are in place and that ICT supports citizen-centered public-service reform.

While the country's eGovernment vision has changed, the most recent action plan (late 2003) is still to be revised, which for now limits our ability to see what the United Kingdom's new intentions will mean in practice. However, this existing action plan already reflects the United Kingdom's recognition that the utility of putting more services online is approaching its limits. (The country already has a service breadth of 92 percent.) Its focus now is upon creating "first-class public services." Specifically, the

plan mentions services structured around the needs of customers, choices in the way citizens deal with government and paving the way for e-voting.

To support the eGU's plans, each government agency is responsible for creating a business-led road map that defines the future of its own IT strategies as well as how their strategies will join up with other services—in effect, creating an IT road map across government as a whole. While no single unique identifier is currently in place for citizens, the eGU recognizes that joining up services will require a government-wide approach to the subject of identification and authentication. Consequently, one of the eGU's current priorities is to provide clarity and direction in this area to move the United Kingdom away from the many different numbers that now exist across the government and in the direction of single unique identifiers. This effort has been given new momentum by the government's commitment to introduce identity cards.

Agencies are also asked to develop channel strategies in accordance with the national Channels Framework (released in late 2003), consisting of a mix of different technology-enabled channels supported by traditional channels. The National Health Service, for example, emphasizes excellence in its face-to-face interactions, but also offers information and services through the Internet, kiosks and 24-hour nurse phone lines. It is also investigating digital TV services for 2005.

Interestingly, the United Kingdom is one of the few countries where we saw explicit reference to increasing the adoption of key services by improving their customer focus as one of the government's main priorities.

In fact, the United Kingdom has instituted a number of surveys and other mechanisms to gauge not only adoption but progress overall. Efficiency Technical Notes (ETNs) set out the measures and methodologies that departments are using to assess progress toward the efficiency targets agreed under the 2004 Spending Review. On a national level, the government conducts regular surveys of households to gauge Internet access and use in general, as well as eGovernment specifically.

The first of these surveys to include the comprehensive eGovernment module is expected to be available in March 2005. The government will be monitoring the results closely; the United Kingdom in the past has suffered from low adoption of and satisfaction with eGovernment. In our citizen survey this year, 41 percent of UK respondents reported that they have used eGovernment. Only 19 percent, however, consider their government to be doing either a "good" or "excellent" job in this area. Overall, we saw a somewhat tepid enthusiasm for eGovernment in general, indicating that this will still be an area worth focused attention. For example, UK citizens expressed only mild agreement that eGovernment made government more efficient, effective and accountable, saved money, and provided easier access and better service (less than 50 percent net agreement in all of these areas).

The flagship electronic service Directgov (www.directgov.gov.uk) should help boost adoption of services significantly, by aggregating users and services in a single location with a user interface designed around the customer's needs. Current examples of cross-government topics on Directgov (with more in the pipeline) include money, caring for someone, learning, employment, home and community, health and well-being, travel and transport, and Britons living abroad. Directgov also has links to the home pages of all county, district and unitary authorities in the United Kingdom within a dedicated area, and most of the local authorities are linked back. Directgov on digital TV gives access to local authority sites as well.

The eGU successfully launched Directgov in 2004 and it is being well received by customers. Eighty percent of users state that Directgov gives convenient access to public services and information, and nearly twice as many respondents rated Directgov as "good" overall, compared to its predecessor, UK online. Even without any significant marketing yet, Directgov is regularly receiving 150,000 unique users per week. Plans to promote the product should increase eGovernment adoption further by aggregating more users and services in a single location.

To further boost adoption, the UK government is actively investigating alternate channels of service delivery, most notably, digital TV. Much will be riding on the government's drive to offer citizen-centered e-services to bridge the digital divide and put the government on a more solid footing for rapid advancement toward leadership in customer service.

Trendsetters

Challengers

Followers

Formative

The United States

Ranked 2nd

The United States performed well in most areas of our scoring this year, ranking number two in both components of our scoring methodology. Within customer service maturity, the United States ranked in the top five in the citizen-centered, multi-channel and cross-government areas, but ranked 10th in proactive communications. While it is in the top 10, this area seems worth greater concentration in the future.

The US eGovernment vision has remained consistent for several years, with its basic principles of reforming government to make it citizen-centered, results-oriented and market-based. Electronic government is considered one of the critical components of making government more responsive and cost effective under President Bush's larger Management Agenda. Operating under the original vision, there has been an expansion of the action plan related to identifying business process improvement and potential shared services opportunities across agencies.

To measure progress, the United States uses a scorecard for its initiatives, tracking both the current status of eGovernment across agencies as well as the agencies' overall progress toward fulfilling the Management Agenda. A number of independent organizations track the US government's performance as well. For example, the ACSI E-Government Satisfaction Index, produced by the University of Michigan, measures the website performance of many government agencies. The September 2004 survey gave mixed reviews; while overall satisfaction with federal websites increased 5.4 percent over the past year to 71.2 (on a scale of 0 to 100), approximately 40 percent of the sites had decreases in satisfaction from the previous quarter.

Likewise, our citizen survey findings reflect room for improving the citizen experience: 58 percent of our respondents had used eGovernment and only 35 percent of the total respondents rated the job the US government was doing in this regard as either good or excellent.

The United States seems to recognize that it has moved past the deployment stage and needs to focus more attention on driving adoption and use of its initiatives. To that end, the Office of Management and Budget (OMB) initiated an effort with a non-profit organization to define 100 percent utilization and plan how current eGovernment initiatives will reach that mark. This in turn will lead to marketing plans for each eGovernment initiative to identify target audiences and how best to reach each group.

As mentioned earlier, the United States needs to focus more attention on proactive communications, and the government has, in fact, taken some steps to improve its outreach program. In an interesting move, the OMB hired a public relations firm in September 2004 to draw up marketing plans for 10 eGovernment websites, after a number of surveys showed that most citizens are unaware of federal eGovernment sites and often come across them only accidentally while surfing the Web.

The US eGovernment initiative that promotes multi-channel contact is called USA Services (www.USAServices.gov). USA Services is one of the priority initiatives of the President's Management Agenda. Its mission is to present citizens with a single "front door" for government, allowing them to receive accurate, timely and consistent answers and information. In particular, USA Services allows citizens to get information from federal agencies in both English and Spanish via the Internet, publications, telephone and e-mail in a privacy-protected environment; provides call tracking to partner agencies for improved service quality and timeliness in responses to the citizen; and reduces partner agency expenses for infrastructure, procurement and labor. During fiscal year 2003, USA Services had 209 million citizen contacts through its call center (1-800-Fed-Info), portal (www.FirstGov.gov) and publications center. Plans for fiscal year 2005 include research and benchmarking contact services to lead to better service.

A cross-agency and cross-government level approach is also a key part of the President's Management Agenda, and numerous services that require cross-agency collaboration have been implemented—as reflected by the United States' strong showing in the cross-government area. Among the most notable, Grants.gov (www.grants.gov) allows organizations to electronically find and apply for competitive grant opportunities from all federal grant-making agencies. Grants.gov is the single access point for more than 900 grant programs offered by the 26 federal grant-making agencies. For businesses, the business gateway Business.gov (www.business.gov) guides businesses through the maze of government rules and regulations and provides access to services and resources to help people start, grow and succeed in business. Business.gov is a collaborative effort among a number of departments, independent agencies and quasi-government corporations.

To facilitate efforts to transform the federal government to one that is citizen-centered, results-oriented and market-based, the OMB is developing the Federal Enterprise Architecture (FEA), a business-based framework to support cross-agency collaboration, transformation and government-wide improvement. The FEA is being constructed through a collection of interrelated "reference models" designed to facilitate cross-agency analysis and the identification of duplicative investments, gaps and opportunities for collaboration within and across federal agencies.

The United States is fairly advanced in how it deals with privacy and security of personal information, which is codified in the comprehensive E-Government Act of 2002. New for 2005 are implementation guidelines and plans related to this legislation. The country is also on a fast track to implementing E-Authentication, the lynchpin of its strategy to enable secure electronic transactions for its citizens and businesses.

Despite these steps, however, US citizens remain wary about government sharing their personal information, including passport, health insurance and medical information, as shown by our citizen survey. Most notably, US citizens expressed the clearest opposition of any country to sharing their social security number (74 percent opposed). This strong negative attitude is likely due to US citizens' high level of awareness about identity theft and the criticality of the social security number in this regard. On a broader level, the concept of a national ID is not without controversy. The 9-11 Commission's recommendation for federal standards for identification documents such as driver's licenses and birth certificates has opponents questioning the ability of the cards to prevent terrorism and the potential for abuse of civil liberties. Moving forward, the US government will need to take additional steps—not just in terms of infrastructure and policies, but also in public education—to reassure the public about the security of their personal information. Greater public confidence is essential to move toward even greater cross-governmental collaboration and integrated and coherent delivery of services.

Appendix A

The Accenture Public Sector Value Model

Accenture has developed the Accenture Public Sector Value Model (patent pending) to help government agencies analyze how they deliver value to citizens and how they can improve their performance to deliver increased value and become high-performance governments.

The Accenture Public Sector Value Model was developed to address the challenge agencies face in developing a meaningful baseline for measuring performance and performance improvements. It proposes a more complete approach to measuring successful actions and provides a process for tracking progress over time.

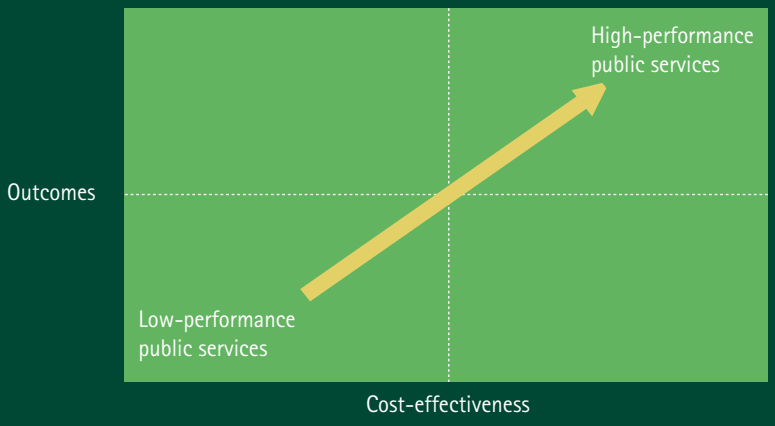
At its simplest, the Accenture Public Sector Value Model considers two levers of public value—outcomes and cost-effectiveness. By increasing one or the other, agencies can be understood to be creating value. By increasing one at the expense of the other, they can be understood to be making a trade-off between their two fundamental means of creating value. A decrease in both levers represents a clear reduction in value.

A Public Sector Value analysis defines outcomes for government agencies based on their:

- **Statutory purpose**—What the agency is established to do (for example, a revenue agency is established to collect tax revenues; a school board is established to educate children; and a police force is established to maintain public order).
- **Stakeholder expectations**—What the stakeholders expect of an agency as it performs its statutory duties (for example, that a social security agency's interactions with citizens will be prompt, accurate and courteous and that a revenue agency will minimize the burden of compliance on businesses).

These outcomes are weighted, based on relevant external factors for specific administrations. They are then measured using metrics, which can be grouped to develop an outcome score. Separately, the cost of the resources deployed in delivering these outcomes is calculated. Then, by dividing cost into outcomes a cost-effectiveness score is developed (see Figure 17).

Figure 17: The Accenture Public Sector Value Model (patent pending)



- Outcomes are a weighted basket of social achievements
- Cost-effectiveness = $\frac{\text{Outcomes}}{\text{(Annual expenditures - capital expenditure + capital charge)}}$
- Hypothesis = greater value is created through generating improved outcomes in a more cost-effective way

A movement toward the top-right quadrant on the Accenture Public Sector Value Model graph represents real public-sector value creation.

Public-sector value is created as the delivery of outcomes is improved in a cost-effective fashion. Accenture believes high-performance government agencies will consistently increase the public-sector value they deliver year after year by a combination of service delivery improvements balanced by increases in cost-efficiency.

The Accenture Public Sector Value Model cannot tell whether a government is performing well or badly. However, it can tell whether a government is doing better or worse from year to year, or whether it is performing better or worse than comparable agencies elsewhere. It can identify what actions were taken to cause improvements and help pinpoint problems. It should not replace other performance measures; rather, it complements these other approaches. Other performance measures will still be required to measure whether an agency is being well run.

Appendix B
Research methodologies

This year, our research methodology has changed extensively. While we have kept some of the essentials from past years, our move away from an eGovernment focus per se to the broader dimensions of leadership in customer service required a rejuvenated methodology. This is a significant shift in the report, which enabled us to go far beyond eGovernment alone in our assessment of countries' maturity.

Quantitative online service assessments

To that end, we have maintained some of the foundation of our research—namely, the quantitative assessment of the quality and maturity of services for both citizens and businesses; however, we have changed some of the services assessed (44), added some (11) and dropped others (40). Many of the questions that were dropped related to questions that were not applicable at a national level for many countries. The ones we changed or added were included to keep abreast of the latest government service offerings. In all, the number of online services we measured dropped from 206 to 177.

Behaving as citizens and businesses, Accenture researchers in 22 selected countries attempted to fulfill service needs that typically might be provided by a national government. They began by assessing the websites of national government agencies to determine the breadth of services and the level at which citizens could interact with government. The next step involved evaluating other capabilities, such as the cohesiveness across multiple channels and the extent and sophistication of governments' efforts at outreach and education related to their services. The research was carried out between January 3, 2005, and January 17, 2005.

Accenture selected 22 governments for the study: Australia, Belgium, Brazil, Canada, Denmark, Finland, France, Germany, Ireland, Italy, Japan, Malaysia, Mexico, the Netherlands, Norway, Portugal, Singapore, South Africa, Spain, Sweden, the United Kingdom and the United States. In total, we investigated 177 national government services across 12 major service sectors. The 12 service sectors researched were agriculture; defense; eDemocracy; education; human services; immigration, justice and public safety; participation; postal; procurement; regulation; revenue; and transport. The services

surveyed were representative of what citizens and businesses require from their government most frequently. The services were traditionally offered over the counter, by phone or in paper format.

Our research was restricted to central governments to provide a common base of comparison. In instances where services are delivered at a state, local or regional level, these services were removed before the analysis was undertaken for a country and the government concerned was in no way penalized. No government surveyed offered all 177 services at the national level. In most countries, at least some services were offered at a lower tier of government—examples of which include state, regional, municipal and county. For example, education services in Canada are the responsibility of the provinces and are therefore outside the scope of the study in that country.

Services were categorized into three levels—publish, interact and transact—reflecting the maximum maturity at which a particular service could be offered. Within each level, services were scored on a three-point scale to reflect their service maturity.

Two measures were combined to determine the overall maturity of the countries in the research: service maturity and customer service maturity.

Measurement criteria

Service maturity

Service maturity measures the level to which a government has developed an online presence—the most critical service delivery channel in terms of driving down delivery costs.

Service maturity takes into account the number of services for which national governments are responsible that are available online (service maturity breadth), and the level of completeness with which each service is offered (service maturity depth). Service maturity overall is the product of service maturity breadth and service maturity depth.

Service maturity definitions

- **Publish**—Passive/passive relationship. The user does not communicate electronically with the government agency and the agency does not communicate (other than through what is published on the website) with the user.
- **Interact**—Active/passive interaction. The user must be able to communicate electronically with the government agency, but the agency does not necessarily communicate with the user. Where interaction occurs between user and agency, the user may receive individualized responses to questions, but the process is not considered a complete end-to-end transaction.
- **Transact**—Active/active interaction. The user must be able to communicate electronically with the government agency, and the agency must be able to respond electronically to the user. Transact substitutes a formal process previously carried out on paper or by attending an office in person and requires some form of exchange that confirms the transaction is valid.

Customer service maturity

Customer service maturity measures the extent to which government agencies manage interactions with their customers (citizens and businesses) and deliver service in an integrated way. While we have examined customer relationship management capabilities in government service delivery in the past, our methodology regarding this measure has changed dramatically this year. The weight we have assigned to this critical factor has also been increased considerably.

This year, our customer service score considers how well governments have addressed the four dimensions of leadership in customer service: citizen-centered, multi-channel, cross-government service delivery, proactively communicated to the citizens and businesses that are the end recipients.

- **Citizen-centered interactions**—This category addresses the nature of the customer experience at all points of contact. More specifically, it measures the extent to which the government creates a relevant personalized experience for customers by understanding who they are and anticipating

Appendix B

their needs. Within this category, a service can fall within a range of maturity:
  - **Program-centric customer experience:** Does the agency structure its service offerings by program/department?
  - **Customer group segmentation:** Does the agency suggest other applicable services based on general customer segment needs?
  - **Individual segmentation:** Does the agency provide services based on personal needs and intentions?
  - **Intelligent interaction:** Does the agency go beyond just anticipating the user's current needs to predicting the user's behavior and alerting the user with regard to future entitlements?

- **Cross-government service interactions**—This category addresses services that are managed and delivered both within and across governments and beyond their jurisdictional boundaries where appropriate. More specifically, it measures the sophistication of government service capabilities, agency interactions, and the extent to which departmental lines and government structures are invisible to the customer. Within this category, a service can fall within a range of maturity:
  - **Basic interaction:** Can the user request a service or complete a transaction within a single department within an agency?
  - **Intra-agency interaction:** Can the user access other value-added services (that is, other organizational groups within an agency) related to the original request from a single location?
  - **Cross-agency interaction:** Can the user access all relevant government agencies, regardless of source agency, to complete a single transaction?
  - **Cross-government interaction:** Can the user process transactions with other levels of government (for example, local, regional, national, international) or with other organizations (semipublic or private sector, for example) from a single location?

- **Multi-channel service delivery**—This category addresses the extent to which service delivery channels are integrated to deliver uniform information and a consistent customer experience in a comprehensive and timely manner. Within this category, a service can fall within a range of maturity:
  - **Basic access:** Does the agency provide multiple methods to deal with the user's query?
  - **Multi-channel experience and citizen data capture:** Does the agency deliver a consistent experience, regardless of channel, and capture and display basic data uniformly at various touch points?
  - **Channel synchronization and case management:** Does the agency support customer information sharing across channels to the extent that it enables an integrated view of the citizen?
  - **Seamless service delivery:** Does the agency store and dynamically process customer information and give the user a true real-time, end-to-end multitransactional experience?

- **Proactive communication and education**—This category addresses the extent to which the agency actively informs or educates the citizen of current government capabilities, creates effective segmentation means and uses techniques to help citizens become well versed in the benefits of optimal service delivery in a consistent and timely manner. The government also proactively monitors and tracks whether and how the citizen's needs are being met. Within this category, a service can fall within a range of maturity:
  - **Program offerings:** Does the agency provide a basic description of its mandate and programs offered?
  - **Proactive service offerings:** Does the agency utilize tools or techniques to encourage usage and take-up?
  - **Targeted offerings:** Does the agency utilize advanced tools and techniques to deliver targeted messages to the customer?
  - **Mutual value offerings:** Does the agency target the right message to various customer groups, using the most effective communication and marketing techniques, and monitor their impact to ensure they are value driven?

Appendix B

Overall maturity

Service maturity and customer service maturity were combined to determine the overall maturity of the countries in our research. By combining these two elements of maturity we were able to allocate a ranking to each country within the 22 countries sampled (overall maturity). We allocated a 50 percent weighting to service maturity and a 50 percent weighting to customer service maturity to reflect our broader vision and increase our emphasis on the multiple dimensions of value-led service delivery—service that not only includes but also extends far beyond excellence in eGovernment alone.

Citizen research

In addition to the base research described above, we also conducted quantitative research on citizens' perceptions and practices related to service delivery in all 22 countries featured. This is the second year we have included a citizen survey in our annual government leadership report; however, it is the first year we have included views from all countries covered in the report, rather than a subset.

The citizen survey was conducted by an independent market research company, Lansdowne Market Research (part of the Millward Brown Group), from January 4 through January 18, 2005. A representative sample of 400 adults aged 18 and over was surveyed in each country (with the exception of the United States, where 600 were surveyed).

Polls were conducted via the telephone, using random-digit dialing. Poll respondents were a nationally representative sample of all adults, aged 18 years or older in 18 out of 22 countries. In the remaining four countries—Brazil, Malaysia, Mexico and South Africa—leading international practices for conducting research were used to get a polling sample. In Brazil, the sample was representative of higher income groups with a home phone in São Paulo and Rio de Janeiro; in Malaysia, the sample was representative of adults 18 and older with a home phone in peninsular Malaysia only; in Mexico, the sample was representative of adults 18 and older in Mexico City, Guadalajara and Monterrey, and interviews there were conducted face-to-face; and in South Africa, the sample was representative of all higher income groups with access to a home phone. As a resullt, in these four countries, Internet penetration figures are higher than other published data.

Participants were asked a series of 15 questions about their attitudes toward their countries' service delivery programs, their use of different service channels and their interests in particular services.

Qualitative background research

We supplemented our research—for the overall findings as well as for the individual country reports—with information about the service delivery environment in each of the 22 countries surveyed. Information obtained included the history, content and ownership of each country's service delivery program; information on plans, strategies and initiatives to provide a multi-channel experience and to rationalize/optimize channel usage; information on plans, strategies and initiatives to develop and deliver services across government agencies and across governments; and information on the plans, strategies and initiatives to facilitate these changes (such as changes in governance, technology enablers and any recent political and legal developments around service delivery).

This is the fourth year we have gathered information about the service delivery environment in each of the countries surveyed. We have revisited the areas examined last year to measure any changes in policy or practice, as well as analyzed a number of additional areas to capture information to reflect our new vision. We have drawn on this background information throughout the research report.

About Accenture

Accenture is a global management consulting, technology services and outsourcing company. Committed to delivering innovation, Accenture collaborates with its clients to help them become high-performance businesses and governments. With deep industry and business process expertise, broad global resources and a proven track record, Accenture can mobilize the right people, skills and technologies to help clients improve their performance. With more than 100,000 people in 48 countries, the company generated net revenues of US$13.67 billion for the fiscal year ended August 31, 2004. Its home page is www.accenture.com.

Accenture has experience working with hundreds of clients in all levels of government around the world. We have the proven experience, deep industry insight and combination of strategic acumen and delivery capability to help our clients achieve high performance. For more information on how Accenture can help your government organization achieve high performance through leadership in customer service, please contact:

Martin Cole, Group Chief Executive
Government Operating Group
martin.i.cole@accenture.com or
+1 860 756 2592

Vivienne Jupp, Managing Partner
Government Service Lines
viviennne.jupp@accenture.com or
+353 1 646 2001

Key partner contacts

Country	Partner sponsor	e-mail
Australia	Jack E. Percy	jack.e.percy@accenture.com
Belgium	Jos Vranken	jos.i.vranken@accenture.com
Brazil	Antonio C. M. Ramos	antonio.c.m.ramos@accenture.com
Canada	Graeme Gordon	graeme.gordon@accenture.com
Denmark	Jakob H. Kraglund	jakob.h.kraglund@accenture.com
Finland	Elina Piispanen	elina.piispanen@accenture.com
France	Antoine Brugidou	antoine.brugidou@accenture.com
Germany	Stefan Schneider	stefan.schneider@accenture.com
Ireland	Ger Daly	ger.daly@accenture.com
Italy	Alessandro Rossi	alessandro.rossi@accenture.com
Japan	Yasumasa Takeda	yasumasa.takeda@accenture.com
Malaysia	Ghazali Darman	ghazali.darman@accenture.com
Mexico	Rafael Rovira	rafael.rovira@accenture.com
Netherlands	Michel van Rosendaal	michel.van.rosendaal@accenture.com
Norway	Roy Gronli	roy.gronli@accenture.com
Portugal	Joao Antonio Tavares	joao.antonio.tavares@accenture.com
Singapore	Chin Siong Seah	chin.siong.seah@accenture.com
South Africa	Pierre L. Dalton	willem.j.strauss@accenture.com
Spain	Ignacio Leiva Piedra	inaki.leiva@accenture.com
Sweden	Annika Thunberg	annika.thunberg@accenture.com
United Kingdom	Marcus Robinson	marcus.d.robinson@accenture.com
United States	Richard T. Wheeler	richard.t.wheeler@accenture.com
Customer Relationship Management	Andrew Simmonds	andrew.simmonds@accenture.com
Accenture Public Sector Value Model		
Atlantic & Europe	Karen Braeckmans	karen.m.braeckmans@accenture.com
Asia Pacific	Mark P. Stoke	mark.p.stoke@accenture.com
United States	David I. Moskovitz	david.i.moskovitz@accenture.com
Adoption Analytics and Modeling	Robert S. Holston	robert.s.holston@accenture.com

The Government Executive Series

Leadership in Customer Service: New Expectations, New Experiences

April 2005