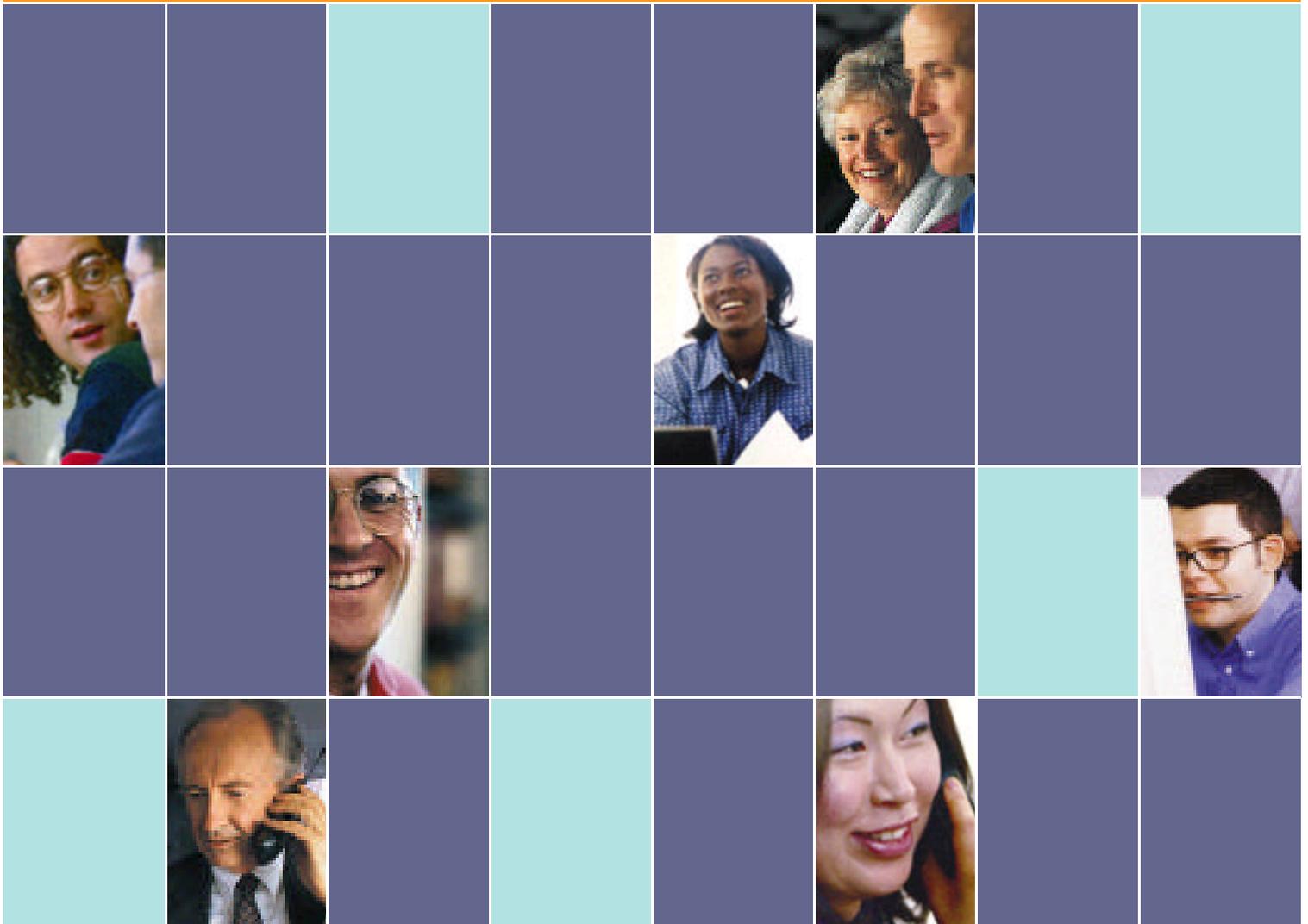


eGovernment Leadership

Rhetoric vs Reality – Closing the Gap

>
accenture





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foreword_

Online service delivery has never been higher on the political agenda than it is today. From the United Kingdom to the United States, Belgium to Brazil and Malaysia to Mexico, governments are talking about the significant benefits that can be realised by migrating traditionally paper-based and face-to-face services to the Internet. Governments also understand these services must be customer focused, cost effective, easy to use and value-added for citizens, businesses and the governments themselves.

But when we move beyond the rhetoric, what progress has been made in the development of eGovernment? What actions have national governments taken to turn their vision into reality? What opportunities exist for countries to truly exhibit eGovernment Leadership?

In *Rhetoric vs Reality - Closing the Gap* these questions are asked of 22 countries.

By examining the breadth and depth of national government services available online, this report provides a comprehensive overview of eGovernment maturity today. Politicians, public servants, businesses and citizens all have a stake in these findings, and all have a role to play in ensuring the opportunities opened up by the Internet are maximised.

Since we last measured eGovernment Leadership in 2000, progress has been made. This has been amplified in some countries by important organisational changes, and as a result new eGovernment leaders have emerged and more sophisticated service offerings have appeared.

At the same time, no nation has demonstrated the level of sophistication of Internet presence which is fast becoming the norm amongst leading private sector companies. Single sites, or portals, which allow citizens and business to seamlessly interact with several government departments at one visit, have not yet emerged as the dominant model.

Agency silos continue to dominate and as a result, even the leading countries in this research are less than half way to reaching their full online service potential.

Without doubt, every one of the 22 nations analysed in *Rhetoric vs Reality - Closing the Gap* has the potential to redefine the eGovernment landscape. But many, if not most of these nations, still have a long way to go.

Tomorrow's eGovernment leaders will match strong political will with co-ordinated action. Whole of Government guiding principles are required to ensure that through cross agency co-operation, a framework for customer focused, service provision emerges. These countries will organise their online services around citizens and businesses and will build new value-added relationships and alliances with the private sector.

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introduction_

Since the mid 1990s, public sector leaders, like their counterparts in the private sector, have been grappling with how to best use the new and emerging technologies to build relationships and deliver services.

While businesses quickly embraced the Internet as a new service delivery channel, governments have traditionally shown a more cautious approach. In the year 2000, Accenture tested the level of eGovernment activity across 20 countries and found that political leaders were increasingly commenting on the merits of online government, yet this was not translating into action. At that stage, even the eGovernment leaders had struggled to make inroads toward maximising their online service potential.

In 2001, we revisited our research approach to measure how far 22 of the world's national governments are faring in the online environment. Portugal and Finland are included for the first time this year.

Rhetoric vs Reality - Closing the Gap identifies today's eGovernment status, highlights the characteristics that differentiate the various levels of development and comments on the key issues governments need to consider to improve the level of online service provided to citizens and businesses.



methodology and definitions_

To determine the current status of eGovernment development in 22 countries, Accenture researchers 'behaved as citizens and businesses' and turned to the Internet in an attempt to fulfil service needs that might typically be provided by national governments. The research was carried out between 8-19 January 2001.

In total, 165 national government services across nine major service sectors were investigated. The nine service sectors researched were Human Services, Justice & Public Safety, Revenue, Defence, Education, Administration, Transport, Regulation & Democracy and Postal.

The services surveyed were those traditionally offered over the counter, by phone or by letter. The services were representative of what citizens and businesses require from their government throughout their life cycle.

No government surveyed offered all 165 services. For example, policing is a state or county level service in the United States, Canada and Australia, so it was out of the scope of the study. In such instances, those services were removed **before** the analysis was undertaken and the government concerned was in no way penalised for non-delivery of a service outside of their responsibility.

Services were categorised into three levels of service: Publish, Interact and Transact, which reflected the maximum level at which a particular service could be offered. Within each level, services were scored at three levels to show the maturity they had reached.

Two measures were used to determine the eGovernment maturity of the countries in the research: Service Maturity and Delivery Maturity. These were then combined to find each country's Overall Maturity.

Measurement Criteria

Service Maturity

Service Maturity measured the level to which a government had developed an online presence. It took into account the number of services for which national governments were responsible, that were available online (Service Maturity Breadth), and the level of completeness with which each service was offered (Service Maturity Depth). Service Maturity Overall was 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. Example – publishing legislation online.

Interact – Active/Passive interaction. The user can communicate electronically with the government agency, but the agency does not necessarily communicate electronically with the user. Example – applying for a service online through Internet e-mail.

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 with the user. Example – applying for a service online and receiving an electronic confirmation of the application.

Levels Of Service Maturity

Very Low (under 15%) – few possible services online, generally those that are available have not yet developed to full maturity.

Low (15–25%) – some services online, but most at the Publish level only, thereby displaying higher breadth, but little depth of services.

Marginal (25–35%) – high number of services online, and some services being offered at the Interact and Transact levels, but with considerable opportunity in both Service Maturity Depth and Breadth metrics.

Moderate (above 35%) – a considerable number of services at Interact and Transact levels and a greater proportion of services offered to their maximum potential.

Delivery Maturity

Delivery Maturity was the new component in this year's research and measured the sophistication of delivery mechanisms such as single point of entry, design by customer intentions, customer relationship management techniques, portal capability and the additional value-added services.

Levels Of Delivery Maturity

Very Low (20% and under) – little evidence of citizen facing services or co-ordinated development between agencies.

Low (27%) – some value being added for the user through single points of access, customer relationship management techniques and customer focused websites, but development is fragmented.

Marginal (33%) – some progress being made to make the government's web presence more sophisticated, but most development is still at a rudimentary stage.

Moderate (40% – 60%) – good potential being shown in developing a sophisticated Whole of Government customer focused web presence.

Overall Maturity

A combination of Service Maturity Overall and Delivery Maturity allowed each country to be allocated a ranking that represented its positioning within the 22 country sample (Overall Maturity). This measure gives a 70% weighting for Service Maturity Overall and a 30% weighting for Delivery Maturity. This weighting reflects the fact that, for the moment, the level of service provision is more important than the style of delivery.

Based on the Overall Maturity rankings, countries were divided into categories based on similar scores and characteristics.

Levels Of Overall Maturity

Innovative Leaders – stand apart from other countries due to the high number of mature services offered online.

Visionary Followers – those countries that have exhibited the beginnings of strong growth based on a solid base of services online and generally showing some development in Delivery Maturity.

Steady Achievers – generally show a large breadth of services, but have significant opportunity to grow through maximising the potential of online services and growing Delivery Maturity.

Platform Builders – low levels of online service, and large potential to develop a co-ordinated cross-agency web presence of government.



research findings_

Introduction

The eEconomy has transformed forever the expectations of citizens and businesses toward service delivery. One-to-one marketing, 24x7, permission based; terms that did not exist five years ago now permeate the lexicon of customer service. These expectations are now being transferred from the commercial sector to the interactions between citizens and their governments.

Citizens can now purchase a car online, but must stand in-line to register their new vehicle. Businesses can procure their supplies in a competitive Business-to-Business online exchange, but must file compliance reports on paper and often in person. The divergence between dealing with government, in the real world, and operating as a citizen or a business in the online world, is focusing attention on the extent to which governments are incorporating the online world in their service delivery models.

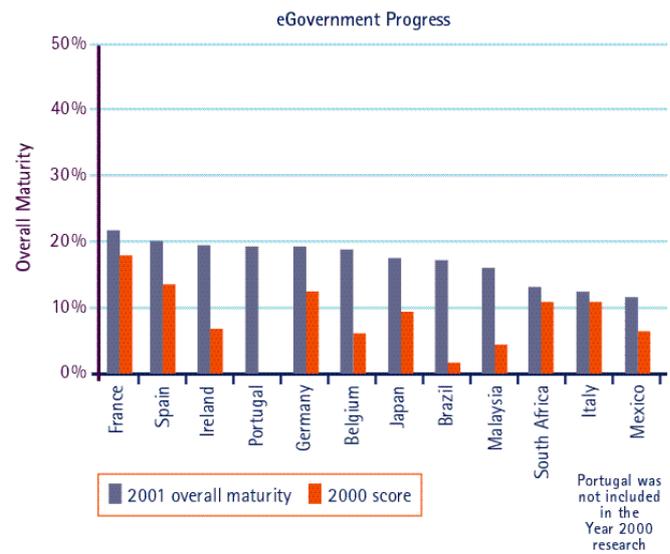
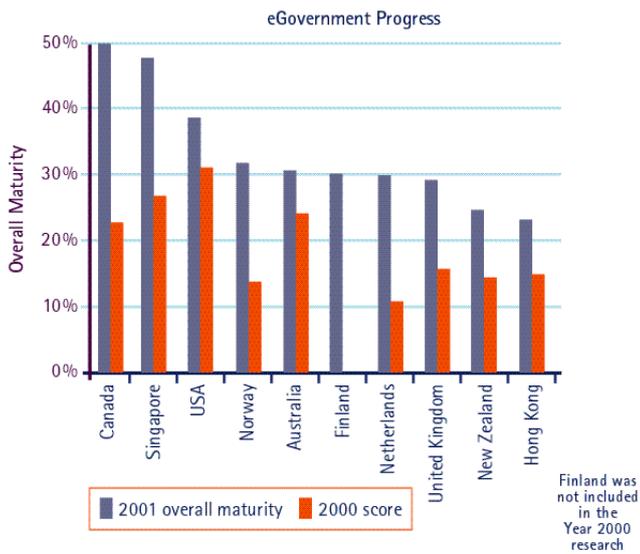
Politicians are espousing the benefits of a connected government and have recognised that eGovernment implementation can lead to dramatic improvements in public services.

eGovernment visions are being articulated and plans developed, to demonstrate to stakeholders that action is being taken.

Implementing eGovernment is, however, considerably more complex than a corporate introducing online sales or moving procurement to a trade exchange. Calls for government service delivery to migrate from in-line to online sooner rather than later often overlook the complex social, regulatory and legal issues governments face in changing their service delivery models.

The challenges inherent in implementing eGovernment are the subject of this research report. In this second round of eGovernment Leadership research, we attempted to find out what progress had been made in the past year for the 22 countries surveyed. Had the early leaders maintained their position and continued to develop capabilities? Had those countries that showed the greatest potential fulfilled it? What new trends emerged?

In broad terms, the findings illustrate that while the majority of governments surveyed have outlined a vision for eGovernment, bringing that vision to life continues to be a complex process.



Visions, by their very nature, are high-level statements of intent, outlining eGovernment goals but omitting the details of implementation. The implementation hurdles of making government-wide programmes come alive are immense. Governments not only recognise that there is a need to move the appropriate group of citizens and businesses towards new service delivery channels, they also recognise the need to target resources towards the more needy groups within society.

The digital divide complicates the landscape for governments in their transition to online service delivery, and is prominent in any discussion concerning governments using the Internet to provide services to their citizenry. The issue assumes even greater importance given that some government services with significant potential to achieve improved efficiencies and lower cost in online delivery (such as social services) are those for which the majority of consumers are most adversely affected by the digital divide.

Notwithstanding these challenges, real advancements are being made. The governments surveyed are all making progress, albeit at different rates and across a wide continuum of sophistication, from the most basic published information online to providing entire services such as filing a tax return and receiving a refund. The eGovernment status of these countries covers the full spectrum but is joined by a common thread; all the governments surveyed clearly have eGovernment on their policy programme, and are moving at different speeds to improve service delivery to their citizens in the online world.

The research findings reflect government online as at January 2001. They do not factor in the actual or potential impact of vision statements, new administrative bodies or new political initiatives designed to focus efforts on eGovernment. There are many new initiatives that have been announced since the research date which have yet to pay dividends, but they show that governments are starting to rethink their early approaches and taking a more co-ordinated approach to eGovernment development.



research findings

Characteristics of an eGovernment Leader

Interestingly, the research found that overall progress in eGovernment is not closely correlated with similar social, political or economic characteristics. Leadership, political will, commitment to deliverables and accountability for results are the factors that appear to have the greatest influence on progress. The early adopters of eGovernment, driven by these factors, have achieved greater sophistication in online service delivery, while countries that are only now articulating their vision have the opportunity to make up ground and learn from the lessons of the leaders.

There are five common characteristics shared by the eGovernment leaders:

Vision and Implementation

The leaders articulated a vision early, and proceeded to put in place the right administrative mechanisms to support agencies in implementation, to communicate deliverables and establish accountability for delivery.

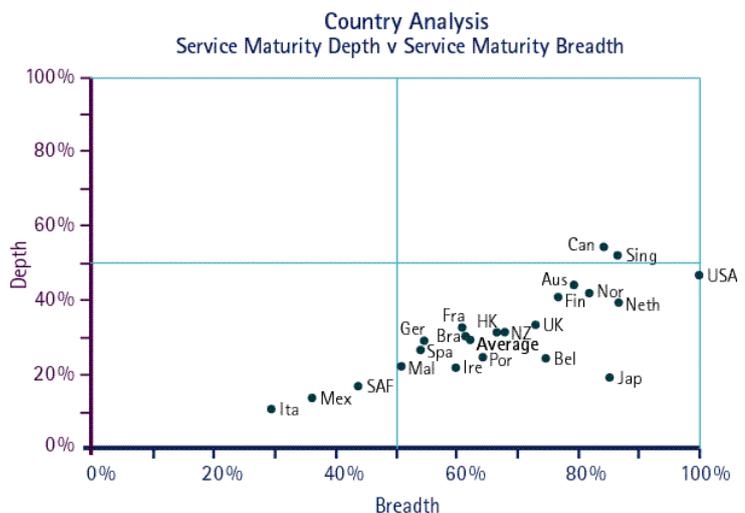
The Innovative Leaders have struck the right balance between political leadership and administrative simplicity in their eGovernment programmes. The experience of these countries has shown that early political leadership builds momentum, and the creation of simple guidelines and deliverables for government agencies combine to deliver results quickly.

Citizen-Centric – An Intentions Based Approach

In the first phase of eGovernment development, agencies typically published information online, and organised their web presence around how they operated and the services they delivered in their physical facilities. This was true too of early private sector forays onto the Internet, where real world organisation was replicated in the virtual world on

the assumption that consumers would behave in the same fashion online.

Experience has shown that this model does not deliver a change in customer service levels, and that an online presence should be based around what the citizen wants to do, rather than how the agencies are organised. This approach, known as intentions based design, is common in the online activities of the leading countries. Singapore introduced this design early through its eCitizen website which was developed around the lifecycle of the citizen and the typical interactions they would have with government at various stages of their life.



Introducing Customer Relationship Management

CRM, or customer relationship management, is now entering the government sphere. CRM, put simply, is the name given to techniques of managing customer information that allow enterprises to streamline communication and marketing processes by tailoring offerings, minimising duplication of information gathering, and profiling customer behaviour to predict likely future requirements.

The simplest manifestation of CRM is being remembered on the second and subsequent occasions you interact with a business, with only the products and services appropriate to one's individual circumstances being offered.

Governments have the largest customer base in the world and stand to benefit enormously from adopting CRM disciplines in terms of increased efficiencies and lower service delivery costs. The Innovative Leaders showed some evidence of this approach in their online service delivery. The countries that are first to integrate CRM with online service delivery will secure for themselves a defensible position in the leaders group in the future.

Volume and Complexity

Our research methodology was designed to recognise not just volume of services online, but to give recognition to those countries that tackled more complex services and provided both interactive and transaction capabilities. The Innovative Leaders have moved beyond the earlier construct of 'every agency must have a website' and are now creating innovative solutions for the citizens and businesses they serve.

Government Sector Analysis
Service Maturity Depth vs Service Maturity Breadth



HS - Human Services
JPS - Justice & Public Safety
Rev - Revenue
Def - Defence
Edu - Education
Adm - Administration
Tra - Transport
Reg - Regulation & Democracy
Pos - Postal

Portals – Single Interaction Points

Website proliferation has, for many countries, been the outcome of their initial vision statements in which every agency was exhorted to create an online presence, without much thought being given to whether this represented an enhancement to service delivery.

Many governments in our survey have now recognised that it is not citizen-friendly to require visits to individual sites, just as they would have visited a range of physical facilities to conduct business. Portals offer single points of entry to multiple agencies and afford citizens or businesses the opportunity to interact easily and seamlessly with several agencies. Portals are growing in importance, and the leading countries have all begun to consolidate their online service delivery into this next generation of government web presence.

eGovernment leaders all recognise that these characteristics are essential for the creation of an approach to eGovernment that balances high quality service provision whilst managing the inherent complexity involved in bringing this about.

Their visions have the right element of realism, and recognise that totally collapsing the industrial age structures of government as a prerequisite for online service delivery is not an option, nor a requirement for eGovernment success. These governments are working within their existing structures, providing their agencies with guidance, setting deliverables and establishing accountability to ensure their visions are brought to life.

The Visionary Followers, Steady Achievers and Platform Builders all have the opportunity to learn from the characteristics of the Innovative Leaders.

The Visionary Followers (Norway, Australia, Finland, the Netherlands and the United Kingdom) are lagging the early leaders on two counts; sophistication and administrative simplicity. These factors have enabled the Innovative Leaders to place some distance between themselves and the next grouping.



research findings

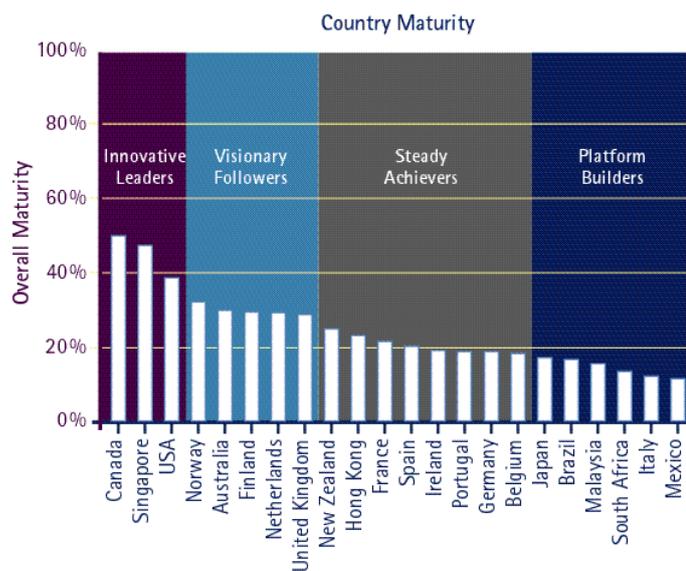
Visionary Followers, as the category suggests, have expressed their vision for eGovernment, but have been marginally slower to translate this vision into sophisticated online service delivery for their citizens.

The Steady Achievers (New Zealand, Hong Kong, France, Spain, Ireland, Portugal, Germany and Belgium) are making sound progress toward eGovernment implementation. As a group, however, they either have less ambitious implementation plans, have not yet attempted to integrate sophisticated delivery techniques, or are yet to increase the volume of complex transactions as the Innovative Leaders and Visionary Followers have done. Accelerated development by other countries, that were aspiring leaders in the last round of the research, to this group.

The Platform Builders have only recently embarked on their eGovernment journey. Complex political environments, recent changes in political leadership, administrative inertia, immature infrastructure and geographically dispersed populations are all factors that have, to varying degrees, inhibited their ability to make significant progress.

The individual country reports provide greater detail on the initiatives underway in each of these countries. Encouragingly, in this group we found that some of the boldest visions have recently been outlined to accelerate progress toward eGovernment.

The Platform Builders group of countries has had an excellent opportunity to learn from other countries in the research in terms of how best to proceed with implementation. For example, in countries like Brazil, initiatives such as the establishment of 250,000 Points of Presence will enable citizens to access government services online from public kiosks as well as on the Internet at home. This is not an isolated example, but it goes to prove that the development of eGovernment must take into account social equity issues in those countries that are only starting to progress up the eGovernment maturity curve.



Themes in eGovernment Leadership

Four key themes emerged from the research:

1. Reality is catching up with rhetoric.
2. Government online is moving up the maturity curve, but still has a long way to travel.
3. Portals are emerging as the new eGovernment single points of access for citizens and businesses.
4. The eGovernment landscape will be unrecognisable in two to three years time.

Reality is Catching Up with Rhetoric

Any transformation programme must begin with the rhetoric of the vision in order to garner support for the journey ahead. eGovernment programmes have all been launched with a great deal of rhetoric about the new ways governments will interact with citizens and businesses.

In the year 2000 research, we concluded that the gap between eGovernment rhetoric and the reality of eGovernment was substantial, with many governments having articulated a vision but making little progress on implementation. In this year's research we found that the gap is closing, albeit slowly, as governments are beginning to build momentum in the implementation of their vision statements.

Separating eGovernment plans from generic government Information Technology programmes has been the key to focusing on and kick-starting specific eGovernment initiatives to deliver traditionally paper-based services to citizens and businesses online, and thereby increase customer service.

One example is Portugal's *Society of Information 2000-2006* programme, which encompasses elements of eGovernment development around social requirements and broader technology access issues. Others include the Netherlands' *Electronic Government Action Plan*, and Australia's *Government Online* strategy.

The research found there are some common elements in the development of successful eGovernment programmes.

There must be visible and committed leadership within both the political and administrative arms of government. The right infrastructure and implementation programme, with clear accountability for results, is crucial. The countries that made the greatest progress in the research have done so through the combination of a clear policy statement, set deliverables and a timetable. They also have the framework for an authentic eGovernment strategy.

Perhaps the biggest misnomer about eGovernment is that an agency has an eGovernment strategy if it has a website. A true Internet strategy examines all aspects of the business model, interactions with customers and stakeholders, and identifies

those areas where more value can be created for all stakeholders by moving processes and interactions online.

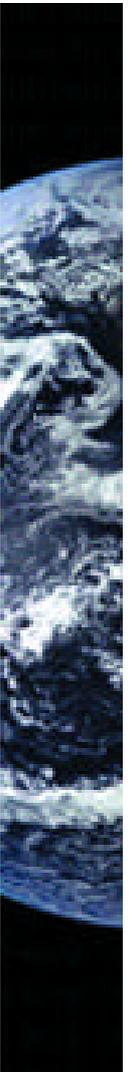
eGovernment has, in many cases, stalled at the most elementary level, the agency website. This is often because the vision and policy documents call for governments to be online while failing to give clear directives about the overall goals for the government's online strategy, or the need to adopt a citizen or business focused view of the world rather than a traditional agency approach.

Structure, in the form of an accountable agency to deliver eGovernment initiatives, is vital, and this is where the Innovative Leaders group excels.

Canada, Singapore and the United States all have a clear plan and structure within government to spearhead eGovernment development programmes, and have achieved their leadership position as a result of these programmes having been in place for several years.

Many other countries are now adopting this model. For example, in South Africa, development has been very slow, however a structure is now being established, through the appointment of a Chief Information Officer, which should accelerate progress. New Zealand has set up a specific government unit to drive eGovernment, one that complements and augments an existing committee of senior civil servants.

Governments are now elevating the importance of their eGovernment policies through creating new implementation structures, such as new positions and agencies attached to the highest level of office, rather than delegating implementation to individual agencies. This is a significant organisational change and is a concrete sign that governments are getting serious about closing the gap between rhetoric and reality, and that they have recognised the challenges inherent in any initiative whose success depends largely upon cross agency co-operation.



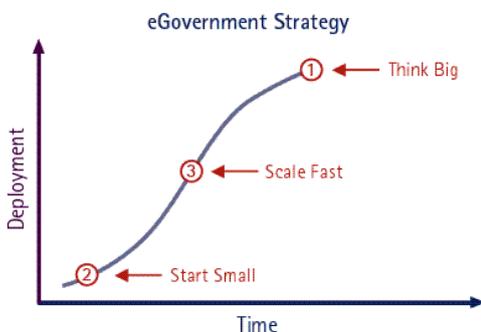
research findings

Government Online is Moving Up the Maturity Curve, but Still has a Long Way to Travel

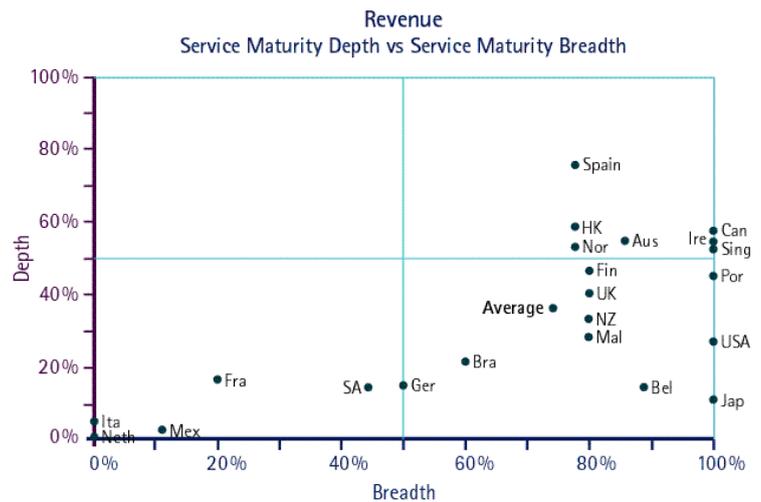
The eGovernment maturity curve is our primary measure of progress in electronic service delivery. In putting services online, governments typically start with simple publishing, then move toward greater interactivity, and ultimately transaction capabilities.

The year 2000 research found the majority of governments, having outlined their vision, were only publishing information on the Internet, and had not yet progressed to providing interactive or transactional capabilities.

This second round of research found evidence that governments are moving up the maturity curve, but still have a long way to travel to reach full online maturity. Only in isolated cases has online service delivery moved all the way up the maturity curve, enabling citizens to complete entire transactions with government, such as paying taxes or claiming benefits, online.



Revenue agencies are a good example of significant progress being made. Governments have much to gain from moving revenue processes online; collections are accelerated, processing costs reduced considerably, and compliance increased.



Countries such as Hong Kong, Ireland, Portugal and Spain have already maximised the online maturity of some of their revenue processes, enabling citizens and businesses to calculate tax liability, file their taxation returns and receive refunds, all without having to visit a revenue office or submit any physical documentation. Conversely, of the six countries in the Platform Builders group, revenue services were amongst the least mature.

Revenue is the exception rather than the rule. In most sectors published information is extensive, but the ability to interact with government online, and ultimately to complete transactions, remains limited.

Developing Internet maturity requires following the fundamental strategy of building eGovernment presence; thinking big, starting small and scaling fast. These rules apply equally to government as they do to the commercial world. There is ample evidence of big thinking in government vision statements, and of starting small with modest publishing efforts.

In the 2001 eGovernment Leadership research, the most impressive developments have been in those countries that have implemented eGovernment using the think big, start small and scale fast model. For example, Norway, Ireland, Belgium and Brazil have all moved significantly in their level of maturity.

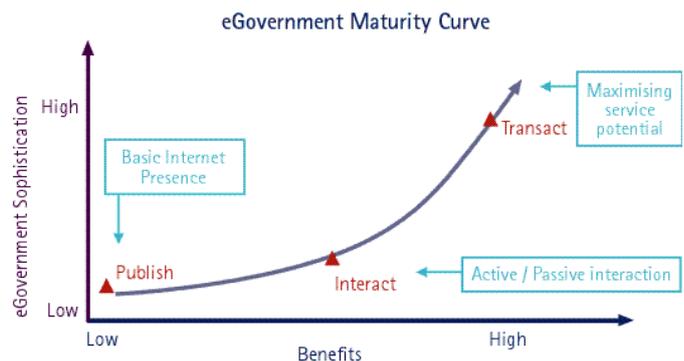
Even in the most advanced countries scaling fast remains an issue. While it is easy to replicate existing processes, however cumbersome and unwieldy, governments continue to struggle with the challenges of trying to deliver services that require interaction with more than one government agency.

Provision of eGovernment services undoubtedly offers several efficiencies as well as the opportunity for increased customer service. Internet transaction costs, particularly for relatively uncomplicated transactions, are substantially lower than their clerical equivalents. These savings will allow resources to be re-directed towards those citizens and businesses that are in need of specialised or resource intensive support. However they will only be realised if the governments continue to increase their online maturity, and persuade citizens and businesses to interact with government over the Internet where possible. Offering a wide range of easy-to-use and value-added eGovernment services will be an important factor in achieving this.

There is evidence of governments experimenting with multiple access channels as a means of overcoming digital divide issues. For example, in addition to Internet access, the South African Government is providing access to services through kiosks and public libraries.

One critical element in the significant change in ranking for some countries is the new metric in this year's research, Delivery Maturity.

Delivery Maturity is broadly a measure of the sophistication of online services; the extent to which governments are incorporating techniques such as customer relationship management, intentions based design and portal models in their online delivery. This measure recognises those countries that have moved beyond focusing on the sheer magnitude of government online and are now aiming to maximise value to their citizens and businesses by ensuring government online is easy to find and to transact with.



The elements of Delivery Maturity governments are now introducing are already established in many areas of the private sector. For example, online banking has matured exponentially in the past two years to the extent that customers can now pay bills, transfer funds and get a mortgage approved online. Information about the customer, their banking profile and requirements is stored and activated each time the customer visits the site, allowing personalised services and marketing tailored to individual customer profiles.

The Delivery Maturity scores generally showed that those countries with a high Service Maturity Depth also achieved a higher Delivery Maturity, indicating they have successfully combined placing a significant number of services online with applying these techniques. There were exceptions, with both the United States and Australia scoring highly in aspects of Service Maturity yet having low Delivery Maturity, indicating their focus has been primarily on volume rather than sophistication.

All governments surveyed have, however, a long way to travel to achieve full Internet maturity. Even the Innovative Leaders are less than 50% of the way on this journey, and a number of the Platform Builders have yet to make their first serious inroads into eGovernment. While a website for a private company may be an essential tool of business, for government the priority has, of necessity, been identifying the optimal way to move services online, while retaining current service standards and ensuring citizens and business have unfettered access.



research findings

The research showed that all in 22 countries, the vision of eGovernment has been thought out and documented. It remains now for governments to build momentum in their eGovernment programmes and steadily move up the maturity curve.

Portals are Emerging as the New eGovernment Single Points of Access for Citizens and Businesses

The emergence of government portals is the most significant development observed in this round of research.

eGovernment vision statements have, in the majority of cases, set deadlines for agencies to have an online presence. The outcome of this approach has been a plethora of websites, many with only published information about the agency and its services, delivering limited value to citizens. This website proliferation has not made it any easier for people to do business with government, as agencies have simply replicated industrial age organisation structures online, without any attempt to consider how the user will behave online as opposed to when they were in-line. Private sector experience has shown that consumers behave differently in the online world; in the one-to-one environment of the Internet, they seek providers who organise services around their needs.

Government portals are now emerging as the means of bringing some order and citizen-centred functionality to government online. Sites such as www.firstgov.gov, 'Your first click to the US Government', attempt to provide a single gateway for users to all government websites, and are organised around the information the user is seeking, as opposed to the name of the agency, its services, or the tier of government responsible for that service.

An excellent example of a government portal is www.canada.gc.ca, which provides a single gateway to a broad range of government services, based on whether the user is a citizen, business or non-Canadian.

In the private sector, portals first emerged as the entryways to the Internet, bringing some organisation to the web's chaos. Governments are now beginning to follow this path. The first private sector portals functioned as search sites, but have now entered a new era of sophistication, adding new services and features with the goal of becoming the user's home page, their entry point to other sites and the location they visit daily.

The leaders in eGovernment will be those countries that fully exploit the portal model. The potential to transform service delivery through adopting an intentions based portal has yet to be fully realised by the governments surveyed. Today's eGovernment portals are unsophisticated gateways that do little more than direct the visitor to another government website.

An intentions based portal is the key to overcoming one of the most significant hurdles of eGovernment implementation; lack of cross agency co-operation. Entry to agency services is through a user-friendly intentions based homepage, and this intentions based design extends into the vertical applications, transforming them into virtual agencies that hides organisational complexity. This approach creates virtual agencies, which cluster functions related to customer needs, regardless of the responsible agency or branch of government. A cross-agency, intentions based approach to service delivery represents a marked change in the nature of government and will require organisational and cultural change if it is to become reality.

However the benefits are manifold. The power of this model is its potential to truly connect governments with their citizens and businesses, drive up the levels of customer service which governments can offer, and also to build public-private partnerships to deliver integrated services to citizens.

There are numerous possibilities for private sector partnerships and collaboration. For example, in the United States, the Delaware Treasurer's office has teamed with a private sector fund manager to provide better pension information. Governments are now considering portal models that have different zones, for example commercial free internal zones for service delivery, supported by an external or partner zone that allows advertising.

By harnessing portal technology, Governments can meet the demands of citizens and businesses for greater service levels, concentrating on what their customers want to achieve rather than what agencies intend to deliver.

The eGovernment Landscape will be Unrecognisable in Two to Three Years Time

The Governments surveyed are experimenting with a range of political and administrative structures to provide leadership for, and build momentum in, their eGovernment programmes. The fundamental challenge all governments surveyed are facing is how to create a model that provides a framework within which all agencies can work, targets achievable goals and specifies deliverables to which all agencies can commit.

The research shows that agency initiated eGovernment efforts have hit a formidable wall of implementation barriers, solidified the gaps between agencies and reinforced the silos that technology has the power to transcend. As a result, online government has failed to live up to the increased expectations of citizens and businesses which have derived limited benefits from eGovernment programmes other than access to a wealth of information online.

The majority of the governments surveyed have set ambitious plans for implementing eGovernment, with time horizons concentrated in the next two to three years, during which time aggressive goals have been set for transforming service delivery mechanisms.

Many of the early government plans incorporated relatively slow implementation timeframes with agencies given several years to add online delivery capabilities. Those times have now passed.

The ubiquitous nature of eCommerce in the new century, an increasingly connected citizenry accustomed to 24x7 service, and the importance of technology literate government to business investment have created an environment in which speed of implementation has rightly assumed far greater importance.

Countries which have a well-developed eGovernment programme are starting to reap the benefits. The next three years will prove whether their peers in the eGovernment Leadership research can attain those same benefits.



Overall Maturity Visionary Followers

Rank 5th

Service Maturity Marginal

Delivery Maturity Very Low

Strengths

Ninety percent of the 130 Federal Government agencies covered by the Government Online Strategy are confident of achieving an appropriate online presence by December 2001.

Opportunities

The fundamentals of Service Maturity are in place, but there is significant scope for improving the level and Delivery Maturity of online services.

Site to visit

The Department of Employment, Workplace Relations and Small Business (DEWRSB) site, www.dewrsb.gov.au is functional, informative and easy to navigate.

Australia_

Australia's progress in the past 12 months was solid if unspectacular, thereby allowing Canada and Norway to overtake it in overall rankings as they developed more strongly in both Service Maturity Overall and Delivery Maturity.

It was in the Delivery Maturity rating in particular that Australia has not moved forward rapidly, and with a rating of just 20.00%, against a global average of 29.39%, it was placed in the Very Low category for this metric.

Increasing Delivery Maturity through the development of intentions-based portal design and citizen, rather than agency focused service delivery will be the key to reasserting a global leadership position.

Australia was fourth in Service Maturity Overall, mainly due to a Service Maturity Depth score of 43.78%, which indicates that it has developed more services toward their maximum potential than its closest rivals. This is, in part, the result of solid development at a Publish level with several agencies, notably DEWRSB and the Australian Taxation Office, now beginning to offer online services at Interact and Transact levels.

Australia has a government structure where many services are devolved to the state level, for example, policing and many education services.



There were some stand-out agencies in the research... in particular the Human Services segment

Of the 165 services surveyed, 41.21% were the responsibility of Federal Government.

The services which were the responsibility of the Federal Government were generally delivered well. More than 25% of all services provided by the Federal Government had gone beyond Publish into the Interact and Transact categories, a sign of growing acceptance and utilisation of the eGovernment concept.

There were some stand-out agencies in the research. In particular, the Human Services segment performed extremely well, globally topping both the Service Maturity Depth and Service Maturity Overall categories. This is largely due to the significant online presence of DEWRSB, which has started to gain maturity beyond the Publish level, particularly in some of its employment and business information services, such as allowing both public and private sector employees and employers to file work vacancy details online.

The other major agency to actively pursue online solutions was the Australian Taxation Office. The issues surrounding tax assessment and payment are complex, particularly with the introduction of a Goods and Services Tax in 2000, yet there has been a concerted effort, particularly for citizen services, to develop an online presence.

The online delivery of business services has proven more difficult, although with several major projects in the pipeline this position is likely to improve during the next 12 months. There were also some individual agencies that scored well, despite a limited online presence within the scope of this research. These included the Australian Bureau of Statistics and the Parliament of Australia, which have both developed citizen-focused sites, while the limited number of education functions the Federal Government performs were also well represented, if only at a Publish level.

The Government has also made progress in implementing eProcurement services for government contracts and tenders. This is one of the key areas in which the Federal Government could use the Internet better and one which it should continue to pursue because of the significant long term financial and productivity benefits it offers for individual agencies and the government as a whole.

What is needed now is a concerted push both at policy and agency level to break through into the next stage of development as the leading countries started to do during the past 12 months.

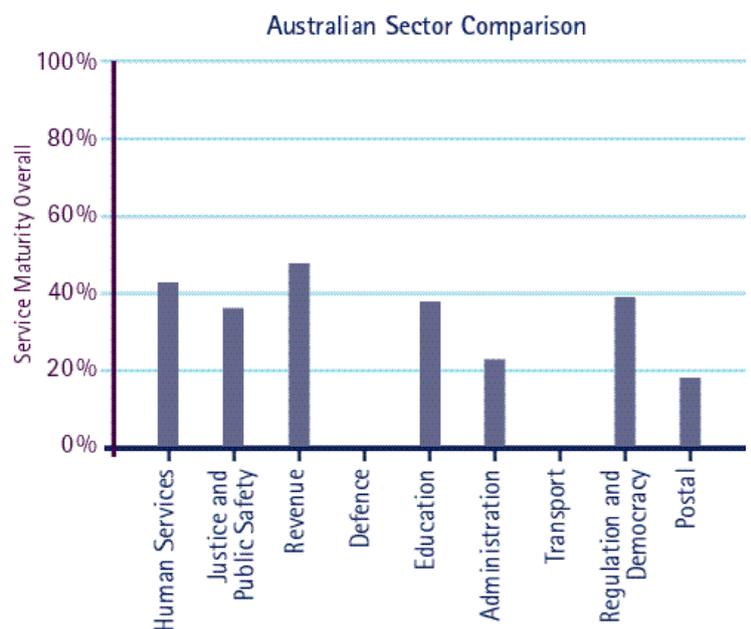
The catalyst may well be the implementation of the *Government Online* strategy released in April 2000, which has a clear plan and timetable for 130 Federal Government agencies. This initiative could, if successful, drive Australia to a leadership position in eGovernment development.

In addition, there is a policy directive to ensure these online services are citizen-facing, rather than structured around government, and available through a single point of access.

There are few regulatory barriers to development and as long as the legislative framework can be tailored to ensure growth, the impending eGovernment initiatives should move Australia quickly up the maturity curve.

Despite the vision in the *Government Online* strategy, some ambiguity remains, making it difficult for agencies to deliver citizen-centric services. What has not been articulated clearly enough is the end point. This lack of clear definition may allow individual agencies to proceed at their own pace and use their own definitions of 'appropriate', thereby jeopardising the overall policy.

The next 12 months will show whether government agencies can deliver on their promises and make dealing with them quick, easy and conclusive for citizens and businesses alike.



Insufficient services measured in Defence and Transport sectors

Belgium_

| | |
|-------------------|------------------|
| Overall Maturity | Steady Achievers |
| Rank | 16th |
| Service Maturity | Low |
| Delivery Maturity | Very Low |

Strengths

Progress has been made getting services online at Publish level.

Opportunities

Progress will be enhanced by ensuring connectivity and co-ordinated development between government agencies.

Site to visit

The Belgian Government site www.belgium.fgov.be starts with language choice, and then clear options to access government information.

Belgium's eGovernment policy was launched when the new cabinet took office in July 1999, allowing significant work to be done at an individual agency level across different tiers of government.

The key to Belgium's eGovernment growth during the past 12 months has been the breadth of development, stemming from a concerted effort from Federal Government agencies to get fundamental information online.

While Belgium has not moved up the ranking significantly, there has been solid progress. There has been an increase in Overall Maturity (from 5.63% to 18.62%), although no services are yet classified at the Transact level, with the Administration and Regulation & Democracy sectors at the forefront.

Belgium now takes a place in the group of eight Steady Achievers, and is just 0.45% away from 13th ranking. This is an exceedingly small margin given Belgium's current development profile.

What has yet to be achieved, and which may deliver exponential growth in this research next year, is greater depth and maturity of services.



Belgium has crossed the first hurdle by having a well-articulated plan

The Revenue sector in the 2001 study bears this out. When compared to the other 15 countries with a Revenue Service Maturity Breadth score of greater than 50%, Belgium has the second lowest Service Maturity Depth, indicating that while there is a large amount of information online, there has only been minor penetration of Interact and Transact service potential.

The most obvious examples of those services measured were online tax payments. In most countries within this research, there is information about tax payment readily available. The next step for these countries, including Belgium, will be to develop these services to ensure they can be delivered online at the Interact and Transact levels so that citizens and businesses can pay a variety of taxes online in a secure environment.

The same applies in the Regulation & Democracy sector. To a large extent, the services the Government could provide online have been provided. But again, the next crucial step is developing these services to give maximum utility for citizens and businesses. One example is electoral issues where some information has been published, but very little of what could be interactive has been developed to that point.

For other agencies, such as Justice & Public Safety, there were a limited number of services offered at a national level in this research, but all showed at least some effort to get information online, for example, some of the judicial and court based functions.

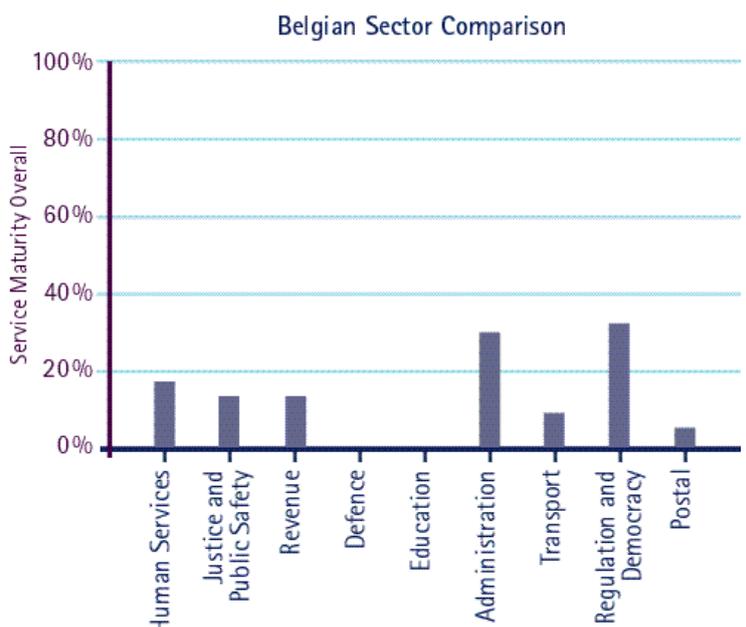
The Delivery Maturity score of 20.00% was less than the 29.39% global average, but this can be regarded as a natural outcome of the strategy to Publish and have an Internet presence before concentrating on inter-linking government sites and adding extra utility to the existing sites. On past experience, as the Service Maturity Depth increases, so does Delivery Maturity.

The major contributor to the Delivery Maturity score was the Belgian Government site www.belgium.fgov.be which offers visitors, in any of four languages, a range of options from general data about the country to more specific information on government functions. The next step must be to create more citizen-focused and value-added services, most probably in the areas of Revenue and Human Services.

Societal factors also influence the development of eGovernment, and in this regard, Belgium faces a unique government structure with many of the traditionally centralised services devolved to cultural and regional authorities. This structure does not penalise Belgium in terms of this research, but does highlight the different leadership role the Federal Government must take, focusing on policy and structure rather than content.

The Federal Government has maintained the core functions of government and central to this is the *Copernicus* programme, launched in July 1999, which aims to transform government to improve the quality of services it delivers online. eGovernment is inherently a key part of this policy, even to the extent of driving development across the three levels of government, despite the autonomy held by the regions and communities.

This policy development must be transformed into action. Belgium has crossed the first hurdle by having a well-articulated plan. Belgium has in place the key ingredients to make significant strides in eGovernment Leadership - a solid platform of online information, a broad growth plan to follow, and a degree of commitment to the task at a federal level. As long as timetables and clear goals can be set and adhered to, Belgium is likely to make considerable progress in the next 12 months.



Insufficient services measured in Defence and Education sectors

Brazil_

Overall Maturity Platform Builders

Rank 18th

Service Maturity Low

Delivery Maturity Very Low

Strengths

A concrete mandate for eGovernment development.

Opportunities

Continue to develop both breadth and depth in online service offerings and increase Delivery Maturity.

Site to visit

The Brazilian Government portal, www.redegoverno.gov.br, a clearly presented, easy to navigate site that has links to 650 different government services. The Government eProcurement site, www.comprasnet.gov.br was launched in December 2000.

Brazil is in the process of implementing a new administrative model with the goal of computerising the civil service as of 2001. While some of the initiatives are aimed at the structural issues in government, this is coupled with a drive to ensure that government agencies form a significant online presence.

In common with other countries in the early phases of eGovernment development, Brazilian Government agencies are developing an online presence through the publication of data and information rather than fully utilising the potential the Internet offers in providing Interact and Transact services.

Brazil's progress has been based on an increase in the Service Maturity metrics. Indeed the Service Maturity Overall score was higher than the six countries immediately above it in the research, showing a strong commitment to at least get information online at the Publish level as well as increasing the sophistication of services that are already established.

The major factor which inhibited a larger move up the rankings was Delivery Maturity, which was the lowest in the research.



The key to sustained government development hinges on Brazil's Electronic Government Policy

As much of the existing online presence has been developed at agency level, there has been little emphasis placed on co-ordinating a Whole of Government approach, although this may become more apparent as the new administrative model is implemented. The key will be to meet the timeframes announced in the Government strategy, and ensuring the further development of the Government portal enhances the user-facing services available for both citizens and businesses.

Brazil was rated highest in the Transport sector of any country (with significant Service Maturity Depth and Breadth) in the research. The other government sector which performed soundly was Administration, largely due to the Interact and Transact capabilities developed in the area of eProcurement. This is partly due to the launch of www.comprasnet.gov.br in December 2000, a site which has potential to offer strong government business services, as it develops and becomes more sophisticated.

There are also some excellent opportunities for government agencies to build on an established online platform. In the Revenue sector, tax information is available online, and although planned, the capability for tax payments to be made electronically has yet to be developed.

In Human Services some functions can be performed at Interact level, but many, with the potential to reach Transact status, are still at the Publish level, notably in the social services area.

The key to sustained government development hinges on Brazil's Electronic Government Policy to computerise the public service from the beginning of 2001, both internally and by creating a more robust online presence. Given the scope of the project, it has an ambitious deadline, with a target of having all government services online by the end of 2002. This would indicate a push to ensure material is at the Publish level, as is common with many other countries at a similar stage of development, evidenced by the 650 Internet sites already offered by the Brazilian Government agencies.

Herein lies the greatest opportunity especially if Brazil is to increase its Delivery Maturity and therefore the utility of its online presence to citizens and businesses.

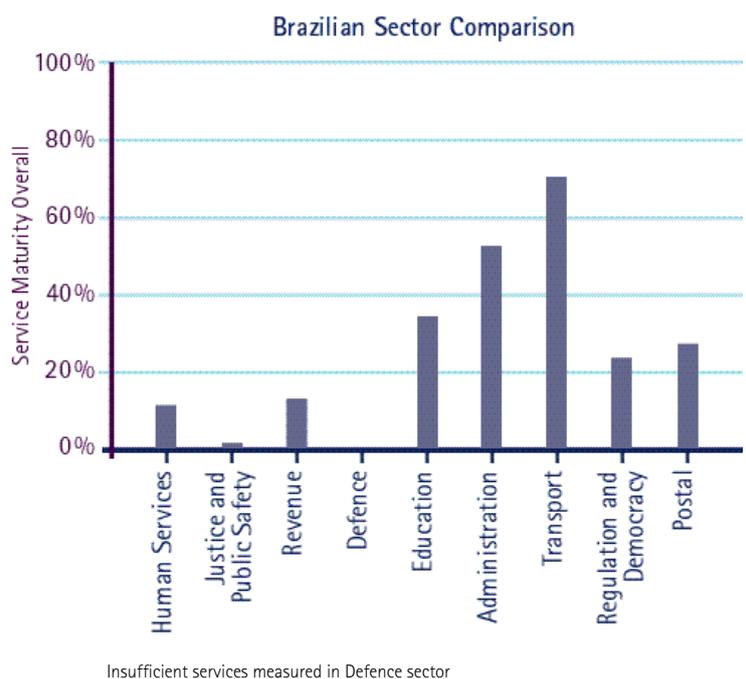
While the platform is already in place, it is crucial the Government ensures that the next stages of development, while not being slowed, are co-ordinated and consistent across all government agencies. There are plans for the creation of an

infrastructure linking Internet services of Federal, State and Municipal Governments. To progress the Central Government must ensure this is the over-arching premise in all development to ensure consistency with its drive to web-enable government.

Government services going online include government purchasing, a structure to facilitate the electronic payment of taxes and the legalising of electronic documents (by December this year), while other agency initiatives are underway in the Human Services, Health and Education fields. The end game is the elimination of paper use for government documentation by 2006.

But perhaps the boldest initiative being undertaken is to create 250,000 Points of Presence (places where citizens can access government services online) throughout the country to ensure that the maximum number of Brazilians are able to share in the benefits of eGovernment. This linking of social requirements to an information technology based policy is something few other countries have articulated in their eGovernment programmes and reflects Brazil's goal of addressing the digital divide issues inherent in any eGovernment development.

The next 12 months will be crucial for Brazil. The country is at a point where with a concerted effort, the eGovernment initiatives planned can begin to make an impact on government, citizens and businesses.



Overall Maturity Innovative Leader

Rank 1st

Service Maturity Moderate

Delivery Maturity Moderate

Strengths

Citizen-focused vision and implementation.

Opportunities

Develop seamless interaction across departments.

Site to visit

The Canadian Government site www.canada.gc.ca is the single entry point for government services.

Canada_

Canada has secured the number one position in eGovernment Leadership for 2001, overtaking the United States and Singapore. This can be attributed to the commitment from the Canadian Government to break open the traditional departmental approach to online service delivery and instead place the needs of citizens and businesses at the core.

While countries such as the United States, Singapore, Australia and the United Kingdom have articulated similar citizen-focused philosophies, Canada has begun to turn rhetoric into reality.

Government On-line is the plan that outlines the Prime Minister's commitment to make the Government of Canada the most electronically connected government in the world by 2004. The central objective is to make it easier for citizens and businesses through one-stop access points, with services and information organised by theme or type of activity.

However, this ambitious programme cannot be realised unless all Federal departments come together to plan, implement and collectively deliver on the reform agenda.



Canada recognised early that to implement an eGovernment strategy successfully, a co-ordinated approach was necessary

Canada recognised early that to implement an eGovernment strategy successfully, a co-ordinated approach was necessary. The Treasury Board now holds primary responsibility for driving the programme and relies heavily on cross-departmental task forces to co-ordinate and communicate on action. This is the major point of differentiation between Canada and the other Innovative Leaders, Singapore and the United States.

Of the 57 services surveyed that the Federal Government could provide online, 48 are delivered to some degree over the Internet, giving a Service Maturity Breadth of 84.21%.

Canada's Service Maturity Depth score, which indicates the maturity of services delivered over the Internet, is 54.23%, which stands out from its nearest rival, Singapore, that scored 51.91%. Twenty of the 48 services are implemented at Publish level, 16 are implemented at Interact level and 12 are implemented at Transact level. Of the Transact capabilities, the majority relate to procurement, payments and filing and have the common characteristic of cutting across the Whole of Government.

Overall, Canada's new leadership standing is due less to the provision of additional services in the past 12 months than to the development of sophisticated customer relationship management techniques, intentions-based design and a single point of entry to information. Canada scores 60.00% for Delivery Maturity compared to the country average of 29.39%. Although the United States and Singapore compete with Canada for leadership honours on several Service Maturity metrics, at 20.00% and 53.33% Delivery Maturity respectively, a gap appears.

Canada's Delivery Maturity score is largely a reflection of the Government's recent launch of the Canada portal at www.canada.gc.ca. This information and services gateway focuses on target groups - Canadians, Canadian Businesses and non-Canadians and the requests they have of government. Links are provided to major government agencies and there is an attempt to maintain a consistent look and feel throughout, to the point of interface with the individual agency sites.

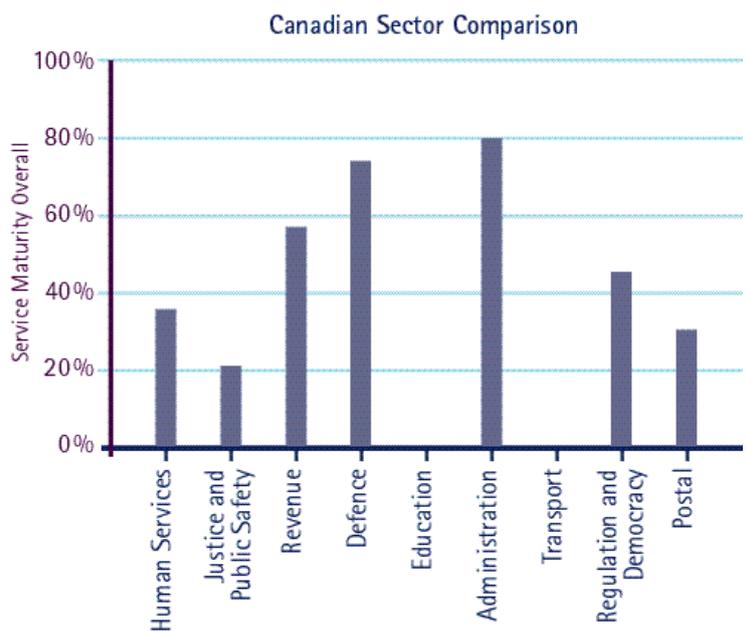
Canada's Whole of Government development strategy has enabled individual agencies to keep pace with each other and leverage capabilities. Individual agencies are also cross-referencing, where possible, with the most obvious, a link to the Canada portal.

The Department of Defence is an advanced user of eProcurement and online recruitment, as are the Departments of Public Works, Government Purchasing, and Health Canada. The Department of Elections site at www.elections.ca has leveraged the Canada Portal experience by organising its content around topics of interest and intentions or questions citizens may want to ask of the Electoral Commission.

Canada has recently selected a vendor consortium to implement a secure channel for hosting Internet-based online government services. It is also in the process of setting up a standing offer to qualify vendors to assist departments with implementing government services through the Internet.

Canada is now a recognised eGovernment leader. The key to retaining this position for the Federal Government over the next 12 months will be the continuation of the development of Whole of Government initiatives, and to remain focused on customer relationship management best practices.

No one government has yet reached its full online potential. If the Canadian Government can harness the potential of the ever changing technologies and innovative public private partnerships and ensure increasing citizen demands are met, there is no question Canada can maintain its eGovernment Leadership position.



Insufficient services measured in Education and Transport sectors

Overall Maturity Visionary Follower

Rank 6th

Service Maturity Marginal

Delivery Maturity Low

Strengths

Online payment capabilities, authentication and security, Postal sector.

Opportunities

Dedicate responsibility for online agenda to one supervisory organisation, set definite targets and deliverables based around citizen needs. Continue to leverage private sector capabilities.

Site to visit

<http://virtual.finland.fi>, a useful site operated by the Ministry of Foreign Affairs, which gives insights into Finnish life and culture.

Finland_

In Finland, the Government is making a major effort to leverage commercial best practice and meet consumer demands. This powerful combination has driven Finland, which is entering the eGovernment Leadership research for the first time, to a solid overall ranking of sixth out of 22 countries.

Since 1995, the Finnish Coalition Government has publicly committed to the development of an Information Society; among its goals, the *Finnish Information Society Strategy* aims at ensuring citizens and businesses have access to a broad range of government services online. However, each agency in the strong Federal structure continues to set its own agenda, pursuing its own opportunities.

As a result, Finland shows pockets of online innovation but this is offset by unco-ordinated agency activity, largely focused on government structures, not the needs of users.

Of the 146 services the Finnish Government could provide online, 76.71% are delivered to some degree. This reasonably high Service Maturity Breadth places Finland behind nearby countries of Norway and Netherlands, but ahead of European counterparts Germany, Belgium and France.



**In Postal services
Finland demonstrates
its most mature online
service delivery**

In Service Maturity Depth, Finland scores 40.67%, well above the global average of 31.00%. Driving this ranking is Finland's capacity to offer a high number of transactional services, particularly around payments and authentication.

Government advances in payment, security and authentication can be largely attributed to the country's banking sector, which has driven the development of sophisticated systems that interact directly with government amongst other service providers. At the same time, consumer take-up of mobile and Internet banking is high, placing greater expectations on government service delivery.

While there are extensive options existing on most Finnish Government sites, the ability to complete entire service requests online is not consistent.

For example, in Finland, if a business wants to register job vacancies, it can obtain information online and interact with the agency, however, it cannot complete the whole process. For Finland to rise in its eGovernment standing, it will require the extension of services that are already partly available.

In Postal services Finland demonstrates its most mature online service delivery. The www.posti.fi site was able to fulfil the majority of service requirements posed in this research. Visitors can pay utility bills online by using their bank's payment function integrated to the postal site, order online postal products, send electronic mail and change address online. This ranks the Postal service as not only the leading online public service provider in Finland, but also positions it as a world leader, just behind Netherlands and the United States.

The online payment capability offered by commercial banks and widely applied in all businesses is a leading feature of Finnish service providers. The Revenue, Transport, and Administration sectors have the systems and security in place to encourage online payment of parking fines, authentication of signatures, purchase of bills and documents, and payment of corporate, income, property and sales taxes.

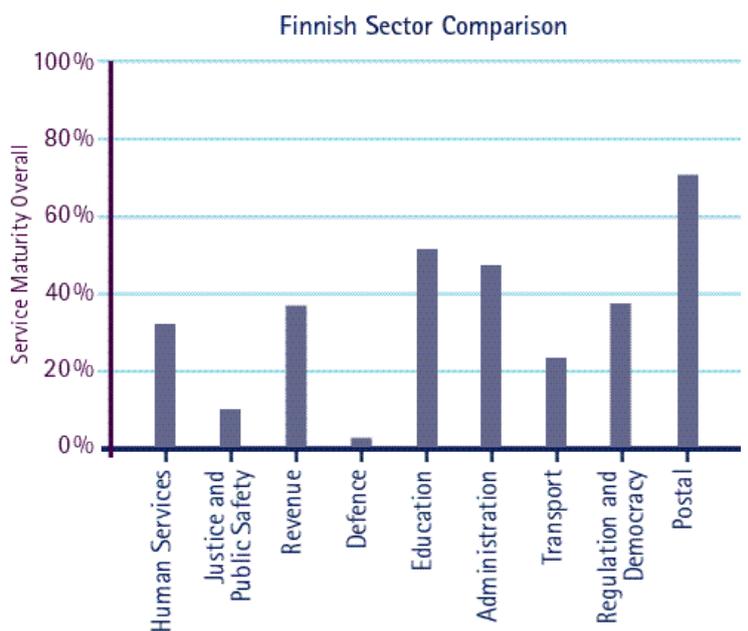
The other online services to stand out are related to Education. Online education services are widely offered and extend beyond the simple publishing of information. Students can take a high school course online, enrol online, submit and receive transcripts and interact with professors.

The greatest opportunity for Finland to advance its eGovernment Leadership position is from the reorganisation of services around the citizen or customer.

Websites for the Finnish Government are still organised around government agencies, or the internal structure of government, and not for citizens. As a result, Finland is positioned toward the bottom of the table in its Delivery Maturity ranking.

Overall, the Government of Finland has made good use of the Internet for information sharing and online payment and authentication services. To be considered an eGovernment leader, the Government must dedicate responsibility for its online agenda to one supervisory organisation, set definite targets and deliverables and measure progress toward these goals. This is a model that has served well in Canada, Singapore and Australia, countries that are strong performers in this research.

By continuing to leverage private sector best practice, Finland will be in a strong position to provide seamless online delivery across all services. Finland is one to watch in the emerging mobile government space. Already, a significant amount of business in Finland is conducted using mobile devices, and with strong public/private sector relationships, this trend is likely to drive more advanced government capabilities.



Overall Maturity Steady Achievers

Rank 11th

Service Maturity Low

Delivery Maturity Low

Strengths

Solid foundation for eGovernment.

Opportunities

Accelerate depth of services online.

Site to visit

www.service-public.fr offers access to the sites of all French Government departments and institutions.

France_

In early 1998, French Prime Minister Jospin launched an ambitious programme to develop eGovernment initiatives in France. Close to US\$1 billion of investment funding was allocated, and two agencies, the MTIC and the DIRE, were established with the stated objective of supporting and measuring the progress in implementing eGovernment programmes. Importantly, the two agencies were also charged with facilitating cross-agency links and services.

Boosted by this initiative, the number of government websites at the national and local level has recently grown, with a range of services focusing on providing information to citizens and businesses. A management mechanism, through DIRE, evaluates the overall progress in both central and local administrations and for the second half of 2000, the number of websites grew from 1600 to 2600 in less than five months.

Despite this growth, government agencies in France are still limited in terms of depth and breadth of services, with few Interact and Transact services being available online. In the overall rankings for this research, France has been overtaken, notably by Norway, New Zealand, Hong Kong and the United Kingdom, which have shown a greater rate of development.



This is partly due to France's limited ability to couple technology with innovation and deeper reforms.

Those countries behind France in the previous round of research have now moved ahead due to their more aggressive implementation timetables.

Overall, this situation places France in the Steady Achievers category, characterised by countries that are making solid progress toward moving government services online, but have yet to move up the Internet maturity curve with more sophisticated delivery. There is no correlation with government structure in this category as these range from the unicameral structure of Hong Kong to the complex central regional and local structures of France, Spain and Germany.

The shared characteristics of the Steady Achievers are reasonable, but not outstanding, progress in achieving a basic level of online presence. The majority of services are at the Publish level of Internet maturity.

France's low Delivery Maturity score, a measure of the sophistication of online services, influenced France's overall result. The score of 26.67% indicates there is still considerable scope for improvement in Delivery Maturity, and this is true of all countries surveyed as governments begin to learn how to take their online presence from a simple website to a true Internet strategy. The highest score in this category went to Canada, at 60.00%.

A key component of Delivery Maturity is the provision of a single point of access to government services online; www.service-public.fr provides this access for citizens and businesses and a few Central Government agencies have begun to pave the way for a second wave of initiatives. These include more sophisticated services in the Ministry of Finance, which in January 2001 launched its new portal for the broad array of services it offers www.minefi.gouv.fr, and in agencies such as the URSSAF www.net-entreprises.fr which is responsible for collecting social taxes from enterprises.



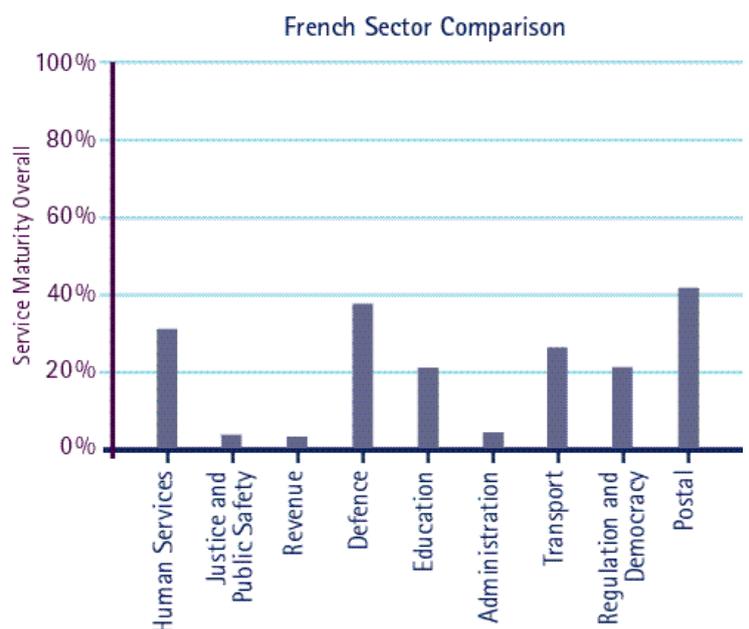
France now appears to be making the right moves to progressively improve its eGovernment position

There are few examples of sophisticated service delivery incorporating best practices from the commercial sector. In addition, these countries are now putting the governmental structures in place to better co-ordinate eGovernment implementation.

Service Maturity Overall for France was at 19.54%, the second highest in the Steady Achievers group. Service Maturity Breadth (the quantum of services online) was 60.94%, indicating that of the 128 services that were the responsibility of the central French administration, only 78 had some degree of online presence. This represents a significant opportunity for France to improve its position in the rankings. For example, in the Justice & Public Safety sector, only six of a possible 17 services that were the responsibility of Central Government were offered online.

Service Maturity Depth, the measure of where these services sit on the Internet maturity curve, was low at 32.06%, indicating a strong web presence through services being online at the Publish level, but few services available with Interact or Transact capabilities.

The issue of eGovernment is clearly on the leadership agenda, and France now appears to be making the right moves to progressively improve its eGovernment position.



| | |
|--------------------------|------------------|
| Overall Maturity | Steady Achievers |
| Rank | 15th |
| Service Maturity | Low |
| Delivery Maturity | Low |

Strengths
Solid performances from the Postal and Education sectors.

Opportunities
Central Government taking a leadership role in advising and co-ordinating eGovernment development at all tiers of government.

Site to visit
German Government homepage
www.bundesregierung.de contains news and general background information on Germany, has some portal operability and four language choices.

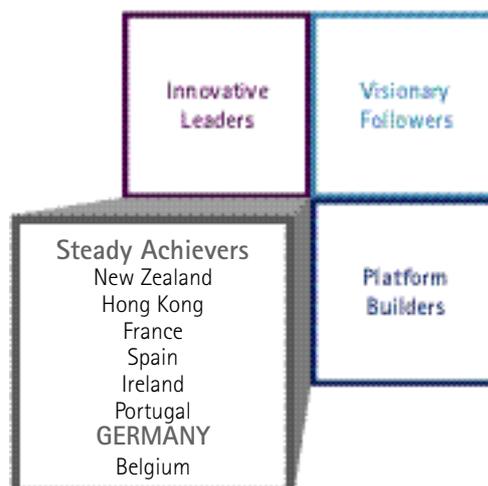
Germany_

As with many Federal Government systems, the impetus of the eGovernment drive in Germany is primarily at the Local and State levels. The role of the German Central Government can best be described as one of advising, when appropriate, these tiers of government to which most government functions have been devolved.

Given there is no specific central eGovernment policy platform, the agencies researched displayed a willingness to get their services online, but with a lesser degree of sophistication and Delivery Maturity than some other countries in the Steady Achievers group. Overall, there were only five services which achieved maximum maturity.

The emphasis of all agencies, Postal excepted, was to ensure there was an online presence at the Publish level rather than maximising the potential of the services at the Interact and Transact levels.

There were two sector groups which stood out in the research: the Postal and Education sectors.



While Deutsche Post has been partially floated on the stock exchange and therefore has a powerful commercial mandate, it is still included in the research due to its 50% government ownership. Widely regarded as one of the leading postal services in the world, Deutsche Post has been particularly strong in the online postal market, and of the eight postal services measured, five reached their maximum online potential.

The Education sector, despite a reasonably low number of services being offered at the Central Government level, has moved many of its services into the Interact level, although there was still some development potential to the Transact level available. In particular, the services offered for financial grants and assistance all scored within the Interact category.

In other sectors, most notably Justice & Public Safety, Revenue and Administration, the tendency

levels of administration. The opportunity may arise for the Central Government to take a more advanced role as a co-ordinating body for the various strategies and policies currently being developed and implemented on a largely ad-hoc basis by local governments. This might be particularly relevant for the smaller government bodies, and could steer development to a point where common web-based architectures and infrastructure are used.

Because of the unique German Government structure, a separate survey is being undertaken concurrently with this eGovernment Leadership research. This second research will focus on the development of eGovernment initiatives at the local tiers of government and will provide insights into the different stages of development major German cities have attained.



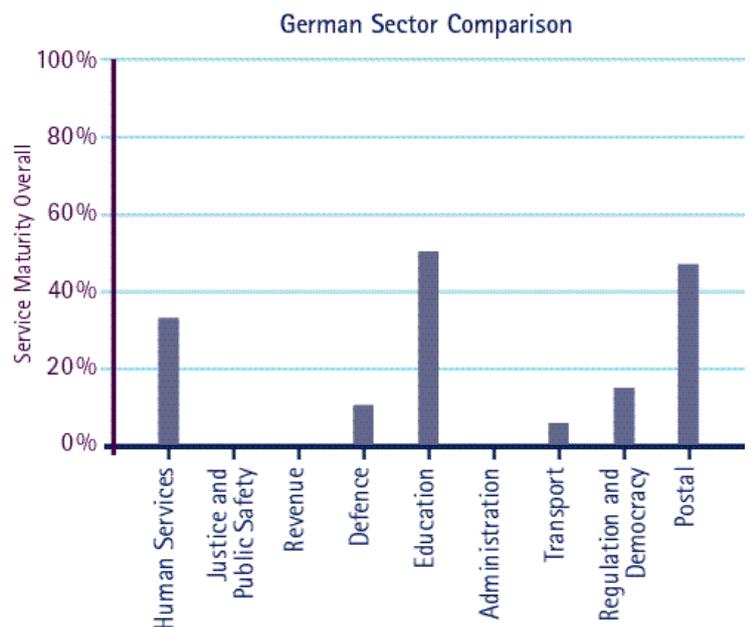
There is considerable potential for the Central Government agencies to develop existing sites to a level where they achieve their optimum level of utility

was to establish an online presence at the Publish level, without maximising the potential the Internet offers in those categories.

There is considerable potential for the Central Government agencies to develop existing sites to a level where they can achieve their optimum level of utility. A Central Government commitment to develop eGovernment capability will see greater co-ordination to achieve sustained growth across all areas of government.

eProcurement is a major area of opportunity. Already there has been a statement from the Central Government that by 2003, 25% of all procurement volume will be managed electronically. The platform for this development has already been laid with some measure of implementation undertaken both at Central and Local government level, and many other authorities planning to do so in the near term.

This opens up a secondary area in which the Central Government can ensure the continued development of eGovernment initiatives at all



Insufficient services measured in Revenue and Administration sectors

Overall Maturity Steady Achievers

Rank 10th

Service Maturity Low

Delivery Maturity Marginal

Strengths

Mature vision owned by a single agency.

Opportunities

To turn vision into action with particular focus on interaction and transaction capabilities to support the new Government gateway.

Site to visit

www.esd.gov.hk is the key initiative under the *Digital 21* programme to provide online public services and integrate them with those from the private sector.

Hong Kong_

Hong Kong maintained a position close to the average score across all measures of eGovernment Leadership and was ranked second in the Steady Achievers group behind New Zealand.

While the Hong Kong Government is promoting wider use of information technology to help increase efficiency and productivity and enhance service delivery, the rate of progress has been lower than might have been expected.

As a result, Hong Kong has been overtaken in the rankings by some of its rivals from the year 2000 research, in particular Norway, New Zealand and the Netherlands.

In 1998 *Digital 21* was unveiled by the Hong Kong Government as the region's information technology strategy.

The intention was to develop integrated government-wide technology infrastructure, with uniform design principles, standard models, common facilities and proper measures to safeguard integrity and security.



At the same time the Information Technology and Broadcasting Bureau (ITBB) was established to lead and co-ordinate the work of all those involved in information technology and related areas.

Proposed new services were to include online submission of tax returns, payment of bills, licensing, registration and job matching.

Based on this research, it is evident that the Government of Hong Kong is thinking big, but like so many countries in both the Steady Achievers and Visionary Followers categories, has yet to fully turn a promising vision into action.

Of the 127 possible services the Hong Kong Government could provide online, 78 are available in some form, giving a Service Maturity Breadth of 61.42%. This is just under the overall country average of 66.94% and well below stronger players in the Asia-Pacific Rim such as Singapore and Australia.

A catalyst for Delivery Maturity will be the development of portals oriented around the needs of citizens. Already different levels of government can be accessed via a single entry gateway, www.info.gov.hk. This relatively simple site has helped Hong Kong score an above average result in the Delivery Maturity score, which measures a government's ability to serve its customers through one-stop single points of access.

With a mature vision, a competitive and supportive business environment and a concerted policy drive from government, Hong Kong is well placed to accelerate its position in the eGovernment Leadership rankings.



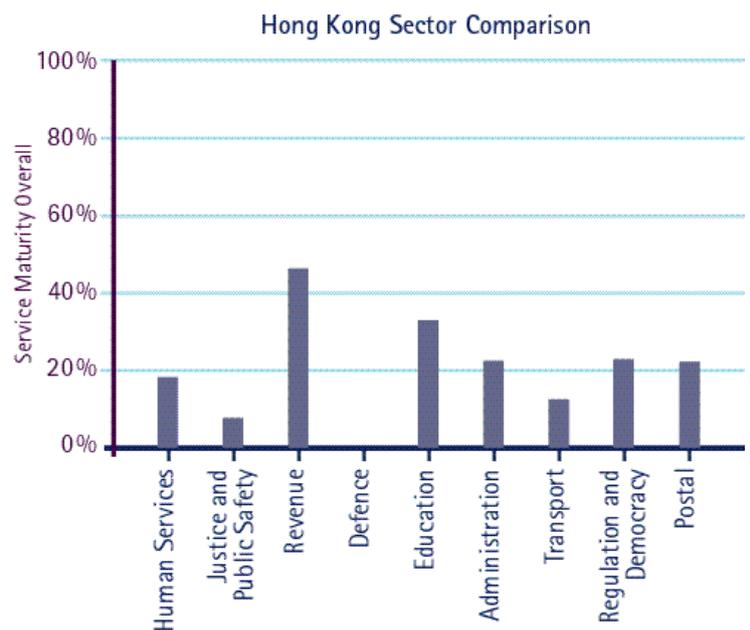
Hong Kong Government sites offer businesses and citizens a taste of what is possible online

Hong Kong's Service Maturity Depth, indicating the level of service provided online, sits at 30.34%, just below the country average of 31.00%. Fifty of the 78 services are at the Publish level, 18 are implemented at Interact level and 10 are offered at Transact level.

To move up the rankings, Hong Kong needs to extend its Publish services along the maturity curve, increasing the ability for citizens and businesses to Interact and Transact more widely with government online.

The most mature services are in the Revenue sector, which is significantly above the sector average with a ranking of 45.63%. The Hong Kong Revenue Department is close to fulfilling online taxation payments for corporations and citizens. The decision to pursue leadership in this area first is consistent with all of the top 10 countries.

Overall, Hong Kong Government sites offer businesses and citizens a taste of what is possible online, but there are only limited examples of requests being fulfilled at any other level than completing a form.



Insufficient services measured in Defence sector

Ireland_

Overall Maturity Steady Achievers

Rank 13th

Service Maturity Very Low

Delivery Maturity Low

Strengths

The Irish Revenue suite of sites has the potential to lead other agencies toward full online operability.

Opportunities

Substantial potential to develop a greater online presence and interactivity across all agencies.

Site to visit

Revenue On-Line, www.ros.ie, a service of The Irish Revenue, is a leading edge site with high user connectivity for the online payment of taxes and viewing tax information.

Ireland is the largest exporter of software in the world and is rightly touted as being an aspiring world leader in the eEconomy.

Despite a disappointing showing in the 2000 edition of this research, Ireland has made good progress over the past few months and has moved into the Steady Achiever category. Though it still has a distance to travel, if Ireland continues to develop its online presence at the rate shown over the past year, then its aspirations to be a world leader within the eGovernment space may be achievable.

While Ireland has achieved its status as a leader in the information technology sector, the primary concentration of effort by the Irish Government has, hitherto, been as an enabler of eCommerce for the private sector rather than as a provider of its own eGovernment services.

The strategy has undoubtedly proved fruitful as Ireland has been a major beneficiary of the eEconomy, has one of the best legislative frameworks in the world for provision of eCommerce, and has also set itself tangible targets and timeframes for providing eGovernment services. The programme involves having "all but the most complex" services online by the end of 2001.



If Ireland continues to develop its online presence at the rate shown over the past year, then its aspirations to be a world leader within the eGovernment space may be achievable

Ireland has moved forward over the past year but, even so, the eGovernment Leadership research suggests Ireland is going to have to continue to build on this progress if the 2001 target is to be achieved. If the Government embraces its role as a provider of eGovernment services as wholeheartedly as it does its role as an enabler of eCommerce, and there is evidence to suggest that it is doing so, then the target is by no means impossible.

Ireland's Service Maturity Breadth, a measure of the number of services for which the national government is responsible, was 59.84%, below the global average of 66.94%. Similarly, the Service Maturity Depth, a measure of the degree of completeness that those online services have reached, was 21.66%, again below the global average of 31.00%.

In the new element of the research, Delivery Maturity, Ireland scored above the 29.39% average with a rating of 33.33%. This is largely due to the development of a cogent and easily navigated Central Government homepage and the beginnings of citizen focused websites, which are, to a fair degree, designed around citizen's needs rather than agency structures.

In Ireland, the Revenue Commissioner's site is the first example of a leading edge eGovernment facility. The introduction of Revenue On-Line in late 2000 now provides an efficient and secure online system for tax payments and, amongst other services, access to tax information 24 hours a day. Revenue On-Line has not only revolutionised the Irish tax system, it has seen Ireland jump in ranking to third in this sector narrowly behind Spain and Canada, both of which have recently instituted state-of-the-art online tax systems.

Few of the other eight sectors covered in the research have yet developed any significant online maturity, although there are signs of development towards achieving transactional ability within some sectors, and several government departments have recently initiated programmes which should address this issue.

In particular, in the Education sector a student can now apply for entry to university online, a service which if replicated in other core tertiary education functions will see this sector create a solid online presence.

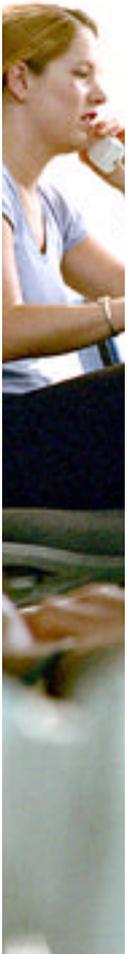
Online payments for utilities can be made through the postal operator, An Post, which has also begun to develop some electronic mail services for users.

An online presence at Publish level has started to emerge through the Department of Social Community & Family Affairs www.dscfa.ie, while some citizenship and passport related services have also started to slowly develop in online maturity.

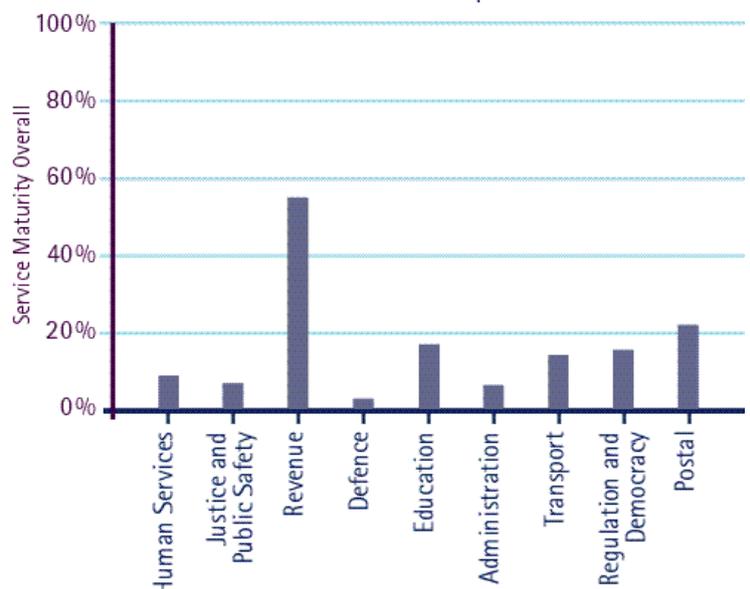
There are numerous projects underway in several government departments such as Social Community & Family Affairs, the General Registrars Office and Agriculture Food & Rural Development, that suggest Ireland is continuing to build on the undoubted progress made in the past year. These projects seem to be developing almost in parallel, which makes integration and communication across departments vitally important.

A level of co-operation will be required to ensure that the government develops an online presence, which is easily navigable and exhibits sophisticated delivery techniques rather than a set of stand-alone solutions, which are difficult to use and focus on departmental structures rather than user needs. The Government seems to recognise this need for cross agency co-operation, and has charged the REACH agency with helping bring this about.

Ireland was one of the biggest movers this year in terms of overall ranking. The initiatives currently in place could well lead to future advances particularly if the Government builds on the success of Revenue On-Line, and provides further customer-focused service delivery. If this 'best of breed' model is used as the benchmark by other government agencies, there should be few barriers to Ireland's progress.



Irish Sector Comparison



Overall Maturity Platform Builders

Rank 21st

Service Maturity Very Low

Delivery Maturity Marginal

Strengths

Good progress in Transportation and Postal sectors.

Opportunities

Articulation of a cohesive eGovernment policy.

Site to visit

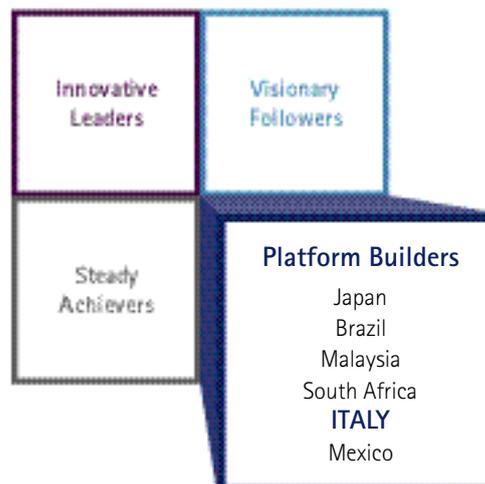
www.poste.it Poste Italiane site is informative and comprehensive.

Italy_

Italy has lost ground in the latest rankings due to other countries' more aggressive eGovernment implementation timetables. However, increasing attention on the efficiency of government agencies and the opportunities for significant cost savings should elevate the importance of eGovernment in the near future.

Moving more government services online would reduce the cost of service delivery. At the same time, an online presence could help to address chronic problems of tax evasion and public safety through better capture and storage of information. eGovernment leaders are, for example, making information instantly available to their police forces online, and creating online business taxation portals.

Service Maturity Overall, which measures the quantum of services online, together with their sophistication, was the lowest of the 22 countries at 3.12%. The Italian Government currently offers less than 30% of the services surveyed online, and those services that are online are concentrated at the lowest level of maturity, focused on publishing information as opposed to providing interactive or transaction services.



The real opportunity for Italy is in developing a comprehensive eGovernment policy, with a clear implementation plan and accountability

Delivery Maturity, the measure of the extent to which governments are adopting best commercial practices in their online presence, was however, at 33.33%, above the average of 29.39%. Italy's score indicates that users can link to any government site via a Central Government site or a small number of government sites.

This approach augurs well for Italy's future performance in this leadership research. In common with many Platform Builders, Italy has been relatively slow to develop due to issues such as equity of access, infrastructure, and skills development, but has successfully put services online in a few priority areas.

Transport and Postal are two areas where some inroads have been made. For example, citizens can go online to purchase train tickets and view train schedules at www.fs-on-line.com.

This example of online transactions is one that other agencies would do well to follow. In the overall Transport category, which includes services such as online vehicle registration and licence renewal, Italy was ranked 16th, ahead of Belgium, Germany, and the United Kingdom.

In Postal, Italy has made strong progress. The popularity of the postal system for payment of utility and telephone bills has been the impetus for creating an online payment capacity, as well as providing citizens and businesses with information on postal services and on the status of a specific mail or parcel delivery at www.poste.it. Italy shares this development with a number of its European neighbours. Germany, Netherlands, Norway, and Finland all have similar eGovernment facilities in their postal network.

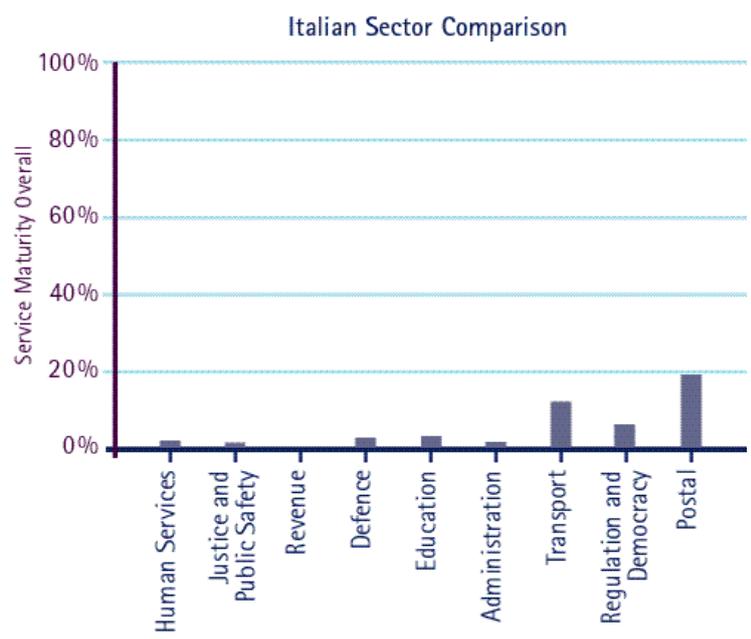
These examples illustrate that eGovernment is possible and can have a significant impact on service delivery. The optimum approach to eGovernment is to think big, articulating a Whole of Government vision, but to start small to demonstrate results. Both Poste Italiane and Ferrovie dello Stato have achieved this with their online presence. They now need to continue to build on this momentum and bring progressively more services online.

Other than in these two areas, Italy has made marginal progress in moving national government services online, and lags the entire European Union, with the next closest country, Belgium, coming in 16th place, and Norway, Finland, the Netherlands and the United Kingdom in the top 10 countries.

The real opportunity for Italy is in developing a comprehensive eGovernment policy, with a clear implementation plan and accountability. The eGovernment leaders have all articulated a vision for a connected government, and then moved to implement that vision in manageable stages.

Selecting a few areas on which to focus, and producing measurable, demonstrable results quickly is the means of garnering broad support for the eGovernment agenda. Given Italy's unique electoral system and coalition driven approach, the Government will need to take these steps to ensure coalition partners are in favour of this policy. Demonstrating benefits to citizens in terms of reduced government costs and improved service will secure electoral support for these initiatives.

From such a low base with a few success stories and strong electoral impetus for more efficient government, Italy is in a strong position to move up in the rankings. The platform for eGovernment needs to be completed in the creation of a policy, and then implementation can begin in earnest.



Insufficient services measured in Revenue sector

| | |
|--------------------------|------------------|
| Overall Maturity | Platform Builder |
| Rank | 17th |
| Service Maturity | Low |
| Delivery Maturity | Very Low |

Strengths

Recent eGovernment initiatives laying the foundation for further reform.

Opportunities

High number of services implemented at the Publish level – these need to be developed to full functionality through integrated cross-agency programmes.

Site to visit

www.mpt.go.jp is the Ministry of Posts & Telecommunications site, which has attained some Transact level attributes.

Japan_

Japan has lost ground since the year 2000 in eGovernment Leadership research as a result of other countries moving more quickly on the implementation of online service delivery. Japan now sits at the top of the Platform Builders group, and has the potential to progress into the Steady Achievers category as a result of a number of soon to be launched programmes.

The Japanese Government launched its *Basic Guidelines for the Promotion of an Advanced Information and Telecommunications Society* in 1999, which promotes the concept of developing e-Japan initiatives in both the public and private sectors. Much of the burden will fall on the private sector, although the Government has committed itself to establishing the appropriate commercial environment. The plan has an ambitious target of making Japan the world's most advanced information technology nation within five years.

In the 2001 eGovernment Leadership research, Japan's Service Maturity Overall was low at 16.18%, compared to the 22 country average of 22.38%. Service Maturity Breadth, at 85.06%, was fourth (behind the United States, Singapore and the Netherlands), indicating a concerted effort on the part of the Government to create broad representation of government agencies online.



Unlike many other countries that have published a vision and stalled on implementation, Japan has included a clear timetable of activities

Service Maturity Depth, the measure of the sophistication of online services, was considerably lower at 19.02% against a global average of 31.00%.

The Postal service was the highest ranked eGovernment service in Japan. Indeed it was the only Japanese agency that had Transact level services online, as well attaining maximum scores for some Publish services.

In common with many Platform Builders, online government is at this stage concentrated in the publication of information, with minimal progress being made toward offering interactive or transactional services organised around the needs of the citizen. Countries in this category have laid the groundwork for eGovernment and now need to accelerate implementation of more complex capabilities.

Japan's Delivery Maturity at 20.00% was below the global average of 29.39%. Delivery Maturity measures the extent to which government online is embracing the best practices in online presence, such as customer relationship management techniques, citizen-focused design, and portals providing a single point of access to multiple agencies. The Japanese Government's online presence has not yet reached this level of sophistication, and across the board this measure has illustrated that government agencies are still stopping at simple information-only web presence that duplicates paper-based information sources.

However, Japan is well positioned to leap-frog other countries in the research. The Government has articulated a vision for eGovernment, and unlike many other countries that have published a vision and stalled on implementation, has included a clear timetable of activities.

The *Millennium Project* was announced in December 1999 and outlined plans for eGovernment and a significant online presence in the Education sector. All administrative procedures, both citizen to government and government to citizen, must be capable of being accessed across the Internet by fiscal year 2003, and by 2005, all schools must have Internet access. The plan also calls for the implementation of 'One Stop Government Shops' which will provide integrated multiple public services.

Japan is also building an infrastructure for authentication, with a pilot system developed and experiments with online projects taking place, with the goal of having the services online by April 2001.

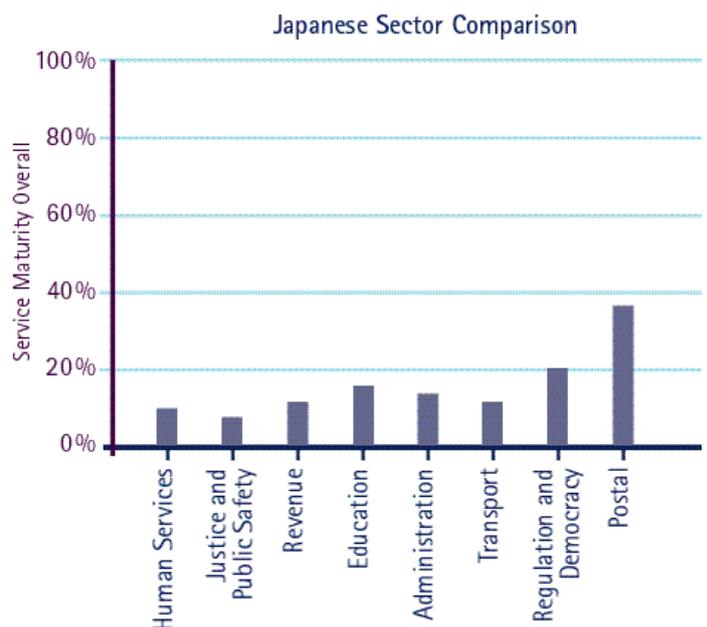
This is indicative of the portal approach that provides a single point of entry to multiple government agencies and which has allowed some countries in the Innovative Leaders groups to progress quickly in this year's research.

An example of the Japanese Government's strategy is eProcurement. Currently there is very little online tendering or purchasing, however the *Millennium Project* calls for a new government procurement system and the release of integrated government procurement information over the Internet in 2002.

The Innovative Leaders in the research have all implemented G2B and G2G eProcurement initiatives, which have often acted as a catalyst for agencies to move their online service delivery beyond simple publishing, to enable complete transactions online.

With over 55 million mobile telephone users and a leading position in mCommerce, the Japanese population is arguably one of the leaders in the take up of new technologies, which augurs well for their interaction with government online.

Japan has the infrastructure in place to move government services into cyberspace. The unknown factor is how quickly government agencies will move to take advantage of this.



| | |
|-------------------|------------------|
| Overall Maturity | Platform Builder |
| Rank | 19th |
| Service Maturity | Very Low |
| Delivery Maturity | Low |

Strengths

Sites designed with the intentions of the citizen in mind and with single access points.

Opportunities

Re-engineering a sophisticated inter-agency platform to create, capture and share knowledge.

Site to visit

The Malaysian Government's homepage mscl.mampu.gov.my provides a single point of access to all major government sites.

Malaysia_

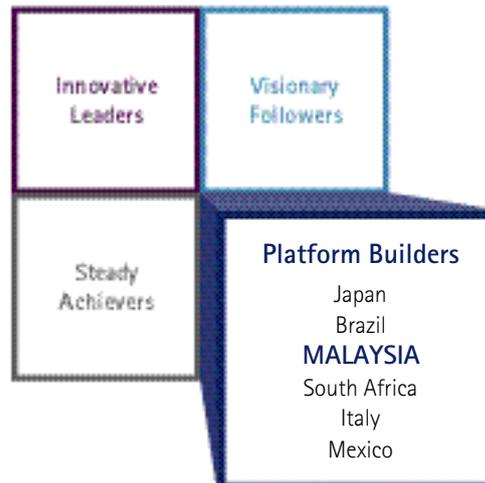
The National Government-led *Multimedia Super Corridor* continues to be the main anchor and reference point for nearly all eGovernment initiatives in Malaysia.

Conceived in the early 1990s, it is one of the main initiatives expected to provide economic growth for Malaysia as the country strives to attain developed nation status, as set out in its *Vision 2020* policy.

eGovernment is one of the seven Flagship Applications introduced to jump-start the *Multimedia Super Corridor*. Thus far there has been a lot of policy activity, yet in common with so many other countries in the Platform Builder category, the next critical step Malaysia must take is to accelerate its implementation.

Of the 126 services in this research that the Malaysian Government could deliver online, 64 are available to some degree, giving a Service Maturity Breadth of 50.79%, below the global average of 66.94%.

In the measure of Service Maturity Depth, 59 services are offered at the Publish level, two at the Interact level and three at the Transact level. These results contribute to Malaysia's Service Maturity Depth score of 22.08%, which is below the country average of 31.00%.



The Malaysian Government, through its Vision 2020 programme, is setting an ambitious agenda

The high percentage of Publish scores shows the Government is committed to getting information online. Nevertheless, the low Service Maturity Breadth score shows significant further opportunity to move towards Interact and Transact capabilities.

This style of development is, however, consistent with many of the countries in the Platform Builder and Steady Achiever groups. Belgium, Japan, Brazil and Portugal have all taken the route of publishing information first to establish an Internet presence before adding the depth and sophistication an online presence offers. Significantly, and in Malaysia's favour, is that the Government has taken the first step in adding that complexity with the establishment of a government homepage which provides citizens access to individual government agencies.

However, there is little evidence yet of true portal characteristics that provide transparent and seamless service fulfilment independent of the agency responsible. Having a co-ordinated approach to development will be a critical issue for Malaysia to address if it is going to swiftly develop a strong eGovernment presence.

Delivery Maturity, the measure of the sophistication of the delivery mechanism for services provided over the Internet, takes into account customer relationship management techniques, single entry points and intentions-based design. On this measure, Malaysia scores 26.67%, just under the global average of 29.39%, but above some of the higher ranked countries in the Asia-Pacific region, including Australia and Japan.

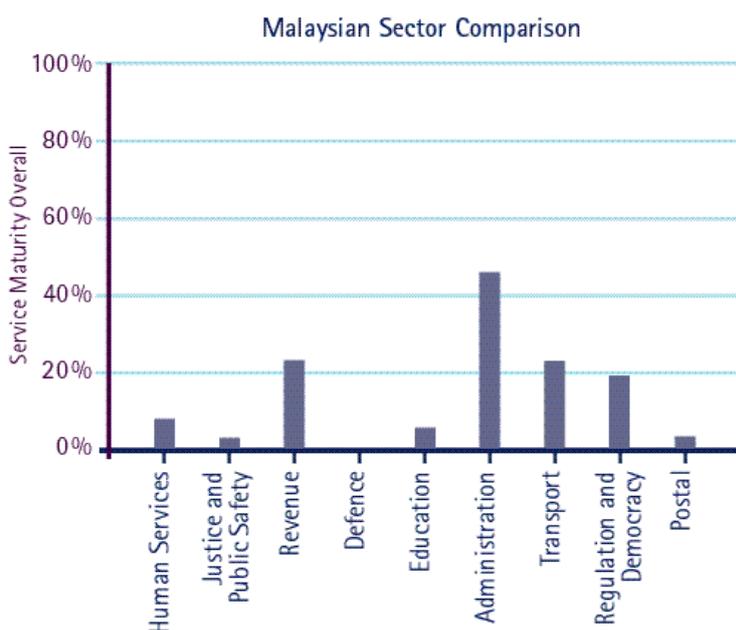
Contributing to the Delivery Maturity score is the Government Internet site in Malaysia designed with the intentions of the citizen in mind and acting as a single access point. The site www.mcsl.mampu.gov.my allows citizens to access information on Federal and State Government agencies and is organised around key sectors including banking and finance, business, education and courses and employment.

When analysing the online activity of individual agencies in Malaysia, the areas of Administration and Transport return above average scores. Current eGovernment capabilities in the Transact category include eProcurement, the sale of statistics and demographic information, and the purchase of legislative documents.

But perhaps the biggest opportunity for the Malaysian Government is in the Revenue sector. Already the Government has developed a strong online presence at Publish level, being at the maximum Publish level for eight of the 10 Revenue metrics for which the Malaysian Government is responsible. Revenue, as we have seen, is one of the most complex and challenging sectors in which to deliver online services, yet in Malaysia, there is little more that can be done in this sector without developing and implementing interactive and transaction-enabled online services. Should this occur successfully, the Revenue sector could also be an important example for other government agencies.

In a country where Internet penetration remains relatively low, the Malaysian Government, through its *Vision 2020* programme, is setting an ambitious agenda. A fundamental next step in the country's ongoing development will be co-ordinated back-end development across agencies. By developing a sophisticated inter-agency platform, the Government will be in a stronger position to create, capture and share knowledge online.

With major eGovernment initiatives in development, including an electronic labour exchange, an online licensing and vehicle services payment and a re-engineered eProcurement platform, Malaysia has the potential to move beyond the Platform Builders ranks.



Insufficient services measured in Defence sector

| | |
|--------------------------|------------------|
| Overall Maturity | Platform Builder |
| Rank | 22nd |
| Service Maturity | Very Low |
| Delivery Maturity | Low |

Strengths

Recognition that eGovernment will be one of the fundamental drivers for government reform.

Opportunities

To deliver the nation's first comprehensive eGovernment agenda.

Site to visit

www.unam.mx facilitates interaction between student and educational institutions.

Mexico_

Mexico has recently undergone the first change in ruling party in 71 years. The new Government has been quick to show its intention of progressing the country's information technology capability through the recent introduction of the *e-Mexico* initiative and the establishment of a new government team to initiate the programme. With this initiative, the new Government has the potential to accelerate the reform platform so important to Mexico's economy.

The country's focus today is on transforming the federal administration to win the war against fraud and to improve efficiency and service quality. eGovernment activities, such as online filing and procurement, will be valuable tools to help the Government overcome some of its early administrative challenges.

With a new administration and a relatively 'green field' in the provision of online services, the Mexican Federal Government has the opportunity to adopt a textbook approach by thinking big, starting small and then being prepared to scale fast.

Mexico can take inspiration from many other countries in the research, which have, through the introduction of plans and programmes, moved forward significantly since last year.



Canada, the research leader, is one example, through its high Delivery Maturity ranking, while others such as Brazil and Japan have started their growth by making a concerted effort to improve their Service Maturity Breadth. It is important that initiatives such as *e-Mexico* are the catalysts for co-ordinated development as the country sets about creating its eGovernment environment.

The Federal Government of Mexico has responsibility for delivering 122 of the 165 services measured in this research. Of these 122 services, 44 are delivered to some degree over the Internet, giving a Service Maturity Breadth score of 36.07%. This is below the country average of 66.94%.

Mexico's Service Maturity Depth score, which measures the level of sophistication within the online service, sits at 13.58%, again significantly below the country average of 31.00%. Thirty-six of the 44 services offered online are simply publishing information, five allow for interaction and three enable a transaction to occur over the Internet.

With limited online capabilities and an early trend toward individual agency activity, Mexico has not yet made any inroads into organising services around the intentions of citizens. It is not alone in its struggle to meet this leadership measure. Mexico scores 26.67% on Delivery Maturity, just below the country average of 29.39%. The impending launch of *Precisa*, a homepage with links to all levels of government, is expected to be the first step in developing greater Delivery Maturity.

Mexico's new Government has before it an unprecedented opportunity to shape, drive and deliver the nation's first eGovernment agenda. By learning from the vision and progress of today's eGovernment leaders, Mexico can build a solid platform on which to build new service online offerings organised around the needs of its businesses and citizens.

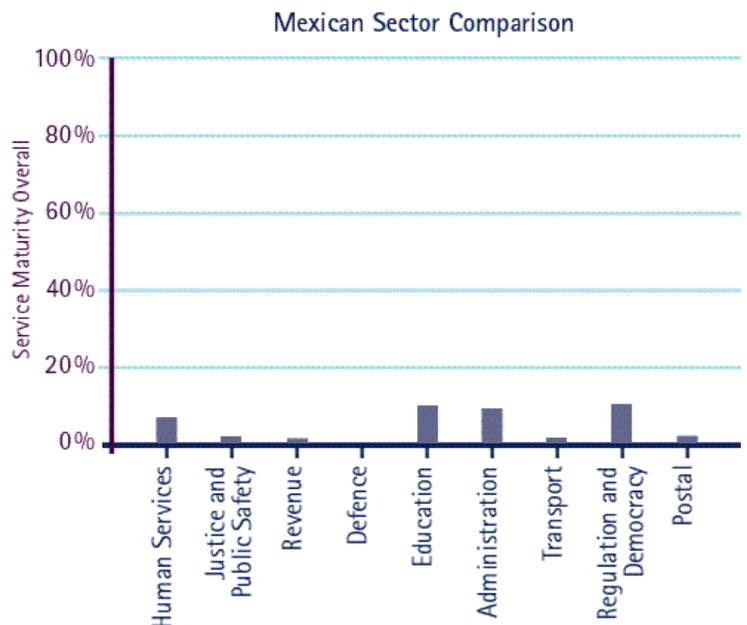
Mexico's new Government has before it an unprecedented opportunity to shape, drive and deliver the nation's first eGovernment agenda

These tentative steps toward online service delivery are most evident in the Human Services, Education, Administration and Regulation & Democracy categories. For example, citizens are able to review occupational and labour market information, and view state educational standards.

Indeed, the Education sector has already developed some sophistication in its delivery, being the only sector in the Mexican research to have services in the Transact category. Students can fulfil key requests online: applying for scholarships and financial aid, enrolling for a course, submitting and receiving transcripts.

Mexico's online revenue capabilities lag behind other sectors, although they have implemented a system which allows citizens to pay their taxes online, however they first need to visit a local office, request permission to use the Internet channel and receive an ID number and an Internet address. While a somewhat circuitous route to an online service, it does show that the technology platform and desire to streamline the tax system is already in place.

As the Mexican Government strives to manage tax collection and authentication in an off-line world, the opportunity exists to use the Internet to help increase compliance and security.



Overall Maturity Visionary Follower

Rank 7th

Service Maturity Marginal

Delivery Maturity Very Low

Strengths

High level of services online and articulated eGovernment plan.

Opportunities

With many services online, the opportunity exists to increase their Delivery Maturity by making access to government services easier and intentions-based.

Site to visit

www.overheid.nl is an information service that serves as a single point of access for all Dutch public sector sites, providing access to all government departments and local authorities.

Netherlands_

The Netherlands has progressed well in the eGovernment Leadership rankings, joining the Visionary Followers group, those countries not yet Innovative Leaders but showing much promise in eGovernment implementation.

The Netherlands' progress has been largely driven by the report *Contract with the Future* (based on the *Electronic Government Action Plan*), published by the Ministry of the Interior in 1999. This report was augmented in June 2000 through the combined efforts of several ministries in the *White Paper, Progress Report on the Netherlands as Digital Delta*. The strategy outlined in the *White Paper* covers key issues such as telecommunications infrastructure, access and skills development, and the regulatory environment.

Service Maturity Overall, at 33.89%, was well above the global average of 22.38%, with 86.59% of the services for which the Central Government was responsible (Service Maturity Breadth) having some online delivery. This is evidence of the efforts of the Dutch Government to maximise the number of services available online to some degree.



The Netherlands has made creditable progress in moving government service delivery online

Critical to this effort, the Ministry of the Interior, www.minbzk.nl is responsible for achieving the target of 25% of all public services being delivered electronically by 2002. The Ministry has ensured there is a structure supporting this programme by the establishment of the *OL2000* initiative, which has taken responsibility for achieving the 25% goal.

Service Maturity Depth, which measures the development toward maximising the potential of online services, was 39.15%, well above the 22 country average of 31.00%.

The Netherlands' overall result was influenced by its Delivery Maturity scope, a measure of the sophistication of its online service. The result of 20.00% indicates there is still considerable scope for improvement in Delivery Maturity. This is true of all countries surveyed as governments begin to learn how to take their online presence from a simple website to a true Internet strategy.

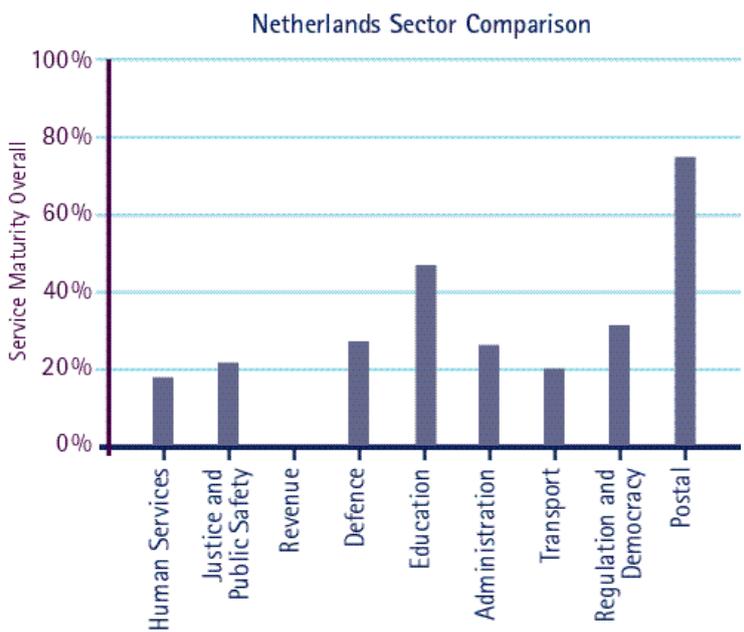
A key component of Delivery Maturity is the provision of a single point of access to government services online. The www.overheid.nl service provides this access for citizens, an easy to navigate site that directs the visitor based upon their intentions, rather than being organised around the government agency.

When viewed from the perspective of government functions, the Netherlands has made progress in all areas researched. In the area of Human Services, encompassing social welfare, employment and labour services, the Netherlands is ranked eighth. Citizens can go online to search for jobs and to search for apprenticeship opportunities at <http://werk.net>.

In Education, the Netherlands is in the leadership group in sixth position, with services such as applying for grants, university applications and course delivery all available online. Education is an area in which the majority of the countries surveyed had their most sophisticated online presence, evidence that in this information age, the development of human capital as a source of competitive advantage is a government priority. There is also a correlation with population size, with the greatest progress being made by the smaller countries in the research (populations less than 20 million), such as Singapore, New Zealand, Netherlands and Norway.

Perhaps surprisingly, the Netherlands has made little progress in the Revenue sector, although in fairness, many of the services being surveyed were the responsibility of different tiers of government. While Revenue is traditionally one of the most difficult areas in which to establish a sophisticated online presence (due to the complexity of tax payment, analysis and collection), countries such as Ireland have used Revenue as the basis of their eGovernment platform.

The Netherlands has made creditable progress in moving government service delivery online. Their challenge now, to meet the target of 25% of services online, is to ensure that agencies strive for greater sophistication in their online presence, moving beyond simple publishing of information to allowing businesses and citizens to conduct virtual business with their government. Together with development of greater Delivery Maturity, through greater emphasis on intentions based design and citizen focus, there is no reason why the Netherlands cannot enjoy significant progress in their eGovernment programme.



Insufficient services measured in Revenue sector

| | |
|-------------------|------------------|
| Overall Maturity | Steady Achievers |
| Rank | 9th |
| Service Maturity | Low |
| Delivery Maturity | Marginal |

Strengths

High number of Transact services indicating strong Service Maturity development in the past 12 months.

Opportunities

Potential for agencies that already have an online presence to increase the number and sophistication of services offered.

Site to visit

Elections New Zealand, www.elections.org.nz is a well organised interactive site with clear information and simple instructions.

New Zealand_

New Zealand's progress over the 12 months can best be described as solid if unspectacular with increased Delivery Maturity, especially in the Adding Value category, contributing to its rating.

However, one disturbing factor is the opening of the gap between New Zealand, at the top of the Steady Achievers group, and the United Kingdom in the Visionary Followers group, which is now 4.31%, a considerable and significant difference in the context of this research.

The paradox for New Zealand is that despite having a high number of Transact services (third highest in the research with 15 after Singapore and Finland) which indicates a growing level of sophistication, only nine of the 65 services offered by the Government achieved their maximum potential.

Even those services that have a maximum potential of Publish tend to have scored at the lower end of the Publish scale, for example, in the Justice & Public Safety and Transport areas. While credit must be given for getting such services online, it must also be recognised that there is still considerable development potential to add utility and convenience for citizens and businesses.



The leading sector for New Zealand, which topped the global ratings, was Education. Despite providing a small number of services in this survey, what this sector did provide, it provided very well, especially in the area of applying online for grants and funding. Defence was another segment which performed well, but again it was an area that has developed an online presence without maximising its potential.

Despite the lower than average Service Maturity Overall, the fact that Central Government and its agencies have identified and started acting on the potential of eGovernment does bode well.

This agency growth has been supplemented in May last year by the announcement of the New Zealand Government's eGovernment policy - *A Vision for New Zealanders*. This policy outlined the rationale, the key development areas and social implications of a concerted drive towards an eGovernment future.

While the ideal of having all government information available on the Internet is laudable, without a clear and defined plan, there is an increasing possibility that any impetus in eGovernment development will be lost.

The other area that needs careful attention is the desire to get information online without maximising its potential. The examples, given earlier, of low level maturity in some sectors can be avoided in the future by careful planning of what is to be put online and how that is to be achieved. New Zealand must be careful that the Internet and other eGovernment outlets do not simply become repositories for information and that the benefits the Internet offers are maximised.

The challenge in the coming year will be for the eGovernment unit to move agencies from analysis to action as a co-ordinated group, as well as looking at new opportunities that can be integrated into the wider eGovernment plan.



One of the cornerstones of the policy drive has been to ensure that the digital divide does not create unwanted social pressures

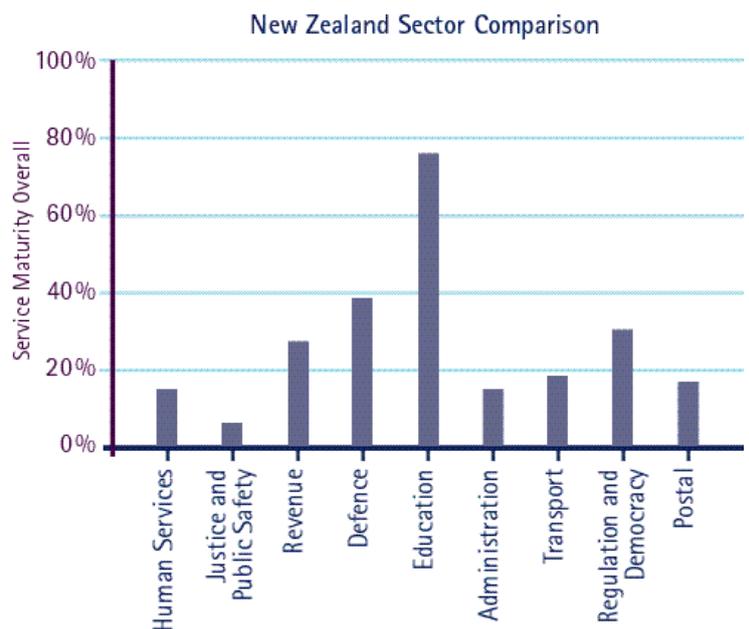
One of the cornerstones of the policy drive has been to ensure that the digital divide does not create unwanted social pressures. This has been encapsulated into the policy by including such initiatives as education programmes and easy public access to online facilities.

Another of the topline initiatives in this policy was the establishment of a dedicated eGovernment unit within the State Services Commission to oversee eGovernment development.

This will complement another key structural body in this policy area, the Chief Executive's Group on Information Management & Technology, formed in 1996 and is responsible for the development of eGovernment strategy and co-ordinating development activity throughout the New Zealand Government. The creation of a central body for eGovernment is an initiative that many countries have recognised as one of the fundamental drivers to co-ordinated eGovernment development.

But like so many other countries, the *Vision for New Zealanders* policy, while well intentioned and structurally sound, misses one crucial element - a timetable.

New Zealand already has the structures within Central Government to effectively deliver eGovernment initiatives, a point that could gain increased credence once a rigorous timetable of development is imposed.



Norway_

Overall Maturity Visionary Follower

Rank 4th

Service Maturity Marginal

Delivery Maturity Low

Strengths

Focus on improving maturity of existing online presence.

Opportunities

Adoption of commercial best practices to increase Delivery Maturity.

Site to visit

www.skatteetaten.no, the Norwegian Revenue Service has developed a high level of transaction services.

Norway has progressed significantly in the government leadership rankings, moving to fourth place and progressing ahead of France, Germany, Hong Kong and New Zealand.

The Norwegian Government has a stated objective to increase the extent to which citizens and businesses can deal with government online, a policy which was first outlined in its *Electronic Government* policy document in January 1999. This policy formed the basis of the *Easier Norway* initiative, now renamed *eNorway*. *eNorway* is a two-year initiative to simplify access to government information and services online and, judging by Norway's performance in this research, Norway is clearly making progress toward achieving this goal.

Service Maturity Depth, at 41.63%, was well above the 22 country average of 31.00%, while Norway's Service Maturity Breadth, at 81.82%, was sixth in the research.

Norway has made significant progress in moving its service delivery up the maturity curve from Publish level to providing Interact and Transact services where possible.



Norway performed well across the board, and was in the top 10 in each of the nine government sectors measured in the research

The *eNorway* initiative has clearly been a catalyst for agencies to have some form of online presence and ensuring that presence is as user friendly as possible. "User-oriented administration" is one of the key electronic government policy goals.

The Service Maturity Overall for Norway was 34.06%, fifth in the survey, well above the global average of 22.38%, and highest of all the European countries surveyed. Norway's focus on maximising transaction capabilities online has been the driver of this result.

But more significantly, Norway was more than 10% lower than the third placed country in this metric, Singapore, showing the large gap in Service Maturity Overall between the Innovative Leaders and Visionary Followers groupings. This amply demonstrates the extent of the task Norway faces if it is to break into the top group of eGovernment leaders.

Delivery Maturity aims to measure the degree to which governments are using commercial best practices, such as intentions-based design, portals and customer relationship management techniques online. Norway scored 26.67% in Delivery Maturity, slightly behind the average score of 29.39%.

Delivery Maturity will be the key driver of future eGovernment leadership. As central governments make more and more services available online, citizens will expect the same user-centric, 24/7 service that they now receive from the private sector, and governments now need to integrate disciplines such as customer relationship management into their online presence.

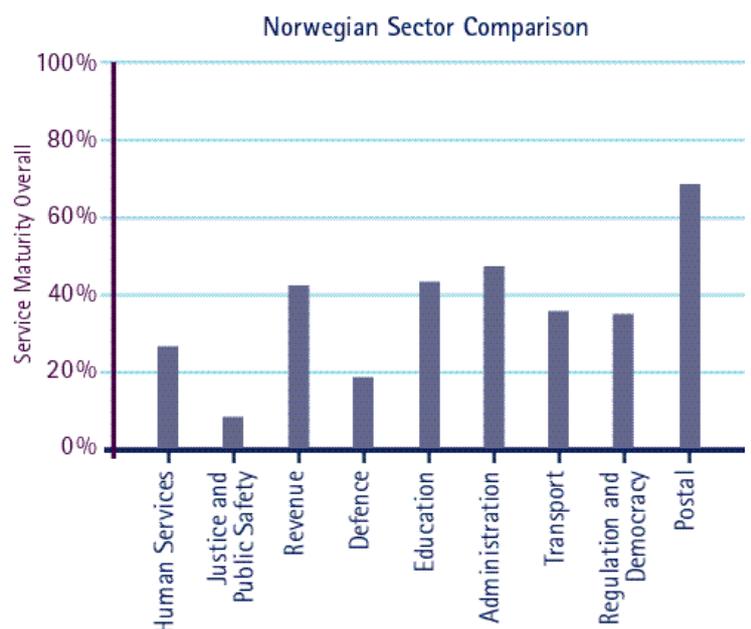
Norway performed well across the board, and was in the top 10 in each of the nine government sectors measured in the research. In Revenue, for example, one of the most complex government services to migrate online, Norway ranked eighth with only Portugal, Spain and Ireland scoring higher in Europe. The Norwegian Revenue Service is a leader in online transactions, allowing Norwegian citizens and businesses to pay income, property and sales taxes online. Very few countries have reached this level of sophistication.

In the Postal industry as well, Norway is among the leaders, allowing users to pay utility bills, find information on postal rates and to purchase postal products online. Norway is behind only the United States, Finland and the Netherlands in its online postal capabilities.

Education has also been a key focus. All countries surveyed had made more progress in education than other areas, evidence of the importance of developing new skills for the eEconomy. Norway was no exception. The Central Government has placed considerable emphasis on building their online presence, and only Finland is ahead in this regard in Europe, the global leader being New Zealand with a well developed system for online application and grant services.

There is a correlation with population size, with the greatest progress in putting education-related services online being made by the smaller countries in the research (populations less than 20 million) such as Singapore, New Zealand, Netherlands and Norway.

Norway's progress since the last round of the research has been impressive. The challenge now is not just maintaining that position but increasing the momentum that has been built as a result of the *eNorway* and other programmes. To elevate the online services of the Central Government to a new level of sophistication, an increase in the Delivery Maturity score will be needed before the next round of research.



Portugal_

Overall Maturity Steady Achievers

Rank 14th

Service Maturity Low

Delivery Maturity Low

Strengths

Progress has been made getting services online at Publish level.

Opportunities

Progress will be enhanced by ensuring co-ordinated development between government agencies.

Site to visit

Ministry of Finance page www.dgci.min-financas.pt is at the forefront of online functionality with its development of electronic tax payments.

Postal operator Correios www.ctt.pt has a well defined, interactive site with good online operability, although English language version is not as complete.

The key to the Portuguese Government developing its eGovernment capabilities will be the success of the *Society of Information 2000-2006* programme which has been given a high priority by the Government and aims to increase usage and access on the Internet by citizens, businesses and the Government.

New to the eGovernment Leadership survey this year, Portugal has attained a position of 14th, firmly in the Steady Achievers group, only 1% away from moving up to 12th position.

It is clear that the Portuguese Government has developed a platform for eGovernment, having established an online presence for 97 of the 151 services it has responsibility for, giving it one of the highest service counts in this research.

Portugal's scoring is consistent with others in the Steady Achievers group such as Germany and Ireland. The three major measures, Service Maturity Depth, Service Maturity Breadth and Delivery Maturity showed solid breadth, little depth and a low Delivery Maturity score, consistent with a policy of getting information online in the short term, possibly at the expense of maximising the potential of those services.



The Revenue sector in Portugal performed extremely well, being one of only seven countries to have 100% Service Maturity Breadth. In this area, there is the potential to make the Service Maturity Depth stronger in the future by increasing the operability of the services already provided online.

The Transport and Administration sectors also showed strong Service Maturity Breadth, with any significant Service Maturity Depth yet to emerge.

It also scored well in the Postal sector, with four services being at the Transact level and two at the maximum Publish level, showing a concerted effort in establishing business and citizen access to a range of postal services.

Perhaps the most notable example of the lack of depth is to be found in Human Services, where there is a good deal of information published online, but little additional functionality.

The Government has also produced guidelines, encapsulated in the *National Initiative for Electronic Commerce*, which address issues such as the legal, financial and technical frameworks that will be required to pursue the progress of the *Society of Information* programme.

There is one critical area in which the Portuguese Government has a lead on many of its rivals. As we have seen throughout the research, many countries have an eGovernment policy or plan, but many of these countries miss the critical ingredient of having a transparent timetable for development.

Portugal's plan is broad and ambitious, but it does have a clear goal and a clear timeframe, a lesson from which many other countries could learn. It will be interesting to see in a year's time how far Portugal has progressed - the platform is certainly in place for considerable growth in the next 12 months.

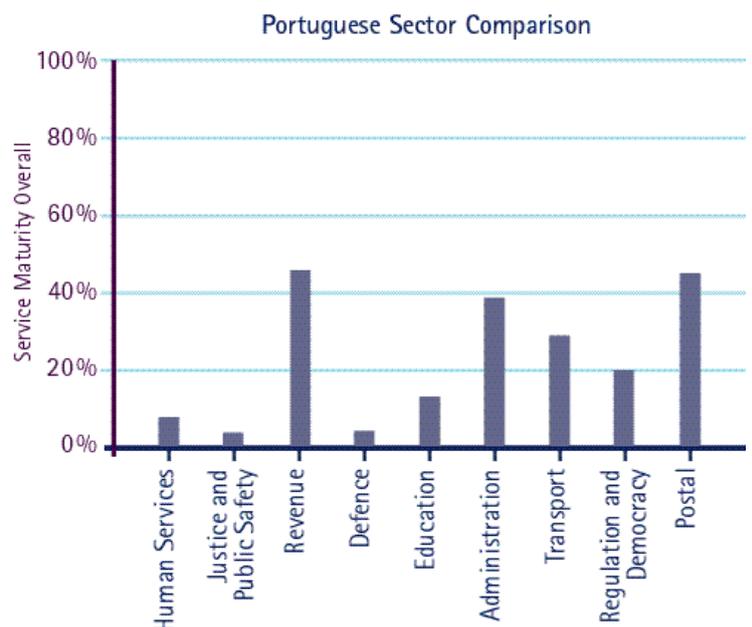


Portugal's plan is broad and ambitious, but it does have a clear goal and a clear timeframe, a lesson many other countries could learn from

Herein lies the three-fold opportunity for the Portuguese Government. First, continue putting services online; secondly, increase the sophistication of those services; and thirdly, create an infrastructure which makes dealing with the Government online simple and convenient.

The Society of Information 2000-2006 programme will be the foundation stone for the future development. Critically, the programme addresses socio-economic issues such as public access to the Internet. The impact of this programme has already been seen in the successful *Digital Week*, hosted in February 2001, which made Internet technology available and accessible to the community through a series of roadshows, introducing eGovernment to the community.

These initiatives stand alongside the more traditional pillars of eGovernment development such as structural change in the public sector, the development of a single point of access for eGovernment services and maximising the potential of new technologies.



Overall Maturity Innovative Leader

Rank 2nd

Service Maturity Moderate

Delivery Maturity Moderate

Strengths

Consistently high growth across all metrics covered in the research.

Opportunities

Recapture the leadership position by capitalising on a strong web presence – develop existing services to their maximum potential.

Site to visit

The Government portal, www.gov.sg, an excellent example of a citizen-centric site.

Singapore_

The development of the eGovernment programme in Singapore revolves around the launch of the five-point plan for eGovernment released in June 2000. The announcement of the policy was backed up by the Government committing S\$1.5 billion to ensure the programme objectives became reality.

The plan centres on the theme of 'Anticipating to be proactive, sensing to be responsive'. It includes driving the implementation of electronic service delivery, using new technologies as they become available and, perhaps most importantly, developing thought leadership in eGovernment. Identifying this as a major issue ensures eGovernment remains at the forefront of policy development and implementation.

Singapore is unique in this eGovernment Leadership research study. As a nation-state, it has the ability to capitalise on the benefits offered by a reasonably small, well informed and wired public. It has stable government and a long-term commitment to ensuring the benefits technology offers are maximised.

Singapore has long been regarded as one of the leaders in the information technology revolution, and this position has been confirmed in the latest eGovernment Leadership research.



Singapore has, however, been supplanted as the number-one ranked country in this research by Canada. The reason is not so much insignificant progress on behalf of Singapore, which showed more than twice the average growth rate, but the fact that Canada grew even more quickly on the back of the successful implementation of its own eGovernment portal.

Singapore led in only one of the nine sectors. Less surprising is the fact that Singapore in almost all sectors scored more than twice the global average. Results were extremely consistent across all government agencies.

The sector in which Singapore attained leadership was Regulation & Democracy, due largely to the development of many services into the Interact and Transact levels, something few other countries achieved in this sector.

Singapore's drive to develop a single portal for all eGovernment services is evidence of the

The other factor in which Singapore has excelled, and which is common to those in the Innovative Leaders group, is the establishment of a high-level structure to drive the eGovernment policy. In Singapore's case this includes the eGovernment Policy Group (made up of four ministry Senior Executives), the InfoComm Development Authority and the *Public Service for the 21st Century* initiative, directed by the Head of the Civil Service. But while the structure is in place and the commitment of government is obvious, there is still considerable room for development. Many services, while having an online presence, have not progressed past the Publish phase of development.

While Singapore continues to impress with its rate of development in the eGovernment field, as well as its obvious commitment to continuing improvement, there is still work to do. If Singapore is to regain the leadership position, it must ensure depth of services are substantially increased and the potential of the Government portal is maximised.



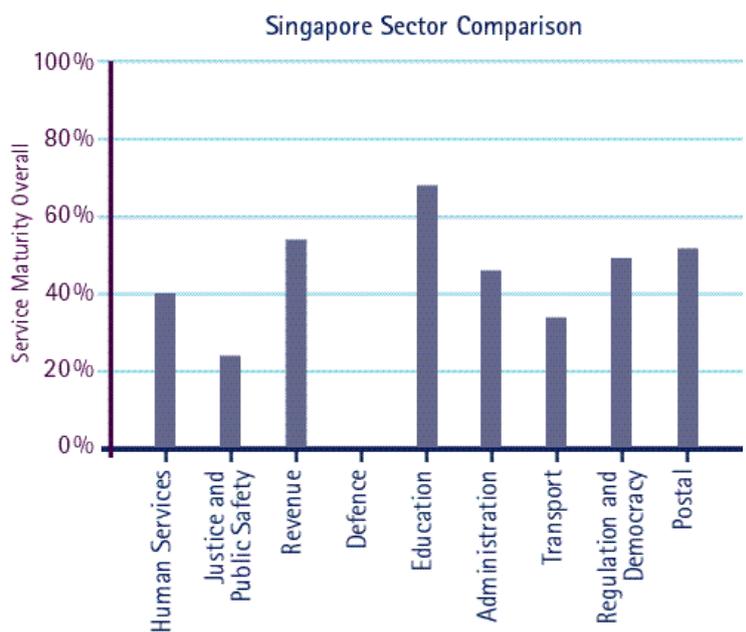
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Government's consistent and broad-based development, essential if its Internet presence is to be of maximum utility to citizens and businesses.

Singapore scored the second highest behind Canada in the Delivery Maturity category. The key features that enabled it to excel in this area were its single point of access and its focus on the needs of the user rather than having websites driven around agency structures.

This is the key to Singapore's continued leadership in eGovernment. The Government portal aims to be as broad based, informative and interactive as possible.

But this is not a new development. For example, for more than three years Singaporeans have been able to pay their taxes online. Within the confines of this research, Singapore was one of seven countries to score 100% in Service Maturity Breadth in the Revenue sector, being fourth in Service Maturity Depth. This is an example of the manner in which Singapore has developed; from a solid platform, the government has steadily grown the number and sophistication of the services it offers.



Insufficient services measured in Defence sector

| | |
|--------------------------|------------------|
| Overall Maturity | Platform Builder |
| Rank | 20th |
| Service Maturity | Very Low |
| Delivery Maturity | Low |

Strengths

Recent appointment of a Government CIO to co-ordinate eGovernment initiatives across multiple agencies and tiers of government.

Opportunities

Implementation of the South African Revenue Service's eFiling Project will lead the way for more online interaction with government agencies.

Site to visit

education.pwv.gov.za, the Department of Education website is well organised for functional and structural information and online transacting.

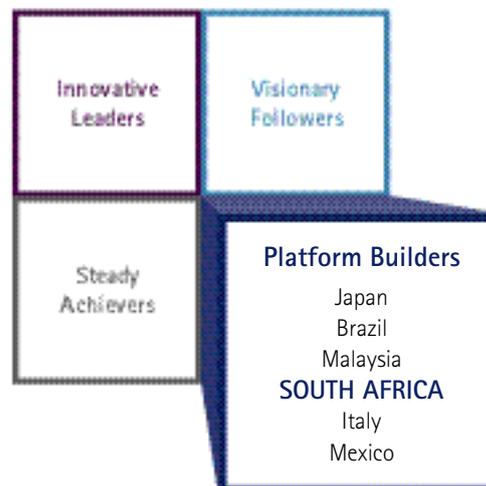
South Africa_

South Africa has lost ground in the nine months since the first round of research as a result of other countries such as Ireland, Malaysia, Brazil and Belgium moving more quickly on implementation of online service delivery. However, there are a plethora of initiatives now under way that should see South Africa gain considerable momentum in eGovernment over the next two years.

Service Maturity Overall was very low at 7.25%, with less than half the national government services surveyed having some online delivery. Service Maturity Depth, which measures the development toward maximising the potential of online services, was 16.56%, little more than half the global average of 31.00%.

In common with other countries in the Platform Builder category, South Africa's national Government has invested in articulating a vision for eGovernment, while addressing key issues such as access, infrastructure, and the creation of private-public sector partnerships to deliver services online.

Access and infrastructure require considerable development to ensure that moves to online service delivery do not create a digital divide.



There are a plethora of initiatives now under way that should see South Africa gain considerable momentum in eGovernment over the next two years

eGovernment initiatives such as the Public Information Terminal, launched by the Department of Communication and the South African Post Office, are experimenting with different delivery points such as public terminals to maximise citizen access to services.

Current online service delivery is focused on the delivery of information, the Publish stage of online maturity, with some agencies moving up the maturity curve to a more sophisticated interactive and transaction capability, organised around the needs of the citizen. For example, the Independent Electoral Commission www.elections.org.za allows citizens to check their status on the electoral roll, and the Department of Social Development allows users to access published information regarding welfare services.

South Africa's Delivery Maturity at 26.67% was marginally below the global average of 29.39%. Delivery Maturity measures the extent to which government online is embracing some of the best practices in online presence, such as customer relationship management techniques, citizen-focused design, and portals providing a single point of access to multiple agencies. South Africa's score reflects its progress in providing a single point of access for citizens to the services provided online by government agencies.

The Revenue Service is an eGovernment leader, with its ambitious project to launch eFiling aimed at overcoming concerns about online security and thus pave the way to accelerate delivery of more government services online in areas such as social security, justice, education and health. The Department of Home Affairs, for example, is examining the possibility of issuing smart cards on a national scale to all eligible citizens.

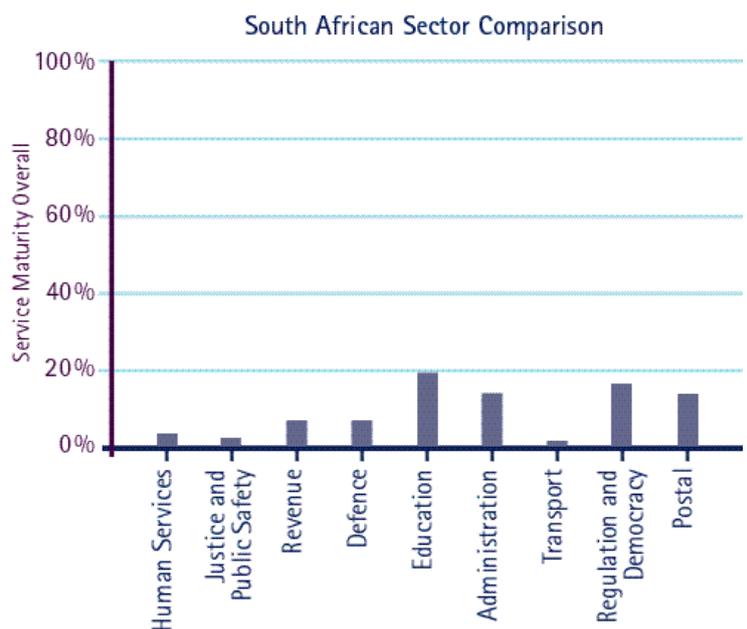
The recent appointment of the Government Chief Information Officer augurs well for future service delivery. There are currently a broad range of eGovernment initiatives underway, but little evidence of co-ordination to improve Delivery Maturity and this new role should ensure that initiatives are leveraged across multiple agencies to maximise value to citizens. In addition, the recently formed Government Information Technology Officers Council will enhance cross agency initiatives and co-operation.

eProcurement is likely to be one of the biggest growth areas in eGovernment. Currently there is very little online tendering or purchasing; however, both the National Treasury and Office of the State Tender board have stated their intention to move

toward online procurement. The Innovative Leaders in the research have all implemented G2B and G2G eProcurement initiatives, which have often acted as a catalyst for agencies to move their online service delivery beyond simple publishing to enabling complete transactions online.

Public-private partnerships will also act as a catalyst for further eGovernment development. There is evidence that government agencies in South Africa are collaborating with the private sector to give greater impetus to eGovernment programmes, and to learn from commercial best practices.

Many of these activities are taking place at the provincial level of government, which was not the subject of this research. Delivery Maturity measures are based upon these practices, which are now beginning to feature in government online service delivery. Countries that successfully embrace these approaches will be the eGovernment leaders of the future. South Africa is making all the right moves to ensure a steady progression in the research rankings.



Overall Maturity Steady Achievers

Rank 12th

Service Maturity Very Low

Delivery Maturity Marginal

Strengths

Ranked first in this research in Revenue.

Opportunities

Leveraging the development in the Revenue area into the industry sectors through co-ordinated cross-agency development.

Site to visit

www.aeat.es Agencia Estatal de Administracion Tributaria (Tax Agency) has extensive Transact functions for both citizens and businesses.

Spain_

Spain's eGovernment initiatives have traditionally been developed along departmental or regional lines. This approach continues today and as a result, Spain shows a pattern of offering services either very well, or not at all.

An online model where individual agencies manage and tender for their own services without a common goal is difficult to sustain, and is a major barrier to Spain's eGovernment progress. This fragmented approach has contributed to Spain dropping out of the Visionary Followers grouping it held in 2000 to a Steady Achiever rating. Over the past 12 months Spain has lost ground to Norway, the United Kingdom, New Zealand and Hong Kong.

In an effort to increase online activity and develop an information society, the Spanish Central Administration has launched *Info XXI*.

This ambitious US\$4.2 billion programme led by the Ministry of Science and Technology, is partially dependent upon private sector funding to turn the plan into reality. Early successes include the introduction of an electronic identity card, eLearning and electronic signatures.



While *Info XXI* has generated a lot of internal activity, it does not equate to a consolidated eGovernment vision and, as borne out by this research, it is not driving online maturity at the rate the Government may have expected.

The Spanish Central Government is responsible for the delivery of 115 of the services measured. Of these, 62 are delivered to some degree over the Internet, giving a Service Maturity Breadth of 53.91%, significantly below the country average of 66.94%, demonstrating the significant number of services the Spanish Government could provide online but does not, in any form.

Similar limitations are found when measuring the depth at which the services are delivered. Spain's Service Maturity Depth is 26.69%, below the overall country average of 31.00%. Forty-six of the services which are implemented are merely at the Publish level, nine allow for online interaction and seven enable transactions to occur across the Internet.

A new component in this year's research, the Delivery Maturity score, measures Spain's current capacity to provide single points of entry and to organise service delivery around customer needs. Spain's Delivery Maturity score is 33.33%, just above the country average of 29.39%.

This Delivery Maturity score could be expected to rise with the impending launch of the Spanish Citizen's Portal. This portal should provide the organisational framework for Spain to accelerate its ability to deliver online services across all agencies. However, without a strong vision and united political will to drive all service delivery online with real interactive and transactional capabilities, Spain will not break the confines of the Steady Achievers category.



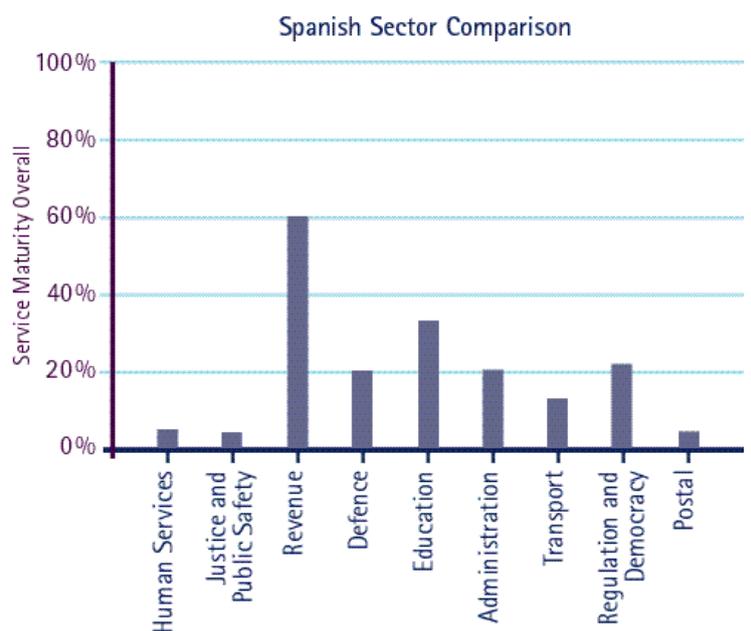
The Spanish Tax Agency services displays by far the most advanced online service capabilities

Five out of the seven transactional services are offered in relation to revenue activities. Corporations can pay income, property and sales tax and citizens can pay income tax online, use digital signatures and track the progress of claims.

The Spanish Tax Agency services displays by far the most advanced online service capabilities and leads not only the agency offerings in Spain, but is the leading revenue organisation in the world in this research. The score for the Spanish Revenue sector was 59.11%, more than double the average Revenue rating of 26.85%.

Outside the Revenue sector, few agencies have come to terms with the full potential of online service delivery. Education and Defence are the only other agencies in Spain to sit above their respective sector average.

These large disparities in online maturity indicate a lack of cohesion and overall direction across the Spanish Central Government. A strong and unified vision, with definite targets and responsibilities is a fundamental feature of each of the eGovernment leaders. It creates an important foundation for the development of portals and introduction of customer relationship management techniques.



Overall Maturity Visionary Follower

Rank 8th

Service Maturity Low

Delivery Maturity Moderate

Strengths

Clear vision recognising the importance of portals and citizen-focused services.

Opportunities

Development beyond simply publishing information online. Systems capable of handling secure two-way transactions that seamlessly cut across the boundaries of local and national government and the public and private sectors.

Site to visit

The www.ukonline.gov.uk is a portal which structures itself around citizen life events, provides an easy access point to a vast variety of information and allows citizens to interact with elected representatives.

United Kingdom_

Prime Minister Blair's vision is for a modern, efficient government which utilises the benefits of the latest developments in eBusiness, and meets the needs of citizens and businesses. This vision is articulated in the *Modernising Government* policy, which aims to make public services accessible online. Included in this drive for online service delivery is the recognition that government portals and links to the private sector are a priority.

This big thinking has the United Kingdom poised to make rapid progress in its eGovernment ranking. However, as the Government has concentrated on putting in place the right organisational structures and partnerships, there has not been the large-scale advancement in country ranking during the past 12 months that might have been expected

The United Kingdom's Service Maturity Overall has risen from the 2000 level of 15.61% to 24.33% in 2001. This movement can largely be attributed to a wider selection of services being available online, not an increase in capabilities on individual sites. As a result, the United Kingdom remains in the Visionary Followers category that is characterised by countries with an articulated vision for eGovernment development which are proceeding cautiously with implementation.



The United Kingdom will be a country to watch closely over the next 12 months

With more than 1,000 government department and agency websites receiving more than 20 million requests per week, the magnitude of the United Kingdom's *Modernising Government* agenda becomes evident.

Despite the challenges, the United Kingdom Government claims it is ahead of schedule in its *Modernising Government* programme and expects to have 75% of services online by 2002. This research confirms the Government is laying a sound foundation for online service delivery.

While there is a considerable volume of information on departmental websites, and increasingly through single entry points, the challenge now is how to move beyond this initial Publish phase. As yet there is little evidence the United Kingdom has come to terms with delivering the interactive and transactional capabilities of mature eGovernment.

Of the services the United Kingdom Government is responsible for delivering at a national level, 73.00% of those tested in this research have an online presence. This Service Maturity Breadth score is higher than the country average of 66.94% but still well below the leaders Canada and Singapore which register in the mid-80% range.

The measure that truly differentiates the Innovative Leaders from the Visionary Followers, and where the United Kingdom particularly suffers, is Service Maturity Depth, which measures the sophistication of the online service.

Fifty-one of the 73 services the United Kingdom Government delivers online are implemented merely at a Publish level, 18 are implemented at an Interact level and only four are implemented at the Transact level.

The telling figure is that only 14 of the 73 services implemented are at the maximum possible level for that particular service. For example, while employment information can be viewed online, there is no facility for organisations to register jobs. The more mature delivery mechanisms required to deliver this have yet to be implemented.

On the new measure of Delivery Maturity the United Kingdom Government returns a score of 40.00%, the third highest in the research. Driving up this score is the United Kingdom Government's commitment and action in the area of the single point of access portal.

The Delivery Maturity score highlights the push by the Government to tackle some of the most complex organisational challenges early in its eGovernment programme. However, the portals

that have been introduced at this early stage still remain focused on publishing information and are primarily an interface back to individual sites. The United Kingdom Government has had a portal for some time, www.open.gov.uk providing a useful gateway to services across government agencies.

The most valuable next step will be to enable one-stop interactive and transactional capabilities that can be replicated across many services. Steps have been taken in this direction with the recent implementation of a citizen portal based around life events, www.ukonline.gov.uk. Although this relatively new site still has few Transact services, the Government's plan is to increase transactional capability by bringing new services online throughout the course of the year.

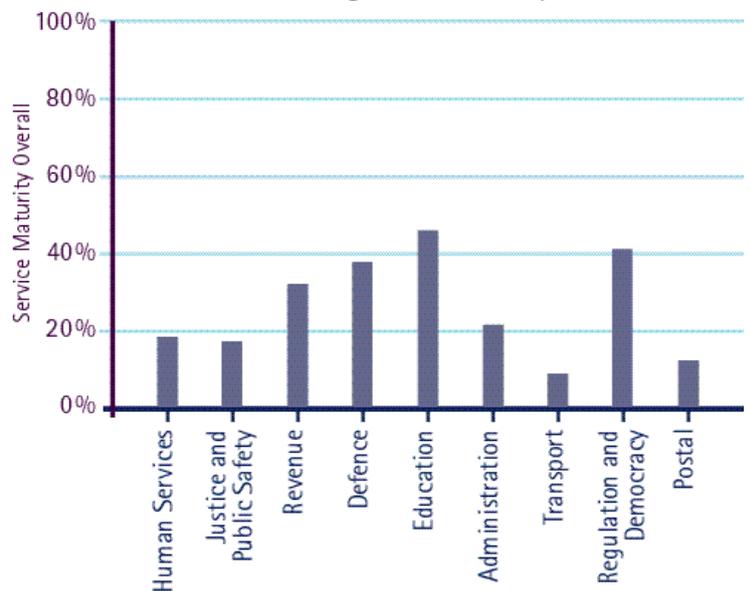
Because the Government has focused on a co-ordinated approach to eGovernment development, no single United Kingdom department stands out as a world leader. Progress has been steady across the board with the majority of agencies achieving above average service scores, notably Revenue and Education. Transport and Postal are the two departments that fall below average due largely to few services being available online.

The United Kingdom will be a country to watch closely over the next 12 months. Now the foundation is in place, the critical issue will be how quickly the Government can introduce transaction capabilities that cut across the boundaries of local and national government and the public and private sectors.

From this platform the United Kingdom has the potential to leap-frog into a leadership position.



United Kingdom Sector Comparison



Overall Maturity Innovative Leader

Rank 3rd

Service Maturity Moderate

Delivery Maturity Very Low

Strengths

Extensive breadth of services online.

Opportunities

Adoption of commercial best practices to increase Delivery Maturity.

Site to visit

The Federal Government portal www.firstgov.gov is a comprehensive intentions-based site for information and links, including for State and Local Governments.

United States_

In the year 2001 eGovernment Leadership research, the United States has maintained its position in the Innovative Leaders group.

The outgoing administration had been a vocal advocate for eGovernment, and made considerable progress in the past eight years. Over 1300 eGovernment initiatives were implemented during this period, including significant progress toward making all government services online by October 2003, in compliance with the Government Paperwork Elimination Act.

The challenge for the new Bush administration will be to build upon this momentum and focus on the high impact opportunities for eGovernment. Already a number of initiatives have been announced, including moving all significant government procurement to the Internet within three years.

Within the research, Service Maturity Depth, at 46.45%, was well above the 22 country average of 31.00% and third highest in the research, indicating that agencies have progressed to the Interact and Transact levels and are striving to maximise the opportunities the Internet offers.



The United States Federal Government and its agencies excelled in Service Maturity Breadth



The United States Federal Government and its agencies excelled in Service Maturity Breadth, being more than 13% ahead of the nearest rival. This result ensured that the United States was the leader in Service Maturity Overall at 46.45%, more than double the country average of 22.38%.

Delivery Maturity aims to measure the degree to which governments are using commercial best practices, such as intentions-based design, portals and customer relationship management techniques, online. The United States Federal Government scored 20.00% on Delivery Maturity, compared to the average score of 29.39%. The focus on building the volume of services and individual agency online sophistication has clearly not allowed time for agencies or the Federal Government to focus on incorporating these techniques.

Delivery Maturity will be the key driver of future eGovernment Leadership, and increasing Delivery Maturity is the major opportunity for the United States in its bid to regain its leadership position.

One notable exception to the low Delivery Maturity development is the establishment of www.firstgov.gov, the Federal Government's web portal created through a partnership between the private sector and Federal, State and Local Governments. An A to Z of Government services, www.firstgov.gov enables users to find government services based upon their intentions, rather than on the agency's needs and structure.

Citizens and businesses already expect the same user-centric, 24/7 service that they now receive from the private sector, and with Internet savvy consumers and businesses, the Federal Government will be under pressure to integrate disciplines such as customer relationship management into their online presence.

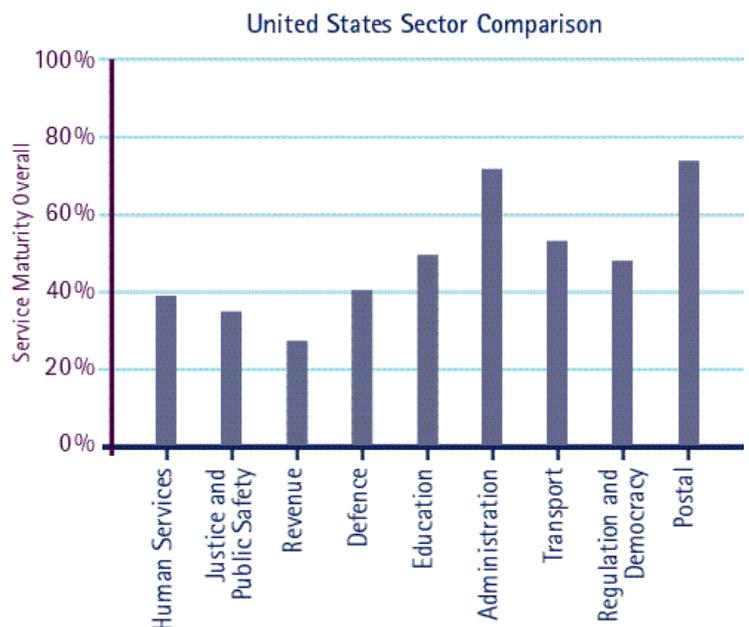
The United States was in the top five countries in each of the industry segments measured in the research with the exception of Revenue, where it was ranked 11th.

The strongest result was in Postal, with the United States ranked first reflecting USPS' global leadership in this field, and its embracing of online technology in a traditionally paper-based industry. Regulation & Democracy ranked second, as did Justice & Public Safety, a citizen rather than business-focused industry, where people now have access to online services ranging from viewing court schedules to filing crime reports.

Revenue represents another opportunity for the United States to regain its leadership mantle. Revenue collection is one of the most complex services to take online, and the countries that have successfully tackled this have performed well with much lower Service Maturity Breadth scores. The leaders, Spain, Singapore and Ireland, have all installed online revenue systems that have both improved tax collections and reduced collection costs.

Education is another area where the United States has lost some ground to more nimble rivals. All countries surveyed had made more progress in Education than any other sector, evidence of the importance of developing new skills for the eEconomy and increasing ease of access to education services, in particular education funding. There is also a correlation with population size and natural resources; the greatest progress in putting education-related services online has been made by the smaller countries in the research (populations less than 20 million) such as Singapore, New Zealand, Netherlands and Norway.

Holding a place in the top three is a creditable result for the United States at a time when other countries have accelerated their eGovernment programmes in order to close the United States' lead. The momentum that had been created over the period of the previous Administration must now be maintained if the United States is to stay in the top five, an achievable result with the right focus on Delivery Maturity, and an improvement in online delivery in Revenue and Education.



Four key themes in eGovernment Leadership_

Reality is catching up with rhetoric

Government online is moving up the maturity curve, but still has a long way to travel

Portals are emerging as the new eGovernment single points of access for citizens and businesses

The eGovernment landscape will be unrecognisable in two to three years time

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eGovernment Leadership

Rhetoric vs Reality – Closing the Gap

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