The Government Executive Series

eGovernment Leadership – Realizing the Vision

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Governments began outlining their visions for online service delivery from some five years ago, and, since that time, have had varying degrees of success in turning those visions into reality. The benefits are clear - faster, cheaper, more personalized and efficient service delivery that citizens and businesses can access 24x7.

Realizing those benefits has, however, proven somewhat elusive. In moving government online, the challenges are complex - legal, administrative, regulatory, social and political forces combine to create a delicate mix of stakeholders that must be managed in the transition to online government.

In this research report, *eGovernment Leadership - Realizing the Vision* we found that governments are, albeit slowly, realizing their visions. More importantly, there is a growing recognition that eGovernment is not just about technology - but about harnessing technology as just one of the tools to transform the way governments operate. Governments are learning that transformation comes not from moving services online, but from redesigning the organization and processes to put the citizen at the center, integrating across agencies to simplify interaction, reduce cost and improve service. Transformation is only possible with the right governance structure, together with the political will to drive change across the whole of government.

In 2002, several interesting patterns are emerging in eGovernment. The distance between the leaders and the followers is widening. There is a late mover advantage emerging however, as a number of countries that were late starters make exponential strides and become serious challengers. Governments that adopt Customer Relationship Management principles early in their eGovernment initiatives are improving at a much faster pace. Portals are becoming far more prevalent, but their true potential continues to be unrealized due to the barriers to cross agency cooperation. There is some evidence that these barriers are starting to be dismantled, as governments, businesses and citizens acknowledge that the benefits of common platforms and information sharing outweigh the perceived costs.

The path to eGovernment is gradually becoming clearer, as early movers learn from their mistakes, as governments begin to appreciate the complexity of the eGovernment landscape and as the collective mindset changes toward citizen-centered service delivery. In this research report, we aim to shed some light on that path.

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Behaving as citizens and businesses, Accenture researchers in each of the 23 selected countries turned to the Internet in an attempt to fulfill service needs that might typically be provided by a national government. They accessed and assessed the websites of national government agencies to determine the quality and maturity of services, and the level at which business can be conducted electronically with government. The research was carried out during a two week period between January 7 and January 18 2002.

Accenture selected 23 governments for the study: Australia, Belgium, Brazil, Canada, Denmark, Finland, France, Germany, Hong Kong, Ireland, Italy, Japan, Malaysia, Mexico, the Netherlands, New Zealand, Norway, Portugal, Singapore, South Africa, Spain, the United Kingdom and the United States. Denmark was the only addition to last year's complement of 22. In total, 169 national government services across nine major service sectors were investigated. The nine service sectors researched were Human Services, Justice & Public Safety, Revenue, Defense, Education, Transport & Motor Vehicles, Regulation & Democracy, Procurement and Postal.

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

No government surveyed offered all 169 services. In most countries, aspects of all of the services are offered at a lower tier of government - examples of which include state, regional, municipal and county. For example, education services in Canada are the responsibility of the provinces and are therefore outside the scope of the study. In such instances, these services were removed before the analysis was undertaken and the government concerned was in no way penalized.

Services were categorized into three levels - Publish, Interact and Transact - reflecting the maximum maturity at which a particular service could be offered. Within each level, services were scored 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 Customer Relationship Management (CRM). These were then combined to calculate each country's Overall Maturity.

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Measurement Criteria

Service Maturity

Service Maturity measures the level to which a government has developed an online presence. It takes into account the number of services for which national governments are responsible that are available online (Service Maturity Breadth), and the level of completeness with which each service is offered (Service Maturity Depth). Service Maturity Overall is the product of Service Maturity Breadth and Service Maturity Depth.

Service Maturity – Definitions

Publish – Passive/Passive Relationship. The user does not communicate electronically with the government agency and the agency does not communicate (other than through what is published on the website) with the user.

Interact – Active/Passive Interaction. The user must be able to communicate electronically with the government agency, but the agency does not necessarily communicate with the user.

Transact – Active/Active Interaction. The user must be able to communicate electronically with the government agency, and the agency must be able to respond electronically to the user.

Customer Relationship Management

The Delivery Maturity Component has been renamed Customer Relationship Management (CRM). This is a measure of the sophistication of service delivery, thereby helping citizens get the best value from their online interaction with government. There are five measures of CRM: Insight, Interaction, Organization Performance, Customer Offerings and Networks.

Insight - Does government remember me? When revisiting a website, does it know I have interacted with government on the website previously, and use that information to offer a more tailored service?

Interaction - Can I access multiple related government sites through the one website? This measures the degree to which services can be accessed through a single site or small number of portals.

Organization Performance - Is this site organized around my needs/Is it intentions-based? This measures the degree to which the services are organized around the citizen, as opposed to around internal government structures.

Customer Offerings - Does this site help or advise me based on my needs or circumstances? This measures the degree to which a website can identify services or can help or advise automatically depending upon the circumstances of the citizen.

Networks - Is it possible for me to access other value-added non-governmental services from this service? This measures the degree to which government services are bundled with other non-governmental services to provide added value to the citizen.

Overall Maturity

A combination of Service Maturity and CRM allowed each country to be allocated a ranking that represented its positioning within the 23 country sample (Overall Maturity). This measure gives a 70 percent weighting for Service Maturity Overall and a 30 percent weighting for CRM. This weighting is reflective of the fact that, at this stage of eGovernment development, the existence and sophistication of service provision is more important than the style of delivery.

Based on 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. Countries in this category achieved an Overall Maturity score that exceeded 50 percent.

Visionary Challengers have a solid base of services online and are generally showing some development in CRM. Countries in this category achieved an Overall Maturity score of between 40 percent and 50 percent.

Emerging Performers generally show a large breadth of services, but at lower levels of maturity and have significant opportunity to grow through maximizing the potential of online services and developing their CRM capabilities. Countries in this category achieved an Overall Maturity score of between 30 percent and 40 percent.

Platform Builders currently have low levels of online service, concentrated at the publish end of the maturity curve, due to a later start on the eGovernment journey and significant infrastructure issues to address in order to implement their eGovernment programs. Countries in this category achieved an Overall Maturity score of less than 30 percent.

Internet Penetration Rates

For each country, Internet penetration rates were calculated using the total number of Internet users per country and the total population of the country. Computer Economics (October 2001) provided all statistics relating to the number of Internet users. CIA Factbook (July 2001) supplied all statistics relating to population figures.

Background Research

In addition to the quantitative element of the research described above, for the 2002 research we gathered information about the eGovernment environment in each of the 23 countries surveyed. Information obtained included the history, content and ownership of each country's eGovernment program, any recent political and legal developments around eGovernment in that country, and details on the processes being used to implement it. We have drawn on this background information throughout the research report.

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In the 12 months since our last report, the landscape has changed dramatically. What has not changed, however, is the adherence of the governments in this survey to the implementation of eGovernment. During that time, governments around the world have continued to pursue their eGovernment visions. Far from withdrawing from these initiatives, they have demonstrated determination to harness the power of the information economy for the benefit of their private and corporate citizens, albeit at vastly different speeds and levels of sophistication.

In this, our third annual survey of eGovernment leadership, we set out to find how governments in 23 countries are realizing their vision for online government. Our objective was to identify the progress these governments have made in the past 12 months in bringing these visions to life, to identify who the new leaders are, to find which countries were making the greatest progress and why, and to highlight the trends emerging in eGovernment.

The leaders remain unchanged. Canada has maintained its position in first place, despite Singapore closing the gap, and continues to advance toward its stated goal of providing Canadians with electronic access to all federal programs and services by 2004. In the *Innovative Leaders* category, Canada and Singapore are joined by the United States - these three countries all recorded Overall Maturity scores of greater than 50 percent. In 2001, the same three countries appeared in this category, and all recorded Overall Maturity in excess of 38 percent, with the highest score being Canada's 50 percent.

Figure 1: Overall Maturity by Country - 2002

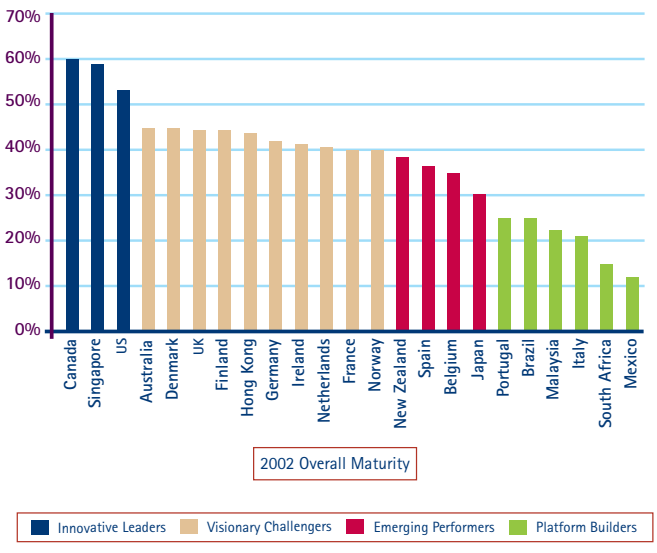

Figure 2: Overall Maturity Change by Country from 2001 to 2002

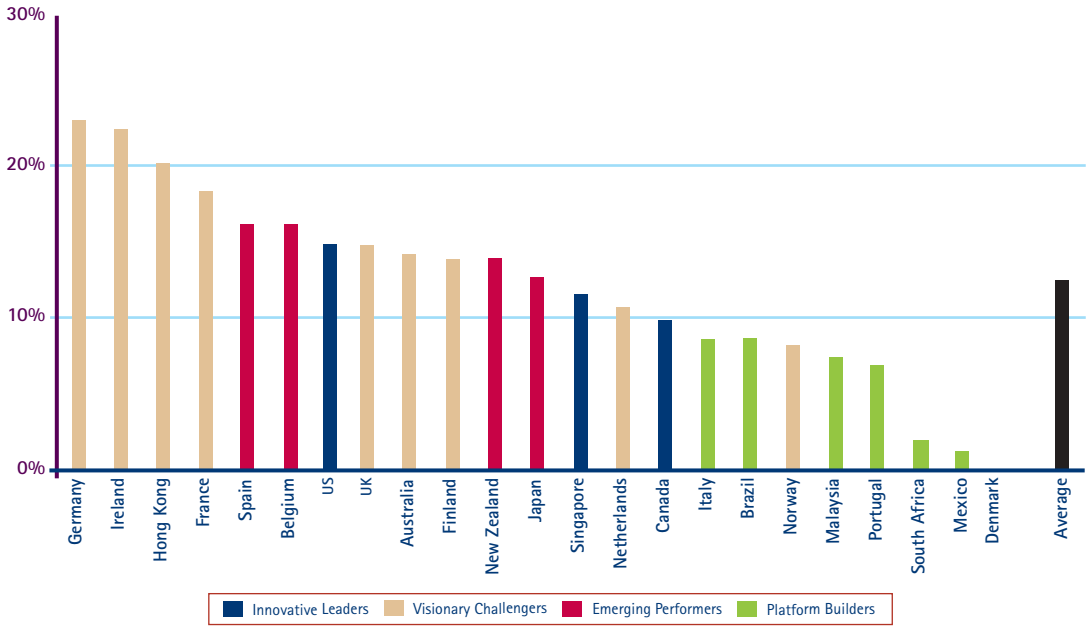

Figure 3: Average Overall Maturity Change by Group

Category	Average Overall Maturity Change
Innovative Leaders	12.5%
Visionary Challengers	16.2%
Emerging Performers	14.2%
Platform Builders	5.8%

In 2001, the second group was named the Visionary Followers and the gap between the bottom of the leaders and top of the followers was 6.3 percent on the Overall Maturity score. In 2002, that gap has increased to 8.9 percent. However, this next group recorded some of the largest increases in Overall Maturity, and these countries have the momentum that could see them challenge the leading trio. For 2002, we have named this group the *Visionary Challengers*, countries with overall eGovernment maturity scores between 40 percent and 50 percent. The Visionary Challengers have made the greatest progress in the past 12 months, with seven of the 10 countries in this category achieving above average growth in Overall Maturity.

There are five new members in the Visionary Challengers: Denmark, debuting at fifth, Germany, Ireland, Hong Kong and France. 55 percent of last year's 22 countries recorded Overall Maturity scores of greater than 40 percent this year, whereas in 2001, only two countries (9 percent) recorded Overall Maturity scores above 40 percent - Canada and Singapore. Among the Visionary Challengers, Germany, Ireland, Hong Kong and France all doubled or came close to doubling their 2001 score, indicating that they are starting to make significant strides in their eGovernment programs.

The third group in our last study was the Steady Achievers, countries making solid if unspectacular progress on their eGovernment journey. In 2002 this group recorded the second highest increase in its average score, and is now labelled the *Emerging Performers*; these countries have maturity scores ranging from 30 percent to 40 percent. This group has shrunk from eight to four countries. All of the Emerging Performers were in the top 10 in terms of percentage change in their Overall Maturity score in 2002. The drivers for this result are mixed; Belgium made strides in CRM, Spain in Service Maturity depth and breadth, Japan in Service Maturity depth and New Zealand on all three measures.

Platform Builders, the countries embarking on their eGovernment programs have also improved upon their maturity performance, by 5.8 percent on average. In the 2001 report, the maturity scores for these countries ranged from 11 percent to 17 percent. In 2002, this increased to between 12 percent and 26 percent. The bar continues to be raised and these countries have demonstrated that while they have a long distance yet to travel on their eGovernment journey, they are making steady progress.

Figure 2 shows the Overall Maturity change by country in the past 12 months, while Figure 3 tabulates the average change by category. Countries in the Visionary Challengers and Emerging Performers groups, with

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Germany and Ireland leading the way, have made the biggest strides. Singapore, an early adopter of eGovernment is below the average, as is Canada. This is not unexpected given their commanding lead in eGovernment and diminishing opportunities to increase Service Maturity.

Figure 4 illustrates that nine of the countries surveyed are approaching 100 percent Service Maturity breadth with over 90 percent of eligible services online to some degree. The next seven countries are between 80 percent and 90 percent and the greatest variation is in the Platform Builders category, with Portugal at just over 80 percent and Mexico at 54 percent. The quantum of services online has however never been the key measure in this research; maturity and sophistication are true indicators of eGovernment leadership, and it is to be expected that over time all services will have some form of online presence.

Figure 5 illustrates that the Platform Builders still have some distance to travel in terms of Service Maturity depth. All the countries surveyed have the potential to further increase the maturity of online services.

Figure 6 shows the role CRM adoption has played in determining the leadership rankings, and also provides a window to potential future leaders. Canada is the clear leader, however Singapore could potentially overtake Canada overall with a greater focus on CRM, as it clearly has scope for improvement on this measure. A real challenge could come from countries such as Ireland, Australia and the United Kingdom - Visionary Challengers with above average CRM scores. New Zealand, in 14th place overall, was in sixth place on CRM - the only Emerging Performer to break into the top 10 and one to watch. The greatest progress in CRM was not confined to any one group, with the United States, Australia and Ireland taking the top three places.

At the highest level, the findings show that the governments surveyed are becoming increasingly sophisticated, both in their articulation of what eGovernment is, and in how best to implement eGovernment initiatives to maximize benefits to citizens, businesses and government alike. Blanket statements exhorting all agencies to "get online" without a blueprint for what this means and how this

Figure 4: Service Maturity Breadth by Country from 2001 to 2002

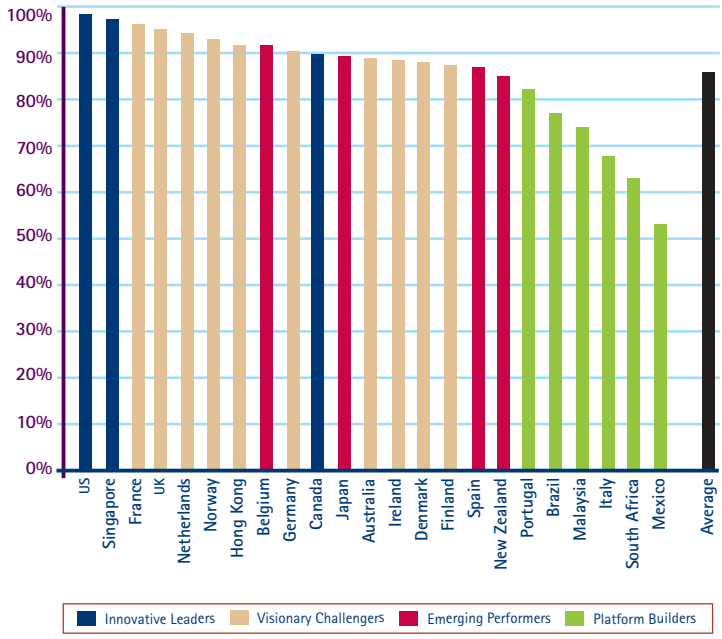


Figure 5: Service Maturity Depth by Country - 2002

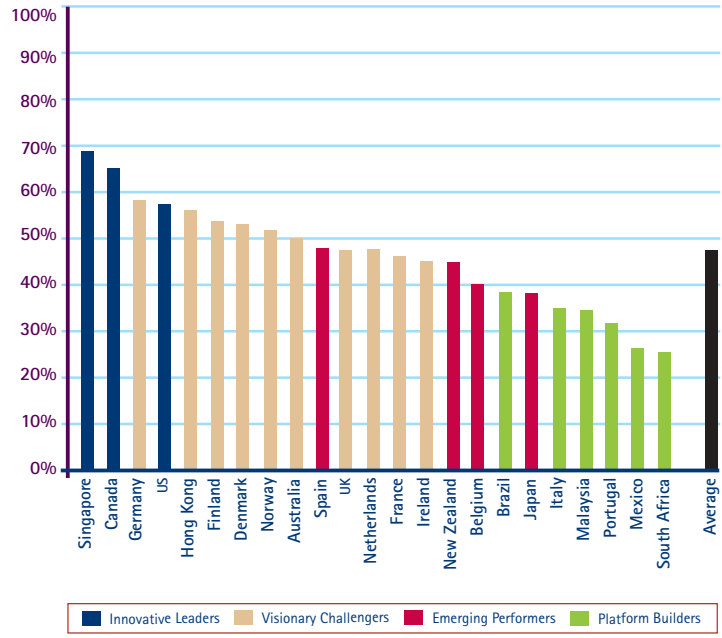
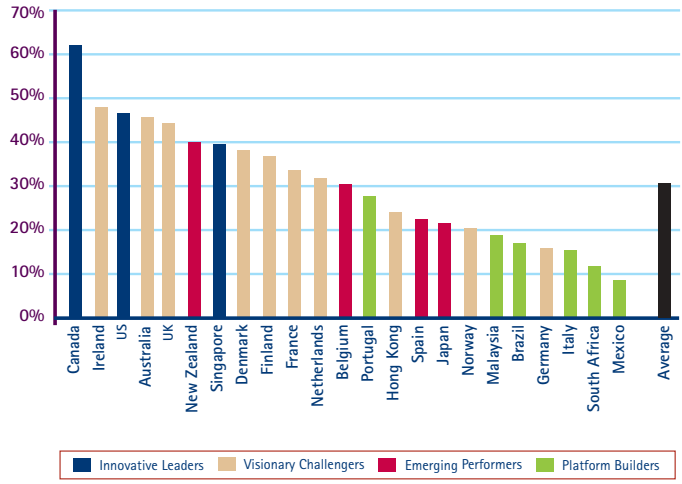


Figure 6: CRM by Country - 2002



can improve both service delivery and administrative effectiveness are disappearing. In their place are detailed action plans that encompass all the requirements of a successful eGovernment program and address stakeholder needs. In the early stages of eGovernment, the gap between rhetoric and reality was a yawning chasm as political leadership articulated an ambitious vision with little consideration of the pragmatic considerations and complexity involved in bringing that vision to life. In these early stages the unintended effect was more rather than less complexity in dealing with government. By 2001, governments in the study were beginning to understand that realizing the potential of eGovernment required much more than agency-based web presence – it demanded a new way of thinking about the relationship between governments and the citizens and businesses they serve. *Section One - Realizing the Vision*, examines in more detail the sea change in how governments are addressing this issue.

In place of imprecise, ambitious vision statements a broader-based approach is taking over, focused on how benefits can be delivered. Most noticeable is the emerging division between the infrastructure aspects of eGovernment, which are being separated from the policy and social issues. And, more importantly, the need for specific measures to foster cross-agency cooperation is receiving growing recognition, with countries introducing new organizational structures and incentives to manage this imperative. *Section Two - Governance Comes of Age* analyzes the various governance structures being introduced.

It is not only vision statements and implementation strategies that have graduated to a new level. The research identified a growing tendency to treat citizens and businesses like customers, and to introduce the techniques of CRM to government service delivery. In our last report, CRM registered as a mere blip on the radar screen. There was little evidence of a customer view driving interactions, with the bulk of government online being a mirror of the offline agency structure. There is now more emphasis on listening to customers, and on designing service delivery models around their needs. We altered our methodology to elevate the importance of CRM to the eGovernment leadership ranking, and the findings illustrate that increasingly, governments are adopting these techniques to deliver services more effectively and enhance the customer experience. *Section Three - Customer Relationship Management - From Citizen to Customer* examines this trend in more detail.

The research examines online service delivery across a range of agencies, and, in this report, we have taken our analysis one step further than in previous years with an attempt to identify leading practices in eGovernment in key areas; Revenue, Postal Agencies (many of which are now partially privatized, and some fully so), Education, Human Services, Justice & Public Safety and Democracy. Our experience has shown that executives in these agencies are keen to benchmark their activities against their peers in other countries. They face similar challenges and can learn from the initiatives of like agencies. *Section Four - Leading Edge Practices* illustrates some of the most innovative and sophisticated eGovernment approaches in the agencies surveyed.

The research also focused on how governments are managing issues of data security and privacy. The concept of unique identification is critical to knowing and understanding your customer. To deliver secure services online, government must have proof of their user's identification. Furthermore, integrating government services depends upon the data sharing between agencies and across government. However, the data government manages is typically personal, confidential or sensitive, or even all three. Governments need to find the balance between unique identification of their customers on one hand and protecting privacy and security on the other.

Clearly, further advances in eGovernment are dependent upon citizens' confidence that expectations for protection of privacy are met. This issue has assumed heightened importance in the wake of the events of September 11, raising questions about the trade-off between data privacy and the extent to which government can enhance its ability to protect its citizens through better collection and management of information. Whereas a loss of privacy is tangible and measurable, there are no guarantees that the promised increase in personal security can be delivered as a result. We also examine a further dimension to this issue; the extent to which governments are embracing smart cards to enhance service delivery.

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Section Five - The Security and Privacy Imperative outlines the initiatives uncovered by the research in this area and the implications for future eGovernment service delivery.

A number of new forces are at work that will transform the eGovernment environment in the next few years. Since our last report we have tracked the emergence of ubiquitous commerce, or uCommerce. uCommerce encompasses new forms of commerce such as wireless, television, voice and silent commerce - the term ubiquitous is used because interactions and transactions will be possible anywhere and at any time, unconstrained by power lines and telephone wires. As this happens, uCommerce emerges as a continuous stream of communication, content and services constantly passing between businesses, employees, customers and the devices that work for them. These new waves of change are expected to have a greater impact in both the public and private sector than "traditional" eCommerce. Not surprisingly, our research found scant evidence of the use of uCommerce in Government. *Section Six - uGovernment: the Next Wave* explores what evidence was found, and outlines potential future applications of uCommerce.

"Vision statements and implementation strategies have graduated to a new level"

The research was undertaken in January 2002 by a team of Accenture professionals in each of the 23 countries selected. We asked these people to behave like citizens and businesses, to go online to do business with government and to assess the maturity of government services based upon a defined set of criteria for each service they identified and evaluated. Our evaluation is quantitative, based upon their success or otherwise in locating the service in question and evaluating its maturity. In this report we have combined that quantitative analysis with further insights into qualitative issues in the eGovernment world to create a picture of eGovernment today, and the key issues affecting the outlook for eGovernment tomorrow.

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eGovernment, as potentially the most significant change to the way governments will deliver services, begins with a vision. The starting point, in the majority of countries surveyed, has been an announcement filled with rhetorical flourish yet light on implementation detail. Therein lies the foundation for the gap between rhetoric and reality, as many governments surveyed initially articulated a vision largely driven by a political agenda, without much appreciation of the very real and very challenging hurdles involved in implementing these broad statements of intent.

Our first report, issued in April 2000, was entitled *Rhetoric vs Reality* to reflect the distance between where governments wanted to be in terms of online service delivery and what they had been able to achieve since their vision statements had been announced. The reality dawning for these countries was the complexity involved in bringing the vision to life; allocating scarce resources, and determining priorities for online service delivery while ensuring disadvantaged groups in society were not left behind by these changes. The first study found that even the leading governments had realized less than 20 percent of the journey in terms of their potential for online service delivery.

At this stage of eGovernment development, these early vision statements often had an unintended adverse effect - driving the rapid development of agency websites limited to publishing information - in order to meet the very broad goal of "being online". Complexity in dealing with government was increased rather than diminished, and putting government online was delivering few benefits to citizens other than an electronic channel for receipt of information.

Governments typically attempted to manage this through creation of a single government website to function as a gateway to the proliferation of agency based sites, which for the most part were organized around the agency rather than around the needs of the customer.

Twelve months later, the 2001 study, *Rhetoric vs Reality - Closing the Gap*, found that reality was catching up with rhetoric, albeit slowly. Modest progress had been made in implementing eGovernment visions, as government executives learned to navigate the issues involved in putting services online. The countries surveyed were moving up the maturity curve but still had a long way to travel. More interactive and transactional capabilities were being delivered online. The most impressive developments in this period were among those countries that were implementing eGovernment with a "Think Big, Start Small, Scale Fast" approach - articulating a vision, identifying an area where results can be demonstrated quickly, and building momentum from this point.

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The 2002 study, *Realizing the Vision*, found that eGovernment programs have made considerable strides in terms of sophistication. The rhetorical flourishes have largely been replaced with pragmatic statements about why eGovernment is critical to economic and social development, with recognition of the barriers to implementation, and clearly articulated strategies. The study found a number of common themes in how visions for eGovernment have matured and how implementation challenges are being managed.

eGovernment is being viewed as just one of the tools that can be applied to meet the many challenges faced by governments

Governments face socio-economic and geo-political forces that will forever change citizen expectations of government - forces including aging populations, increased service expectations, security concerns, a talent crunch (making it increasingly difficult to attract the right people into government), fiscal pressure, forcing governments to find ways to do more with less, and competition - as more services are delivered by the private sector.

In its infancy, eGovernment was often portrayed as the panacea for all the perceived weaknesses in government service delivery. Technology is now being seen as just one of the tools that can contribute to reinventing government for the digital age, and facilitate the development of nimble lean government structures for the future.

In the Netherlands, for example, the government has stated that a new "contract" between the citizen and government is needed to reflect the new relationship between citizens and government in the information society. The contract provides that each citizen must have freedom of choice regarding how he or she is connected to government, that government must be accessible and maximize participation opportunities.

eGovernment must deliver real benefits to the citizen

There are significant costs involved in building an electronic service delivery channel as well as ongoing operating costs that government must cover after they have installed those capabilities. Online government must be more than a duplicate channel for delivering the same services that are available elsewhere, and deliver tangible benefits in terms of operational efficiency and cost savings. Governments are gradually learning how to measure the costs and the impact of eGovernment initiatives.

Online services must be marketed to drive take up

Many eGovernment initiatives have been based upon a "build it and they will come" mentality with little thought to what are the most appropriate services to put online and how to encourage citizens to move to the online channel. Few incentives have been built in to encourage usage. Governments have not incorporated marketing into their eGovernment activities, nor have they targeted specific segments of their user base to encourage them to take advantage of those services. There is evidence now emerging that these skills are being developed and marketing to citizens is assuming increasing importance.

Whole transactions must be completed online to drive cost down

Expectations that eGovernment would fully reduce the cost of service delivery have not been realized due to the immature nature of most online government, and critically, the lack of back office integration. Publishing services online has little impact on cost - in most cases this is just a duplicate channel. Real cost savings are only realized when there is true integration between the web front-end and the back office systems. Achieving this end-to-end integration requires changes to administrative structures, development of new skills, and redesign of processes. Implementing the changes necessary to truly capture the benefits of eGovernment is far more complex than simply creating an Internet presence.

The citizen is at the center of the vision, but other key stakeholders are also considered

Governments are acknowledging that citizens have a right to expect the same level of service from their governments that they receive from the private sector. The modern citizen wants choice, convenience and control over their relationship with government - governments increasingly see this and design with these citizen-driven guiding principles in mind. Canada, for example, has launched an online citizens panel - a virtual focus group to collect feedback and understand expectations for government online. Such feedback from citizens is becoming an increasingly important information source for selecting and evaluating the effectiveness of eGovernment initiatives.

The importance of other stakeholders is gaining currency. eGovernment statements increasingly recognize the impact of electronic government not just on citizens, but also on government employees, on private sector organizations, on government processes and on organizational structures.

Singapore has developed a strategic framework that includes a "GtoE" component - Government to Employees. The government has recognized that to be successful both in service delivery and in policy implementation, there needs to be an emphasis on employees to ensure they perform at their best and meet the challenges of the new economy. Programs for eGovernment must acknowledge that there can be no eGovernment without a coordinated approach to human resources management.

Connected government requires a connected vision

The leaders in eGovernment have outlined visions that are based upon the key principles of organizing according to citizen needs and taking a whole-of-government approach coordinated by strong leadership at the executive level. Canada, the leader for the second year running, outlined its eGovernment vision in 1999, stating that "by 2004, our goal is to be known around the world as the government most connected to its citizens, with Canadians able to access all government information and services online at the time and place of their choosing".

Governments are articulating key priorities for cross-agency eGovernment rather than leaving agencies to determine their own online presence. In the United States, the Office of Management and Budget last year announced 23 key eGovernment initiatives that would be delivered over the next two years, many of which cut across many federal agencies and involve partnerships with state and local governments. These initiatives fall into four categories - government-to-citizen, government-to-business, government-to-government and internal effectiveness and efficiency. Such an initiative is characteristic of governments increasingly realizing that delivering connected government online requires a cross-agency approach.

Outcomes must be clearly defined and progress measured

The key performance indicators that must accompany an eGovernment program are becoming clearer. Open and transparent status reporting, and the usage of and adherence to benchmarks is gaining currency across the board but needs to become further embedded.

The Australian Government has developed a Government Online Survey - www.govonline.gov.au/projects/strategy/GovernmentOnlineSurvey.htm - to report on its progress towards placing government information and services online. All government departments and agencies take part in the survey and provide information against five key measures contained in the Government Online Strategy.

Prior to 2001, the Canadian Government relied on various International Benchmarking initiatives to measure its progress. In late 2001, the Treasury Board of Canada launched a public reporting process, which involves both departmental and government-wide reporting. In addition, the online Citizens' Panel enables the government to collect valuable information to help it to better understand current perceptions and future expectations of government online. Consulting with citizens and businesses is key to Canada's online initiative. The government also undertakes extensive public opinion polling to ensure that the program continues to meet client expectations.

Measurement is also gaining currency in Europe. The Benchmarking Survey sponsored by the European Union (EU) and published for the first time in November 2001 is being used by EU member states to assess their progress relative to other member states. This survey is due to be repeated at regular intervals and will probably change over time to focus more on service sophistication and less on service presence. In the United Kingdom, the benchmarking report, Consultation with Citizens and Government, outlines the various approaches to measuring progress laid out by the e-Envoy. Denmark's Digital Taskforce monitors progress through a variety of processes, including international benchmarking.

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Collaboration with the private sector is a stated goal

There is a growing recognition that the private sector has the capacity to invest and to innovate, and has much to gain from leaner, more efficient government. The participation of private organizations is being actively encouraged in the majority of the countries surveyed.

New Zealand's vision, entitled "government.nz@your.service" states, "strong partnerships with the private sector are essential to the success of the eGovernment program". The eMexico program is focused on three principles - content, connectivity, and services (via portals). The connectivity goals will be achieved through a partnership with private telecommunications companies as the scope and importance of the eGovernment project requires the involvement of all sectors in bringing the program to life.

Collaboration with the private sector is becoming more sophisticated, with government entering into new business arrangements with private sector providers where risk and rewards are shared and where the focus is on delivery of business outcomes. Far removed from the simple outsourcing models of the past, these arrangements are partnerships in every sense of the word, tackling complex projects that go beyond just information technology, and encompass all the activities necessary to provide the business service. In many cases these new transformational outsourcing projects are funded by cost savings or revenue collections generated.

Effective transformational outsourcing requires an enabling environment of good management practice, and some governments - notably the UK, Australia and New Zealand - have worked for the past decade to put these in place. The important components include "big-picture" overarching strategies and goals to guide efforts and measures of success against which to check progress.

Now, more than ever, citizens are looking to their governments for leadership. Government employees are expected to institutionalize management practices that foster good decisions; they are expected to have sound relationships with private sector firms to get the right things done right; and are expected to have the information they need to orchestrate excellence over the long term. The large, traditional, infrastructure-heavy, investment-hungry organization is the past; the lean, virtual business model is the future. Transformational outsourcing is one way to completely change the boundaries and eGovernment programs are increasingly embracing these new business models to drive change in service delivery.

"Rhetorical flourishes have been replaced with pragmatic statements of vision"

governance comes of age_

In previous iterations of this research, we found a strong correlation between overall progress in implementing eGovernment and leadership, political will, commitment to deliverables, and accountability for results. These factors had the greatest influence on progress - as opposed to other social, political or economic factors.

In 2002, new governance patterns are beginning to emerge. Governance is coming of age as political leaders and government executives recognize that eGovernment is not primarily a technology program - it is a change program that has the potential to transform the way government operates. Change programs, to be successful, must be led by pragmatic visionaries who can articulate what needs to happen, who can inspire and motivate, but who also can navigate and manage the issues that the transition to eGovernment involves. Central to these governance structures is a growing recognition that the innovation necessary to transform government is beyond the scope of any single agency. They must harness the best thinking on the future of government regardless of where it resides, and make bold moves to break down barriers to success. In this section we highlight emerging patterns in governance.

Coordinating across multiple tiers of government

In taking a citizen-centric approach, eGovernment must build bridges between agencies in the same tier of government as well as between the different tiers of government. It is in this area that little progress has been made. The majority of governments surveyed recognize that this issue is a significant barrier to progress but few have strategies for managing the issue.

The Italian government has outlined an ambitious vision to develop a service-oriented administration whose offices are effectively structured around the citizen's needs, but is heavily dependent upon local government and the Regioni to bring about this change. Canada's Government OnLine initiative will place increased emphasis on online service delivery partnerships with provinces, territories and municipalities, as well as with businesses, volunteer organizations and international partners.

Australia has made a breakthrough in cross-tier cooperation with the creation of the Business Entry Point. This initiative is part of the federal government's promise to cut red tape and to make it easier for business to comply with government requirements.

governance comes of age_

It does this by providing free online services and information for Australian business via the website - www.business.gov.au - 24x7. The Business Entry Point Transaction Manager allows users to locate, complete and manage online transactions with Commonwealth, State/Territory and local government agencies.

One key aspect of Ireland's eGovernment vision is to establish a Public Services Broker, which will function as a one-stop shop where the public can access and apply for a wide range of services and benefits. In order to make this cross-agency initiative work, the government has established the Reach Agency, a cross-departmental team of civil servants responsible for delivering the infrastructure to make the Public Services Broker a reality.

In France, Prime Minister Lionel Jospin announced in 2001 the creation of a new body to coordinate the introduction of electronic public services - the Agency for Information and Communication Technologies in Administration, charged with integrating eGovernment initiatives and overcoming barriers to government reform. While the research observed a few instances of true cross-agency co-operation, they remain in the minority.

Deconstructing agency silos – creating a single funding point

In the early phases of eGovernment, progress in many countries was hindered by a governance structure that was largely powerless to overcome well-entrenched bureaucratic divisions. While a whole-of-government approach is the key to success, securing cross-agency cooperation proved very difficult.

Information and communications technologies can be instrumental in breaking down these divisions, however executives often perceive this as a threat and make investments that protect and preserve the status quo. This year's research uncovered some evidence that these barriers are now starting to break down. Governments are recognizing the opportunity cost of fragmented systems and processes that duplicate information gathering. In addition, the cost to business of multiple compliance points is a disincentive to investment and one that can be significantly reduced through cross-agency cooperation.

The United States has a stated goal of scrutinizing all federal IT investments to ensure they maximize inter-operability and minimize redundancy. Cross-agency projects are key but current funding practices where appropriations are made on an agency-by-agency basis actively discourage this approach. The United States federal government has proposed overcoming this barrier by creating an eGovernment fund to support inter-agency projects to improve citizen access to federal services. While this was one of the few examples found of a specific funding initiative, it is an approach that should be considered by other countries, all of which face this barrier to varying degrees.

The rise of the chief information officer

eGovernment is about delivering improved service through dramatically improving the way governments manage information. Two of the three Innovative Leaders have appointed Chief Information Officers (CIOs) to manage their eGovernment programs. This may be only a title, but conveys the crucial message that eGovernment at its core is about how the government manages information for the benefit of its citizens. Canada and the United States have recognized that this is the role they need their eGovernment leaders to play. South Africa has also given its eGovernment leader the title of government CIO. The Office of the e-Envoy in the United Kingdom is another example of a title having been created that truly distinguishes the cross-agency eGovernment leadership role from a more traditional agency title.

The rise of the CIO is evidence that governments recognize that a whole-of-government approach, driven by strong leadership and sponsorship, is critical to success.

The value of private sector experience

The United States, United Kingdom and Italy have all selected leaders for their eGovernment initiatives from the private sector. Mark Forman, the newly appointed Director for Information Technology and eGovernment

"The United States, United Kingdom and Italy have all selected leaders for their eGovernment initiatives from the private sector"

in the United States, was most recently Vice President for eBusiness at Unisys Corporation and has also worked in the public sector. Andrew Pinder, the e-Envoy in the United Kingdom, joined recently from Citibank and his career includes 18 years in Inland Revenue. The Minister for Innovation and Technology in the Italian government, Lucio Stanca, has over 30 years experience in the IT sector.

It is significant that both the United States and The United Kingdom are eGovernment leaders with a track record of making the right moves early. Italy has remained a Platform Builder this year, but has recently unveiled an ambitious plan, the benefits of which it expects to reap over the coming years.

customer relationship management - from citizen to customer

A term familiar in business circles, Customer Relationship Management (CRM) is attracting increasing interest in government. Governments realize that it is a tool that has significant potential to improve their relationships with their customers through re-organizing service delivery around customer intentions. CRM allows agencies to create an integrated view of the customer and to use this information to coordinate services across multiple channels.

CRM in government is a relatively new concept and one that has gone largely unexplored. The primary drivers for implementing CRM in the private sector - customer retention and increased profit per customer - are absent in the public sector. However the principles of CRM hold intriguing possibilities for government, given that governments are the largest service providers in the world, provide a wide variety of services and have much to gain from a better understanding of their customers.

As government looks to improve service delivery, while at the same time dealing with the pressure to do more with less, CRM has the potential to alleviate some of the most pressing service challenges governments now face. It can assist in, among other benefits, streamlining government processes, improving inter-agency data sharing and providing self-service options to the public.

In measuring the extent to which governments are applying the techniques of CRM in their online initiatives, our research examined the following:

1. **Insight** - Does government remember me or have an insight into my behavior and needs?
2. **Interaction** - Can I access multiple related government services through this site?
3. **Organization Performance** - Is this site organized around my needs? Is it intentions-based?
4. **Customer Offerings** - Does the site help or advise me based upon my needs or circumstances?
5. **Networks** - Is it possible for me to access other value added non-governmental services from this site?

As Service Maturity Breadth approaches 100 percent and Service Maturity Depth increases as services move up the maturity curve, CRM performance is the test of whether eGovernment is realizing its promise of delivering citizen-centered services. CRM will become an increasingly important component of eGovernment leadership.

Canada has achieved its leadership position largely due to its focus on the citizen in its eGovernment programs.

The President of the Treasury Board, the Honorable Lucienne Robillard, who serves as the champion for the Government Online program, explained the primacy of the citizen as follows: "Too often in the past government services were designed from the inside out; they reflected the structures of government organizations rather than the needs and priorities of citizens. This is changing . . . we cannot stop until all Canadians can have seamless access to all government services quickly, simply and with a minimum of fuss".

Canada scored 61.5 percent on CRM, evidence it has recognized the power of CRM in realizing the eGovernment vision. In the United States, the eGovernment strategy specifically states the need for the government to use the best practices of industry with regard to, inter alia, CRM. The "citizen as customer" idea was first articulated as far back as 1993, in the words of then United States Vice President Al Gore, "we are going to make the federal government customer-friendly. A lot of people don't realize that the federal government has customers. We have customers. The American people."

This approach has been continued under the present US administration, which is focused on creating citizen-centered agencies that work together to consolidate similar functions around the needs of citizens and businesses. Services will be organized around citizen preferences and not agency boundaries. The United States scored 45.2 percent on the CRM measure, 16.2 percent behind Canada and 5.5 percent ahead of Singapore.

While CRM is concerned with much more than just intentions-based design of portals, these represent the first steps that governments are taking on the CRM journey. Intentions-based approaches are becoming the rule, rather than the exception that the research highlighted in 2001. Singapore was one of the early leaders in this area, and its central portal www.gov.sg continues to set the standard.

In Hong Kong, the central government portal www.esd.gov.hk is organized around eight major user intentions during a user lifecycle. France was among the leading countries on CRM measures, and its intentions-based portal www.service-public.fr is well placed to become a leader in the area with a new initiative - mon.service-public.fr - that will provide each French citizen with a personalized portal.

Segmentation is an emerging, albeit limited, practice that is gaining acceptance in government. Just as the citizen as customer is a relatively new concept, customer segmentation, with its connotations of seeking out "high-value" customers, may seem at odds with government's charter to serve all citizens equally. There is evidence however that governments are recognizing that their private and corporate citizens fall into distinct segments and that online services could be tailored accordingly. Yet, segmentation is more complex than simply dividing services between public and private customers. Segmentation is currently very simplistic - limited to broad categories of businesses, citizens and employees. In order to use CRM effectively, a much more granular approach to segmentation is necessary. Delivering better eGovernment services requires that governments tailor services to their customers based upon a broader range of user characteristics. If governments expect citizens to use the Internet as an end-to-end self-service channel then they must provide citizens with a customized service. Over time we can expect segmentation to become more sophisticated as governments increasingly deliver differentiated services based on individual customer group requirements.

The countries surveyed are typically taking one of two possible approaches to segmentation - segmenting visitors within the one portal, or moving toward more specialized portals designed around the needs of target groups, or around themes.

Spain's central government portal segments users into three groups - citizens, enterprises and public employees and provides access to services accordingly. Norway, through www.norge.no segments users into two groups - government officials and citizens.

Segmentation is also central to Ireland's eGovernment vision, where the Irish Government portal, www.irlgov.ie is organized around two segments - OASIS for individuals, and BASIS for business users.

Overall, the use of CRM techniques in eGovernment is still in its infancy, but many governments are recognizing that CRM is a powerful tool for enhancing their online presence. Government agencies have a long way to go to turn the potential of CRM into a reality. The barriers to implementing CRM are the same barriers that have hindered the progress of eGovernment programs. The challenges lie in making a business case for investment, securing leadership support, and in overcoming the obstacles inherent in traditional agency structures where information resides in data silos. A strategy for CRM should be an integral part of an eGovernment strategy, because implementing eGovernment increases the number of channels for service delivery, and therefore creates greater complexity in customer interaction. Before eGovernment, citizens had very limited choice in where and how they could interact with government. With eGovernment they have in many cases an array of channels. CRM is essential to maximizing the efficiency and effectiveness of eGovernment.

leading edge practices_

In previous eGovernment Leadership reports, our focus has been primarily on country comparisons. Feedback on these reports highlighted that government executives were equally interested in comparisons between similar agencies. In this year's report, we have taken our analysis one step further with an attempt to identify leading eGovernment practices in key areas; Human Services, Revenue, Postal, Education, Justice & Public Safety and Democracy. Executives in these agencies have expressed an interest in benchmarking their activities against their peers in other countries. They face similar challenges and can learn from the initiatives of similar agencies.

Human Services

Human Services agencies are responsible for ensuring the social welfare of citizens. These agencies generally segment their customers into four groups: retired (pensioners); older aged and retired; families; and unemployed citizens. Their primary services are geared towards providing support, advice, benefits and payments to these segments. In the current environment of economic uncertainty and a rise in unemployment levels, there is a renewed focus on these agencies.

Human Services agencies are being judged by private-sector standards. Citizens and businesses want comparable quality, availability and accuracy of service that they receive from private sector providers. Agencies are being asked to deliver more services with a higher degree of automation, resulting in fewer errors at a lower cost to citizens and businesses.

They are the most likely agencies to take advantage of the promise of CRM in government. They already have much of the infrastructure in place to realize the full potential of CRM, are already collecting relevant customer data and can tap into that data in order to make customer service improvements. They are also willing to invest in capabilities closely aligned to their strategic objectives.

This year's survey highlighted a leading group of six countries that stood out from the others on the basis of online service delivery - led by the United States, Singapore and Canada, they also included Australia, Ireland, Norway and Singapore. Figure 7 shows overall maturity by country. All scored well in excess of the sector average of 34 percent. The next group of five countries - Germany, Denmark, Finland, Hong Kong, and Norway - scored in and around the Human Services average. The final cluster of countries all scored below the 34 percent average. The Innovative Leaders and Visionary Challengers are clearly ahead at this point.

When we examine year on year change in the Human Services sector and group the countries by their rate of change, a somewhat different pattern emerges, as shown in Figure 8. Ireland rose by a substantial 41.6 percent to claim its place in the leading group, while the United States also jumped significantly - by 34.1 percent. Australia, Canada, Germany, New Zealand, Norway and Spain each jumped by between 23 percent and 30 percent since the 2001 research. Not only are the Innovative Leaders and Visionary Challengers leading in absolute terms, but they also recorded higher rises over the last year than the Emerging Performers and Platform Builders. This is consistent with performance on overall scores, with the gap widening between the leading and lagging countries.

The leading Human Services sites identified in the research are primarily focused on employment. Some of the leading examples of online employment services are described below.

America's Job Bank - www.ajb.org - allows the user to create a resume in the system through a resume-builder feature and to submit it online. It constitutes a complete online process from start to finish. The Job Bank contains an occupation search capability. The jobseeker can further refine a search using several advanced search criteria such as the location in which the jobseeker is available, required education, resumes entered within a specific time period, and salary range. The service also permits keyword searching so that the jobseeker can be even more specific.

Using the jobsearch service provided at www.jobsearch.gov.au, Australian jobseekers can find employment and Australian employers can find staff. Various types of information can be accessed, from information on careers and training to details of labor market conditions, while the WageNet section of the site provides information on wages and conditions throughout Australia. It is possible for registered jobseekers to login and locate information relevant to their particular circumstances and to submit a resume online.

Human Resources Development Canada (HRDC) provides a leading example of another aspect of Human Services. HRDC - www.hrdc.gc.ca - provides Canadian citizens with the ability to register online as unemployed in order to apply for unemployment insurance. In addition, HRDC has piloted a service through which Canadians can apply online for employment insurance benefit. The service is planned to be available throughout Canada from April 2002, and constitutes the first step in what will eventually be a complete range of online services related to employment insurance.

Figure 7: Human Services Overall Maturity by Country - 2002

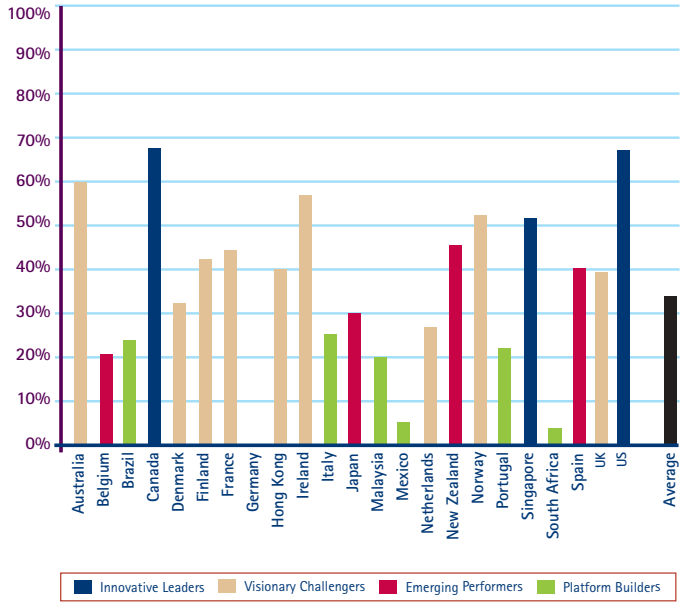
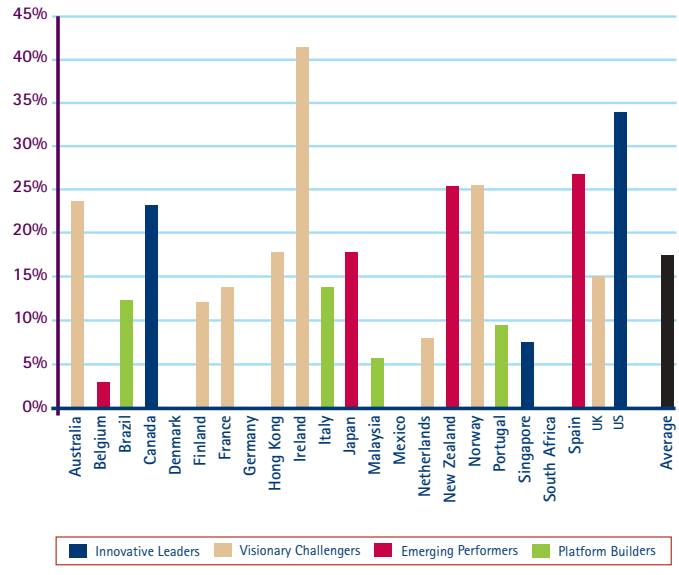


Figure 8: Human Services Overall Maturity Change by Country - 2001 to 2002



The Japanese Helloworks service allows jobseekers to search for job opportunities and to match their skills and employment preferences with positions available. Employers can also find out how to post job opportunities, and users can access information on unemployment benefits.

The Norwegian service provides extensive jobsearch opportunities both for employers and jobseekers as well as a test allowing jobseekers to get career recommendations based on their interests and skills.

leading edge practices_

www.ajb.org

www.jobsearch.gov.au

- ✓ Access a directory of the services available at the "virtual office"
- ✓ Access information regarding digital certificates.

www.hrdc.gc.ca

Two other examples of leading Human Services practices are outlined briefly below:

Canada's Electronic Labor Exchange – www.ele-spe.org:

- ✓ Matches work to people and people to work
- ✓ Enables employers to find suitable job seekers

Spain's Social Security Service website – www.seg-social.es – enables citizens to:

- ✓ Locate a Spanish social security office

Revenue

Revenue agencies have historically been among the first in the public sector to deploy new technology, due to the relative ease of establishing a business case for faster revenue collection and increased compliance. Mature online service delivery gives Revenue agencies the opportunity to deliver a highly effective personalized service and reduce the costs of compliance.

Revenue agencies worldwide are facing increasing pressure to accelerate both revenue collection and compliance levels. In order to achieve these goals, the leading Revenue agencies are articulating and implementing sophisticated online strategies. Online filing of tax returns is just one element of these programs, and covers a broad range of functions from simple, one-directional transfer of forms to sophisticated, interactive and transactional facilities.

This year's survey identified Revenue as the most sophisticated and mature online government sector. With an average score across the 23 countries of 51.6 percent, it is comfortably ahead of the next strongest sector Postal, on 42.6 percent, and well ahead of the average of 36.7 percent.

Leadership in the Revenue sector is closely correlated with eGovernment leadership. Countries lagging in the

eGovernment leadership stakes would be well advised to focus their limited resources on their Revenue agency's online strategy. Starting with Revenue has proven to be a smart strategy given that results can be driven quickly through eFiling programs. In addition, they are highly visible given that almost every citizen and business is a customer of the Revenue agency, and the accelerated collection and increased compliance can drive development of more eGovernment initiatives. Furthermore, providing Revenue services online to business builds business confidence in eGovernment and in eCommerce generally. These services can act as a proof of concept for eGovernment as a whole.

In online service delivery, Revenue boasts a leading group of six countries - led by Spain and including Canada, Denmark, Germany, Ireland and Singapore. As Figure 9 demonstrates, all scored well above the average sector score of 51.6 percent, ranging from Spain's excellent 77.1 percent to Ireland's 72.5 percent score. The next group of nine countries scored around the average - Australia, Belgium, Brazil, France, Hong Kong, the Netherlands, Norway, the United Kingdom and the United States. The remaining eight countries scored between 26 percent and 43 percent. However, this tells only part of the story.

When we examine year on year change in Revenue agencies and cluster the countries by their rate of change, a different pattern emerges - illustrated in Figure 10. The five biggest increases over the last year were recorded by Germany, the Netherlands, France, Belgium and Brazil, all increasing their overall Revenue maturity by comfortably more than the average of 25.8 percent. With the next six highest growth countries comprising Italy, Ireland, Mexico, Spain, South Africa and the United States, it becomes clearer that while the Emerging Performers and Platform Builders are currently behind overall, they are making strides at a faster pace than the Innovative Leaders and Visionary Challengers.

Reflecting the importance governments place on developing online revenue solutions, there is no shortage of leading edge Revenue sites, most of which are focused on the payment of taxes electronically. The six examples illustrate the breadth and complexity of what federal governments can and do provide. Interestingly, there is an example from each of the four overall categories - from Innovative Leaders to Platform Builders.

The Office of the Revenue Commissioners (Revenue) administers all taxes levied by the Republic of Ireland. Revenue is taking the lead in the Irish government sector in providing online services to citizens through ROS (Revenue Online Service) - www.ros.ie. ROS facilitates voluntary compliance as taxes may be filed

Figure 9: Revenue Overall Maturity by Country - 2002

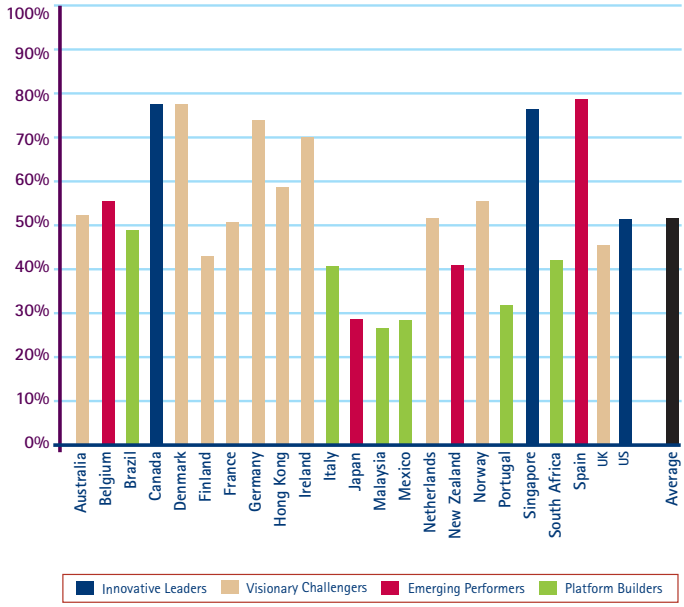
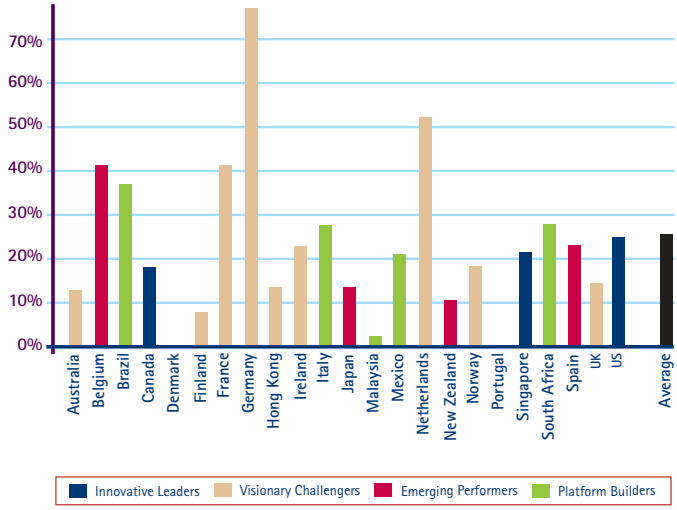
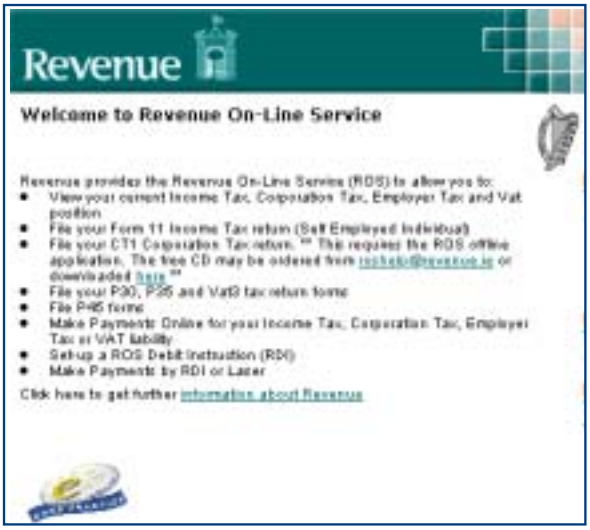


Figure 10: Revenue Overall Maturity Change by Country - 2001 to 2002



and paid rapidly online. It also significantly improves customer service, as Revenue services are available to taxpayers and their agents in their place of employment, business or in their homes out of normal business hours. It encourages the electronic filing of tax returns, declarations and other electronic information exchange removing data entry work within Revenue. ROS enables customers to use the Internet to file returns electronically, make payments and perform enquiries on their current tax position and their previous tax transactions. Customers using the service are issued digital certificates to enable them to digitally sign legally enforceable tax returns.

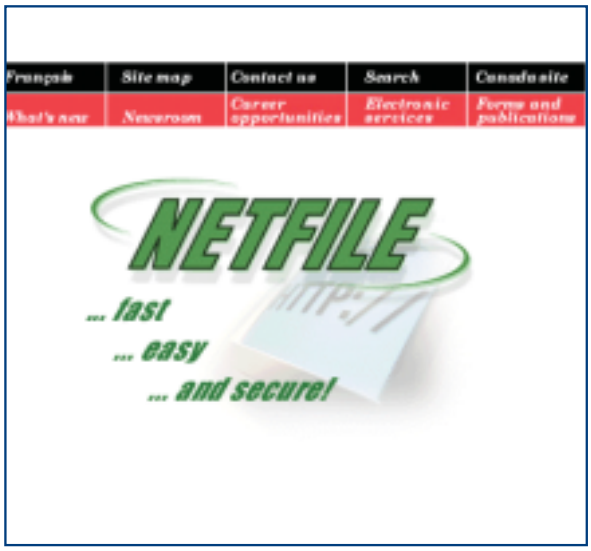
leading edge practices_



www.ros.ie

www.aeat.es

www.impots.gouv.fr



www.netfile.gc.ca

Spain's leadership position in Revenue is driven by La Agencia Tributaria, the Spanish government agency responsible for the management of taxation, customs and excise. At its site - www.aeat.es - it is possible to make a tax return payment electronically using a digital signature while determine the status of a tax return, while providing guidance regarding payment along with all relevant tax information.

At the beginning of 2002, the French tax administration launched a new Revenue-focused portal - www.impots.gouv.fr - that provides a large range of services from online information to transactional services such as payment and declaration.

The administration's goal is to build a set of services centered on taxpayers' needs. A first segmentation was done by taxpayer type - private, corporate or third party. The tax administration is looking to have the services structured in two ways: anonymous services on one side where the users can surf without being known by the administration and a private and personalized area with authentication where the users can select their own preferred set of services and receive the information in which they are interested. The personalized aspect is not yet active, but is projected for the end of 2002.

The overall leader, Canada, has two leading Revenue services - one for citizens and one for businesses. One of Canada's newest electronic tax-filing options is NETFILE - www.netfile.gc.ca. This service allows the user to file personal income tax and benefit returns directly to the Canada Customs and Revenue Agency (CCRA) over the web. NETFILE is available to most Canadians, with the restriction that there are some types of tax returns that cannot as yet be submitted electronically. It streamlines the tax-filing process, provides a secure and confidential medium, enables faster refunds (generally in two weeks), ensures greater accuracy, removes the need to mail in a paper return, receipts unless requested at a later date, with the user receiving immediate confirmation that the tax return has been received. If the citizen decides not to use the NETFILE service, they may be eligible to use one of the other electronic tax-filing methods, such as EFILE or TELEFILE.

The CCRA - www.ccra-adrc.gc.ca - also supports business clients so they can meet their fiscal obligations and receive their entitlements. Many financial institutions permit citizens to pay their business or personal taxes electronically. The CCRA describes available payment options and provides hyperlinks to the web sites of participating financial institutions. Canadian businesses can pay their business taxes electronically through their financial institution's telephone and Internet banking services.

Leading Revenue solutions are not limited to the top performers overall. South Africa's My Tax - www.mytax.co.za - is a joint venture between private companies and the South African Receiver of Revenue (SARS). It is a service that enables all businesses, provisional taxpayers and accounting firms to file various statutory returns directly with the SARS via the web. MyTax facilitates the electronic submission of VAT, PAYE, Skills Development Levy (SDL) and Provisional Tax. The site also includes other useful facilities such as being able to view all individual correspondence with SARS, full payment and forms submission history, help facilities and online guides, reminders, end-to-end forms and payment tracking, electronic confirmation of all transactions; in short, everything needed to efficiently and effectively manage the relationship with the Receiver of Revenue. When a citizen becomes registered, MyTax.co.za enables real-time payment to SARS via a secure connection over the web.

Other examples of note include Denmark's services for private citizens to calculate their tax returns - www.tastselv.toldskat.dk, and for corporate citizens to lodge entries for imported and exported goods electronically for clearance by Customs - import.toldskat.dk.

In Norway, the Revenue Service offers an online, PIN-based, service - www.skatteetaten.no - to correct future tax deductions and submit income statements. Portuguese citizens can use www.dgci.mailcom.pt to pay or receive income tax money. In Japan, while the Tax Automatic Answer Network System for Electrical Request (TAXANSER) - www.taxanser.nta.go.jp - does not have any transactional services, it acts a portal for all tax related information from the National Tax Agency. At the Brazilian government's revenue website www.receita.fazenda.gov.br, citizens can complete their income tax forms online and calculate their tax return.

InterVat is an application provided by the Belgian Ministry of Finance - www.minfin.fgov.be . Launched in February 2002, it allows companies to declare their VAT online. InterVat facilitates a secure (PKI-enabled) exchange of information, which allows users to submit their declaration faster, providing a less labor-intensive process, better security and electronic acknowledgement. The application avoids re-entry of existing data by the administration and processes input and validation automatically, leaving the administration to the task of exception handling.

To maximize benefits, eRevenue solutions must be an integral part of an overall plan for improving revenue administration. These operational benefits, along with the aspirations of government to set an example, create a compelling case for the rapid adoption of eGovernment in Revenue agencies.

Postal

Postal Agencies are experiencing a time of unprecedented change. Changing demand, customer expectations and needs, pressures from competition and the regulatory environment, and opportunities presented by new technology are all affecting the Postal marketplace. The sector is facing globalization trends very similar to those experienced in the Communications, Airline and Utilities industries. The transformational issues and changes will therefore be very similar. Postal enterprises must capitalize on new technology to improve current services and drive new services for the eEconomy.

Postal agencies must establish a customer-centric culture and create a customer-focused business model - they must make it easier to do business with the post office. CRM has the potential to improve the service offered by Postal agencies through moving to modes of operation driven by citizen intentions. Postal agencies will be better positioned to match services to specific needs and preferences, and to create new higher value service offerings.

Customers need to be able to obtain the information they want and complete transactions online. For

leading edge practices_

example, Postal agencies might offer enhanced package tracing services, advance scheduling of parcel pickups, guaranteed delivery times and online change of address notices. They might display an electronic menu of services with the related costs, and provide the capability to view and pay individual postal account statements. Furthermore, the Internet may also enable consumers to filter out unwanted mail, and select categories of direct mail literature and publications that they would like to receive.

Comparing Postal Agencies based on this year's survey results highlighted a leading group of six countries. Lead by the United States and including the Netherlands, Norway, Germany, Finland and Canada, the sector leaders are a mixture of Innovative Leaders and Visionary Challengers. As is clear from Figure 11, all score well above the average sector score of 42.6 percent, with Deutsche Post enabling Germany to achieve an impressive 90.5 percent. The leading group is followed by countries that received above average scores - the United Kingdom, France, Italy, Portugal and Singapore. The remaining countries fall short of the average sector score.

On examining year on year change in Postal agencies and clustering the countries by their rate of change, four of the six online service delivery leaders figure in the group of seven with the greatest increase in Overall Maturity over the last year. These are Germany, the United States, Canada, Italy, the United Kingdom, Belgium and the Netherlands, as can be seen in Figure 12. The range of the top group spans the Netherlands' rise of 23.3 percent to Germany's 50.1 percent jump. With an average rise per country of 20 percent, Postal is maturing faster online than all sectors except Revenue. Only a handful of countries recorded little or no progress over the last year.

Leading Postal organizations are described below, drawn equally from the Innovative Leaders and Visionary Challengers category.

Canada Post Corporation (CPC) has in the last year updated, enhanced and re-launched its corporate website - www.canadapost.ca. The new site is designed around a new look and feel that is more customer-centric and intuitive. In particular, the site now consists of two portals - one for CPC's commercial customers

Figure 11: Postal Services Overall Maturity by Country - 2002

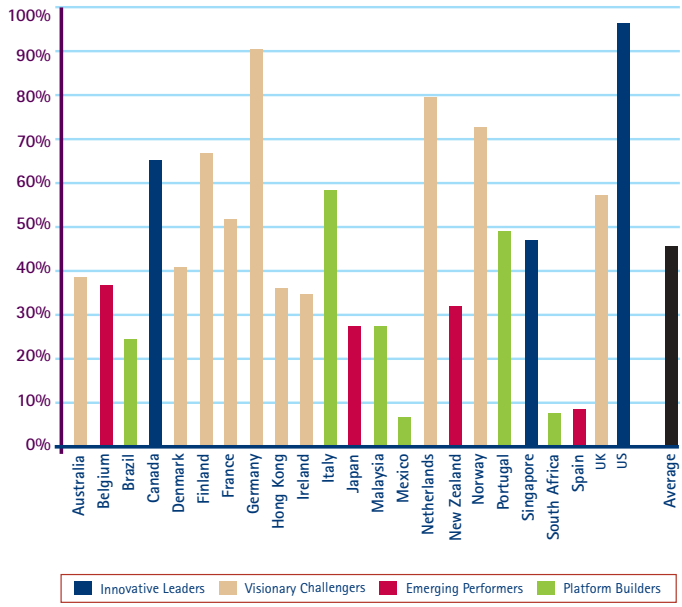
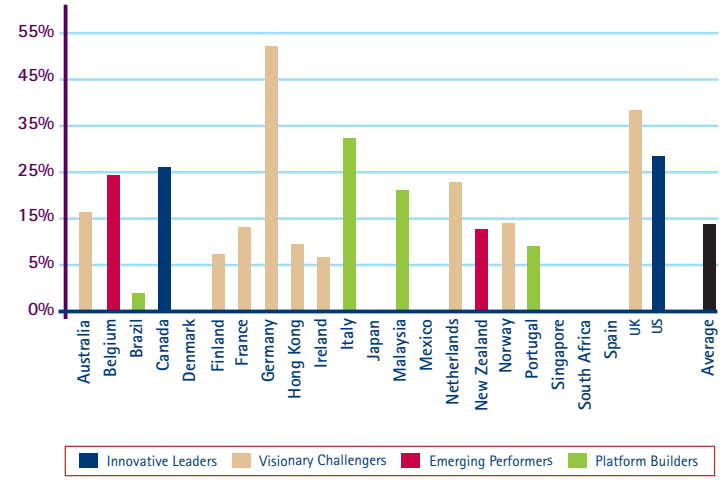
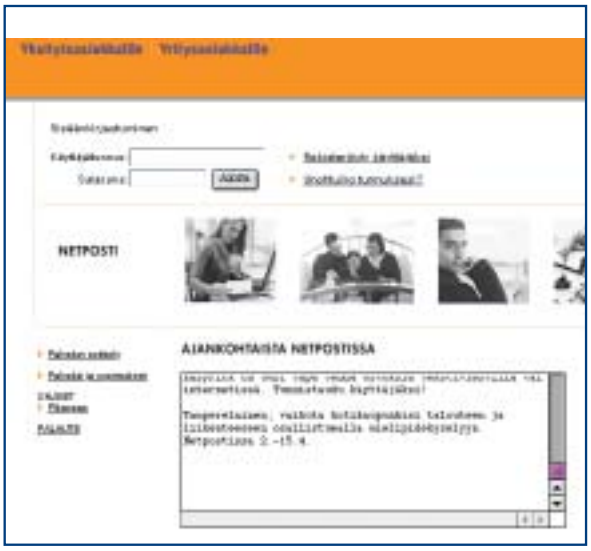


Figure 12: Postal Services - Overall Maturity Change by Country - 2001 to 2002



(the business portal), and a second portal for consumers (the personal portal). Each portal provides content and access to CPC applications in a context appropriate to these two audiences.

www.canadapost.ca



www.netposti.fi

www.consignia-online.com

www.usps.com

Netposti - www.netposti.fi - is the electronic mailbox service offering of Finnish Post, enabling the handling of electronic letters and bills. In addition to the fully integrated online payment features through major banks, other major players such as phone operators, credit card and publishing companies are integrated in the partnership network. Other value-adding services such as electronic postcard, SMS and email services are also provided.

In the United Kingdom there are two leading postal sites - www.royalmail.com and www.consignia-online.com. Information from EasyWeigh to purchasing stamps is provided and end-to-end transactions are possible using a credit card. Customers are allocated reference numbers for their transactions and guidelines are given as to when goods will arrive. Consignia in particular allows the user to set up an account, which is accessed via a password. A history of past purchases can be located and it is possible to set up a current delivery address book.

United States Postal Service (USPS) Payment Services offers American customers a central, secure online site for paying bills, sending money and paying for online auction merchandise after it is delivered. From the agency's website, www.usps.com, the customer can view and pay bills from anywhere using multiple bank accounts. At www.moversguide.com, customers can change their address; an email and paper mail follow-up occurs for security and practical purposes.

Other examples of leading practices in Postal agencies include those in Australia, Malaysia and Denmark.

leading edge practices_

Australia's POSTbillpay service - www.postbillpay.com.au:

✓ Leverages postal distribution network by adding bill payment services

✓ Facilitates users receiving and paying both electronic and paper bills, and enables users to schedule payments

✓ Means that payment details need only be registered once and security is guaranteed

A similar service is provided in Malaysia, as utility bill payments and inquiries can be executed at the site www.rilek.com.my. RILEK is equipped with high-end multimedia facilities and system support to accommodate heavy traffic flow and is capable of processing information at high speed.

Denmark's service, available at www.stamps.postdanmark.dk:

✓ Permits users to obtain information regarding parcel and letter postal rates

✓ Enables stamps to be purchased

Postal agencies are offering added value to the citizen, and have moved beyond the traditional role of moving mail around to enabling citizens to carry out such tasks as paying utility bills, registering a change of address and purchasing electronic stamps.

There are five key areas of eCommerce opportunities that we believe encapsulate the principal opportunities in the Postal industry. Three of these areas provide a new role and/or extended business opportunities that will generate increased revenue and contribution by creating new or added value for consumers:

- Supply chain services - building on existing competencies in the distribution of physical goods
- Messaging services - providing an integrated approach to the increasingly complex world of electronic and physical messaging
- Secure and Trusted eService - building on the trusted brand that Postal enterprises possess to offer services such as eBilling and ePayments and online shopping in a secure setting

The remaining two areas do not provide fundamentally new services, but instead seek to make cost and efficiency savings and maintain the agency's position in the competitive marketplace:

- Automating/enhancing the customer interface - providing increased use of automated transactions and customer self-service to reduce costs and increase revenues
- Optimizing internal business processes - using Internet/intranet technology between the Postal agency and its partners/suppliers

Furthermore, it is often the case that people who most need to avail themselves of a government service are those that are least likely to have online access. The Postal agency's infrastructure and distribution network could be used in some countries to bridge the digital divide through offering online access at kiosks in post offices for multiple government agencies.

Education

eCommerce and eLearning are the most important trends in Education, promising to transform how education services are delivered. Our focus in this study has been on the administrative side of Education; government services that are focused on giving individuals access to educational institutions, to application and placement processes, and to grants programs. The research did not examine the eLearning aspects of Education to any great degree, as these are principally provided below the federal government level, the focus of this research.

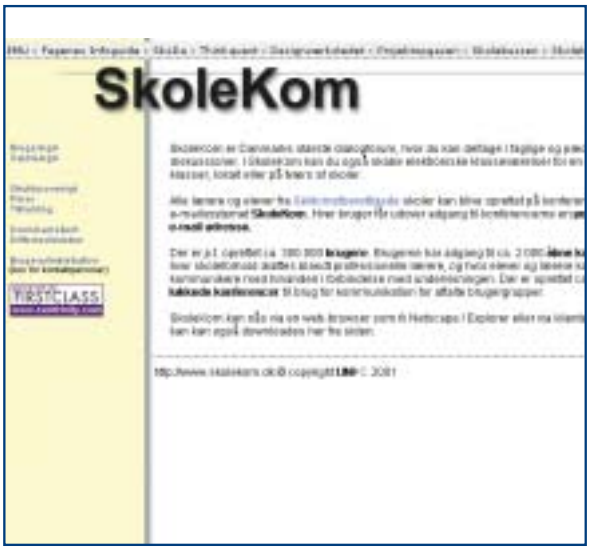
Education agencies are faced with a unique opportunity to extend their services across the globe. The Internet, eCommerce and new learning technologies provide a way to remove time and distance barriers enabling Education Agencies to reach and serve students in ways that were once unimaginable.

This year's survey highlighted a leading group of three countries that stand out from the others on the basis of online service delivery. The group includes two Innovative Leaders, Singapore and the United States, and one Visionary Challenger, Denmark. As illustrated by Figure 13, all score well above the average sector score

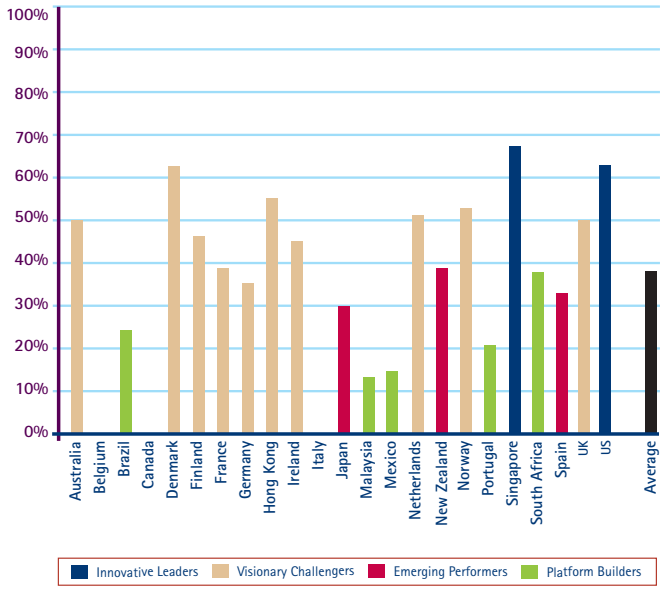
www.edna.edu.au

www.fafsa.ed.gov

Figure 13: Education Services Overall Maturity by Country - 2002



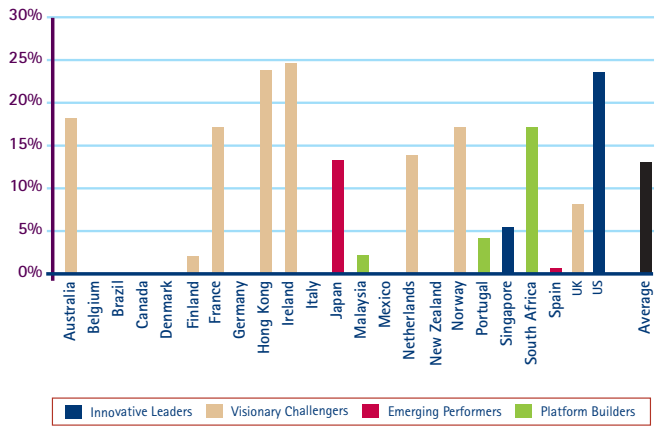
www.skolekom.dk



of 38.5 percent, from Denmark's 62.6 percent to Singapore's 68.8 percent. This leading trio is followed by seven Visionary Challengers, all of which also exceeded the Education sector average - Australia, Finland, Hong Kong, Ireland, the Netherlands, Norway and the United Kingdom. The Visionary Challengers and Innovative Leaders are farther along the maturity curve for Education services. Belgium, Canada and Italy do not provide a sufficient number of services at the federal level, so were not considered for the purposes of the Education sector comparison.

When we examine year on year change in Education and cluster the countries by their relative rates of change, three countries stand out as having increased by more than the average - Hong Kong, Ireland and the United States. Figure 14 illustrates that with increases of between 23 percent and 25 percent, this group was

Figure 14: Education Services Overall Maturity Change by Country - 2001 to 2002



far in excess of the average sector rise of 12.8 percent. Australia, France, Japan, the Netherlands, Norway and South Africa also recorded above average increases since the last survey.

The survey identified several examples of education departments and educational institutions delivering superior services online in order to simplify procedures, to promote educational opportunities and to enhance the student experience. Services from three countries are exhibited here.

Education Network Australia - EdNA Online service - www.edna.edu.au - aims to support and promote the benefits of the Internet for learning, education and training in Australia. It is organized around the Australian curriculum, its tools are free to Australian educators, and the bodies responsible for education provision in Australia fund it. As an information service, EdNA Online provides two key functions, a directory about education and training in Australia and a database of web-based resources useful for teaching and learning. As a communications service, it aims to promote collaboration and cooperation throughout the Australian education and training sector and nourish the growth of networks of common interest and practice. As a service provider to education and training systems and sectors, EdNA Online also provides a range of tools to assist in the management and discovery of information resources.

Sektornet is a special connection to the Internet provided for schools in Denmark. Through www.skolekom.dk more than 2500 Danish educational institutions are connected to Sektornet - the gateway to the Internet for more than half a million Danes. Furthermore, people aged 18 or over are entitled to receive government support, regardless of social standing, when pursuing their education. The government grant is intended to aid students in covering their tuition fees. An entirely separate body offers support for living costs. The relevant application form for the government grant can be downloaded at this site, www.su.dk.

In the United States, the Department of Education's Free Application for Federal Student Aid (FAFSA) program - www.fafsa.ed.gov - opens the door to the federal aid process. Users can determine their eligibility for aid, and complete an application for financial aid. The completed application form is sent electronically to the relevant college or university chosen by the applicant and each individual educational institution then decides the funding package.

Other leading examples from the Education sector are provided by Ireland and South Africa.

The purpose of the Central Applications Office (CAO) - www.cao.ie - is to process centrally applications for admission to the first year of undergraduate courses in institutions within the Republic of Ireland. Students may also receive their Leaving Certificate examination results online using the service. The site also permits students to access their college offers as soon as these have been allocated. Students Online (SOL), www.unisa.ac.za, is a service for registered University of South Africa (Unisia) students to gain access to administrative and academic services via the Internet. Online registration is available and examination results and career guidance can also be obtained from this site.

Moving administrative processes online is only the tip of the iceberg in terms of the promise that the Internet holds for transforming learning. The real opportunities lie in using the Internet to create a new channel for the learning experience itself.

Justice & Public Safety

Justice & Public Safety received the lowest score of all government sectors in this year's survey, with an average across the 23 countries of 20.7 percent. This reflects the emphasis government has placed on other sectors that traditionally present a more compelling business case, such as Revenue and Postal, and also the perception that the Internet has little to offer to Police, Courts and Corrections agency functions. However, this perception is changing.

The public is demanding better service, faster responses, and greater accountability. Furthermore, since the events of September 11 in the United States, there is an increased demand worldwide for what the United States has called Homeland Security. Additional investments are being made in the Justice & Public Safety area to address this demand. Such investments include those in technology infrastructure for networking and sharing information more quickly and easily, as well as investments in eGovernment to provide access to stakeholders such as agents, officers,

public officials and citizens. Additionally, there are demands for changes in the way information is obtained, stored and shared, not only to provide access to information to enable quick reaction to situations, but to anticipate and proactively prevent the incident.

The Police, the Courts and Corrections agencies are exploring alternative solutions to their traditional methods and are examining both new processes and new procedures, which could leverage Internet technologies. For example, a court decision that results in a prison sentence necessitates documentation being sent from the Courts to the Corrections Agency, and also to the Police to inform them of the conviction. Web-enabling such information transfer provides a more efficient and more effective way of sharing this critical data.

It is important to emphasize that this survey measures customer-focused online services and does not reflect integration efforts being undertaken by various governments across the Justice & Public Safety sector.

As Figure 15 illustrates, this year's survey identified a leading group of four countries that stand out from the others on the basis of online service delivery - led by Australia and including Singapore, the United Kingdom and the United States. The quartet scored well above the average sector score, from the United States' 33.9 percent to Australia's 55.8 percent. They are followed by four countries that also comfortably exceeded the sector average - Belgium, Denmark, Netherlands and New Zealand. All six of the Platform Builders clearly have scope to improve in the Justice & Public Safety area. Canada does not provide a sufficient number of services at the federal level, so was not considered for the purposes of the sector comparison.

Examination of the year on year change in Figure 16 points to six countries that stand out as having increased more than the average - the overall leader, Australia, Belgium, France, the Netherlands, Singapore and the United Kingdom. Australia's 24.9 percent rise was powered by the unveiling of a new federal courts service, which is described below. Outside of these six, others who exceeded the average rise of 10.2 percent were Hong Kong and New Zealand.

Three leading Justice and Public Safety sites were identified by the research; one related to online filing of court applications, another to online payment of fines and a third to filing claims online.

Australia, the sector leader, can point to The Federal Court of Australia website - www.fedcourt.gov.au - as a leading service. It provides information about the Court, its history, current practice and reasons for judgments. Applications and other documents may

Figure 15: Justice & Public Safety Services Overall Maturity by Country - 2002

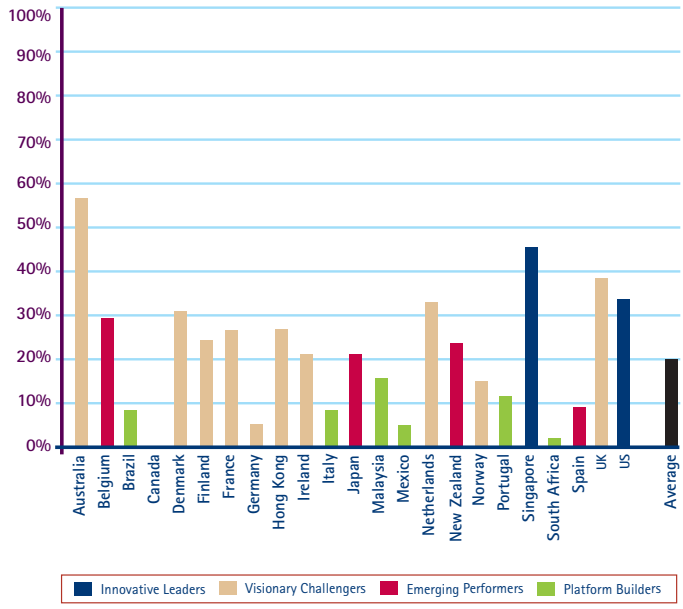
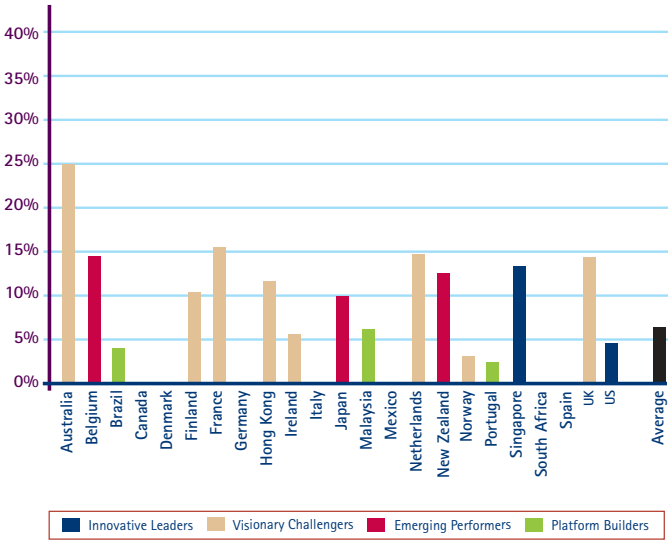


Figure 16: Justice & Public Safety Services Overall Maturity Change by Country - 2001 to 2002



be filed or lodged electronically with the Court in accordance with the Federal Court Rules.

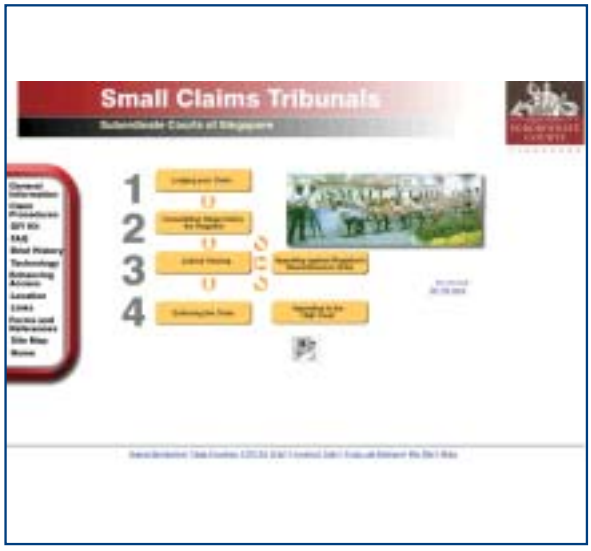
At the Belgian Ministry of Justice's website - www.just.fgov.be - it is possible to pay all fines electronically. The fines are received by post and payment can be made by telephone banking, ordinary wire transfer or by electronic banking.

The Subordinate Courts of Singapore allows certain authorized users to lodge or file small claims online at its website - www.smallclaims.gov.sg. However, there are plans to open this electronic filing service up to the public soon.

leading edge practices_

www.fedcourt.gov.au

www.just.fgov.be



www.smallclaims.gov.sg

Effective administration of the justice system requires access to current information, and there is a range of unexplored opportunities in this area. Providing law enforcement officials with the best most up-to-date information at all times enhances decision-making. Many justice systems have recognized the potential of eGovernment to improve their operations but still have a long way to go to fully exploit these new technologies.

Democracy

In terms of citizen participation in democratic society, evidence exists in many countries of declining rates of participation in democratic processes. In order to curb this declining public interest, there is a need to place politically useful information online and to encourage democratic discussion in a neutral fashion. Citizens must be empowered to have more input into and more influence over the political process, in order to overcome the risk of government becoming disconnected from its citizens. In this section, some leading practices in the area of eParticipation are identified and described.

Using online channels to promote participation in democratic processes is a relatively under-explored capability to date. However some powerful examples are emerging of federal governments reaching out to citizens in this manner.

The United Kingdom Parliament began webcasting parliamentary debates in January 2002. Its four-channel website - www.parliamentlive.tv - provides coverage of live debates in both houses of Parliament, coverage of select committees, and of Westminster Hall. This follows the wider government initiative announced by Leader of the House of Commons Robin Cook, to make Parliament more accessible and relevant. The service is receiving a 12-month trial. Citizens are encouraged to provide feedback to the developers, and

it is expected that further additions will be made during the trial period.

In the United States during the 2000 presidential election, the Federal Voting Assistance Program conducted an Internet pilot for military and overseas civilian voters. The pilot was for a maximum of 250 people - only 99 people registered and 84 people actually voted over the Internet. These votes were actually counted and contributed to the national election results. While this is an extremely small population, it is evidence of governments exploring the potential of online voting in national elections.

"Using online channels to promote participation is an under-explored opportunity"

South Africa's Independent Electoral Commission uses its website - www.elections.org.za - as one of its primary means of communication. It provides functionality for voters to locate where they should register and vote, through using maps or text searches on address information. It provides registered voters with information regarding their current registration details. Election results are automatically published on the website with comparison information, graphs, historical information and detailed results per voting district. The site also provides up-to-date information on the registered political parties, links to legislative aspects regarding the Independent Electoral Commission and elections, as well as statistics on registered voters such as breakdown of number of people registered per age group and gender.

Finland's Otakantaa - www.otakantaa.fi/kaynnissa.cfm - is an easy to use interactive service for public discussions (including online debates) on highly topical issues - ranging from taxation and digital television to military service. One ministry hosts and facilitates this service each month.

eParticipation could potentially arrest the apparent decline in citizen participation by ensuring citizens are informed, involved and influential. Citizens can become

www.parliamentlive.tv

www.elections.org.za

more informed through government provision of online access to public reports and documents and through the webcasting of government debates. Involvement can be encouraged through facilitating online discussions on government sites that tackle key issues such as the economy, education or health. Citizen influence can be nurtured through submitting for debate real public policy issues online before taking a decision. Such measures enable the move from passivity to participation, from exclusion to inclusion.

the security and privacy imperative_

Public confidence is key to success in continued implementation of eGovernment. In each of the countries surveyed, there are initiatives underway to ensure information and individual privacy are protected. Beyond information and individual privacy, there are issues of national security, global competitiveness and protection of civil liberties that must also be addressed.

Considerations of data security and protection of individual privacy are assuming increasing importance. eGovernment programs typically incorporate approaches to issues such as uniform privacy practices, digital signature standards, and encryption standards for sensitive information.

Governments recognize that they must be able to assure their citizens that the information they are maintaining is secure and will be protected from unauthorized use, and that citizen privacy will be protected. However, pragmatism is required. The level of security must be appropriate to the service concerned, as not all transactions require the same level of security.

Consider the plethora of numbers that an individual requires to interact with their government; passport number, driver's license number, health insurance number, social security number, tax file number, identity card, to name a few. The efficiencies possible in integrating this proliferation of identification points into one single record are considerable. Equally outstanding is the risk if this information is abused. Identity theft is a very real concern under a scenario where each citizen has a single record. A single record however is not necessarily the only solution to this issue. Governments are looking at alternative ways to bring this information together without the need for a single piece of identification, an approach that should alleviate citizen concerns about the risks associated with a single identifier.

Government must be able to guarantee the security of personal information. The technology to enable this security is now commonplace. The challenge governments now face is putting the right processes in place to ensure public confidence in government information management. Government must convince its citizens that it can manage the risks appropriately.

Each country surveyed is adopting different practices to create a secure environment. President Bush's proposal for a $100m eGovernment fund in the US would focus heavily on the development of digital signature technology for secure online communications with federal agencies.[2] The Federal CIO has mandated that no agency could procure an information system or initiate collection of personally identifiable information

unless the agency had conducted a privacy impact assessment and submitted the assessment to the Federal CIO.

An increasing number of government web sites are now offering privacy and security statements in order to comply with privacy legislation. All 23 countries had some form of data protection legislation but the research found a wide variation in the implementation of secure transaction capabilities.

In Ireland, the government's plans for a central Public Services Broker include security measures to prevent one public service agency from gaining unauthorized access to information relating to a person's transactions with another department. The Irish government is keenly aware that citizens own their own data. The Public Services Broker will give customers as much control as possible over the release of data from their personal data stores, all access to personal data will be recorded and staff will be unable to view personal profiles unless the customer grants permission.[3]

Smart cards are an emerging development that have the potential to transform interactions between citizens and government, and one that tests the boundaries of the privacy / security debate. On the one hand, the advantages of being able to interact with government through an entirely new channel promise greater efficiencies and an enhanced service experience. On the other hand, in some countries there is an inherent aversion to this form of identification, notwithstanding the advantages it offers.

The challenge with smart card issuance is not only in countering public concerns about security and privacy. Smart cards will take hold, and these concerns will be alleviated, only if there is sufficient incentive for citizens to use the cards. Italy experienced this problem with the launch of its smart card in March 2001, for which take up has been disappointingly low due to a lack of applications. The primary use of the card is to sign legal documents electronically. Finland also experienced low take-up rates for its smart card program, with only 0.2 percent of the Finnish population using the card due to a lack of incentives for people to use the cards.

Malaysia has begun issuing MyKad, a credit card sized device with an embedded microchip designed to be an access key to a range of government and private sector services. In its first phase of implementation the card will incorporate four applications - an identity card (replacing the paper card carried by all Malaysians over the age of 12) , driver's license, passport information and eCash. Further applications will be added over time. By 2007 the Malaysian Government estimates over 20 million Malaysians will carry the card.

The Hong Kong government announced in March 2002 a new smart identity card to be issued to all residents by 2003. The cards will initially contain information on the holder's residency status, and may also form the basis of an automated passenger clearance system. Financial applications may also be added to the card.

"Smart cards are an emerging development that have the potential to transform interactions between citizens and government"

[2] Iweek.com, 17 April 2001

[3] The Irish Times, 9 November 2001

uGovernment: the next wave_

Each year in conducting this research we attempt to identify how governments are recognizing emerging trends, and how they are capitalizing on new technologies to improve their service delivery.

In 2001, we introduced the concept of CRM for the first time. It was not surprising that the research found scant evidence of government awareness of CRM and its power to enhance customer relationships. In 2002, by contrast, the research found that many of the eGovernment leaders were now employing the powers of CRM.

uCommerce is the next wave. uCommerce is the extension of the eCommerce business model through the application of a range of emerging technologies, such as wireless, television, voice and silent commerce. uCommerce is expected to have a greater impact in both the public and private sector than "traditional" eCommerce.

Accenture recently undertook a study examining the perceptions of executives in both the public and private sectors toward eCommerce. *The Unexpected eEurope*, which draws upon interviews with 840 executives in 25 countries, is the first in-depth analysis of executive attitudes toward eCommerce since the onset of the current economic slowdown. It highlights a surprisingly high level of interest in the adoption of new technologies to reduce costs and improve services.

For governments, the findings are of particular relevance. Respondents believe that uCommerce will provide new and exciting opportunities to build the relationship between governments and their customers. uCommerce provides the capability to enable governments to reach out more effectively to their customer base. Emerging uCommerce technologies offer new opportunities for eGovernment. By extending eCommerce to every telephone and television set, they will enable governments to deliver services to almost every household and business. This will be particularly valuable in those countries where few homes have personal computer access. By providing services through, for example, interactive digital television, governments can not only reduce the cost of delivering services, but also encourage the broader take up of interactive television.

Government executives are aware of the opportunity this represents. In the study, *The Unexpected eEurope*, when asked whether emerging uCommerce technologies will provide more opportunities than traditional eCommerce over the next three years, 90 percent of executives in the public sector agreed, as opposed to 83 percent of those in the private sector. Governments that take the lead in traditional

eCommerce are likely to be best placed to exploit uCommerce opportunities because they have already invested in technology, begun to coordinate different agencies, and got their citizens accustomed to different channels. While governments have largely followed the private sector in establishing online services, emerging uCommerce technologies will provide government with an important opportunity to take the lead by making their own services accessible via new channels.

In government, uCommerce has enormous potential, for example for Revenue agencies. Imagine the transformation that would result from embedding all taxation procedures at the point of sale. For Licensing & Registration agencies, uCommerce could enable the automatic renewal of motor vehicle registrations though sensors that recognize the due date, evaluate the condition of the vehicle, authorize and remit payment for registration. For Human Services agencies, monitoring of elderly customers could ensure they are taking the right medication and nutrition, lessening the demand on field workers. In Customs & Immigration agencies, with voice recognition and biometrics built in for better security, mobile devices will augment passports and visas.

This is a world in which low-power radio frequency sensors allow for a constant flow of information in every environment - the home, the car, industry, and government.

Not surprisingly, the research found little evidence as yet of governments harnessing the power of uCommerce to deliver services to citizens.

Finland was identified as the leader in provision of services using wireless technology. The research identified a number of services whereby citizens can utilize the country's online banking system to pay taxes and charges via a mobile device. Indeed, the seamless integration of mobile communications with the private sector online banking system in Finland proved to be unique in the research. In the Education sector, Finnish institutions such as the University of Technology offer a service for students to enroll in their examinations via mobile phone.

In Singapore, the Supreme Court has launched an SMS service to alert citizens to the time and date of trials. Outside of these services, the research found precious few examples of uCommerce.

However, we expect this picture will look very different in 12 months time, in particular for those countries with high mobile phone penetration rates. The number of mobile connections worldwide will increase from almost 727 million at the beginning of 2001 to almost 1.5 billion by the end of 2005.[5] By 2005, 500 million mobile devices will offer Internet access - a number that outstrips personal computers.[6] Globally the market for small wireless Internet capable devices, including handheld computers, basic micro browser phones, smart phones and next generation multimedia phones, is set to grow from $10 billion in 2000 to $73 billion in 2005.[7]

"The research found little evidence as yet of governments harnessing the power of uCommerce to deliver services to citizens"

This presents an enormous opportunity for governments to lead the way. In another Accenture study entitled *The Future of Wireless: Different than you Think, Bolder than You Imagine*, published in June 2001, researchers found that only 15 percent of global wireless users out of 3,500 respondents say they are accessing the Internet through a wireless device. In Germany only 16 percent of respondents had used a mobile phone for this purpose, in the United Kingdom only 10 percent, and in the United States and Finland only 6 percent. The corresponding Japanese number was 72 percent. The research concluded that while consumers love wireless, they want data capabilities but not in their current forms. The data future of wireless devices lies in yet to be developed applications that will significantly increase the take up of wireless.

[5] Ovum 2000

[6] Accenture analysis based upon estimates from Dataquest, Nokia, Ovum, Ericcson, Yankee Group, Jupiter Communications

[7] Nitesh Patel Wireless Web Device sales to Hit $75 billion by 2005 Strategy Analytics Press Release, 16 August 2000

AUSTRALIA	
Overall Maturity	Visionary Challengers
2002 Rank	4
2001 Rank	5
Vision Introduced	2000
Vision Title	Government Online

Vision Summary

The Federal Government's aim is to develop more and better online, integrated services that break down the barriers of Government structure and jurisdiction, and meet the real needs of individuals and business.

Internet Penetration Rate 58 percent

Australia_

Australia made significant gains during 2001 to achieve fourth place in overall rankings, moving to the top position among the Visionary Challengers.

Much of the gains made were in the Service Breadth measure, due to a significant increase in the number of services offered online. However, relatively slow progress in developing services at the Interact and Transact levels has held Australia back from entering the Innovative Leaders category.

Of the 115 services in this research that the Australian Federal Government could deliver online, 105 are available to some degree, giving a Service Maturity Breadth of 89.6 percent, which exceeds the global average of 85.8 percent. Of these, a total of nine new services were introduced in 2001, including the Australian Electoral Commission www.aec.gov.au now providing enrolment forms for voters to download and complete manually, and the Department of Transport & Regional Services website www.grantslink.gov.au enabling farmers to apply for grants.

Australia's Service Maturity Depth score, which indicates the maturity of services delivered over the internet, is 49.7 percent. While above the global average of 45.9 percent, the rate of Australia's improvement on this measure, 5.9%, was behind that of other Visionary Challengers such as Norway and Finland.

The expansion of government services delivered via the internet is spurring citizens' usage, with a recent survey indicating at least one in four Australians visited a government site during July 2001.[1]

The Australian government developed two services to Interact level and three services to Transact level in 2001. The Health Insurance Commission website www.hic.gov.au now provides secure transactions for citizens wishing to register as organ donors. The Australian Taxation Office www.ato.gov.au and Australia Post's www.postbillpay.com.au are leading the way with transactional services. Taxpayers can use the government's "e-tax" return facility to lodge their tax returns via the internet.

In other developments, the Federal Court of Australia offers e-filing options on the Court's website www.fedcourt.gov.au, while the Human Rights & Equal Opportunity Commission www.hreoc.gov.au provides online filing of equal employment opportunity complaints with electronic acknowledgements.

The Department of Immigration, Multicultural and Indigenous Affairs www.immi.gov.au sold 10,800 migration booklets to prospective migrants in the first nine months of their availability online, and is further examining the practicality of allowing visitors to Australia to obtain electronic travel authorities (ETAs) via the Internet, having delivered some 9 million ETAs online over the last five years.

Agencies in the Human Services, Education and Participation sectors will need to accelerate their efforts in moving beyond Publish level services if Australia is to improve on its position as a Visionary Challenger. Numerous federal government agency websites such as Centrelink www.centrelink.gov.au and Education Network Australia www.edna.gov.au still require manual intervention to complete transactions.

Although the Federal Government's Government Online vision, launched in April 2000, requires all departments and agencies to produce online action plans with a continuously updated timetable, the system is based on self-reporting to the central eGovernment agency, the National Office For the Information Economy (NOIE), rather than external benchmarking. While agencies reported that they expect just over half of current services to involve data interchange in the Online Survey Round 3 Results in March 2001, they expect just 5 percent of services to involve collecting and managing revenue and 7 percent to relate to procurement.

The lack of clearly articulated outcomes for service maturity, borne out by the findings of the research, will need to be addressed by the Government if Australia is to improve on its position and join the Innovative Leaders.

Last year Australia made its greatest strides in the CRM measure, increasing its overall score from 20 percent in 2001 to 44.6 percent, while increasing its ranking from 17 to 4. Australia's score of 50.3 percent on the CRM Depth measure was well above the global average of 36.1 percent. This reflects a healthy emphasis on the number of services that are designed around the needs of users.

The research identified a number of standout services, including the JobSearch website www.jobsearch.gov.au. The site is maintained by the Department of Employment and Workplace Relations and offers a broad range of employment-related services for job seekers, including resume writing and sending, and job matching. Other sites performing well in the research include the Department of Education Science and Training's portal, www.detya.gov.au, and the Australian Taxation Office website www.ato.gov.au.

The Department of Immigration, Multicultural and Indigenous Affairs website, www.immi.gov.au was the only service to rate on the CRM Insight measure. Offering tailored experiences for citizens and businesses based on previous visits presents an opportunity for Australian agencies to continue to develop the use of CRM techniques in the year ahead.

The new central government portal, www.australia.gov.au, which is organized around customer groups and aims to facilitate transactions across agencies, will also assist Australia in maintaining its momentum in customer relationship management.

With Australia moving to the top of the Visionary Challengers it has an opportunity to progress to the next stage of eGovernment leadership. Over the next 12 months Australia's Federal Government agencies face the challenge of continuing to drive their transactional processes online, building on the gains in customer relationship management, and introducing wireless services.

[1] Neilsen//Netratings, 15 August 2001

BELGIUM	
Overall Maturity	Emerging Performers
2002 Rank	16
2001 Rank	16
Vision Introduced	1999
Vision Title	Five Star Plan for the Information Society

Vision Summary
Government contact and information windows will be created at the local level in collaboration with the other levels of government. This system must be accessible to citizens and businesses for their dealings with government departments and agencies, with a digital window and digital spaces accessible to all.

Internet Penetration Rate 29 percent

Belgium_

Belgium maintained its place among the Emerging Performers with an overall ranking of 16, reflecting its steady progress in delivering more sophisticated services to citizens. This shows the Government's focus on implementing a management structure and integrated back-office function before introducing more comprehensive service offerings for citizens and businesses.

Created in May 2001, the Federal Public Agency for Information and Communications Technology (FEDICT) assumed responsibility for the development and implementation of a common eGovernment strategy under the *Copernicus Plan*. FEDICT is focused on ensuring integration between all levels of government in the regions, provinces and municipalities. The Federal Government of Prime Minister Guy Verhofstadt has charged the agency with the responsibility of realizing the government's vision announced in 1999.

The Agency has made it clear that the Government's first concern is to integrate back-office functions before moving forward on "shop fronts" for citizens and businesses although it expects the first "super portal" to be operational by 2002.

Belgium achieved a ranking of 16 on the Service Maturity Overall measure with its score of 36.7 percent, slipping from 13 the previous year. Although the Government recorded good gains in bringing services online - this score was 18.7 percent higher than last year - it was unable to maintain the pace of other similarly performing countries, in delivering more services at the Interact and Transact levels.

Of the 111 services for which the Government is responsible, 102 are available online to some degree, giving Belgium a Service Maturity Breadth of 91.9 percent. This exceeds the global average of 85.8 percent, and demonstrates Belgium's continuing progress in bringing government services online. In 2001 the Belgian Government succeeded in putting online to some degree 20 services that were not provided online last year, including a Transact level service that enables

corporations to pay their VAT online using the INTERVAT service at www.minfin.fgov.be.

Belgium's Service Maturity Depth score, indicating the sophistication of services delivered over the Internet, is 39.9 percent. Although falling below the global average of 45.9 percent, the result represents progress in delivering services that extend beyond the Publish level. The Government succeeded in moving seven existing services to Transact level, including allowing corporations to pay VAT using the INTERVAT service and two to Interact level in 2001, contributing to Belgium's service maturity performance. Among those promoted to Interact level was the capability to file a consumer complaint online. For example, citizens can now view monthly employment statistics on the Federal Ministry of Employment and Labor website www.meta.fgov.bepay, and can pay for their driving fines via electronic banking.

Belgium progressed in the areas of Revenue and some Postal services, where the Government is starting to deliver some transactional services to citizens. INTERVAT, described above, is one example while the Belgian Post Group has implemented a pilot project for Postbox, including secure email messaging and certification.

Belgium has implemented several initiatives in the social security arena. Employers in industries sensitive to 'moonlighting' - can enter declarations online or via a phone-banking type of application and can also consult declarations databases.

A Belgian smart card – the SIS card, was rolled out in 1998 with the aim of simplifying the administrative process and providing accurate data on social security status.

Citizens and businesses can make payments to the Central Government in Belgium via EDI or standard wire transfers, using Internet or PC banking.

Belgium improved its ranking from 17 to 12 on the CRM measure with a score of 30.3 percent, marginally above the global average. Belgium has made few gains in providing government services that are organized around the needs of citizens, although some progress has been made in the areas of interactivity and non-government value-added networks. Implementation of the first in a series of portal-based online services in 2002 should see further improvements in CRM, as well as in service maturity.

The Government has revamped its website www.fgov.be to be more user friendly and to enable greater accessibility. The site is an information portal rather than a delivery channel and does not yet deliver government services. The planned Federal portal should ensure that benefits to citizens are more tangible once the first phase of this ambitious project is completed.

For the first time, this year's research examined uGovernment, identifying the provision of government services via non-PC based electronic channels such as WAP phone, PDA or other mobile device. In this area no specific services have yet been implemented in Belgium.

The Government's modest gains in the key eGovernment metrics are consistent with its focus on integrating back-office systems before moving forward with online shopfronts for citizens and businesses. The challenge for Belgium over the coming year will be to ensure that the portals coming on-stream offer an appropriate range of mature services that are designed around the needs of citizens. This should see Belgium start to move up the ranks of the Emerging Performers to the next phase of its eGovernment development.

BRAZIL	
Overall Maturity	Platform Builders
2002 Rank	19
2001 Rank	18
Vision Introduced	1999
Vision Title	GovernmentNet

Vision Summary
To permit any citizen access to the new information technology, and be prepared to join a new dimension of the democracy.

Internet Penetration Rate 7 percent

Brazil_

Brazil has made moderate progress in delivering more sophisticated online government services in 2001 however has slipped marginally in the rankings from 18th to 19th place. Its relative position in eGovernment is the same given the addition of Denmark in 2002. In common with other Platform Builders, over the last 12 months Brazil has continued to focus its efforts on broader infrastructure concerns as well as in increasing citizens' and businesses' access to services.

In 1999 the Federal government defined the backbone program of the eGovernment vision called Information Society – described in the document Livro Verde (Green Book). Based on this document, key eGovernment initiatives included the current Brazil Government Portal (www.redegoverno.gov.br), Transparent Brazil (www.brasiltransparente.gov.br) and Br@zil.gov Network. These projects share common objectives and are aimed at improving public access to information technology. These initiatives are also an opportunity for the Government to promote reforms in public administration and increase transparency in government processes.

Brazil achieved a ranking of 19 on Service Maturity Overall, which comprises 70 percent of each country's score. Although it improved its score from the previous year by 10.4 percent, in relative terms it slipped from a ranking of 12 on this measure. Other countries performing at a similar level in the 2001 survey made greater progress in both bringing more services online and moving services up the maturity curve.

Of the 135 services the Brazilian Government could deliver online, 103 are available to some degree, giving a Service Maturity Breadth of 76.3 percent, below the global average of 85.8 percent. In 2001 the Brazilian Government introduced new online services, including the Federal Justice Board's website www.cjf.gov.br, connecting the citizens to federal courts websites where they can check information on trials or send their queries via email, and the Ministry of Justice website, www.mj.gov.br/dpdc/todeolho, where citizens can view information on consumer rights legislation.

Brazil's Service Maturity Depth score, which indicates the sophistication of services delivered,

is 37.8 percent. This represents a modest improvement of 8.1 percent on the previous year, indicating the majority of government services remain at the Publish level. However, the Brazilian Government has promoted some services from Publish to Interact level over the last year. Citizens can now apply for a welfare benefit, fulfilling a form and submitting it electronically. Teachers and institutions can access chat rooms of thematic meetings, participate in discussion groups, check event schedules, access a public list of emails and access a database with educational information. Citizens can also check traffic conditions and obtain specific answers for their intended journey on the National Department of Highways' website www.dner.gov.br.

Brazil has succeeded in expanding its range of Interact and Transact services. The Postal Service offers citizens free electronic mail on its website www.portaaberta.com.br, the Government's procurement service ComprasNet www.comprasnet.gov.br provides electronic registration for citizens and businesses seeking to participate in electronic auctions. The Ministry of Labor and Employment website www.mte.gov.br/menu/empregador/cnes/ provides electronic registration for labor unions.

Few services in the Human Services, Justice and Public Safety sectors have moved beyond the Publish Level. One initiative that could contribute to developing these services is the Rede Br@sil.gov project, a national, multi-service network integrating ministries and administrative agencies.

There is an opportunity for Brazil to revisit its Service Maturity priorities when the Executive Committee overseeing the eGovernment strategy meets in 2002 to evaluate progress over the last 2 years. The group, representing the majority of Government Ministries, identified in 2000 an ambitious initial program of 45 actions that would support the key eGovernment programs. To date the Brazilian government has not had a system of formal measures for assessing the progress of its eGovernment initiatives, but the Government has agreed with the World Bank to conduct research into the progress made.

Perhaps the boldest, although difficult to achieve, component of this plan is the goal of having all government services available on the Internet by the end of 2002. The PEPs (Electronic Points of Access) project, will allow free access to Internet public services through electronic terminals in public places.

The research showed that Brazil improved its rank on the CRM measure from 22 to 19, with a score of 17.7 percent. This improvement reflects the deployment of more sophisticated services that reflect the intentions of private and corporate citizens. The Government's procurement service, ComprasNet www.comprasnet.gov.br, also scored highly, for the registration of information on suppliers and businesses.

Several services across the Postal and Human Services sectors also performed quite well on the CRM measure. The Employment and Labor Ministry's website www.mtb.gov.br, enables citizens and businesses to register employment-related information, and the Welfare and Social Assistance Ministry's website www.mpas.gov.br allows the requisition of social benefits electronically.

While Brazil is steadily building its capability in delivering services that are interactive and designed around the intentions of users, it has some way to go in developing more customised offerings that respond to citizens' individual needs. Other slated niche government portal projects to help farmers and small business exporters may offer Brazil another opportunity to progress the delivery of services online. The first initiative in this area is the Portal do Exportador www.portaldoexportador.gov.br offering trade information and access to export related links. In addition, the Government has recognised the need for secure transactions and has accordingly legislated for PKI.

The Government's Rede Governo portal www.redegoverno.gov.br represents an excellent opportunity to deliver government services that respond to citizens' needs. Although the website offers over 800 online services, it is organised around the structure of ministries and services, rather than the lifestyle needs of Brazil's citizens.

For the first time, this year's research examined uGovernment, identifying the provision of government services via non-PC based electronic channels such as WAP phone, PDA or other mobile device. The ComprasNet www.comprasnet.gov.br site provides a service to subscribers whereby information on upcoming auctions is delivered to the subscriber's WAP phone.

Brazil's gains in delivering more citizen-centric and business-centric online services enabled it to maintain its position among the Platform Builders in this year's research, despite its fall in the rankings.

CANADA	
Overall Maturity	Innovative Leaders
2002 Rank	1
2001 Rank	1
Vision Introduced	1999
Vision Title	Government On-Line

Vision Summary
Our goal is to be known around the world as the government most connected to its citizens, with Canadians able to access all government information and services on-line at the time and place of their choosing

Internet Penetration Rate 58 percent

Canada_

Canada cemented its position as the eGovernment leader with an overall score of 59.9 percent, just ahead of close rival Singapore. To maintain its number one position, the Canadian Government displayed strong leadership, an unwavering focus on the critical elements of a whole-of-government approach and a commitment to innovation driven by citizens' and businesses' needs.

Canada's eGovernment initiatives focus on the importance of grouping online services around citizens' needs and priorities. Its *Government On-Line* program is centrally coordinated by the Treasury Board, under Minister Lucienne Robillard, yet is collaborative across agencies. The goal of *Government On-Line* is to provide Canadians with electronic access to all federal programs and services by 2005. The coordination of activities is the responsibility of the Government's Chief Information Officer (CIO), Michelle d'Auray.

Canada's online service delivery is based on extensive user research, which helps ensure that innovations reflect user needs. More than 50 focus groups in Canada and abroad supported the redesign of the Canada Site www.canada.gc.ca, which was launched in early 2001. The Canadian Government has launched an online citizens' panel to help Canada gain more insights into citizens' perceptions and expectations for G*overnment On-Line*, due to start in the first half of 2002.

The Canadian Government maintained its number 2 position on Service Maturity Overall measure by increasing its coverage of services and launching a number of online projects at the Transact level.

Of the 71 services in this research for which the Canadian Government is responsible, 64 are available online to some degree, giving a Service Maturity Breadth of 90.1 percent. In 2001 the Government introduced four new services online, reflecting its relatively high base of online services.

Canada's Service Maturity Depth score, which indicates the maturity of services delivered, is 65.7 percent. Although Canada's improvement across all levels was not as dramatic as that of Singapore, the Government developed four services from Publish to Transact level and two services from

Interact to Transact level in 2001. Citizens from areas including London, Ontario, Winnipeg, Manitoba, Gander, Newfoundland and Labrador and Sherbrooke, Quebec can now apply for employment insurance over the Internet. This is the first stage of the project under the auspices of Human Resources Development Canada www.drhc.gc.ca, with the balance to be delivered in Spring 2002. Another significant project is the testing of digital signature authentication, which will be tested and rolled out across a variety of Government services.

Among Canada's existing base of online government services, the research identified a number of services in the Revenue, Procurement and Postal sectors that achieved the maximum score for Transact level services.

As the eGovernment leader, Canada is pursuing whole-of-government strategies to ensure an integrated approach to the introduction of more mature services. In June 2001, the Government signed a contract to build the Secure Channel with a consortium of private sector companies. The Secure Channel will deliver the common infrastructure needed to assure secure, private and seamless transactions across government, and is the first of its kind to be built in the world.

The research showed that Canada maintained its dominance on the CRM measure, achieving number one position again with a score of 61.5 percent.

Of the 64 online services the Canadian Government delivered, 32 achieved the maximum CRM score. The key to Canada's success on the CRM measure is its dedication to deploying services that are informed by user research and attuned to user needs. Canada's performance will be further strengthened by its commitment to implementing common metrics that will enable whole-of-government comparisons in the use of clusters and gateways.

Canada's *Government On-Line* initiative has delivered a variety of leading edge services. One example is Industry Canada's Consumer Information Gateway www.consumerinformation.ca, which includes over 35 Federal Government departments and agencies, as well as over 250 provincial and territorial partners. These organizations have come together to promote Canadian consumer interests and awareness. Over the coming months, selected non-government organizations (NGOs) will join the initiative.

Also of note is the International or Non-Canadians Gateway, www.canadainternational.gc.ca that offers residents in other countries a wealth of information regarding Canada. It has grouped services and information into four subjects: Going to Canada, Doing Business with Canada, Canada and the World, and Arts and Culture. With approximately 20 percent of visits to federal web sites coming from outside the country, this gateway represents an important means of presenting Canada as an attractive country in which to live, visit, or do business.

The Canadian Government has redoubled its efforts to improve the central government portal, The Canada Site www.canada.gc.ca. The newly designed site was launched in early 2001 and now provides a single point of access for citizens, with information clustered around the three audience-based gateways of Canadians, Canadian Business and Non-Canadians. It provides access to 450 federal websites and offers email responses within one business day. Job Bank - www.jobbank.gc.ca - is the most popular part of the Canada site, receiving 48 percent of the site traffic with about 100,000 visits every day and more than 28 million user sessions a year. An electronic listing of work opportunities provided by employers from across Canada, the Job Bank has received as many as 18,000 hits a minute during peak periods. On average there are 46,000 jobs posted at any time, 2,000 new jobs posted every day, and approximately 47,000 online applications a day.

The Canadian Government is planning to relaunch the Business Gateway to align content from the websites of all provincial and territorial governments in Canada, making it a single portal for businesses across two tiers of government.

Canada's performance in this year's research, especially in delivering services that embody best practice customer relationship management, demonstrates what can be achieved when the principles of leadership and user-driven research inform the Government's actions. Canada plans to continue this commitment with the introduction of whole-of-government metrics, which will help identify gaps in service delivery to citizens and businesses across industry sectors.

DENMARK	
Overall Maturity	Visionary Challengers
2002 Rank	5
2001 Rank	-
Vision Introduced	1999
Vision Title	Digital Denmark

Vision Summary
By 2003, Danish public administration is to provide the best and most efficient public service in the Nordic countries with the help of digital administration; participation in democracy, open decision-making processes.

Internet Penetration Rate 46 percent

Denmark_

A new participant in this research, Denmark recorded strong results on the performance metrics to debut at third place among the Visionary Challengers and an overall fifth ranking.

The key to Denmark's achievement was its consistency across a broad range of measures, reflecting its strong commitment to whole-of-government planning and implementation.

Denmark maintained steady progress throughout the year under the auspices of the Digital Taskforce, the government body charged with the responsibility of realizing Denmark's vision of becoming a world leader in information technology over the next three years. The Taskforce, under Administrative Director Adam Wolf, works collaboratively with the IT Taskforce from the private sector to ensure effective monitoring of Denmark's progress internationally.

In collaboration with local government authorities the Digital Taskforce launched the Digital Administration project, focusing on the need for whole-of-government collaboration in the deployment of eGovernment initiatives. An early area of focus is the establishment of a procurement portal in collaboration with the private sector.

The Danish Government achieved a ranking of eight on the Service Maturity Overall measure with a score of 47 percent, a strong performance on both the Depth and Breadth measures.

Of the 136 services for which the Danish Government is responsible, 121 are available online to some degree, giving a Service Maturity Breadth of 89 percent. This exceeds the global average of 85.8 percent, indicating that Denmark is well advanced in bringing online government services.

Denmark's Service Maturity Depth score, indicating the sophistication of services delivered, is 52.9 percent. This exceeds the global average of 45.9 percent and reflects Denmark's progress in developing a range of services at the mature Interact and Transact levels.

Denmark's strengths are in delivering mature services in the Revenue and Postal sectors, a

hallmark of the more developed eGovernment countries. For example, Post Danmark's website www.stamps.postdanmark.dk enables citizens to establish a personal profile and buy stamps online using password access.

In the area of Regulation & Democracy, the Danish Commerce and Companies Agency's website www.stiftelser.webreg.dk allows companies to file for incorporation using a digital signature, while in the Education sector students can determine the status of their education loans via a personal identification number on the Bank of Denmark's website at www.finansstyrelsen.dk.

Retsinformation ("Legal Information") - www.retsinfo.dk - is the official online legal information system of Denmark and contains all Danish rules and regulations, i.e. all acts passed by the Folketing (the Danish parliament) as well as statutory orders, circulars issued, bills and other documents from the legislative process for example debates, parliamentary resolutions and proposals for parliamentary resolutions.

Denmark achieved a ranking of eight on the CRM measure with a score of 38.2 percent. This is above the global average of 30.3 percent, and demonstrates Denmark's progress in delivering services designed around the individual needs of citizens.

A number of standout sites across various industry sectors achieved the maximum CRM score. Examples include The Danish Ministry of Justice's website www.netborger.dk, where citizens can apply and pay for a passport, a service for purchasing copies of documents offered by the Danish State Information Service at www.danmark.dk and a service for citizens seeking to change their address at www.netborger.dk.

In addition to these services, there were numerous Government services that performed well on the CRM measure across the industry sectors. Denmark performed consistently across the CRM metrics, indicating the Government should be able to accelerate momentum over the coming year.

The Government's central portal www.danmark.dk is organized around government agencies rather than the needs of citizens. In May 2002, there are plans to launch an extensive site that will serve as the official Internet gateway to Denmark. Entirely in English, www.denmark.dk will also have several areas available in French, Spanish and German. This initiative offers the Government a great opportunity to move forward in applying CRM principles.

Other initiatives planned include The National Health Portal, which will gather all electronic communication between patients and the public health care system on one Internet site, The Danish Government Infostructurebase, which will contain all available, electronic public data and services, The Business Portal, an Internet based communications channel between the Government and various Private Companies, and project Digital Signature.

For the first time, this year's research examined uGovernment, identifying the provision of government services via non-PC based electronic channels such as WAP phone, PDA or other mobile device. The research did not identify a specific commitment from the Danish Government to wireless service offerings. However, the Danish State Railways offers a train schedule service at www.dsb.dk, where citizens can determine the status of their train service via WAP phone.

Denmark's performance on a broad range of eGovernment measures confirms its place as a strong contender to move up the ranks of Visionary Challengers. Its collaborative approach to planning and implementation augurs well for Denmark's progress in the coming year.

FINLAND	
Overall Maturity	Visionary Challengers
2002 Rank	7
2001 Rank	6
Vision Introduced	1998
Vision Title	Quality of Life, Knowledge and Competitiveness

Vision Summary
A society which develops and utilizes the opportunities inherent in the information society to improve the quality of life, knowledge, international competitiveness and interaction in an exemplary, versatile and sustainable way

Internet Penetration Rate 56 percent

Finland_

Finland turned in a solid performance in this year's research to maintain a high-ranking position among the Visionary Challengers, although it narrowly ceded its overall sixth ranking to the United Kingdom, which outperformed it on the CRM measure.

Unlike many other eGovernment leaders in the study, Finland does not have a clearly articulated vision for eGovernment, or a coordinated leadership structure to drive the delivery of integrated online government services. Although the Information Society Advisory Board is responsible for promoting eGovernment, Ministries independently implement their own Information Society programs. The Ministry of Finance steers and coordinates Information Management and the use of Information and Communications Technology in government.

However, the Government has turned its attention to the issue of whole of government planning by creating a task force charged with the goal of delivering a government-wide action plan. Recommendations arising from the plan were presented in early 2002 and address a wide selection of issues ranging from service accessibility and reassessment of recognition technologies to coordination and governance structures. Moreover, it suggests the Ministry of Finance, working jointly with the Information Society Advisory Board, should take a stronger steering and coordination role.

The task force will build on innovative initiatives such as the Business Information System (BIS), a new cooperative service for enterprises and communities that transact with the Finnish Trade Register, Foundations Register or Tax Administration. The system enables businesses to report their company information in one single notice to both authorities. The new service - www.ytj.fi - makes it easy for business partners and consumers to check the addresses of enterprises, and whether they have been registered.

Finland achieved a ranking of seven on the Service Maturity Overall measure, maintaining its position from the previous year. Of the 130 services in this research for which the Finnish Government is

responsible, 115 are available online to some degree, giving a Service Maturity Breadth of 88.5 percent, which exceeds the global average of 85.8 percent. In 2001, the Government succeeded in putting online to some degree 16 new services. For example, citizens can now pay their income taxes to the Finnish Tax Administration www.vero.fi by creating a form on the Tax Administration's website and using their bank to transact payment.

Finland's Service Maturity Depth score, which measures the maturity of services delivered online, is 53.6 percent. This is well clear of the global average of 45.9 percent, and demonstrates that Finland has further developed its strong base of mature services at Transact and Interact levels. The Finnish Government promoted four services to Transact level and 15 to Interact in 2001. For example, businesses that are registered customers of Finnish Customs can pay their import/export levies via the Customs website www.tulli.fi and their banking service, while citizens seeking employment can submit their CV online to the Ministry's CV "bank" www.asiointi.mol.fi, which is used to identify potential employees.

Finland offers strong transactional capability in the Revenue, Transport & Motor Vehicles and Postal sectors with an online payment system via private banks. Businesses seeking to transact with the Government enjoy end-to-end transactional functionality on the Hansel website www.hansel.fi, a state owned company that provides outsourced acquisition services to government departments.

The National Land Survey of Finland - www.nls.fi/jako/norm/www-palvelu.html provides information on and services in real estate, topography and the environment, and is responsible for Finland's cadastral system and general mapping assignments. It promotes the shared use of geographic information through its web-enabled services.

Finland maintained its ranking of nine on the CRM measure with a score of 35.4 percent, which exceeds the global average of 30.3 percent. Consistent with leading Visionary Challengers, Finland has a variety of sites that achieved high CRM rankings, although just two services, both on Finland Post's website www.netposti.fi achieved a maximum score. These services involve citizens using a password and identification to set up an account with the postal service and sending electronic mail.

Finland has a golden opportunity to improve its performance on the customer relationship management measure with the planned relaunch of the central government portal, the Citizen's Handbook www.opas.vn.fi. The goal of the new portal is to make public administration more transparent and enhance interactive services for citizens. The project is scheduled to go live in 2002.

For the first time, this year's research examined uGovernment, identifying the provision of government services via non-PC based electronic channels such as WAP phone, PDA or other mobile device.

With its strong penetration in mobile services, it is not surprising that Finland is the leading performer on the uGovernment measure. The research identified a number of services whereby citizens can utilize the country's online banking system to pay taxes and charges via a mobile device. Indeed, the seamless integration of mobile communications with the private sector online banking system in Finland proved to be unique in the research. In the Education sector, institutions such as the University of Technology in Tampere offer a service for students to enrol in their examinations via mobile phone.

Finland has unique strengths on which to build its eGovernment service offerings to citizens and businesses. Its seamless integration of online and mobile services with the banking system is unmatched by other countries in the survey.

FRANCE	
Overall Maturity	Visionary Challengers
2002 Rank	12
2001 Rank	12
Vision Introduced	1998
Vision Title	Electronic Administration

Vision Summary
To develop the content of government sites and facilitate access to them in a coordinated manner, to develop public online services that citizens and businesses want, to increase access to government services and bridge the computer literacy gap, and to develop online citizenship.

Internet Penetration Rate 20 percent

France_

France's ranking of 12th has seen it join the Visionary Challengers.

The key challenge now for France is to consolidate its eGovernment leadership structure and clarify its objectives going forward.

With the Government's action program for the information society in place since 1998, France has enjoyed a stable period in which to advance its eGovernment vision, *Administration électronique*. The Government has addressed the need for whole-of-government planning by appointing a cross-ministry committee, the Committee for Government Reform. This group has defined five objectives for moving forward, which essentially focus on the proliferation of secure online services for citizens along with reform of the Government's administrative processes. The co-ordination of the implementation of eGovernment vision is the responsibility of the Minister for the Public Service and Government Reform, Michel Sapin. The Committee meets regularly to review progress against plan and publishes the outcomes of its reviews.

France achieved a ranking of 12 on the Service Maturity Overall measure with its score of 43.5 percent, with a sizeable jump of 23.9 percent since last year. This is a result of significantly increased coverage of Publish level services, along with one new Transact level service, all of which contributed to its competitive international positioning in service maturity.

Of the 161 services in this research for which the French Government is responsible, 155 are available online to some degree, giving a Service Maturity Breadth of 96.3 percent, the third highest score in the study behind the United States and Singapore. This reflects the Government's success over the last year in putting online to some degree 45 new services. Transact level services among these new offerings include the Ministère des Finances website www.finances.gouv.fr, where corporate and private citizens can pay their taxes, and the ANPE website www.anpe.fr, where businesses can register job vacancies.

France's Service Maturity Depth score, which indicates the maturity of services delivered, is 45.2 percent. This is marginally below the global average of 45.9 percent, but nevertheless represents an improved effort on the previous year, though not at the same pace as some other countries. The French Government moved one service from Publish level to Transact level and another three services from Publish to Interact in 2001. Transact level services among these new offerings include the Ministere des Finances website www.finances.gouv.fr, where corporate and private citizens can pay their taxes, and the ANPE website www.anpe.fr, where businesses can register job vacancies.

The research identified two services where citizens can access a seamless secure transaction from one website, resulting in a maximum score. These services are offered at www.recensement.insee.fr, where citizens can download and pay for census information from INSEE, France's census agency, and at www.infogreffe.fr, where the Registre du Commerce offers a new service enabling businesses to pay for company information. Other Transact services such as registration for online services on La Poste's website www.laposte.fr, require manual intervention.

In the Revenue sector, a new service has been developed which enables taxpayers to view their accounts and file online. It features a Public Key Infrastructure (PKI) that delivers free digital certificates online for authentication and digital signature. France's 32 million taxpayers now have their personal tax file data accessible online. This service represents a step forward in the deployment of a new generation of large-scale e-government services in France. As it was opened to the public on March 11th, 2002 it could therefore not be assessed in this year's study. It is one of the first important steps of a larger program called "Copernic", the strategic goal of which is to offer to all taxpayers the possibility to manage online their relationship with the Tax Administration (personalized services, online filing, online payment, access to their account, tracking the progress of their requests, etc.) through a multi-channel and multi-services strategy.

If France is to maintain its position among the Visionary Challengers, it will need to extend the functionality of its current Transact level services and continue to develop Transact and Interact services.

France slipped marginally in its ranking on the CRM measure from 9 to 10 with a score of 32.1 percent, just above the global average of 30.3 percent. The Ministère des Finances' website www.impot.gouv.fr performed well on the metrics that address interactivity, insight into users' individual needs and organization around the intents of citizens.

More broadly, the research showed that although French agencies performed well on the CRM metrics that concern interactivity and organization around users' needs, there are opportunities for further development in the areas of insights into individual citizens' needs and non-government value-added networks.

France's Central Government portal www.service-public.fr provides a sound platform for moving forward in the delivery of services that are based around citizens' needs. The portal is organized around themes such as "Family" and "Insurance" that reflect the intentions of citizens.

The French Government recently launched its "grand projet" to e-enable the administration by the year 2005. As Michel Sapin described it at the November 2001 European Commission eGovernment conference in Brussels, the French Government wishes to greatly increase the number of services available, while personalizing citizens' interaction with government online. The minister further stipulated that continuity across the back office is required to provide quality customer-focused services. He advocated a multi-channel approach - referring to 'solidarity across the various channels' between citizen and government, and between business and government.

France now has an opportunity to move to the next stage of its eGovernment vision with the introduction of more mature services that reflect the needs of citizens. With many Government services available online at the Publish level, the onus is on the French Government to deliver its promised reforms of government processes and increased access for citizens. With a Presidential election due in 2002, there will be an additional challenge for France in rolling out these initiatives consistently.

GERMANY	
Overall Maturity	Visionary Challengers
2002 Rank	9
2001 Rank	15
Vision Introduced	2000
Vision Title	BundOnline 2005

Vision Summary
To ensure that citizen and industry are able to use the services of the Federal administration more simply, faster and cheaper.

Internet Penetration Rate 25 percent

Germany_

Germany significantly improved its overall ranking from 15th in the 2001 report to 9th this year, and was placed sixth among the Visionary Challengers. Its improved performance reflects a greater emphasis on bringing Government services online and further development of its strong base of mature services in the Revenue and Postal sectors.

Following Chancellor Gerhard Schroeder's unveiling of Germany's eGovernment vision, *BundOnline 2005* in September 2000, the Government has implemented a range of measures to accelerate the implementation of its vision. The German Government's focus is on the modernization of federal administrative structures that will deliver speedy, service-oriented, approachable and cheaper electronic administration by the year 2005.

The Government identified 18 pilot projects over to lead its early efforts in delivering online services to citizens and businesses. They include the repayment of student loans, electronic tax declarations, and the processing of customs matters. The public procurement project, Öffentlicher Eink@uf Online, is intended to combine the authorities' entire contract award process, from defining their requirements to delivering products.

The German Government achieved a ranking of four on the Service Maturity Overall measure, which represents a dramatic improvement on its ranking of 16 the previous year. Germany recorded the highest growth on this measure over the last year, jumping 37.5 percent since the 2001 survey.

Of the 79 services for which the German Government is responsible, 72 are available online to some degree, giving a Service Maturity Breadth of 91.1 percent. This exceeds the global average of 85.8 percent and demonstrates the Government's commitment to bringing all internet-capable Federal administration services online by 2005. The German Government introduced 10 new online services in 2001, of which two were introduced at the Transact level. For example, citizens can now set up an online account and order postal products from the Deutsche Post AG website www.postbank.de. Both these services achieved the maximum score for Transact level services,

indicating end-to-end transactional capability from a single website. Businesses can also pay their import/export levies at www.zoll-d.de, although this service did not achieve the maximum score.

Germany's Service Maturity Depth score is 58.3 percent. This exceeds the global average of 45.9 percent and, like the Breadth measure, represents a significant improvement. The German Government succeeded in moving two existing services to the Transact level and two to the Interact level over the last year. For example, businesses can now complete part of their transaction online at the Statistisches Bundesamt website www.destatis.de when they download census information. Citizens can pay their income taxes to the Bundesfinanzmisterium website www.elsterformular.de. In another pilot initiative, Bafög - www.bva.bund.de - enables citizens to view the status of student loans.

The research showed that Germany slipped in its ranking from 9 to 20 on the CRM measure with a score of 16.2 percent. Consistent with other countries among the Visionary Challengers, Germany's focus has been on achieving greater coverage of online services and introducing mature services in sectors that deliver early gains.

Germany's privatized postal service, Deutsche Post AG - www.dpag.de - provides two services that achieved a maximum score in the research. Other services in the Postal and Revenue sectors also rated highly, indicating they are designed around the intentions of the corporate and private citizen, rather than the government department or agency.

Although Germany has not improved its performance on the CRM research metrics, in evolving its eGovernment strategy it is becoming increasingly concerned with issues of customer relationship management. In her opening lecture at the annual conference of the International Council for Information Technology in Government Administration on 23 October 2001, Brigitte Zypries, State Secretary of the Federal Ministry of the Interior, said: "If we take the opportunities offered by eGovernment, we will create a new service culture."

The central government portal www.bund.de provides another opportunity for Germany to lift its performance in CRM. Although the first stage of the portal, launched in March 2001, is not organized around user intentions, the second stage, started in mid-2001, will be organized around the needs of citizens and businesses.

By building on its strengths in service maturity and addressing eGovernment leadership, Germany has succeeded in moving forward on the key fronts of improved service delivery while implementing an appropriate management structure that should enable it to move up the ranks of the Visionary Challengers. The key to Germany's success in the coming year is implementation of its action plan, which must address not only the volume of online services, but also the quality of services that reflect best practice in customer relationship management.

HONG KONG	
Overall Maturity	Visionary Challengers
2002 Rank	8
2001 Rank	10
Vision Introduced	1998, Revised in 2001
Vision Title	2001 Digital 21 Strategy

Vision Summary
To drive Hong Kong's development as a leading digital city in the globally connected world.

Internet Penetration Rate 39 percent

Hong Kong_

Hong Kong recorded steady progress in 2001, moving to fifth position among the Visionary Challengers. Hong Kong lifted its overall ranking from 10 to 8 with an improved Service Maturity score.

Progress has been spearheaded by the Government's revision of its Digital 21 Strategy in May 2001, which updated eGovernment targets. The Government's goal is to increase public services with an e-option in Hong Kong to 90 percent under the Electronic Service Delivery (ESD) website www.esd.gov.hk and other government websites by the end of 2003.

The Government also established eGovernment Coordination Office under the auspices of the Information Technology and Broadcasting Bureau. Its charter is "to initiate necessary cultural changes within the Government for championing the eGovernment agenda, coordinate different agencies and explore innovative implementation models for eGovernment projects".

Hong Kong achieved a ranking of five on the overall Service Maturity measure, a significant increase on its ranking of 11 the previous year. This reflects the Government's steady progress in delivering more mature services online.

Of the 138 services that the Hong Kong Government could deliver online, 127 are available to some degree, giving a Service Maturity Breadth of 92 percent, above the global average of 85.8 percent. Of these, a total of 33 new services were introduced in 2001. For example, various government departments now enable citizens to change their address online.

Hong Kong's Service Maturity Depth score is 56.2 percent. This represents an improvement of 27 percent over the previous year. The Government introduced six services to Interact level and four services to Transact level in 2001. For example, citizens can now order postal products in the Hong Kong Post shopping mall and businesses can purchase census information at www.esd.gov.hk. A number of Government services received a maximum ranking for the delivery of Transact level services, including declaring goods for import/export, electronic mail, government

procurement along with various other services for citizens, such as online payment of parking tickets, fines for driving offences and purchase of government publications and documents.

The research identified a variety of innovative partnerships between Government and the private sector which have accelerated the delivery of mature services to citizens and businesses alike, and contributed to the significantly improved Service Maturity Depth score. They include the purchase of lottery tickets in the government-licensed national lottery from facilities provided by the Hong Kong Jockey Club at www.hkjockeyclub.com, or the partnership with ESD Services Limited to provide the central e-government service portal http://www.esd.gov.hk/.

The Government plans to roll out a variety of consumer services during 2002 including the booking of sports and leisure facilities, registration for more public examinations and additional interactive search functions for census data and online checking of bankruptcy records. The Government will also continue to actively drive e-procurement initiatives, including development of an electronic marketplace for government purchases and setting a target to carry out 80 percent of government procurement tenders electronically by the end of 2003.

With a CRM measure of 23.7 percent, Hong Kong fell below the global average of 30.3 percent, but is making some headway on this measure. The Trade and Industry Department's Business Information Service at http://www.licence.tid.gov.hk achieved a perfect CRM score with its tailored business licence information search capability. Other services that performed well on the CRM measure included the downloading of legislative proposals and applications for birth certificates, both on the ESDlife website www.esd.gov.hk.

The ESDlife website, which offers government and private sector services is based around life events, from having a baby through to retirement. By October 2001 the site had attracted 18 million visitors and over 950,000 transactions, with the most popular services including job search, payment of bills, tourist information and volunteer registrations.

The planned revamp of the Government Information Centre (GIC) website into a one-stop-shop portal that offers user-friendly access to government information and services is another indication of Hong Kong's commitment to increasing the sophistication of tailored services for citizens and businesses.

For the first time, this year's research examined uGovernment, identifying the provision of government services via non-PC based electronic channels such as WAP phone, PDA or other mobile device. Unlike the majority of countries, who did not deliver any uGovernment services, Hong Kong offered lottery tickets for purchase by mobile phone.

Hong Kong's *2001 Digital 21 Strategy* refers explicitly to the Government's commitment to deliver public services to businesses and the community on an "anywhere anytime" basis. The Information Technology and Broadcasting Bureau plans to introduce services through the mobile medium in addition to personal computers and public kiosks in the coming year.

The Government is actively seeking the support of the private sector in mobilizing its eGovernment strategy and will continue to outsource government projects to foster a strong IT industry and speed up implementation. The Government set its target of outsourcing two-thirds of new government IT projects and is now outsourcing over 80 percent of these projects.

Hong Kong has turned around its progress from a relatively slow year in 2000 with the revamped *2001 Digital 21 Strategy*, a strengthening of Transact level service offerings, and the development of a select number of intentions based portals.

IRELAND	
Overall Maturity	Visionary Challengers
2002 Rank	10
2001 Rank	13
Vision Introduced	2000
Vision Title	Public Services Broker

Vision Summary
To provide online access to fully integrated customer focused public services.

Internet Penetration Rate 31 percent

Ireland_

In taking its place among the ranks of the Visionary Challengers, Ireland has improved from 13th to 10th place in the overall rankings.

Since announcing Ireland's eGovernment vision in September 2000, Taoiseach Bertie Ahern has announced a further initiative, stressing the importance of citizens, by stating: "When it comes to electronic Government, our aim is . . . to put people first, instead of the supplier of the service, and to integrate services to make things as easy as possible for the people who need them." The eGovernment vision is to create a public services broker that will function as an electronic one-stop-shop where the public can access and apply for a wide range of state services and benefits.

The formation of the Reach Agency in September 2000 was a key milestone in achieving the goal of fully integrated delivery of public services. The Agency, a cross-departmental team of civil servants, carries the responsibility of delivering the infrastructure to make *Public Services Broker* a reality, and is directed by Oliver Ryan.

The Information Society Commission, which reports directly to the Taoiseach, has benchmarking as one of its main areas of activity. It will compare Ireland's performance against other countries and seek to identify best practices that meet Ireland's requirements. It has also adopted the external benchmarks of the European Union (under the eEurope 2002 Action Plan), which publishes an annual Benchmarking Report to record progress in all European Union states. In November 2001, the inaugural EU Benchmarking Report put Ireland at the top of the EU in eGovernment.

In February 2002, the Reach Agency announced its intention to proceed to implementation of harnessing technologies to e-enable government processes. This augurs well for Ireland's ambitious goal of providing access to the full range of electronic public services in a variety of ways, 24 hours a day, 7 days a week. Indeed, the Public Services Broker is on schedule to launch facilities, in late March 2002, for registration and authentication to receive services, for applying online for government services, and for access to comprehensive information organized on a

life-episode and business-episode basis. This new suite of facilities aims to meet Ireland's objective of integrating service delivery at a single point of access.

The Irish Government achieved a ranking of 14 on Service Maturity overall, with a score of 39.3 percent, representing a strong 26.4 percent improvement on last year's effort.

Of the 120 services for which the Irish Government is responsible, 107 are available online to some degree, giving a Service Maturity Breadth of 89.2 percent. Marginally above the global average of 85.8 percent, Ireland's result reflects gains made in the coverage of its online services to citizens and businesses. The Irish Government introduced a total of 33 new online services in 2001. For example, businesses can now apply for an environmental assistance grant from the Department of Environment & Local Government via the BASIS (Business Access to State Information and Services) website www.basis.ie, which offers a single point of access to all government information and services, including links to all state funding and grants.

Ireland's Service Maturity Depth score is 44.1 percent. Whilst below the global average of 45.9 percent, Ireland has succeeded in closing the gap with other countries on the Service Maturity measure. The Government promoted five existing services to Transact level and 11 to Interact level in 2001. For example, businesses can pay their import/export duties online to the Office of the Revenue Commissioners www.revenue.ie via Icarus-ecom, the service provider that links the trade with the Revenue's Automated Processing System.

Safemail, www.post.trust.ie, is another example of a new mature offering from Post Trust, a subsidiary of An Post, which enables citizens to send electronic mail. Although the service did not achieve the maximum score for a Transact level service, it is illustrative of a healthy level of activity in more mature government online services. Further progress should be expected over the coming years in the area of Human Services, where the Government has plans to revolutionize the health service. Regional health boards, such as the Southern Health Board www.shb.ie, have already taken the lead in putting services online and national government plans to do the same.

Unlike many other Visionary Challengers, which have concentrated their service maturity efforts in the core sectors of Revenue, Regulation & Democracy and Postal, Ireland is broadening the base of its mature service offerings. Ireland's approach is somewhat different to others in that it is aiming for a high degree of integration on the delivery side initially, on the basis that people look for services, not organizations. This goal will impact on the ability to achieve quick wins on single services.

Ireland improved from fourth to second in its CRM ranking with a score of 46.8 percent. Exceeding the global average of 30.3 percent, this score represents a solid improvement.

Only one government service, the FAS - Training and Employment Authority's website www.fas.ie, which enables citizens to submit resumes online, achieved the maximum CRM score. However, numerous services scored well, indicating a solid base on which Ireland can build its customer relationship management offerings in the year ahead.

A similar employment service for public sector jobs – www.publicjobs.gov.ie – went live in February 2002 and is the responsibility of the Civil Service Commission/Local Appointments Commission.

The Government performed well on the CRM metrics that concerned interactivity, organisation around users' needs and the provision of non-government value-added networks.

Ireland's central government portal www.irlgov.ie provides a sound platform for the continuing sophistication of government services online, with its organization around life events for citizens via Oasis www.oasis.gov.ie and for businesses via BASIS www.basis.ie. The procurement portal www.e-tenders.gov.ie is another area of opportunity for the Government, which has plans in place to develop a more comprehensive life-cycle system. The Government has also recently completed an eProcurement strategy, which will be piloted shortly at a local Government level.

Ireland has made sound progress on the key metrics and is well placed to move up the ranks of the Visionary Challengers.

ITALY	
Overall Maturity	Platform Builders
2002 Rank	21
2001 Rank	21
Vision Introduced	2000
Vision Title	eGovernment Action Plan

Vision Summary
To create a structure whereby citizens can receive services, by any front office regardless of territorial jurisdiction; citizens will not need to supply any information already in possession of other State administrations; services are citizen-centred; citizens need notify the administration once only.

Internet Penetration Rate 21 percent

Italy_

In spite of strong gains in service maturity in 2001, in the 2002 Report Italy has remained at the lower end of the Platform Builders, achieving an overall 21st position once again.

Following the general election in May 2001, Italy has made slow progress with its eGovernment vision, with improvements in service maturity. In common with other Platform Builders, a major area of focus for Italy is establishing the infrastructure and a citizen-focused civil service organization before moving to the next phase of more sophisticated online government services.

Italy's vision stresses the need for continuing organizational reforms to public administration, and a desire to adopt a "horizontal, service-oriented administration with intensive information exchange among all its parts and with the outside". Appropriate utilization of new information technologies is regarded as central to the reform of government. The Minister for Innovation and Technology - Lucio Stanca - is responsible for implementing Italy's eGovernment vision.

The Government's action plan envisages the delivery of seamless services to citizens from any front office administration authorized to perform the service regardless of territorial jurisdiction or residence, in which citizens notify the administration once only at the time any event occurs, while the administration itself will file the information and retrieve it as required in the future. Key areas of focus in the action plan for achieving the vision include information and services portals, a nationwide network, new integrated systems for registry offices and local administration, a new electronic identity card and digital signature authentication. Local government will play a vital role in achieving this ambitious plan.

Of the 118 services in this research for which the Italian Government is responsible, 80 are available online to some degree, giving a Service Maturity Breadth of 67.8 percent. This falls below the global average of 85.8 percent, but demonstrates that the Government has brought considerably more of its services online. In 2001 the Government

introduced 31 new services online, the second largest increase in new services in the research. Of these services, four were introduced at the Transact level. For example, businesses can now pay their income and sales taxes to the Ministry of Finance: Revenue Agency via its website www.agenziaentrate.it. Both these services achieved the maximum score for Transact level services, indicating end-to-end transactional capability from a single website. Citizens can also purchase collectors' stamps online via the Italian Post Company's website www.filatelia.poste.it.

Italy's Service Maturity Depth score is 34.1 percent. Although this is well below the global average of 45.9 percent, it shows that Italy is starting to close the gap on other countries. Over the last year, Italy improved by 23.5 percent on this measure, well above the average rise of 14.6 percent. The Italian Government promoted two existing services to Transact level in 2001. For example, citizens can now pay some of their utility bills and send electronic mail including online telegrams, online letters and postcards, purchase electronic stamps and bank post services via the Italian Post Company website - www.poste.it.

Although Italy's performance in Service Maturity is hindered by most services remaining at the Publish level, the research identified several services under development that could provide the basis for further improvements over the coming year. One example is the Home Office's website www.interno.it, which tested an electronic voting system for a referendum in the city of Avellino in October 2001. Also, the Italian Post Company is testing new services for changing postal addresses.

The Government has moved forward in offering services that are fully transactional in the Revenue sector, and plans are clearly under way that should yield further gains in the Postal sector.

Italy's CRM score was 15.6 percent, just over half the global average of 30.3 percent. Of all the services that were evaluated, the Italian Post Company's utility bill payment service www.poste.it proved the best example of a service incorporating CRM techniques. While the service did not achieve the maximum score, it rated on all but one metric, Customer Offerings, which evaluates the extent to which the service helps or advises citizens according to their needs. Apart from a handful of services, which scored reasonably well on the CRM measure, the Government offers very few services that embody the principles of customer relationship management.

The Government's central portal www.governo.it functions as a gateway to government services and is focused on government agencies rather than the intentions of citizens. However an Italian private company has launched a new and more citizen-focused portal www.apertoalpubblico.it, which is structured around citizens' needs. Users are redirected to the websites of the local government or agency that deals with the matter.

The Government's action plan calls for the continuous development of information and services portals, which will provide an opportunity for Italy to accelerate the delivery of more sophisticated service offerings.

The Italian government faces a number of key hurdles in the development of its vision, primarily the coordination between central and local government administration. However, there are some promising projects in the pipeline, and an opportunity to deliver on key projects that will progress the vision for more integrated electronic government focused on citizens' needs.

JAPAN	
Overall Maturity	Emerging Performers
2002 Rank	17
2001 Rank	17
Vision Introduced	1999
Vision Title	Millennium Project

Vision Summary
Through our national strategy, we hope to create a "knowledge-emergent society" that fosters diverse creativity through the exchange of knowledge among citizens.

Internet Penetration Rate 31 percent

Japan_

Japan maintained its overall ranking of 17 in 2002, among the Emerging Performers. Japan's result reflects modest improvements to the Government's delivery of online services.

Following the election of Prime Minister Koizumi, the Government remains committed to the original eGovernment vision set out in the *Millennium Project* in 1999. The *eJapan Strategy* of January 2001 lays out a blueprint for making Japan the world's most advanced IT nation within five years. Consistent with other Emerging Performers, Japan is focused on building the appropriate infrastructure and regulatory systems to support its eGovernment plans. Japan's plan is extremely ambitious and far-reaching. Priorities include building an ultra high-speed internet infrastructure, providing continuous internet access, establishing rules on electronic commerce, digitizing education, raising the e-literacy of the general public, enhancing high-quality content, promoting eGovernment at national and local level, and playing a more international role within Asia in promoting the IT revolution.

The Japanese Government achieved a ranking of 17 on the overall Service Maturity measure, slipping from 14 in 2001.

Of the 126 services that the Japanese Government could deliver online, 113 are available to some degree, giving a Service Maturity Breadth of 89.7 percent. This is above the global average of 85.8 percent, and represents an improvement on the previous year. The Government introduced nine new online services in 2001. For example, businesses can now view open bids for government services on the central government website www.jetro.go.jp, and citizens can view information on organ donors via a link from the Ministry Of Health, Labor and Welfare website to the private sector service www.jotnw.or.jp.

While Japan scored strongly on the Service Delivery Breadth measure, its Depth measure, which shows the maturity of services delivered, is 37.4 percent. This is below the global average of 45.9 percent. The research found that the majority of government services have not yet progressed beyond the Publish stage. Exceptions to

this are tax returns, postal services, distance learning, defense job applications and business information services, which enable citizens and businesses to interact or transact online with government. There are encouraging signs in the growth in Service Maturity Depth over the last year of 18.4 percent, higher than the average increase of 14.6 percent.

The research identified a number of services that are setting the standard in online transactions. The Ministry of Land, Infrastructure and Transport provides an email-based claims service at www.mlit.go.jp, enabling citizens to submit claims relating to national roads. The service achieved the maximum score for a Transact level service. Other services that attracted high scores at the Transact level were the Postal Administration's electronic mail and content verification services at www1.hybridmail.go.jp and the Ministry of Health, Labour and Welfare's job registration service for companies at www.hellowork.go.jp.

The need to accelerate Japan's progress in eGovernment is well understood by the Government, with measures and goals outlined in the eJapan *Priority Policy Program*. This program confirms the key role of the private sector in driving information technology, with the Government continuing to play an active role in regulation, research and development.

The Government plans to submit a bill in 2002 to the Diet to move all Government paperwork online by fiscal 2003 requiring government departments to explain progress by exception. The Government also plans to accept electronic bids on public works projects and to receive income tax payments online within the same timeframe.

Japan has made minimal progress in offering services that are organized around the needs of the citizen. Japan's CRM score of 22 percent is below the global average of 30.3 percent, highlighting the need for the Government to redouble its efforts to move to the next stage of delivering services that are organized around the needs of users.

However, a select number of Government agencies are delivering services at a more sophisticated level. The Ministry of Trade, Economy and Industry at www.hkd.meti.go.jp provides a tailored online service enabling business users to download business start-up information. This service scored 4 out of a possible 5 in the CRM component of the research. An interactive land title search service is offered by the Ministry of Land, Infrastructure and Transport at www.ochi.mlit.go.jp, while the Ministry of Justice provides a bill searching facility at www.moj.go.jp.

The eJapan Priority Policy Program calls for a "user-friendly e-commerce market" and "efficient and consumer-friendly eGovernment", and the Government's focus is on developing regulatory measures to enhance and protect the users of eGovernment services.

Japan has made a modest start in delivering wireless online government services. To date, the Government has introduced services on traffic accidents, traffic fines and postage that citizens can access via cellular phone services. Given Japan's high penetration of cellular phones, and its world leading position in the delivery of WAP services via NTT DoCoMo, there is a real opportunity for Japan to make strides as an eGovernment innovator in the year ahead.

The Government remains committed to regular reviews and clear timetables for implementation. Once the planned legislation for eGovernment is passed by the Diet, Japan faces the important task of delivering on its ambitious promises of moving all government paperwork online by fiscal year 2003.

MALAYSIA	
Overall Maturity	Platform Builders
2002 Rank	20
2001 Rank	19
Vision Introduced	1997
Vison Title	Electronic Government

Vision Summary
For government, businesses and citizenry working together for the benefit of Malaysia and all of its citizens.

Internet Penetration Rate 8 percent

Malaysia_

Malaysia maintained its position amongst the Platform Builders in 2002, but fell one place from 19 to 20 in this year's report.

In 2001, Malaysia remained focused on bringing more government services online and progressing the implementation of pilot projects as part of its *Electronic Government* initiative of the *Vision 2020* policy, announced in 1997 as part of the *Multimedia Super Corridor* vision.

The Government's Shared Services Outfit project is focused on establishing a common and integrated IT infrastructure with consistent quality. This project's major objective is to provide support for electronic government projects, including the Human Resource Management Information System, Generic Office Environment, Electronic Labour Exchange and Project Monitoring System II. It will also support Putrajaya Campus Network users, consisting of 41 agencies and 12,500 users, with the number of users increasing to approximately 42,000 by January 2004.

Of the 140 services that the Malaysian Government could deliver online, 103 are available to some degree, giving a Service Maturity Breadth of 73.6 percent. Although below the global average of 85.8 percent, it represents a significant improvement in government services online. In 2001 Malaysia introduced a total of 29 new services, reflecting the Government's commitment to making information more accessible to citizens. For example, citizens can now apply for funding and view information on educational standards on the Ministry of Education's website www.moe.gov.my, and can apply for birth, marriage and death certificates or request copies from the Registration Department of Malaysia's website http://www.jpn.gov.my/.

Malaysia's Service Maturity Depth measure, indicating the maturity of services delivered, is 33.8 percent. This is an improvement on the previous year's achievement. However, the majority of government services remain at the Publish level. Consistent with the Government's stated intention in *Electronic Government*, Malaysia has acted on its promise of adopting a new approach with the private sector by

partnering with world-class companies to develop and implement leading-edge applications.

One such example is www.rilek.com.my, a multi-purpose website designed to enable citizens to pay their utility bills online, with public kiosks available for citizens without access to a computer. Plans are underway to expand access to other government services.

Another website scoring a maximum score on the Service Maturity Depth measure is the portal www.myeg.com.my, designed around citizens' intentions, giving them access to information on Government services, including online registration of drivers licences and vehicle registrations, and payment of utility bills.

Another example is the Government's eServices pilot project. The aim of the project is to offer alternative methods of accessing information on Government services and pay bills. The public's response to the eServices pilot introduced in July 2001 has been modest, with several thousand citizens accessing the inquiry-related services, representing a small number of transactions recorded in the first three months of service.

Malaysia also progressed in other areas of Service Maturity, such as digital certification for businesses seeking to transact online, offered by the private sector provider, Digicert.

In order to improve on its position as a mid-ranking Platform Builder, Malaysia will need to move a greater volume of services online and improve the maturity of those that are currently at the Publish level to offer interactive or transactional capability.

Malaysia achieved a CRM score of 19.5 percent compared with the global average of 30.3 percent. Malaysia slipped 9 places on the CRM measure from the previous year. Malaysia's performance on the CRM measure is an indicative of its progress in delivering more sophisticated services being limited to the eServices and Electronic Procurement pilot programs, which both scored well on the CRM criteria.

For the first time, this year's research examined uGovernment, identifying the provision of government services via non-PC based electronic channels such as WAP phone, PDA or other mobile device.

While the research did not identify any services delivered via higher-order electronic channels in Malaysia, such as WAP phone, PDA or other mobile device, the Government has clearly stated its commitment to offering citizens a wide variety of access devices such as kiosks and interactive TV. Given Malaysia's readiness to embrace alternative delivery channels and to partner with the private sector, there is an opportunity to make gains in this area over the next 12 months.

Malaysia has succeeded in delivering on the key pilot projects in its eServices and Electronic Procurement initiatives. The achievements of the last 12 months provide a sound base on which to further progress implementation of Malaysia's *Electronic Government* strategy.

MEXICO	
Overall Maturity	Platform Builders
2002 Rank	23
2001 Rank	22
Vision Introduced	2001
Vision Title	e-Mexico (National "e"/technology vision)

Vision Summary
The vision is focussed on three key elements - content, connectivity and services, the services encompassing health, education, science and technology, government and trade.

Internet Penetration Rate 4 percent

Mexico_

Mexico succeeded in making significant gains in delivering more services online over the last year. However Mexico was unable to improve on its position among the Platform Builders in this year's research. The fall from 22nd to 23rd reflects the addition of Denmark to the research.

In August 2001 the Mexican Government of President Vicente Fox formally launched *e-Mexico*, its vision to bring eGovernment services to the citizens of Mexico. *e-Mexico's* focus is on three core areas of content, connectivity and services, and is the responsibility of the Communications and Transport Secretariat.

At this early stage of Mexico's eGovernment development, the focus has been on articulating goals and establishing alliances with the private sector to build the country's infrastructure, a necessary step toward providing mature, integrated online services.

Key to the Government's vision is the development of a government portal to provide citizens with access to services in health, education, science and technology, government and trade.

Of the 126 services for which the federal government is responsible, 68 are available online to some degree, giving a Service Maturity Breadth of 54 percent. Although this falls below the global average of 85.8 percent, it does represent a significant improvement on Mexico's performance on the previous year, with an increase of 17.9 percent, demonstrating the Government is accelerating its efforts to bring more services online.

In 2001 20 new online services were introduced. Businesses can now pay their sales tax online via www.sat.gob.mx, although they must physically go to the tax agency to validate their identity. Citizens can find information on how to change their address and where to vote on the Federal Electoral Institute website www.ife.org.mx.

Mexico's Service Maturity Depth score, which indicates the maturity of services delivered, is 26.1 percent, an improvement on its score last year of 13.6 percent. Mexico introduced one interact level service during the year - the Secretariat of Interior's website www.gobernacion.gob.mx

introduced a service offering citizens a chat room on policy issues where Federal government officials periodically take part.

Mexico received a score of 8.9 percent on the CRM measure. Although it was not able to maintain progress in customer relationship management at the same pace as other countries, Mexico has established a base of services that are organized around the intentions of users on which to build over the coming year. An example of a service that performed well on this measure is the taxation office website, www.sat.gob.mx, which provides taxation-related services for businesses. Although the agency requires businesses to validate their payments in person, the site performed well on CRM measures and provides a valuable case study for future initiatives.

Mexico does not have a central government portal; however, its Precisa web page www.precisa.gob.mx provides links to all the secretariats, agencies and news sites. The Government's plans for introducing a central government portal will be a crucial step in furthering its efforts to deliver services that are designed around the needs of citizens.

Implementing a whole of government program organized around the needs of citizens and businesses is a major undertaking. As Julio Cesar Margain expressed it, the Mexican Government is taking a "first step on this ambitious trail". However, as other countries have shown, it is possible to accelerate performance on key eGovernment metrics with a clear vision and strong leadership.

"eMexico's focus is on three core areas - content, connectivity and services"

THE NETHERLANDS	
Overall Maturity	Visionary Challengers
2002 Rank	11
2001 Rank	7
Vision Introduced	2000
Vision Title	Contract With The Future

Vision Summary
To encourage the use of information and communication technology in a number of areas to create a more efficient and effective government.

Internet Penetration Rate 45 percent

Netherlands_

The Netherlands slipped from seventh to 11th position in the overall rankings, notwithstanding an improved performance in customer relationship management and a rise in overall maturity score.

In moving forward with its eGovernment program, the Dutch Government has adopted a consensus-based approach, rather than a clearly defined leadership structure, to drive its eGovernment programs. The generally accepted vision statement is *Contract With The Future*, released in May 2000.

The Netherlands' eGovernment vision is accompanied by a vision to stimulate Information and Communication Technology (ICT) in Dutch Society, called *Digital Delta*, sponsored by a group of government ministers. The two vision statements define required action in the Netherlands in the related areas of eGovernment and Information and Communications Technology (ICT) *Contract With The Future* concentrates on the key themes of freedom of choice and participation opportunities for citizens accessing online government services. *Digital Delta* focuses on the regulatory, knowledge, skills and infrastructure requirements for a leading ICT economy.

A key goal of the Government's action plan is to have 25 percent of the Government's services delivered electronically by the end of 2002. Progress on the eGovernment action plan is reported internally whereas the Digital Delta action plan involves a formal external benchmarking program against selected countries internationally.

The Dutch Government achieved a ranking of 11th on the Service Maturity Overall measure with its score of 44.2 percent, slipping 5 places from its performance in 2001.

Of the 122 services for which the Dutch Government is responsible, 114 are available online to some degree, giving a Service Maturity Breadth of 93.4 percent. This is above the global average of 85.8 percent, and is indicative of the Government's continuing efforts to develop online services, however is concentrated at the publish end of the maturity curve.

The Netherlands' Service Maturity Depth score, is 47.3 percent. This exceeds the global average of 45.9 percent and reflects a gain of 8.1 percent on the previous year's score, but was below the average increase of 14.6 percent. The Dutch Government succeeded in moving six services from Publish to Interact in 2001, and moved one service from Publish to Transact. Newly developed Interact services include the National Ombudsman's website www.nationaleombudsman.nl, which enables citizens and businesses to electronically file a claim against insurance companies. Citizens can also file general complaints about poor service on this website.

The research identified service maturity strengths in the Postal sector, consistent with many countries that have more developed eGovernment programs. For example, the partly privatized Postal Services www.ptt-post.nl enables citizens to change their postal address online.

Unlike many other countries with developed eGovernment programs, the Netherlands has not progressed beyond Interact level services in the Revenue sector. One example of an Interact level service is the education portal www.kennisnet.nl, which provides a gateway to other education sites.

Apart from its gains in the Postal sector and small selection of services in other sectors, the Netherlands has a very limited range of services at the Transact level.

The Netherlands significantly improved its ranking from 17 to 11 on the CRM measure with a score of 31.6 percent. This exceeds the global average of 30.3 percent and reflects a strong base of sites that performed well on the customer relationship management metrics. However, there were no services in the research that achieved a maximum score.

Overall, the Netherlands performed well on the CRM metrics that measured interactivity and organisation around the needs of users. However, there are opportunities for improvement in the other CRM metrics of responding to the individual needs of citizens and providing value-added non-government networks.

The government portal in the Netherlands- www.overheid.nl is organized around user intentions and provides gateways for the three key groups of citizens, businesses and civil servants. An interesting feature is its ability to customize information for citizens by zip code so that relevant information by region is displayed upon request.

The Netherlands has a strong base of online government services on which to build its eGovernment program, and will benefit from increasing the maturity level of these services as well as to further developing its capabilities in customer relationship management. In a region where other countries are accelerating the pace of eGovernment innovation with streamlined and strong eGovernment leadership structures and clearly defined action plans that help drive service delivery, the Netherlands would be well served integrate the features into its program.

NEW ZEALAND	
Overall Maturity	Emerging Performers
2002 Rank	14
2001 Rank	9
Vision Introduced	2001
Vision Title	government.nz@your.service

Vision Summary
To create an environment where others – the private sector, communities and individuals – can make the most of e-technology; and capitalize on e-technology to improve the way government serves New Zealanders

Internet Penetration Rate 40 percent

New Zealand_

New Zealand maintained its number one position among the Emerging Performers but fell in ranking from nine to 14. The New Zealand Government's attention has been focused on fleshing out the eGovernment strategy.

A number of foundation projects have been announced but have not yet resulted in an increase in the delivery of mature online services.

The Prime Minister, Helen Clark, announced the new eGovernment vision government.nz@your.service on 26 April 2001. The strategy outlines specific deliverables and milestones that will be reviewed and updated every 6 months. It starts by building the foundations for government in areas such as inter-operability, security and authentication, and follows by addressing the needs of citizens via e-services.

Of the 140 services that the New Zealand Government could deliver online, 121 are available to some degree, giving a Service Maturity Breadth of 86.4 percent. This is consistent with the global average and is an improvement on the previous year's score, indicating the Government has continued its efforts in putting a greater volume of government services online. In 2001 the Government introduced 18 new online services, including a Transact level service on New Zealand Post Limited's website www.secure.nzpost.co.nz, enabling citizens to order postal products.

New Zealand's Service Maturity Depth score, is 44 percent, marginally below the global average of 45.9 percent. New Zealand has lost ground as other countries have focused on increasing maturity. Other countries in the research that performed at a similar level on the Service Maturity measure in 2001 maintained or improved their relative positions on this measure. The Government developed a total of nine services from Publish to Interact level in 2001, which contributed to New Zealand's performance in service maturity. For example, citizens can now email their inquiries to the New Zealand Parliament website www.executive.govt.nz.

New Zealand has made little progress in implementing mature services in the Revenue

sector, where delivery remains at the Publish level. The number of agencies delivering more sophisticated services at the Transact level remain very limited.

The eGovernment strategy calls for agencies to begin implementing e-services from July 2002. The Government has set some aggressive implementation milestones with the announcement of 16 eGovernment projects, to lay the groundwork for eGovernment leadership. These include the launch of a revamped government portal, an e-billing pilot program to test the benefits of citizens being able to pay their bills online, and a series of planning, infrastructure and inter-operability projects.

These projects will impact on citizens in a number of ways - through electronic registration of information with the Government at a time and place that suits them, financial dealings, a single repository for government forms and an opportunity to provide feedback on proposals and policies.

New Zealand's CRM score of 40.1 percent was above the global average of 30.3 percent, although its ranking on this measure fell from 4 to 6. The research showed that although many services are interactive and designed around the needs of citizens, few responded to the needs of the visitor on an individual basis. Services offering these facilities included online submissions of job applications on the New Zealand Army website www.defence.govt.nz and a course information service provided on the Ministry of Education's website www.minedu.govt.nz.

Of the 115 online services provided by the Government online the research did not identify any service that achieved a maximum possible score on the CRM measure. Although there is a solid group of Government services that deliver a reasonable level of sophistication in responding to the needs of users, there are few if any services that are approaching best in class.

Given the timetable outlined for 2002, in which the majority of eGovernment projects concern broader planning and infrastructure, it would be a reasonable expectation that New Zealand may not keep up with the rate of change in the delivery of mature online services by other countries. The test for New Zealand agencies will be the extent to which they can fast track implementation of projects in the latter half of 2002, while ensuring they meet best practice requirements. In this way, New Zealand can live up to its stated vision, of becoming a world leader in e-government.

NORWAY	
Overall Maturity	Visionary Challengers
2002 Rank	13
2001 Rank	4
Vision Introduced	2000
Vision Title	eNorway

Vision Summary
A green knowledge economy and an information society for all.

Internet Penetration Rate 57 percent

Norway_

Norway performed strongly in establishing its place as a leading contender in service maturity, but slipped in the rankings, falling from fourth to thirteenth place. While this fall may at first seem quite sharp, it is important to note that the difference in overall score between Australia in fourth place at the top of the Visionary Challengers and Norway is just under 5 percent.

The Minister of Trade and Industry, Ansgar Gabrielsen, is now responsible for eNorway, the goals of which are access to new technology for all citizens, increased knowledge among citizens so they can use Information and Communications Technology as a tool according to their own needs and desires, and increased confidence among citizens in a secure Information and Communications Technology environment.

The 24/7 Public Administration strategy, which falls under the responsibility of the Minister of Labor and Government Administration, Victor Norman, is a key component of eNorway. The current strategy document for 24/7 Public Administration, released in August 2001, sets an ambitious goal for the Norwegian Government, stating "by 2004, users will be able to access all public information and most public services via the internet, and possibly also by other electronic channels such as tone telephones. Public information and services will be assembled in one place and will be easily accessible. It will be easy for users to find their way to the services they are looking for. The system will provide general and subject-based public portals. Users will be able to use customized Internet search engines to search all public information."

Norway has a clear leadership structure in place to drive eNorway forward, through a separate state secretary committee. In addition, the Government's eEnvoy submits regular status reports to the Prime Minister, and an inter-ministerial group of officials also meets once a month to monitor progress. The Government has chosen international benchmarking as the method for comparing results and, although not a member of the EU, is included in EU benchmarking as outlined in the eEurope plan.

The Norwegian Government achieved a ranking of sixth on the Service Maturity measure with its score of 48.1 percent. Of the 108 services for which the Norwegian Government is responsible, 100 are available online to some degree, giving a Service Maturity Breadth of 92.6 percent, well above the global average of 85.8 percent.

The Norwegian Government introduced seven new online services over the past year that were not observed during last year's survey, including the Directorate of Customs and Excise website www.toll.no, which provides application forms for customs exemptions, and the Governmental Office of Youth and Adoption website www.suak.no, which offers citizens an information service on various aspects of adoption.

Norway's Service Maturity Depth score is 52 percent. The result is well above the global average of 45.9 percent and indicates that Norway is making sound progress in delivering ever more mature services. The Government succeeded in moving two existing services to Transact level and 11 existing services to Interact level in 2001. For example, in the Education sector, the State Education Loan Fund website www.lanekassen.no now offers application forms for student loans and scholarships. A smart card-based solution for submitting applications has been piloted. The State Education Loan Fund is now working on a PIN code-based solution to be implemented later this year.

The research identified six sites in the Postal and Revenue sectors that achieved the maximum score at the Transact level, demonstrating Norway's great strength in these areas. For example, at the Norway Post website www.posten.no, citizens can set up an account for sending and receiving secure emails, and can also decide what kind of advertising they would like to receive. The Norwegian Revenue Service www.skatteetaten.no, provides a complete suite of services for citizens to pay their income, property or sales taxes via their online bank or post office.

While Norway has strengthened its range of Interact level services in the Education sector, there is potential for it to further develop these services.

Among the initiatives showing substantial potential is the Police Directorate's establishment of a portal (version one due in autumn 2002), and a B2B eCommerce marketplace serving state and municipal agencies.

Norway slipped in its ranking from 9 to 17 on the CRM measure with a score of 21.2 percent, below the average of 30.3 percent. Norway's performance on the CRM metrics was patchy, with no single service standing out from the rest. Norway's performance on the CRM measures that evaluate interactivity and organization around users' needs was good. However, there are considerable opportunities available for improvement, especially in relation to responding to the individual needs of citizens and providing value-added non-government networks.

As a Visionary Challenger, Norway's customer relationship management is the weak link in the Government's overall offering. To this end, it may be appropriate for the Government to bring forward its review of the central government portal www.norge.no. Central government authorities and the board of the Norwegian Association of Local and Regional Authorities established the portal to provide a common access point to all Norwegian public sector information. Its key objectives are to simplify access to public services and to encourage public sector organizations to put their services online via the central gateway.

To date, Norway has concentrated its efforts on service maturity, and as the fourth ranking country on this measure, has clearly done an excellent job. However, with other leading Visionary Challengers making impressive progress on the dual fronts of service maturity and customer relationship management, Norway needs to focus its attention on CRM, while identifying opportunities to more fully develop selected Interact and Transact level services.

PORTUGAL	
Overall Maturity	Platform Builders
2002 Rank	18
2001 Rank	14
Vision Introduced	1996
Vision Title	The Internet Initiative

Vision Summary
The development of an information society to encourage greater democracy through citizenship, knowledge, liberty and innovation

Internet Penetration Rate 8 percent

Portugal_

Portugal fell four places in this year's rankings from 14th to 18th and is in the Platform Builders category.

Like other Platform Builders, Portugal is continuing to expand its efforts in delivering more mature services online, but remains focused on building appropriate infrastructure and regulatory systems to support eGovernment.

Portugal first embarked on developing government policy for the information society in 1996, and has continually refined its policies and strategies over the ensuing years. Portugal's vision for eGovernment is set out in The Green Book for an Information Society in Portugal, and is known as the Open State. A key focus of the vision is the development of an information society to encourage greater democracy through citizenship, knowledge and innovation.

The related program of action, Open State: Modernizing Public Administration, served as the foundation for the Internet Initiative, which the Portuguese Government announced in July 2000. The Internet Initiative sets out a number of ambitious objectives, for example, all government forms are to be published online by 2002 with submission functionality by the end of 2003. The ultimate goal is for all public services to be online by 2005. The eGovernment plan is integrated annually into the Government's national ministerial planning process.

Portugal's governance structure involves two key ministries: the Ministry of Science and Technology, responsible for the development of the Information Society in general, and the Ministry of Reform of State and Public Administration, responsible for the reform of public administration, and is closely aligned with the information society. The Ministry coordinates major initiatives such as the Public Administration Portal, the Direct Public Service (Serviço Público Directo) and the recently created Institute for Innovation in Public Administration (IIAE). One of IIAE's roles is to identify the required competencies and responsibilities for eGovernment across government agencies.

Portugal's path forward will be assisted by its decision to align its program of action with the

eEurope Action Plan 2002 International Benchmarking System, which will involve progress reviews twice yearly. This benchmarking effort will be supported by the internal reviews of the Inter-Ministry Commission for the Information Society (CISI). CISI is also undertaking periodic assessments of the quality of public administration websites by using the services of an independent organization.

Portugal achieved a ranking of 19th on the Service Maturity Overall measure with its score of 25.2 percent. Although Portugal slipped 4 places on the measure, it made improvements to the coverage and quality of its services, improving by 9.4 percent on last year's performance.

Of the 162 services in this research for which the Portuguese Government is responsible, 131 are available online to some degree, giving a Service Maturity Breadth of 80.9 percent. Although this falls below the global average of 85.8 percent, Portugal has made solid gains in putting more government services online. In 2001 the Government introduced 24 new services online. For example, citizens can now make a claim to the Social Security Department via its website www.seg-social.pt, and they can file a complaint on the Ministério da Justiça website www.mj.gov.pt.

Portugal's Service Maturity Depth score is 31.2 percent against the global average of 45.9 percent. This is an increase of 6.6 percent on Portugal's 2001 score, indicating the modest gains made in efforts to deliver services online.

In line with many other countries in this research, to date Portugal's strengths lie in the Revenue and Postal sectors, with a number of sites delivering services at Transact level. For example, citizens can send electronic mail on the postal service CTT Correios website www.telepost.ctt.pt, and businesses can submit their income and VAT forms on the Taxation Department website www.dgci.mailcom.pt.

There are a number of encouraging projects in the pipeline, for example, the employment agency Instituto do Emprego e Formação Profissional website www.iefp.pt, plans to introduce a range of employment related services for citizens such as job search and eLearning applications.

Portugal slipped from 9 to 13 in its ranking on the CRM measure with a score of 27.3 percent. While none of the Government's online services achieved a maximum score, Portugal has a solid base of services that are designed around the intentions of citizens, especially in the Regulation sector. For example, the registry agency Direcção Geral dos Registos e do Notariado website www.certidoes.mailcom.pt achieved a score of 4 out of a possible 5 for its service, which enables citizens to request a copy of a birth or death certificate online.

This Government's central portal www.infocid.pt represents another area of opportunity for Portugal to accelerate its efforts in delivering more sophisticated online services to citizens. Currently, the portal is organized around higher order subjects. Although relevant to citizens, the organization of the site does not address the most common user intentions, such as finding the closest hospital or paying a parking ticket, and remains focused on government agency structures.

Portugal can build on its hard-won gains in eGovernment and reinvigorate its efforts in the delivery of more sophisticated services to citizens that embody the ideals set out in its eGovernment vision. Portugal's strengths are its sound action planning and benchmarking processes and its core of online services that performed well on the key metrics.

SINGAPORE	
Overall Maturity	Innovative Leaders
2002 Rank	2
2001 Rank	2
Vision Introduced	2001
Vison Title	e-Government Action Plan
Vision Summary	To be a leading eGovernment to better serve the nation in the digital economy
Internet Penetration Rate	47 percent

Singapore_

Singapore achieved significant gains in the delivery of mature services to maintain its number two overall ranking among the Innovative Leaders. Placed behind Canada, Singapore has narrowed the gap between the two countries' overall scores from 3 percent in 2001 to just less than 1 percent in 2002.

Following the head of the civil service, Lim Siong Guan's call to action, "Every service that can be delivered electronically shall be electronically available", Singapore has expanded the range of interactive and transactional services available across a variety of government sectors.

A high-level government management committee is driving the eGovernment vision. A strategic framework that aligns the three components of Government and Citizens, Government and Business, and Government and Employees underpins the Government action plan.

Further evidence of the Government's willingness to facilitate eGovernment can be found in its approach to secure transactions. Singapore took the lead in 1998 as one of the first countries to enact an Electronic Transactions Act (ETA) to provide for legal recognition of electronic signatures through the use of digital certificates. To ensure that Singapore continues to compete effectively as an eCommerce hub, the Government plans to conduct a review of the ETA to incorporate the latest global legal developments.

In moving its eGovernment program forward, Singapore remains focused on the strategic pillars that stress the importance of constantly reinventing government, delivering integrated services centred on users' needs, developing a "sense and respond" approach, using Infocomm Technology (ICT) to achieve quantum leaps in service delivery and innovating with ICT by embracing enterprise and experimentation.

Singapore achieved the number one position on the overall Service Maturity level, demonstrating superior performance in delivering mature online services.

Of the 136 services that the Singapore Government could deliver online, 132 are available to some

degree, giving a Service Maturity Breadth of 97.1 percent. This is an outstanding result that underscores the Government's commitment to online service delivery. In 2001 the Government introduced nine new services. For example, citizens can now renew their driver's license on the eCitizen website www.ecitizen.gov.sg.

Singapore made considerable progress in the delivery of integrated services with the launch of the eCitizen Centre www.ecitizen.gov.sg, a single window to public services organized around citizen intentions. Services are organized according to what the private or corporate citizen intends to do rather than by department and agency.

Singapore achieved its greatest gains on the Service Maturity Depth measure, with a score of 69.1 percent. The Government developed seven services from Publish to Transact level and 12 services from Interact to Transact level in 2001. For example, businesses can now pay their income and sales taxes to the Inland Revenue Authority of Singapore via internet banking services provided by private banks, and citizens can apply for state-funded grants from The Enterprise Challenge on the government website www.gov.sg.

Singapore achieved maximum scores for Transact level services across a range of services, including taxation payments, payment of utility bills, purchase of postal products, registration of job vacancies, enrolments and payments for university courses, business requests for information and online payments to charities, to name a few.

One of the Action Plan's five strategic pillars is to be proactive and responsive by adopting a "sense and respond" approach. However, Singapore did not perform as strongly on the CRM measure, achieving a score of 39.7 percent, which although exceeding the global average of 30.3 percent, resulted in Singapore slipping in the CRM measure from two to seven.

While citizen-focused sites such as www.onemotoring.com in the Transport and Motor Vehicles sector scored well on the CRM criteria many other services in the Human Services, Justice and Public Safety, Education, Regulation, Participation and Postal sectors have not embraced CRM techniques as wholeheartedly. Singapore's services performed best on the Organization Performance (intentions based) metric, but lagged most on the interactivity measure.

The standout site on the CRM measure was the Ministry of Manpower's website www.employmenttown.gov.sg, which achieved maximum scores for its resume submission and job searching services. An initiative of the eCitizen project, the site provides a gateway to a variety of labor market information and services in Singapore.

For the first time, this year's research examined uGovernment, identifying the provision of government services via wireless channels such as WAP phone, PDA or other mobile device. Singapore's eGovernment action plan stresses the importance of technology innovation and multiple channels of delivery. One example identified in the research is the Supreme Court of Singapore's SMS service, which enables citizens to view the time and date of trials.

As a global leader in eGovernment services, Singapore did not disappoint in this year's research results, achieving the leading performance on the Service Maturity measure. However, Singapore does face challenges in lifting its performance on the CRM measure. If Singapore can accelerate its achievements on the same scale as for Service Maturity Depth this year, it may succeed in moving beyond the number two spot it has occupied for the last three years.

SOUTH AFRICA	
Overall Maturity	Platform Builders
2002 Rank	22
2001 Rank	20
Vision Introduced	2000
Vision Title	Electronic Government – The Digital Future: A Public Service IT Policy Framework (discussion document)

Vision Summary
To leverage e-Government to structure and render services around life episodes of the South African people, following a series of events, from cradle to grave. Such services must be accessible to all citizens anytime, anywhere, and through different access devices and media.

Internet Penetration Rate 5 percent

South Africa_

South Africa's score of 15 percent enabled it to achieve an overall 22nd position, remaining among the Platform Builders category.

In common with other Platform Builders, South Africa's focus has been on developing the appropriate infrastructure and regulatory framework to support its eGovernment initiatives. The Government has also invested in building consensus among stakeholders with the aim of formulating a broad, inclusive policy framework for the adoption of eGovernment strategies.

South Africa does not have a clear vision statement for its eGovernment program, but draws on the vision component of the Green Paper on Electronic Commerce, which sets out a blueprint for eGovernment in South Africa.

More recently, the Department of Public Service and Administration released *Electronic Government - The Digital Future: A Public Service IT Policy Framework - February 2001*, a result of the lengthy consultative process with various stakeholders. Rather than providing a definitive action plan, this document serves as a guide to further discussions and inputs into the continuing process of consultation.

The key player in South Africa's eGovernment leadership is Bheki Zungu, Government Chief Information Officer of the Department of Public Service & Administration. Also influential in progressing the eGovernment program is Andile Ngcaba, Director-General of the Department of Communications. This department deals with policy formulation for its portfolio organizations, and focuses on the rollout of communications infrastructure, especially to disadvantaged communities.

The South African Government achieved a ranking of 22 on the Service Maturity measure with a score of 16 percent. Although slipping marginally, South Africa improved the coverage and sophistication of its online services by 8.7 percent on last year.

Of the 130 services in this research for which the South African Government is responsible, 82 are available online to some degree, giving a Service

Maturity Breadth of 63.1 percent. This falls well below the global average of 85.8 percent, but nevertheless represents progress for South Africa in putting more government services online - its score has risen by 19.3 percent since last year. In 2001 the Government succeeded in putting online, to some degree, 21 new services including two initiatives on the Department of Transport website www.transport.gov.za, where citizens can now view information on local train schedules and road construction projects. Citizens can also view a report on general education standards on the Department of Education website www.education.pwv.gov.za.

South Africa's Service Maturity Depth score, which indicates the maturity of services delivered over the Internet, is 25.4 percent. Again, this indicates some improvement in delivering services that reflect the intentions of private and corporate citizens. The South African Government promoted three services to Transact level and two services to Interact level in 2001 that had previously been at Publish level. For example, businesses, provisional taxpayers and accounting firms can now file various statutory tax returns electronically with the South African Revenue Service (SARS) via one of the five authorized web based services. Online tax payments for citizens are in the pipeline.

The research confirmed that, like other developing eGovernment countries, South Africa has targeted the Revenue sector as a starting point for developing mature online services. MyTax.co.za – www.mytax.co.za – provides an interesting example of collaboration between the public and private sectors. In addition to the electronic filing mentioned earlier, the service also allows users to view correspondence with SARS, to view full payment and forms submission history, to avail of help facilities and online guides, to receive reminders, to utilize end-to-end forms and payment tracking, and to receive electronic confirmation of all transactions.

There is also a nucleus of mature services in the Education sector via the University of South Africa website www.unisa.ac.za, which provides a variety of online services for students, including online enrolments and payments of fees.

South Africa achieved a CRM score of 12.8 percent. Although the Government did not show much progress in CRM, there is a sound base of services in the Revenue sector that scored reasonably well, indicating they are beginning to apply CRM principles to online service delivery.

The South African Government website - www.polity.org.za - provides information on topics such as bills and acts, constitutional matters, green papers, notices, regulations and legislation. A brief explanation of the South African legislative process is also provided.

Overall, the research showed that while South Africa performed well on the interactivity measure, there is work to do in providing insights into citizens' needs and non-government value-added networks.

There is an opportunity for the Government to improve its performance in customer relationship management by developing the central government website www.gov.za, which is organized around government agency rather than user intentions. Development of the website into a citizen-focused portal, preferably in manageable steps, could serve as a useful catalyst for the delivery of more sophisticated online government services to citizens.

South Africa has devoted considerable resources to ensuring a broad base of support among stakeholders for its eGovernment plan and has initiated some innovative partnerships with the private sector, but is now faced with the challenge of moving the program forward in clear, achievable steps.

SPAIN	
Overall Maturity	Emerging Performers
2002 Rank	15
2001 Rank	11
Vision Introduced	1999
Vision Title	Info XXI: the Information Society for All

Vision Summary
To provide an Information Society for all, providing education and employment, appropriate infrastructures and legal framework, a Society which promotes its culture, a Society with better quality of life, an innovative Society which stimulates the growth of new businesses and new industries, to promote a Society with presence in the global marketplace, to provide an Administration more transparent and centred around the citizen

Internet Penetration Rate 21 percent

Spain_

Spain slipped three places to achieve an overall 15th position, whilst maintaining its membership in the Emerging Performers category.

Although the Spanish Government succeeded in delivering more mature online services to citizens, it was not able to keep pace with other countries that recorded stronger progress on at least one of the key measures.

The genesis of Spain's eGovernment vision was the creation of the Inter-Ministerial Commission for the Information Society and New Technologies, an agency formed in April 1999 to establish the Government's vision for eGovernment, *Info XXI: the Information Society for All*. The scope of the vision is broad, concentrating on the economic benefits of the information society for Spain in a competitive global market.

The strategic objectives of the vision encompass social and economic aims as well as the more traditional eGovernment objectives of appropriate regulatory systems and infrastructure, and improved transparency in government services organized around the needs of citizen. There is also a focus on leveraging the resources of the private sector, which has resulted in progress in areas such as digital certification and electronic identity cards. Baudilio Tomé Muguruza, Secretary of State for Telecommunications and the Information Society in the Ministry of Science and Technology, is the key individual responsible for implementing Spain's eGovernment vision.

Spain achieved a ranking of 13th on the Service Maturity Overall measure with a score of 42 percent, which represents a marked improvement of 27.6 percent on the previous year, well above the average rise of 17.7 percent. In moving up four places on the measure, Spain has concentrated its efforts on increasing both the coverage and sophistication of its online government services.

Of the 118 services in this research for which the Spanish Government is responsible, 104 are available online to some degree, giving a Service Maturity Breadth of 88.1 percent. This exceeds the global average of 85.8 percent, demonstrating that since last year, Spain has accelerated its efforts on

this measure when compared with other countries. In 2001 the Government succeeded in putting online, to some degree, 28 new services. These include a service to enable businesses to find information about incorporating a company on the General Directorate for Trade and Investment (Ministry of Economy) website www.investinspain.org. The service provides links to web pages of agencies responsible for the different procedures required. Citizens can also change their registered voting address on the Instituto Nacional de Estadística website www.censos2001.es. This service achieved the maximum score for a Transact level service.

Spain's Service Maturity Depth score, which indicates the complexity of services delivered, is 47.6 percent. Again, this exceeds the global average of 45.9 percent, and reflects Spain's progress in delivering mature services, especially in the Revenue and Regulation & Democracy sectors.

The research identified a number of services in these sectors that achieved the maximum score at Transact level, for example, the taxation office Agencia Estatal de Administración Tributaria website www.aeat.es, enables citizens and businesses to pay their taxes online using a secure digital signature. Citizens can also pay for company information with their credit card on the Registro Mercantil website www.registradores.org.

Other eGovernment initiatives include the Ministerio del Interior website www.mir.es, which enables citizens to search for their voting area before an election, and the Dirección General de Policía's online service www.policia.es, where citizens can check the status of matters they have reported in person at their local police station.

Many of the Government's online services remain at the Publish level, indicating significant opportunities to add value to citizens' online interactions.

Spain slipped from 4th to 15th in its ranking on the CRM measure with a score of 22.9 percent - below the global average of 30.3 percent. In spite of Spain's declining performance on the CRM measure, the research identified a core of services in the Revenue and Human Services sectors that performed reasonably well on the key CRM metrics and should form the basis for improvement in the year ahead.

Overall, Spain performed well on the CRM metrics that concern interactivity and organization around users' needs. The central government portal www.administracion.es, organizes information around the three key groups of citizens, enterprises and employees. The portal provides access to a broad range of government information and services, including payment of taxes and submission of census information. However, most of the online services involve manual intervention, indicating scope for further improvement.

Spain has succeeded in building on its traditional strengths in the Revenue, Regulation & Democracy sectors, where it provides a number of Transact level services. It has succeeded in improving the coverage of its online services to citizens, but there is an opportunity for Spain to strengthen its leadership structure and focus its attention on driving the eGovernment program forward in line with stated priorities.

UNITED KINGDOM	
Overall Maturity	Visionary Challengers
2002 Rank	6
2001 Rank	8
Vision Introduced	1998
Vision Title	Information age government

Vision Summary
The Government's vision is of modernized, efficient government, alive to the latest developments in e-business, and meeting the needs of citizens and businesses

Internet Penetration Rate 40 percent

United Kingdom_

The United Kingdom enjoyed the benefits of a cohesive eGovernment strategy, moving up two places to achieve an overall rank of sixth. The United Kingdom now takes its place as a leader among the Visionary Challengers.

The United Kingdom demonstrated its continuing commitment to effective eGovernment, namely a strong leadership structure to ensure the delivery of online government services, a clearly articulated action plan that leverages the resources of the private sector, effective communication to citizens and benchmarks for measuring progress.

Key to the United Kingdom's eGovernment program was the creation of the Office of the e-Envoy following the Prime Minister's announcement of the Government's commitment to delivering 100 percent of Government services online by 2005. Headed by Andrew Pinder, the Office has responsibilities across the whole e-agenda, notably e-commerce and eGovernment. There are two teams, the Policy Team, which focuses on operational and infrastructure strategies, and the Delivery Team, which drives the implementation of specific e-Envoy projects, such as the UKOnline.gov.uk portal and the Government Gateway. Douglas Alexander is the "e-Minister" with overall responsibility for the Government's e-agenda.

Originally launched as part of the Government's drive to modernize public services, the eGovernment vision has developed into the UK Online media campaign, which represents the Government's strategy of getting citizens, businesses and government online by 2005.

Another key area of the United Kingdom's approach to eGovernment is its tightly constructed action plans reporting via the UK Online Action Plan, which sets out 94 detailed recommendations for action, grouped under 25 key priority areas. The e-Envoy provides monthly progress reports on each of these recommendations to the Prime Minister and the e-Minister. The UK Online Annual Report supports the action plan and communicates the Government's progress in meeting its objectives of being at the forefront of the knowledge economy.

The United Kingdom Government achieved a ranking of ninth on Service Maturity Overall with its 44.4 percent score. This represents a 20.1 percent improvement over last year on this key measure.

Of the 129 services that the United Kingdom Government could deliver online, 121 are available to some degree, giving a Service Maturity Breadth of 93.8 percent. This is well above the global average of 85.8 percent, and reflects the continuing efforts of the Government in moving services online. In 2001 the Government introduced 18 new online services. For example, citizens can now request information on government consultation papers (green papers) from the UK Online Citizen Portal www.ukonline.gov.uk, and they can send an email to ask for more information about jury service on the Court Service, Lord Chancellor's Office website www.courtservice.gov.uk.

The United Kingdom's Service Maturity Depth score is 47.4 percent, exceeding the global average of 45.9 percent. In 2001 the Government succeeded in moving three services from Publish level to Transact level and four from Publish to Interact. For example, businesses can now pay their sales taxes on the HM Customs & Excise website www.hmce.gov.uk, following a manual registration procedure. On a Transact level, citizens can order and pay for postal products online at www.consignia-online.com.

The Postal sector is one of the United Kingdom's core strengths in the delivery of mature services. The United Kingdom's postal service www.consignia.co.uk provides an easy to use portal with access to several complete end-to-end transactions such as the purchase of postal goods online and an interactive delivery tracking service.

Mature services are being introduced in the Regulation & Democracy sector, for example, the Department of Trade and Industry's agency, Companies House www.ws1.companieshouse.gov.uk, where registered businesses with an account can email company accounts.

While both these services achieved the maximum score for Transact level services, there is still a long way for the United Kingdom to go in proliferating mature services. This is consistent with the Government's *Summer 2001 Electronic Service Review*, which found that 76 percent of online government services are for the provision of information. The review sets a target of reducing this to 63 percent as more transactional services become available.

The UK has adopted a careful approach to eGovernment, ensuring that the building blocks for successful implementation are in place before rolling out new services. In the Government Gateway site www.gateway.gov.uk the UK has in place a framework that will allow for rapid scaling of eGovernment service provision. This site offers a centralized registration service for secure eGovernment transactions. While only a handful of services are provided at the moment plans are in place to increase this number throughout 2002.

The United Kingdom maintained steady progress on the CRM measure with a score of 42.5 percent, although it slipped marginally in its ranking on this measure from three to five. The Department for Education & Skills website, accessible via the "Starting a New School" life episode at www.ukonline.gov.uk, achieved the maximum score with its service for parents of children starting school.

The Government's central portal - www.ukonline.gov.uk - supports its eGovernment vision and is designed specifically for businesses and citizens who need to interact electronically and securely with government. The front page menu offers a "Quick Find" service with links to a variety of government services, a "Your Life" section with content organized around citizens' intentions and a "CitizenSpace" option for citizens to contribute to government policy-making through official consultations. There is also a "Do it online" section for citizens seeking to transact with government, for example, applying for a passport or buying a TV license.

This year's research examined uGovernment, identifying the provision of government services via mobile devices. Although the Government has made a commitment to delivering services through alternative electronic channels, the research did not identify any initiatives in wireless delivery of services. In October 2000, the Land Registry launched a WAP service for getting property prices while the Department for Work and Pensions will pilot this year a digital TV service to provide pension planning, information and interactive services. However, with an ONS Omnibus Survey commissioned by the Government showing 8 percent of citizens connect to the Internet via mobile/WAP phones, there is considerable potential for the Government to introduce innovative services that go beyond the personal computer.

The United Kingdom Government is delivering on its plans to be at the forefront of the knowledge economy. The Government is achieving sound results with its strategy of securing the foundations of eGovernment and deploying more mature, sophisticated services.

USA	
Overall Maturity	Innovative Leaders
2002 Rank	3
2001 Rank	3
Vision Introduced	1993
Vision Title	Information Superhighway Updated with Expanded Electronic Government 2001

Vision Summary
To accelerate and streamline service delivery to citizens, reduce paperwork burdens on business, improve management and responsiveness of joint Federal-State-Local programs, and apply commercial best practices to improve government operating efficiency

Internet Penetration Rate 66 percent

United States_

The United States maintained its overall ranking to hold third position comfortably among the Innovative Leaders, achieving a score of 53.4 percent, leading 4th placed Australia on the overall result by 8.9 percent. With a significantly improved performance on the CRM measure, the USA has succeeded in closing the gap on the other leading CRM countries - Canada and Singapore.

Since the inauguration of President George W. Bush in early 2001, the Government has introduced a series of measures that impact on eGovernment, including the appointment of Mark Forman to the newly created position of Associate Director for Information Technology and E-Government, as well as an announcement of the new refreshed eGovernment vision entitled *Expanded Electronic Government*. The core promise of the vision is "citizen-centric" government.

The Government's action plan focuses on high quality customer service, reduction of expenses, greater transparency and easier access to government services, especially for citizens with disabilities. There is also recognition of the importance of projects that deliver gains across agency boundaries, such as e-procurement, e-grants, e-regulation and e-signatures. The eGovernment Task Force, charged with the responsibility of implementing the vision, has identified 23 initiatives to be deployed by multi-agency teams. The Government proposed a $100 million "e-Government" fund to help leverage the cross-agency initiatives, with an additional $20 million slated for 2002.

Specifically, the Government plans to upgrade the central government portal www.FirstGov.gov so it is organized around citizens' needs. It will also promote a digital signature initiative and introduce a procurement portal for agencies and businesses, www.FedBizOpps.gov, with the longer-term goal of facilitating supply chain management.

The United States achieved a ranking of third on the Service Maturity Overall measure, losing its pre-eminent position to Singapore and Canada, who increased their delivery of Interact and Transact services at a faster rate.

Of the 117 services for which the Government is responsible, 115 are available online to some degree, giving a Service Maturity Breadth of 98.3 percent. This exceeds the global average of 85.8 percent and is the highest rate of online service delivery among the countries in the survey.

The United States' Service Maturity Depth score at 57.9 percent, exceeds the global average of 45.9 percent. The research identified 11 services that have increased in maturity from Publish to Interact level in 2001, along with a new Transact level service that enables citizens to change their address. The service www.moversguide.com, offered by the United States Postal Service, requires citizens to email their inquiry and involves follow-up by conventional mail.

The United States made strong progress in the Revenue and Postal sectors, with a suite of Transact level services that achieved the maximum score in the research. In the Revenue and Customs & Excise areas, the US is embarking on several initiatives to improve its eGovernment service. The U.S. Customs Service is embarking on a Customs Modernization Program to improve Customs trade, enforcement, and administrative operations. The Customs Modernization Program will bring an enterprise approach to the implementation of new eGovernment business processes and associated infrastructure. The U.S. Internal Revenue Service is also undergoing a modernization effort, and will likely address unfulfilled citizen eGovernment demand.

Census information in the US can be found at www.census.gov. To obtain census figures, the user must set up an account. The majority of the information is available to download free of charge. Whilst at the Library of Congress provides legislative information online at www.thomas.loc.gov. Searches can be conducted using words or phrases, bill number, sponsor, date or status of the document in question. This site links to Congress and Legislative agencies. A 'Days in Session' calendar is available as well as access to historical documents. Users can obtain information regarding Legislation, Congressional Record and Committee Information in PDF format.

The proposed Executive Branch Management Scorecard, which calls for agencies to rate their performance against internal and external standards, will be an important tool in helping the United States accelerate its progress in delivering mature services to citizens and businesses across agency boundaries.

The United States significantly improved its performance on the CRM measure, lifting its ranking from 17th to third with a score of 45.2 percent. Standout sites in the research included the Department of Labor's website www.ajb.org, which provides citizens with an occupation search facility that delivers a resume list, along with the Department of Education and Student Financial Assistance Programs.

Of all the CRM metrics, the United States performed most strongly in the area of interactivity. There are significant opportunities for the Government to deliver on its promise of citizen-centric government by deploying services that are organized around the individual needs of users.

An excellent example of a consumer portal is www.consumer.gov is a "one-stop" link to a broad range of federal information resources available online. It is designed so the consumer can locate information by category such as Food, Health, Product Safety, Your Money, and Transportation. Each category has sub-categories to direct the consumer to areas within individual federal web sites containing related information. Again, the majority of the information is available to download free of charge, however there is also an online shop. Once an account has been set up, the user can proceed with the ordering and payment process. Extensive help features including tutorials are available at this site.

The incoming Bush Administration has moved quickly to introduce initiatives that will capitalize on the United States' position as an eGovernment leader, including strong executive leadership and a commitment to inter-agency cooperation.

"Governments are learning that transformation comes not from moving services online, but from redesigning the organization to put the citizen at the center"

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