

Digital Government

Pathways to Delivering Public
Services for the Future

A comparative study of digital government
performance across 10 countries

January 2014

A close-up photograph of a person's hand interacting with a silver tablet computer. The hand is shown from the side, with fingers resting on the screen. A large, stylized orange chevron shape is overlaid on the bottom right corner of the image, pointing upwards and to the left.

High performance. Delivered.

Foreword

Whilst navigating the continuing economic volatility, governments around the world are trying to fulfill their promises to deliver economic growth, social progress, safe and secure nations, and increasing their own productivity. High-performing governments are going digital: they are providing citizen-centric public service at the time and place needed, thereby driving high levels of citizen engagement and satisfaction. Accenture's latest research confirms that digitalization is at the heart of government transformation. The adoption of digital technologies in government brings substantial benefits to society and the economy.

This research was conducted by Accenture and the findings are exclusively Accenture's. The research was partially funded by The Government Summit, an annual initiative of the Prime Minister's office of the United Arab Emirates (UAE) and is the continuation of our ongoing thought leadership and research on digital government as part of Accenture's Delivering Public Service for the Future platform. The study is a comprehensive effort to assess the maturity and sophistication of digital government in 10 countries. We have looked at Brazil, Germany, India, Norway, Singapore, South Korea, the Kingdom of Saudi Arabia (Saudi Arabia), the UAE, the United Kingdom (UK) and the United States (US). We follow their pathways to digital excellence and aim to provide a thorough and insightful analysis on what sets the leaders apart.

Our unique and differentiated research approach combines three streams of analysis to provide a

360-degree view on the contribution of digital to a country's performance. We looked at current implementation levels of digital services, the overall service delivery experience as well as satisfaction levels of citizens. For that, we evaluated digital strategies of governments, conducted a comprehensive benchmarking exercise for a range of central government services, assessed their progress and looked at outcomes delivered. We also put ourselves in the shoes of citizens and business, and explored the services offered. In addition, we interviewed 5,000 citizens across the 10 countries to understand how satisfied they are with government service provision.

The study shows that digital is back with a bang and high on the agenda of governments. Countries that top the charts have a strong focus on their digital strategy, deeply embedded in their public reform agenda. They are continuing long-term investment in key information and communication technology (ICT) assets as well as leveraging the power of new technologies such as social media, mobility, analytics/big data and cloud computing. All this results in highly satisfied and engaged citizens and high-performing governments.

We hope that the report will serve as a trusted reference for government leaders and public managers to understand their digital journey and how to best use digital innovations to enhance interactions with the public as well as deliver public services more efficiently and effectively.

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INDEX

Table of Figures	06
Executive Summary	08
Research Scope and Methodology	11
1.1 Ten Country Overall Ranking	
Citizen Satisfaction Survey	14
2.1 Are the citizens satisfied?	
2.2 How to improve public services for the future? Some tips from citizens	
2.3 Using digital government: Citizens demand more	
2.4 In a speedily changing world, are governments acting or reacting?	
2.5 Engaging citizens and businesses	
2.5.1 Achieving greater citizen participation	
2.5.2 Business participation	
2.6 The role of new technologies in the digital future	
2.6.1 Social media and mobility	
2.6.2 Cloud computing	
2.7 The future of public services: Are government employees ready?	
Citizen Service Experience	27
3.1 Service Maturity	
3.2 Citizen Service Delivery Experience	
3.2.1 Citizen-centered interaction	
3.2.2 Cross-government service interaction	
3.2.3 Multichannel service delivery	
3.2.4 Proactive communication and education	
3.2.5 Comprehensive and updated use of new social media channels	
Progressing on the Digital Journey	32

Digital Maturity: Country Profiles

UK
US
Brazil
India
Saudi Arabia
UAE
Germany
Norway
Singapore
South Korea

35

Annexure 1: Methodological Framework of Our Research

72

Sources and References

76

Table of Figures

Figure 1 Benefits of digitalization	8
Figure 2 Cutters, Builders and Enhancers	9
Figure 3 Overall country ranking	10
Figure 4 Components of the digital government performance score	12
Figure 5 Countries overall rankings	12
Figure 6 Citizen satisfaction level in countries	15
Figure 7 Top government priorities according to citizens	17
Figure 8 Governments' digital principle for citizens' top priorities	17
Figure 9 Digital interaction with public services	18
Figure 10 Importance of digital government in the future	19
Figure 11 Comparison between digital interaction with public services and the importance of digital government in the future	19
Figure 12 Citizens who believe their government is proactive across the 10 countries	20
Figure 13 Citizens' perceptions of governments' agility for addressing challenges	21
Figure 14 Demand for citizen participation	22
Figure 15 Demand for business participation	23
Figure 16 Use of social media in interactions with government departments	24
Figure 17 Use of mobility in interactions with government departments	24
Figure 18 Use of cloud computing in interactions with government departments	25
Figure 19 Perception of public employees' skills	26
Figure 20 Countries ranked in Service Maturity	27
Figure 21 Countries ranked in Citizen Service Experience	28
Figure 22 Countries ranked in citizen-centered interaction	28
Figure 23 Countries ranked in cross-government service interaction	29
Figure 24 Countries ranked in multichannel service delivery	30
Figure 25 Countries ranked in proactive communication and education	31
Figure 26 Countries ranked in use of new media	31
Figure 27 Cutters' digital maturity journey	33
Figure 28 Builders' digital maturity journey	34
Figure 29 Enhancers' digital maturity journey	35

Figure 30 UK overall ranking	37
Figure 31 UK Citizen Satisfaction Survey	38
Figure 32 US—Alignment between the Information Management Strategy, IT Strategic Plan, Digital Government Strategy and Open Government Plan	40
Figure 33 US overall ranking	41
Figure 34 US Citizen Satisfaction Survey	41
Figure 35 Brazil overall ranking	44
Figure 36 Brazil Citizen Satisfaction Survey	44
Figure 37 India overall ranking	47
Figure 38 India Citizen Satisfaction Survey	47
Figure 39 Saudi Arabia overall ranking	50
Figure 40 Saudi Arabia Citizen Satisfaction Survey	51
Figure 41 UAE—Evolution of the e-government journey	54
Figure 42 UAE overall ranking	55
Figure 43 UAE Citizen Satisfaction Survey	55
Figure 44 Germany overall ranking	58
Figure 45 Germany Citizen Satisfaction Survey	58
Figure 46 Norway overall ranking	62
Figure 47 Norway Citizen Satisfaction Survey	62
Figure 48 Singapore overall ranking	65
Figure 49 Singapore Citizen Satisfaction Survey	65
Figure 50 South Korea—E-government journey	69
Figure 51 South Korea overall ranking	70
Figure 52 South Korea Citizen Satisfaction Survey	70
Figure 53 Components of the digital government performance score	72
Figure 54 Citizen Service Delivery Experience scoring classifications	74
Figure 55 Country categories: Cutters, Builders and Enhancers	75

Executive Summary

New digital technologies emphasizing speed and mobility are fundamentally changing the way we live, work and interact with each other. They are providing unprecedented opportunities for governments, enabling them to radically transform their complex bureaucracies to become more agile, citizen centric and innovative. Many countries have launched digital strategies in the last three years, but definitions of digital vary from being an umbrella term for a set of technologies and their applications (for instance, mobility, analytics, big data and cloud) to a new way of public service delivery to a holistic concept of a digital society. Like never before, governments are experimenting with innovative, technology-enabled service delivery models, which are starting to transform the way they work.

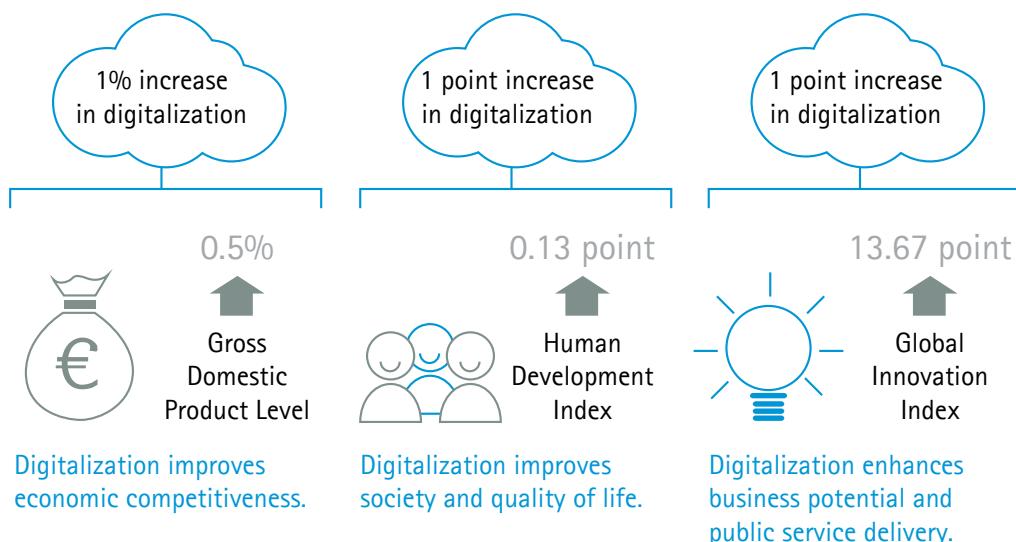
Wooing the digital citizens

This digital wave is transforming the relationship between citizens and governments. There is an opportunity for governments to engage much more deeply with citizens and significantly enhance the quality of service delivery. Accenture's Digital Citizen Pulse Survey confirms that the majority of citizens would prefer to use digital channels to access public services.¹

Figure 1: Benefits of digitalization

Digitalization has a positive impact

There are benefits for the economy, society and public services



¹Build it and they will come (<http://www.accenture.com/in-en/Pages/insight-digital-citizen-pulse-survey-summary.aspx>)

²Source: Achieving Digital Excellence in Public Service (<http://www.accenture.com/SiteCollectionDocuments/PDF/Accenture-Achieving-Digital-Excellence-in-Public-Service-US.pdf>)

As governments become more digital, and ensure that majority of the citizens have the right access and digital skills, they will see much higher levels of engagement, accountability and public trust.

Reinventing government digitally

Citizens' demand for personalized services has been recognized by most governments across the globe. In response, governments are building and enhancing digital channels and new service models. Digitalization is enabling them to bridge the gap between diagnosis and prescription to provide a demand-driven, citizen-centric public service ecosystem. Our research shows digitalization has tangible benefits for a country's overall competitiveness, society, business environment and quality of life (Figure 1).²

High performance in government is creating value from public services in an efficient and cost-effective manner. Major technology trends such as mobility, social media, big data, analytics and cloud offer a new paradigm for these governments to drive deep reform of services, processes and technologies.

What is a digital government?

We see digital government as the optimal use of electronic channels of communication and engagement to improve citizen satisfaction in service delivery, enhance economic competitiveness, forge new levels of engagement and trust, and increase productivity of public services. A digital government encompasses the full range of digitalization—from the core digitalization of public services to the digital infrastructure, governance and processes, including both front- and back-office transformation needed to deliver the new service paradigm.

The building blocks

If citizens across the globe are increasingly looking to interact with a digital government, how ready are governments to meet that ambition? What type of digital services and interactions do the citizens really expect from their government? What can we say about the levels of digital sophistication? And, to what extent are governments willing to invest and deploy digital technologies and tools to deliver public services?

The report is an assessment of the above questions and strategic intent of governments and their performance on digital services in 10 countries (To know more about the research and methodology, see Annexure 1). The 10 countries are Brazil, Germany, India, the Kingdom of Saudi Arabia (Saudi Arabia), Norway, Singapore, South Korea, the United Arab Emirates (UAE), the United

Kingdom (UK) and the United States (US).

Our research takes a 360-degree view of the digital government by combining the following three components:

- The Digital Maturity assessment looks at digital strategies in our target countries and provides the overall context to a country's digital government strategy and program, tools to deliver public services and the journey toward digital excellence.
- The Citizen Service Experience assessment looks at current implementation levels of digital services and overall experiences in terms of usage.
- The Citizen Satisfaction Survey assesses overall satisfaction levels of 5,000 citizens across the 10 countries.

To rank our countries, we have built country categories in relation to their economic position, digital maturity and strategic intent toward digital transformation. Cutters are economies aiming to reduce government expenditure to balance the budget and, thus, their focus on digital programs is primarily to drive cost efficiencies. Builders are focusing on putting the core infrastructure in place and digitalizing key public services, as well as enabling access to large, sometimes remote, populations. Enhancers continue to invest on enhancing the maturity of digital public services on the back of a strong economy and digitally engaged population (Figures 2).

Figure 2: Cutters, Builders and Enhancers

Cutters



High GDP and public debt
Base digital infrastructure in place
Focus on reducing government expenditure to balance the budget

Countries: [United Kingdom and United States](#)

Builders



Growing GDP and low public debt
Base digital infrastructure in place
Seek to build infrastructure to serve their economies and societies in the future

Countries: [Brazil, India, Saudi Arabia and United Arab Emirates](#)

Enhancers



High GDP but low public debt
Base digital infrastructure ready
Potential for digital capability enhancement given the strength of the economy

Countries: [Germany, Norway, Singapore and South Korea](#)

Our research results

Our research reveals that most governments in our 10 reference countries have rekindled their digital agenda. Through a combination of strategic vision and rigor, citizen centricity and implementation focus, these countries continue to harness the digital advantage.

Singapore and Norway that have mastered this three-pronged strategic path emerge as clear leaders (Figure 3). Countries in the Cutters category are ranked lower due to comparatively lower scores in citizen satisfaction, perhaps due to major austerity programs that may be perceived as fulfilling the government's own imperatives. However, their clear digital strategy and well-developed infrastructure position them well for the future.

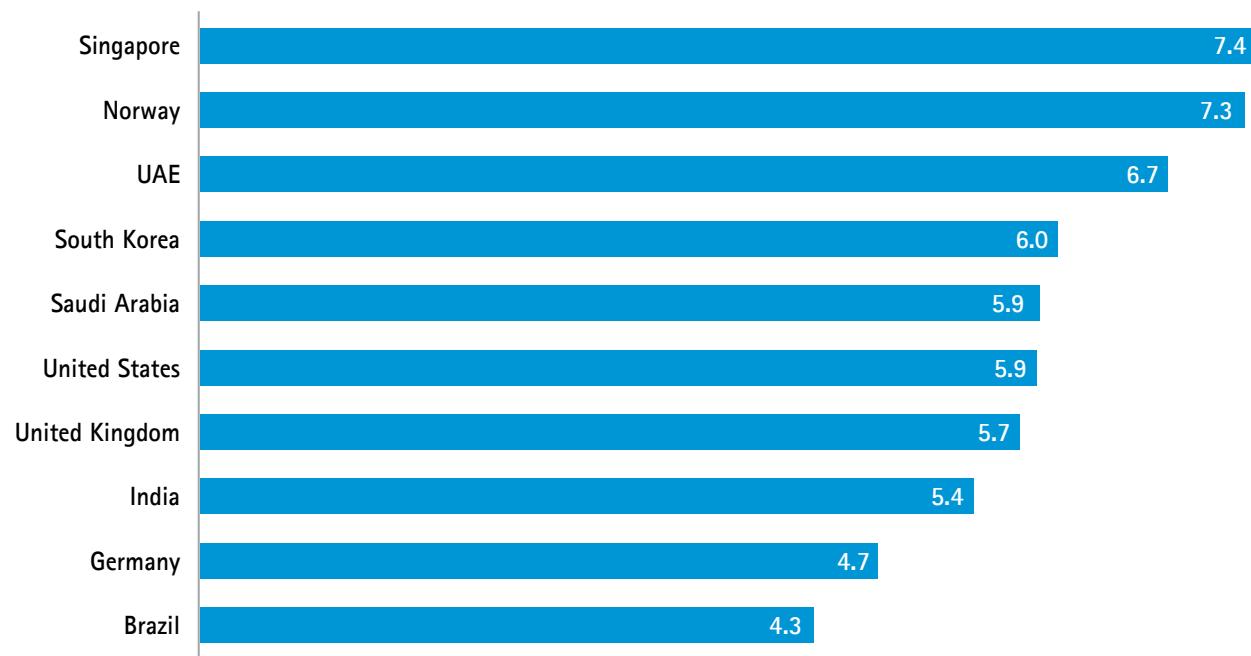
Builders have embraced the idea of enabling growth through digitalization. Despite some challenges, these countries show strong promise to implement digital solutions as an enabler of social progress. For

instance, the UAE's high rank owes mainly to its strong performance in citizen satisfaction and engagement, and citizens' confidence in the future. Indeed, Saudi Arabia, the other country surveyed from the Middle East, falls behind mainly because of lower performance in Service Maturity and Citizen Service Delivery Experience.

However, developing countries India and Brazil in the Builders category have some way to go to meet citizens' expectations and build trust in service delivery. Both the countries, despite having a long-term digital strategy and vision, fall behind in their measures on core infrastructure, service delivery experience and addressing issues of access and citizen centricity.

Overall, countries in the Enhancers category perform relatively better across all dimensions in delivering world-class public services through digital. Helped along by their robust economies and well-developed ICT infrastructure, these countries have achieved a high degree of success in achieving citizen satisfaction and public service efficiencies.

Figure 3: Overall country ranking



1. Research Scope and Methodology

Research scope

We used our experience of working with global public service entities to anchor a comprehensive in-depth research across 10 countries.

To measure Citizen Service Experience, Accenture appraised government's public service programs in a quantitative manner for the 10 countries by evaluating services offered at a federal or central-government level to ensure our analysis of the services was directly comparable across countries. Accenture researchers emulated businesses and service users, and attempted to fulfil service needs that typically might be provided at this level.

For measuring citizen satisfaction levels, Accenture conducted an online survey of 5,000 citizens across the 10 countries. The surveyed citizens largely belonged to an educated, digitally engaged group of people who have used or been exposed to online services on various devices for personal and professional needs.

Research approach and methodology

For the research, we followed a four-step process:

1. Establish hypotheses on Citizen Service Experience of the digital government's performance and citizen satisfaction levels.
2. Collect survey responses from citizens who use online digital platforms.
3. Analyze digital government's performance metrics and Citizen Satisfaction Survey findings.
4. Aggregate findings from the Citizen Satisfaction Survey results and Citizen Service Experience into an overall ranking for the country with supporting insights.

The research is based on three components under Citizen Service Experience, which provide the overall ranking for a country—Citizen Satisfaction Survey (demand side), Service Maturity (supply side) and Citizen Service Delivery Experience (supply side).

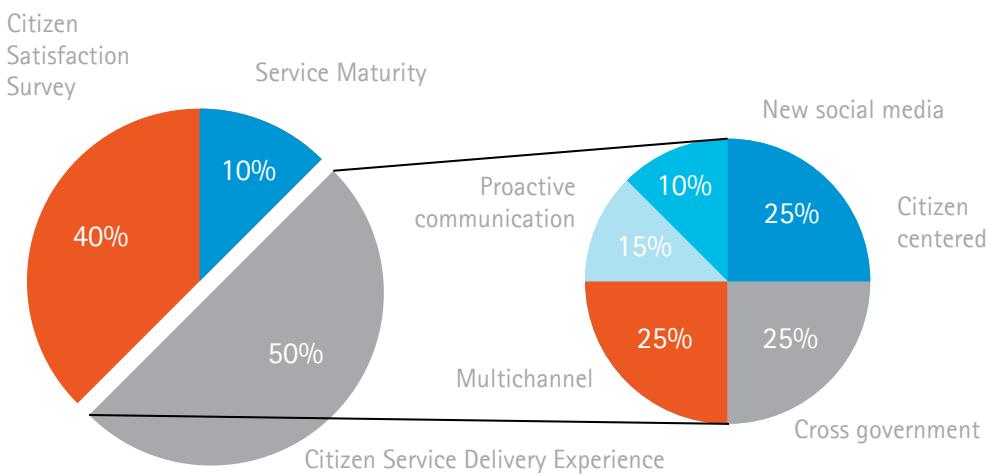
Overall Ranking in Citizen Service Experience is measured through three key components, each carrying a weight based on their relevance to the overall digital government performance to arrive at an integrated score.

- **Citizen Satisfaction Survey (CSS)** carries a weight of 40 percent within Citizen Service Experience. Citizens are the end users of public services with strong opinions about the role of their governments in providing excellence in services, and their voices should carry a lot of weight. These views have been quantified and incorporated in the scoring.
- **Service Maturity (SM)** measures the level to which a government has developed an online presence as an indicator. The importance of this factor has decreased over the years since e-governments (more informational in the nature of their digital presence) have become ubiquitous and less of a differentiator among countries. However, given e-government's continued importance to this measure, we have assigned it a 10 percent weight in our rankings.
- **Citizen Service Delivery Experience (CSDE)** carries a weight of 50 percent, and measures the extent to which government agencies manage interactions with their customers—citizens and businesses—and deliver service in an integrated way. The CSDE score considers how well governments have addressed the five pillars of leadership in customer service—citizen-centered, multichannel and cross-government service delivery, proactive communication and education, and social media.

Finally, we used the Digital Maturity dimension as a lens to view the digital governments' rankings. Digital Maturity compares the digital government initiatives of countries relative to one another instead of being an absolute measurement through a range of quantitative and qualitative variables across the key outcome areas in digital government public service delivery. See Figure 4 for the overall approach used to measure the digital performance of the government.

Figure 4: Components of the digital government performance score

Citizen Service Experience



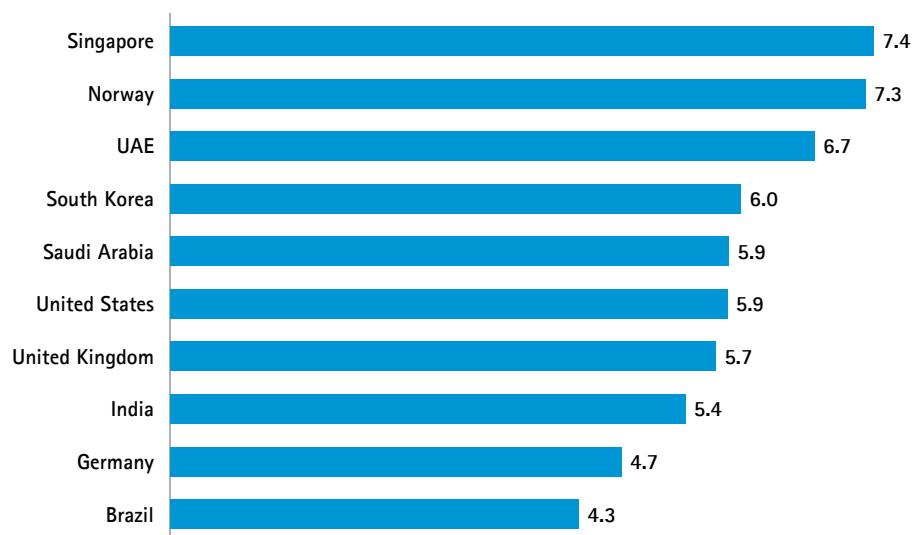
(To know more about the research methodology, see Annexure 1).

1.1 Ten Country Overall Ranking

We ranked the 10 countries on a scale of 1 to 10 based on the scores from the Citizen Satisfaction Survey, Service Maturity and Citizen Service Delivery Experience.

Singapore emerged as the overall leader (7.4), followed by Norway (7.3), and the UAE (6.7). South Korea (6.0), Saudi Arabia (5.9), the US (5.9) and the UK (5.7) formed the middle pack, and India (5.4), Germany (4.7) and Brazil (4.3) followed as the last three (see Figure 5).

Figure 5: Countries overall rankings



We found that despite having a well-developed infrastructure, the availability of online services and citizen participation channels differ widely within the countries in the Cutters category, which lag behind the Enhancers. The governments in the Cutters category, the UK and the US, demonstrate moderate levels of prioritization of ICT even though most of them have articulated a digital government strategy with clear implementation plans. The perceived government efforts in leveraging digital to drive greater economic competitiveness and public sector productivity remained mixed.

Indeed, the UK and the US are ahead in terms of Service Maturity, but not in terms of engagement as observed in the Citizen Satisfaction Survey. We found that these countries are focusing on driving efficiencies and cost cutting, which may be seen by their citizens as government centered, rather than being truly citizen centered.

The growth trajectory among countries in the Builders category is driving governments to develop a more progressive public sector, with an emphasis on ICT as a key enabler. Performance in the areas considered by our study remained constrained by unequal access to ICT and education infrastructure. There is an opportunity for these countries to leverage digital creatively to leapfrog the adoption curve and build quality public services that are available to all.

The UAE is a strong performer from the Builders category, ranking third, leading the way in citizen satisfaction and engagement. Its citizens are cognizant of the importance of digital channels in improving service quality and outcomes, and confident of their government's ability to meet the challenges that may arise in the process. At the same time, the UAE government is focusing on placing high priority in digitalization. However, there are opportunities for improvement that exist for the government in the areas of citizen centricity and multichannel service delivery.

Saudi Arabia scores behind the UAE in citizen satisfaction and confidence where citizens are demanding more focus on education. Incidentally, while the country's Citizen Service Experience score is on the lower side, the citizens are satisfied and confident of the government's ability to deliver service quality and

outcomes. The opportunities that exist for Saudi Arabia are for delivering citizen-centric services in a cost-effective manner.

Other Builders in the category, such as India and Brazil, score higher in Citizen Satisfaction Survey than Service Maturity and Citizen Service Delivery Experience, where significant improvement is needed for both countries. It was observed that while the Brazilian government is committed to a clear digital strategy and is building a robust infrastructure, its citizens seem less satisfied with the public services offered and want to be more involved in shaping them. Similarly, the Indian government is on track with its e-governance plan for improving citizen engagement and satisfaction; however, it needs to focus on accelerating execution with greater transparency and citizen involvement.

We found countries in the Enhancer category have performed relatively better across most dimensions, as compared to the other two categories. This can be attributed to their conscious effort to deliver world-class public services through digital platforms. Given their robust economies, well-developed ICT infrastructure and informed societies, countries in the Enhancer category have invested in building their digital governments to drive citizen satisfaction, economic competitiveness and public sector efficiencies, with varying maturities. The challenge for countries in the Enhancers category is further leveraging digital to drive greater citizen engagement.

Singapore and Norway are leaders in digital government service with Singapore leading the way due to a sustained focus and investment in ICT across a range of public services, such as health and education. Norway has a highly engaged digital citizenry and does more on communication and social media presence.

Other Enhancers such as South Korea and Germany have scored poorly on dimensions such as citizen satisfaction and engagement. This could be the result of not having a single integrated presence for citizen and business services in the case of Germany and not involving the citizens more formally in rule-making processes in the case of South Korea.

2. Citizen Satisfaction Survey

Citizens' expectations from their governments have risen significantly in recent years, encouraged in part, by their experiences with the private sector, such as banking, consumer goods, media and entertainment services.

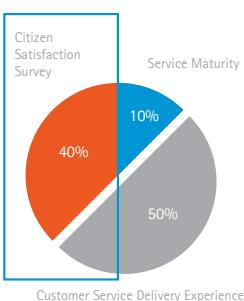
Governments have often been playing catch up. Their approach has primarily been supply driven—top-down, one-size-fits-all service delivery—led by archaic rules and budget constraints. This approach is out of step with current realities. Mega trends such as mobility, social media and big data, powered by analytics and cloud computing, offer a new paradigm shift for governments to drive reforms in public services, processes and technologies. Governments run the risk of becoming irrelevant if they don't start delivering public services to the new digital citizens—now.

Accenture conducted a citizen survey to identify the gap between demand and supply in the provision of public services. The objective of the survey was to:

- Discover general attitudes toward the digitalization of government operations, and understand the depth of interactions between citizens and the government.
- Measure the level of satisfaction with government services against expectations.
- Appraise the confidence level of citizens and understand their priorities.
- Determine current and future channels used for different types of government transactions.
- Assess the likelihood of citizens using new emerging technologies for government transactions.

2.1 Are the citizens satisfied?

Accenture research found that an important aspect of a successful, sustainable digital government is aligning initiatives with their citizens' or constituents' expectations and preferences, thereby improving overall satisfaction and building trust and engagement. Our study found a strong correlation between improved



quality of services and a stronger relationship between citizens and their governments. This is the predominant reason countries in the Builders category, such as the UAE and Saudi Arabia, lead in terms of satisfaction with the quality of services among the reference group, demonstrating that it is more about the direction of travel, rather than reaching the destination. (Figure 6). The citizens perceive that the governments have evolved over time and taken initiatives to proactively communicate through various digital channels, including social media. For example, Saudi Arabia ranked nineteenth in the world in the United Nations E-government Survey 2012³ and is also recognized for leveraging ICT to improve access to basic service for citizens.

As an average across the 10 countries, less than 40 percent of the surveyed citizens are satisfied with the quality of public services in their country. Despite being the leaders in digital services, South Korea and the US, rank low on the Citizen Satisfaction Survey.

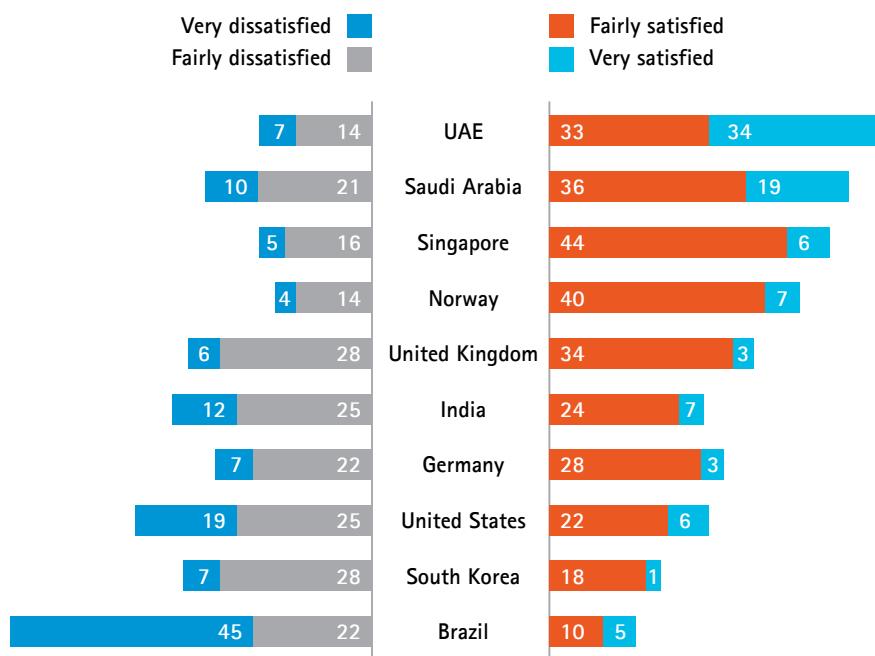
- South Korea, which ranked quite high in Service Maturity and is considered one of the leaders in ICT development, ranked second to last in terms of citizen satisfaction levels. Its citizens' dissatisfaction stems from their perception of wastefulness in public spending by the government and increased demand for information on issues related to policymaking—aspects also forming part of the top priorities identified by the citizens for their government. The World Economic Forum (WEF) Global Competitiveness Index 2012–13⁴ ranked the country 133 out of 144 economies—the lowest in its peer group—in terms of transparency of government policymaking.
- The US government is focusing on cost reduction as a priority agenda at both federal and state levels, though this could be seen by its citizens as a government-led approach to fulfill budget constraints rather than being truly citizen-centric. It ranked 76 out of 144 countries on the control of wastefulness of public spending score in the WEF's Global Competitiveness Index 2012–13. Additionally, citizens reported feeling uncomfortable interacting with their government through digital channels (including social, mobile and cloud computing) which may also contribute to the country's low ranking on citizen satisfaction.

³Source: <http://unpan1.un.org/intradoc/groups/public/documents/un/unpan048065.pdf>

⁴Source: http://www3.weforum.org/docs/WEF_GlobalCompetitivenessReport_2012-13.pdf

Figure 6: Citizen satisfaction level in countries

We asked: Overall, how satisfied or dissatisfied are you with the quality of public services in your country?



2.2 How to improve public services for the future? Some tips from citizens

We asked citizens to select the top priorities they felt governments should focus on to improve public services. The set of options included:

- Publish information on public services so that citizens can evaluate the effectiveness.
- Provide more services through digital channels, such as online or mobile.
- Understand the priorities of citizens and communities better.
- Provide services in a more cost-effective way.
- Make sure that services are tailored to the needs of people using them.
- Work more closely with businesses and nonprofit organizations.
- Improve the skills of people who work in public services.
- Improve understanding of what works well and what doesn't.
- Involve citizens in deciding how public services should work.

- Respond to changes flexibly, such as adopting new technologies or an increased demand for a particular service.

- Plan for the long term, not just the next few years.

Citizens selected **understanding the priorities of citizens and communities better** (34 percent) as their top priority for improving public services for the future. This clearly demonstrates that a majority of the surveyed citizens believe their governments do not understand or give enough importance to their needs, conditions and requirements. We found that citizens want their governments to engage in a more consultative process with them more regularly to understand their needs and expectations better, and to design and deliver customized services to meet these needs. The second most important priority cited by the citizens was **planning for the long term, not just the next few years** (33 percent). Not surprisingly, citizens are cognizant of the fact that many social and economic outcomes require long-term planning and cannot be improved in the short term. The other priorities cited by the surveyed citizens included: **providing services in a more cost-effective manner** (31 percent) and **making sure that services are tailored to the needs of people using them** (27 percent).

Incidentally, countries in the Enhancers category, such as South Korea and Norway, stand out because "better understanding of the priorities of citizens and communities" does not appear among the top three priorities for their citizens. Instead, as we highlighted earlier for South Korea on the issue of lack of transparency, accountability and skills of people is a top priority for these citizens (Figure 7).

In the Builders category, cost efficiency (39 percent), plan for the long term (36 percent) and understanding the priorities of citizens and communities better (35 percent) form the top three priorities for the surveyed citizens from the UAE. Its citizens feel that long-term planning, and appropriate communication and rollout of digital services will help increase their confidence in their government. The government, on its part, is undertaking major initiatives to reduce wastefulness in public spending as well as leveraging ICT for higher cost efficiency. For Saudi Arabia, the order of priorities is slightly different: plan for the long term (38 percent) ranks as most important, followed by understand the priorities of citizens and communities (36 percent) and cost efficiency (33 percent). In line with these priorities, several ministries in Saudi Arabia are taking transformative initiatives to increase the use of digital innovations to address major public policy challenges and enhance citizen interaction.

Further, the study findings revealed some common themes and principles adopted by countries in each category that help meet some of their citizens' and constituents' needs (Figure 8), such as:

- **Robust and clear digital strategy:** Countries in the Cutters category, such as the US and the UK, have articulated a digital government strategy with clear implementation plans, and a major focus on achieving cost efficiencies by shifting demand from traditional to digital channels. For instance, the UK government is embracing a strong digital strategy to create world-class citizen-centric services, while driving efficiency gains and economic progress. It has established the Government Digital Service (GDS) for scaling up the digital services provided to citizens. Defined by a robust implementation road map and key performance indicators, the digital strategy contains 16 actions the government will take to become "Digital by Default,"

with the intention of dramatically increasing the scale and quality of online provision of government services (See the UK country profile).

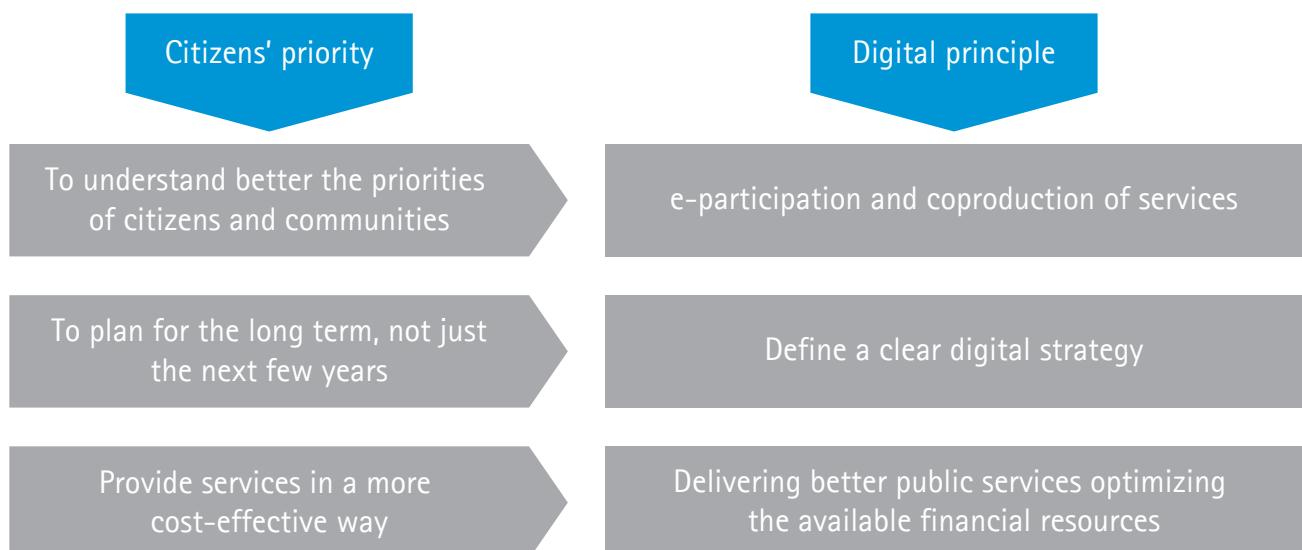
- **E-participation and coproduction of services:** The advent of new collaboration technologies, collectively known as Web 2.0, has opened up a number of new ways citizens and communities can participate in the public sector. While a majority of the reference countries promote citizen consultation and participation through online platforms, countries in the Enhancer category rank higher in e-participation. They emphasize e-participation brings citizens into a consultative process on performance and policymaking.
- **Focus on cost efficiencies:** Optimizing financial resources has gained importance in the aftermath of the economic crisis. Economies that have been severely affected by the current global volatility, focus on reducing government expenditure to balance their budgets. As a result, governments are increasingly seeking digitalization to achieve significant cost efficiencies. For example, the Society of Information Technology Management's 2012 study across 120 local councils estimated that the cost of contact for face-to-face transactions averages US\$13.84, for telephone US\$4.54, but for the Web only US\$0.24. This is further supported by its Digital Efficiency Report, which found that the average cost of a central government digital transaction can be 20 times lower than the cost of telephone and 50 times lower than face-to-face interactions. The UK government now estimates that moving these transactional services from offline to digital channels will save US\$2.7–2.9 billion a year (See the UK country profile).

Figure 7: Top government priorities according to citizens

We asked: Which three of the following do you think are most important for the government to focus on to improve public services in future?

Country	First priority	Second priority	Third priority
Brazil	Understand better the priorities of citizens and communities (54% vs. 64% in 2012)	Improve the skills of people who work in public services (34% vs. 47% in 2012)	Involve citizens themselves in how public services should work (34%, on par with 2012)
Germany	Make sure that services are more tailored to the needs of people using them (43% vs. 46% in 2012)	Understand better the priorities of citizens and communities (43% vs. 36% in 2012)	Be flexible to respond to changes around them (25% vs. 23% in 2012)
United Kingdom	Plan for the long term, not just the next few years (45% vs. 39% in 2012)	Understand better the priorities of citizens and communities (35% vs. 42% in 2012)	Provide services in a more cost-effective way (34% vs. 45% in 2012)
India	Plan for the long term, not just the next few years (35% vs. 14% in 2012)	Understand better the priorities of citizens and communities (33% vs. 39% in 2012)	Involve citizens themselves in deciding how public services should work (31%)
Saudi Arabia	Plan for the long term, not just the next few years (37%)	Understand better the priorities of citizens and communities (36%)	Provide services in a more cost-effective way (33%)
South Korea	Publish information so that people can hold public services to account (33%)	Plan for the long term, not just the next few years (28%)	Provide services in a more cost-effective way (26%)
Singapore	Understand better the priorities of citizens and communities (45% vs. 64% in 2012)	Make sure that services are more tailored to the needs of people using them (34% vs. 38% in 2012)	Provide services in a more cost-effective way (29% vs. 32% in 2012)
UAE	Provide services in a more cost-effective way (39%)	Plan for the long term, not just the next few years (36%)	Understand better the priorities of citizens and communities (35%)
Norway	Make sure that services are more tailored to the needs of people using them (47%)	Plan for the long term, not just the next few years (37%)	Improve the skills of people who work in public services (36%)
United States	Provide services in a more cost-effective way (45% vs. 51% in 2012)	Plan for the long term, not just the next few years (44% vs. 35% in 2012)	Understand better the priorities of citizens and communities (33% vs. 40% in 2012)

Figure 8: Governments' digital principle for citizens' top priorities



2.3 Using digital government: Citizens demand more

Overall, half of the surveyed citizens say they use digital channels very or fairly often to interact with their governments (Figure 9). This number increases to 60 percent if we look at the top six countries. In Saudi Arabia, citizens are highly conscious of the importance of digital channels in enhancing social outcomes and service quality, with 65 percent citizens using this medium for interaction with their government. As a result, Saudi Arabia is making a large number of public services available through digital channels. For example, the Virtual Labor Market ecosystem that the Ministry of Labor and the Human Resources Development Fund are launching to serve all stakeholders in the labor market is testimony to this approach. It aims to create a robust job database and matching engine that job seekers can access easily. The program will provide the necessary job search support, online training and counseling services, and support private employers in locating qualified resources to increase employment opportunities for Saudi Arabia citizens, including women and disabled persons (See the Saudi Arabia country profile).

Even governments of emerging countries are responding to this digital need. India's Cabinet, for example, has

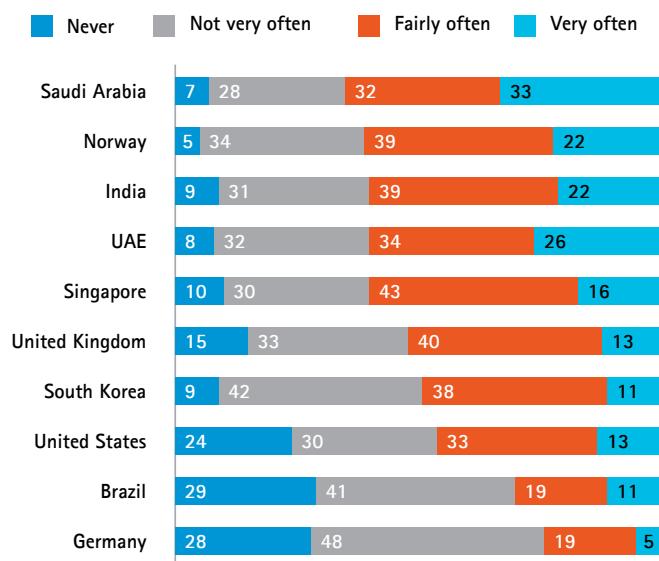
cleared the Electronic Delivery of Service Bill that will deliver all public services, from state and central governments, electronically in the next eight years. The bill will allow Indian citizens to gain access to services such as passport, ration card and driving license electronically.⁵

Conversely, Germany ranked below the all-country average for using digital services (a mere 24 percent). These findings should be taken in the context of cultural nuances and other factors such as highly engaged and urban citizens, which may affect the results. One of the biggest obstacles in Germany to an increased use of digital channels could be concerns over data privacy and security.

Citizens' hopes and intent about public service for the future expresses a strong argument for governments to expand service provision through digital channels. When we asked the citizens for their opinion on how important is it for governments to provide more services through digital channels in the future, the results are more consistent across the reference countries—with 81 percent of the citizens considering it fairly or very important. The percentage is as high as 94 percent for the UAE, followed by 92 percent for Saudi Arabia (Figure 10).

Figure 9: Digital interaction with public services

We asked: How often, if at all, are you currently using digital channels—online or mobile—to do business with public services?



⁵Source: <http://www.medianama.com/2013/03/223-the-lowdown-indian-government-clears-electronic-delivery-of-service-bill/>

We see the largest demand gap (the gap between where governments are today in fulfilling service needs and what levels are being demanded by citizens) with respect to current usage in Brazil (168.5 percent) and

Germany (159.1 percent), where citizens accord high importance to digital channels for future use (Figure 11).

Figure 10: Importance of digital government in the future

We asked: How important is it for governments to provide more services through digital channels in the future?

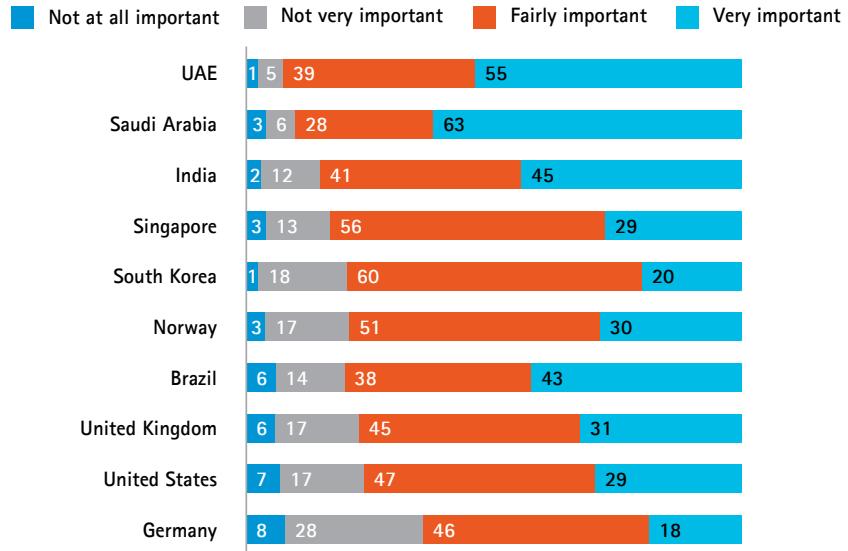
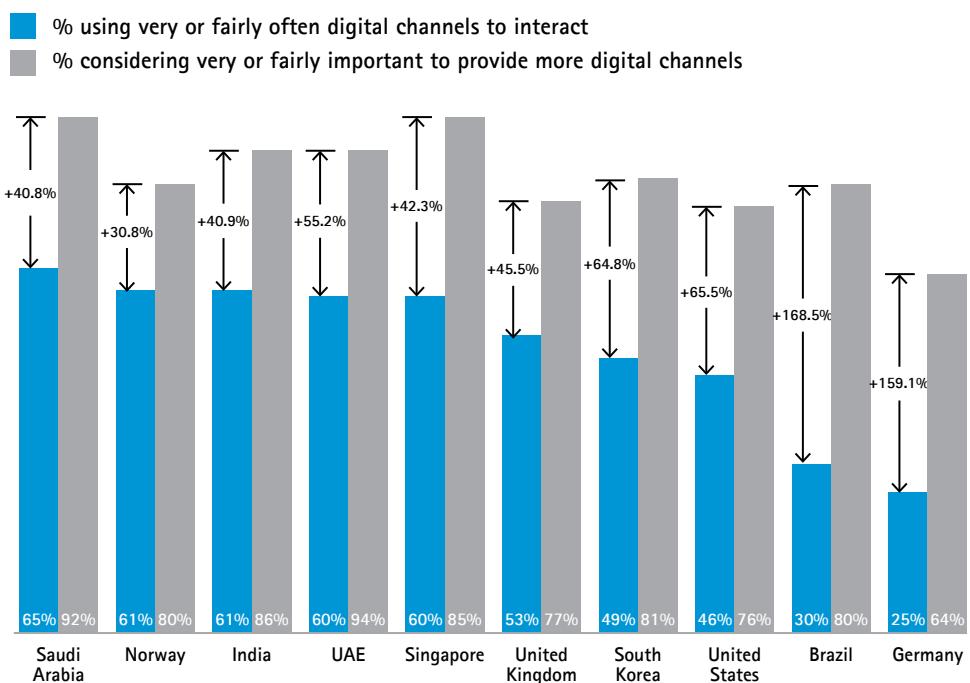


Figure 11: Comparison between digital interaction with public services and the importance of digital government in the future



2.4 In a speedily changing world, are governments acting or reacting?

Citizens have been demanding public services that promote a flourishing society, safety and security, and economic vitality. They want their governments to operate efficiently and respond quickly to emerging challenges. This is especially important in the current global context, with high economic volatility. Being agile and responding proactively to issues is now one of the core competencies needed. However, our survey indicates that only 17 percent of the surveyed citizens, across the 10 countries, feel that their governments are proactive to a great extent—across public safety, employment, social security, health, education, housing and economic development. There emerges a clear need for governments to be more insight driven rather than react in a perpetual catch-up mode (Figure 12).

Figure 12: Citizens who believe their government is proactive across the 10 countries

Parameters	Proactive (to a great extent)
Employment	13.4%
Public safety	23.4%
Health	16.9%
Education	17.5%
Housing	13.4%
Economic development	18.3%

Case study

Using a virtual labor market to drive efficiency

The German Federal Ministry for Labor and Social Affairs developed a Virtual Labor Market (VLM), an online platform to enable successful reintegration of jobseekers into the labor market. The platform integrates three elements: an online job portal, an internal system supporting employment service and vocational counseling, and an online job-crawler that collects job vacancies from companies' websites. Through the VLM, jobseekers can manage their applications and tailor them to employers' demands. Companies, in turn,

receive assistance and operate a wide number of tools to manage their job postings, besides being able to access a large pool of candidates. For both groups, a specific matching technology presents results weighted over 40 parameters that go beyond the headline job title and allow for better matching of candidates (See the Germany country profile).

Enhancing citizen satisfaction through process automation/simplification

The Norwegian State Education Loan Fund, Lånekassen, supports citizens with loans and grants for their further education. It is one of the leading state agencies that

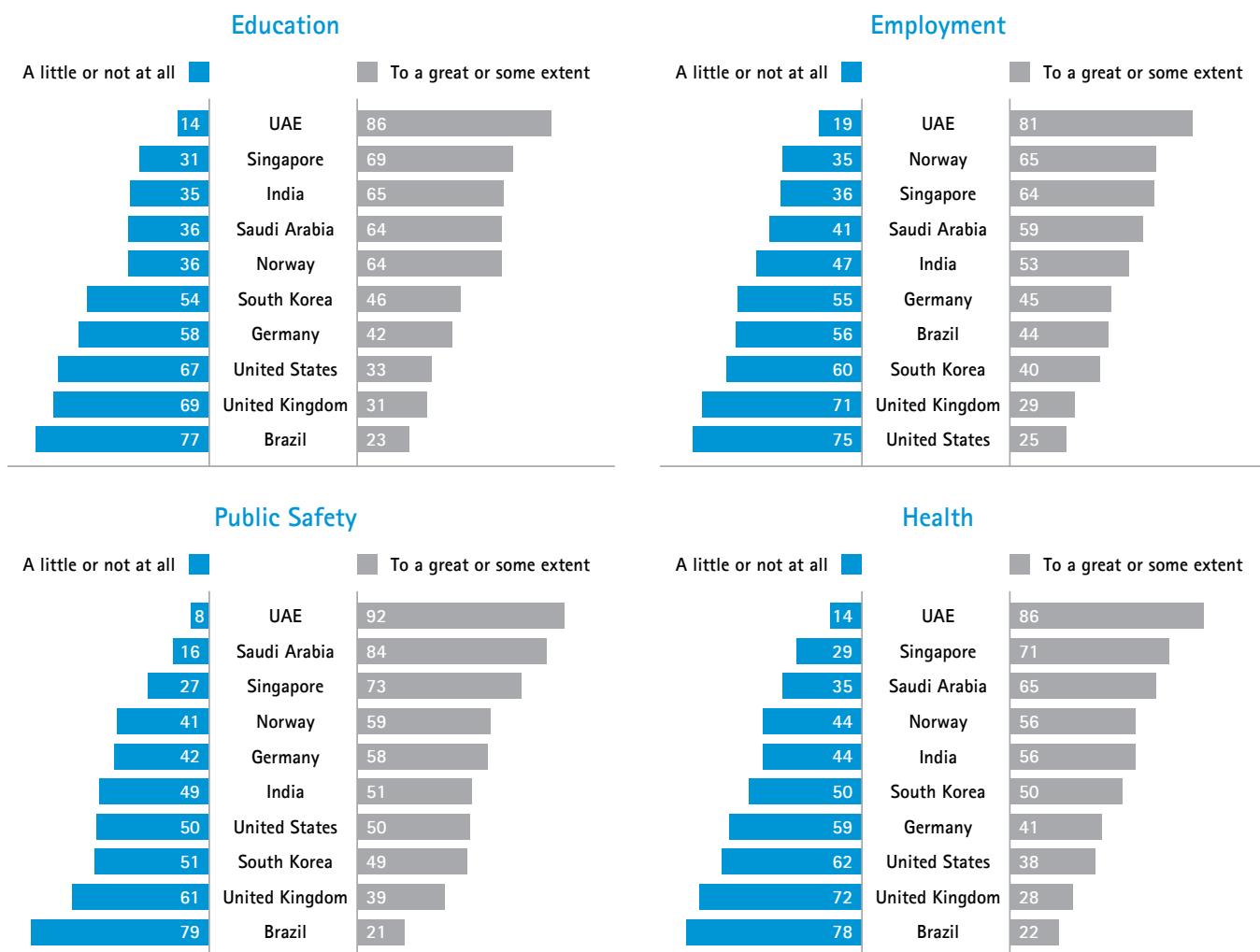
have leveraged ICT to provide quality services, improve operational efficiencies and reduce paper work. Lånekassen has implemented a digital case management system that has generated valuable results to benefit the citizens and the agency. The new digital system allows processing more than 60 percent of the loan requests automatically without involving a case manager. It also allows the agency to access income information directly from the Norwegian Tax Administration, which simplifies the application process. For the citizen interface, the agency has developed a customer portal that offers a range of self-service options and allows the citizens to use it 24/7. As a result, the management time for loan applications has reduced from 16 days to just eight days. The agency has been able to reduce staff by 16 percent and realize cost savings of US\$8.8 million annually for

the last seven years. The system has improved citizen satisfaction significantly and reduced the number of telephone inquiries from 1.5 million to 450,000 per year.⁶

When we asked citizens to rank governments on their agility to address challenges in the education, employment, public safety and health sectors, we found that the UAE leads the pack in all four areas. While Singapore and Saudi Arabia stand out as the other leaders in these sectors (Figure 13).

Figure 13: Citizens' perceptions of governments' agility for addressing challenges

We asked: Is the government acting fast enough to address challenges in each of the following sectors?



⁶Source: <http://www.microsoft.com/government/www%2Fpublic-services%2Fblog/Pages/post.aspx?postID=229&alID=75>

2.5 Engaging citizens and businesses

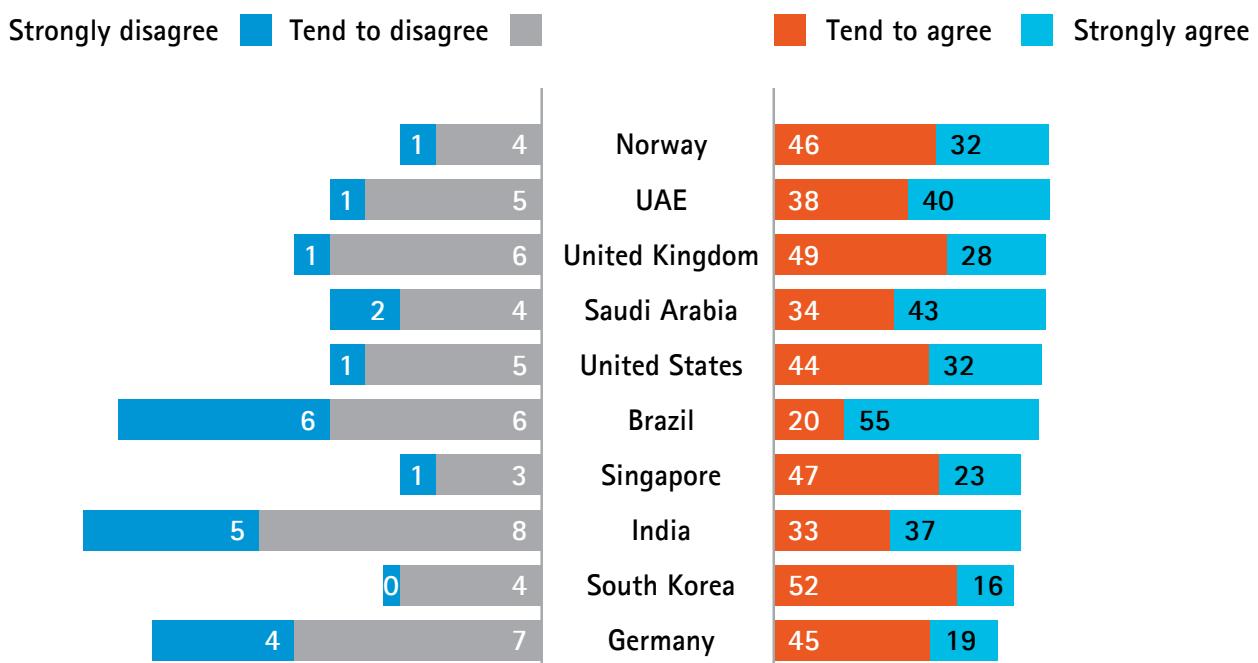
2.5.1 Achieving greater citizen participation

Public services need to increasingly involve citizens in the service design—engaging them through online platforms (both to educate and to gain citizen inputs) and for expanding their options. Our Citizen Satisfaction Survey results showed that all governments need to proactively seek and secure citizen involvement. Even in Germany, which has the lowest score in this category, 64 percent of surveyed citizens believe that people should be more involved in shaping how public services are designed and delivered (Figure 14). While South Korea, ranked second to last, has a vision to promote the use of public services and active citizen

participation, leveraging mobility in a big way, through smart devices and government services. In the UK, the emphasis on citizen participation can be seen from its effort to provide greater citizen consultation through online platforms. E-democracy tools, such as e-voting and e-petitions, are starting to enter the mainstream of public administration.

Figure 14: Demand for citizen participation

We asked: Should people be more involved in shaping how public services are designed and delivered?



2.5.2 Business participation

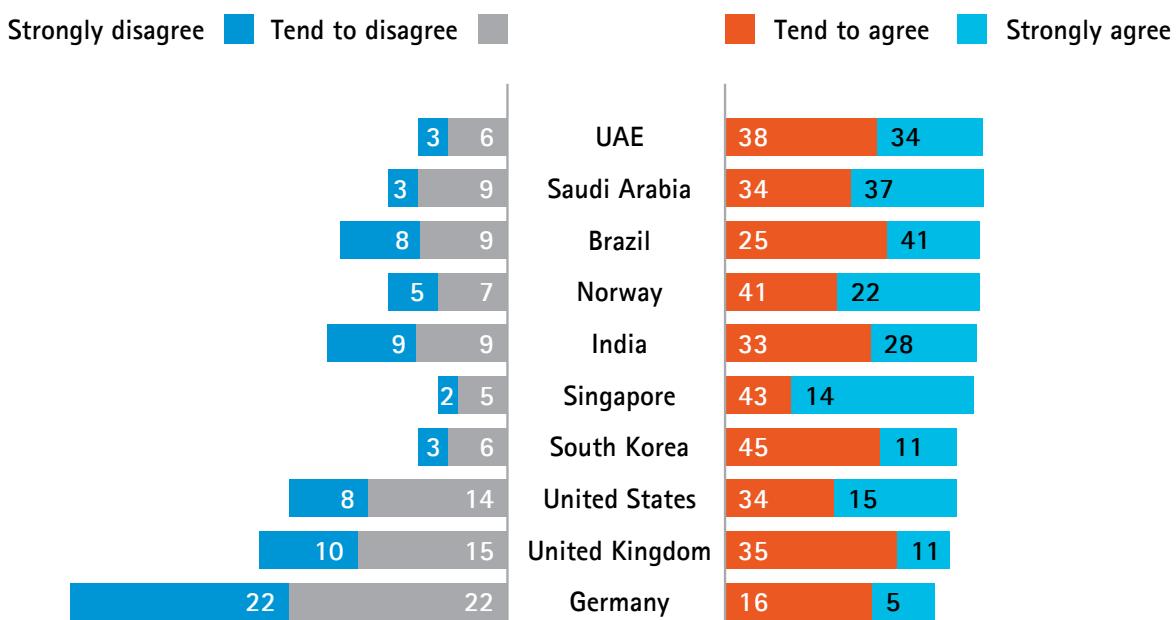
Governments are increasingly feeling the need to develop collaborative ways of working across government agencies, nonprofits, businesses and community groups. This calls for greater coordination and integration of policies, and service design and delivery across multiple organizations.

Our Citizen Satisfaction Survey showed that all countries—excluding the bottom three countries (the US and the UK from the Cutters category, and Germany from the Enhancers category)—have scored more than 55 percent with respect to the importance of business participation in public service (Figure 15). Countries in the Builders and Enhancers categories have voted for higher business participation. This can be explained by an increasing appetite for entrepreneurialism, and to keep the engine of the economy revving toward higher

competitiveness. However, we see countries in the Cutters category score lower, as governments in these economies have pursued major austerity programs, and thus citizens feel they need to address their priorities and needs ahead of businesses. The UK, the US and Germany score low and, perhaps, there is a perception that big businesses, specifically in the financial sector, are largely responsible for the current state of affairs; and therefore, citizens are advising keeping businesses at arm's length while designing public services.

Figure 15: Demand for business participation

We asked: Should businesses be more involved in shaping how public services are designed and delivered?



2.6 The role of new technologies in the digital future

It is interesting to note that all the countries in the builders category appear among the top four in the usage of technologies (such as social media, mobility and cloud computing) while interacting with their governments. And, all the countries in the cutter category rank among the last three.

New technologies, such as social networking, mobility and cloud-based services, provide an unprecedented platform for citizens to discuss and debate issues, voice their concerns, exchange information, petition governments to make improvements in

public services and even to work together to improve the quality of life in their communities. Our Citizen Satisfaction Survey across social media, mobility and cloud throws up some interesting findings.

2.6.1 Social media and mobility

Overall, 64 percent of the surveyed citizens stated they already use social media or would like to use it in the future as a means of interacting with their government. This percentage is higher at 82 percent in Saudi Arabia and at 81 percent in India and Brazil (Figure 16). We see huge potential for these technologies to facilitate more open government and collaborative ways of achieving better outcomes with multiple stakeholders. Citizens and businesses can now tell public service organizations what they need and what they think about a range of issues—from school closures and hospital standards to regulation, public sector reforms or cost-cutting measures. Such feedback can drive innovations in service delivery, and form the basis for a new participative society. For example, the Brazilian government is making an effort to use social media to communicate with its citizens. Its twitter handle @egovbr has 32,925 followers, @TrabalhoGovBr has 193,308 followers and @minsaude has 246,470 followers as on January 13, 2014. On the contrary, most mature western countries show a strong reluctance in using social media, reflecting their concerns about data privacy.

Our survey revealed similar results about the use of smart mobile devices, though the acceptance of this technology channel is more universal (Figure 17). In the case of US, to increase the adoption of new digital

channels, part of the federal government's objectives in the 2012 digital strategy was to more easily deliver information and services across multiple channels. It launched an online gallery for mobile websites and made available 140 free applications from the federal government on iOS and Android platforms, in English and Spanish.

Figure 16: Use of social media in interactions with government departments

We asked: Would you personally like to use social media in the future when interacting with government departments offering public services?

■ Not interested ■ Currently using and interested in using

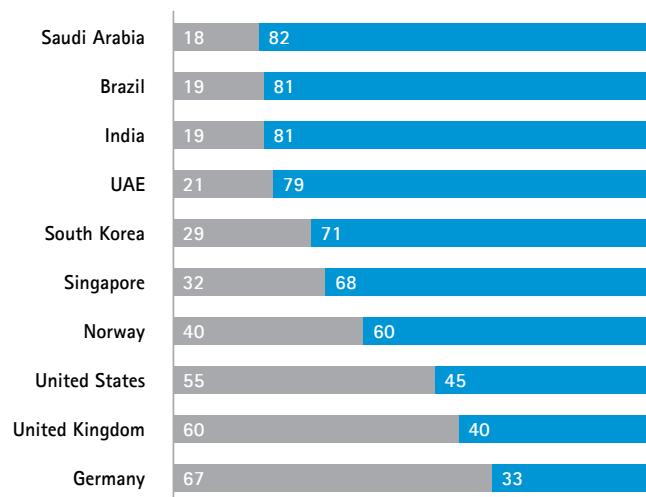
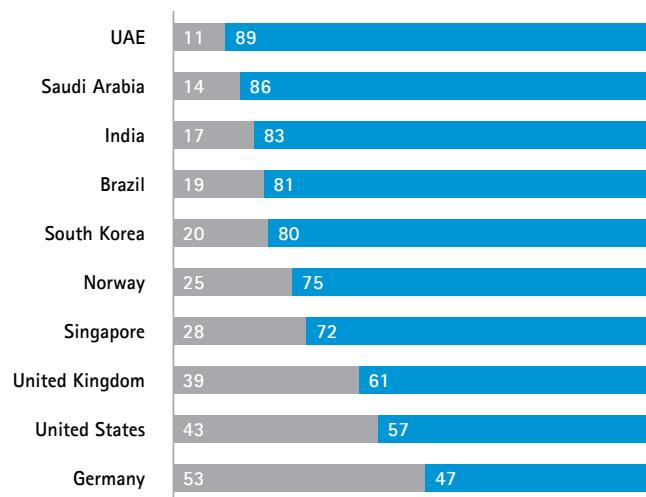


Figure 17: Use of mobility in interactions with government departments

We asked: Would you personally like to use mobile devices in the future when interacting with government departments offering public services?

■ Not interested ■ Currently using and interested in using



2.6.2 Cloud computing

Cloud computing offers great potential to securely store and share government and citizen data, thereby eliminating the need for departments to house and manage their own IT infrastructure. It helps reduce operating costs and drive much higher efficiencies for the back office and front office. Our survey showed high acceptance for cloud computing, even in countries that tend to be concerned about data privacy and security. Overall, 69 percent of citizens are using or interested in using cloud computing (Figure 18).

Countries in the Builders category—India, Saudi Arabia, the UAE and Brazil—form the top four countries in our Citizen Satisfaction Survey, where citizens are using cloud computing or are willing to use it in the future when interacting with their governments. For example, the UAE Federal E-government Plan 2014 aims to catalyze a full-scale adoption of e-services. It will enhance legislative environment for e-services, attain an advanced ICT infrastructure, and develop the institutional framework for e-government and cloud computing strategy for the federal government (See the UAE country profile).

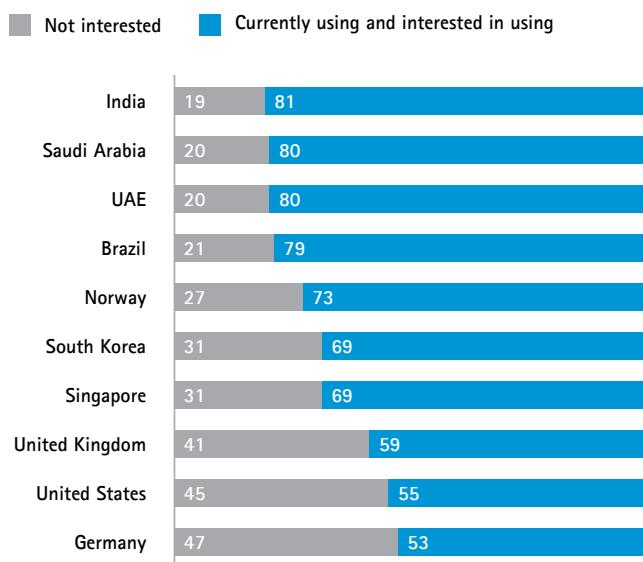
Countries in the Cutters category—the US and UK—ranked among the last three in using cloud computing or interested in using it for interacting with their governments. In fact, more than 30 percent of the surveyed citizens are not interested in using this technology in the future. One of the primary concerns of the surveyed citizens from the Cutters category is data security and privacy: specifically, how enterprise data is safeguarded in a shared third-party environment—also the reason why these countries have low rankings. There are, of course, some biases that may creep in to these results in countries where there have been heated discourses in popular media about topics such as privacy and security, at the back of major government debacles related to data loss or security breaches.

To make sure that services are customized to the needs of citizens, governments need to leverage big data and analytics as key enablers. A strong analytics capability helps identify the pain points in key public services, for instance revenue and taxation, to determine tax fraud or evasion. However, compared to the private sector, governments are proceeding with relative caution in

applying sophisticated analytics due to data privacy requirements, lack of interoperability, common standards and an agreed framework for cross-government working.

Figure 18: **Use of cloud computing in interactions with government departments**

We asked: Would you personally like to use cloud computing in the future when interacting with government departments offering public services?



Case Study: Emerging technologies that help fight crime

New and emerging technologies, such as social media and mobile apps, can be used to engage citizens, aid investigations and gather intelligence. The International Association of Chiefs of Police survey revealed that of the 92 percent agencies using social media, 77 percent use it for investigation and 74 percent reported it helped them solve crime within their jurisdictions. With 340,000 Twitter followers and almost three million YouTube videos, the National Spanish Police launched the Tweetredada program to engage citizens through targeted requests on various issues, including child pornography, gender violence and search for the most wanted.

Similarly, in the US, the Memphis Police Department uses multivariate analysis in crime mapping, using weather and school data, to predict where certain crimes may occur and to ensure that officers are best positioned at the right place, on the right day and at the right time. This initiative has resulted in a 23 percent decline in violent crimes and a 26 percent decline in property-related crimes.⁷

⁷Source: <http://www.accenture.com/SiteCollectionDocuments/PDF/Preparing-Police-Services-Future.pdf>

2.7 The future of public services: Are government employees ready?

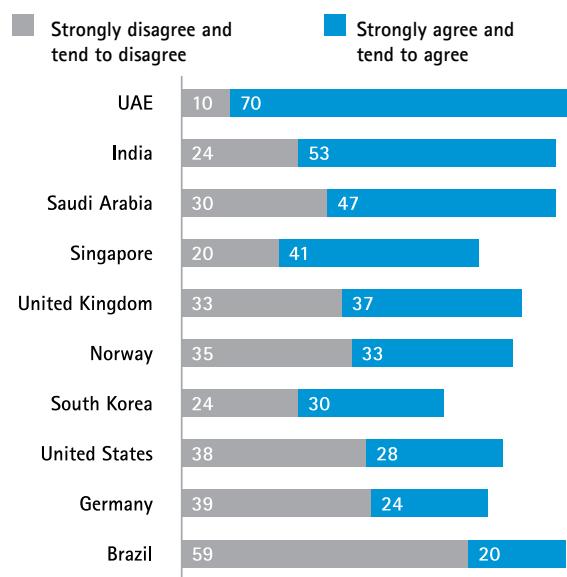
To deliver digital services efficiently and effectively, government employees must be equipped with the required education and skills. Generally, we found that citizens hesitate to place their complete trust in the skills of government employees, especially with their ability (or lack thereof) to respond quickly to future challenges. Even the most promising technology can fail to realize its business objectives when its intended users are poorly trained or resist change.

Just over a third (37 percent) of surveyed citizens feel strongly or tend to agree that people who work in public services have the skills and abilities needed to meet the challenges facing public services in the future. In the UAE and India, this percentage is considerably higher at 70 percent and 53 percent respectively (Figure 19). The UAE's high score is likely emanating from the Emirates Government Service Excellence Program that aims to standardize service quality, ensure consistency in customer experience across service centers and promote cost efficiency. Under the program, the centers that provide government services are rated on a Service Centre Assessment Program on a range of two to seven stars in eight key dimensions—strategic

alignment, customers, services, channels, customer experience, service efficiency and innovation, and people and technology. The program aims to make all federal services reach seven stars. It lays emphasis on training and upskilling government employees so that they can provide better public service (See the UAE country profile).

Figure 19: Perception of public employees' skills

We asked: Do you believe people who work in public services have the skills and abilities needed to meet the challenges facing public services in the future?



3. Citizen Service Experience

As discussed earlier, Citizen Service Experience has been measured through three key components—Citizen Satisfaction Survey, Service Maturity and Citizen Service Delivery Experience. We have already covered the Citizen Satisfaction Survey findings in the previous chapter. In this chapter, we evaluate the government's performance on Service Maturity and Citizen Service Delivery Experience across the 10 reference countries. This assessment was conducted for a range of federal or central government services, and did not consider e-services provided at state or local levels due to lack of consistent data.

3.1 Service Maturity

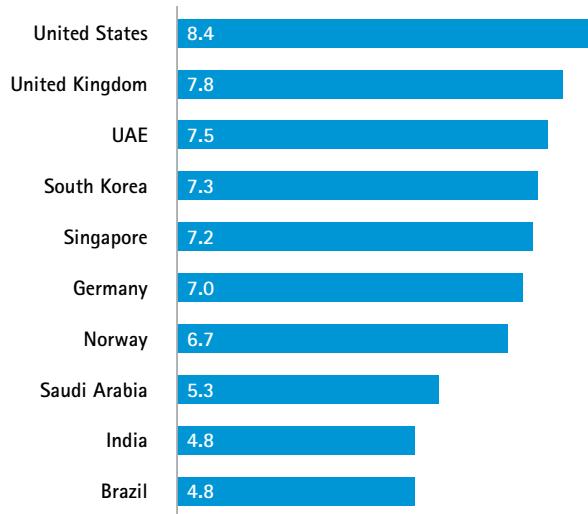
In our assessment of the Service Maturity of the 10 countries, we found that the two countries in the Cutters category—the US (8.4) and the UK (7.8)—lead the pack. The UAE (7.5), from the Builder category, ranked third due to its strong presence on the Internet across different central government services (Figure 20).

Category	Percentage
Cutters	40%
Builders	50%
Enhancers	10%

The other countries in the Builders category—Saudi Arabia (5.3), India (4.8) and Brazil (4.8)—are found in the bottom half. While Saudi Arabia has achieved a high level of maturity in online services, the country is yet to expand its presence into a wider range of central government public services. India and Brazil, on the other hand, need to support their plans for an efficient digital government with investments to build and promote their ICT infrastructure and access to majority of their citizens

Countries in the Enhancers category are clearly positioned in the middle of the order showing slight differences in the levels of maturity, which reveals that the differences in the quality of the service provided are based on varying citizen experiences rather than the sophistication of the services offered by governments.

Figure 20: Countries ranked in Service Maturity



3.2 Citizen Service Delivery Experience

This evaluates the extent to which governments provide a streamlined and integrated citizen experience. In general, each service can be scored in each pillar between 1 and 4. The pillars, their scoring classifications and relative weight with respect to citizen service delivery experience are:

Pillar	Weight
Citizen-centered interaction	40%
Cross-government service interaction	50%
Multichannel service delivery	10%

- **Citizen-centered interaction:** This pillar measures the extent to which the government creates a relevant personalized experience for the citizen by understanding who they are and anticipating their needs. (25 percent)
- **Cross-government service interaction:** This pillar measures the extent to which the boundaries of government agencies and departments are invisible to the citizen, and the extent to which the citizen can interact with multiple agencies across different jurisdictions in a seamless and transparent manner. (25 percent)
- **Multichannel service delivery:** This pillar measures the extent to which service delivery channels are integrated to deliver uniform information and a

consistent citizen experience in a comprehensive and timely manner. (25 percent)

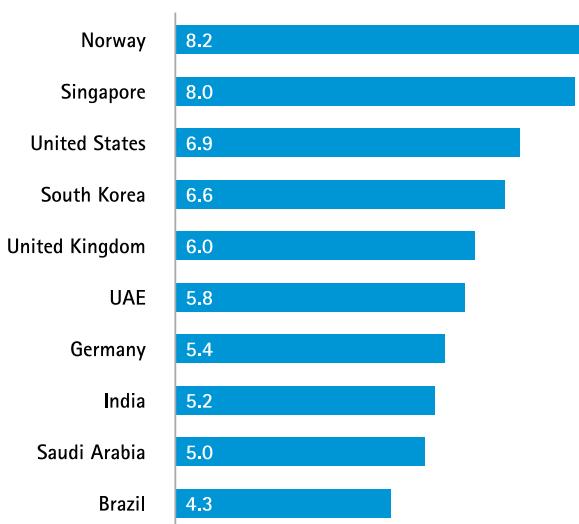
- Proactive communication and education: The purpose of this pillar is to address the extent to which the government actively informs and educates the citizen about current service offerings so that citizens can make the most of them. (15 percent)
- Social media: The purpose of this pillar is to reflect the level of expansion of social media and its use. (10 percent)

Citizen Service Delivery Experience rankings

Accenture found that classic club of leaders in the provision of digital government naturally occupy the top positions when evaluating the citizen service delivery experience. Norway, Singapore, the US, South Korea and the UK are the top five countries on this part of the ranking. The UAE emerges as the new member of the club, ranking above Germany (Figure 21), which is an impressive result and shows an element of leapfrogging in achieving maturity in the service delivery model.

The two leaders in the citizen service delivery experience rankings are also among the top four in terms of Citizen Satisfaction Survey. As we observed in the previous chapter, and as one would expect, there are strong linkages between countries providing a better service delivery experience to their citizens and their

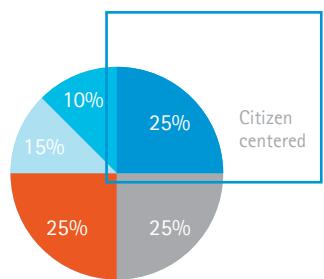
Figure 21: Countries ranked in Citizen Service Delivery Experience



satisfaction levels. The results highlight the importance of governments to become more responsive and agile toward their citizens while focusing on efficiencies in cost and operations. In Norway—that scored the highest on this ranking—the government's digital agenda places a lot of emphasis on achieving simplification and efficiency improvement, provide unified and user-friendly digital services including a single sign-on with necessary assistance to citizens that need support, to promote a sustainable and inclusive society.

3.2.1 Citizen-centered interaction

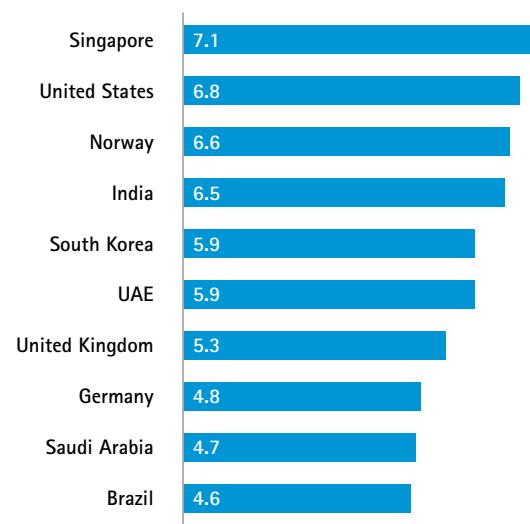
This crucial pillar of the citizen service delivery experience component measures the government



interactions that place citizens first—where the service and supporting information is organized around and with the citizen in mind. Typically, government frontline agents have access to this information and use it to tailor interactions to citizen's needs and circumstances.

Our research found that Singapore (7.1), the US (6.8) and Norway (6.6) are the leaders in citizen-centric interactions, while Germany (4.8), Saudi Arabia (4.7) and Brazil (4.6) rank lower than the average in the 10-country group (Figure 22).

Figure 22: Countries ranked in citizen-centered interaction



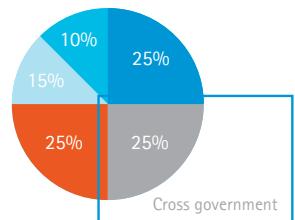
Case Study: Engaging citizens to secure their future

Singapore's Central Provident Fund (CPF) Board operates a comprehensive national social security savings plan that supports pensions, home loans and health insurance. Apart from retirement plans, it also offers savings plans for home owners, health care and more. The mission of the CPF Board is "to enable Singaporeans to save for a secure retirement," while its vision is to be "a world-class social security organization providing the best national savings scheme for Singaporeans to enjoy a secure retirement."

Further, to engage, educate and empower individuals who are less able to take advantage of online tools or who prefer face-to-face service, the CPF Board employs mobile customer service officers or m-ambassadors. The m-ambassadors may visit people in their homes if they have contacted the call center to report difficulties they face or if the board has identified them as being eligible for payments they have not claimed. Using the m-ambassador program, the board is delivering more equal outcomes by reaching out to deliver services, educate and empower traditionally hard-to-reach groups. The m-ambassador system enables the CPF Board to channel resources into meeting the needs of citizens who are least able to help themselves—allowing the organization to maximize the value of strategies designed to reduce the cost to serve those customers who are able to take advantage of online, self-service tools.⁸

3.2.2 Cross-government service interaction

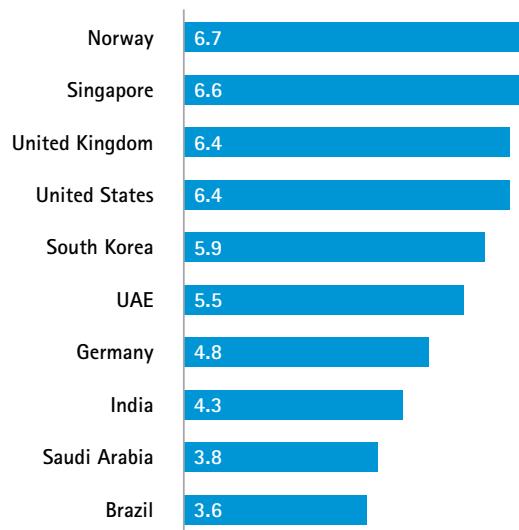
Facilitating and improving citizen experience by providing integrated services is vital for today's digital government. Countries that are leveraging the inter-linkages and synergies between government agencies working together at the local, regional and national levels are transforming the delivery of public service, improving governance processes, and driving efficiencies in services and reducing costs, while providing high-quality services to their citizens



Accenture found that countries in the Enhancers category—South Korea (7.0) and Singapore (7.0)—lead the pack, while Norway (6.1) and the UAE (5.7) are close behind (Figure 23). We observed that the leaders have a strong ICT prioritization, made early investments in digital channels and cloud-based technologies, and emphasis on cross-agency and private sector collaboration to maximize efficiencies.

Indeed, South Korea's Governmentwide Enterprise Architecture (GEA) has been assimilating cross-government services through an integrated platform to its citizens, businesses and government agencies. The platform has enabled savings of US\$240 million between 2009 and 2011, reduced business processes from 75 to 15 and cut processing time from four weeks to one week (See the South Korea country profile).

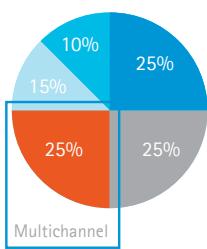
Figure 23: Countries ranked in cross-government service interaction



⁸Source: As stated on page 32 of <http://www.accenture.com/gb-en/Pages/insight-creating-shared-responsibility-better-outcomes.aspx>

3.2.3 Multichannel service delivery

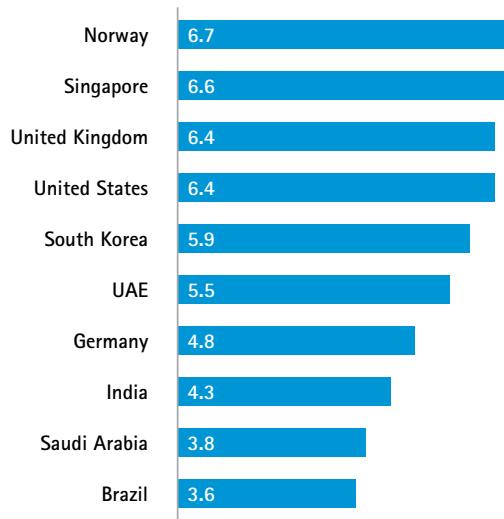
Multichannel service delivery measures the level of integration of the service across a range of delivery channels (for example, face to face, telephony and Web based) providing a streamlined and consistent citizen experience.



Norway (6.7) and Singapore (6.6), from the Enhancers category, are the leaders in the delivery of services through multichannel platforms, followed closely by both the countries in the Cutters category—the UK (6.4) and the US (6.4) (Figure 24). These leaders have successfully reorganized their public service governance models and processes into a citizen-centric approach that results in greater transparency, two-way interaction and a sense of confidence among their citizens.

For example, the Norwegian Labour and Welfare Administration (NAV), administers a third of the national budget through schemes such as unemployment benefit, work-assessment allowance, sickness benefit, pensions, child benefit and cash-for-care benefit. Citizens have the opportunity to interact with the agency and track the status of their cases through a range of service channels, including both traditional (in person, by phone) and new digital channels. There is a high degree of integration across the NAV databases that allow consistent entitlement checking and help in creating a single profile of their customers.⁹

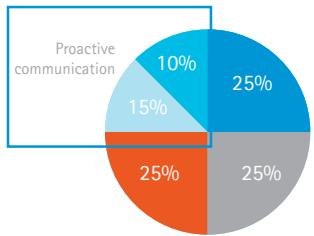
Figure 24: Countries ranked in multichannel service delivery



⁹Source: <https://www.nav.no/English/The+Norwegian+Labour+and+Welfare+Administration/Organization>

3.2.4 Proactive communication and education

To achieve effective public service outcomes, as well as in times where governments are taking some hard decisions on the service model, for example, moving a service to "Digital by Default," they must build and sustain active outreach and communication programs to ensure citizens are properly informed about their actions. Through proactive communication and education, governments provide citizens information designed to increase the adoption of government services through appropriate channels, and improve ease of use and strengthen compliance.



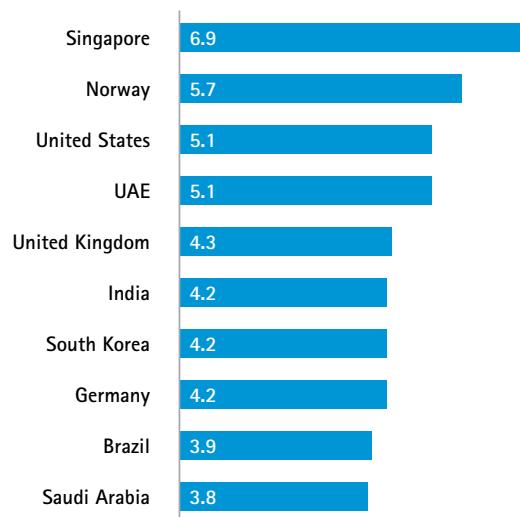
Accenture research found that Singapore is a clear leader (6.9) in proactively communicating and educating its citizens, followed by Norway (5.7), while the third place is jointly occupied by the US and the UAE (5.1) (Figure 25). Note that the top two ranks are occupied by countries in the Enhancers category, followed by Cutters and Builders. We noted that countries in this category have been widening e-engagement efforts through greater citizen consultation and feedback. The leaders such as Singapore and Norway are setting new standards in transparency and openness in government activities, for example finances and budgets as well as their performance on key services such as health, employment and education.

The Singapore government is also active in influencing its citizens' behavior by communicating compelling offers that drive citizens to interact with them more efficiently and extract greater value from the services they receive. Institutionally, the government has clearly imbibed proactive communication and education through the Public Communications Division that provides ministries with customized communication support, and analyzes and addresses public communications issues proactively. In the digital space, most of the government agencies help create awareness about the services and benefits citizens have available to them, including from the government portal. Lastly, the government has developed a holistic strategy to seek feedback from its citizens by creating a common platform for providing online feedback, such as the one under the REACH initiative. Many agencies

are now using popular social media channels—Facebook and Twitter—to garner feedback and seek ideas from citizens.¹⁰

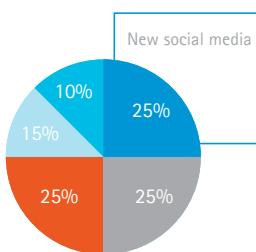
From the Builders category, the UAE ranked fourth (5.1) has also developed a single digital point of contact for feedback—Mygov.ae—denominated as the UAE Federal Feedback Gateway. Citizens, businesses, public employees and other customers are encouraged to actively use the tool to share their suggestions, administrative and executive remarks, and compliments and gratitude (See the UAE country profile).

Figure 25: Countries ranked in proactive communication and education



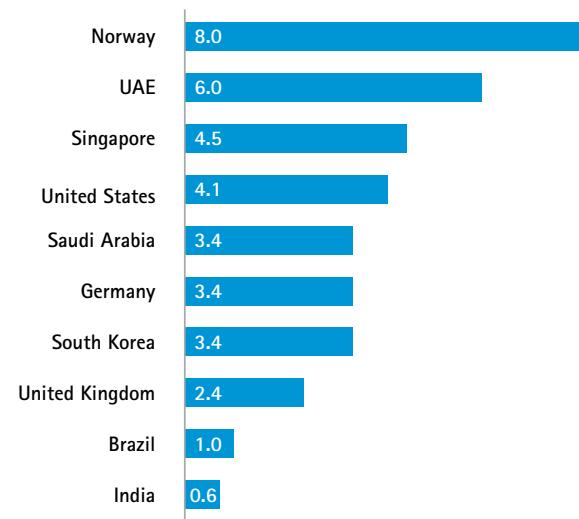
3.2.5 Comprehensive and updated use of new social media channels

New social media channels and technological changes represent a fresh set of challenges for countries that aspire to leverage this new paradigm in communicating with its citizens. Governments around the world recognize the advantages of using new channels to improve the quality of their interactions to get closer to their citizens.



We found that Norway (8.0) and the UAE (6.0) have established a wide and extensive presence in the social media environment, while Brazil and India, from the Builders category, are behind in adopting and using new channels available to them (Figure 26).

Figure 26: Countries ranked in use of new social media



Incidentally, the UAE is sharing a complete directory of social media presence of the different federal government agencies with its citizens and residents, and has fully integrated social media in the process of gathering complaints, by encouraging citizens to provide feedback using Facebook, Twitter, YouTube and Flickr at <http://government.ae/en/web/guest/complaint-and-suggestion>. Initiatives such as these are enabling the UAE government to remain deeply connected to its citizens.

¹⁰Source: As stated in the Overview and About sections of <https://www.reach.gov.sg/default.aspx>; http://app.sgdi.gov.sg/listing.asp?agency_subtype=dept&agency_id=0000022151; and <http://www.gov.sg/>

4. Progressing on the Digital Journey

Governments across the world are warming up to a new realization that embracing digitalization is at the heart of achieving public reform and transformation. These service transformation programs, powered by digital technologies and strategic use of government ICT assets, can help achieve a range of positive outcomes—constituent satisfaction, citizen engagement, economic competitiveness and government productivity. Leaders in public service must set a new path toward digital maturity of their governments and make the right long-term investments to deliver public services for the new digital citizen.

Through this research, Accenture seeks to help countries to not only understand where they may be today in terms of their Service Maturity, Citizen Service Delivery Experience, and in meeting overall citizen satisfaction levels, but also offers a "future-scope" on how different countries, based on their economic and social context, are progressing toward digital maturity and high-performing government.

Additionally, our comprehensive analysis of individual countries can help public sector leaders analyze specific trends to gain insights of real value to inspire them further on their digital journey.

The path forward

What could be the strategies and actions that countries in the Cutters, Builders and Enhancers categories might implement to rapidly progress on their digital journey? Our research reveals that countries are in the process of building these strategies and actions on the basis of their own digital maturity levels and in the backdrop of the current experiences of their citizens and future expectations. Countries in the Builders category, for instance, are graduating from developing the basics to promoting mass adoption of digitalization in the longer term. Similarly, countries in the Cutters category focus on cost efficiencies and adopt a "Digital by Default" approach that leads to i-government (a government

that is innovative, insight driven and Internet ready). The Enhancers category, which are already advanced on citizen engagement, are looking at creating a more open or networked government that encourages the creation of a digital society. Below, we summarize some of our overall findings by country category and chart a path to progressively build on a digital government and society.

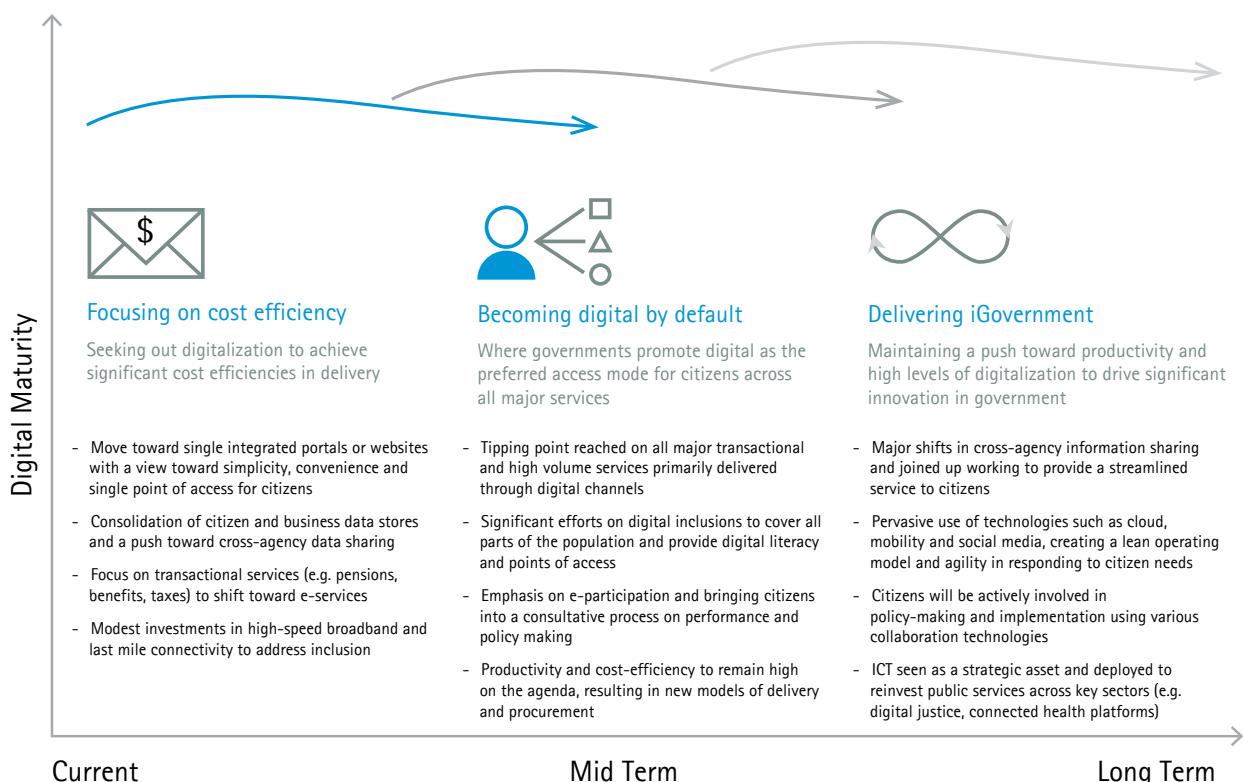
The Cutters' digital journey: The US and UK are ahead of the pack in terms of Service Maturity, but, with some of the lowest scores in the Citizen Satisfaction Survey, which could be the result of focusing too much on driving cost efficiencies and better management of their ICT assets.

In the near term, Cutters will continue to accelerate on their cost-efficiencies agenda in delivery through a simple, convenient single point of access for citizens, such as integrated portals and websites, shut-down of several redundant or duplicative government websites, reducing cost of ownership and management of their ICT infrastructure, and shifting high-volume transactional services, such as pensions and taxes, toward e-Services.

In the mid term, Cutters could move toward "Digital by Default" promoting digital as the preferred access mode for citizens across all major services and making significant efforts toward digital inclusion, digital literacy and points of access.

In the long term, they could be moving to paradigm of i-government by maintaining its push toward productivity while driving significant innovation in government. They could leverage technologies, such as cloud, mobility and social media, to create a lean operating model and help gain the agility to respond swiftly to citizens' needs as well as actively involve citizens in policymaking and design of public services. Finally, governments in Cutters countries would need to deploy ICT strategically to reinvent public services, such as digital justice, employment, education and connected health platforms (Figure 27).

Figure 27: Cutters' digital maturity journey



The Builders' digital journey: We find the countries in the Builders category—UAE and Saudi Arabia—lead across the 10 countries in terms of Citizen Satisfaction Survey. Governments here have placed high priority on digital and have aligned their digital strategy with their broader plans to drive economic competitiveness and increase public sector efficiency. These two countries have scored low in terms of their Citizen Service Delivery Experience, but their overall scores have been lifted by citizens' optimism meeting future needs.

In India and Brazil, citizen expectations hinge on addressing significant opportunities for improvement in Service Maturity and Citizen Service Experience. Citizens in Brazil are keen to be more involved in shaping public service to help improve the government plans to execute. However, what is encouraging is that in three of our Builders—UAE, Saudi Arabia and India—citizens are optimistic about public services in the future and show greater confidence in their government's ability to improve quality of services based on steady progress over the past.

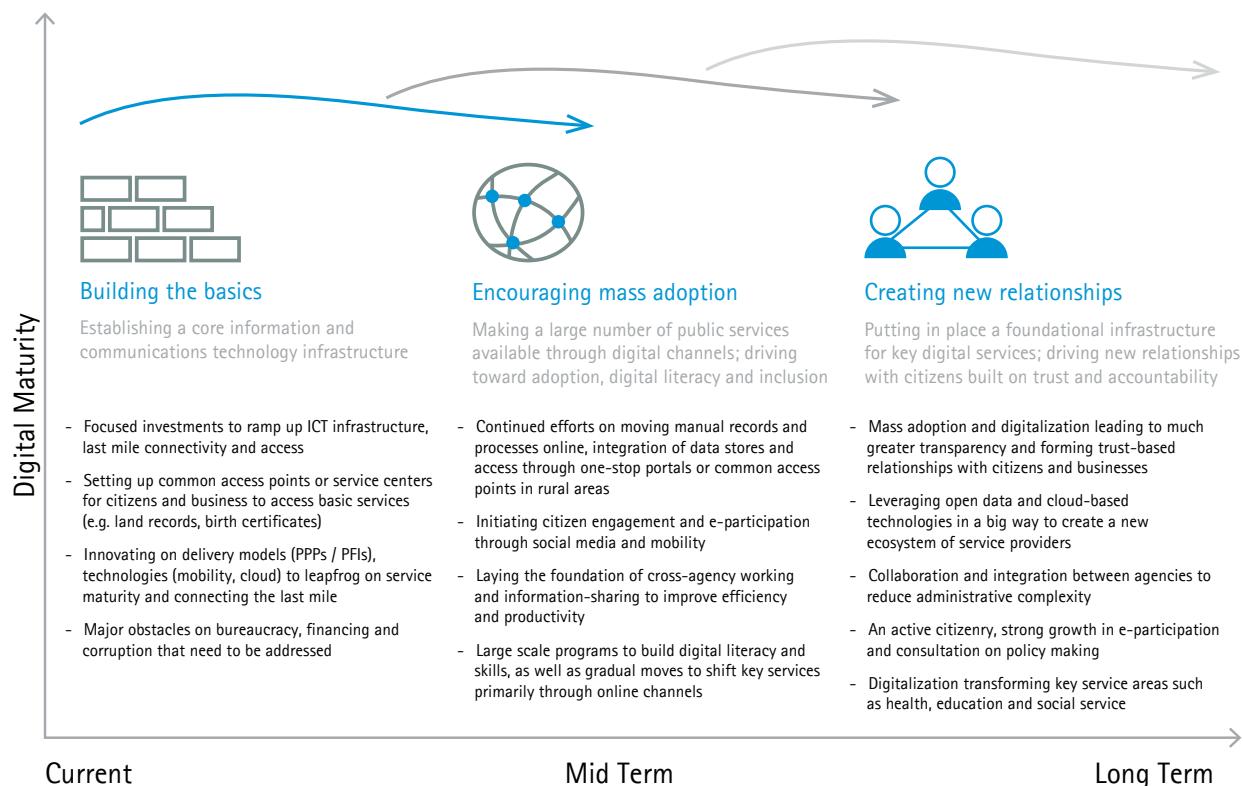
In the near term, countries in the Builders category are focusing on the basics—establishing a core ICT infrastructure and improving accessibility through

common access points or service centers for citizens and businesses to access basic services, such as land records, health, and education (as in India), while increasing transparency and cutting red tape. They would need to innovate delivery models including public-private partnerships and leverage technologies such as mobility, social media and cloud computing.

In the mid term, Builders need to consider encouraging mass adoption by continuing to move manual records and processes online, integrating data stores and offering access through one-stop portals. They could also initiate citizen engagement and e-participation through social media and mobile platforms, and develop large-scale programs to build digital literacy and skills.

In the long term, countries in the Builders category could consider creating new trust-based relationships with citizens and businesses through greater transparency and accountability by putting in place a foundational infrastructure for key digital services. They could leapfrog Service Maturity by fully exploiting open data and cloud-based technologies, creating a new ecosystem of service providers, and use digitalization to transform key service areas, such as health, education and social services (Figure 28).

Figure 28: Builders' digital maturity journey



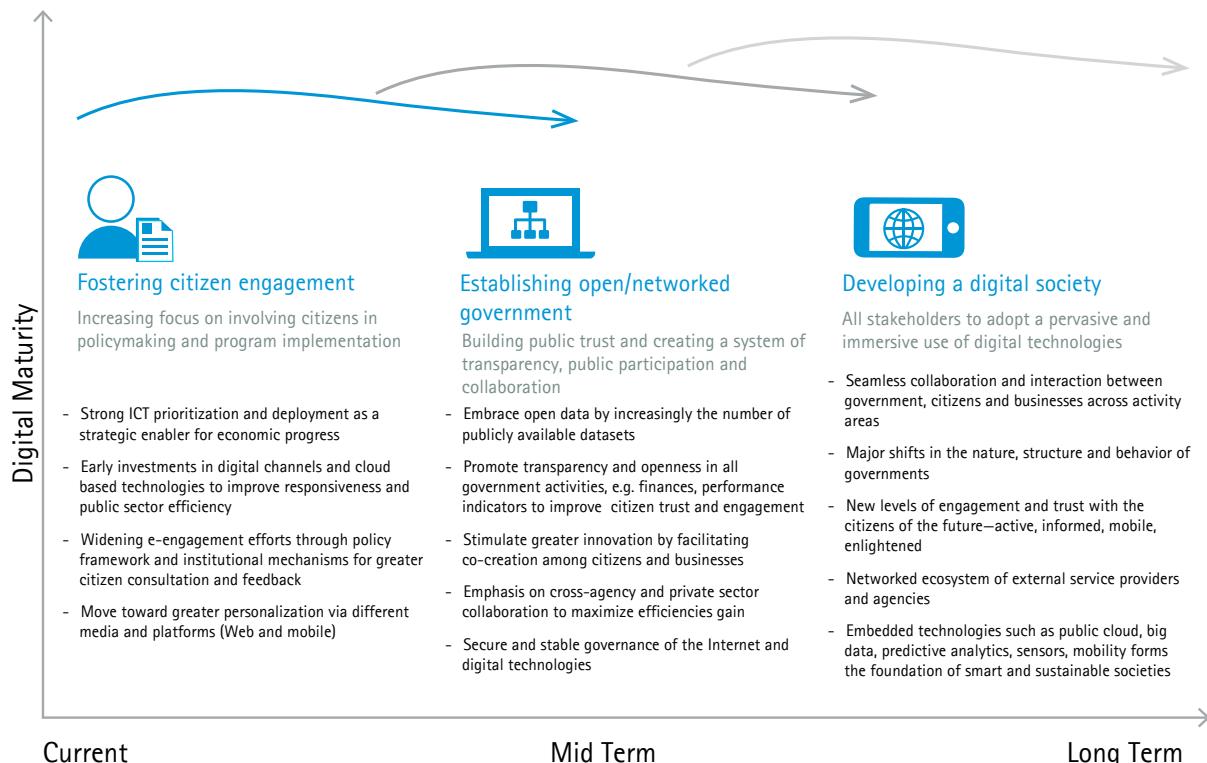
The Enhancers' digital journey: The countries in the Enhancers category—Singapore and Norway—emerge as clear leaders in digital government service, while South Korea and Germany, despite performing well on other parameters of digital readiness, have fallen behind mainly because there is perception that they have neglected citizens' needs, and not been actively communicating their intent in key service transformation programs. In the short term, countries in the Enhancers category are enhancing citizen engagement by involving them in consultative processes in policymaking and service delivery. They are also continuing to invest in digital channels and cloud-based technologies to deploy digital as a strategic enabler for economic progress, competitiveness and moving toward greater personalization via Web and mobile platforms.

In the mid term, countries in the Enhancers category would need to consider establishing open/networked government by creating a system of transparency, public participation and collaboration, and embrace open data in a majority of government services, where this doesn't impinge on privacy and security. There will also be a

focus on cross-government collaboration as well as involving the private and third sectors in the service model.

In the long term, countries in the Enhancers category may take stride toward developing a digital society, establishing new models of seamless collaboration and interaction between government, citizens and businesses. They could employ a networked ecosystem of external service providers and agencies, and make use of embedded technologies—such as the G-cloud, big data, predictive analytics and mobility—as the foundation of smart and sustainable societies (Figure 29).

Figure 29: Enhancers' digital maturity journey



5. Digital Maturity: Country Profiles

This chapter aims to provide an overview of the digital strategy and approach, and major case studies for the 10 countries. It also provides key insights into the country-specific results for Citizen Service Experience and Citizen Satisfaction Survey.

UK



Ranking 7 | Digital Maturity Level |
Latitude/Longitude 54°N/2°W | Capital
London | Population 63.8 million | Land
area 241,930 square kilometer | GDP per
capita US\$37,456



Digital strategy and approach: Moving toward "Digital by Default"

The UK's digital strategy follows a key tenet—"Digital by Default", which means all major transactional services will be delivered through digital channels.

The UK government is clearly embracing a strong digital strategy with the objective of creating world-class, citizen-centric services while driving efficiency gains and economic progress. The government has established the Government Digital Service (GDS), a new

team within its Cabinet Office, responsible for scaling up the digital services provided to citizens. Defined by a robust implementation road map and key performance indicators, the digital strategy contains 16 actions the government will take to become "Digital by Default." Rebecca Kemp, policy team leader at GDS, explains "Digital by Default" as "everyone who chooses to do it digitally can do it that way and everyone who can't do it digitally is not excluded."¹¹

The UK government is looking at making digital information and transactional services more convenient and user friendly by using one Web address. GOV.UK has replaced Directgov and Businesslink.gov.uk as a single domain for government on the Web. GOV.UK has demonstrated how these methodologies can deliver high-quality digital products that meet citizens' needs, and are more efficient for government. In large-scale user testing conducted by GDS, 93 percent of users rated GOV.UK as very or quite easy to use versus 75 percent for Directgov. Similarly, when looking for information,

¹¹Source: <https://gds.blog.gov.uk/>, <https://www.gov.uk/government/publications/government-digital-strategy/government-digital-strategy>, <https://gds.blog.gov.uk/author/rebeccakempgds/>

respondents using GOV.UK took an average of 80 seconds as opposed to 120 seconds on Directgov.

Moving transactional services to digital channels will save US\$2.7–2.9 billion a year.

As transactional services present the biggest opportunity to save citizens' time and government's money, its digital strategy strongly focuses on making services—such as welfare applications,

tax, licensing and payments—more convenient. In fact, the Society of Information Technology Management's 2012 study across 120 local councils estimated that the cost of contact for face-to-face transactions averages US\$13.84, for telephone US\$4.54, but for the Web only US\$0.24. This is further supported by the government's 2012 Digital Efficiency Report, which found that the average cost of a central government digital transaction can be 20 times lower than the cost of telephone and 50 times lower than face-to-face interactions.¹²

The UK government now estimates that moving these transactional services from offline to digital channels will save US\$2.7–2.9 billion a year. Of this, US\$1.8–2.1 billion will be saved directly by the government and the rest will be passed on to the users through low-cost services.

It is important to note that the UK, which ranked fourth in online services delivery in the United Nations E-Government Survey 2012, is strongly focused on increasing the scale and quality of online government services. However, it does need to focus on spending public funds appropriately and fostering technological innovation. To achieve digital excellence, the government is addressing some operational challenges, including:

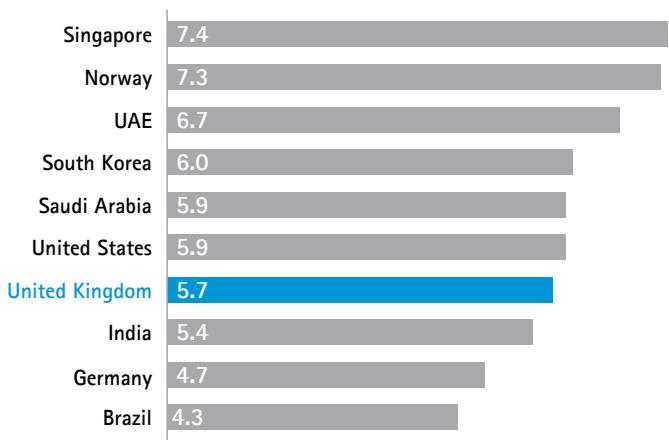
- Data privacy and security: The government bodies need to trust their constituents more and not require citizens or businesses to provide the same information repeatedly. The government aims to provide a secure, trusted environment to users to carry out their transactions.

- Digital inclusion: More than nine million UK residents have been assessed as digitally excluded, which means they do not use the Internet. The government wants to ensure that even the remote and marginalized citizens are easily managed in the transition to digital to realize its vision of "Digital by Default".

Digital government performance

The UK ranked seventh overall in digital government performance (Figure 30).

Figure 30: UK overall ranking



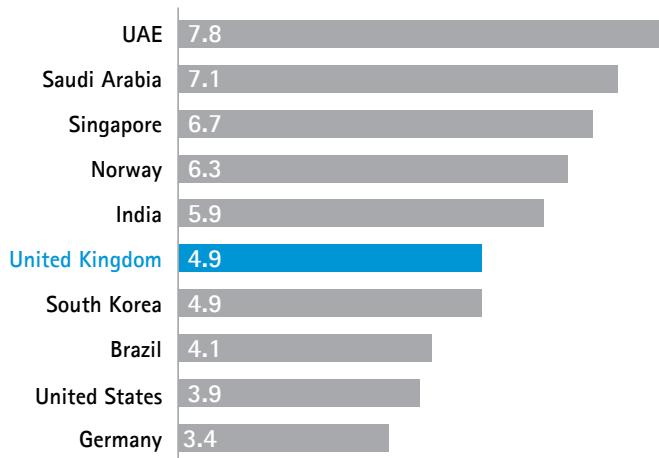
As one of the most experienced countries in developing digital government services, the UK government provides many online services, with a lot of them having reached high maturity in interactive and transactional levels.

In Citizen Service Delivery Experience, the UK government performed consistently across different pillars, specifically in multichannel service delivery. However, there is scope for improvement especially in the area of citizen-centered interaction, proactive communication with citizens, and presence and use of social media tools.

A mid-level rank in the Citizen Satisfaction Survey reduced UK's overall score (Figure 31). Only 44 percent of the surveyed citizens are confident of the government's ability to address their need for better public services in the future. We also found that more than 75 percent of the surveyed citizens strongly feel that they should be more involved in shaping how public services are designed and delivered.

¹²Source: <https://www.gov.uk/government/publications/government-digital-strategy/government-digital-strategy>

Figure 31: UK Citizen Satisfaction Survey



These results directly correlate with the top priorities expressed by the UK citizens for improving future public services:

- **Plan for the long term, not just the next few years (43 percent).** Citizens feel that long-term planning, and appropriate communication and rollout of digital services would help increase their confidence in the government's actions.
- **Provide services in a more cost-effective manner (35 percent).** Citizens want the government to continue its focus on productivity and cost-efficiency while delivering high-quality services.
- **Understand better the priorities of citizens and communities (34 percent).** Citizens want the government to address their needs and go beyond pure online participation mechanism to enhance the way it provides public services.

While these three expectations are part of the UK government's digital strategy, they are not yet provided at the desired level. By keeping citizens' needs at the heart of the process, it is looking at designing digital services that offer greater efficiency and accuracy at a lower cost, while simultaneously improving citizen experience.

Current achievements

Tell Us Once

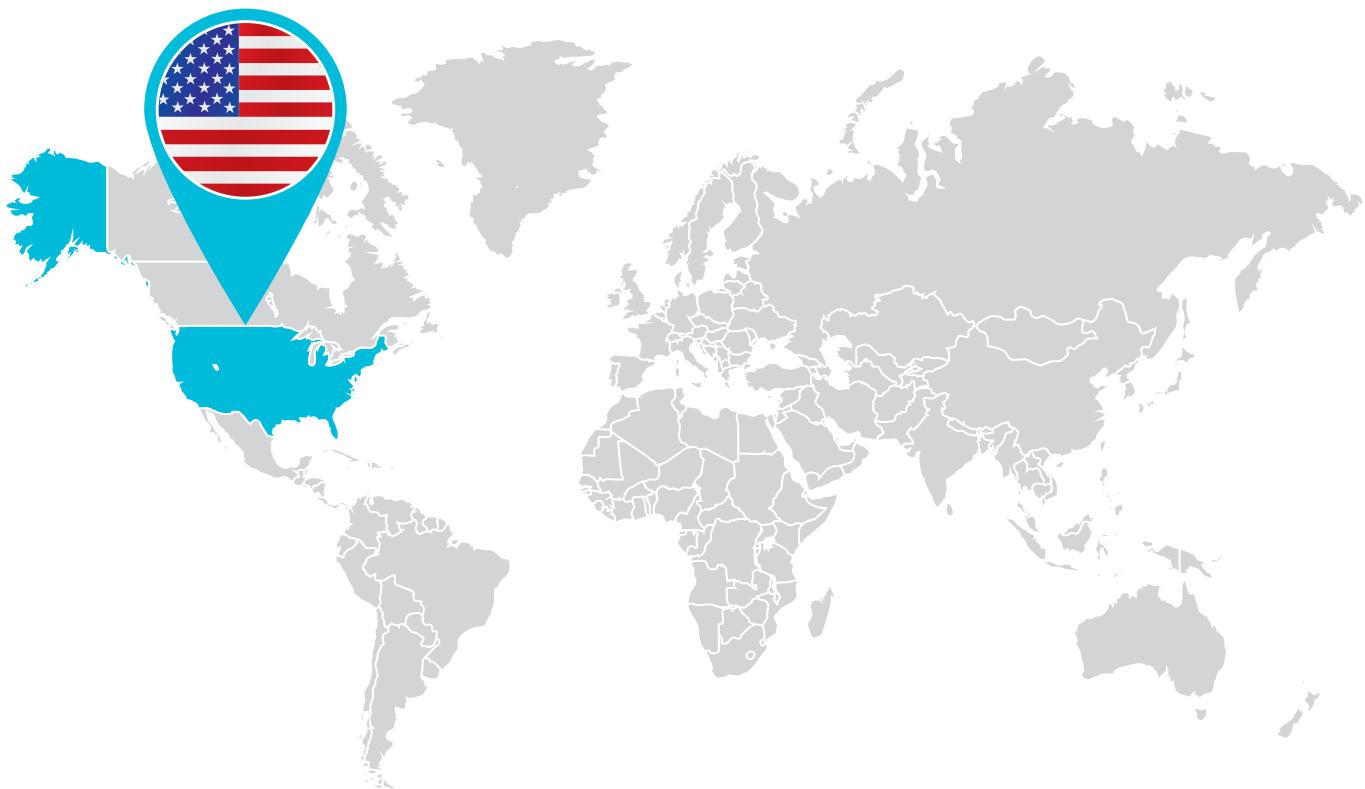
The UK government has already taken large strides in improving its public services. For example, it has implemented "Tell Us Once," a cross-government program that allows citizens to report a birth or death to the central government and local authorities—such as the Department for Work and Pensions and the Driver and Vehicle Licensing Agency—through a single point of contact. The central government adopted an integrated approach to improve overall service delivery associated with this program. It partnered with local government authorities to deliver the service better and allowed them to opt for the service, decide when to start it, and brand and market it as they saw fit.

The program has seen high levels of adoption—96 percent of local authorities have opted for it and there has been strong collaboration between central and local government bodies.

Ninety six percent of local authorities have opted for the Tell Us Once program. Over the next 10 years, it is expected to save US\$302 million for the government and US\$104 million for the citizens.

The program has significantly reduced the complexity of citizens' interaction with the government. For example, earlier, citizens had to make up to 44 contacts when reporting a death to government bodies and local authorities. In September 2011, 70 percent citizens opted for the bereavement service and 90 percent opted for the birth service. As a result of this program, the government estimates major cost savings over the next 10 years: US\$302 million for central and local governments, and US\$104 million for the citizens.¹³

¹³Source: <http://central-government.governmentcomputing.com/features/2011/dec/16/tell-us-once-matt-briggs>, <https://www.gov.uk/tell-us-once>



Ranking 6 | Digital Maturity Level |
 Latitude/Longitude 38°N/97°W | Capital
 Washington D.C. | Population 317 million
 | Land area 9,161,966 square kilometer |
 GDP per capita US\$51,749

Digital strategy and approach: Building a digital platform for better service delivery

The US digital government strategy is built on four overarching principles of information centricity, shared platforms, customer centricity, and security and privacy.

Digitalization is not just about providing services through digital channels. When adopted at scale, it has the potential to deliver numerous benefits to the business, economy and society. Keeping this in mind, the US digital government strategy is built on four overarching principles:



- An information-centric approach: Shift from managing documents to managing open data and content that can be tagged, shared, secured and presented in a useful way for citizen consumption.
- A shared-platform approach: Work together—both within and across agencies—to reduce costs, streamline development, and ensure consistency in creating and delivering information.
- A customer-centric approach: Influence how to create, manage and present data through websites, mobile applications, raw data sets and other modes of delivery; allow citizens to shape, share and consume information, whenever and however they want it.

- A platform of security and privacy: Ensure secure delivery and use of digital services to protect information and privacy.

The US government's digital strategy seeks to accomplish three key goals in the long term:

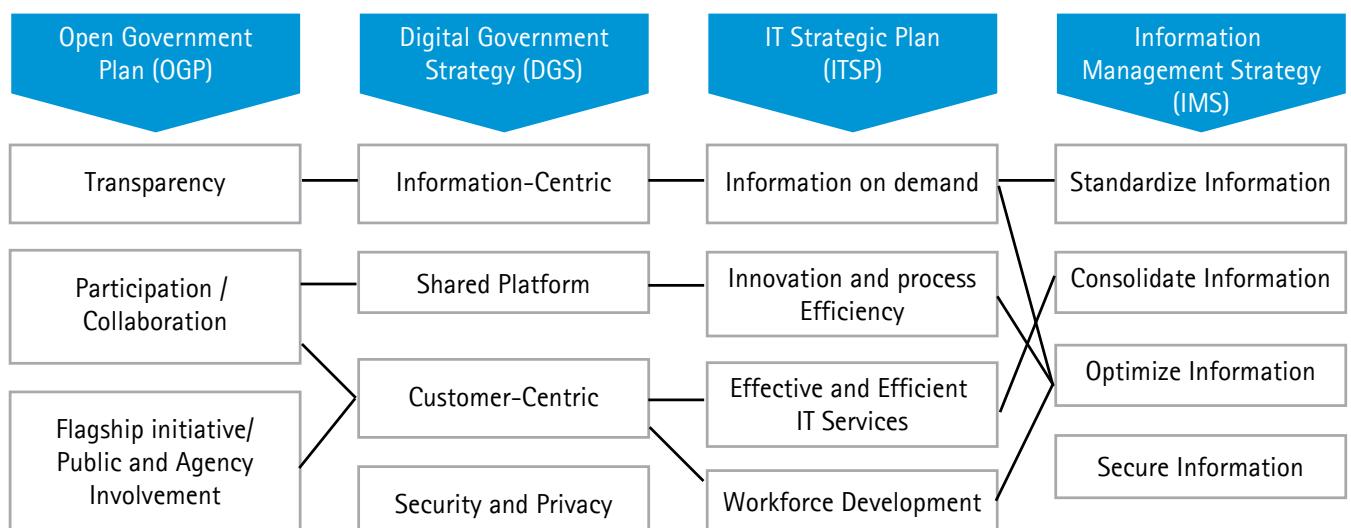
- Enable the citizens and increasingly mobile workforce to access high-quality digital government information and services anywhere, anytime, on any device. This means the government will operationalize an information-centric model, architect systems for interoperability and openness, modernize content publication model, and deliver better, device-agnostic digital services at a lower cost.

- Ensure that as the government adjusts to the new digital world, it will seize the opportunity to procure and manage devices, applications, and data in smart, secure and affordable ways. The government will do away with the inefficient, costly and fragmented practices, build a sound governance structure for digital services, and focus on mobile solutions.

- Unlock the power of government data to spur innovation across the country and improve the quality of services. The government will enable the public, entrepreneurs and government programs to better leverage federal data and ensure that data is open and machine-readable by default.¹⁴

The government has already linked its digital strategy with its information management, IT and open government plans (Figure 32).¹⁵

Figure 32: US—Alignment between the Information Management Strategy, IT Strategic Plan, Digital Government Strategy and Open Government Plan



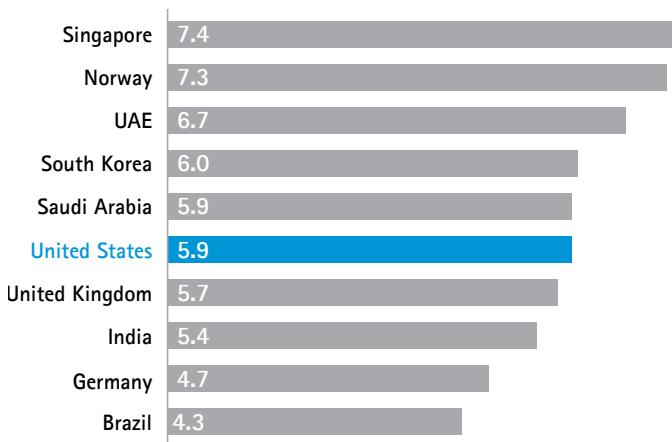
¹⁴Source: <http://www.whitehouse.gov/sites/default/files/omb/egov/digital-government/digital-government.html>

¹⁵Source: <http://www.usaid.gov/digitalstrategy>

Digital government performance

The US ranked sixth overall in digital government performance (Figure 33).

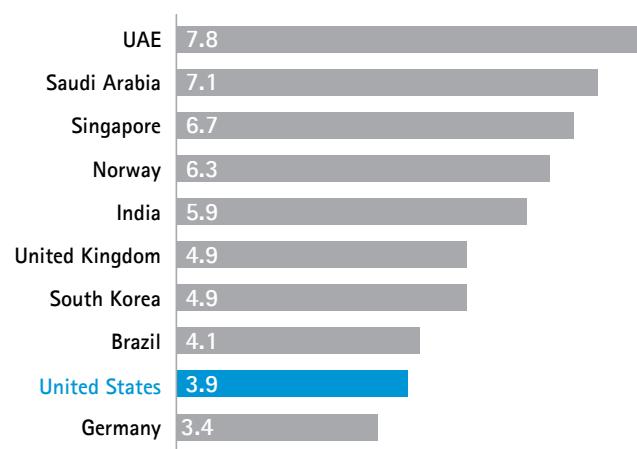
Figure 33: US overall ranking



The US is one of the most experienced countries in the development of digital government services. In Citizen Service Experience, the US government performed very well in most of the pillars, including service maturity, multichannel service delivery, citizen-centered interaction, and proactive communication and education. However, we found that the government does not perform that well in cross-government service interaction.

Despite investing heavily in digital technologies, the Citizen Satisfaction Survey revealed that US citizens have very low levels of satisfaction and confidence in the government's ability to deliver public services that meet their needs and expectations in the future (Figure 34). Factors such as many segments of the population feeling uncomfortable to adopt new technologies (mobile and cloud computing) to interact with the administration and the current low usage of digital government services also contributed to the country's low ranking on citizen satisfaction.

Figure 34: US Citizen Satisfaction Survey



These results have some correlation with the top priorities expressed by the US citizens for improvement in future public services:

- **Provide services in a more cost-effective manner (44 percent).** Citizens want the government to make the digitalization process sustainable and productive. Our research found that the government is perceived as not managing public funds well. It ranked seventy-sixth out of 144 countries on control of wastefulness of public spending score in the WEF's Global Competitiveness Index 2012–13.
- **Plan for the long term, not just the next few years (43 percent).** Citizens want a clear and stable vision of government services and they will be provided to them. This is closely linked with need for sustainable public services.
- **Understand better the priorities of citizens and communities (33 percent).** Citizen centricity is not enough for a country with a mature and educated digital population. More than 75 percent surveyed citizens want to collaborate with the government for designing future public services so their needs are better addressed.

The US government has a strong digital government plan in place. The country is looking at investing in advanced digitalization while driving cost efficiencies and promoting acceptance of the new digital administration among its citizens.

Current achievements

Internal Revenue Service (IRS) E-services

Of the total 147.6 million returns filed in September 2012, 113.8 million were done online.

Under this program, the government provides a range of online services to taxpayers to improve voluntary compliance and reduce tax gaps. The government has taken the initiative to extend the reach of tax information and communications

through other channels such as social media to ensure maximum coverage. The IRS website's Interactive Tax Assistant page provides citizens answers to all tax law queries and receives millions of visits. Another example is its Offshore Voluntary Disclosure program that enables offshore compliance to avoid criminal prosecution.

The government has also deployed advanced information technology systems, processes and tools to increase efficiency and productivity. IRS's Customer Account Data Engine 2 has modernized the processing of citizens' tax accounts to an e-filing capability feeding into a consolidated database from the former paper posting system.

The government launched several initiatives to make this program a success:

In the first half of 2012, the IRS prevented the issuance of US\$4.2 billion of potentially fraudulent refunds.

Smartphone app IRS2Go, released in February 2012, enables citizens to request and track their tax returns and account statements.

Virtual Service Delivery (VSD), piloted in October 2011, provides face-to-face interaction through

video technology with 16,000 taxpayers at 15 IRS

locations (92 percent users are willing to use it in the future).

In the first half of 2012, the IRS prevented the issuance of US\$4.2 billion of potentially fraudulent refunds, which encompassed 860,000 returns that were indicative of identity theft. The government is using this information to improve communications, analyze trends, spot anomalies and detect potential fraud.

Measurable outcomes: Through September 2012, taxpayers used the IRS.gov website 1.7 billion times; 347 million tax products were downloaded in fiscal 2012 (up 51 percent from fiscal 2011); 113.8 million of the total 147.6 million returns filed in September 2012 were online; 6.2 million application requests received from IRS2Go since February 2012; and US\$2.1 trillion received in electronic tax payments.¹⁶

Mobile Apps Gallery

A part of the federal government's 2012 digital strategy was to more easily deliver information and services across multiple channels. It launched an online gallery for mobile websites and 140 free apps available on iOS and Android platforms, and in Spanish language. Categories include news, finance, education, health and fitness, utilities, reference, travel and others.

Mobile Apps Gallery showcases mobile websites and 140 free apps. Its PTSD Coach app has been downloaded 100,000 times in 75 countries since its launch in 2011.

A case study under this initiative is the Department of Veteran's Affairs PTSD Coach mobile app, which was released in May 2011. This app, developed with feedback from veterans and experts for an optimal user experience, helps veterans and military personnel suffering symptoms of posttraumatic stress

disorder (PTSD) by providing immediate accessible help and treatment while maintaining the user's anonymity. International governments have shown interest in adopting the app, and it has been downloaded 100,000 times in 75 countries since its launch.¹⁷

¹⁶ Source: <http://www.irs.gov/>

¹⁷ Source: <http://apps.usa.gov/>

Brazil



Ranking 10 | Digital Maturity Level

Latitude/Longitude 10°S/55°W |

Capital Brasília |

Population 200.4 million | Land area

8,459,417 square kilometer | GDP per

capita US\$11,716



Digital strategy and approach: Transforming public sector relationships with citizens and businesses

Brazil's e-government policy is driven by a set of guidelines to increase citizen centricity, improve internal management, and integrate with partners and suppliers.

Brazil's e-government program aims to improve the quality of services, encourage interaction with corporations and industries, and strengthen citizen participation through access to information and more efficient administration. Its e-government policy is driven by a set of guidelines along three key fronts:

- Citizen centricity
- Improving internal management
- Integration with partners and suppliers

The commitment to digital strategy can clearly be seen in Brazil's e-government plan, which covers digital inclusion, extensive websites and e-services management, free software implementation, and knowledge management and strategic information for the public. The government is also strongly focused on building a robust infrastructure network and connecting all government bodies through digital channels. For example, the government has set certain standards for all government websites:

- Web standards: Establish a flow of creation, development and maintenance in the management of government websites
- Interoperability standards: Define a set of policies and specifications for interaction with other government bodies and the society
- Accessibility standards: Outline a set of recommendations to be considered for providing easy access to government websites

The Brazilian government is making an effort to use social media to communicate with its citizens. For example, the twitter handle @egovbr has 32,925 followers, @TrabalhoGovBr has 193,308 followers and @minsaude has 246,470 followers as on January 13, 2014.

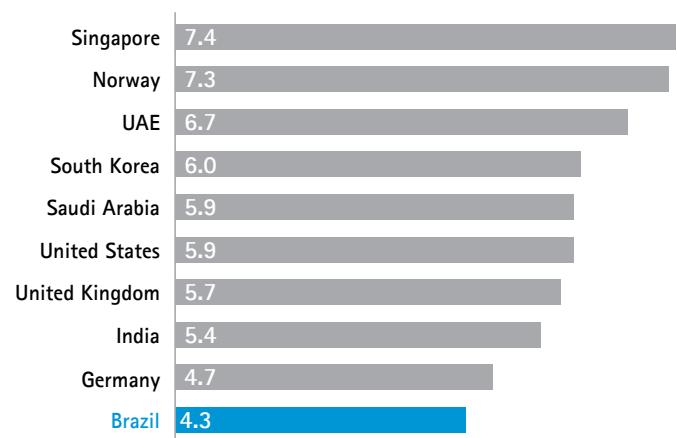
The government is also committed to open data and transparency, and has already set up the Transparency Portal of the Federal Government.¹⁸ This portal aims to increase transparency in public management, allowing citizens to track how public money is being used. Citizens can search for information and submit their queries to know more about the application of federal resources and contribute to the government in their role of monitoring agents.

The Brazilian government is ready to leverage IT to improve its administration and enhance interaction with citizens. In fact, for its e-government program, Brazil has set up an executive committee and eight technical committees responsible for the development of policies and actions for the federal public administration.¹⁹

Digital government performance

Brazil ranked tenth overall in digital government performance (Figure 35).

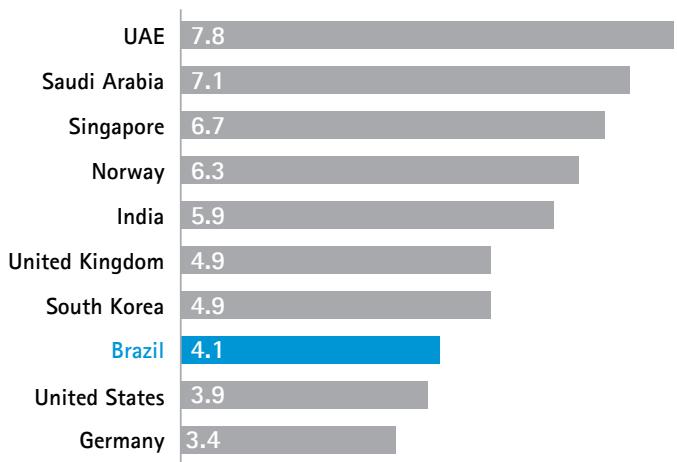
Figure 35: Brazil overall ranking



Brazil has a long way to go in Citizen Service Experience. The government performed the lowest in almost all pillars—proactive communication and education, use of social media, multichannel service delivery, and cross-government service and citizen-centered interaction.

The Citizen Satisfaction Survey revealed that citizens are very less satisfied with the public services offered through digital channels and not very confident in the government's ability to provide better public services in the future (Figure 36).

Figure 36: Brazil Citizen Satisfaction Survey



¹⁸Source: <http://www.portaltransparencia.gov.br/>

¹⁹Source: <http://www.governoeletronico.gov.br/%20-%20Social%20media%20accounts%20from%20Brazilian%20Government>

These results directly correlate with the top priorities expressed by Brazilians for improvement in future public services:

- **Understand better the priorities of citizens and communities (51 percent).** Citizens want the government to understand their needs better and address them by providing customized services. We found that 81 percent of the surveyed citizens feel it is important for the government to provide more services through digital channels in the future.
- **Improve the skills of people who work in public services (33 percent).** Citizens want public sector employees to be better equipped and trained to meet the challenges of public services in the future. Only 20 percent of the surveyed citizens believe that the employees have enough skills and, thus, this could be a strong transformational area in the government's digitalization journey.
- **Involve citizens in how public services should work (32 percent).** Citizens want the government to increase their role in the design and delivery of public services. Nearly 75 percent of the surveyed citizens feel that they should be more involved in shaping how public services are designed and delivered.

Brazil aims to achieve its e-governance goals by offering more public services through wider digital channels and driving toward mass adoption, digital literacy and inclusion. It is also looking at increasing the use of social media to improve the interaction between government and citizens, and involving businesses in decision making so that they become equally responsible in policy development.

Current achievements

Brazil National Portal

MeuBrasil (My Brazil) is a feature on the Brazil National Portal that allows users to customize content as per their preference.

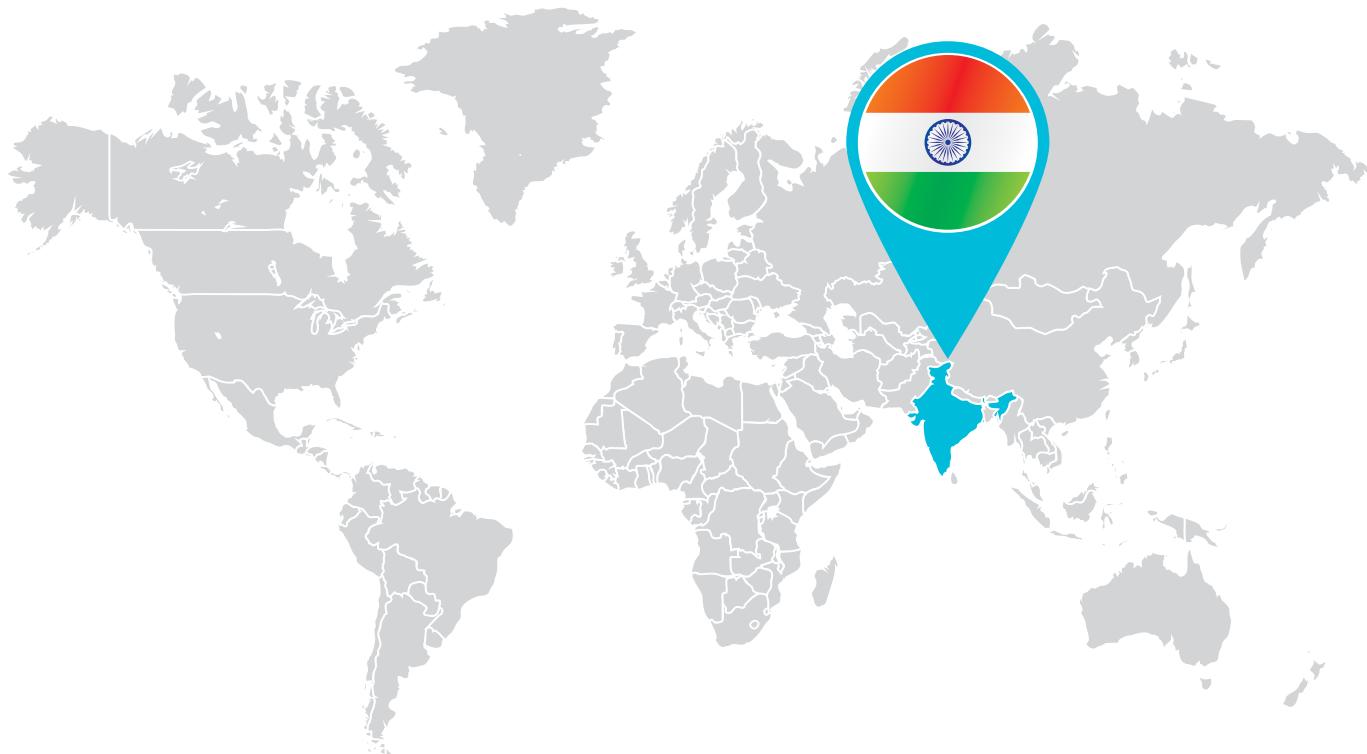
To strengthen online service delivery, the Brazilian government wanted to provide greater access and better services to citizens, and increase the transparency of government actions.

The Brazil National Portal has a thematic approach that provides relevant information to different constituents' needs. For example, the "For" section on the portal addresses the needs of students, workers and businesses, and the "About" section is differentiated by topics such as health, education, environment and citizenship. Users can access government services such as payment of income tax, fines, utilities and applying for social welfare benefits. The portal connects users to various ministries and government departments.

An innovative feature of the portal is MeuBrasil (My Brazil), where users can customize content per their preferences. Another innovative approach is the linking to the Ministry of Health portal, where radio users can receive the latest news and information on health issues through a live webcast, while its microsite offers health crisis information.²⁰

²⁰Source: <http://www.brasil.gov.br/>, Page 22 of United Nations E-Government Survey 2012

India



Ranking 8 | Digital Maturity Level
Latitude/Longitude 20°N/77°E | Capital
New Delhi |
Population 1.2 billion | Land area
2,973,193 square kilometer | GDP per
capita US\$3,813



Digital strategy and approach: Moving toward citizen centricity and transparency

In India, e-governance has steadily evolved from computerization of government departments and records to initiatives focusing on citizen centricity, service orientation and transparency. In 2006, the Department of Electronics and Information Technology, and the Department of Administrative Reforms and Public Grievances formulated the National e-Governance Plan (NeGP), providing a boost to the e-governance process in India. The NeGP aims to improve the delivery of government services to citizens and businesses with the following vision:

"Make all government services accessible to the common man in his locality through common service delivery outlets and ensure efficiency, transparency and reliability of such services at affordable costs to realize the basic needs of the common man."²¹

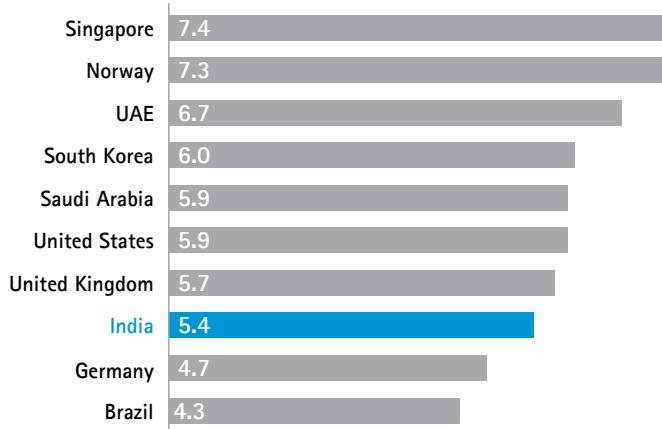
NeGP encompasses mission mode projects (MMPs), which focus on key domains of electronic governance such as banking, land records or commercial taxes. "Mission mode" implies that projects have clearly defined objectives, scopes, and implementation timelines and milestones as well as measurable outcomes and service levels. NeGP comprises 27 MMPs—10 state, 10 central and seven integrated projects. Each state government can also define five MMPs specific to its needs. In cases where the central government's assistance is required, such inclusions are considered on the advice of the concerned line ministries or departments.

²¹Source: <http://deity.gov.in/content/national-e-governance-plan>

Digital government performance

India ranked eighth overall in digital government performance (Figure 37).

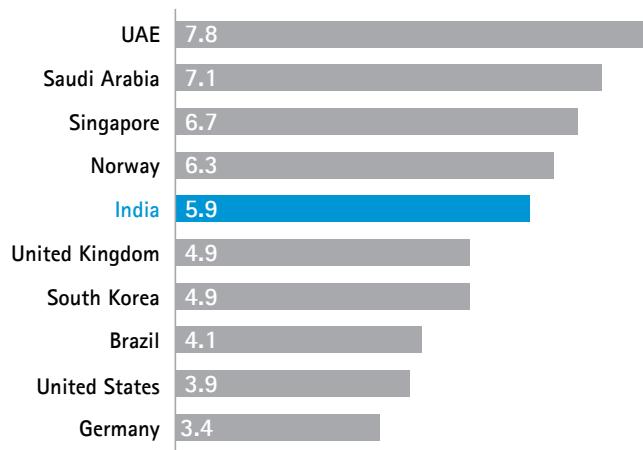
Figure 37: India overall ranking



In Citizen Service Experience, the Indian government performed well only in citizen-centered interaction with an average performance in proactive communication and education, and cross-government service interaction. The country performed low in a number of pillars such as use of social media, service maturity and multichannel service delivery.

However, the Citizen Satisfaction Survey results reflected a different picture altogether. The survey results placed India higher than some developed countries, such as the US and UK (Figure 38). This is primarily because its citizens are pleased with recent progress on digitalizing key services, improving access and promoting digital literacy.

Figure 38: India Citizen Satisfaction Survey



The citizens of India have listed the following top priorities to improve public services in the future:

- Plan for the long term, not just the next few years (35 percent). Citizens feel that the government should have a long-term vision and plan to provide more advanced digital services that would help increase their confidence in the government's actions.
- Understand better the priorities of citizens and communities (32 percent). Citizens want the government to address their needs better and provide advanced platforms such as social media and mobile to interact with government departments. In fact, more than 80 percent of the surveyed citizens are open to using cloud computing.
- Improve the skills of people who work in public services (29 percent). Citizens want the government to focus on training public sector employees to meet the challenges of public services in the future. Currently, just half of the surveyed citizens feel that the employees possess the required skills.

The Indian government aims to provide more citizen-centric services through digital channels, and ensure greater transparency by involving citizens and businesses in shaping how public services are designed and delivered. Additionally, India's national e-governance plan will be backed by investments in building a robust ICT infrastructure, and enhancing the accessibility and use of ICT technologies.

Current achievements

Aadhaar—Unique Identity Card (UID)

The unique identification project was conceived by the Indian Planning Commission as an initiative to provide a unique identity to each resident across the country and use it as a basis for efficient delivery of welfare services. Under the project, each citizen is issued a unique identification number that can be verified and authenticated online, in a cost-effective manner, which helps eliminate duplicate and fake identities. One of the focus areas while designing the enrolment process was the inclusion of the marginalized population.

As of March 2013,
more than 316 million
identity cards have
been issued to Indian
citizens.

The government set up the Unique Identification Authority of India that developed and implemented the necessary institutional, technical and legal infrastructure to issue unique identity numbers to Indian residents. In five

years starting 2010, the authority plans to issue 600 million unique identification numbers. The numbers are issued through various registrar agencies across the country. These registrar agencies include banks and other financial institutions that work with enrollment agencies (mostly technology companies).

There is a strong budgetary backing for the project from the central government, and effective media campaigns that highlight the benefits have helped improve adoption rates. As of March 2013, more than 316 million identity cards have been issued to citizens across the country.

Saudi Arabia



Ranking 5 | Digital Maturity Level

Latitude/Longitude 25°N, 45°E | Capital
Riyadh |

Population 28.8 million | Land area

2,149,690 square kilometer | GDP per capita US\$ 31,214



Digital strategy and approach: Enabling effective use of digital services through a secure and integrated approach

Yesser, Saudi Arabia's e-governance program, is rapidly expanding its IT services and infrastructure in support of its national e-government agenda.

The government of Saudi Arabia aims to enable citizens to use government services in a secure, integrated and easy manner through multiple digital channels. The government realizes that it is extremely necessary to cooperate in various areas to transform into an information society and achieve established objectives.

Saudi Arabia's Ministry of Communications and Information Technology—in partnership with the Ministry of Finance and Communication and Information Technology Commission—has also established Yesser, the country's e-governance program with the following objectives:

- Increase the public sector's productivity and efficiency
- Provide better and easy-to-use services for citizens and businesses
- Increase return on investment
- Provide the required information in a timely and highly accurate manner

An office of strategy management (OSM) has been established within Yesser to track and report progress against the action plan. The OSM will emphasize the importance of working across agencies and sharing experiences.

In addition to the Yesser program, Saudi Arabia also has in place the national e-government action plan (2012–16) that aims to:

- Build a sustainable e-government workforce.
- Improve the public's experience of interacting with the government.
- Develop a culture of collaboration and innovation.
- Improve government efficiency.

Several ministries are taking transformative initiatives to increase the use of digital innovations to address major public policy challenges and enhance citizen service experience. For example, the Ministry of Labor and the Human Resources Development Fund are launching a major Virtual Labor Market ecosystem to serve all stakeholders in the labor market. It aims to create a robust job database that job seekers can easily access. The program will provide citizens the necessary job search support, and an online training and counseling services as well as support private employers in finding qualified resources to increase employment opportunities for Saudi citizens, including women and persons with disabilities.²²

Saudi Arabia is also pursuing a new approach to citizen engagement and collaboration in decisions related to the citizen service delivery experience. One example is a crowdsourcing program led by the Ministry of Commerce and Industry. The program aims to engage the public to assist in reporting consumer protection and commercial violation. The ministry has developed a mobile app that allows citizens to report commercial violations and the reports generated allow the ministry to investigate the issues. It has also created an ideation portal that encourages the public to submit ideas to improve the commercial environment for consumers and companies. The public can view, suggest improvements and vote for the ideas. This program has already generated a positive feedback from users.

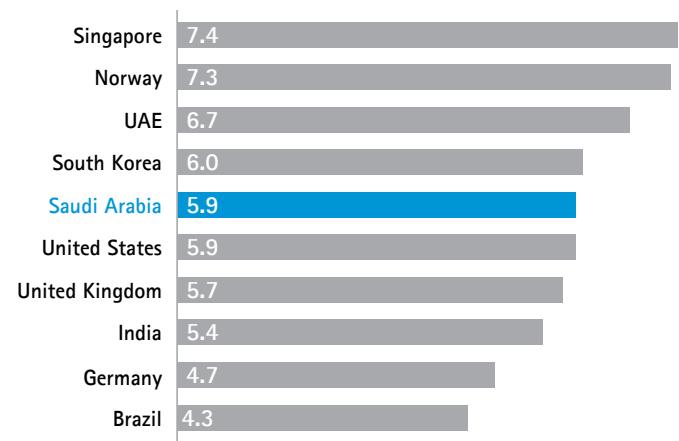
Another recent initiative is the Ma'an crowdsourcing platform²³ established by the Ministry of Labor. The platform will allow the public and relevant stakeholders to review draft policies, and provide confidential feedback and opinions. The ministry will seek the views and suggestions of the citizens and labor market stakeholders on draft decisions before any official adoption. This will open the door for better collaboration, ensure proper

decision making, and unify the vision and goals of both the Ministry of Labor and the citizens.

Digital government performance

Saudi Arabia ranked fifth overall in digital government performance (Figure 39).

Figure 39: [Saudi Arabia overall ranking](#)



Our research revealed that the government understands the importance of e-governance and strongly believes in the benefits it can bring to the economy.

In Citizen Service Experience, there is scope for improvement in some pillars—service maturity, citizen-centered and cross-government service interaction, multichannel service delivery, and proactive communication and education.

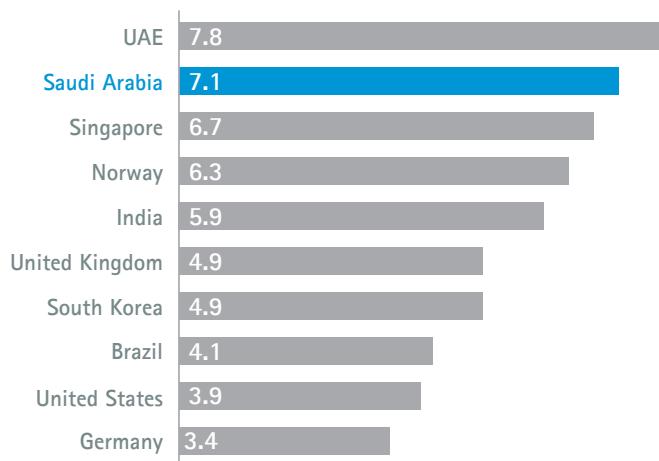
However, the results of the study showed that there isn't a strong correlation between the Citizen Service Experience and the satisfaction level of citizens as measured by the Citizen Satisfaction Survey, indicates that there is an optimism toward the future (Figure 40). The country ranked high in the survey, which confirmed that its citizens acknowledge the government's efforts to drive improvement in the services (as compared to a few years ago) and have confidence in its ability to provide enhanced public services in the future. This is also supported by the fact that the country ranked ninth in e-participation in the United Nations E-Government Survey 2012 and seventh for using ICT to improve the efficiency of government services in the WEF's The Global Information Technology Report 2013.²⁴

²²Source: <http://www.saudi.gov.sa/>, <http://www.slideshare.net/socialgcf/he-adel-fakeih-ksa-minister-of-labor>

²³Source: <http://www.ma3an.gov.sa/>

²⁴Source: http://www3.weforum.org/docs/WEF_GITR_Report_2013.pdf

Figure 40: Saudi Arabia Citizen Satisfaction Survey



The citizens of Saudi Arabia have listed the following top priorities to improve public services in the future:

- Understand better the priorities of citizens and communities (37 percent). Citizens want the government to advance the way it customizes public services for them. More than 80 percent of the surveyed citizens showed high interest in using social media, mobile and cloud computing to interact with government departments.
- Plan for the long term, not just the next few years (37 percent). Citizens feel it is important for the government to provide more services through digital channels in the future. So, the government can continue its focus on long-term planning, and appropriate communication and rollout of services through multiple digital channels.
- Provide services in a more cost-effective manner (33 percent). Citizens want the government to provide services through many digital channels in a cost-effective manner. In Saudi Arabia, 59 percent of the surveyed citizens reported using digital channels to do business with public services. As this number increases, its citizens will expect the government to provide the services at a lower cost.

Saudi Arabia has a strong focus on e-governance. The country can look at delivering enhanced citizen-centric services, while driving more cost efficiencies.

Current achievements

SAUDI—National E-government Portal

The national e-government portal allows citizens, residents, businesses and visitors to access services offered by the Saudi Arabia government and its agencies. The portal has a visually appealing interface, with a single sign-on that provides a reliable and convenient identification method. The users can browse the service catalog and choose from 1,400 e-services of different levels—from information-based services to very complex transaction-based ones. The portal outperforms traditional national e-services portals by offering the users open data, e-inclusion and e-participation features through multiple channels, including mobile and a 24/7 call center. It also serves as a public relations tool for the government to publish news and events from all over the country.

SAUDI portal is a winner in the e-government and open data category at the World Summit Award Global Congress 2013.

The portal is accessible 24/7, providing a centralized directory of government agencies and links to Saudi Arabia's regulations, laws, plans and initiatives. At its peak usage, the portal can receive more than 13.6 million visitors a month. SAUDI portal is a winner in the e-government and open data category at the World Summit Award Global Congress 2013.²⁵

SADAD Payment System

Saudi Arabia had a manual, paper-based payment system that created significant inefficiencies and overheads for consumers and banks. The government was losing about 10–15 percent in revenues annually due to human errors, frauds and delays associated with the manual system. The government needed a payment system that would improve service delivery for citizens, and enhance financial operations for government bodies and the private sector.

²⁵Source: <http://www.wsis-award.org/winner/saudi-national-portal-saudi-107320130903>, http://www.saudi.gov.sa/wps/portal/lut/p/b1/04_Sj9CPyksy0xPLMnMz0vMAFgjz0Id3Z2dgj1NjAz8zUMMDTxNzZ2NNU0NDd29DfWDU_P0_Tzc1P1C7IdFQFV9Yh0/dl4/d5/L2dJQSEvUUt3QS80SmtFL1o2X0FHQ0JTSTQyME83VDEwSTU3QzNBNTExMEE0/

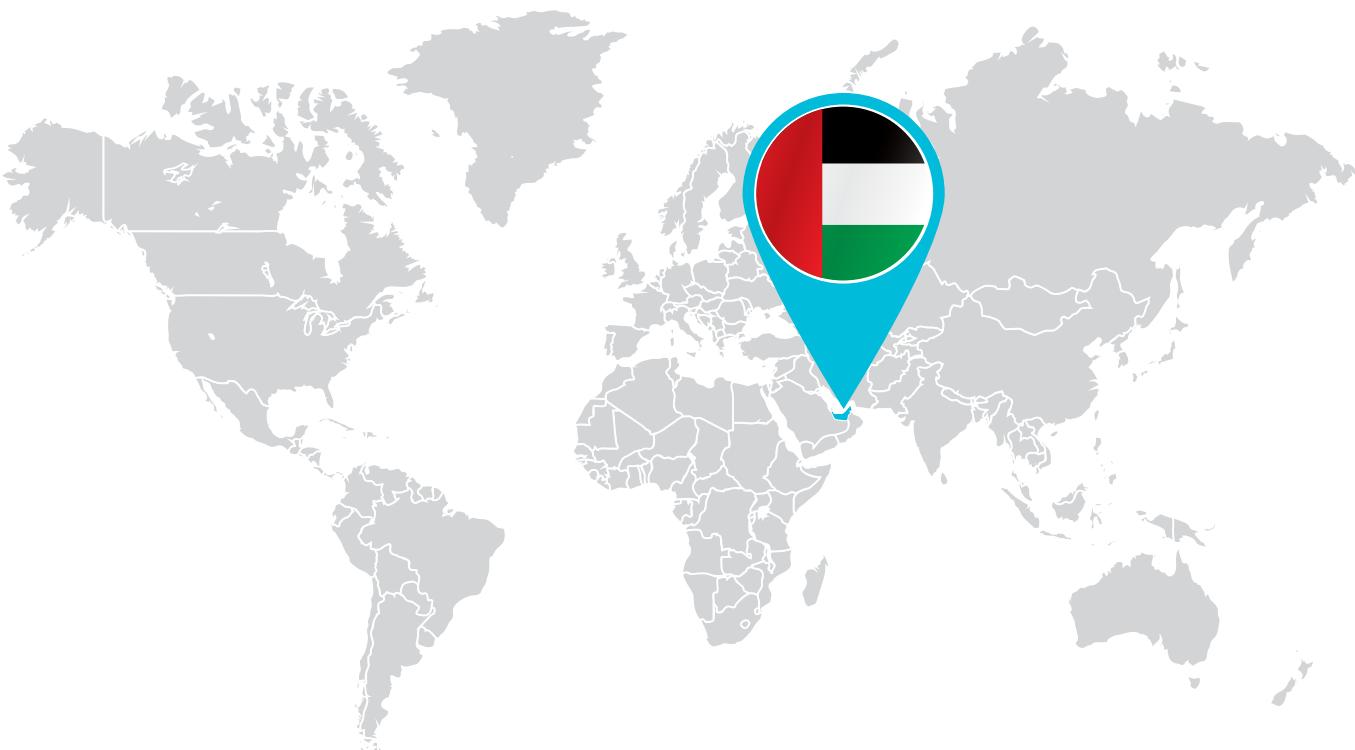
SADAD has reduced the overall costs associated with bill payment by millions of dollars annually.

In October 2004, the Saudi Arabian Monetary Agency introduced the SADAD Payment System—a national electronic bill presentment and payment (EBPP) service. Using

this 24/7 service, citizens can easily pay all utility bills electronically through all banking channels in Saudi Arabia. This has greatly benefited the citizens as they are no longer required to spend long hours in queues. The usage of bank branches for bill payments reduced from 73 percent in 2003 to 6 percent in 2010. Billers now receive refunds in one business day, instead of the earlier period of seven to 60 days.²⁶

SADAD has also helped minimize frauds, and provided an audit trail system and data reporting for each transaction. In fact, the centralized EBPP system reduced the overall costs associated with bill payment by millions annually. It won the United Nations Public Service Award in 2009.

²⁶Source: *Government-led Innovation in Service Delivery: The Case of SADAD in Saudi Arabia*, Harvard Kennedy School Case Program



Ranking 3 | Digital Maturity Level
Latitude/Longitude 24°N/54°E | Capital
Abu Dhabi |
Population 9.4 million | Land area
83,600 square kilometer | GDP per
capita US\$ 41,397



Digital strategy and approach: Advancing e-transformation across government services

The UAE government aims to advance e-transformation across government services in the country. Its e-government program started way back in 2001 (Figure 41). One of the earliest e-services offered was an electronic card, known as eDirham in 2001, issued to collect government services fees.

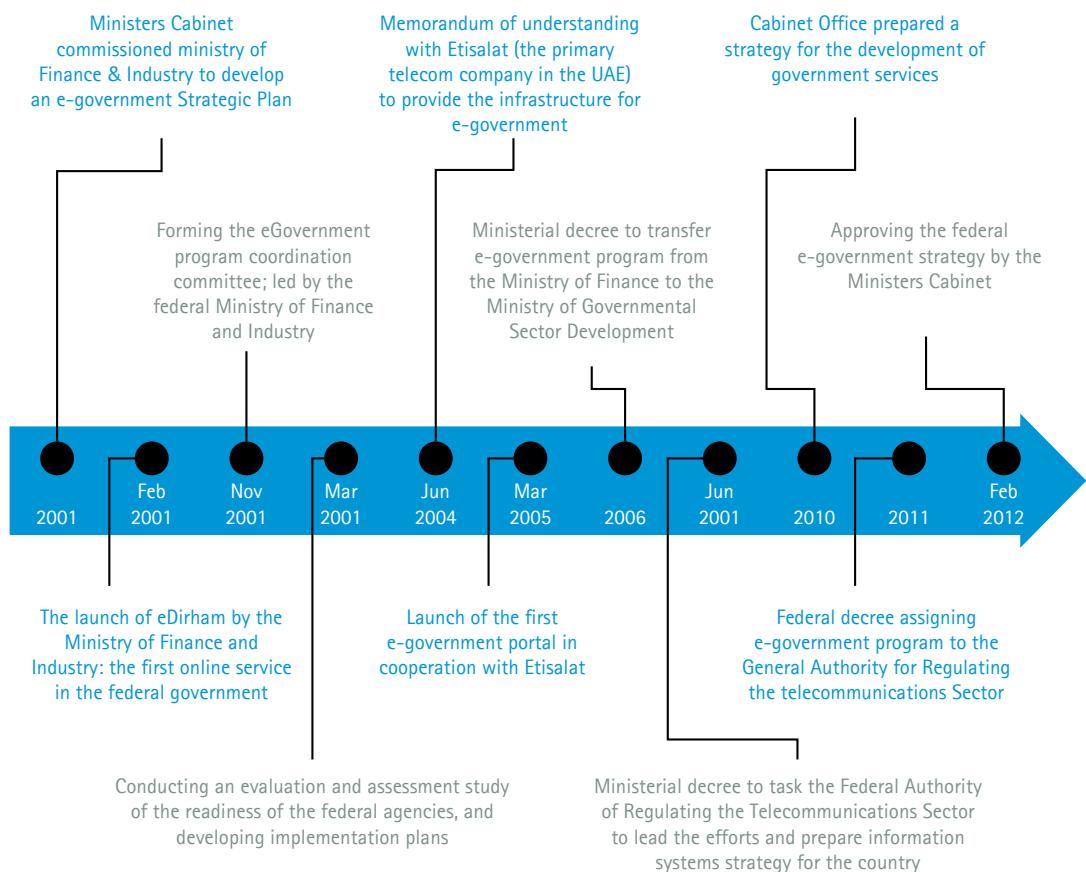
The UAE has now developed a federal e-government strategic framework for 2012–14, which charts the initiatives and courses of action that the government plans to take over three years.²⁷

The framework seeks to contribute to:

- UAE Vision 2021, which aims to make the UAE one of the best countries in the world.
- UAE Government Strategy 2011–13, which aims at putting citizens first, and developing an accountable and innovative government. It strives to ensure that all government work is conducted according to a set of guiding principles that puts citizens first and promotes an accountable, lean, innovative and forward-looking government.
- UAE Federal E-government Plan 2014, which aims to catalyze full-scale adoption of e-services. It will help enhance legislative environment for e-services, attain advanced ICT infrastructure, develop the institutional framework for e-government and cloud computing strategy for the federal government.
- ICT Development, which focuses on the Internet, mobile, telephones and e-kiosks

²⁷Source: <http://www.emiratesid.gov.ae/userfiles/eGovernment%20Strategies%20The%20Case%20of%20UAE.pdf>

Figure 41: UAE—Evolution of the e-government journey



The UAE government has also developed an operating model to measure progress based on citizen centricity, and efficiency and effectiveness. It is strongly focused on building trust and security in its e-government plan through the national identity management infrastructure program, where citizens will be issued smart cards for their digital identities.

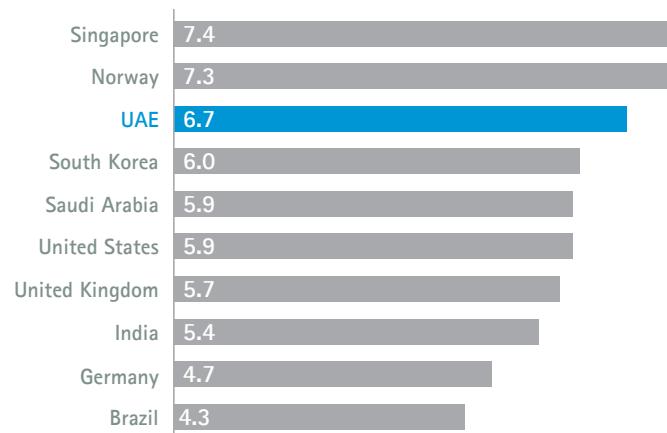
In the area of cross-government integration of services, the UAE Ministry of Interior recently inaugurated a federal vehicle portal—Markabati. It is a comprehensive portal that provides several integrated interactive systems dedicated to vehicle procedures. It connects

the citizens to appropriate public and private entities, and serves as an assembly point for traffic services, government agencies, customs and insurance services, vehicle workshop classifications, spare parts information, report management system, e-payment portal and car leasing companies. Markabati enables citizens to buy and sell vehicles, acquire licenses and car insurance, and carry out inspections and lease renewals. It also allows other entities to issue documents required for vehicle-related paperwork by connecting the portal to relevant governmental entities.

Digital government performance

The UAE ranked third overall in digital government performance (Figure 42).

Figure 42: UAE overall ranking

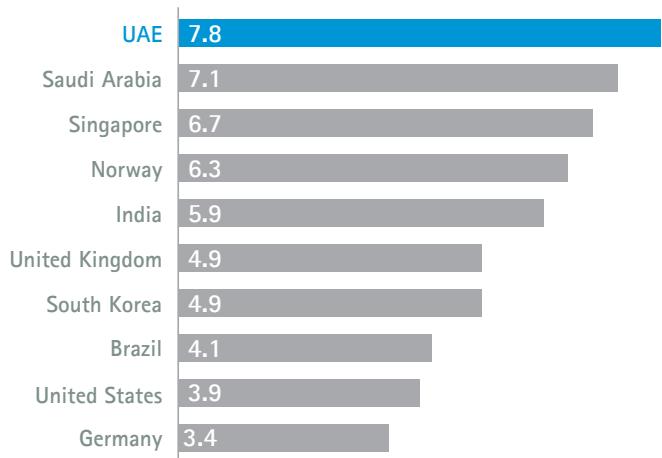


The UAE is an emerging leader in e-government development globally and its level of digitalization is comparable with that of global leaders. The country ranked seventh in online service delivery and sixth in e-participation in the United Nations E-Government Survey 2012.

In Citizen Service Experience, the UAE performed well in the use of social media to connect with citizens and businesses, and proactive communication and education. It showed a mid-level performance in citizen-centered and cross-government service interaction, and multichannel service delivery.

The UAE ranked first in the Citizen Satisfaction Survey (Figure 43) and can be considered a rising star in the category of Builders countries, owing to citizens' perceptions and confidence in government to meet future needs. Its citizens are conscious of the crucial role that digital channels play in enhancing social outcomes and service quality. Citizens are also confident of the skills and abilities of public sector employees to meet the challenges of public services in the future.

Figure 43: UAE Citizen Satisfaction Survey



The citizens of UAE have listed the following top priorities to improve public services in the future:

- Provide services in a more cost-effective manner (37 percent). Citizens still demand more cost-efficient services, despite the government making significant efforts to reduce wastefulness in government spending and leverage ICT for government efficiency.
- Plan for the long term, not just the next few years (35 percent). Citizens feel that long-term planning, and appropriate communication and rollout of digital services would help increase their confidence in the government's actions.
- Understand better the priorities of citizens and communities (34 percent). Citizens want the government to continue its focus on addressing their needs, especially when there is high interest in using mobile and cloud computing (more than 80 percent of the surveyed citizens) to interact with government departments.

The UAE government places high priority on digital and has aligned its digital strategy with its broader development plan. The government is aiming to make more public services available digitally in a cost-effective manner, and ensuring digital literacy and inclusion.

Current achievements

The UAE Federal Feedback Gateway—My Gov

The UAE Federal Feedback Gateway "My Gov" was launched as part of the government's efforts toward improving citizen satisfaction by opening communication channels to identify and fulfill their needs better, and attaining excellence in government service delivery.

The gateway is a single, all-encompassing channel for citizens to communicate with all government entities. Citizens can submit their ideas to help improve the service experience, and express dissatisfaction about any administrative procedures and regulatory or disciplinary matters.

The gateway constitutes an integrated management framework to deal with citizens' feedback efficiently and effectively. The feedback is then used to develop federal government services and increase the level of citizen satisfaction by improving the services in line with Vision 2021, which aims to make the UAE one of the best countries in the world. The program enables high levels of transparency and accountability in policy making and government, and facilitates participation by encouraging citizen engagement in political issues.²⁸

Emirates Government Service Excellence Programme

The Emirates Government Service Excellence Programme aims to provide a consistent citizen experience across service centers.

The program aims to enhance government services in line with Vision 2021 by standardizing service quality, ensuring consistency in citizen experience across all service centers and promoting cost efficiency.

Under the program, centers that provide government services are classified and awarded two to seven stars in eight key pillars²⁹—strategic alignment, service delivery channels, citizen centricity, services, citizen experience, service efficiency and innovation, people and technology. The program aims to make all federal services reach seven stars. It also focuses on training and up skilling the staff to attain excellence in government services.

²⁸Source: http://www.moca.gov.ae/?page_id=595&lang=en

²⁹Source: http://www.moca.gov.ae/?page_id=958&lang=en

Enhancers: Germany, Norway, Singapore and South Korea

Germany



Ranking 9 | Digital Maturity Level |
Latitude/Longitude 51°N/9°E | Capital
Berlin |

Population 82.1 million | Land area
349,223 square kilometer | GDP per
capita US\$41,425



Digital strategy and approach: Leveraging ICT to promote sustainable economic development

Germany's ICT strategy, Digital Germany 2015, sets out the country's priorities, tasks and projects until 2015. It defines the ICT policy framework for ministries to plan and implement the required measures to:

- Strengthen economic competitiveness through the use of ICT in all segments.
- Expand digital infrastructure and networks to meet the future challenges.

- Safeguard the personal rights of users on all digital channels.
- Step up research and development in the ICT sector, and translate the research findings into marketable products and services.
- Strengthen education and training in handling new digital channels.
- Make consistent use of ICT to address sustainability and climate protection, health and improving the quality of life of its citizens.

With the implementation of the ICT strategy, the government seeks to contribute to sustainable economic growth, help create new jobs and ensure better outcomes for the society. The German government believes that a modern and efficient federal government IT will lay the foundation for the effective organization of the country's digital future.³⁰

³⁰Source: <http://www.bmwi.de/English/Redaktion/Pdf/ict-strategy-digital-germany-2015.property%3Dpdf>

The country's e-government measurement framework aims to ensure accountability: Recognizing the impact that information technology has on public sector productivity, Germany has implemented an assessment and evaluation system—WiBe—that maps both monetizable and nonmonetizable efficiency gains from digital government investments for public administrations and users. The framework measures value from e-government initiatives across different elements:

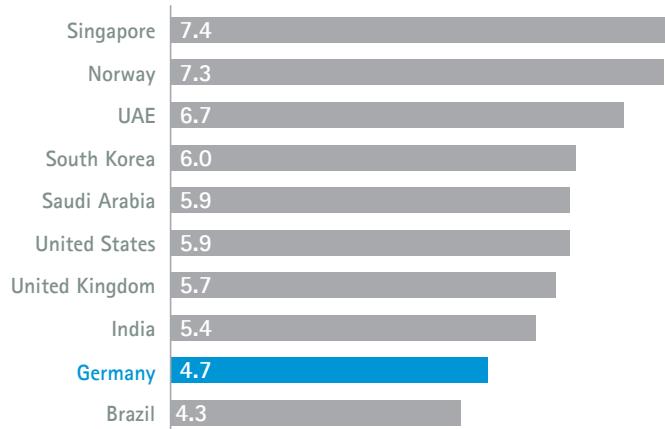
- Cost and benefits
- Strategic importance of the IT project
- Impact and effects from digital government investments

This initiative provides greater visibility into the digital return on investment, and will help the government identify and prioritize key improvement areas.

Digital government performance

Germany ranked ninth overall in digital government performance (Figure 44).

Figure 44: Germany overall ranking

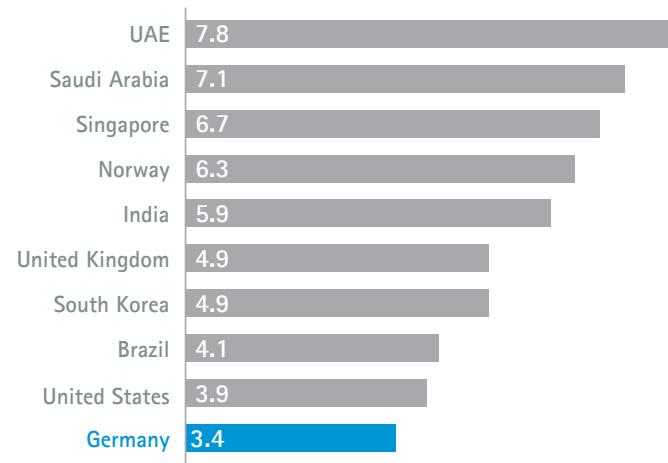


In Citizen Service Experience, Germany performed low in almost all pillars, including citizen-centered and cross-government service interaction, multichannel service delivery, and proactive communication and education.

It is not surprising that the low performance in Customer Service Experience reflected similar results in the Citizen Satisfaction Survey, where it ranked the last among the 10 countries (Figure 45). Like Brazil and the US, German citizens are also not satisfied with the services offered by their government and have the least confidence in their government's ability to provide public services customized to their needs.

It is important to note that though 64 percent of the surveyed citizens feel that it is important for the government to provide more services through digital channels, only 25 percent of them actually use such channels for business with the government. This could be due to the fact that its citizens are concerned about security and privacy. The government is addressing this concern in its digital strategy and working toward increasing digital adoption.

Figure 45: Germany Citizen Satisfaction Survey



The German citizens have listed the following top priorities to improve public services in the future:

- Make sure that services are more customized to citizens' needs (43 percent). Citizens demand services that are customized to their individual needs. The government may have to look at leveraging big data and analytics to be able to provide services that meet specific needs.
- Understand better the priorities of citizens and communities (42 percent). Citizens want the government to be more citizen centric. They want the government to continue its focus on widening e-engagement efforts through policy framework and institutional mechanisms for greater citizen consultation and feedback. In fact, 64 percent of the surveyed citizens would like to be more involved with the government in shaping public services.
- Be flexible in responding to changes around them (25 percent). Citizens want the government to be agile and responsive enough to adjust and respond to any economic or market changes.

Germany's government, as part of its digital strategy, is working toward driving greater innovation reforms to improve citizen engagement and satisfaction.

Current achievements

Bundesagentur für Arbeit—Virtual Labor Market

Virtual Labor Market provides sophisticated job matching capabilities, and increases transparency and access to the job market.

The German Federal Ministry of Labor and Social Affairs has developed the Virtual Labor Market (VLM) platform to enable successful reintegration of jobseekers into the labor market. The platform is built on three elements: an online job portal, an internal

system to support employment services and vocational counseling, and an online job crawler that collects job vacancies from company websites. Jobseekers can use the VLM to better manage their applications and customize them according to employers' demands. Companies, in turn, receive assistance and many tools to manage their job postings.

Overall, the VLM has increased transparency and access to the job market. The management of agencies has also become more efficient because of a common centralized database. The portal is aligned with the current e-government agenda, as it enhances communication through integrated e-governance processes.³¹

³¹Source: <http://www.accenture.com/us-en/Pages/insight-toward-thriving-labor-markets.aspx>, <http://www.accenture.com/in-en/Pages/insight-delivering-public-service-future-navigating-shifts.aspx>

German Parliament E-services: Bundestag.de

Bundestag.de provides democratic value to German citizens through transparency and political engagement.

The Bundestag.de website allows citizens to easily follow parliamentary proceedings and engage in governmental issues. The website provides in-depth analysis of current affairs and advanced search functionality. It also has

interactive features such as online petition procedures, discussion groups and online reservations for visits to the Bundestag—the forum where policies are formulated and discussed.

The website has an expansive database of content—more than 60,000 HTML pages, 80,000 PDFs and 6,000 hours of videos. A team of nearly 100 editors maintain an up-to-date portfolio of information on members, committees and lobby groups, same-day minutes and proceedings, as well as the structure and organization of the Bundestag. Citizens can take a virtual tour of the famous Bundestag building in the history section. Citizens can also access the content on their smartphones and tablets by using the Bundestag app. The content is available in English, French and Arabic.³²

³²Source: <http://www.bundestag.de>

Norway



Ranking 2 | Digital Maturity Level |
Latitude/Longitude 62°N/10°E | Capital
Oslo |
Population 5 million | Land area
304,282 square kilometer | GDP per
capita US\$65,640



Digital strategy and approach: Digitalization to improve services and operational efficiency

The digital public sector of the future will continue to focus on providing services to citizens and developing the required back-office infrastructure.

and create more value for businesses—thus, ensuring sustainable and inclusive development of the society.

The Agency for Public Management and eGovernment (Difi), entrusted with renewing the country's public sector, set out a broad strategy for 2009–12 that was aimed at providing direction and priorities to develop the public sector through e-initiatives across government departments. These initiatives include developing secure e-identification solutions, launching a new citizen portal, promoting a pan-European e-commerce solution and supporting environment-friendly public procurement.

To create the digital public sector of the future, Norway will continue to focus on providing better services to citizens and developing the required back-office infrastructure.

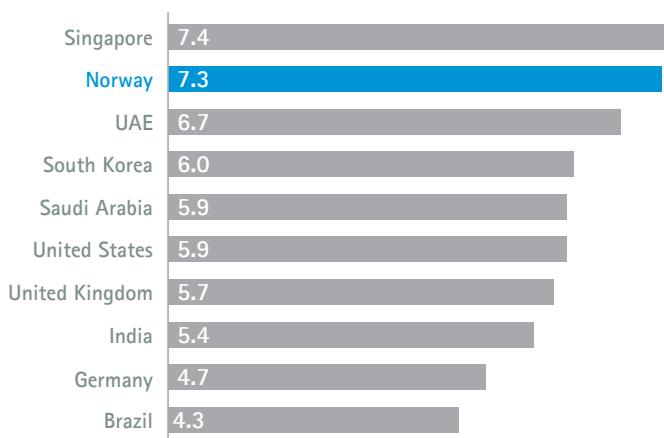
The country's digital strategy is based on five key principles:

- Digital communication will be the main mode of communication with the public sector.
- The public sector will provide unified and user-friendly digital services.
- Login to online public services should be simple and secure.
- Necessary assistance will be provided to citizens to ensure they are able to find and use digital services.
- The development of ICT solutions will be viewed in the context of the public sector's work processes and organization.
- Strong emphasis on information security and safeguarding personal information.

Digital government performance

Norway ranked second overall in digital government performance (Figure 46).

Figure 46: Norway overall ranking



In Citizen Service Experience, Norway leads in multichannel service delivery and the use of social media. It also performed well in proactive communication and education, and citizen-centered and cross-government service interaction. However, there is work to be done to improve service maturity.

The Citizen Satisfaction Survey showed that the country has one of the best mixes of citizen satisfaction and expectations (Figure 47). It has well-functioning and

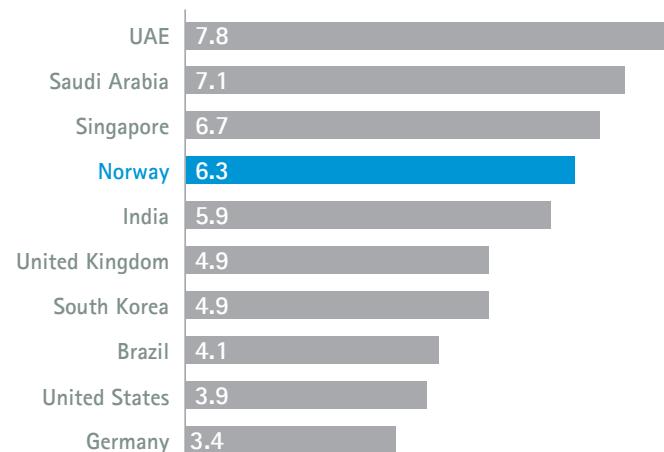
transparent public institutions, reflected by its twenty-third rank in the WEF's Global Competitiveness Index 2012–13 for transparency of government policymaking.

Norway's citizens have listed the following top priorities to improve public services in the future:

- **Make sure that services are more customized to citizens' needs (47 percent).** Citizens show a high level of interest in using digital channels such as cloud computing and mobile to interact with the government.
- **Plan for the long term, not just the next few years (38 percent).** Citizens feel that long-term planning, and appropriate communication and rollout of digital services would help further increase their confidence in the government's actions. The country's digital strategy aims to drive seamless collaboration and interaction between the government bodies and its citizens through various e-initiatives.
- **Improve the skills of people who work in public services (35 percent).** Citizens want public sector employees to be better equipped and trained to meet the challenges of public services in the future. Currently, only 33 percent of the surveyed citizens feel that the employees possess the right skills.

Norway is looking to foster technological innovation, and leverage ICT to drive government efficiency and improve the way it provides online information, participatory tools and services to its citizens.

Figure 47: Norway Citizen Satisfaction Survey



Current achievements

Norway's Electronic Public Records: Offentlig Elektronisk Postjournal

Offentlig Elektronisk Postjournal (OEP) is a centralized portal for citizens to search case documents relevant to their field of interest and submit requests to view the relevant case details. Norway's Freedom of Information Act applies to all levels of the government—municipal, state and country. The act corresponds with the Archives Act and the Noark Standard to ensure high-quality, open information. All administrative agencies in the country are required to maintain and publish a daily register to the OEP.

By 2012, the OEP had received more than five million registry entries, published by 105 government agencies.

The OEP processes around 20,000 information requests monthly. The portal receives a majority of the requests (50 percent) from journalists, and the rest from citizens, businesses, public employees and researchers. It has a controlled

framework—unless there is a legal restriction, all the documents are accessible at the point of being produced, received or transmitted by any central government agency; however, documents that could pose a security risk (about 20 percent) are not available. The online platform fosters accountability, transparency and democracy through the availability of information. By the end of 2012, the OEP had received more than five million registry entries, published by 105 government agencies.³³

Altinn Digital Platform

Altinn is a nationwide system that citizens and businesses can use to interact with the government. It can be accessed on a number of digital platforms, including mobile devices and enterprise resource planning systems. So far, more than 40 government agencies, administrative bodies and regional authorities offer 130 self-service electronic services, and the numbers keep growing. Approximately 75 percent of the required forms must be submitted to these agencies and thus, streamlining this massive amount of paperwork has been incredibly fruitful. Nearly 400,000 companies no longer use any paper forms to submit their declarations, and close to 90 percent of Norwegian companies have used Altinn at least once. Since Altinn's inception, more than 50 million forms and messages have been exchanged through it.

Since Altinn's inception, more than 50 million forms and messages have been exchanged through it.

Between 2008 and 2026, the Norwegian government expects Altinn to generate a net present value of billions due to the savings that come from improved data quality, time saved by companies, tax savings for citizens and reduced administrative costs. Moreover, Altinn is a core component of the country's digital strategy, which actively encourages all government bodies to use it. Collaborating around a platform such as Altinn on a national cloud is a far more effective and less expensive approach than building, operating and maintaining many individual solutions.³⁴

³³Source: <http://www.oep.no>

³⁴<http://www.accenture.com/us-en/Pages/insight-government-online-new-life-old-concept-summary.aspx>

Singapore



Ranking 1 | Digital Maturity Level |
Latitude/Longitude 1°N/103°E | Capital
Singapore |
Population 5.4 million | Land area
687 square kilometer | GDP per capita
US\$60,800



Digital strategy and approach: Moving toward collaborative government

Singapore's 2015 e-government plan is built on the vision to be a collaborative government that cocreates and connects better with its citizens. It seeks to achieve the vision of collaborative government through three strategic thrusts:

- Cocreating for greater value
- Connecting for active participation
- Catalyzing whole-of-government transformation

Programs for citizens

- Data.gov.sg: Provides easy access to publicly available government datasets.
- mGov@SG: Allows individuals and businesses to easily search, identify and access mobile services provided by the government.
- OneInbox: Allows individuals and businesses to receive electronic correspondences from the government in place of hardcopies.
- Website transformation strategy: Brings sustainable improvements in the quality of government websites.

Programs for the government

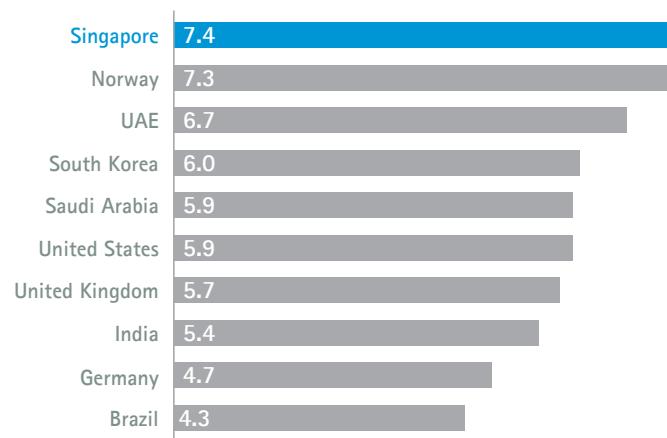
- Cloud computing for government: The Government Cloud (G-Cloud) provides a resilient and secure ICT-shared environment to government agencies for procuring computing resources on demand, with greater ease and at speed.

- Cube: This is a collaborative social networking platform for public officers to exchange ideas, share knowledge and work together in a virtual government space.
- Whole-of-government enterprise architecture: The program is aimed at establishing a federated view of all government agencies' enterprise architectures to optimize government ICT assets for greater cost savings.
- Workplace of the future: The program aims to transform government ICT infrastructure and workplace services to create an intelligent, dynamic and collaborative environment for next-generation public services.³⁵

Digital government performance

Singapore ranked first overall in digital government performance (Figure 48).

Figure 48: Singapore overall ranking

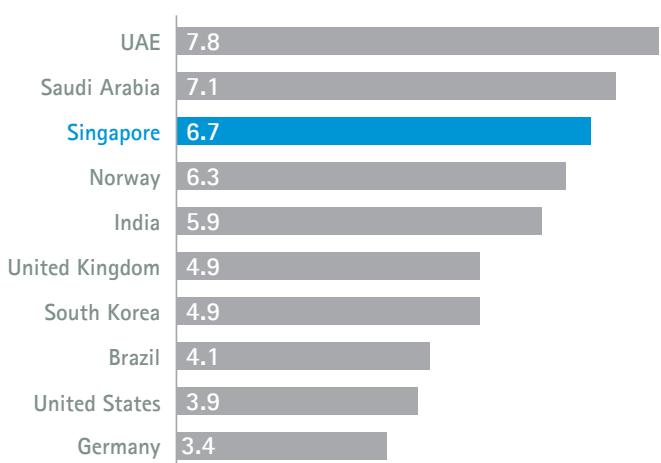


Singapore is a leader in digital government services, with more digitally mature services. In Citizen Service Experience, we found that it is among the leaders for multichannel service delivery, citizen-centered and cross-government service interaction, and proactive communication and education.

Singapore's digital readiness is backed by a sound fiscal management and an efficient government institutional framework. In fact, the country has the highest mobile broadband subscriptions per capita—more than 100 percent—globally and one of the world's highest mobile broadband penetration rates.

As a result, it is not surprising that it ranked among the top three in the Citizen Satisfaction Survey (Figure 49).

Figure 49: Singapore Citizen Satisfaction Survey



³⁵Source: As stated in the Singapore e-government master plan <http://www.egov.gov.sg/egov-masterplans/egov-2015/vision-strategic-thrusts>; eGov2015 publication page 9, 10, 11, 17; and <http://www.egov.gov.sg/egov-programmes/government/programmes>

Singapore's citizens expressed the following top priorities for improvement in future public services:

- Understand better the priorities of citizens and communities (44 percent). Citizens want a system that encourages more public participation and collaboration. In fact, the government is already looking at stimulating greater innovation by facilitating cocreation among citizens and businesses.
- Make sure that services are more customized to citizens' needs (33 percent). Citizens want the government to offer greater personalization through different digital platforms.
- Provide services in a more cost-effective manner (28 percent). Citizens want the government to focus on improving cost efficiencies. For example, the government can look at improving affordability of ICTs, which according to the United Nations E-Government Survey 2012 is Singapore's only relative weakness in e-governance.

For Singapore, the challenge now lies in staying ahead of the curve, including the use of leading technologies such as big data and analytics. It is well positioned to benefit from digitalization's impact on innovation, as well as to further improve the quality of e-government services. The country can take the journey toward digital society over the long term.

Current Achievements

SingPass

SingPass transactions have increased more than 10 times since its launch in 2003, increasing from 4.5 million to 46.3 million in 2011.

Launched in March 2003, SingPass is a single sign-on system that provides citizens convenient access to a holistic range of government services. It enables citizens to use a common password to interact with all government agencies online for services such as

company registration, income tax return filing, and new passport application submission and renewals. Currently, 57 government agencies authenticate users with SingPass for access to about 270 e-services that require secure user identification.

The program ensures cross-government collaboration and the single sign-on makes e-government services more accessible and reduces password fatigue for users. SingPass transactions have increased more than 10 times since its launch—from 4.5 million to 46.3 million in 2011. More than 2.8 million users have registered for this service till date.³⁶

³⁶Source: As stated in <https://www.singpass.gov.sg>; page 1 of http://www.egov.gov.sg/c/document_library/get_file?uuid=5d42c0ff-1bf9-4a65-bbe1-95b020870144&groupId=10157; and <http://www.asiaone.com/print/News/Latest%2BNews/Science%2Band%2BTech/Story/A1Story20130628-433129.html>

National Environment Agency's E-Government Initiative

Singapore has been recognized as one of the data collection or product centers in the region by the World Meteorological Organization.

E-Government Initiative shares environmental data related to air quality, public health and weather conditions with both governmental institutions and the general public.

The agency shares more than 100 environmental and spatial datasets with the government data hub, which is further used by other public sector agencies. The general public can access 75 datasets and eight map layers through the agency's portal—www.data.gov.sg. The agency also collaborates with the Public Utilities Board to assimilate environmental data and shares it with the public through mobile apps. CleanLah is one such app that empowers the public to report substandard cleaning services in their areas. Further, information related to water levels, dangers of flash floods and heavy rain is shared through text messages, enabling efficient environmental crisis management.

Collaboration between the government, public and private sectors has ensured the success of this initiative. Singapore has been recognized as one of the data collection or product centers in the region by the World Meteorological Organization.³⁷

My CPF Retirement Planning E-Services

Transactions through CPF Retirement Planning E-services increased to 46 million in 2010, while transactions at the counter decreased by 46 percent in the same year.

The Central Provident Fund (CPF) offers a range of e-services for retirement planning. It addresses each citizen's personal needs, irrespective of their IT literacy. Citizens can track the accumulating growth of their retirement funds, and use interactive calculators and scenario tools to simulate the future situation, receive appropriate advice to plan their retirement better and fix periods of underfunding through top-up payments. The services can be accessed 24/7 across multiple digital channels and additional help is available for citizens who are the less IT savvy in the form of assistance over the telephone. The CPF members are kept informed about any changes to their services through text messages.

Nearly 3.34 million citizens have access to CPF services and almost US\$1.15 million have been saved annually as at 2010, by reducing the use of paper statements. Transactions through e-services increased to 46 million in 2010, while transactions at the counter reduced by 46 percent in the same year.³⁸

³⁷Source: As stated in www.data.gov.sg, and page 7 of <http://workspace.unpan.org/sites/Internet/Documents/UNPAN90678.pdf>

³⁸Source: As stated in <http://cpf.gov.sg>, and <http://www.wsis-award.org/winner/my-cpf-%E2%80%93-cpf-service-transformation-76420110609>

South Korea



Ranking 4 | Digital Maturity Level |
Latitude/Longitude 37°N/127°E | Capital
Seoul |
Population 49.3 million | Land area
96,920 square kilometer | GDP per
capita US\$30,801



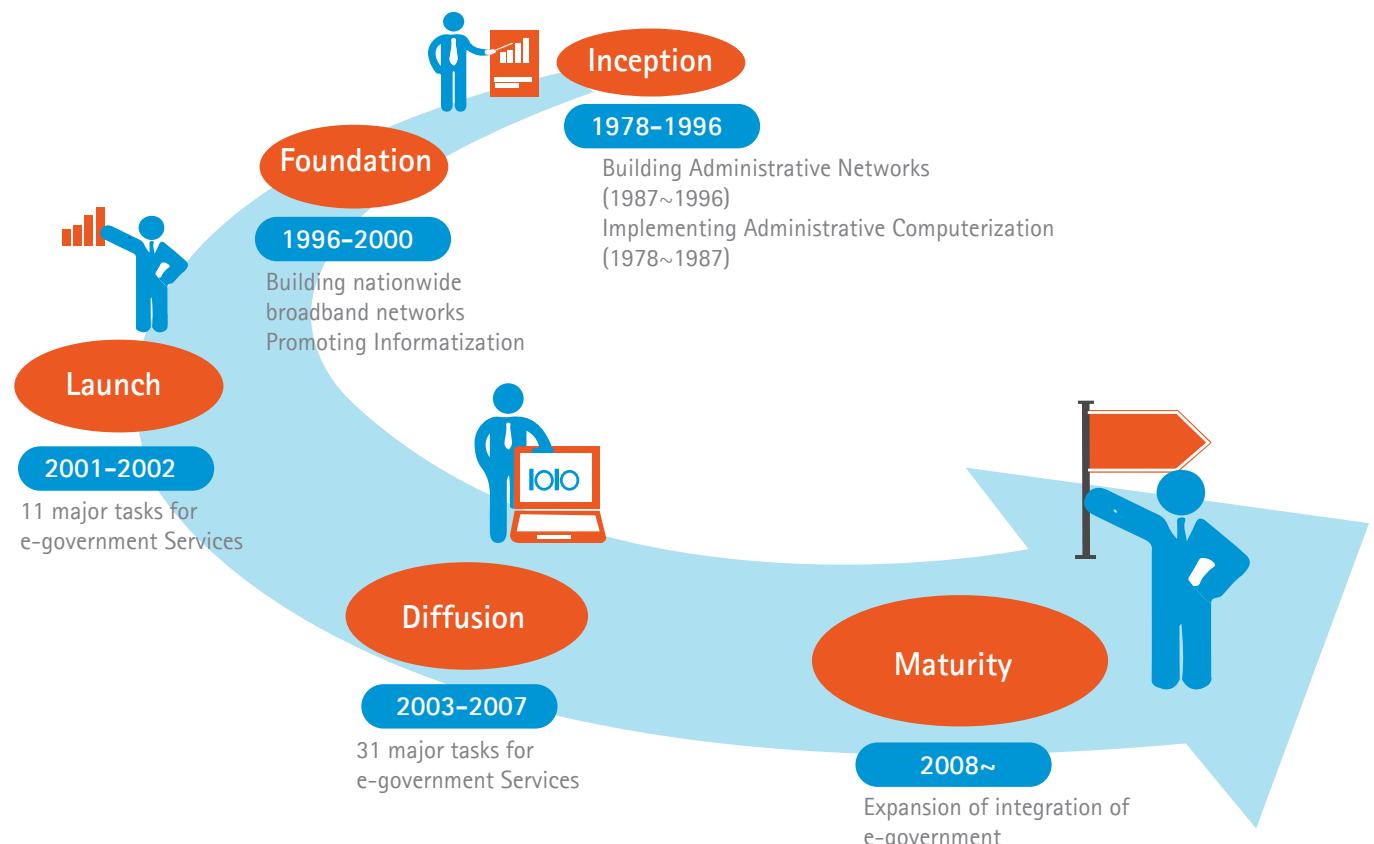
Digital strategy and approach: Building on a strong e-governance platform and successful history

E-government in Korea is cited as a major success story in numerous international economic indexes, and has served as one of the world's most cited best practice models. Korea's IT development status, which was between one-fifth and one-eighth the level of developed nations such as the US and the UK in 1987, has achieved accelerated growth—since 2007, Korea has been recognized as the world's leading IT nation.

The country's e-government has evolved due to the implementation of various government policies (political leadership as well as establishing visions, strategies and project priorities), transformations (implementing organizations, and flexible distribution of financial and technical resources), and taking into account citizen feedback and learning experiences. The expansion of mass public services and transparency in the administrative processes has also contributed to the advancement of Korea's e-government (Figure 50).³⁹

³⁹Source: © European Union <http://www.europarl.europa.eu/document/activities/cont/201305/20130514ATT66080/20130514ATT66080EN.pdf>

Figure 50: South Korea—E-government journey



Toward a smart government: Smart e-government 2015

The government's vision is to create an advanced government that promotes active citizen participation—anytime, anywhere—through the integration of smart devices and government services. The plan will focus on:

ICT: Active use of smart ICT

- Mobile devices
- Cloud computing
- Machine-to-machine service

Culture and Society: Active response to social change

- Evolving population
- Changing values
- Network society

Environment and Energy: Need for resolution of challenges

- Global warming and atmospheric change
- Energy crisis

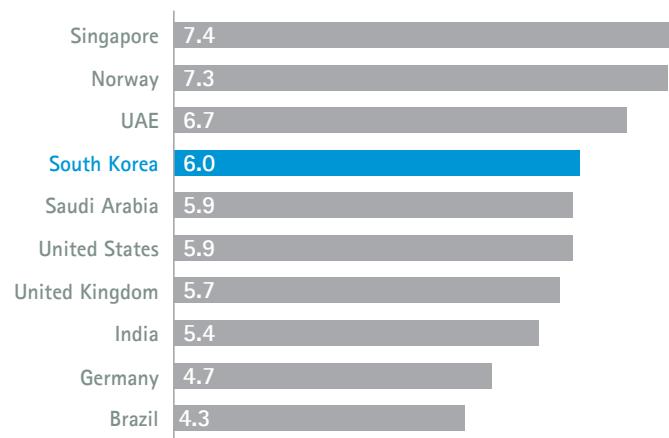
As part of its focus and effort to create a truly digital-led government of the future, Korea has set five agendas to upgrade the existing e-government. These include:

- Becoming the world's best mobile e-government
- Establishing a safe and sound society
- Promoting smart work that balances work and life
- Providing personalized services by communicating with citizens
- Building strong e-government infrastructure

Digital government performance

South Korea ranked fourth overall in digital government performance (Figure 51).

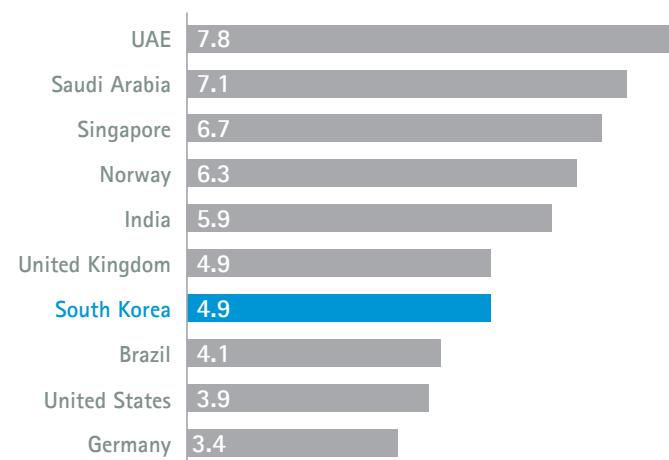
Figure 51: South Korea overall ranking



South Korea is internationally well known for the level of development and sophistication of the government services they offer electronically. In Citizen Service Experience, we found that the country leads in cross-government interaction as proved by the implementation of its Governmentwide Enterprise Architecture (case study listed in the current achievements section). The country showed a consistent performance in citizen-centered interaction and multichannel service delivery. However, it does fall slightly below in proactive communication and education, and use of social media.

In the Citizen Satisfaction Survey, South Koreans showed one of the lowest levels of satisfaction and confidence in the government services, affecting the country's final position in the ranking, similar to the US (Figure 52).

Figure 52: South Korea Citizen Satisfaction Survey



It is important to note that nearly 80 percent of the surveyed citizens are conscious about the importance of digital government services provision in the future. However, these results were in contrast to the relatively

less number of citizens who are currently using digital channels to interact with the government.

The government can invest additional time and resources to do some more work in the proactive communication area, jointly with better and more intensive use of social media, as more than 70 percent of the surveyed citizens are willing to use these channels for interacting with government. This is already reflected in the country's e-government plan for providing personalized services by communicating better with citizens.

South Koreans expressed the following priorities for improvement in future public services:

- **Publish information for the public (33 percent).** Citizens feel that the country needs to improve the quality of its public institutions. It ranked number 133 out of 144 countries in terms of transparency of government policymaking on the WEF's Global Competitiveness Index 2012–13—the lowest among the 10 countries.
- **Plan for the long term, not just for the next few years (28 percent).** Citizens strongly feel that the government should have a well-defined digital strategy to improve the overall citizen satisfaction. The government does have long-term plans to be more proactive in its communication, and leverage mobile and cloud computing technologies for better public services.
- **Provide services in a more cost-effective manner (26 percent).** Citizens want the government to be more cost efficient. This view matches with the fact that the country is considered the most wasteful in government spending among the 10 countries on the WEF's Global Competitiveness Index 2012–13.

South Korea has a clear e-governance strategy with a detailed implementation plan, governance structure and expected results. The country's e-government has evolved from transactional to connected where it provides seamless online services and has a well-integrated back-office infrastructure. South Korea can take its journey forward toward an open and networked government, and a truly digital society in a cost-effective manner.

Current achievements

Dream-wings Online Learning Portal

Dream-wings won the 2011 United Nations Public Service Award.

Dream-wings is an online learning portal run by the Gyeonggi Women's Development Center. Funded by the Korean government, it offers e-learning services and

more than 300 courses in office work, healthcare, social welfare, IT and foreign languages. The portal started off in 2004 as a local website built for women in Gyeonggi Province and was expanded nationwide in 2011.

The portal expanded its services in 2010 to include complete career development support and diagnostic services such as competency and employability diagnosis that calculates the employability of a job seeker in a four-step process: employment diagnosis, professional diagnosis, aptitude tests and occupational competency tests.

Approximately 20,000 citizens have used the employability diagnosis service till date. The portal's mobile version, Smart Dream-wings, was released in 2012. Nearly 70 employee mentors provide one-on-one consulting services online to jobseekers. To date, the employee mentor program has helped 13,800 women; of which, 1,800 have realized their career aspirations and found jobs. The portal won the 2011 United Nations Public Service Award.⁴⁰

KONEPS: Korea Online E-procurement System

KONEPS has increased efficiency by reducing bid processing time from more than 30 hours to less than 2 hours.

KONEPS is an integrated e-procurement portal that consolidates 120 government procurement systems. The portal has a one-time registration for users participating in public bids and acts as a one-stop platform for users to complete all processes related to procurement

administration, registration, bidding, contract and payment. Information related to all public tender notices, including bidding and contracts and real-time tracking of the procurement process, is published on the portal. The portal also allows users to access the standardized catalogue and download electronic forms. The suppliers who use KONEPS receive discounts on service fees.

The automated system has significantly reduced the need for face-to-face meetings and increased efficiency by reducing the bid processing time from more than 30 hours to less than 2 hours. This enhanced transparency in public tenders and contract awards helps save US\$8 billion transaction costs annually and reduce paper document submissions by 7.8 million pages per year.

KONEPS is used by 45,000 public entities and 244,000 suppliers. Transactions worth nearly US\$101 billion were processed through KONEPS in 2012, which is 66 percent of Korea's public procurement transactions.⁴¹

Governmentwide Enterprise Architecture (GEA)

The GEA helped save US\$240 million between 2009 and 2011 by effectively managing ICT investments in software and hardware.

The GEA assimilates cross-government services into an integrated platform for citizens, businesses and government agencies. It features a standardized e-catalogue system. Its e-authentication and e-signature system has addressed difficulties with supplier identification and credit verification. The

GEA has helped reduce business processes from 75 stages to just 15 and cut processing time from four weeks to one week.

As of October 2012, 15,000 e-government systems belonging to 1,400 public institutions have been integrated into the GEA. The GEA helped save US\$240 million between 2009 and 2011 by effectively managing ICT investments in software and hardware. The architecture has helped improve transparency and accountability in public investments.⁴²

⁴⁰Source: <http://www.dream.go.kr/>

⁴¹Source: <http://www.g2b.go.kr/index.jsp>, <http://www.oecd.org/gov/ethics/Public-procurement-workshop-Kuwait-Korea-2-June-2013.pdf>

⁴²Source: <http://workspace.unpan.org/sites/Internet/Documents/UNPAN90678.pdf>

Annexure 1: Methodological Framework of Our Research

We used our experience of working with global public service entities to anchor a comprehensive in-depth research across 10 countries.

To measure Citizen Service Experience, Accenture appraised government's public service programs in a quantitative manner for the 10 countries by evaluating only those services offered at a federal or central-government level to ensure our analysis of the services was directly comparable across countries. Accenture researchers emulated businesses and service users, and attempted to fulfil service needs that typically might be provided at this level.

For measuring citizen satisfaction levels, Accenture conducted an online survey of 5,000 citizens across the 10 countries.

Research approach and methodology

For the research, we followed a four-step process:

1. Establish hypotheses on Citizen Service Experience of the digital government's performance and citizen satisfaction levels.

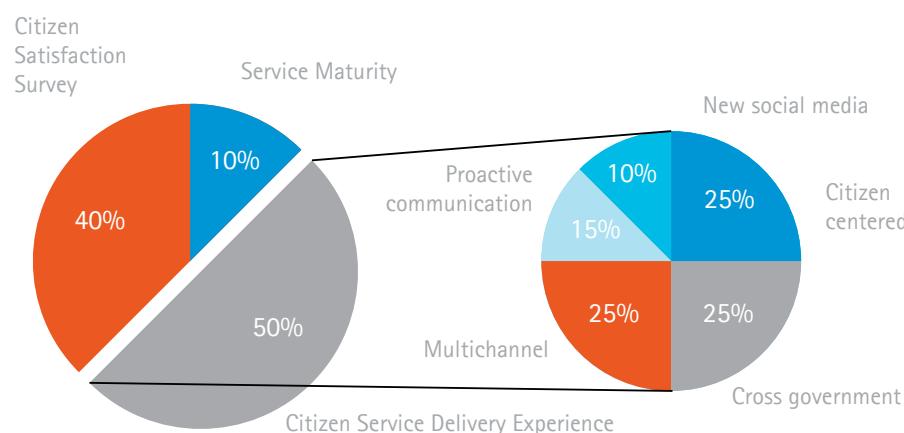
2. Collect survey responses from citizens who use online digital platforms.
3. Analyze digital government's performance metrics and Citizen Satisfaction Survey findings.
4. Aggregate findings from the Citizen Satisfaction Survey results and Citizen Service Experience into an overall ranking for the country with supporting insights.

The research is based on three components under Citizen Service Experience, which provide the overall ranking for a country—Citizen Satisfaction Survey (demand side), Service Maturity (supply side) and Citizen Service Delivery Experience (supply side) (Figure 53).

- **Overall Ranking in Citizen Service Experience** is measured through three key components, each carrying a weight based on their relevance to the overall digital government performance to arrive at an integrated score.
 - **Citizen Satisfaction Survey (CSS)** carries a weight of 40 percent within Citizen Service Experience. Citizens are the end users of public services with

Figure 53: Components of the digital government performance score

Citizen Service Experience



strong opinions about the role of their governments in providing excellence in services, and their voices carry a lot of weight. These views have been quantified and incorporated in the scoring

- **Service Maturity (SM)** measures the level to which a government has developed an online presence as an indicator. The importance of this factor has decreased over the years since e-governments have become ubiquitous and less of a differentiator among countries. However, given e-government's continued importance as the primary vehicle for self-service, we have assigned it a 10 percent weight in our rankings.

For the purpose of this research, Service Maturity has been measured in three levels of capability: publish, interact and transact.

The scoring classification is:

- **Publish services** or services for which the citizen does not communicate electronically with the government agency and the agency does not communicate with the citizen (other than by publishing information on its website).
- **Interact services** or services where the citizen must be able to communicate electronically with the government agency but the agency does not necessarily communicate with the citizen.
- **Transact services** or services for which the citizen must be able to communicate electronically with the government agency and the agency must be able to respond electronically to the citizen.

Service Maturity is measured in a two-stage process:

1. Define whether the service by the particular government or government agency is at the publish, interact or transact level of capability. The levels of capability are additive. That is, for a service to be at the interact level, it must first satisfy all the requirements of the publish level. If a service is at the transact level, it must satisfy all the requirements of the publish and interact levels.

There is a theoretical maximum level that each particular service can attain. For example, certain

government services are inherently meant to publish information no matter how sophisticated the government or government agency is and, thus, should not be rated higher than "publish." Individual services are likely to fall below the theoretical maximum level. For instance, a service with a maximum theoretical level of publish might only be in the publish category in a particular government or government agency and should be designated as such.

2. Assess the service and give it a score from 1 to 9, following the guidelines for whether the service is at publish, interact or transact level.

- 1-3 represents a service implemented with a publish level of capability
- 4-6 represents interact
- 7-9 represents transact

For example, all services found on the Internet must have a rating of at least 1. This is because by virtue of being on the Internet they have a publish component.

Scoring when no service is provided

In some countries, the services being researched may not be offered at the national/federal level, may not be relevant to that country or may be offered at a regional level (such as at the state, local council, or prefecture level) rather than at a federal/national level. There are two scoring options for such services:

- (-1) should be recorded if the service is not provided at the national level, either because it is provided at another level or because it is not relevant to that country. A (-1) score will not count against the country, as it is simply indicates that the question should not be taken into the Service Maturity calculations. For example, on the question "Can you view local train schedules?" the UK receives (-1) because the private sector provides this service. Similarly, in response to the question "Can a parent interact with teachers?" Singapore receives (-1) because this is a service provided at the local level, not the national level.
- (0) indicates that a service is delivered by the government at a national/federal level but is not offered electronically.

- **Citizen Service Delivery Experience (CSDE)** carries a weight of 50 percent, and measures the extent to which government agencies manage interactions with their customers—citizens and businesses—and deliver service in an integrated way. The Citizen Service Delivery Experience score considers how well governments have addressed the five pillars of leadership in customer service—citizen-centered, multichannel and cross-government service delivery, proactive communication and education, and social media. In general, each service was scored within each pillar on a scale of 1 to 4. The pillars, their scoring classifications and their relative weights are (Figure 54):

- **Citizen-centered interaction:** This pillar measures the extent to which the government creates a relevant, personalized experience for the citizen by understanding who they are and anticipating their needs. (25 percent)
- **Cross-government service interaction:** This pillar measures the extent to which the boundaries of government agencies and departments are invisible to the citizen, and the extent to which the citizen can interact with multiple agencies across different jurisdictions in a seamless and transparent manner. (25 percent)
- **Multichannel service delivery:** This pillar measures the extent to which service delivery channels are integrated to deliver uniform information and a consistent citizen experience in a comprehensive and timely manner. (25 percent)

- **Proactive communication and education:** The purpose of this pillar is to address the extent to which the government actively informs and educates citizens about current service offerings so that citizens can make the most of them. (15 percent)
- **Social media:** The purpose of this pillar is to reflect the level of expansion of social media and its use by the government. (10 percent)

In the end, the scores for each of the three factors (Citizen Satisfaction Survey, Service Maturity, Citizen Service Delivery Experience) were normalized and then aggregated. That is, they were converted into a normal distribution based on the mean and standard deviation of the raw scores. This step ensured that the range of scores for each factor was taken into consideration in the final calculation.

Finally, we used the **Digital Maturity** dimension as a lens to view the digital governments' rankings. Digital Maturity compares the digital government initiatives of countries relative to one another instead of being an absolute measurement through a range of quantitative and qualitative variables across the key outcome areas in digital government public service delivery. The 10 countries were classified into three categories—based on their economic development, resilience in the face of volatility and government spending—and depending on which category it belonged to, we mapped and evaluated the country's digital maturity journey to deliver public service for the future (Figure 55).

Figure 54: Citizen Service Delivery Experience scoring classifications

Pillar	Scoring Classification					
	-1	0	1	2	3	4
1. Citizen-centered interaction		Service does not exhibit basic characteristics illustrated under score 1	Program-centric customer experience	Customer group segmentation	Individual segmentation	Intelligent interaction
2. Cross-government service interaction	Pre-populated. The service is not applicable for cross-government interaction	Service does not exhibit basic characteristics illustrated under score 1	Basic interaction	Intra-agency interaction	Cross-agency interaction	Cross-government interaction
3. Multichannel service delivery		Service does not exhibit basic characteristics illustrated under score 1	Basic access	Consistent multichannel experience	Channel synchronization and case management	Seamless service delivery
4. Proactive communication and education		Service does not exhibit basic characteristics illustrated under score 1	Program offering	Proactive service offering	Targeted offerings	Mutual value offerings
5. Social media		Service does not exhibit basic characteristics illustrated under score 1	Social presence but not updated	Social media presence in a holistic set of social media	Social media implemented, but not being widely used	Social media implemented, and being widely used

Cutters

Cutters are developed economies severely affected by the current global volatility, which focus on reducing government expenditure to balance their budgets. Their characteristics include low or negative gross domestic product (GDP) growth, high per capita GDP, a high budget deficit and moderate growth in government ICT spending.

Builders

Builders are developing economies that are growing fast and seeking to build infrastructure to serve

their economies and society well in the future. Their characteristics include high GDP growth, low per capita GDP, moderate budget deficit and high growth in government ICT spending.

Enhancers

Enhancers are developed economies that have shown resilience to the financial crisis due to the favorable structure of their economy or strong fiscal positions. Their typical characteristics include moderate GDP growth, high per capita GDP, low budget deficit or budget surplus, and moderate growth in government ICT spending.

Figure 55: Country categories: Cutters, Builders and Enhancers

Cutters



High GDP and public debt
Base digital infrastructure in place
Focus on reducing government expenditure to balance the budget

Countries: [United Kingdom and United States](#)

Builders



Growing GDP and low public debt
Base digital infrastructure in place
Seek to build infrastructure to serve their economies and societies in the future

Countries: [Brazil, India, Saudi Arabia and United Arab Emirates](#)

Enhancers



High GDP but low public debt
Base digital infrastructure ready
Potential for digital capability enhancement given the strength of the economy

Countries: [Germany, Norway, Singapore and South Korea](#)

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- 7 <http://www.accenture.com/SiteCollectionDocuments/PDF/Preparing-Police-Services-Future.pdf>
- 8 As stated on page 32 of <http://www.accenture.com/gb-en/Pages/insight-creating-shared-responsibility-better-outcomes.aspx>
- 9 <https://www.nav.no/English/The+Norwegian+Labour+and+Welfare+Administration/Organization>
- 10 As stated in the Overview and About sections of <https://www.reach.gov.sg/default.aspx>; http://app.sgdi.gov.sg/listing.asp?agency_subtype=dept&agency_id=0000022151; and <http://www.gov.sg/>
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