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The Arab Government Services Outlook 2014

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Prepared by

كلية محمد بن راشد
للإدارة الحكومية
MOHAMMED BIN RASHID
SCHOOL OF GOVERNMENT

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Introduction

Rising citizen expectations have made efficient, relevant, quality public sector services the key government 'products' requested by public service 'customers'. In the Arab world, enhancing the quality, efficiency and accessibility of public sector services requires government institutions to apply creative approaches to service design and delivery processes. Fostering a citizen-centric culture in the design and delivery of public services in the Arab region can potentially create new and locally-fitting solutions to public services challenges, as well as improving quality of services related to education, unemployment, and social affairs among others.

Despite the wide acceptance of the need for enhanced services in the Arab World, efforts to understand the intricacies of public service development are limited, especially on a regional level. For this reason, the Governance and Innovation Program at the Mohammed bin Rashid School of Government conducted regional research examining the state of public services in the Arab world. This report aims to improve understanding of public service delivery in the Arab region by providing a broad view of service delivery environments, outputs and enablers; as well as regional challenges and strengths, and the overall quality of public services in the Arab world.

This report is comprised of two main components*:

• The results of a survey of key official Arab government entities which focused on internal service delivery activities of government organizations.

• The results of an Arab regional 'customer' satisfaction survey which focused on customer experience and satisfaction with public services.

While Arab countries share many traits, challenges and opportunities in terms of service delivery, there is clear diversity in many environmental contexts affecting the public sector. Factors such as wealth, population sizes, geography, and social conditions affect service delivery in each of these countries differently. As such, the analysis of the regional findings was supplanted with an analysis of survey findings across three groups -using Gross National Product (GNP) classifications used by the World Bank [1-2]:

• Lower-middle income: Egypt, Mauritania, Morocco, Palestine, Sudan, Syria, Yemen
• Upper-Middle income: Algeria, Iraq, Jordan, Lebanon, Libya, Tunisia
• High income: Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, UAE

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[1] World Bank classifications were used because they are one of the most frequently cited income-based classifications in development studies, scholarly circles and international organizations. More information on World Bank classifications available at: http://data.worldbank.org/about/country-classifications

[2] Low income countries in the Arab world (Comoros, Djibouti, Somalia) were not included in this study due to a low response rate to the survey.

* Additionally, a showcase of selected practices on innovations in government service design and delivery in the form of case studies from around the Arab world is published as complementary publications. See: "Innovations from Across the Arab World: Making Government "Smarter", Cutting Red-tape, and Creating Value Partnerships". (Eds.) Fadi Salem with Racha Mourtada and Sarah Alshaer, The 2nd Government Summit 2014. Dubai: Governance and Innovation Program, MBR School of Government.

What Arab Governments Need to Know About Government Services

1. Services that are designed using customer input and feedback are seen as more relevant and of better quality

Respondents to the public survey indicated higher levels of satisfaction with services on which their feedback and input was elicited. Despite the strong co-relation between service satisfaction and customer input, the survey showed a gap in government needs assessment initiatives. Less than 25% of public services customers in high income countries reported being asked for their input when designing or delivering services, this percentage drops to below 15% in middle income countries. However, amongst those who were being asked for their feedback and input into the service design and delivery process, satisfaction with services was noticeably higher.

2. The adoption of electronic services across the Arab world has positively impacted service accessibility, efficiency and quality. Most Arab governments, however, are yet to transition to m-services and have as a result, not reaped the benefits

Arab governments are integrating ICT into service delivery at different rates. While all countries in the Arab world have provided at least a baseline of e-government services, the provision of mobile applications and social media channels for service delivery have not yet been integrated to their full potential. Though high income countries are adopting social networking platforms and mobile applications in public services at a higher rate than their middle income peers, there is still a lot of room for growth.

3. Effective and efficient delivery of government services continues to pose a challenge to governments across the region. A number of initiatives are in place to develop innovative means of addressing these issues and challenges.

By and large, satisfaction with government services in the Arab world is low. Government responses to the survey indicate concerted efforts by governments to address these challenges, which are pressing. However, there are differences in responses across country classifications – residents of high income countries showed higher levels of satisfaction than residents of middle income countries.

4. Across the board, public works and public transportation emerged as priority sectors for improvements for Arab governments

Survey results uncovered some sectors that are in most need of improvement and investment. Public transportation emerged as priority area for improvement across all three country groupings, with cultural services and education emerging as priorities for high income countries, and public healthcare for lower middle income countries.

Priority Government Service Sectors in Need of Improvement

a. **High income Countries:** Public transportation, Cultural services and Education
b. **Upper middle income countries:** Public transportation, Public works, and Cultural services
c. **Lower middle income countries:** Public healthcare, Public works and Public transportation.

What Government Told Us about Government Services

1. Capacity building of government employees is a key and common priority for governments across the region

Arab government respondents to the survey were asked their challenges and priority areas of focus moving forward. While differences were found around the availability of financial resources, respondents pinpointed the limited capacity and skills among government employees in areas related to public service design and delivery as a key challenge and area of focus.

Reflecting on the challenges to the provision of adequate training and capacity building programmes, Arab governments pointed to the entrenched bureaucracy and restrictive internal regulations that typically hinder the provision of training for government employees. The lack of impact assessment frameworks for capacity building programs was also seen as a hurdle to their implementation.

Arab governments of high GNP countries indicated that sufficient funding is allocated for the various processes of service design and delivery, be it assessing citizens' needs, evaluating services, investing in service innovation initiatives, or procuring and adopting ICT for service design and delivery. Responding governments in middle GNP countries, however, highlighted the lack of funding for these processes as a key challenge to the improvement of public services.

2. Efforts by Arab governments to strengthen and improve citizen engagement on the design and delivery of services are limited by the technical capacity and prevailing culture in government institutions

Assessing customer needs is the first and crucial step in designing successful public services. Needs assessment is important for fulfilling the goals of citizen-centricity and for overcoming service delivery challenges. Services which have been designed by incorporating the voices of customers are more likely to fulfill their needs and expectations

Arab governments are increasingly adopting several tools and methods to engage with their citizens, including customer surveys, informing citizens of service improvements and re-designs, inviting their feedback on service design, and running focus groups on service design or delivery. Beyond these methods of citizen engagement, responding Arab governments also indicated that technological resources are available and are being utilized to assess citizen needs when it comes to public service delivery, and consider them a key strength in their efforts to engage with citizens and solicit their feedback.

Despite the availability of a foundation for citizen engagement as indicated by responding governments, the levels of citizen engagement for the purpose of public service needs' assessment remains relatively low. This was acknowledged by the priority areas for improvement, as identified by responding Arab governments. Underqualified government employees in the areas of customer engagement were identified as a key priority across the Arab region. The lack of a receptive culture in government agencies towards customer engagement was another. Financial resources were a point of diversion between high and middle GNP countries, with the latter considering them a challenge, and the former a strength in their customer engagement efforts for service design and delivery.

Other factors limiting citizen engagement around government services, according to official responses across both GNP groups in the Arab countries, was fear of critical feedback or adverse effects on organizational reputation. In some cases, government organizations believe that there are more pressing areas in need of investing government funds and resources.

3. Service delivery goals are clear among governments across the region, however, the benefits of evaluating service delivery are not ...

All responding governments in the Arab countries indicated

the existence of central entities mandated with monitoring and evaluating public services. Additionally, service delivery goals and standards are clearly communicated across government agencies in these Arab countries.

Despite this, improving service delivery across the Arab region faces several challenges in the areas of monitoring and evaluation. A key obstacle identified by the survey is that the benefits of monitoring and evaluating public service design and delivery are unclear to government agencies and employees in the Arab region. Governments in middle GNP countries also indicated that government agencies lack official guidelines mandating monitoring and evaluation.

A shortage of qualified government employees in monitoring and evaluation is another main challenge faced by governments in Arab countries. This is coupled with a prevalent poor evaluation culture across the government. As with other areas of service delivery, lack of funding for service

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Monitoring and Evaluating Public Service Delivery in the Arab World

- Central entities that are mandated with monitoring or evaluating public services exist in all Arab Governments surveyed
- The most commonly evaluated aspects of public service delivery by government organizations in the Arab world are:
    » Public services efficiency
    » Customer experience and satisfaction

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delivery monitoring and evaluation only poses an issue for Arab governments in middle GNP countries.

4. Innovation in public services is backed by leadership, but prevalent risk-averse and silo cultures across government agencies are a deterrent

Innovation in public service design and delivery – in terms of

creating new services or improving existing ones - is strongly supported by the leadership and effective implementation of enabling technologies in responding Arab governments. High GNP Arab governments also maintained that a strong enabler lies in having sufficient monetary and technological resources allocated for innovating in service design and delivery. Meanwhile, middle GNP Arab governments highlighted the availability of appropriate regulatory frameworks as key for fostering innovation in service design and delivery across government.

Arab governments in our survey indicated that improvements in several aspects of the public service delivery cycle have been achieved over the past five years, including in methods of interacting with citizens, service organizational structures, channels of providing public services as well as in support activities.

However, despite the improvements achieved, governments in Arab countries face several hurdles in their strive for more innovative public services. Beyond the lack of relevant skills and qualifications - a pressing issue for governments across the region – governments in high GNP countries highlighted that working in silos, rather than in collaboration, is a prevalent modus operandi that hinders innovation across government agencies; a recurring symptom among highly competitive public service environments[3] . Meanwhile governments in

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Innovation in Public Service Delivery

- The aspects of public service delivery most improved by government organizations in the Arab world over the past five years are:
    » The methods of interacting with customers
    » The methods of providing services

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middle GNP countries highlighted the risk-averse culture within and across government agencies that is not conducive to innovation nor collaboration in public service delivery.

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[3] Government 2.0? Technology, Trust and Collaboration in the UAE Public Sector. Policy and Internet Journal, 2, 34. SALEM, F. & JARRAR, Y. (2010).

5. Information and communication technologies are increasingly being streamlined into Arab governments' public services frameworks, but are hindered by lack of capacity and the appropriate regulatory frameworks

A fundamental part of citizen centricity is incorporating technology enablers into service design in order to enhance easy, timely and convenient access to services. ICT adoption reduces the cost of service delivery, improves access to information, reduces time required to deliver services, increases accessibility to services, improves public administration, and facilitates customer engagement. ICT adoption is also crucial for multi-channel service delivery, which in turn, is essential for citizen-centric services and the accessibility of traditionally marginalized customers to services.

Arab governments boast a clear government mandate for the adoption of ICT for public services delivery. Furthermore, across the region, ICT initiatives have been aligned within overall government frameworks for public services. In high GNP countries, specifically, government funding for ICT procurement towards service design, delivery and improvement is strong. Governments in middle GNP countries, view the maturity of ICT infrastructure as key to the integration of ICT in public service design and delivery.

The development of regulatory frameworks for ICT-enabled services was highlighted as a priority area for governments in Arab countries, when it comes to integrating ICT into public service design and delivery. As with other areas of service design and delivery, ICT adoption suffers from a lack of relevant skills among government employees across government agencies.

What Customers told us about Government Services

Regional Trends: Customer Engagement, eGoverrnment and Priority Sectors

- Customers who were asked for feedback and input on government services were more satisfied with the quality, efficiency and accessibility of services. The potential is high for Arab governments and customers to engage around citizen needs on public services.
- eGovernment has enabled better accessibility, quality and efficiency of services. Customers who used government websites to access public services were more satisfied with government services than customers who only had access to public services through traditional means.
- Of the government service sectors in need of improvement, two priorities have emerged: Public Transportation and Public Works. Additionally, middle GNP countries also identified Public Healthcare as a vsector in need for improvement.

1. There is strong room for Arab governments and customers to engage around service needs and expectations

Customer needs assessment in the Arab world was relatively more common in high income countries than in middle income countries. There was also a strong variance in the methods used for engagement in each of the three country income brackets. While traditional media was used across all country income brackets for the announcement of information about services by the government, the methods used for soliciting feedback differed between them. Overall, communication between governments and their customers was relatively low, suggesting a need to strengthen awareness of government services, and communication channels around their design and delivery. This is particularly important in light of the strong co-relation the survey demonstrated between customer engagement on services and satisfaction with their delivery. Service ratings submitted by customers who said

that their governments regularly asked them for suggestions and input into the service design process were considerably higher than those submitted by their counterparts who said that they were never asked for input (Figure 1).

Regardless of income classification, customer engagement rates for the purpose of needs assessment all over the Arab world were low. Even amongst high income countries where customer engagement was relatively more frequent, less than 25% of respondents indicated that their governments ask them for feedback on public services. In the middle income countries only 15% or less of respondents are regularly engaged for feedback on services (Figure 2). Given that the survey was primarily conducted among the sections in the population with access to the internet[4] , it is safe to conclude that the actual rates are much lower among the other segments of the population which lack access to ICT-enabled channels of engagement.

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[4] Number of internet users in the Arab world is estimated at 125 million in 2013. Source: "The Arab World Online: Trends in Internet Usage in the Arab Region" (2013). Governance and Innovation Program. Dubai School of Government, Dubai

Figure No. 1
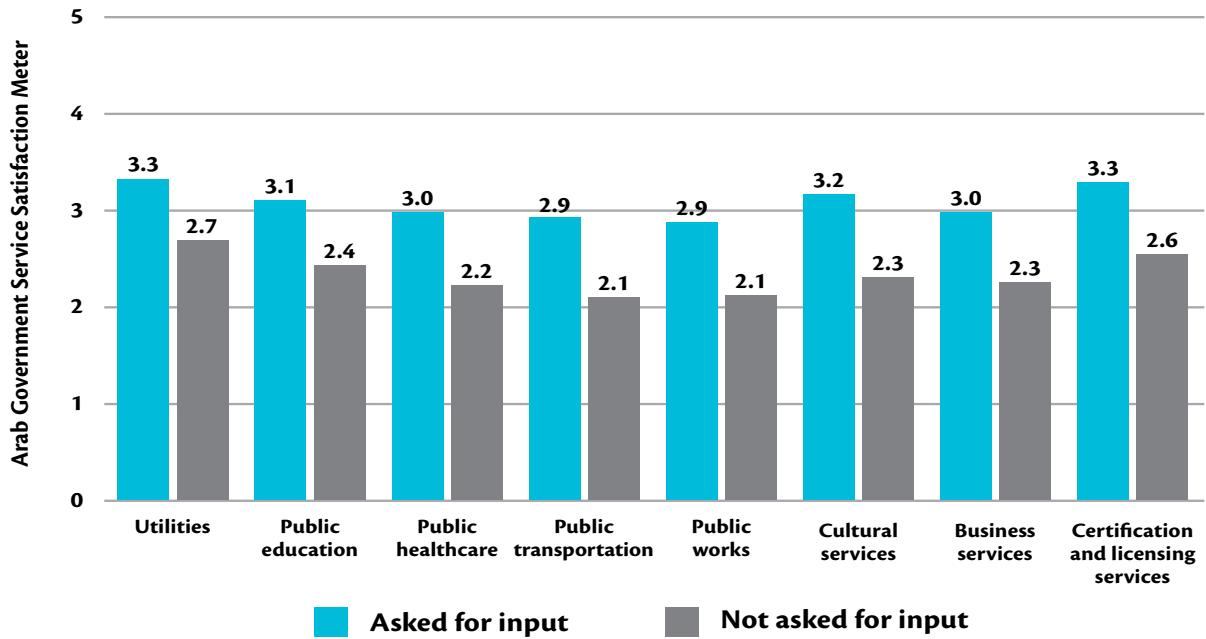### Impact of Asking Customers for Input on their Satisfaction with Public Services

Arab Government Service Satisfaction Meter

Category	Asked for input	Not asked for input
Utilities	3.3	2.7
Public education	3.1	2.4
Public healthcare	3.0	2.2
Public transportation	2.9	2.1
Public works	2.9	2.1
Cultural services	3.2	2.3
Business services	3.0	2.3
Certification and licensing services	3.3	2.6

Asked for input   Not asked for input

Figure No. 2
Government regularly invites feedback on services

Method	Lower middle income Countries	Upper middle income Countries	High income Countries
Other ways	8%	10%	9%
Contact me directly (through my email, my phone, SMS, etc..)	3%	5%	13%
Using traditional media television radio newspapers etc	12%	15%	19%
Through focus groups or surveys	4%	9%	23%
Online government websites social media etc	7%	9%	23%

Legend:
- High income Countries
- Upper middle income Countries
- Lower middle income Countries

Figure No. 3
My government regularly invites suggestions and ideas on service delivery

Legend:
- High income Countries
- Upper middle income Countries
- Lower middle income Countries

	Online government websites social media etc	Other ways	Through focus groups or surveys	Information on government services is extremely limited or unavailable	Contacts me directly (through my email, my phone, SMS, etc..)	Using traditional media television radio newspapers etc
Lower middle income	7%	9%	4%	9%	3%	12%
Upper middle income	9%	9%	4%	9%	4%	15%
High income	22%	11%	8%	11%	11%	19%

Figure No. 4
Government regularly announces information about services ranked by high GNP countries

Legend:
- High income Countries
- Upper middle income Countries
- Lower middle income Countries

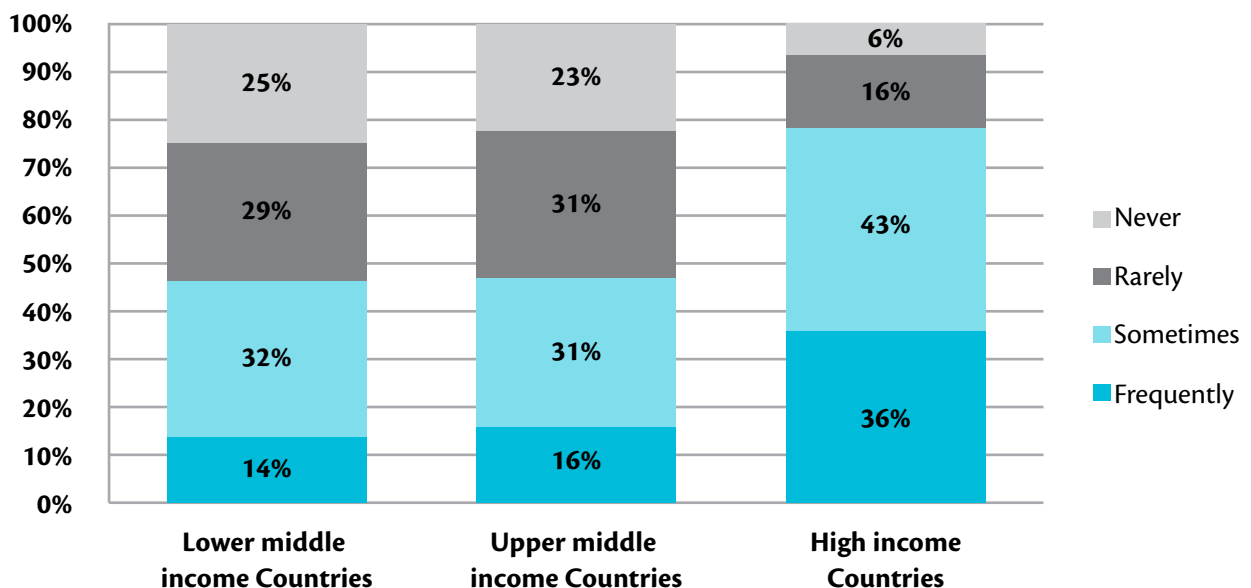|	Other ways	Contact me directly (through my email, my phone, SMS, etc..)	Through focus groups or surveys	Online government websites social media etc	Using traditional media television radio newspapers etc
Lower middle income	7%	4%	3%	15%	39%
Upper middle income	8%	8%	18%	18%	41%
High income	8%	20%	37%	37%	43%

2- Technology has enabled better accessibility across the region, efficiency and quality of government services

ICT integration in public service delivery in Arab countries varied between the country classifications. The percentage of respondents who said that they frequently use government websites was significantly higher in countries within the higher GNP bracket. This can be explained by the availability and readiness of electronic government services in such countries as well as the higher internet and ICT penetration rates[5]. 36% of customers in high GNP countries frequently used government websites while only 16% and 14% of customers used them in upper-middle and lower-middle GNP countries respectively (Figure 5). Satisfaction with these services was also higher in high income countries than middle income countries. 22% and 23% of customers in lower middle and upper middle GNP countries reported being satisfied with

government websites, while 56% of customers in high GNP countries reported the same (Figure 6). This corresponds with e-government maturity in these country classifications where lower middle and upper middle GNP countries rank lower on the UN E-government Index[6].

Figure No. 5
Do you use the following platform to access government services?
Government Websites

[5] UNDESA. E-Government Survey 2012: United Nations Department of Economic and Social Affairs, 2012. Print.

[6] Ibid.

Figure No. 6
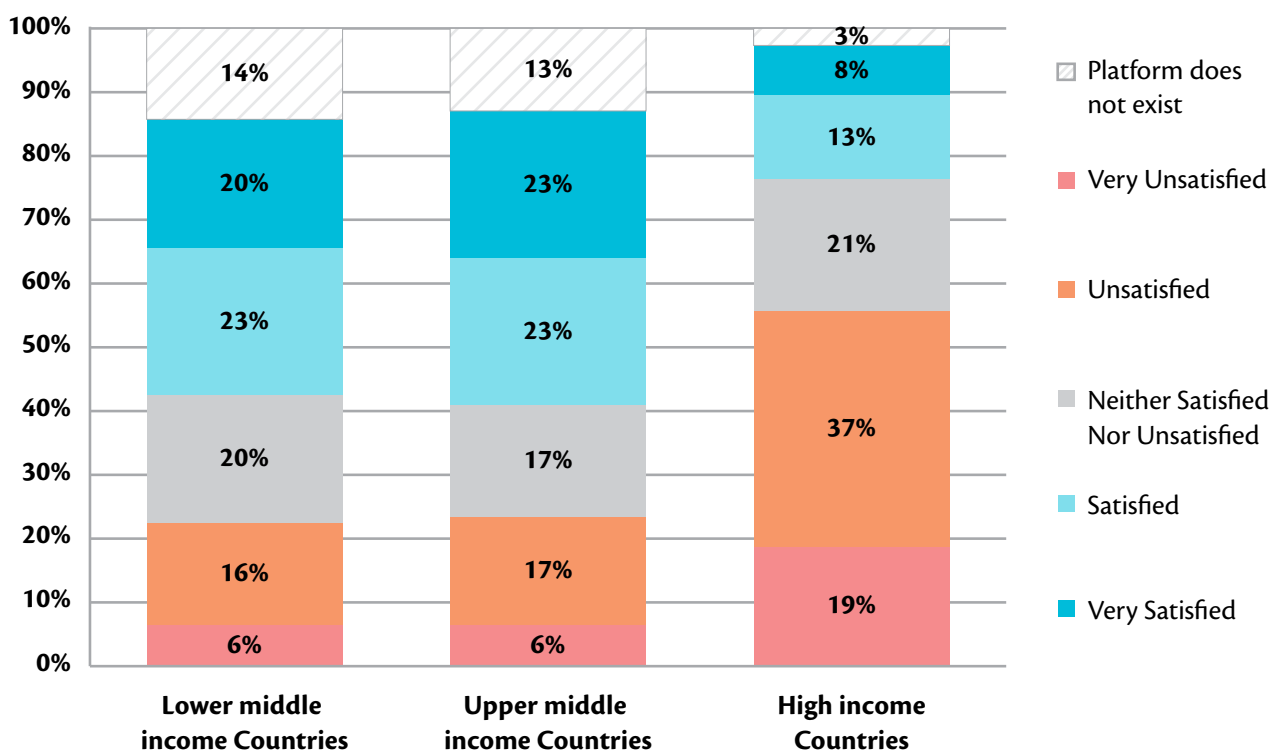### Satisfaction with government websites for service delivery

Legend:
- Platform does not exist
- Very Unsatisfied
- Unsatisfied
- Neither Satisfied Nor Unsatisfied
- Satisfied
- Very Satisfied

Lower middle income Countries: 6%, 16%, 20%, 23%, 20%, 14%
Upper middle income Countries: 6%, 17%, 17%, 23%, 23%, 13%
High income Countries: 19%, 37%, 21%, 13%, 8%, 3%

Figure No. 7
Impact of eGovernment on Government Service Satisfaction

- Website Users
- Non - Website Users

Arab Government Service Satisfaction Meter

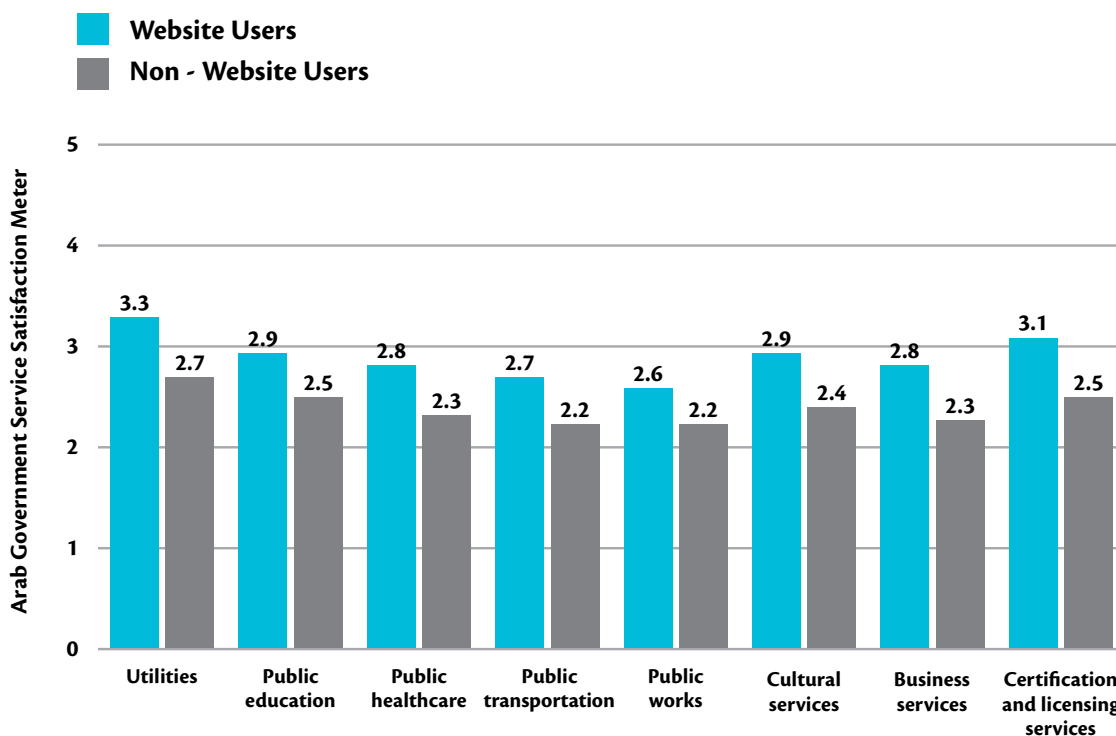| Sector	Website Users	Non-Website Users
Utilities	3.3	2.7
Public education	2.9	2.5
Public healthcare	2.8	2.3
Public transportation	2.7	2.2
Public works	2.6	2.2
Cultural services	2.9	2.4
Business services	2.8	2.3
Certification and licensing services	3.1	2.5

Figure 7: Across the board there was a clear discrepancy in satisfaction between those who do use ICT and those who do not. Amongst all countries, respondents rated services an average of 0.4 points higher if they did use government websites. Notable differences can be seen in some of the most important sectors such as public healthcare, public transportation, public education and public works.

While the uptake of m-government services was relatively low across all country GNP groups, similar to website usage, customers in high GNP countries used government mobile applications more frequently and reported being more satisfied with them. Only 14% of customers in high GNP countries used mobile applications "frequently", while only 5% and 6% used them in upper middle and lower middle GNP countries respectively (Figure 8). Similarly, only 12% and 11% of lower middle and upper middle GNP country customers are satisfied with government mobile applications and 36% of high income country customers reported the same (Figure 9). While social media accounts are used more frequently than mobile applications to access public services in the

Arab world, according to survey respondents, they are also not being utilized enough for service delivery, with only 14% using them frequently in high income countries and 11% and 9% using them in upper-middle and lower-middle income countries (Figure 10). Noticeably, in middle income countries, those who said that they never access mobile services to access government services are higher (60% in average) than those who said they never use social media services for accessing government services (40%) (Figures 8 and 11).

Figure No. 8
Do you use the following platform to access government services?
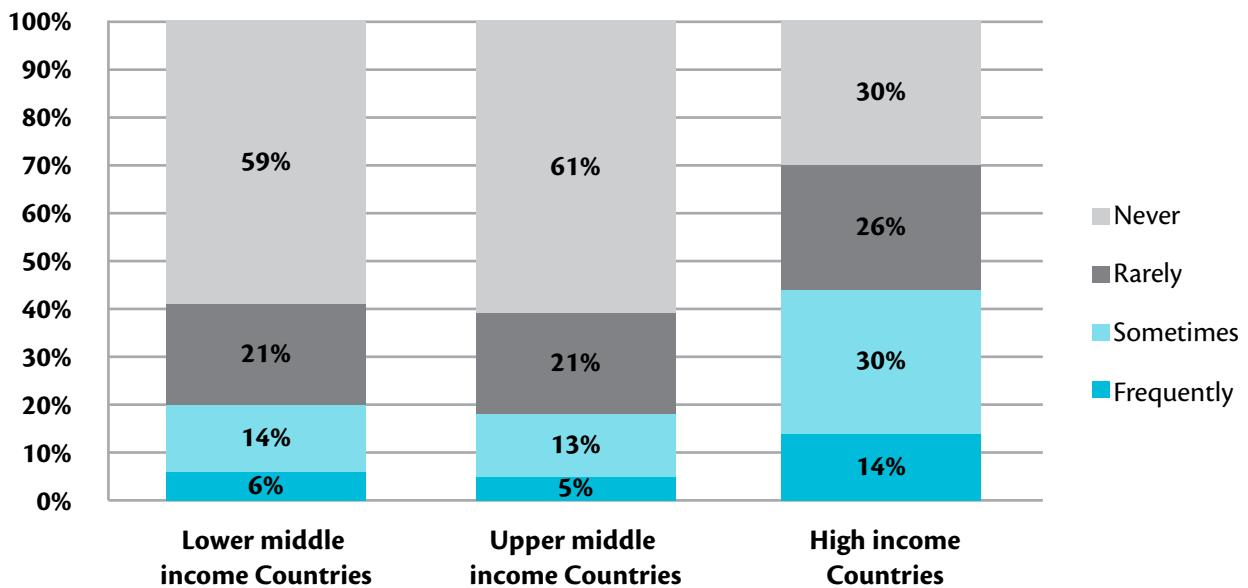Government Mobile Applications

Figure No. 9
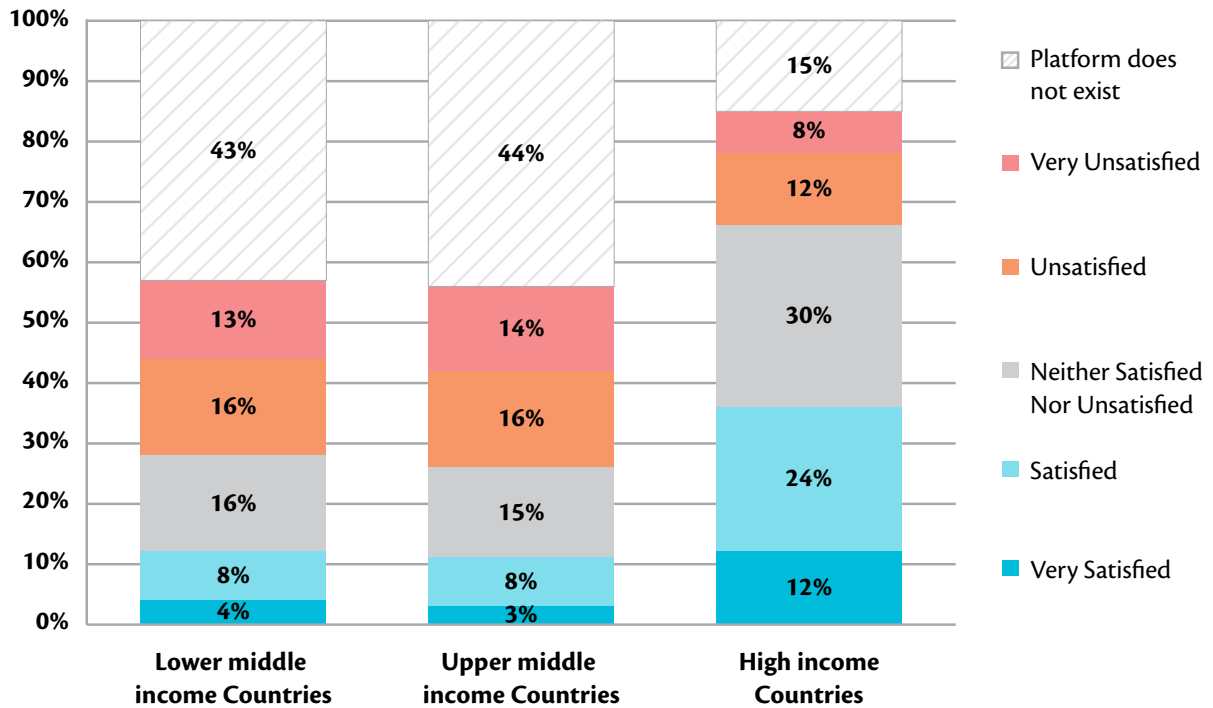### Satisfaction with Government Mobile Apps for service delivery

Lower middle income Countries
- Platform does not exist: 43%
- Very Unsatisfied: 13%
- Unsatisfied: 16%
- Neither Satisfied Nor Unsatisfied: 16%
- Satisfied: 8%
- Very Satisfied: 4%

Upper middle income Countries
- Platform does not exist: 44%
- Very Unsatisfied: 14%
- Unsatisfied: 16%
- Neither Satisfied Nor Unsatisfied: 15%
- Satisfied: 8%
- Very Satisfied: 3%

High income Countries
- Platform does not exist: 15%
- Very Unsatisfied: 8%
- Unsatisfied: 12%
- Neither Satisfied Nor Unsatisfied: 30%
- Satisfied: 24%
- Very Satisfied: 12%

Figure No. 10
Do you use the following platform to access government services?
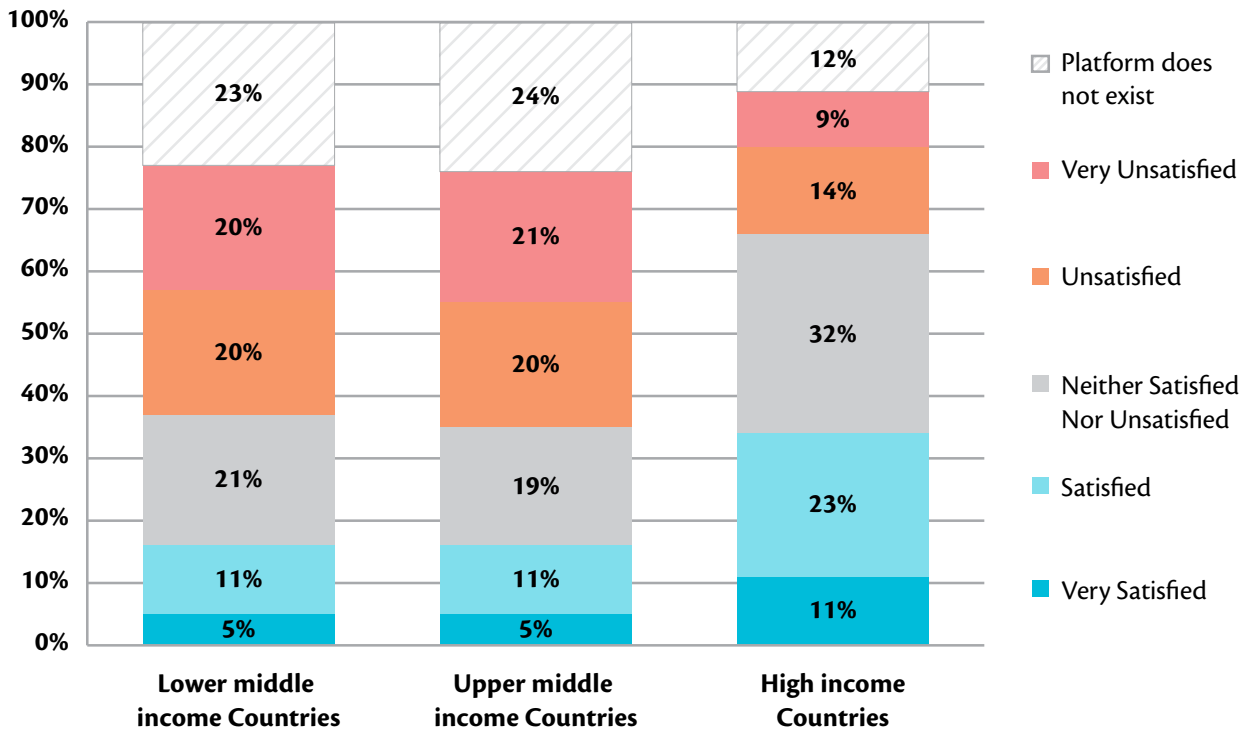Government Social Media Pages & Accounts

Lower middle income Countries
- Never: 40%
- Rarely: 27%
- Sometimes: 24%
- Frequently: 9%

Upper middle income Countries
- Never: 40%
- Rarely: 26%
- Sometimes: 23%
- Frequently: 11%

High income Countries
- Never: 30%
- Rarely: 26%
- Sometimes: 30%
- Frequently: 14%

Figure No. 11
Satisfaction with Government Social Media accounts for service delivery

Legend:
- Platform does not exist
- Very Unsatisfied
- Unsatisfied
- Neither Satisfied Nor Unsatisfied
- Satisfied
- Very Satisfied

Lower middle income Countries: Platform does not exist 23%, Very Unsatisfied 20%, Unsatisfied 20%, Neither Satisfied Nor Unsatisfied 21%, Satisfied 11%, Very Satisfied 5%

Upper middle income Countries: Platform does not exist 24%, Very Unsatisfied 21%, Unsatisfied 20%, Neither Satisfied Nor Unsatisfied 19%, Satisfied 11%, Very Satisfied 5%

High income Countries: Platform does not exist 12%, Very Unsatisfied 9%, Unsatisfied 14%, Neither Satisfied Nor Unsatisfied 32%, Satisfied 23%, Very Satisfied 11%

3 - Service delivery poses a major challenge to Arab governments – with some sectors requiring prioritization

Effective and efficient delivery of government services continues to pose a challenge to governments across the region. On a scale of 1 (lowest) to 5 (highest), all public service sectors received low ratings averaging 2.3 out of 5 (Figure 12).

Within the GNP groupings of "lower-middle", "upper-middle", and "high" used for the analysis of the survey, respondents in Morocco, Tunisia and the United Arab Emirates indicated the highest levels of satisfaction in each of the three groups respectively.

Figure No. 12
Satisfaction with Government Services in the Arab World
ranked by High Income Countries

Sector	Lower middle income Countries	Upper middle income Countries	High income Countries
Utilities	2.6	2.4	3.4
Certification and licensing services	2.5	2.5	3.0
Public healthcare	2.0	2.3	2.9
Public education	2.3	2.7	2.8
Public works	2.1	2.1	2.8
Business and enterprise services	2.3	2.2	2.8
Cultural services and tourism	2.5	2.2	2.7
Public transportation	2.1	2.2	2.5

Highest Satisfaction

Highest Satisfaction

Highest Satisfaction

Highest Public Services Satisfaction Ratings by GNP		
High income	Upper-middle income	Lower-middle income
UAE	Tunisia	Morocco

The survey revealed that, across the region, "utilities" ranked the highest among all service sectors (Figure 13). In terms of quality, "certification and licensing" services were ranked the highest, while in terms of accessibility, "public education", was ranked the highest; and finally, in terms of efficiency, "utilities" ranked the highest as well (Figures 14, 15, and 16). It is clear from these results that services, even if they are efficient or accessible, may not be of high quality. Public education, as a clear example, was rated the most accessible service, given that

public education is universally free in most Arab countries, but it still ranked very low in terms of quality and efficiency. Many respondents echoed these findings and indicated that despite being accessible, the quality of public healthcare and public education services was poor. The same trend can be seen in other services which were given high efficiency or quality ratings but low accessibility ratings.

Figure No. 13
Efficiency, Quality and Accessibility of Government Service in the Arab World

Legend: ■ Efficiency ■ Quality ■ Accessibility ■ Government Service Satisfaction Index

Figure No. 14
Average Quality Ratings across Service Sectors in the Arab Region

Service Sector	Rating
Public transportation	2.08
Public healthcare	2.11
Public works	2.12
Public education	2.24
Business and enterprise services	2.29
Cultural services and tourism	2.40
Utilities	2.52
Certification and licensing	2.56

Figure No. 15
Average Accessibility Ratings across Service Sectors in the Arab Region

Service Sector	Rating
Public works	2.19
Public healthcare	2.33
Business and enterprise services	2.33
Public transportation	2.35
Cultural services and tourism	2.44
Certification and licensing	2.61
Utilities	2.72
Public education	2.81

Average Efficiency Ratings across Service Sectors in the Arab Region

4 – Developing a customer-centric culture amongst front-line employees is a priority for enhancing the customer experience in government organizations

Reflecting on the growing trend to establish government service centers, the survey revealed that while the concept is well received, there is strong room to improve the quality of the services and the efficiency with which they are provided. Only 18% of respondents from lower middle GNP countries agreed that customers are treated with the necessary respect and empathy in government offices and only 22% of respondents

from middle GNP countries agreed to the same. High income countries fared better than middle income countries, but still did not achieve a majority customer satisfaction, with 36% of respondents from high GNP countries reporting being satisfied with government customer service (Figure 17). These qualms were reflected in the comments from respondents where hundreds of people from middle income, and high income countries anecdotally reported mediocre customer service at government customer centers. By and large, overly bureaucratic processes and poor customer service were some of the most common observations by respondents.

"All services are rooted in bureaucracy and this prevents the delivery of quality service to all"

"With regards to transaction and certification services, there is an amount of bureaucracy that is abnormally slow and more so there is unfamiliarity with the appropriate regulations and standards"

Figure No. 17

Customer service at government centers and offices is good and customers are treated with the necessary respect and empathy
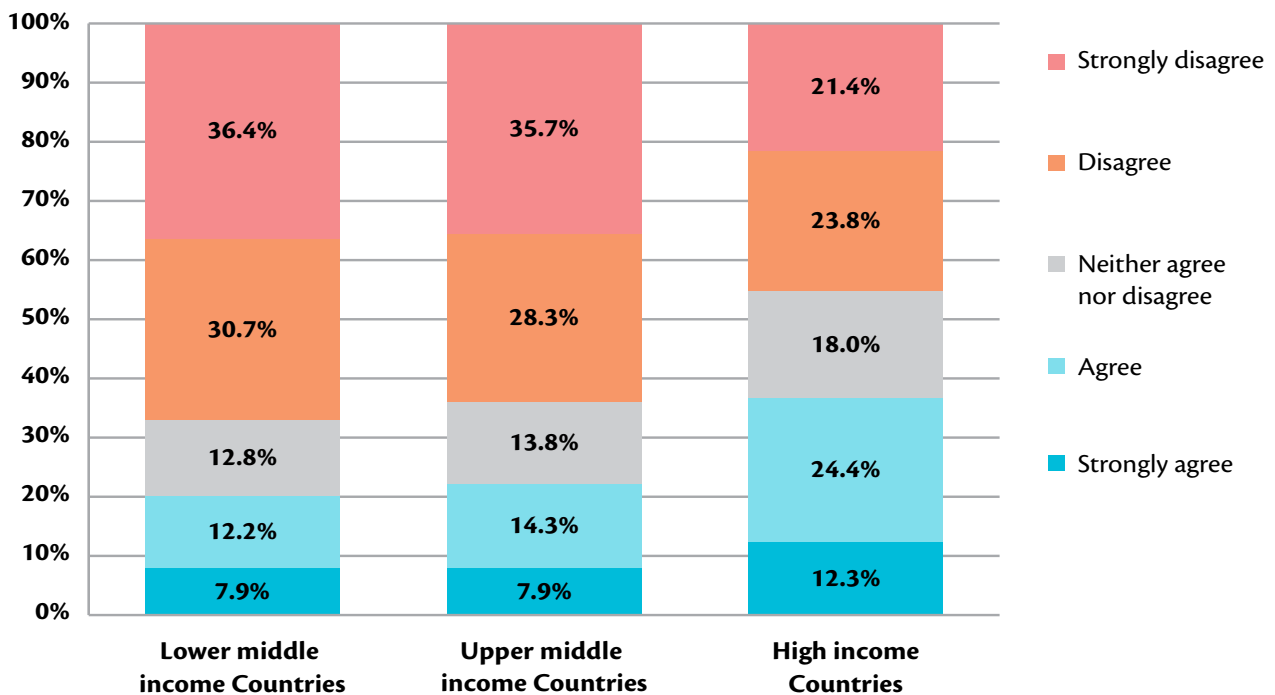
5 – Bureaucracy and red-tape lead to inefficiencies and government waste, greatly impacting the convenience and relevance of the services provided to the citizens

Cumbersome policies and procedures greatly impact the customer experience and limit the ability of front line employees to provide services in an effective and friendly manner. Efficiency across service sectors, with the exception of "Utilities", was at a 3 (out of 5) rating or below – indicating that significant attention is required. The most efficient service sector in high GNP countries was also "Utilities", while the lowest was "Public Transportation". In upper middle GNP countries the most efficient service sector was "Certification and Licensing" and lowest was "Public Works". With lower middle income countries, the most efficient service sector was also "Utilities" and the lowest was "Public Healthcare". Bureaucracy was the theme that stood out when respondents addressed efficiency in services. Hundreds of respondents from across the Arab World anecdotally highlighted the burdens of excessive paperwork, unnecessary government processes and duplication of efforts. As a result of inefficiency of service delivery, the majority of customers in Arab countries reported that receiving government services in their countries was not convenient and interfered with their daily lives.

Figure No. 18
Performing government transactions is convenient, doesn't require a long time or interfere with my day

	Lower middle income Countries	Upper middle income Countries	High income Countries
Strongly disagree	36.4%	35.7%	21.4%
Disagree	30.7%	28.3%	23.8%
Neither agree nor disagree	12.8%	13.8%	18.0%
Agree	12.2%	14.3%	24.4%
Strongly agree	7.9%	7.9%	12.3%

"Receiving government services takes a very long time and you keep getting transferred from one person to the other neither of whom can help you"

6 – Centralization of services in the capital and urban centers has limited the accessibility of rural populations to key services and sectors

For the most part, accessibility to services is limited and requires significant attention across the Arab world. In this respect, and while high GNP countries fared better than middle GNP countries - only one service sector received an above 3 out of 5 rating.

Within countries, access to services also differed between demographic groups, namely urban and rural populations and high income and low income earners. While the sample sizes of rural dwellers and low-income earners were not big enough to generalize from, given that data was collected online, there was a notable discrepancy between the rural poor and the urban poor's experiences with the quality, efficiency and accessibility of services and the experiences of the rural rich and the urban rich with the same. This is not surprising, as poverty in most developing countries, including

many Arab countries, is urbanizing quickly and is going to continue to do so[7]. At the same time, rural poverty remains acute, but is of a very different nature than poverty in cities and metropolises. Rural areas in particular continue to face problems with accessibility to infrastructure and services and while cities suffer from urban sprawl, they still benefit from a larger allocation of resources and greater access to goods and services. However, the growing gap between the urban rich and the urban poor means that not all customers have the same access to the same quality government services even in urban areas . For these reasons, it comes as no surprise that, in the smaller survey sample of rural dwellers and low income earners, discernable difference in levels of access to services were clear. Comments by respondents support these claims as many of them, even those living in high-income countries, observed that resources for service delivery were concentrated in the largest metropolises and that many areas of their country still lacked access to quality services and to infrastructure.

[7] Ferré, Céline, Francisco H.G. Ferreira, and Peter Lanjouw. "Is There a Metropolitan Bias? The Relationship between Poverty and City Size in a Selection of Developing Countries." The World Bank Economic Review 26.3 (2012): 351-82. Print.

[8] Ibid.

Average Accessibility across Service Sectors in the Arab Region
ranked by High Income Countries

"Government services may be good in the big metropolitan cities ... but if you are living in the villages and you get sick, you will die before you arrive at a hospital"

Highest Accessibility Ratings

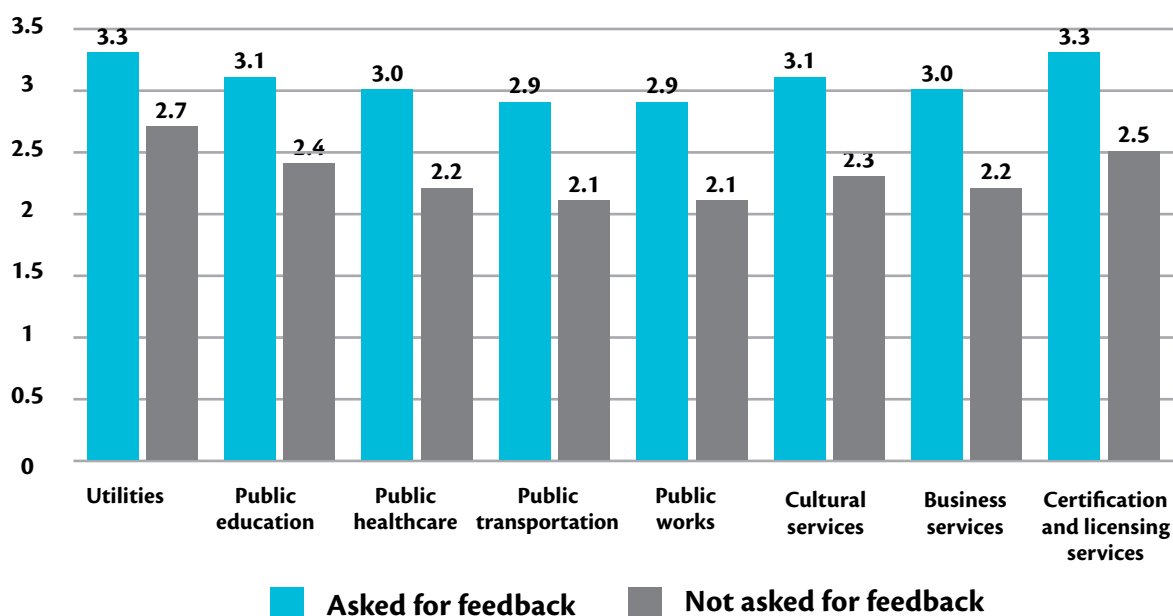High Income Countries: UAE

Upper middle income countries: Jordan

Lower middle income countries: Morocco

7 – Evaluating service performance is crucial to improving government services, and leads to an enhanced customer experience.

Across the region, customers who were asked for their feedback on public service delivery showed relatively higher rates of satisfaction with public services. On average, customers who were asked for feedback on services rated services an average of 1.0 points higher than their counterparts who did not. Nurturing a culture where customer feedback is incorporated in the public services evaluation process is not just key for improved and more innovative public services, but also key for ensuring customer satisfaction and sense of involvement across the Arab region.

Figure No. 20
The Impact of Soliciting Customer Feedback on Satisfaction with Government Services

Chart data:

Service	Asked for feedback	Not asked for feedback
Utilities	3.3	2.7
Public education	3.1	2.4
Public healthcare	3.0	2.2
Public transportation	2.9	2.1
Public works	2.9	2.1
Cultural services	3.1	2.3
Business services	3.0	2.2
Certification and licensing services	3.3	2.5

Asked for feedback   **Not asked for feedback**

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The Governance and Innovation Program

The Governance and Innovation Program at the MBRSG conducts research and programmatic activities focusing on policies for government innovation and development through information technologies in the Arab states. The objectives of the program are aligned with regional objectives towards nurturing a culture of innovation in society, promoting participatory, inclusive and transparent government models; and enabling more responsive and efficient governance through effective adoption of information technologies. The program works on three tracks:

- **Policy and Scholarly Research**: Conducting research focusing on government policies and societal transformation through technological innovation in the Arab region.

- **Policy Advisory**: The ultimate objective of the Program is to inform present and future Arab policy makers in assessing the impact of the ongoing transformations in their societies and governments; and to help develop locally fitting policies for future governance initiatives.

- **Regional Development Activities**: The Program brings together regional and international networks of practitioners and scholars working in related areas through programmatic and educational activities, in order to encourage proactive regional knowledge sharing and bridge the gap between policy and research.

The Mohammed Bin Rashid School of Government

The Mohammed Bin Rashid School of Government (MBRSG) is a research and teaching institution focusing on public policy in the Arab world. Established in 2005 under the patronage of HH Sheikh Mohammed Bin Rashid Al Maktoum, Vice President and Prime Minister of the United Arab Emirates and Ruler of Dubai, MBRSG aims to promote good governance through enhancing the region's capacity for effective public policy.

Toward this goal, the Mohammed Bin Rashid School of Government also collaborates with regional and global institutions in delivering its research and training programs. In addition, the School organizes policy forums and international conferences to facilitate the exchange of ideas and promote critical debate on public policy in the Arab world.

The School is committed to the creation of knowledge, the dissemination of best practice and the training of policy makers in the Arab world. To achieve this mission, the School is developing strong capabilities to support research and teaching programs, including

- Applied research in public policy and management;

- Master's degrees in public policy and public administration;

- Executive education for senior officials and executives; and,

- Knowledge forums for scholars and policy makers.

Annex I: Research Methodology: Citizens and Government Surveys

The ideal of the 'new public service' differs from traditional public service approaches in that it is citizen centered and focuses on enhancing the public good through inclusive service delivery and design. The focus on service efficiency, customer service and innovation is becoming an accepted norm in the Arab World, in order to provide better services. The citizen is increasingly being lauded as the customer whose feedback and satisfaction is core to the work of government. The new ideal of public service has migrated away from slow, bureaucratic, process focused services towards streamlined, quick and accessible ones[9]. More recently, these new approaches in public management also paved the way for a plethora of 'digital-era' governance methods in public service delivery, primarily utilizing information and communication technology innovations to deliver even more efficient, more inclusive and less costly services[10]. In recent years, these trends have been widely adopted in the Arab region with the growth of national electronic government, mobile government and smart government initiatives across the region.

This report takes this ideal into consideration and analyses customer satisfaction with government services based on four important pillars of good government service: citizen centricity, excellence in service quality, efficiency and accessibility of services. Our survey assessed these qualities by examining the individual characteristics that must exist in order for services to be deemed citizen centric, of high quality, efficient and accessible.

Quality

- Do government services meet the expectations of customers?
- Do customers find government services reliable?
- Are customers satisfied with government customer relations?
- Is government responsive to customer remarks, complaints and inquiries?

Accessibility

- Are all customers able to access government services?
- Are services are designed to meet the convenience needs of all customers?
- Do services integrate ICT to make them more accessible for customers?
- Are services designed in a way that is accessible to traditionally hard to reach populations such as rural populations, the poor, the disabled and the elderly?

Efficiency

- Do government services require a long time to be delivered?
- Are customers satisfied with the efficiency of government services?

Citizen Centricity

- Are citizen needs assessed for government service design?
- Do services enhance the customer experience and meet preferences and expectations across interactions and transactions?
- Do citizens have a choice of channels for service delivery?
- Is receiving government services convenient? And does receiving government services significantly interfere with the lives of customers?

[9] Denhardt, Janet Vinzant., and Robert B. Denhardt. The New Public Service: Serving, Not Steering. Armonk, NY: M.E. Sharpe, 2007. Print.

[10] Margetts, Helen, and Patrick Dunleavy. "The second wave of digital-era governance: a quasi-paradigm for government on the Web." Philosophical Transactions of the Royal Society A: Mathematical, Physical and Engineering Sciences 371.1987 (2013).

Methodology:

Two separate surveys, targeting two individual groups were administered as a part of this study. The first survey targeted residents of all 22 Arab countries ('the public') and was conducted between November and December 2013 among a sample of 21,158 adults living in all 22 Arab countries[11]. The survey was completed online and structured as a questionnaire. Sampling for this survey was done utilizing the "simple random sampling" technique.

The 'public' or citizen survey was distributed using several databases of residents of Arab countries, collected and compiled by the Governance and Innovation Program at The Mohammed bin Rashid School of Government , as well as through social media networks and 3rd party contact database. Responses from this survey were then filtered to include only responses from Arab countries. This technique was justified based on the survey requirement to measure the habits and opinions of the citizens and among the public in residents of Arab countries as well as government officials and employees.

The survey sample was predominantly male, with women making up only of 21% of the sample, and mainly comprised of people between the ages of 22 and 39, who made up 77% of the sample.

The second, 'government', survey targeted one official government entity in each of the Arab countries, and was distributed to and completed by official government representatives (to the best of their knowledge and expertise) to reflect the official positions and practices of government entities at large within that country. Respondents of this survey completed it online (or via other methods). Follow ups were conducted with all targeted entities in the form of phone calls, emails and fax correspondence.

All of the findings described in this report reflect information collected from the two surveys. Respondents to the public survey were given the option to complete the surveys in Arabic and English, while the government survey was only offered in Arabic.

Weighting – Citizens survey

For the public survey specifically, given the uneven distribution of the sample across certain demographics, weights were applied to the statistical results[12] according to the following weighting plan:

In analyzing survey results, the final sample was found to be representative across all key demographics, with the exception of

Gender:

- The percentage of female respondents at the regional survey level was 21%, as compared to the regional average of 50% in the Arab world[13].
- At a country level, the percentage of female responses fluctuated between 11% female responses in Yemen at the low end of the spectrum, and 30% female responses in the UAE at the high end of the spectrum.

Population:

- Certain countries were overrepresented or underrepresented in terms of their sample size as a percentage of the total survey sample size, as per the table below. The table below presents country populations in the Arab world as a percentage of the total population of the Arab region, in comparison to the country sample sizes within the survey as a percentage of the total survey sample size.

[11] 3 countries were excluded due to their small sample sizes, as detailed in in the weighting plan

[12] The charts linking ICT usage and engagement with government to service satisfaction were based on unweighted data.

[13] With the exception of the UAE where the gender ratio is skewed towards men, with women constituting 33% of the population. The greater percentage of men is largely due to the large expat labor force found in the UAE, which should not constitute a significant portion of the respondents for this specific survey, as it was solely conducted among the portion of the population with online access.

Country	Population	of total Arab population %
Algeria	36,983,902	**9.74%**
Bahrain	1,377,273	**0.36%**
Comoros	792,913	**0.21%**
Djibouti	940,090	0.25%
Egypt	85,378,440	22.49%
Iraq	34,776,200	9.16%
Jordan	6,572,903	1.73%
Kuwait	2,959,015	0.78%
Lebanon	4,324,060	1.14%
Libya	6,506,095	1.71%
Mauritania	3,704,414	0.98%
Morocco	32,925,550	8.67%
Oman	2,957,333	0.78%
Palestine	4,393,572	1.16%
Qatar	1,976,840	0.52%
Saudi Arabia	29,319,400	7.72%
Somalia	10,052,840	2.65%
Sudan	46,822,880	12.33%
Syria	21,468,960	5.66%
Tunisia	10,813,680	2.85%
UAE	8,207,940	2.16%
Yemen	26,358,020	6.94%

Arab country populations and sample sizes (as percentage of total population)

In such cases, weights can be used to increase the representativeness of a survey. However, certain limitations need to be taken into consideration regarding the appropriateness of applying said weights. For example, if the weights are too large or too small, they can decrease the stability of the survey and increase the margin of error when inferring responses as representative of the survey sample.

In light of this, and in order to determine the best approach to making the data both as representative and stable as possible, tests were run on the survey datasets to assess the effect of developing and applying weights for:

• Population (1-dimensional weight)
• Gender (1-dimensional weight)
• Gender x Population (2-dimensional weight)

Weighting across two dimensions (gender x population) resulted in the application of large weights, (in some cases up to 16), which would create instability and introduce substantial errors in the survey. Weights of up to 8 are generally acceptable and will not significantly skew results or increase error margins .

Weighting across one dimension (gender or population) resulted in smaller and more acceptable weights, and as such only one of these weights could be applied. Given that the survey findings will be analyzed at the regional level and the country (or country group) level, and responses will be inferred as representative of the relevant populations, weighting for population would increase the representativeness of the survey.

Given, however, that the survey findings will not be analyzed at the gender level, weighting for gender need not be applied. The gender ratio will be clearly indicated in the analysis of survey findings, which will be presented – if needed - as descriptive of men's and women's responses received in the survey, rather than representative.

Countries (in grey in the above table[17]) with very small sample sizes (<15) were selected for exclusion from the survey as whole, as they were not representative, and their small sample size would increase the error margins for the survey. Two

options were explored before taking the decision to exclude said countries.

The first entailed including them in the weighting, which would require the application of very large weights, consequently introducing instability.

The second option entailed 'trimming' the weights for these countries down to 1, thereby introducing a large 'unequal weighting effect' (of 6.4, as opposed to the acceptable 1-2 range), within the sample. The exclusion of these countries brought down the unequal weighting effect to an acceptable level of 2.01, making the sample more stable.

Conclusions:

• Based on the above analysis, only population weights were applied to the survey data.
• Additionally, the countries with small number of respondents in the survey (N<15) were excluded from overall regional analysis (these countries are: Comoros, Djibouti and Somalia). Hence, the sample size used in the analysis of the survey findings is: N=20,702.

Service Satisfaction Meter

The Arab Government Service Satisfaction Meter is a composite index designed to give a holistic view of the public's satisfaction with government services in the Arab world. It draws on internationally recognized development indicators such as the UN's E-Government Development Index (EGDI) in its formulation, and is calculated by averaging the ratings of the three dimensions of government service satisfaction: Accessibility, Efficiency and Quality. Each of these dimensions, or indicators, can also be calculated and evaluated independently[18] .
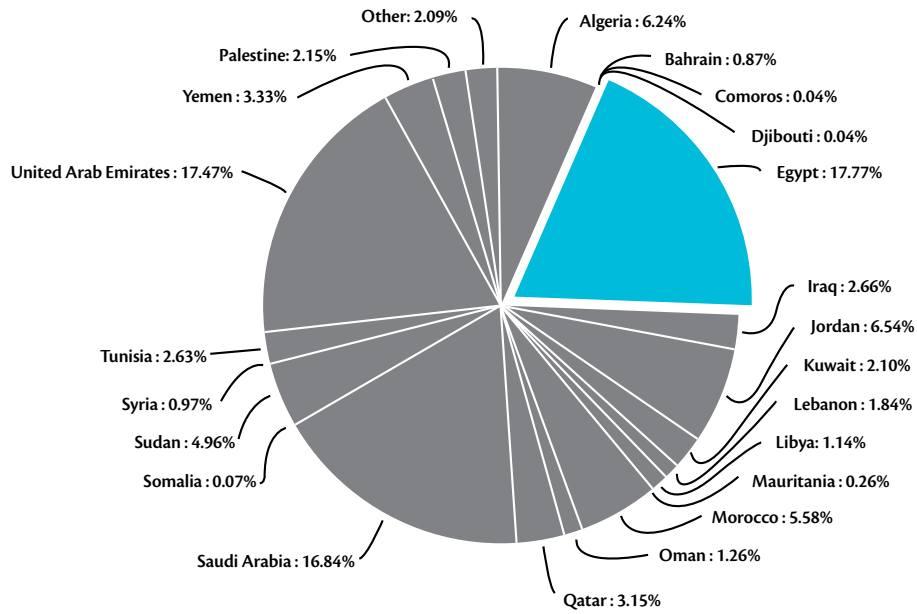
The formula is as follows:

The Arab Government Service Satisfaction Meter= (⅓ * Average Efficiency Rating) + (⅓ * Average Quality Rating) +(⅓ * Average Accessibility Rating)

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[17] Comoros, Djibouti, , Somalia

[18] The average ratings of Efficiency, Quality, and Accountability are each calculated as: $((w_1 \ast n_1)+(w_2 \ast n_2)+(w_3 \ast n_3)+(w_4 \ast n_4)+(w_5 \ast n_5))/(n_1+n_2+n_3+n_4+n_5)$

where $w(x)$ is the assigned rating (x=1-5), and $n(x)$ is the number of corresponding respondents who assigned that rating.
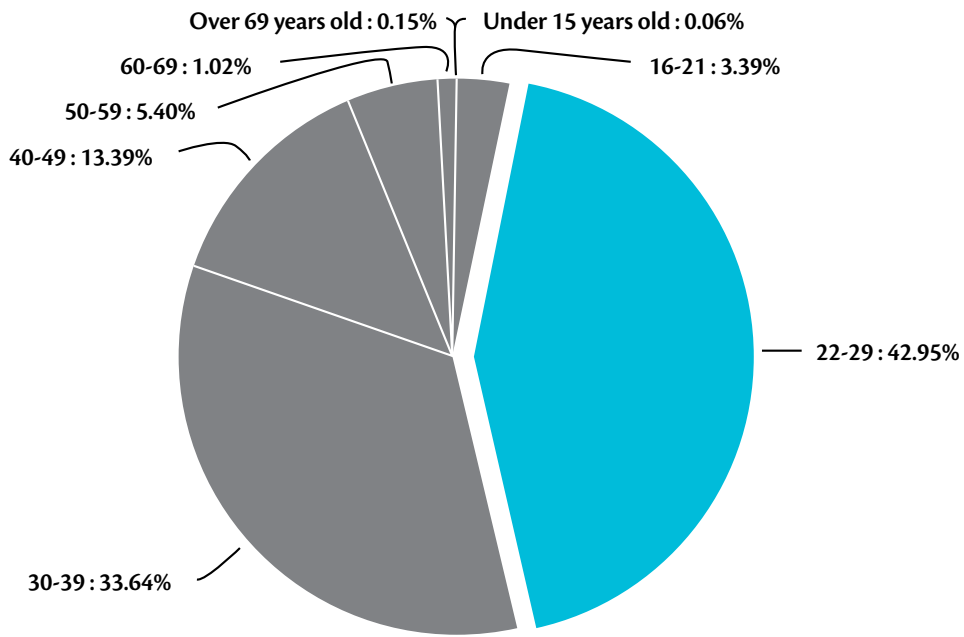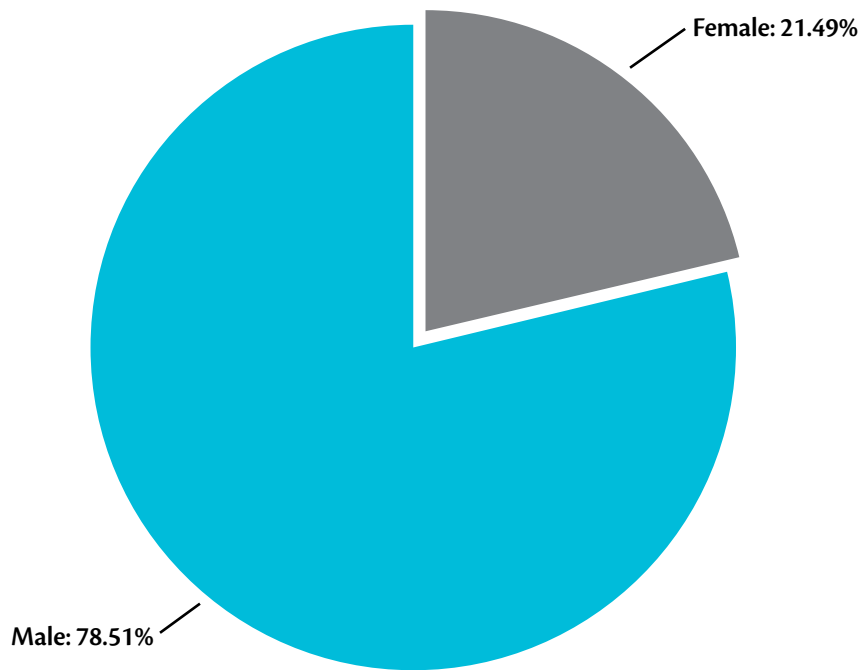
Annex II: Demographic Breakdowns

Other: 2.09%
Palestine: 2.15%
Yemen : 3.33%
United Arab Emirates : 17.47%
Tunisia : 2.63%
Syria : 0.97%
Sudan : 4.96%
Somalia : 0.07%
Saudi Arabia : 16.84%
Qatar : 3.15%
Oman : 1.26%
Morocco : 5.58%
Mauritania : 0.26%
Libya: 1.14%
Lebanon : 1.84%
Kuwait : 2.10%
Jordan : 6.54%
Iraq : 2.66%
Egypt : 17.77%
Djibouti : 0.04%
Comoros : 0.04%
Bahrain : 0.87%
Algeria : 6.24%

Country of residence

Remote area (population under 5.000), 3.0%
Rural area (town, village or small city with population under 50.000), 23.1%
Urban areas (cities or megacities with population over 100.000), 60.1%
Semi-urban areas (towns or small cities with population under 100.000), 13.8%

Area you live in

Over 69 years old : 0.15%   Under 15 years old : 0.06%
60-69 : 1.02%   16-21 : 3.39%
50-59 : 5.40%
40-49 : 13.39%
22-29 : 42.95%
30-39 : 33.64%

Age

Female: 21.49%

Male: 78.51%

Gender

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