

Delivering Public Service for the Future: Navigating the Shifts

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Foreword

The unsettled nature of the political, societal and economic climate continues to be a pervasive reality for governments around the world. But what also endures, despite this climate, is governments' underlying promise to their citizens to deliver what they expect and deserve: flourishing societies, safety and security, economic vitality—and to do it all as good and conscientious stewards of the public resources in their care. This is the vision for public service for the future.

Bringing together all of these pieces for citizens is a vision as yet unrealized, but one we at Accenture see resolute public service leaders aspiring to every day. In the face of

the challenges, despite the constraints, they are pushing forward, determined to make genuine headway through innovation—and with every tool they have at their disposal.

But it's a hard road to go alone. That is why Accenture is pleased to inaugurate our *Delivering Public Service for the Future* program—a series of research papers and perspectives on what public service for the future could mean, and what it will take to get there. Our goal is to inspire and support public service leaders: to take a fresh look at the problems they face, to highlight innovative solutions to emulate, to present paths to progress they may not have considered, and to show how all of the pieces can fit together.

In *Delivering Public Service for the Future: Navigating the Shifts*, we lay the groundwork. We describe four profound structural shifts and a corresponding framework of practical actions governments can undertake to deliver the public services outcomes citizens want at a cost that can be sustained. Future chapters will explore these shifts in more detail, as well as other important enabling pieces (for example, human capital).

We hope our ongoing program will become a trusted guide for public service leaders ready to take the next bold steps toward the future. This is only the beginning.



Stephen J. Rohleder

Steve Rohleder



Brian Moran

Brian Moran

Introduction

Amid a tumultuous global political and economic landscape, governments across the world know one thing for certain: seismic economic and demographic shifts are reshaping public services. Yet Accenture sees another thing as well: despite these external pressures, the future of public services is far from predetermined.

We believe that governments now have the opportunity to make significant shifts of their own. Caught in an unsustainable position between the desire to deliver better public services outcomes and the unaffordability—and often, the ineffectiveness—of doing so using today's ways of working, forward-looking government leaders will shift: shift their thinking about what really matters to deliver for citizens and businesses; shift their approaches for delivery; and, crucially, shift the balance between what they can accomplish in public services and the costs of doing so by increasing public service productivity. It's time to think radically, deploying a new generation of processes and tools to build the public services of the future and using those we already have in new and better ways.

However, this simple concept of shifting represents a quandary in practice, because of the radical nature of the change it implies. A positive future for public services will only come from public services turning old ideas and ways of working on their head—making structural shifts in how they shape and deliver outcomes, both through wholly new service models and in massive reductions to their cost bases.

Why Change and Why Now?

We believe the fundamental gaps between what governments want to achieve and what they can achieve with public services will galvanize government leaders to decisive action. To test our thinking, we undertook a far-reaching research program, surveying 5,000 citizens worldwide and tapping into the knowledge of respected experts in 10 countries, to try to quantify the impact if governments continue public service provision as is.

From an expenditure perspective, consider modeling by Accenture and Oxford Economics, which projects through 2025 the demand for public services and the economic ability to meet that demand for 10 countries. The results, shown in Figure 1, are startling.

Every country we examined is confronting shortfalls of billions of dollars over the next dozen years just to be able to deliver public services at current levels to future populations. In countries such as the United Kingdom and United States, new financial realities and aging populations will escalate demand. In countries like Brazil and India, burgeoning economies and rapidly rising citizen expectations will massively stretch government capacity. Despite the different challenges, however, all the countries share a similarly stark expenditure gap if they do not change how public services are delivered.

Moreover, covering these funding shortfalls would only maintain a level of services that citizens feel to be inadequate. Our survey points to a large gap between the expectations citizens have and how well they feel governments are delivering against those expectations. 2012 Ipsos MORI/Accenture polling shows that only

36 percent of citizens surveyed across 10 countries are fairly satisfied or very satisfied with public services, and only 37 percent feel fairly or very confident about government's ability to meet their future expectations. In other words, the delivery gap is actually larger than the funding shortfalls suggest because governments are currently not delivering to citizen expectations.

Interestingly, the same survey showed that citizens' number one priority for public services should be "better understanding the needs of citizens and communities." From Accenture's extensive citizen research, we have consistently heard citizens call for public services that promote a flourishing society, safety and security, and economic vitality. They want their governments to operate efficiently. And they put little stock in preserving legacy structures that no longer work to meet those ends.

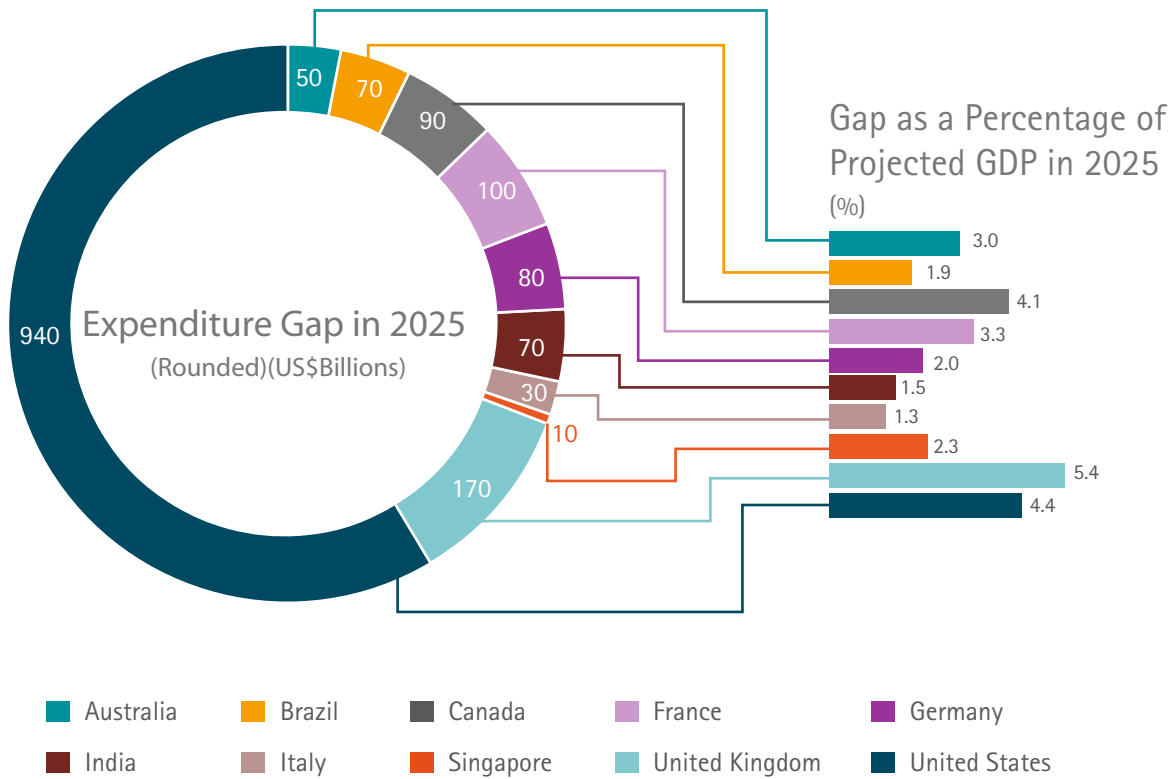


Figure 1. The gap in expenditure (expressed in US\$ billions) of delivering public services at existing levels in 2025. Source: Oxford Economics, 2012.

These realities, and the fact that public services simply cannot afford to deliver in legacy ways (even if citizens wanted them to), have led governments to an epiphany: that following the path of the past will lead them to an unproductive and unviable place, and consequently, the way to delivering impactful and sustainable public services lies in taking hold of and reshaping their own futures. By making decided shifts away from the well-worn paths, they can rejuvenate their efforts to deliver on a flourishing society, a secure nation and economic vitality.

While defining all the answers to the future of public service would be an impossible task, *Delivering Public Service for the Future: Navigating the Shifts* begins to lay the groundwork. Starting from our

understanding of what citizens want from their public services, we have identified four clear structural shifts¹ in public service design and delivery that will push public services toward becoming more outcome focused and begin closing the gaps in expenditures, expectations and public service performance:

- 1. The shift from standardized services to personalized services.**
- 2. The shift from reactive to insight driven.**
- 3. The shift from public management to public entrepreneurship.**
- 4. The shift from piecemeal efficiency to mission productivity.**

We emphasize the importance of undertaking these shifts in concert. While we recognize the many steps governments have taken to navigate through current crises and plan for the future, we emphasize that the path to a more sustainable future is through an integrated approach: to plan holistically against the framework and then act with rigor.

The perspectives we lay out here inaugurate Accenture's new *Delivering Public Service for the Future* initiative, a long-term program of thought leadership and research that will illuminate realistic paths forward for governments that are serious about the need to reform within a new reality.

¹ We note that human capital underlies all of the structural shifts we discuss in this paper. This component is so critical that we have chosen not to cover it as a topic here, but rather, to devote an upcoming installment of our *Delivering Public Service for the Future* initiative to it.

A woman with dark hair, wearing a purple top and a pearl necklace, is looking down at a tablet computer. The tablet is held by a hand in the foreground. The background is blurred with colorful bokeh lights in shades of red, orange, and blue. The text is overlaid on the tablet screen.

The Structural Shift: From Standardized Services to Personalized Services

The shift to personalized services implies designing services in partnership with citizens—and delivering them in integrated ways to provide exactly what's needed, when needed, in the most appropriate manner.

As citizens change—in their expectations, mobility, technological abilities, and longer and more complex lives—effective governments will make changes in how they shape and deliver public services. They will undergo a shift from standardized to personalized services—tailoring public services around the needs of citizens to drive better outcomes at sustainable costs.

Figure 2 illustrates the pressing need for such a shift. It shows how costs for public services core to fostering a flourishing society—education, health and social services—have risen at a dizzying rate across most Organization for Economic Cooperation and Development (OECD) member states. Meanwhile, many of the key public services outcomes in these service areas have remained relatively static, or even declined. Why? Largely because current models of top-down, blanket public service delivery no longer fit modern realities.

As Domenico Casalino, CEO of CONSIP (a public stock company owned by Italy's Ministry of the Economy and Finance), explains, "The world is moving forward very rapidly, and just as production processes change and public sentiment changes, likewise the service processes of the public administration must also change."

But what is the path forward? In our research, we have seen glimpses of a future of personalization, with innovative agencies integrating across services to answer the specific needs of the citizen, irrespective of

government structures. In manufacturing, the concept of "a lot size of one" implies the flexibility to respond to "on demand" needs, without considerable rework and mistakes. It allows businesses to increasingly target to individuals (not just groups) and allows them to design and build their own products specific to their needs. This concept encapsulates the idea of personalization that Accenture asserts must take place in public services.

For governments, enabling such a capability without dramatically increasing costs will come from shifts in technology, process, culture, leadership and accountability that move public services toward a more integrated, holistic service platform for citizens while increasing the ability for caseworkers, teachers, healthcare providers and others to work in collaboration. The result will be more productive public services that get closer to citizens, deliver better results through more targeted (and less wasted) efforts, and improve relationships with citizens as they improve citizens' lives.

At the heart of the shift to personalized solutions will be the citizens themselves, engaged in the design and delivery of the services they receive. As Dr. Nirmaljit Singh Kalsi, Joint Secretary of India's Ministry of Home Affairs, explains, "The challenge for governments today is a service delivery model that incorporates citizens' expectation in its design and makes the citizen a stakeholder in the implementation."

The Benefits

First and foremost, personalization is about better serving the citizen—improving public services outcomes by providing citizens with what they need, when they need it, in a way that is easily accessible to them. For example, in Italy the Istituto Nazionale della Previdenza Sociale (INPS), the main Italian welfare administration, has logically organized its services around the citizen, and users of the service now have to submit only one request, regardless of the agencies that must be involved to fulfill it: INPS and local authorities collaborate to satisfy the citizen's needs.

Accenture experience has shown that fiscal benefits will follow such approaches (if done right) by reducing the cost to deliver through a better targeted and more preventive approach. A proactive, focused approach reduces the need for more intense interventions down the line and provides citizens with choices—including the ability to more quickly (and cost-effectively) self-serve for the majority of government-citizen interactions. In other words, moving from standardized to personalized services can dramatically shift the balance of public services outcomes to cost.

Moreover, citizens across the globe are eager for this shift to personalization. In our survey, 63 percent of respondents agreed with the statement: "I often find it difficult to find my way through the system to access the services I need."

"The world is moving forward very rapidly, and just as production processes change and public sentiment changes, likewise the service processes of the public administration must also change."

- Domenico Casalino, CEO of CONSIP

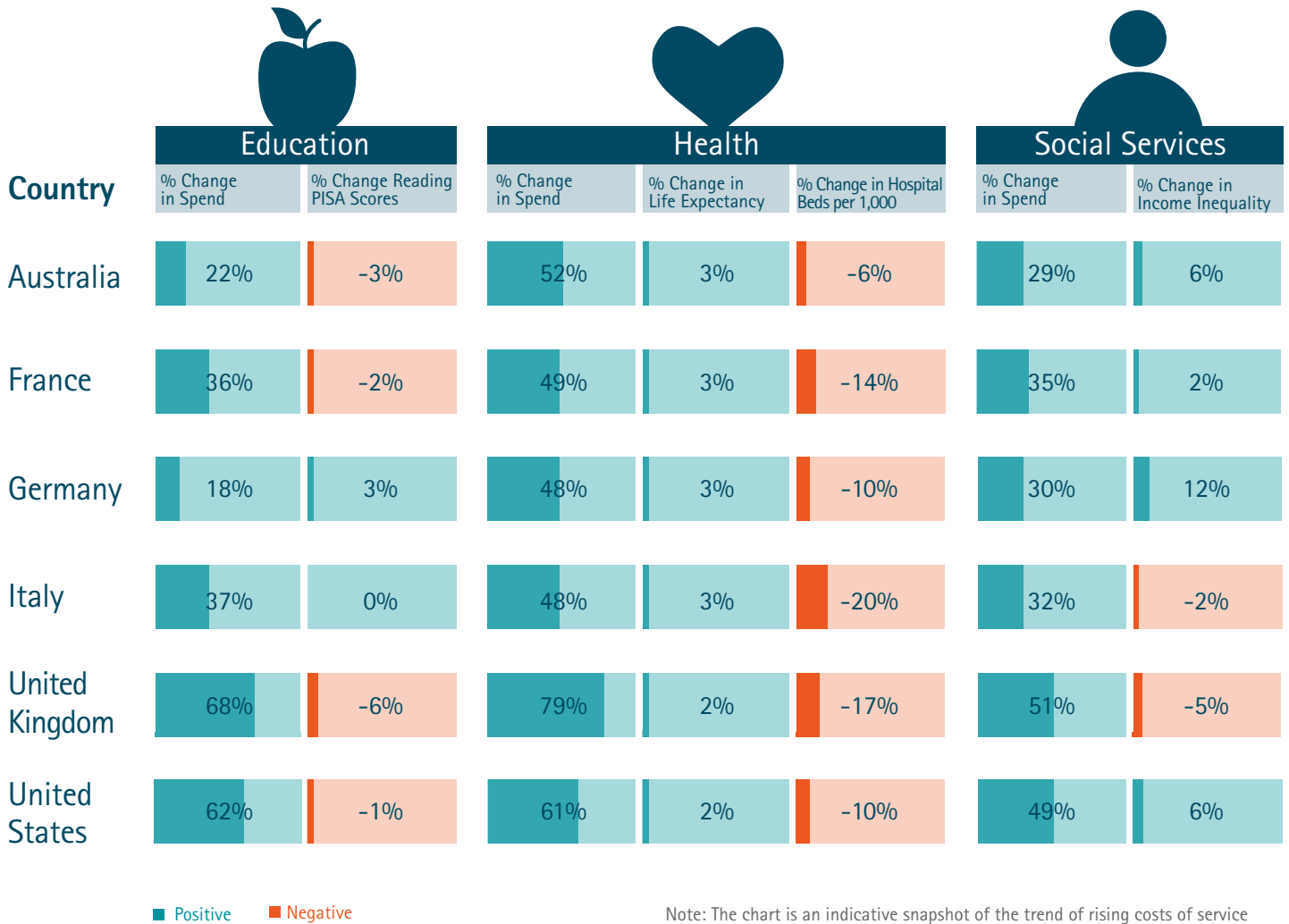


Figure 2. Costs vs. Outcomes in Education, Health and Social Services (2000-2008).
 Source: OECD data and Accenture analysis.²

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² OECD Sources: http://www.pisa.oecd.org/document/61/0,3746,en_32252351_32235731_46567613_1_1_1_1,00.html;
http://www.oecd.org/document/24/0,3746,en_2649_33933_2671576_1_1_1_1,00.html#data;
http://www.oecd.org/document/60/0,3746,en_2649_33929_2085200_1_1_1_1,00.html

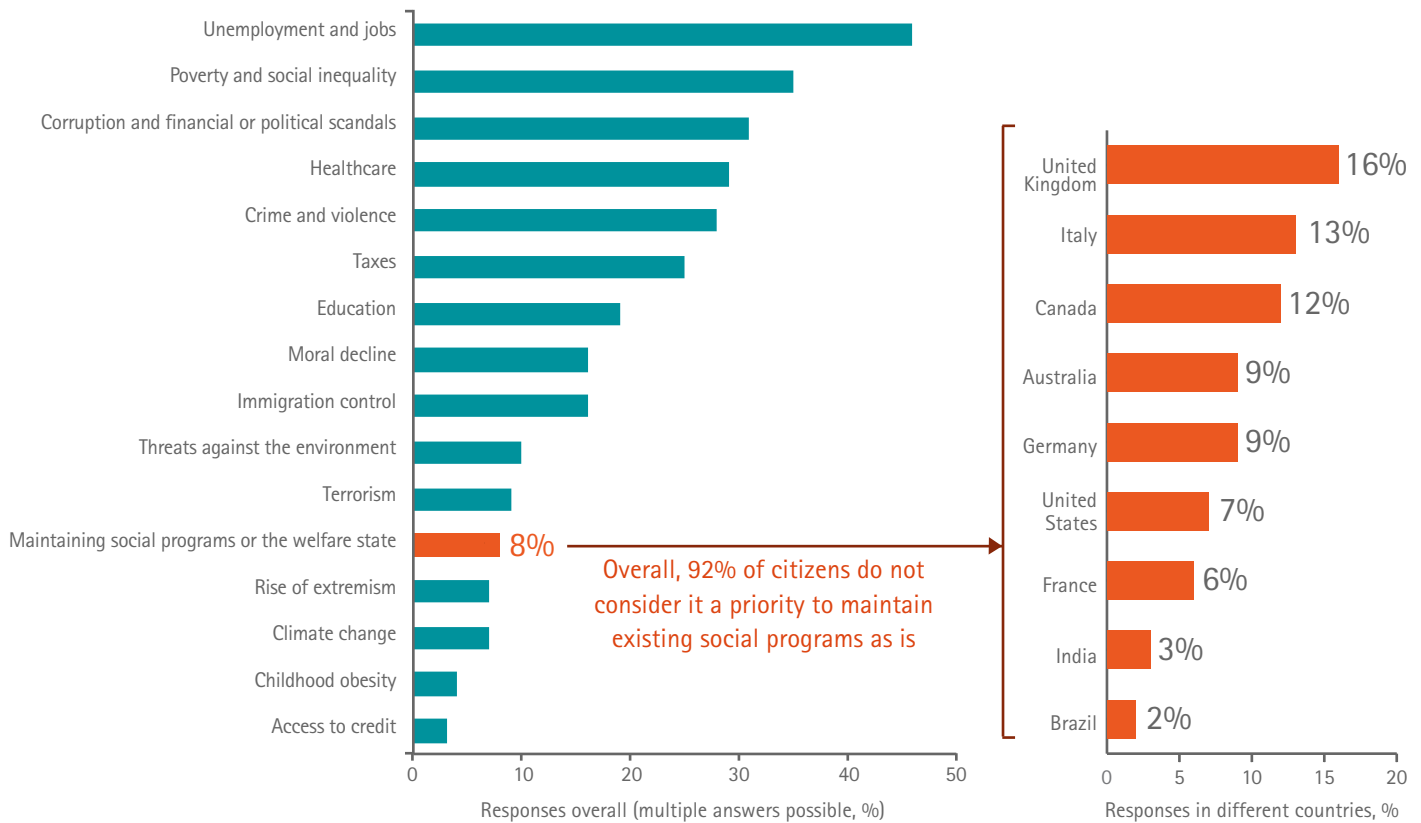


Figure 3. Citizens' priorities for government. Source: Ipsos MORI, 2012.

Citizens also responded that two of the top three priorities for governments should be "to better understand the needs of citizens and communities" and to "make sure that services are tailored to the needs of people who are using them."

Interestingly, Figure 3 shows that 92 percent of the citizens we surveyed do not consider maintaining existing social programs *per se* as one of their top concerns. Rather, they appear to care more about focusing on the public services outcomes from these programs: reducing unemployment, poverty and social inequality. In other words, it's about the "what," not the "how."

How Do We Get There?

Getting to genuine personalization is about understanding, designing and delivering around citizens.

Understanding citizens by developing deep insight

Deep citizen insight forms the roots of personalization. As governments take a more systematic approach to how they aggregate, analyze and share data, the design of their citizen services can be better informed by the insights they gain. "Greater attention must be given to what increasingly

detailed and centralized data sets are telling government," explained one public manager in our interviews.

The insights enabled by data analytics give clarity into the differentiated needs of citizens and communities, and a starting point for developing much more finely segmented service platforms to meet a much broader range of personal needs at a much more sustainable cost. Armed with this insight, public managers can refine policies, target resources more effectively, and make confident, proactive moves to improve public services outcomes. Decision-support tools can help deliver this insight to the fingertips

The design of personalized public services puts the citizen in the center and radiates out from there, rather than starting from the historic structures or functions of public services.

of government employees who are serving citizens directly. Systematic (and effective) analysis of performance helps to understand policy effectiveness and refine approaches. And a virtuous circle is created.

Compared to the private sector, the public sector has proceeded with relative caution in applying sophisticated analytics to improve service, due to data privacy requirements and lack of interoperability, common standards and useful metrics. Nevertheless, we have some examples of how rich data is already driving insights and action in public services.

For example, New York City has a vision of using decision-support technologies to help caseworkers make optimal choices based on the specific circumstances of the individual/family. The city's HHS-Connect program uses master data management to create a 360-degree view of a citizen served by the city that caseworkers across agencies can use to collaborate in creating a tailored service. Also from New York, the city's 311 service not only resolves non-emergency issues, but also analyzes data from its 60,000 non-emergency calls a day to make proactive decisions. In one instance, the system helped police target illegal social clubs after 311 showed a connection between certain locations and public drinking complaints. The city's mayor has described 311's effect this way: "It's not just a citizen service hotline, it is the most powerful management tool ever developed for New York City government. I can't imagine running the city without it."

In the Netherlands, the award-winning service "burgerlink" (Citizenlink) is harvesting citizen insight, using e-participation technologies to encourage citizens to

provide feedback on their involvement in and satisfaction with public services, and analyzing this data to continuously improve services.³ To realize the vision of public service for the future, the examples set by these pockets of excellence in personalization will need to be replicated much more broadly.

Designing around the citizen

Insight develops the deep evidence base that should shift the starting point for public service design. The design of personalized public services puts the citizen in the center and radiates out from there, rather than starting from the historic structures or functions of public services. Designing around the citizen also implies a much more context-specific approach, enabled by the likes of local design and commissioning.

Accenture is already seeing some noteworthy models. For example, New Zealand's long-running "Strengthening Families" program provides a structured approach across multiple central government agencies to deliver the right menu of support services to families with multiple needs. The program emphasizes early intervention, with government agencies and community organizations working together to improve health, education and social outcomes for families through a process of collaborative case management.

Integrating structures and building delivery networks

Designing around citizens also implies a much greater level of integration. To date, too many initiatives in this space have effectively been "bolt-ons," ways of bypassing entrenched departmental and jurisdictional structures.

In the future, fragmented structures should be networked and aligned so public services can work in a consolidated way around the holistic needs of citizens.

Moreover, government as a hierarchical, process-driven provider of standardized services will make way for public service delivery networks, involving multiple organizations, often from the public, private and third sector, in the pursuit of a policy outcome identified in partnership with citizens. As networks advance, they will bring shifts in culture, skills, technology and even core function at an individual agency level.

"The role of government is shifting: from managing public organizations, to presiding over complex networks that solve problems," says Mark Moore, Hauser Professor of Nonprofit Organizations at Harvard University. "This means shifting from a 'do your job' way of working to a problem—and solution—based way of working."

Engaging citizens as partners in service design

Finally, personalization entails putting more power over how they are served into the hands of the people being served. For example, according to the 2012 UNPAN eGovernment survey, 61 countries—almost one-third of all countries globally—already have e-participation policies online.⁴ This is a great start to involving citizens even more.

Certainly, enabling citizen participation in viable and cost-effective ways implies the need for a very strong set of digital services (such as the e-participation services mentioned above). Moreover, citizens expect such digital services.⁵

3 <http://www.iccs-isac.org/en/pubs/FinalReport-June7-2010-FrontSection.pdf>

4 <http://unpan1.un.org/intradoc/groups/public/documents/un-dpadm/unpan048581.pdf>

5 Accenture's 2012 Digital Citizen research examines trends shaping people's understanding and experience of digital government now and into the future. For more information, see <http://www.accenture.com/us-en/Pages/insight-digital-citizen-pulse-survey-summary.aspx>

Figure 4 illustrates the demand for greater digitalization across 10 countries, with well over half the respondents in our online Ipsos MORI survey expressing it is important for government to provide more services through digital channels. In Singapore, the number approaches 100 percent.

We have seen governments responding. India, for example, has introduced the Electronic Delivery of Services Bill, which provides that within five years of enactment of the bill, the center, the states and all public authorities under them will deliver all public services electronically, with few exceptions. Similarly, the United Kingdom is exploring the concept of "digital by default," where digital elements are designed into major programs (as opposed to being retrofitted onto them) to optimize service delivery on the Internet, and various support structures put in place to assist people who need help making use of the digital services.

However, the shift from standardization to personalization is about more than offering a range of channels for service delivery. The public services of the future will increasingly involve citizens in the design of their own public services—engaging them through online platforms (both to educate and, reciprocally, to gain citizen input on how to design services that will benefit them most) and then expanding their options—through choice of provider, for example, or through personalized budgeting and commissioning. At the same time, they also will begin to treat them as genuine partners, developing mechanisms to ensure that citizens have increased responsibility not only for the design and delivery of service "as they like it," but also for their own behavior change.

For example, in an effort to address the growing demand for health and social care, Fredericia Kommune, a local authority in Denmark, set about developing solutions

that enable older citizens to do more for themselves. The initiative emphasizes health education and enablement through a range of smart, home-based technologies, and is already generating significant savings as the demand for formal care reduces. Approximately 43 percent of users of rehabilitation services today end their treatment being completely self-sufficient, compared to only 5 percent three years ago. This has generated significant savings of approximately US\$2.7 million (15 million kroner), or 14 percent of the total budget.

Shifting Gears

In the next section, we explore how public services will shift from being reactive to being insight driven. They will use new technologies and new models of collaboration to problem-solve proactively, saving costs and improving the results achieved.

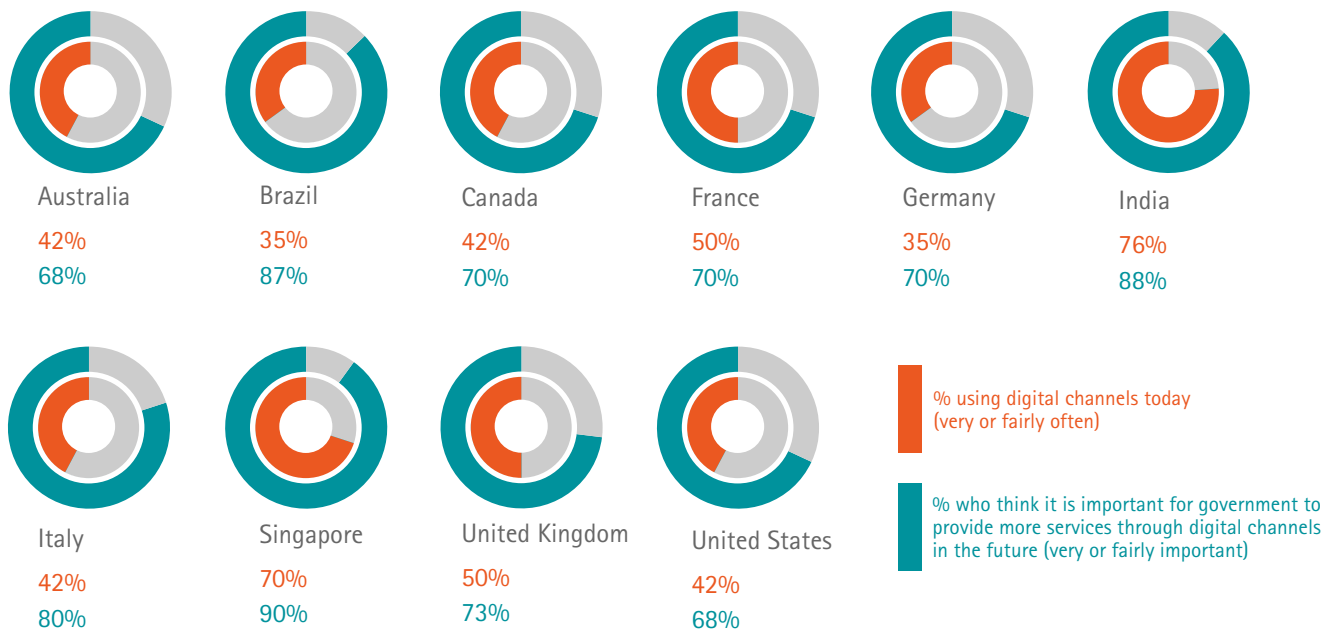


Figure 4. Citizens' experience and expectations with digital channels.

Source: Ipsos MORI, 2012.

The Structural Shift: From Reactive to Insight Driven

The shift to insight driven implies using new technologies and new models of collaboration to problem-solve proactively, reducing wasted effort and costs and improving the results achieved.



Accenture foresees a major shift from public services that react in a perpetual “catch-up” mode to public services that use deep insight to problem-solve proactively. Becoming insight driven will enable public services to both predict where needs, demands or threats will arise and then target resources to meet the needs more effectively and at a lower cost. In other words, the shift to an insight-driven approach addresses public service productivity from both sides—reducing costs by allowing public services to limit wasted efforts and improving the outcomes themselves.

The shift to insight driven will be critical to enabling public services to address an environment that is being re-shaped by major global, social and technological changes. A faster, more fluid world means security is no longer confined to national borders. Citizens are becoming ever more demanding, creating sometimes conflicting requirements. New technologies are both creating significant challenges and growing opportunities. For example, the rise of global cybercrime costs an estimated US\$388 billion annually, surpassing the annual cost of illicit drug flows (US\$288 billion).⁶ But rapidly advancing technology also provides a response, with leading defense and security organizations

increasingly using advanced analytics, mobility and identity technologies to generate the insights required to address these threats.

Moreover, there's a convergence of capability and need: “Future public services will be much hungrier about information at all levels, from activities and inputs through to outputs and outcomes,” explains Mark Moore.

The Benefits

No matter the mission, insight-driven public services will move nimbly to adapt to what they can extrapolate, not to just what they already know. For example, for high-performance defense and public safety organizations, the rapid increase in information means the ability to effectively identify, assess and understand threats will become the critical capability for the future. The insight-driven organization will use the insight it develops from information to proactively respond to evolving, more complex and less predictable threats. For example, in

the United States, the Memphis, Tennessee, police used better insight into crime hot spots to improve the efficiency and effectiveness of its policing. After implementing this insight-driven approach, serious crime in Memphis fell by more than 30 percent between 2006 and 2010, including a 15 percent reduction in violent crimes.

Becoming insight driven will be core to driving improvement across all other areas of public service as well. Better insight will be at the heart of delivering public service for the future, whether through enabling earlier interventions in health and human services (for example, to improve child welfare and education); smart approaches to mitigating the environmental impact connected with expanding populations; or highlighting cost savings possible through streamlined operations or cross-agency collaboration. As public services shift from reactive to proactive approaches, insight will be at the heart of what's possible.

⁶ Norton Cybercrime Report 2011. The U.S. Department of Homeland Security has also reported on rocketing levels of cybercrime: Between October 2011 and February 2012, there were 86 reported attacks on computer systems in the United States that control critical infrastructure, factories and databases, compared with 11 over the same period a year previously.

“Future public services will be much hungrier about information at all levels, from activities and inputs through to outputs and outcomes.”

- Mark Moore, Hauser Professor of Nonprofit Organizations, Harvard University

Complex service needs and rising costs continue to drive more cooperation and collaboration across public service boundaries. Increased collaboration and cooperation will rely on strategic information-sharing programs, both across government agencies and internationally, with a single, biometrically linked customer view at the center.

How Do We Get There?

Public leaders should begin the shift to becoming insight driven by focusing on the three priorities we describe in this section.

Adopting emergent identity services

While once used primarily for immigration, customs and border protection, and homeland security, emergent identity now has many other implications. Today's wealth of complex and ever-increasing data forces public services to think differently about how they make decisions about individuals to enhance the security of transactions, facilitate the movement of people and goods, distribute benefits, and reduce fraud, all while protecting privacy.

Emergent identity starts from the premise that ID is not a static characteristic, but rather, a constantly evolving one. When necessary, public services will need the ability to aggregate relevant data from a system of systems over time to gain greater confidence that first, an individual is who he or she claims to be, and second, the public service is providing the individual the right benefit, service or privilege.

For public services leaders starting on this journey, emergent identity will include a consistent national identity infrastructure, augmented with advances in biometric and biographic identity assurance. For example, in early 2012 Amsterdam Airport Schiphol began trials of a new automated border control system that involves using electronic gates equipped with facial recognition to compare passengers' identities with the digital photographs in their passports. The system can also identify forged passports and persons who may be on an authority's "wanted" list.

Collaborating and cooperating

Complex service needs and rising costs continue to drive more cooperation and collaboration across public service boundaries. Increased collaboration and cooperation will rely on strategic information-sharing programs, both across government agencies and internationally, with a single, biometrically linked customer view at the center. These programs should support a shift

in information sharing: from entities reaching out to one another on an ad hoc basis and waiting for a response to mutually shared, continually refreshed and readily available pools of information there when any partner to the collaboration needs it.

For example, Europol, the European law enforcement agency, has established centralized capabilities for data-matching. These capabilities enable Europol to identify the nature of criminal activity affecting multiple countries. Its secure information exchange network, Sienna, created in 2010, is one of a small handful of secure international police systems, and connects all major police forces in Europe on the same platform.

Using insight in the moment

The proactive approaches that insight enables will be enhanced by the use of mobility—getting the right information to the decision maker (whether police officer, soldier, caseworker, border agent or citizen) when and where needed. For police and defense forces in particular, mobile devices, coupled with efficient information-sharing solutions, enable self-synchronization: to organize and synchronize complex warfare activities from the bottom up, without needing as much input from higher-up individuals. When officers and troops are aware of "the situation," they are better able to organize to counter threats, quickly. Similarly, forces with mobility-enabled insight and agility have greater ability to react to—and predict—changes in the challenging operational landscape.

Shifting Gears

In the next section, we explore the shift to public entrepreneurship. By collaborating across and outside public service boundaries to engender a multiplier effect and leveraging the machinery and resources of government to stimulate economic outcomes, public entrepreneurs use everything at their disposal to capitalize on a wave of new economic growth opportunities.



The Structural Shift: From Public Managers to Public Entrepreneurs

The shift to public entrepreneurship implies using the machinery of government to stimulate economic outcomes and collaborating in new ways across and outside public service boundaries to multiply the impact of governments' investments.

As the world deals with the worst economic crisis since the Great Depression, finding a way to sustainable job creation and long-term growth jumps to the fore. Policymakers may choose from among many different routes, but the common denominator is recognizing that economic recovery begins with a dynamic private sector that generates new businesses while growing existing ones. By putting in place an environment that enhances the conditions for entrepreneurship, economies can harness future waves of growth in the global economy [see sidebar, *New waves of growth: sizing the potential*].⁷

Policy clearly plays a role, as do new strategies for education and workforce development. But there's another piece as well. With general government expenditures across OECD countries comprising nearly 50 percent of total GDP,⁸ government is in itself an engine of potential economic growth too large and powerful to ignore. Yet driving this engine will require a dramatic shift for public sector employees: from public managers to public entrepreneurs.

What is a public entrepreneur? We recognize many of the characteristics from business. Entrepreneurs use all the levers they have at their disposal to create value: forging new relationships, collaborating across traditional boundaries and breaking through silos to get things done. They identify where others are better placed to deliver value and harness that potential accordingly. They take and support calculated risks, recognizing that while some of their efforts may fail, others will not.

Public entrepreneurs approach their work with a totally different mindset from public managers. Rather than just operating as they always have, they act as intelligent "stewards" of the economic resources in their care, constantly seeking ways to make government—the way it operates and how it spends—stimulate economic outcomes wherever possible.

They spot the wider trends in the global economy as well as local opportunities for growth, and then connect the dots between (often disconnected) stakeholders to achieve more effective public services outcomes. And they understand that by collaborating with the private and social sectors in areas critical to growth, such as infrastructure or human capital, they can create a "multiplier effect" for the impact of their interventions.

How Do We Get There?

Beyond policy and legislation, public entrepreneurship will necessitate collaboration across and outside public service boundaries to engender a multiplier effect for government investments. It will also require intelligent stewardship—persistently operating the levers of government to stimulate economic vitality while allocating public finances wisely. The prospect of economic growth will be the motivation to getting the right stakeholders aligned in support with entrepreneurial thinking.

Collaboration to create a multiplier effect

Increasing diversity of new models of public service

Public entrepreneurs can help stimulate a number of economic benefits through a wider embrace of new models of delivery, such as social enterprises, employee-owned mutuals and cooperatives. Evidence suggests that these organizations are not only more effective and efficient at delivering public services, but they are also able to generate a number of wider economic benefits in the economy. For example, in the United Kingdom, one healthcare center that has been run as a mutual since 2008 reported productivity gains of 20 percent in 2009, with the quality of clinical outcomes improved or sustained as well. Replicated more broadly, such islands of excellence have the potential to generate significant benefits to the economy as a whole.

Developing joint growth-sector initiatives

In an increasingly competitive business environment, public entrepreneurs can help unlock advantage by collaborating to promote their private sector industries abroad. In fact, a number of economies, but particularly those in southeast Asia (for example, Malaysia and Singapore), are already deploying such strategies to significant effect. By developing a more strategic approach to the way national industries are marketed overseas and connecting business leaders with policymakers in a joint effort to promote inward trade and investment, they can ensure that businesses have the best possible chance to succeed on the world stage.

⁷ Accenture research points conclusively to the existence of numerous opportunities for accelerated economic growth and job creation in both developed and emerging economies over the next decade. For more information on the opportunities identified, see <http://www.accenture.com/us-en/pages/insight-new-waves-growth-unlocking-opportunity-multi-polar-world.aspx>

⁸ <http://www.oecd.org/gov/47887615.pdf>

New waves of growth: sizing the potential

Accenture analysis has identified four key areas for future global economic growth, given the support of the right type and mix of skills, infrastructure, networks and innovation systems. Public entrepreneurs will need to understand how their programs can help businesses and the economy more broadly tap into these trends:

The “silver” and health economy

As life expectancy increases, the graying of the population represents a major untapped growth opportunity.

The resource economy

The need for energy security and new ways to exploit green energy sources will only grow, as will pressures for efficient land and water use.

A multitechnology future

Cloud computing, analytics, mobility and other new technologies that offer vast new service opportunities are coming into their own.

The emerging–markets surge

As economic activity increasingly shifts toward the powerhouse economies of Asia and Latin America, trade and investment opportunities for multinational businesses will dramatically expand.

Governments that help their economies successfully ride these new waves of growth stand to benefit immensely. For example, our detailed macroeconomic modeling finds that by capitalizing on these opportunities:

- The US economy could generate an extra US\$1.6 trillion of GDP by 2020 and 8.7 million additional jobs, over and above current trajectories.
- Across Europe an extra US\$1.5 trillion (€1.2 trillion) and as many as 15 million jobs could be created and sustained.
- The Indian economy could generate an extra US\$198 billion (Rs 11 trillion) of GDP by 2020 and 37.5 million additional jobs.

Partnering with other sectors to create the ecosystem for growth

Public entrepreneurs are increasingly working in public, private and third-sector collaborations to harness technologies in ways that drive both economic and social outcome improvements. For example, Amsterdam's ground-breaking Intelligent City program created a new public-private consortia to finance the roll-out of smart technologies across the city, such as low-emission and electric vehicles, and smart meters and other energy-saving technologies. Beside generating inward investment, boosting tourism, promoting a healthier environment and providing the conditions for creativity and enterprise, it is also estimated that the Intelligent City initiative will generate an additional 800 new jobs in the city.

A second leading example of an Intelligent City is the major redevelopment taking place in Guadalajara, Mexico. All three levels of government are sponsoring Guadalajara's regeneration project, with significant private sector involvement. It will recast the city center as an economic cluster for the digital creative industry and create a new paradigm for sustainable urban development in Latin America. The goal is to enhance quality of life while providing employment to a projected 30,000 people.

Developing the labor and skills markets for the future economy

In a more complex and rapidly changing global economy, it is increasingly critical that the future workforces are equipped with the skills and education necessary for the jobs of the future. Public entrepreneurs can help create an environment for businesses to flourish, but if a nation's citizens lack the skills to compete with the best talent the world over, that nation will necessarily struggle. "We need to equip people with the right skills for the jobs on the market today and in the future," explains László Andor, European Commissioner for Employment, Social Affairs and Inclusion.

Forecasting demand and then effectively connecting labor supply to that demand can help maximize employment opportunities, and advanced analytics and collaborative technologies can facilitate this process. For example, the German Federal Ministry for Labor and Social Affairs developed a Virtual Labor Market (VLM) platform to enable successful reintegration of jobseekers into the labor market. The platform builds on three elements: (1) an online job portal; (2) an internal system supporting employment service and vocational counseling; and (3) an online "job-crawler" that collects job vacancies from companies' websites. Through the VLM, jobseekers can manage their applications and tailor them according to employers' demands; companies in turn receive assistance and a wide number of tools in managing their job postings, on top of being able to access a large pool of candidates. For both groups, a specific matching technology presents results weighted over 40 criteria that go beyond the headline job-title and allow a better matching of candidates.

Given the complexity of skills development, coordination among the public, private and social sectors is critical. However, a recent Accenture survey of European decision makers⁹ found that while organizations from the private, public and social sectors believe that collaboration is essential to better skills development, less than one fifth are collaborating on skills issues with other parts of the economy.

Public entrepreneurs will address this shortcoming by building coalitions and partnerships between businesses, public agencies and civil society organizations in order to better shape the skills of the future. For example, a broad collaboration between the City of New York, industry leaders and higher education has come together to boost the city's technology sector. At its center will be Cornell University's NYC tech campus and the Technion-Cornell Innovation Institute, dedicated to technology research and innovation.

Public entrepreneurs can help create an environment for businesses to flourish, but if a nation's citizens lack the skills to compete with the best talent the world over, that nation will necessarily struggle.

⁹ Accenture, *Outlook Point of View*. "Solving Europe's Human Capital Challenge." Tim Cooper, Mark Purdy and Matthew Robinson, June 2012. See <http://www.accenture.com/SiteCollectionDocuments/PDF/Accenture-Outlook-Solving-Europes-human-capital-challenge.pdf>

Government data or public sector information is the single largest source of information globally, and it represents a relatively untapped reservoir for new business innovations.

As well as generating highly paid technology jobs, the new technology sector should create ancillary opportunities. The city's community colleges are gearing up to ensure that there is local talent to fill these roles.

Intelligent stewardship

Driving innovation through public procurement

Accenture High Performance Business research has demonstrated the connection between procurement excellence and the attainment of high performance.¹⁰ Governments are major consumers. Across the OECD, public procurement budgets make up approximately 12 percent of total GDP.¹¹ As Mark Bennet of the Dublin City Council in Ireland states, "Government holds major procurement budgets. We are missing a trick if we don't use this lever to catalyze innovation."

Forward-thinking governments are doing just that—turning expenditure into innovation. In Dublin, the Dún Laoghaire/Rathdown Council invited organizations to tender for low-energy street lighting—but

stipulated that it would favor a consortia of academics and businesses, in an effort to stimulate innovative proposals. The contract winners provided a new form of streetlight, which reduced running costs and associated carbon footprint by 33 percent. If used across Ireland, this would generate savings of \$US18 million on streetlight operating costs alone. Moreover, by flexing its procurement muscle, Dún Laoghaire/Rathdown has improved environmental sustainability and helped stimulate new markets as well. As public entrepreneurs develop new models of commissioning and procurement, they will need to place innovation at the heart of their requirements.

Opening up government data

Government data or public sector information is the single largest source of information globally, and it represents a relatively untapped reservoir for new business innovations. By unlocking public data, public services can spark new digital value chains that lead to innovative applications and information products.¹²

Of course, making this information source more readily available has become increasingly important for governments wanting to be perceived as transparent. Yet governments are increasingly driving economic benefits as well by enabling businesses to harness this data to develop innovative new services.

For example, through "data mashing," published information can be re-used and merged with different types of data to produce new products and services. In Denmark, Geomatic uses government data to develop market insights that it sells to clients for marketing and strategy development purposes. And in the United States, the company BrightScope has made a profitable business of using government data about 401(k) plans to help Americans saving for retirement understand the fees associated with these plans. Public entrepreneurs will explore such opportunities as a matter of course, throwing open the doors to a new era of innovation and growth.

¹⁰ For more information about Accenture's research into strategic supplier relationship management, please see <http://www.accenture.com/us-en/Pages/insight-strategic-supplier-relationship-management.aspx>

¹¹ OECD, *Government at a Glance 2011*. <http://www.oecd.org/gov/47887615.pdf>

¹² The Climate Group, Arup, Accenture and Horizon researched the opportunities created by smart city thinking, including those of the information marketplace. Please see the 2011 report, *Information Marketplaces: The New Economics of Cities*, at <http://www.accenture.com/us-en/pages/insight-cities-missing-smart-opportunity.aspx>

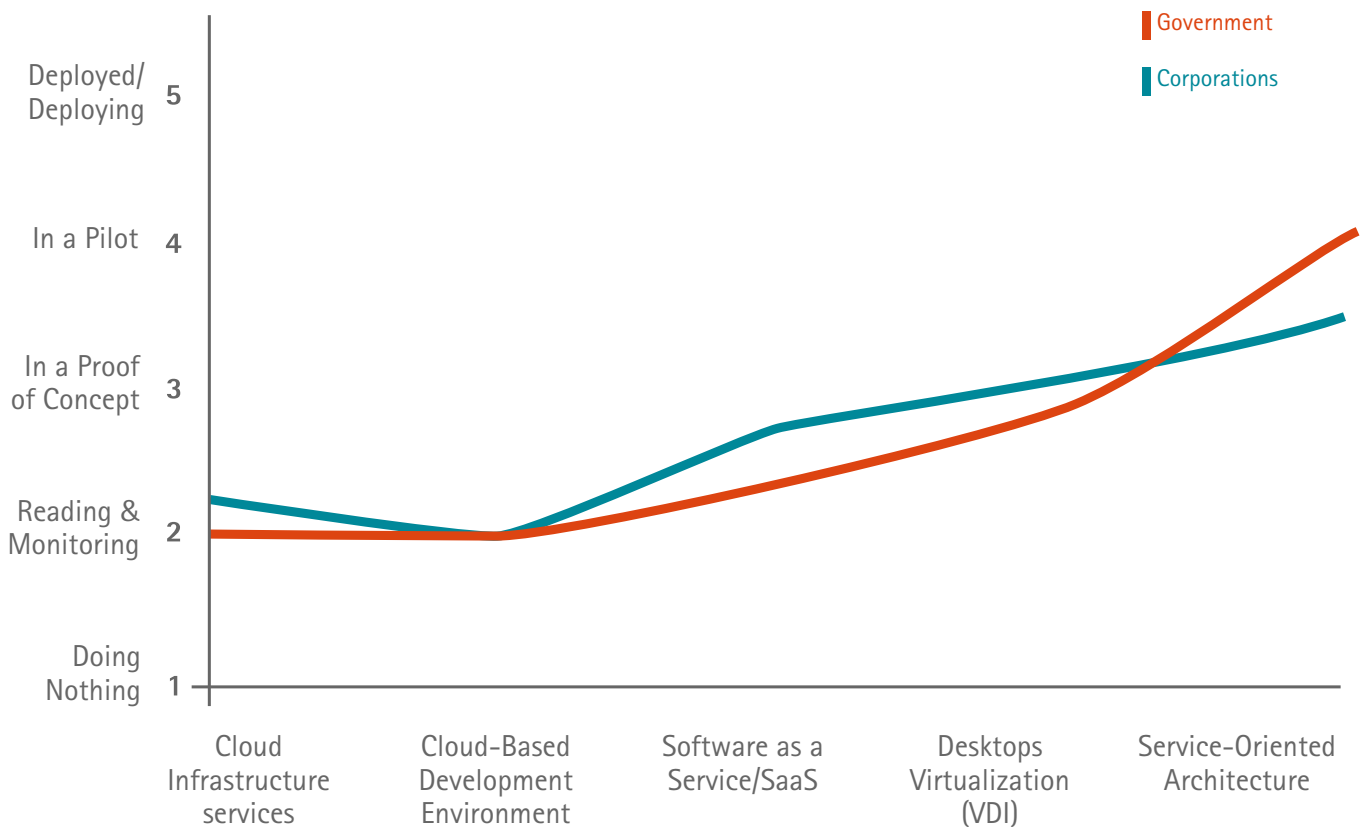


Figure 5. Adoption rates for emerging technology.
Source: Accenture High Performance IT Study, July 2011.

Harnessing technology to ease business interactions with government

As technologies evolve, they enable greater linkages across public services without the need to formally merge structures or processes. Indeed, we see public services increasingly using more flexible, cloud-based IT architectures to integrate services without the cost and expense of formally merging organizations. Our research shows that government adoption rates of the technologies that enable these flexible architectures approach those in the private sector (see Figure 5).

For businesses, the more government harnesses these technologies, the wider the door opens to more simplified interactions

with public services. One leading example is the Norwegian government's Altinn, which simplifies the interaction between government and businesses through a single connecting platform enabling portals and a case management system to cover the whole range of government agencies. Between 2008 and 2026, the Norwegian government expects Altinn to generate a net present value of approximately US\$1.6 billion, thanks in part to the savings that come from improved data quality and rationalizing data handling by the public authorities; the time savings for companies; and the tax savings for citizens that come from a reduction in the government's administrative costs.

Shifting Gears

In the next section, we look at the underpinning of public services of the future: mission productivity. In it, we explore how public services of the future will shift away from piecemeal efficiency efforts to drive productivity down to their very cores by reimagining their program goals, delivery models and approaches to asset management.

A man in a white shirt and tie is looking at a laptop screen in an office setting. The background is slightly blurred, showing office shelves and papers. In the foreground, a hand is holding a pair of glasses, with the lens reflecting a line graph.

Underpinning It All: From Budget Cuts to Mission Productivity

The shift to mission productivity implies broad and integrated thinking to better prioritize and manage initiatives, to restructure programs so as to eliminate the duplication of fragmented delivery and to leverage the considerable scale and assets of government as a whole.

While the global economic crisis has magnified the need for public services to be financially sustainable and operationally efficient, today many public managers quite simply battle to stay afloat. "Even if we do really well," explains Jay Gonzalez, Secretary of the Executive Office for Administration, Commonwealth of Massachusetts, "we still have the challenge of how to sustain the level of services we have today."

To close their expenditure and expectations gaps, public services must find ways to solve the "public productivity puzzle": to deliver better outcomes for the same or lower cost. From a pure financial perspective,

the impact of savings from increased efficiency is substantial. For example, Oxford Economics estimates show that if the US public sector had made efficiency savings of 1.5 percent a year over the past decade, the US government could have spent US\$482 billion less over that period and still deliver the same public services in 2011. That saving equates to 12 percent of total government expenditures over that 10-year period, or 34 percent of total tax revenue in 2011.

Currently, a number of countries now find themselves effectively bankrupt—and seemingly backed into a corner. Their service models are fundamentally unsustainable,

and they must either greatly increase public service productivity or reduce the services.

With reducing services the less palatable of the options and traditional means of squeezing out incremental costs no longer enough, governments need completely new ways to drive step changes in public service productivity. While the private sector has some levers for improving productivity that the public sector does not, governments can nevertheless take strong steps to improve; namely, making a structural shift from focusing on piecemeal efficiency initiatives to a focus on driving productivity through to its core.

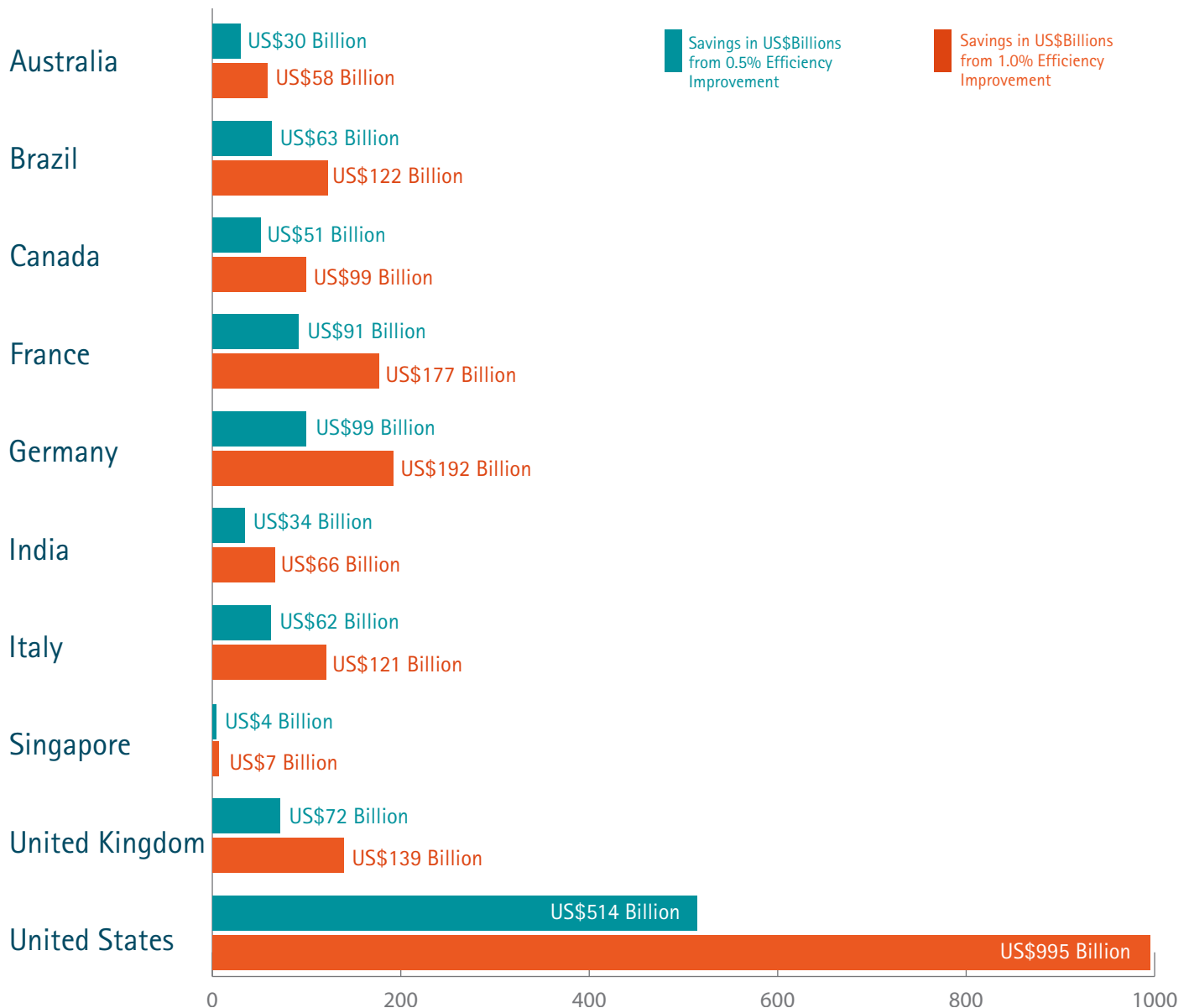


Figure 6. The "prize" for improving public service efficiency. Source: Oxford Economics, 2012.

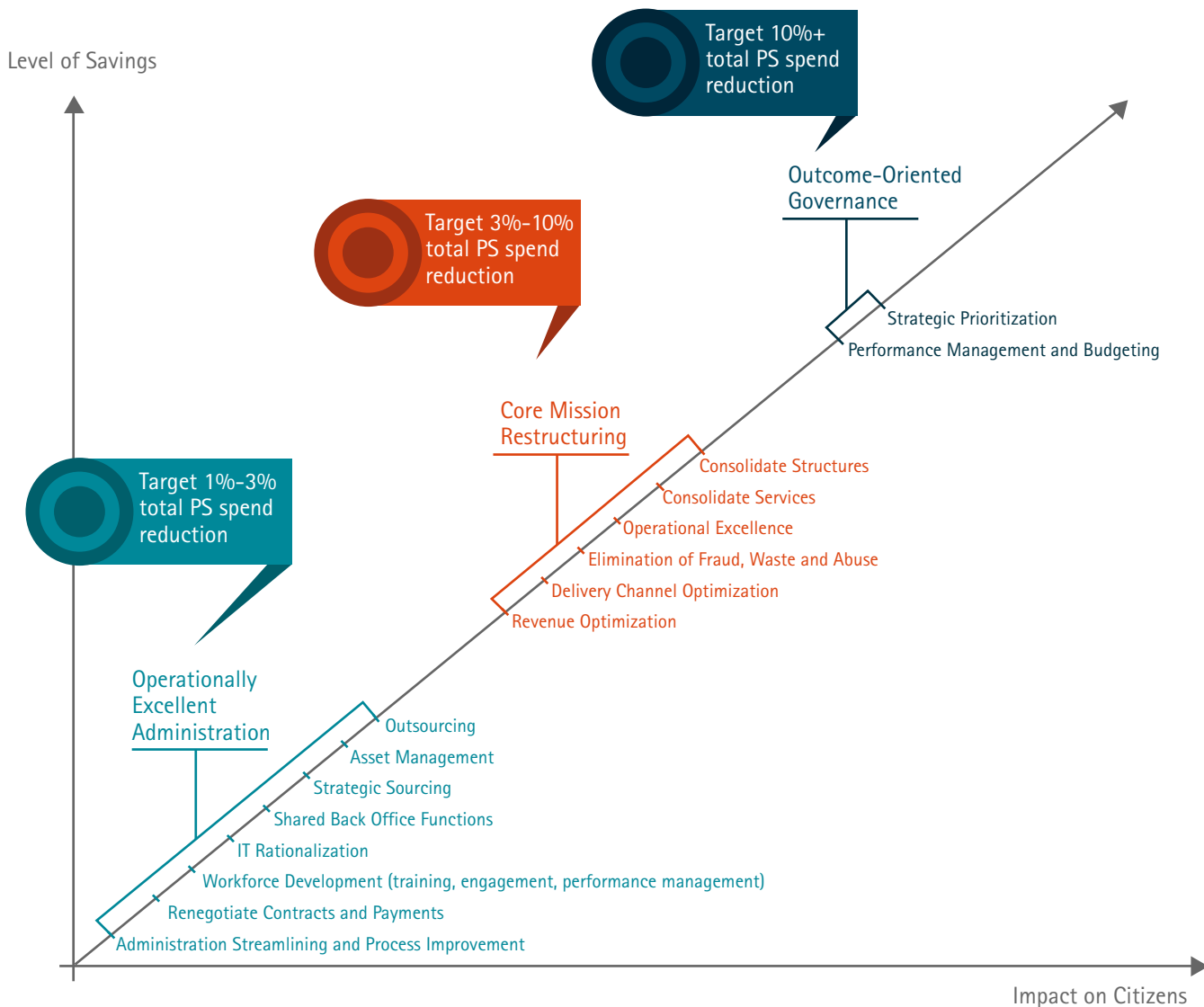


Figure 7. The many avenues for improving public service productivity.
Source: Accenture.

Mission productivity entails rethinking every investment and how it supports the achievement of desired outcomes. Efficiency has for so long been about, "How do we do something better?" Accenture proposes that governments need a different way of thinking: "What do we need to do differently to improve outcomes and save costs?" Mission productivity takes the concept of efficiency to an entirely new level—one that pervades every aspect of how public services are designed and delivered.

The prize for those that can drive mission productivity is significant. In the United States, for example, if public services achieved 1 percent annual efficiency gains, it would realize US\$995 billion in efficiency savings by 2025. Even a 0.5 percent annual efficiency savings would lead to US\$514

billion in savings. And as Figure 6 from our Oxford Economics modeling shows, the prize is significant in other countries too.

How Do We Get There?

From the leading examples we have seen, we have identified three key pieces underpinning the shift to broad productivity: outcome-oriented governance, core restructuring and operationally excellent administration. While many public services have addressed the pieces in isolation, what has been missing is an integrated approach that achieves long-term financial sustainability.

As Figure 7 shows, each of the three areas presents multiple opportunities for increasing public service productivity, but

we have outlined what we believe are the most critical in the sections below.

Outcome-oriented governance through prioritization and performance management

Prioritization

Prioritization means regularly reviewing what public services aim to achieve and what services should be delivered to support this aim. A structured assessment can refocus public administration around core goals with considerable impact, as shown by Canada's Program Review in the 1990s. The Canadian government's "Six Tests" process helped eliminate a budget deficit of 9.2 percent within three years and reduced federal government spend by more than 10 percent.

While full-scale prioritization efforts can be difficult, their impact can be profound: In Sweden, a priority review during the 1990s reduced average departmental spending by 11 percent, helping to move from a budget deficit of 10 percent into a 1.9 percent surplus within four years.¹³

Leading organizations embed evaluation and prioritization deep into their regular business planning processes, but these exercises may also be undertaken in response to a specific circumstance or need. Such exercises should be built around a structured mechanism, such as the Canadian Program Review's "Six Tests" framework. The Accenture Public Service Value framework¹⁴ can also guide understanding of which public services outcomes matter to citizens, and of how government can align itself most effectively to achieve them. Indeed, involving citizens gives prioritization exercises a broader legitimacy, and emerging social media and online participatory budgeting tools make such broad engagement increasingly feasible.

Performance management

Public leaders should establish organizational performance mechanisms to measure public service productivity and provide incentives for greater efficiency. For example, in Japan, the Saga prefectural government devised "Collaboration Testing" to improve public service delivery through collaboration with civil-society organizations (CSOs) and private businesses. In Collaboration Testing, the government discloses how it delivers public services and calls for proposals on how CSOs and private businesses could outperform the government. Unless it is clear that the government can do the best job, services are outsourced or agreements made for public-

private partnerships. Collaboration Testing has brought multifaceted changes in Japan's public administration—improving openness and transparency, strengthening leadership, and developing better mutual understanding between the public administration and the public.¹⁵

While public service organizations have increasingly adopted performance management to drive improved public services outcomes, they should also use performance systems to drive continuous improvements in value from their investments. Such an approach requires a budgeting process that rewards outcome delivery and shifts away from inflation-based budget adjustments.

Performance budgeting techniques, which bring performance and finance data and processes closer together, enable governments to better understand where money is spent, the impact of these activities and how to maximize the ratio of outcomes to expenditure. For example, the OECD has noted how Poland is introducing a performance-based budgeting system to "improve public finance management and strengthen allocative and operational efficiency, multi-year budgeting, and transparency and accountability."¹⁶

To support performance-based budgeting, governments will need performance management mechanisms (both at the organizational and individual levels) that strengthen incentives and accountability. In South Korea, for example, all public bodies must regularly review their programs through a self-assessment using the Total Project Cost Management System. Those programs rated by the system as ineffective face a 10 percent budget cut.¹⁷

As public entrepreneurs take on greater accountability, they should also gain more freedom to apply innovative methods of driving value for money. Performance contracting, where public services pay for outcomes and create value-based contracts, is one such method that can push the performance envelope and drive a culture of continuous improvement. For example, in the United Kingdom, a new trial initiative is using payment-by-results contracts in three prisons, putting a percentage of the contractor's annual revenue on the line against an improvement in outcomes, including reduced recidivism.

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13 http://www.ippr.org/images/media/files/publication/2012/11/saving-the-swedish-model_Nov2012_9896.pdf

14 <http://www.accenture.com/us-en/pages/insight-public-service-value-governance-framework-summary.aspx>

15 <http://unpan1.un.org/intradoc/groups/public/documents/un-dpdm/unpan045655.pdf>

16 <http://www.oecd.org/dataoecd/27/37/49071034.pdf>

17 "Better Policies Makes for Happier Citizens." <http://web.worldbank.org>

Core function restructuring

The second main area for optimizing efficiency is in the core functions of the agency. Public leaders will need to address the way core services are delivered if they are to make a significant shift in public service productivity. Across the world, Accenture sees public services continuing to deliver and operate in a highly fragmented way. The scale of overlap and duplication, and the costs associated with it, are often staggering. For example, consider that New York State alone has nearly 5,000 local government entities (from counties, cities and towns down to school districts, fire districts and library districts), as well as more than 1,300 other government entities, including more than 100 housing authorities; more than two dozen water, sewer and utility authorities; and 10 transportation authorities.¹⁸

At the US federal level, the Government Accountability Office (GAO) has identified overlap and redundancy in every cabinet-level department, representing billions in savings potential. For example, the GAO identified:¹⁹

- 44 overlapping federal employment and training programs
- Overlap among 18 domestic food assistance programs
- Opportunity to consolidate federal data centers across 24 federal agencies
- Fragmentation among 20 federal homelessness programs across seven federal agencies

Restructuring core functions through consolidation and collaboration allows governments to drive considerably higher levels of public service productivity through economies of scale and scope, which eliminate overhead and duplication.

In a notable example of consolidation, Service Canada has merged more than 70 services from across multiple agencies into a unified customer service organization that

groups its offerings around the needs of citizens, and has saved more than US\$278 million (CN\$290 million) in its first year of operations alone.²⁰ Norway's NAV merged the National Insurance Organization, the National Employment Service and the Social Welfare System to create a comprehensive and efficient labor and welfare administration. Similarly, New Zealand consolidated its number of local councils from 830 to just 86—resulting in significant administrative savings and streamlining of customer interactions.

Collaboration models come in all shapes and sizes, and as public leaders come under increasing financial pressures to think innovatively about how to achieve desired outcomes, we will increasingly see collaborations between different public bodies, as well as with non-governmental organizations. For example, in China local governments are using "purchase-of-service contracting," which sees private firms and non-profits providing public goods in areas such as education, healthcare and infrastructure.

Operationally excellent administration

The final area for optimizing efficiency is through operationally excellent administration functions that support and enable more productive core functions by first, leveraging the scale of government and second, better leveraging existing assets. We focus on these two areas because they are about getting the most out of what governments already have—critical in a time of fiscal constraints.

Leveraging the scale of government

Leading public service organizations are aggressively using their scale to drive efficiencies. For example, New Zealand's government agencies have begun jointly purchasing supplies such as vehicles, office supplies, air travel and legal services, and expect to save almost US\$300 million over the next few years. The potential efficiencies

in this area are huge: public procurement makes up more than 30 percent of many countries' total public sector spending, and in Accenture's experience with clients, strategic and collaborative sourcing approaches can drive 10–20 percent cost savings in as little as six months.

Public services can also tap into the power of their scale by leveraging shared services. For example, Singapore launched its multi-function shared services center, Vital.org, in 2006. Today, Vital.org serves more than 100 government agencies and 80,000 public servants with a staff of just under 500. Just through airline bookings services alone, Vital.org has achieved whole-of-government net savings of 20 percent of total air-spend.

Leveraging existing assets

In any country, the government is the largest holder of assets, and in Accenture's experience, the opportunities to unleash asset efficiency are enormous—down countless avenues. For example, public services may be able to monetize their assets by leasing the use of physical space to increase revenues. One national post reduced its asset base by utilizing analytics to dramatically increase the level of detail in its demand forecasting. For this particular organization, removing excess, underutilized equipment represented an opportunity to save US\$300 million overall.

In a cross-governmental example, western Australia has made moves to save more than US\$20 million per year—10 percent of current spend on office leasing and management—by consolidating and transferring some government offices out of the pricey Perth Central Business District and introducing sharing for certain facilities, such as reception and meeting rooms.²¹

These are just a few examples of an expanding array of alternatives for more efficient asset management, such as car sharing, sell and leaseback, asset redeployment, and even "start-to-finish" outsourcing, where a vendor not only leases the asset, but also manages it and maintains it throughout the entire lifecycle.

18 http://www.nyslocalgov.org/pdf/Local_Government_Count.pdf

19 <http://www.gao.gov/products/GAO-11-318SP>

20 http://www.iccs-isac.org/en/isd/cs_ser_can.htm

21 <http://www.mediastatements.wa.gov.au/Pages/default.aspx?ItemId=136475>

Conclusion

Accenture has launched our *Delivering Public Service for the Future* program recognizing that governments have not only a daunting challenge, but also a massive opportunity—given a framework of integrated action for grasping it. We have shown how growing gaps in public service expenditures and citizen expectations have created a difficult new reality for public leaders. But we have also shown how, using new technologies, new insights and new ways of working, public service leaders can close the gaps and begin creating fundamentally new relationships between citizens, business, society and public services.

As governments around the world emerge from the mode of crisis management

and budget balancing, the time to think strategically about the long term is now. A consolidated, integrated approach is vital. Realizing the vision of public service for the future depends on tightly interweaving the four structural shifts we have set forth here (from standardized to personalized services, from reactive to insight driven, from public management to public entrepreneurship and from piecemeal efficiency to whole-of-government mission productivity). When these pieces are fitted tightly together, a clear picture of the future of public services emerges: a flourishing society; secure and safe citizens; economic vitality; and a transformed cost base for government through dramatically increased public service productivity.

We recognize that enacting these shifts will not be easy. Understanding the problem and identifying a framework of potential solutions—these steps are just the start of the hard work of operationalizing transformational change. However, our global experience tells us that the techniques we have proposed will help governments negotiate a way forward through the significant structural shifts necessary to make public services more effective and more sustainable over the long term. This is our starting point; future installments of our *Delivering Public Service for the Future* program will dive deeper into the questions of operationalizing—“pushing out the corners” of the structural shifts we have laid out here. We are excited to join you on the journey.

Methodology

The Oxford Economics modeling framework considered the long-term impacts of economic and demographic changes on the future demand for public services in ten countries—Australia, Brazil, Canada, France, Germany, India, Italy, Singapore, the United Kingdom and the United States. A demand-driven projection of public service delivery expenditure is produced using demographic projections from the United Nations, anticipated price inflation for healthcare goods and services, combined with the impact that the rising wealth of a nation has on government expenditure.

Public service delivery expenditure is total public-sector expenditure conducted at the national and sub-national level—after the deduction of debt interest payments and unemployment-related payments. It is the amount of funding available to deliver public-sector services defined by the Classification of the functions of government, (COFOG), which was developed (in its current version) in 1999 by the Organization for Economic Co-operation and Development and published by the United Nations Statistical Division as a standard classifying the purposes of government activities.

The expenditure gap is calculated by comparing the demand-driven projection with the current trajectory for public-service delivery expenditure. The current trajectory is based on existing public-sector delivery models operating within existing and planned austerity measures, and a more sustainable growth path for government expenditure given projected country-level demographic, GDP, jobs and revenue growth. The trajectory assumes that government economic policy moves towards delivering a more sustainable budget deficit over the longer-term by reducing the deficit to a level that stabilizes debt compared to GDP by 2025.

The research also compared labor productivity growth for the public- and private-services sectors in eight of the countries (where the information was publicly available). Labor productivity is defined as the value added contribution to an economy per given labor input (i.e. employment).

Ipsos MORI, a global market research company, conducted a survey of 5,000 people in 10 countries in February 2012 as part of its omnibus survey Global @visor.

About the Accenture Delivering Public Service for the Future Program

Accenture's Delivering Public Service for the Future program comprises a series of research papers and perspectives on what public service for the future could mean, and what it will take to get there. Our goal is to inspire and support public service leaders to take a fresh look at the problems they face, to highlight innovative solutions to emulate, to present paths to progress they may not have considered, and to show how all the pieces can fit together.

The first piece in the program series is *Delivering Public Service for the Future: Navigating the Shifts*, a global report describing structural shifts and a framework of practical actions governments can undertake to increase public service productivity—delivering positive, sustainable public service outcomes. Future installments will explore these shifts in more detail, as well as other important enabling pieces. For more information, visit www.accenture.com/deliveringpublicserviceforthefuture.

About Accenture

Accenture is a global management consulting, technology services and outsourcing company, with 257,000 people serving clients in more than 120 countries. Combining unparalleled experience, comprehensive capabilities across all industries and business functions, and extensive research on the world's most successful companies, Accenture collaborates with clients to help them become high-performance businesses and governments. The company generated net revenues of US\$27.9 billion for the fiscal year ended Aug. 31, 2012. Its home page is www.accenture.com.