Customer Satisfaction Survey

Report Overview

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Contents

Acknowledgement

At the foremost, the Ernst & Young research team would like to thank the eGovernment Authority's executive management, marketing and business development team who have guided, facilitated and worked cohesively with the project team arranging the meetings with the 21 government ministries and agencies providing all the support needed in addition to facilitating the contact lists for the channel users.

The project team appreciates the time and patience of the participating Government ministries and agencies and their employees who participated in the survey, having found the time and effort to meet our team and address the survey questions.

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Furthermore a special word of thanks goes out to academic institutions such as Royal college of Surgeons in Ireland- Medical, University of Bahrain and the Arabian Gulf University who granted the research team access to their campus in order to randomly survey their students.

It is much noted that the constructive contributions provided by the nationals and residents for both the resident and the five channel surveys clearly demonstrated to the project team the strong support and aspirations people have for the eGovernment services and the desire to enhance them.

In conclusion, the study could not have been achieved without the inputs of 2,500 residents, from all walks of life, who participated in the survey despite their social and work commitments.

Glossary

The following abbreviations are used throughout this report

eGA	eGovernment Authority
eSC	eService Center
MP	Mobile Portal
NP	National portal
TF	Toll Free

1. Introduction

The Kingdom of Bahrain has strived to improve the productivity and efficiency of its Government services through streamlining processes and utilizing the Information and Communication Technology (ICT) platform as an enabler and driver of such change. The eGA has spearheaded efforts to utilize the excellent infrastructure the Kingdom has developed in order to deliver various services currently exceeding 200 using the five channels: the National Portal, the National Contact Centre, the eServices Centres, the Mobile Portal and eKiosks. The mechanism adopted by eGA to measure the satisfaction of the services has been the CSI and GTI indices.

In a bid to measure how far the eGA has reached in terms of customer satisfaction both within the two indices and across the channels, Ernst & Young (the Consultant) was commissioned to undertake the qualitative and quantitative aspects of the study covering:
- ► Update eGA's Customer Satisfaction Index (CSI) based on parameters set by eGA ;
- ► Update eGA's Government Transportation Index (GTI) based on parameters set by eGA;
- ► Assess the awareness and usage (access & reach) of the eGovernment programs among customers; and
- ► Measure eGA's customers satisfaction rates regarding the different channels.

The report comprises eight sections covering the residents, business, government ministries and the five channels. The awareness dimensions highlighted by the study are:
- ► Awareness of the eGovernment initiative at an overall level
- ► Awareness of the different services of eGovernment offered by the different entities and channels
- ► Awareness of the channels

The usage (access and reach) dimensions covered are:
- ► Access of eGovernment at an overall level
- ► Access of each service : what is the most used eGovernment service (Frequency of Access)

The channel user satisfaction covered the dimensions of:
- ► **Accessibility:** Are the services accessible enough? What is more accessible? Which channel?
- ► **Time saving for the customers**: The execution duration based on the new system
- ► **Cost saving**: money spent satisfaction
- ► **Quality of services :** perceived Quality regarding the different components of the eGovernment services
- ► **Relevance of services:** Till what point is the service irelevant for customers
- ► **Complaint system:** Quality and response time?
- ► **Ease of access:** The practice satisfaction regarding previous and new service
- ► **Channels availability satisfaction:** are they satisfied from what is existing or not? What would they like to add? What would they like to change?

The Customer Satisfaction Index (CSI) to be measured as developed by eGA comprises 17 attributes for both resident and businesses and they are:

Attributes of CSI	
1. Services in Arabic & English	10. Cost saved as compared to on location (travel and other direct cost)
2. User Friendly- simple steps to follow	11. Fee given for availing the service
3. Comprehensive guideline to use facility	12. Reliability of information
4. Safety and security of interface	13. Comprehensiveness of the information
5. Range of services offered	14. Relevant and useful information/ service
6. Time taken to execute the services compared to on location	15. Complaint registration system
7. Saving travel time to location	16. Time taken to address the complaint
8. Saving number of visits to avail the service	17. Outcome of the redressal system
9. Final delivery in line with expectation	

The Government Transformation Index (GTI) to be measured for residents and business comprises 13 attributes and they are:

GTI Residents & Business	
1. Efficiency of services delivery	8. Ability to find the right organization to deal with
2. Speed in execution	9. Integrated services to customers
3. Reduction of redundant information	10. The multiplicity of choice in terms of channels to benefit from a service
4. Availability of information	11. Number of e-service centers
5. Easiness of making a complaint	12. Availability of a portal (website) with all the needed information and services
6. Feed-back regarding a complaint	13. Timeliness of delivery of services
7. Status tracking mechanism	

The Government Transformation Index (GTI for Government ministries comprises 28 attributes and they are:

GTI Government	
1. Efficiency of services delivery	18. Easiness of making a complaint
2. Increase in number of transactions handled	19. Feedback regarding a complaint
3. Reduction in pending/backlog cases	20. Presence of audit trail activities
4. Integrated services to customers	21. Status tracking mechanism
5. Speed in execution	22. Ability to identify the owner of an activity /

6. Availability of information
7. Number of common services centres
8. Multiplicity of choice in terms of channels to benefit from a service
9. Availability of portal (website) with all the needed information and services
10. Accuracy of reports
11. Relevant services provided to customers
12. Reduction of redundant information in application forms
13. Ability to find the right organisation to deal with
14. Increase in the awareness of the eGovernment initiatives
15. Increase in the ICT usage of the officials
16. Number of trained officials to provide e services
17. Redressal of grievances within the defined service levels

result
23. Extent of data digitization of manual records
24. Process reforms to deliver services through the computerized system
25. Timeliness of delivery of services
26. Availability of MIS reports for decision making
27. PPP models established for delivery of services
28. Total number of services which are currently being delivered by PPP operators

2. Approach

The study was carried using an interactive approach covering both quantitative and qualitative aspects (see Figure 1 below). The surveys were captured using 8 questionnaires (residents, business, government and 5 channels) with data collected during the period from 11 March till 25 March 2012.
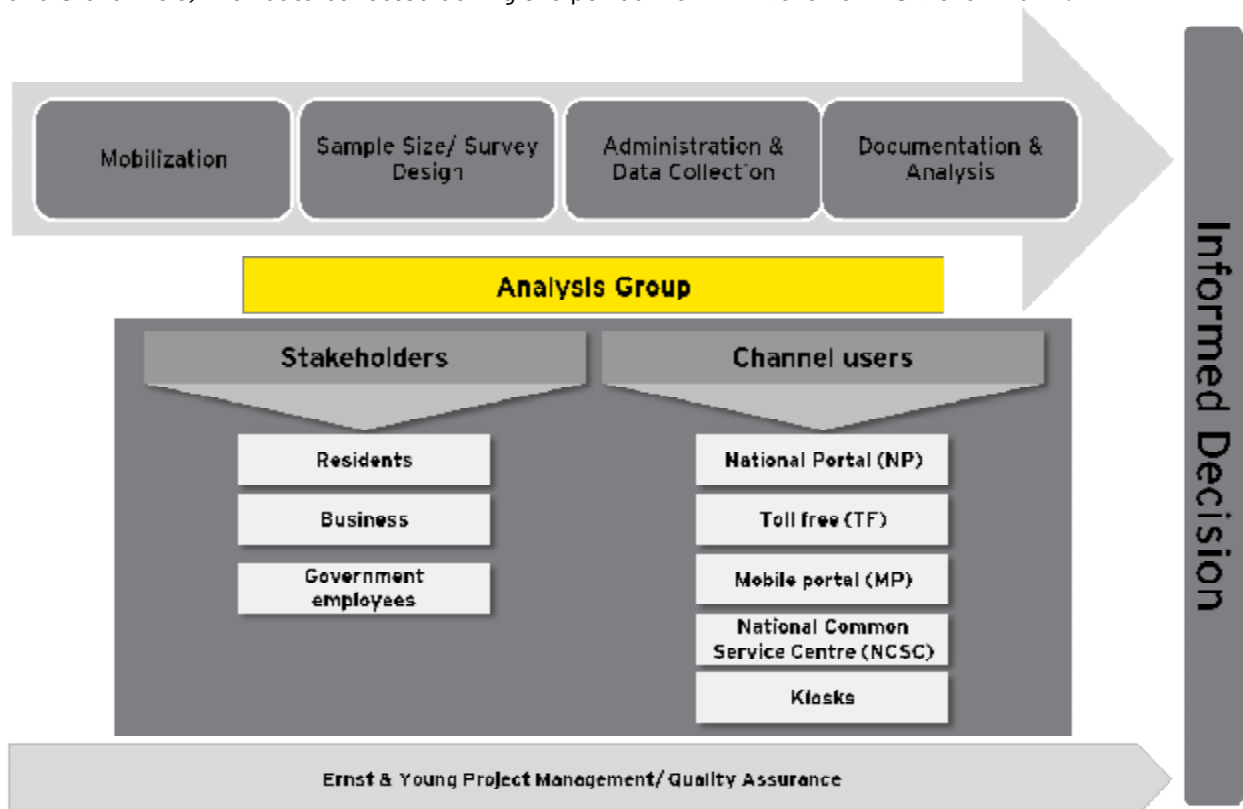

Figure 1-Survey Approach

2.1.1 Questionnaire Design

The 8 survey questionnaires were designed in both Arabic and English keeping in mind clarity, simplicity of the language and the need to capture maximum data in a timeframe that should not exceed 20 minutes. The questionnaires were developed with the research themes awareness and usage including the attributes of the CSI and GTI that would be used to update the indices.

The survey questions were designed to be multiple-choice, closed ended questions and in many cases utilising ranking to determine the criticality of certain issues. The key information collected represented major themes which could be extracted and analyzed and would allow cross tabulation. The questionnaires included the CSI and GTI attributes for the different categories. The channels questionnaires were developed to better suit telephonic interviews.

Pilot surveys were undertaken approved by eGA team, which helped to refine the final questionnaires. The data collection was carried out by trained collectors and the information was tabulated into excel and later exported into SPSS for cross tabulation analysis. Figure 2 provides an overview of the survey development cycle.
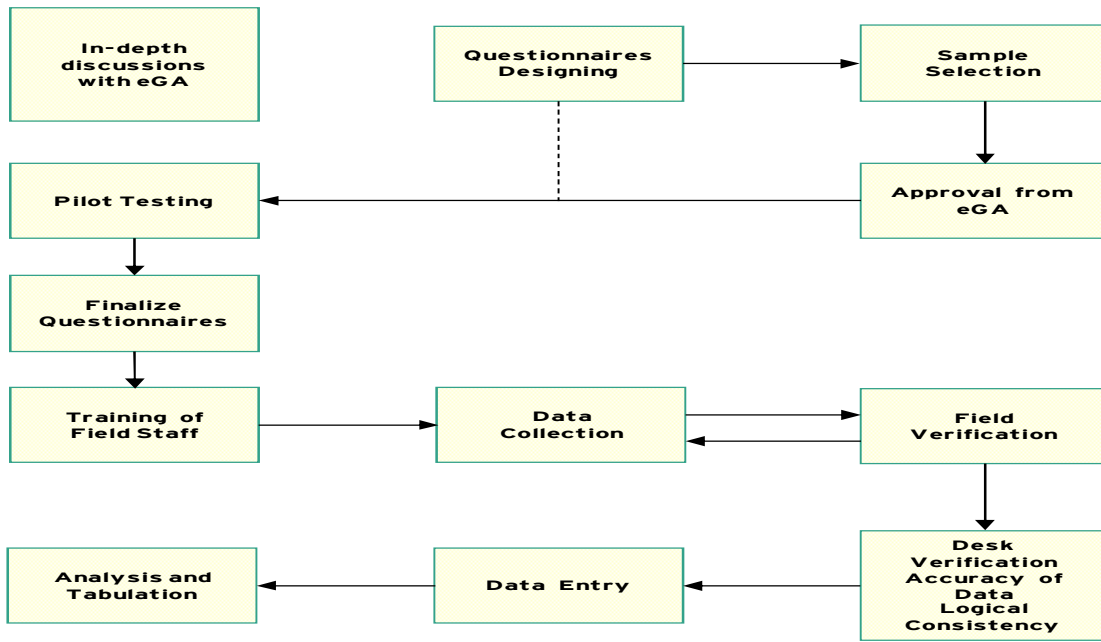
Figure 2-Survey Development Cycle

2.1.2 Determination of Sample Size

In order to be consistent with the previous study the sample size used for the study was arrived at through either through minimum pre-determined numbers or through statistical analysis. The final sample population was tested to ensure soundness and alignment to the success of the study (see Table 1):

Table 1-Sample Size

Segment	Methodology	Responses used for analysis	
Residents	Statistical verification exercise based on generalized sample with minimum & maximum acceptable size	*1,200*	
Business	Stratified random sample method	266	
Government	Preset numbers determined by eGA	223	
Channels	Preset targeted population as defined in eGA's RFP	**Total:**	**1,000**
		National Portal:	350
		Call Centre:	150
		Mobile Portal:	200
		E-Service Center:	150
		Kiosks:	150

To verify the sample size given by eGA for both residents and business, a statistical verification exercise based on generalized sample with minimum-maximum acceptable size was performed taking into consideration the strata categories of: age group, nationality, governorate and gender. The final number arrived based on a minimum sample size as per eGA requirements was 1,200.

Table 2 reflects the strata according to age group, nationality and gender. Numbers indicate sample size in every stratum. Green shows good representation of the sample (n>35), Yellow shows average representation of the sample (25<n<35) and pink shows a low representation of the sample. Overall representation of the various age group was strong except the above 55 population where representation is average. A total of 28 respondents did not provide complete set of information on age or nationality due to desire not to disclose this information.

| Age | Bahraini | | | Expatriates | | | Respondents |
	Male	Female	Total	Male	Female	Total	Total
15 – 18	17	29	46	7	5	12	58
19 – 25	97	94	191	60	38	98	289
26 – 35	153	97	250	151	66	217	467
36 – 45	86	28	114	80	11	91	205
46 – 55	51	20	71	31	17	48	119
Above 55	15	8	23	8	3	11	34
Blanks	3	1	4	2	5		28
Total	422422	277	699	337	145	480	1,200

Table 2: Strata according to Age group, nationality and Gender. Sample Size 1,200

2.1.3 Field Staff Training

Stringent quality control measures were adopted to ensure high quality of collected data such as:

1. Thorough training of field supervisors and surveyors.
2. Scrutiny of all filled-in questionnaires by supervisors.
3. Scrutiny of randomly selected filled-in questionnaires by the Survey Manager.
4. Random spot checks carried out by the Survey Manager.

Prior to the pilot survey being conducted a training session was held for the data collectors in order to provide proper training on how to conduct the surveys. The questionnaires were discussed in classroom environment and after training the data collectors (project team members) were requested to fill-in, the questionnaires considering other team members as respondents.

This step ensured the completeness and consistency and provided an opportunity to address any ambiguity and any logical mistakes in the responses. This practical exercise resulted in the field staff being familiar with the questions in the questionnaires, clarified exact meanings of the questions and provided them some practical experience about handling the respondents in the context of proposed survey.

The data collection commenced during the day over three weeks period focusing on approaching random sample businesses and residents, this is in addition to the channel user who were randomly selected from lists provided by eGA.

Customer Satisfaction Survey - Overview

2.1.4 Data Analysis

The scrutinized collected data from questionnaires were tabulated into excel. The entered information was verified against the information in the questionnaires with entry errors detected and corrected. After complete satisfaction about the accuracy of entered data, statistical analysis was carried out using the statistical software SPSS.

Figure 3 provides an overview of the data analysis framework adopted in order to stream line and effectively manage the data analysis stage.
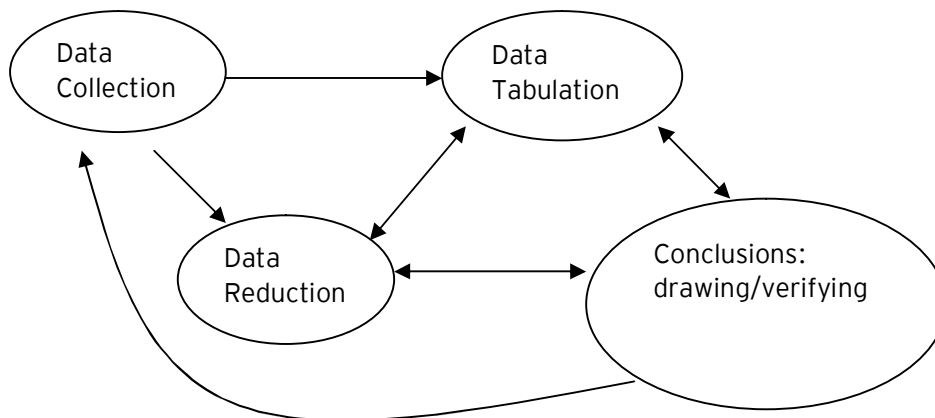

Figure 3-Data Analysis Overview

Ethical issues of confidentiality, informed consent and honest representation of findings were of paramount importance to the project team when conducting the survey.

During the study, the project team was aware of the latter issues and tackled them by securing consent of participants prior to data collection, adopting a logical and scientific approach in data analysis that guaranteed the proper representation of findings and prohibited the divulging of collected data to third parties.

The survey has a high level of reliability and validity achieved through an effective research methodology (proper sampling and effective administration of the questionnaires) and research execution that resulted in minimizing the error that could occur from misunderstanding the data collectors' questions.

As far as research limitations, due to recent incidents witnessed by the Kingdom in 2011 data collectors experienced some difficulties in getting participation for residents and through the channels.

2.1.5 Structure of the report

The detailed report has been presented by each analysis group as follows:

1. Residents
2. Business
3. Government employees
4. Channels
    a. National Portal
    b. Mobile Portal
    c. Toll Free number(Contact Center)
    d. e Service Center(Common Service Center)
    e. eKiosk

For each Analysis Group we have presented our findings in the sequence of the research themes and with suggestions and recommendations as appropriate. The general outline followed for each analysis group:

- Introduction
- Sample size
- Analysis and findings:
    o Awareness and usage
    o Transaction experience
    o Complaints and redressal
    o Customer Satisfaction Index (CSI)
    o Government Transformation Index (GTI)
    o Advertisement effectiveness
    o Suggestions for improvements

3. Environment

In order to appreciate the context of the study undertaken it is imperative to understand the demography, the business environment and the infrastructure in the Kingdom of Bahrain. This macro environment in which eGA operates and under which the study was taken can provide insight into either the results obtained or areas for future focus.

3.1.1.1 Population

The population of the Kingdom of Bahrain is almost equally split between the nationals and the expatriate workforce and their dependents with the expatriates being slightly higher.

As per the CIO and LMRA 2012 data, the population of Bahrain is over 1.2 million classified in the enclosed figure 4.
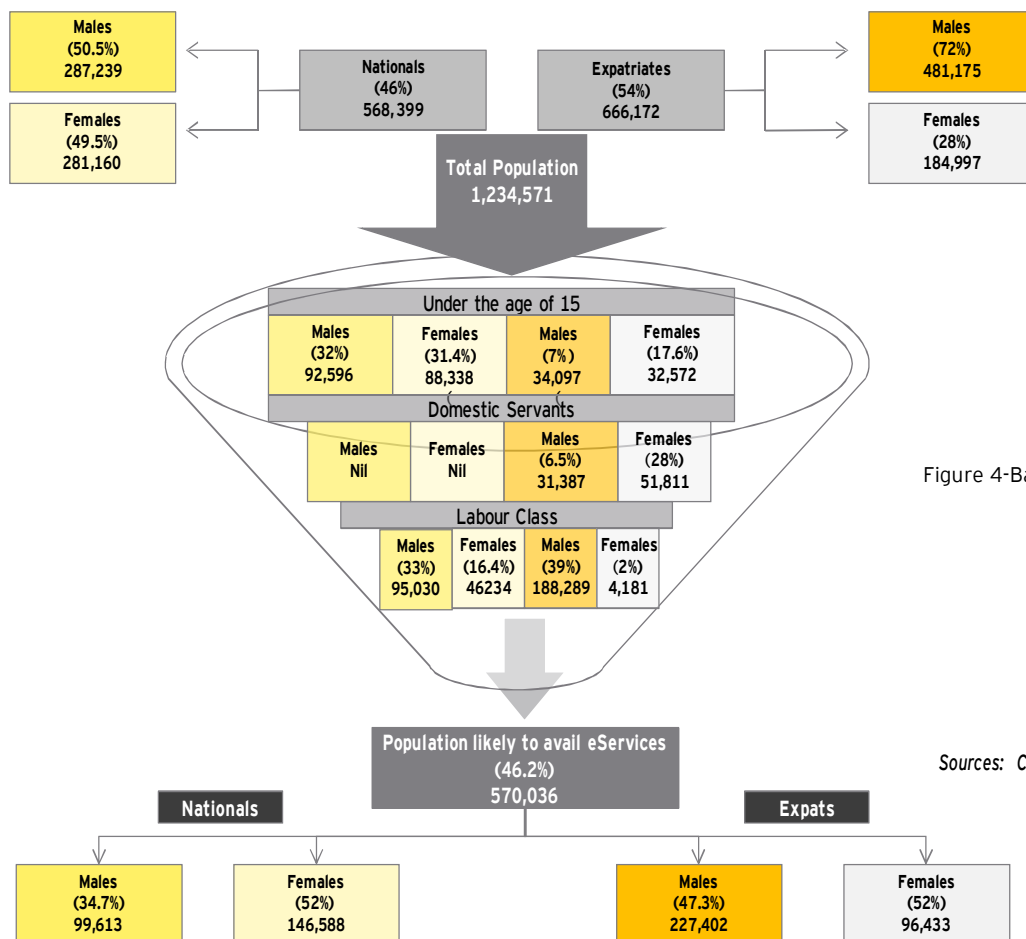
Males (50.5%) 287,239	**Nationals (46%)** 568,399
Females (49.5%) 281,160	

Expatriates (54%) 666,172	**Males (72%)** 481,175
	Females (28%) 184,997

Total Population 1,234,571

Under the age of 15

Males (32%) 92,596	Females (31.4%) 88,338	Males (7%) 34,097	Females (17.6%) 32,572

Domestic Servants

Males Nil	Females Nil	Males (6.5%) 31,387	Females (28%) 51,811

Labour Class

Males (33%) 95,030	Females (16.4%) 46234	Males (39%) 188,289	Females (2%) 4,181

Figure 4-Bahrain population

Population likely to avail eServices (46.2%) 570,036

Sources: CIO, LMRA/2010

Nationals

Males (34.7%) 99,613	Females (52%) 146,588

Expats

Males (47.3%) 227,402	Females (52%) 96,433

A further analysis of the population based on the age bracket indicates that the age group of 10 to 19 is significant in terms of nationals whereas amongst the expatriates the majority is in the age group of 25 to 45 (Table 3)

Age	Bahraini			Expatriate			Total Population		
	Male	Female	Total	Male	Female	Total	Male	Female	Total
<10	21.85%	21.34%	21.60%	5.21%	13.05%	7.38%	11.43%	18.05%	13.93%
10 - 14	10.39%	10.08%	10.24%	1.88%	4.55%	2.62%	5.06%	7.89%	6.13%
15 - 19	10.63%	10.36%	10.50%	1.41%	3.38%	1.96%	4.86%	7.59%	5.89%
20 - 24	9.84%	9.47%	9.65%	7.92%	10.50%	8.64%	8.64%	9.87%	9.10%
25 - 29	8.59%	8.35%	8.47%	21.23%	17.25%	20.13%	16.51%	11.89%	14.76%
30 - 34	7.34%	7.46%	7.40%	18.76%	15.73%	17.92%	14.49%	10.74%	13.08%
35 - 39	5.77%	6.16%	5.96%	15.39%	12.87%	14.69%	11.79%	8.82%	10.67%
40 - 44	5.59%	6.15%	5.86%	11.50%	9.48%	10.94%	9.29%	7.47%	8.60%
45 - 49	5.51%	6.09%	5.80%	7.58%	6.51%	7.28%	6.81%	6.26%	6.60%
50 - 54	4.64%	5.04%	4.84%	5.46%	3.69%	4.97%	5.15%	4.50%	4.91%
> 55	9.86%	9.50%	9.68%	3.67%	2.99%	3.48%	5.98%	6.92%	6.33%

Table 3: Age percentage of populations (source: LMRA data as of March 31, 2011)

Table 4 looks at the employment profile of Bahraini and Expatriates in both the public and private sector. The bulk of the workforce lies within the private sector and is primarily expatriates. It is interesting to note that based on research much of the expatriate workforce are laborers residing in labor camps. Hence all day to day life existence activities and interactions with Government ministries are managed by their sponsors.

Sector	Bahraini			Expatriate			Total employed		
	Male	Female	Total	Male	Female	Total	Male	Female	Total
Private	82,340	57,603	24,737	376,531	355,299	21,232	412,902	45,969	458,871
Public	45,099	25,006	20,093	11,950	8,906	3,044	33,912	23,137	57,049
Total	127,439	82,609	44,830	388,481	364,205	24,276	446,814	69,106	515,920

Table 4: Labour force break-up (source: LMRA data as of March 31, 2011)

A further analysis of the expatriate workforce by country (Table 5) reveals that the bulk is mail

Nation	Total	Male	Female
India	205,368	199,113	6,255
Bahrain	127,439	82,609	44,830
Bangladesh	77,960	77,679	281
Pakistan	30,354	30,041	313
Philippines	21,966	12,615	9,351
Nepal	16,180	15,727	453
Others	36,653	29,030	7,623
	515,920	446,814	69,106

Table 5: Labour force break-up by country (source: LMRA data as of March 31, 2011)

Similarly the dependents i.e. spouse and children also reflect similar trends with the maximum from the sub-continent.

Nationality	Total	Male	Female
INDIA	47,546	13,547	33,999
EGYPT	7,944	2,792	5,152
PAKISTAN	6,209	1,895	4,314
JORDAN	3,411	1,286	2,125
PHILIPPINES	2,632	782	1,850
BANGLADESH	1,983	596	1,387
UK	1,932	640	1,292
Srilanka	1,330	331	999
IRAQ	918	315	603
USA	783	275	508
Others	7,688	2,382	5,306
Total	**82,376**	**24,841**	**57,535**

Table 6: Expatriate composition (source: LMRA data as of March 31, 2011)

The educational background of the employees in private sector appears to be primarily below university level with the majority capable of reading and writing.

Educational attainment	Bahraini			Expatriate			Total employed		
	Male	Female	Total	Male	Female	Total	Male	Female	Total
Illiterate	8,112	2,111	10,223	30,731	1,064	31,795	38,843	3,175	42,018
Read & write others	12,066	3,574	15,640	134,415	4,696	139,111	146,481	8,270	154,751
Primary	2,180	497	2,677	46,903	1,046	47,949	49,083	1,543	50,626
Intermediate	5,913	1,305	7,218	38,087	1,622	39,709	44,000	2,927	46,927
Secondary	20,274	10,158	30,432	68,909	5,303	74,212	89,183	15,461	104,644
Post-secondary	3,579	2,645	6,224	10,932	2,193	13,125	14,511	4,838	19,349
	52,124	20,290	72,414	329,977	15,924	345,901	382,101	36,214	418,315
University(BA High Dip)	5,142	4,328	9,470	22,838	4,814	27,652	27,980	9,142	37,122
University(MA, Phd)	337	119	456	2,484	494	2,978	2,821	613	3,434
	5,479	4,447	9,926	25,322	5,308	30,630	30,801	9,755	40,556
Total	**57,603**	**24,737**	**82,340**	**355,299**	**21,232**	**376,531**	**412,902**	**45,969**	**458,871**

Table 7: Education level in private sector (source: LMRA data as of March 31, 2011)

This is further re-emphasized in Table 8.

Educational attainment	Bahraini			Expatriate			Total employed		
	Male	Female	Total	Male	Female	Total	Male	Female	Total
Below Graduation	90%	82%	88%	93%	75%	92%	93%	79%	91%
University and above	10%	18%	12%	7%	25%	8%	7%	21%	9%

Table 8: Education level in private sector as percentage (source: LMRA data as of March 31, 2011)

DEMOGRAPHIC PROFILE

a) The 10 to 35 age group amongst nationals is significant as compared to other age groups both among male and female population.
b) The educational profile of the Nationals in private sector employment suggests that graduates and above are only 12%.
c) Amongst expatriates the majority are in the age group of 25 to 45 age group
with the sub-continent forming a significant proportion of the expatriate residents.
d) Most of the expatriate workforce is single and blue collar with their education level being high school or lower level.

3.1.1.2 Business

The business environment in the Kingdom is dominated by small and medium sized enterprises.

Agriculture, hunting and forestry	177	30	12	8	5	6	
Fishing	1,239	177	5	1			
Mining and quarrying	37	10	6	12	3	2	1
Manufacturing	5,364	1,206	403	260	107	81	19
Electricity, gas and water supply	23	11	6	3		1	1
Construction	3,322	1,997	1,276	629	166	132	38
Wholesale and retail trade, repair	16,535	2,217	769	464	142	74	15
Hotels and restaurants	1,922	988	838	211	62	30	2
Transport, storage, communication	909	209	127	98	30	14	7
Financial Intermediation	256	112	67	65	29	29	6
Real estate, renting business activities	3,485	623	287	195	49	41	5
Public Administration	74	2		2			
Education	136	68	50	24	18	17	1
Health and social work	122	30	24	14	4	3	2
Other social, personal services	2,014	269	77	25	12	5	
Households with employed persons	42	6	2				
Extra-territorial organizations, bodies	113	20	17	5	2	2	
Other economic activities	3,110	332	64	39	1	2	

Table 9: Workforce per sector (source: LMRA data 2011)

The commercial registration as indicated by the Ministry of Industry and Commerce records exceeds 40,000 however not all these entities are active. According to secondary sources of information we estimate that there could be around 30,000 businesses which are active while the rest could be dormant.

> Some of the key features of the businesses in Bahrain are:
> - More than 50% of the small and medium sized firms:
>   - Do not maintain formal accounts or records and rely on informal methods
>   - Use third party assistance for carrying out their government liaison work
>   - Labour Market Regulatory Authority(LMRA) which issues the work permits indicates has stated that over 85% of the work permits it issues are based on online requests.
>   - Most entities use clearing agents who are trained by LMRA to use their systems and process their requests.

3.1.1.3   Information Communication Technology Infrastructure

The Kingdom of Bahrain has been one of the pioneers in the adoption of Information Technology on the region. The establishment of Central Informatics Organisation and the Government Data Network(GDN) linking up the entire government ministries and agencies has facilitated the platform for the introduction of the eservices through.

The establishment of Telecommunications Regulatory Authority (TRA) and the introduction of healthy competition in the telecom sector have provided the impetus to rapid growth in the effective use of technology by both businesses and residents in the Kingdom of Bahrain. The internet penetration is one of the best in the region both in the residential and business areas as can be seen from TRA analysis

Fixed Line	Mobile Service	Internet Service
► 242,000 fixed lines in Bahrain ► 60% of fixed lines are for residential use	► 1.7 million mobile subscribers ► 94,000 BlackBerry subscribers (end of 2010) (6% of mobile subscribers)	► 290,000 internet subscribers/ broadband subscribers ► Mobile broadband represents 44% of broadband customers
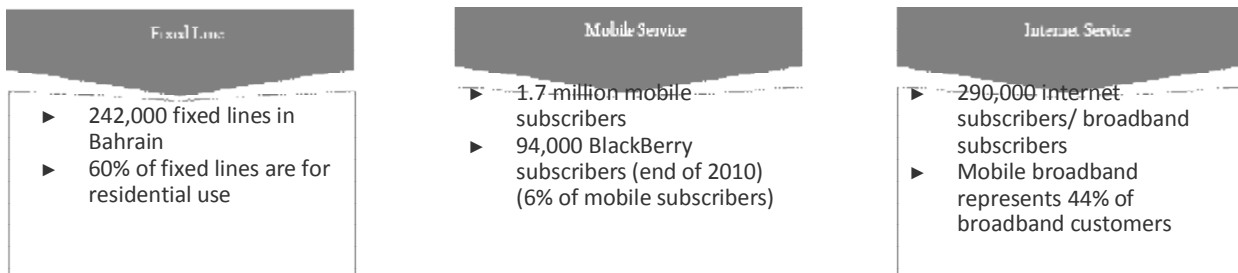
Broadband Subscribers	2010	2009
Residential	194,254	149,581
Business	9,943	8,754

4. Executive Summary

Since inception, Bahrain's eGovernment Authority (eGA) has sought to develop and enhance the Government services offered to society through streamlining and simplifying their accessibility and engaging various stakeholders, in order to identify and pro-actively respond to areas for improvement.

In order to assess the level of satisfaction on an ongoing basis, the eGA introduced in 2008 the Customer Satisfaction Index (CSI) and the Government Transformation Index (GTI). The customers of eGA have been classified into three categories residents (citizens and expatriates), businesses and Government ministries. The indices CSI and GTI have been updated on an annual basis providing clear indicators for the level of success in the awareness and usage of services among the eGA customers.

The indices are calculated and updated through inputs arrived from quantitative surveys targeting eGA customers (targeted residents, businesses and Government institutions). Qualitative feedbacks documented during the surveys have provided guidelines on areas for overall enhancement of the eGovernment services.

In 2012, the eGA commissioned Ernst & Young (the Consultant) to undertake the update study of the two composite indices CSI and GTI and to measure the level of satisfaction for the various eGA channels used to deliver services: *the National Portal, the National Contact Centre, the eServices Centres, the Mobile Portal and eKiosks*.

The study revealed that the overall trend in the customer satisfaction indices indicates a reduction among the residents from 92% (2010-2011) to 79.5% while the CSI among business indicates a decrease from 93% (2010-2011) to 77.3%.

A similar declining trend was witnessed for the GTI for residents dropping from 79% (2010-2011) to 78% while the business decreased from 98% (2010-2011) to 81%. In the case of the GTI for government what was seen is a positive increase both in the 13 attributes scale index increasing from 72% (2010-2011) to 74% and the 28 attributes scale index increasing from 67% (2010-2011) to 72%.

In terms of channel satisfaction, the emerging reality was that mobile portal usefulness increased from 70% (2010-2011) to 84%. The usefulness of the ekiosk remained unchanged while the national portal, national contact centre and the eServices Centre all had a declining trend in terms of usefulness. The level of satisfaction across all the channels was in decline.

The current study added a new dimension through the utilization of the social network-facebook in order to reach out to eservices customers. The emerging reality was that the majority of the respondents 70.6% were of the opinion that the eGovernment services had a positive impact on their life through facilitating the services and saving the time.

The following pages of this section, presents an extract of the key findings from the Residents, Business, Government and Channel Reports respectively.

4.1 Key Findings: Residents

The analysis was carried out by classifying the respondents into 3 distinct groups:

- ► Those who are not aware of the eGovernment services;
- ► Those who are aware but have not used eGovernment services; and
- ► Those who have used the eGovernment services.

The summary of these 3 groups by nationality are:
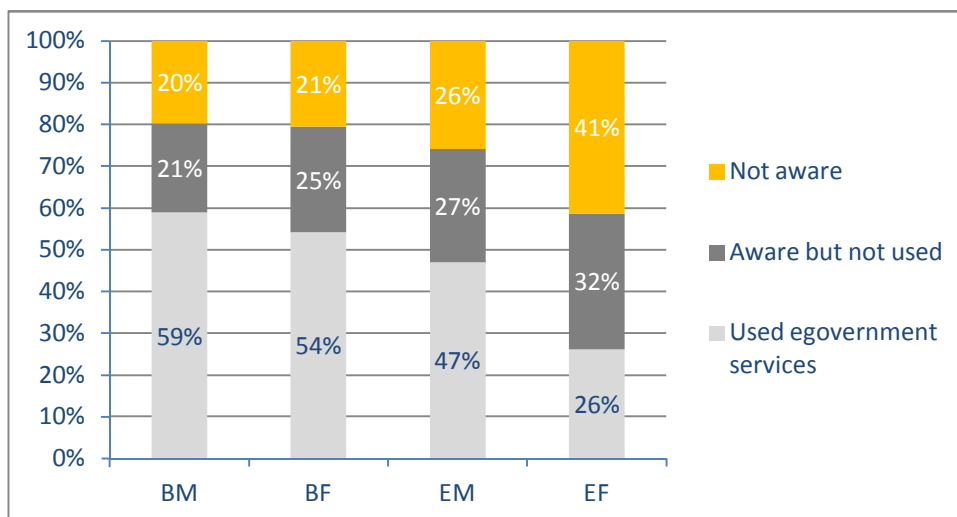
BM: Bahraini Male, BF: Bahraini Female, EM: Expatriate Male, EF: Expatriate Female

Lack of awareness is prevalent in all groups and is high among expatriate females, expatriate males followed by Bahraini females and males.

There appears to be a direct correlation between dealing with government agencies and the awareness about eGovernment services. Out of the surveyed respondents 65% deal with government agencies and the remaining 35% do not directly deal with any government agency.

Bahraini males followed by expatriate males and Bahraini females deal or interact with government entities 81% of those who interact with government agencies are in the age group of 19 to 45 and with age group of 26 to 35 being the single largest segment

It is significant to note that Bahrainis both male and females in the age group of 19 to 25 appear to be dealing with government agencies as the second largest segment

As for as location is concerned the Capital Governorate followed by Northern and Muharraq appear to have residents who interact with government

The top three services used/ accessed by respondents who interact with Government Authorities/ Departments are: "Payment of Electricity and Water Bill" (59%), "Smart Card Appointment" (59%) and "Payment of Traffic Contravention" (55%).

Capital Governorate is the maximum populated location and also the one which has more number of residents who do not appear to interact with the government agencies. The expatriates in Capital governorate form a major portion of those who are not aware in the Capital Governorate
A section of the Expatriates males and females do not deal or interact with the government as the employer

takes care of their dealings and with respect to females most of them are housewives.

24% of the surveyed respondents are not aware of the eGovernment services.

The not aware group consists of people who do deal with government agencies (27% of those not aware deal with government agencies) as well as those who don't have the day to day need to deal with government services.

The awareness is less among students, housewives, expatriates and residents of Capital Governorate especially the expatriates in Capital Governorate

The main reason appears to be that they do not need to do government related work or deal with government agencies.   In addition the preference for direct interaction and lack of technology awareness are reasons for not being aware of the eGovernment services

It is interesting to note that at least 31% of those not aware of the eGovernment services have used other online financial transactions

76% of the respondents are aware of eGovernment services.

The top 3 sources of awareness are:

- ▶   Friends (29%);
- ▶   English News Papers (28%); and
- ▶   Bill Boards (26%).

79% of respondents are aware of the National Portal, while the second and third highest ranked channels are the Toll Free Number (50%) and the Kiosks (38%).

Out of the 76% respondents who are aware about eGovernment 33% have not used eGovernment services.

The 3 top reasons given for not using eGovernment services are:

- ▶   Not responsible for these transactions
- ▶   Prefer direct interaction and
- ▶   Do not have credit card

It is significant to note that at least 40% of those who have not used the eGovernment services have used other online financial transactions.

Both the not aware and aware but not used groups recall seeing the eGovernment advertisements in recent times. However majority of them were either somewhat clear or confused about the message in the advertisements.

Usage

51% of the total respondents indicated that they have used the eGovernment services. 17% of the total respondents have used single service, 12% have used 2 services and 23% have used more than 2 services.

The top 5 services used are:

- ▶   Smart Card appointment

- ► Electricity and Water bill payments
- ► Traffic Contravention
- ► Vehicle registration and
- ► License renewal.

The eWeather, flight information and postal tracking, University of Bahrain results are other services that have been used

The national portal (90% or more) is by far the most used channel for transacting eGovernment services and all other channels appear to be relatively underutilized.

3% of those in the do not deal with government category also have used the eGovernment services and those have been basically University of Bahrain results, traffic contraventions and information related services.

88% of those who used the eservices have done so within the past 1 year.

16% of the total respondents(i.e.31% of those who used eGovernment services) are not satisfied with the confirmation or proof of completion of service and would prefer additional confirmation through SMS

27% of those who used the eservices have encountered issues or problems.

The issues encountered appear to be mainly the following
- ► System glitches at the time of processing payments,
- ► Time lag between making the payment using eGA channel and the actual effect of the payment in the service provider's system. There were instances reported by the EWA authorities during the qualitative discussions that the call center of EWA would follow up on outstanding by calling customers who invariably complain that they have already made the payment through eGA. This issue according to the EWA has been resolved.

Smart card appointment has also thrown up some complaints and the issue is that CIO sometimes refuses to acknowledge the appointment date and time as it is not reflected in their system or physically it takes time at CIO to attend to the customer.

In terms of time taken to resolve the issues, the respondents appear to be inclined more towards acceptance of the time taken than being dissatisfied.

I n terms of transaction experience with respect to the following 4 parameters
- ► Clarity of instruction to avail the service,
- ► Ease of accessing the service
- ► Time taken to complete the transaction and
- ► Confirmation/ proof of completion of service

Respondents appear to be generally satisfied for most of the services with no notable exception.

Communication with eGA

37% of the total respondents stated that they were aware that they can communicate with eGA and about 10% of the total respondents had communicated with eGA. Bahrain.bh form is the most preferred method used for communicating with eGA followed by Facebook, Youtube and blogs

There is a 43% neutral response on eGA's response to customer communications which indicates that customers are not satisfied with the eGA's response.   With social networking and the eGA's intent to engage

the residents in the improvement of government services some thought could be given to engaging those who communicate with eGA by automated acknowledgement response and frequent follow up messages such as thank you for your valued suggestion and it is being actively considered or being implemented or might be considered in future.

With respect to the specific questions on the recent advertisement campaign of eGA, the respondents irrespective of being aware of the eGovernment services had seen the advertisements either within that month or within 3 months

The preferred channels of communication are:
- ► Bill Board
- ► Lamp Post and
- ► English Newspaper

The preferred medium of communication:
- ► Daily newspaper
- ► Bill board
- ► Television
- ► Radio

On the clarity of the advertisements, 36% of the total respondents found it attractive and easy to understand while an equal percentage felt that the advertisement was somewhat clear and 8% felt that it was very confusing.

Enhancement of delivery channels aesthetics and more clarity, Single sign on and additional payment options are some of the factors highlighted by respondents as the changes that they would like to see in the government services. On line banking and use of means to settle payments other than through credit card would encourage people to consider using eGovernment services

There is a general appreciation of the benefits of eGovernment services in terms of time saving, flexibility of usage. Etc.

There is very low awareness about e-initiatives such as Qudrat, elearning regarding tendering process, etc.

The services preferred are:

- ► Telecommunication payments
- ► Hospital appointments
- ► Social Insurance Organisation services

71% prefer English as the language of communication followed by 43% Arabic and 5% Asian languages.

93% of those who responded have indicated that they would recommend eGA services to others and only 7% stated that they will not recommend eGA services to others.

CSI & GTI

Based on the 17 attributes provided by eGA in line with 2009 - 2011 study for CSI calculation, the CSI for residents was 79.5 as compared to 92 in wave 4.

The reasons for deviation analysed by service indicates:

- ► Almost all attributes of Smart Card appointment are less than the overall CSI scores
- ► The grievance redressal attributes in EWA payments are lower as compared to overall scores
- ► The instructions and information attributes relating to Vehicle Registration and License renewal are lower than the overall CSI scores

The reasons for deviation analysed by nationality indicates:

- ► Smart card appointments, Bahrainis both male and female and expatriate males have lesser satisfaction on fees paid and Bahrainis have issues with comprehensiveness of information
- ► Similarly with respect to EWA payments the satisfaction level with respect to grievance redressal is low amongst Bahrainis and expatriate males

GTI
Based on the 13 attributes provided by eGA in line with 2009 - 2011 study for GTI calculation the overall GTI for Residents is 78 in Wave 5 as compared to 83 in wave 4. We have analysed the reasons for the deviation and find that there is not much of a major deviation except that for some attributes there has been more neutral responses as opposed to satisfaction.

Recommendations

The not aware and aware but not used eGovernment services group appear to link eGA services to only government related services.

Direct interaction is preferred by a section of Bahrainis but other than that usage appears to be linked to government services only

The overall analysis of the not aware and aware but do not use eGovernment services indicates that awareness has at least 3 dimensions to it. They are:

- ► First dimension is the basic understanding and appreciation of eGA the service provider,
- ► Second dimension is the services provided and the nature of those services and
- ► Third dimension is the eGovernment channels available for availing the eGovernment services.

For instance not all those who are aware of eGovernment services or for that matter users of eGovernment services are aware of the range of services and/ or all the delivery channels available to them. In addition not all services provided by eGA are payment related. The fact that people who are not aware of the eGovernment services have observed the eGA advertisements but could not comprehend the purpose supports the need to customize the awareness campaigns of eGA to cover all the 3 dimensions of awareness.

The awareness campaigns have also to address the relevance of eGA services to residents and visitors. Information services such as flight information, postal tracking etc are useful to most residents irrespective of their need to deal with government.

eGA should tailor the awareness campaigns to suit the target groups and the dimension that they wish to create awareness on. The first and foremost priority should be to have an image makeover for the eGA from being provider of only government related services to one of resident friendly entity.

With respect to services offered and the payment options such as acceptance of debit cards is not clear to many of the residents. Based on secondary sources of data there are about 200'000 credit card holders and about 600,00 debit card holders as of December 2011 in Bahrain. The fact that many residents still believe that they need a credit card to deal with eGovernment services needs to be corrected

In terms of choice of media while the common preference could be Radio and Television, there is a difference in the viewership or choice of channels, While Bahrainis and other Arab nationals and Westerners could be patronizing certain satellite service providers, the Asians watch prefer different satellite channels. Similarly the choice of radio is different as well. With respect to Asian expatriates the radio channel 104.2 has an effective reach. LMRA did successfully use the radio channel to get across messages to the expatriates especially the Blue Collar workers.

eGA should conduct workshops and seminars for specific targeted audience. Examples are like the one conducted for mums in Bahrain community, residents through their respective societies and national associations Indian Ladies Association, Pakistani Women's association, British Club, to cover the expatriate females

eGA should also interact with Embassies to promote the use of EGA services amongst expatriate residents

Amongst nationals the target group should be the schools and universities. The age group of 10 to 19 is where 20% of the Bahraini population is in currently and they are the future patrons of the eGA, So eGA could consider engaging them through workshops and also provide services of interest to them such as event calendar, local sports updates, and expert advice help for studies. eGA could also consider running competitions for web design and service innovation among youth.

To persuade the counter users to try out the eGovernment channels concerted weekly campaigns can be held at various government agencies' counters by having stalls with laptops for self use by anyone who enters the counters, By experimenting and trying to complete the transaction users tend to get familiar and eventually will start using the service.

Delivery channels

Re-design and introduce more kiosks at high foot fall locations but with privacy to transact
Enhance the appeal of the website by having more user friendly welcome page
Introduce eGA mobile specific apps
Incentivise use of channels other than national portal through competitions such as for every five transactions used through a channel a chance to enter a draw for Ipad, etc can be thought about
Run campaigns to promote CSCs and toll free number
Train CSC agents to be customer friendly
Introduce incentives such as CSC of the month award for best performing CSC in terms of error free transactions processed in a month
Work closely with telecommunication providers to offer add ons to their data packages

Services and transaction experience

Fix the shortcomings identified by the CSI attributes analysis in Smart Card appointment, EWA grievance redressal, vehicle registration and license renewal services
The portal aesthetics require attention as many respondents indicated that the contents look cluttered and busy. There is a need to also revisit the instructions and steps involved in completing any transaction.

Introduce single sign on with secure and unique id

Enabling users to create favourites or group services together in their log in home page so that every time they log in they can carry out all these transactions together.

Enabling transaction log and payment history as applicable would probably increase the confidence and trust of the users as their will be a trail or log of the transaction available for future reference.

Build trust in online transactions by assuring users of security features, additional validations and protection

of privacy of information
Work on legislation to enable digital signature recognition

Consider introducing alerts through emails or mobile apps to end users on any of the services relevant to the users such as traffic contravention as and when it happens, EWA bill when it is issued, etc.

Consider alternate payment options such as direct debit to bank accounts, prepayment options, etc. Explore cash collection through Kiosks, arrangements with banks for online banking transfers and introduction of eDinar services

In addition to the annual award for usage introduce schemes similar to loyalty programs offered by retailers / airlines

Introduce non-governmental transactions such as payment of telephone bills, medical appointments in private clinics and information services such as whats on, cinemas, taxi bookings,etc

Introduce a formal annual review process in conjunction with the original service provider of the whole transaction process and identify opportunities for improvements

Respond to user suggestions promptly and encourage more inputs from users

Explore tie ups with hotels and car hire agencies to provide comprehensive services o any visitor applying for evisa. This could also be a source of additional revenue for eGA.

Capacity Building

Engage teenagers through offering services of interest to them such as sports updates, and advice help for studies

Offer free internet training to non-users
Attract non-users by offering common use information services through eGovernment channels

Introduce web based training for both service providers and users

4.2 Key Findings: Business

Government Interaction: 84% of the respondents indicated that they interact with Government Authorities/Departments while the remaining 16% do not interact with Government Authorities/Departments

From the respondents who do not interact with the Government Authorities/Departments, 53% indicated that their services are taken care of by third parties

Top three services used: The top three services used/accessed by respondents who interact with Government Authorities/Departments are:

► Payment of electricity and water(77%)
► Renewal of commercial registration (69%)
► Apply for an eVisa (51%)

Awareness of the top three agencies used: The top three agencies that the respondents are aware of are:

► Electricity and Water Authority (76%)
► Labour Market Authority (74%)
► Social Insurance Organization (62%)

Mode of Access: 53% of respondents indicated that use a single channel to access government services while 41% use multiple channels. The two sectors with the highest level of single channel utilization are the wholesale and retail and manufacturing sectors. The two sectors with the highest level of multiple channel utilization are the wholesale and retail and construction sectors.

Single Channel: From the respondents that use a single channel to access government services, 39% of respondents indicated that they use eGovernment channels while 38% use counters. The sectors that have the highest utilization of eGovernment channels to access government services are manufacturing, construction and wholesale and retail. The sectors that have the highest utilization of counters to access government services are manufacturing, construction and wholesale and retail and transport, storage, communication sectors.

Non Awareness of eGovernment services: 8% of the respondents have indicated that they are not aware of eGovernment services. The main reason for non awareness include:

► No need to use eGovernment services (10%)
► Use a third party to deal with eGovernment services (5%)
► New to Bahrain (5%)

Awareness of eGovernment Services: 92% of the respondents indicated that they are aware of eGovernment services. The two sectors that show the highest level of awareness of eGovernment services are the wholesale and retail and manufacturing sectors.

Top three modes of awareness: From the respondents who are aware of eGovernment services, the top three modes of awareness that effectively advertised eGovernment services are

- ► Bill Board (50%)
- ► Newspaper – English (37%)
- ► Newspaper – Arabic (22%)

Benefits of eGA services: Respondents have indicated that there are benefits when carrying out their transactions through eGovernment services. The top three benefits are:

- ► Time saving (48%)
- ► Cost saving (38%)
- ► Transact from anywhere (37%)
- ► Transact at any time (37%)

Encountered Issues: 50% of the respondents indicated that they faced no issues while availing eGA services while 34% indicated they do face issues when availing eGA services. The remaining 16% did not provide any response.

From the respondents who indicated that they faced issues when availing eGA services, some of the main issues include:

- ► eGovernment system service disruption (61%)
- ► Others (39%)
- ► Provision of incorrect information (20%)
- ► Telephone disruption (8%)

Recommend eGA services: 92% of the respondents indicated that they would recommend eGA services to other people.

Value Added Services: 46% of the respondents indicated that they would use value added services even if those services are offered at cost, 37% of the respondents indicated that they would not used those services if offered at cost and 17% of the respondents did not respond.

Legal Framework: 48% of the respondents indicated that they are willing to use eServices if the government provides a legal framework (e-Transaction laws, e-Signatures, etc.), 19% indicated that they are not willing to use eServices regardless of a legal framework and 33% did not respond.

Online Financial Transactions: 72% of the respondents indicated that they use online financial transactions. From this population, 60% have indicated that they use eGovernment services while 40% have not used eGovernment services. The top three reasons for not using eGovernment services include:

- ► Services performed by third party (28%)
- ► Prefer direct interaction (23%)
- ► Not aware that services are covered by eGovernment services (13%)

Further analysis indicates that the sector that carried out the highest level of financial transactions using online mode other than eGA is the wholesale and retail sector.

Communication: 71% of the respondents indicated that they do not communicate with eGA regarding services, 14% of the respondents communicate with eGA while 15% did not respond.

From the respondents who communicate with eGA regarding services, the top three

communication channels include:

- Contact us form on Bahrain.Bh (43%)
- Bahrain.Bh feedback form (14%)
- FaceBook and eGovernment blogs (8%)

Customer Satisfaction Index (CSI): The overall CSI for business is 77.3 in Wave 5 and 92.85 in wave 4. The main attributes that reduced the CSI in wave 5 include:

- Comprehensive guideline to use facility (91 wave 4 – 69 wave 5)
- Fee given to avail the service (93 wave 4 – 68 wave 5)
- Complaint registration system (93 wave 4 – 70 wave 5)
- Time taken to address the complaint (89 wave 4 – 68 wave 5)
- Outcome of the redressal system (87 wave 4 – 71 wave 5)

Government Transformation Index: The overall GTI for business is 81 in Wave 5 and 89 in wave 4. The main attributes that reduced the GTI in wave 5 include:

- Easiness of making a complaint (88 wave 4 – 70 wave 5)
- Feed-back regarding a complaint (86 wave 4 – 68 wave 5)
- Status tracking mechanism (84 wave 4 – 79 wave 5)

Additional Services: Respondents have provided their feedback on the services that they would like to see in the future. Some of these services include:

- Labour Law Hotline
- Social Insurance Services
- Ministry of Health – Hospital Appointments
- LMRA services through eGA portals.

Recommendations: Based on the findings, some of the main recommendations include:

- eGA should consider working out a strategy to increase the awareness on not just the key services but on the various services available with eGA.
- eGA should consider the possibility of tie-up with some recognised associations within the business community in order to promote its services by conducing workshops on the various initiatives carried out by eGA. Examples are:
  - The Bahrain chapter of the Institute if Chartered Accountants of India, which has 400 plus members who manage at least 1000 plus businesses
  - The Chartered Financial Analyst Association
  - The Bahrain Family Business Association
  - The Bahrain British Business forum
  - The Bahrain business incubator centre which has about 80 entities operating in the centre
  - The third party agent service providers especially for LMRA
  - Sub sector members of the BCCI
- eGA could also consider the possibility of introducing alternate payment options with banks
- Consider the possibility of enhancing some of the channels to enable the business customers to scan through the history records of the transactions made by them through eGA
- eGA can certify as eligible a pool of third part service providers who r engaged in providing

governmet liasion services to businesses. These third party service provedrs can be provided access to common service centers so that they may be able to use the common service centers.

Services and transaction experience

► Fix the shortcomings identified by the CSI attributes analysis in payment for Electricity and Water Authority, Renewal of Commercial Registration, Apply for eVisa.

► Introduce single sign on with secure and unique id with multiple passwords so that different department can use services related to their function

► Enabling users to create favourites or group services together in their log in home page so that every time they log in they can carry out all these transactions together.

► Enabling transaction log and payment history as applicable would probably increase the confidence and trust of the users as their will be a trail or log of th transaction available for future reference.

► Build trust in online transactions by assuring users of security features, additional validations and protection of privacy of information

► Work on legislation to enable digital signature recognition

► Consider introducing alerts through emails or mobile apps to end users on any of the services relevant to the users such as traffic contravention as and when it happens, EWA bill when it is issued, etc.

► Consider alternate payment options such as direct debit to bank accounts, prepayment options, etc. Explore cash collection through Kiosks, arrangements with banks for online banking transfers and introduction of eDinar services

► In addition to the annual award for usage introduce schemes similar to loyalty programs offered by retailers / airlines

► Introduce non-governmental transactions relevant to business such as payment of telephone bills, and information services such as event exhibitions ,etc

► Respond to user suggestions promptly and encourage more inputs from users

► Introduce web based training for both service providers and users

4.3 Key Findings: Government

4.3.1 Task Force

The Task Force questionnaire focussed on the following:

- ► The entity's service portfolio;
- ► The channels used by them to offer these services;
- ► If they offer eservices the role of eGA in transforming their service delivery;
- ► The level of satisfaction with the role of eGA and the services offered; and
- ► The challenges faced and the way forward.

The summary of findings are:

All surveyed entities have their own website and use it to communicate with their stakeholders	⬆
85% of the surveyed entities use eGA channels in addition to other delivery channels	⬆
The National Portal is the most preferred eGA delivery channel with 90% of the entities offering their services through the National Portal	⬆
The three main reasons for opting to provide services through eGA channels are: ► Recommended by EGA as part of the national strategy (71%) ► Providing more avenues for services (67%) ► Better image for the organisation (52%)	⬆
The rating of the process of implementing the eservices through EGA, there is greater acceptance of internal approvals, service documentation and process re-engineering but there are concerns as reflected in lower rating of efficiency levels(24% and 34%) for the components of technical infrastructure and speed of execution	⬇
The rating of the EGA's co-operation in transforming the services to EGA services, there is greater appreciation of the role played by EGA in initiation(product development), technical support in transformation, launching the service and effectiveness of service delivery but the rating of ongoing improvement through post implementation feedback on service delivery is low(10 to 15% consider it as partially efficient or not efficient and 29% are neutral) and that needs to be looked into by eGA	⬇
The challenges faced during enabling the eservices are compatibility of infrastructure platforms, accessibility to sensitive information and increased system vulnerability. In addition the other reasons cited were: ► Government employees were not ready for the change and did not receive proper awareness on the usage of eServices ► Resistance to Change ► The e-enabling team was not capable ► The entity was not willing to use the eService as there were charges proposed for e-payment related services	⬇

► The unique customization for the eServices ► Complexity of services	
29% of the respondents indicated existence of a service level agreement with eGA All respondents appear to be interacting with the eGA officials irrespective of whether services are being offered through eGovernment Channel or not. 52% of the total respondents interact with the eGovernment Authority officials on a need basis.	⬆
38% of the respondents indicated that problems were reported by customers mainly pertaining to system disruption and the entities escalate them to eGA to resolve those problems. 62% of the respondents believe that the eGA is efficient or highly efficient in providing assistance to resolve the problems and 57% believe that the eGA resolves the problems in a timely manner	⬆
In terms of the benefits of offering services through eGA, providing more avenues for services (57%), facilitate a better customer experience (48%) and better image for the organisation (48%) were the top 3 benefits as indicated by the respondents	⬆
The rating of the perception and benefits of eGovernment initiatives there is general agreement on factors such as convenience, cost saving and time saving but there is scope for expanding number of services offered through eGovernment channels and to simplify the process as still there is disagreement and reservations over the eGovernment initiatives being less complicated and meant to cater to all segments of the society.	⬇
Overall 43% of the respondents (75% of those who responded to this question) believe that there is improvement in service quality through eservices and only 14 % (25% of those who responded to this question) believe that the service quality has not improved,	⬆

The Key messages for eGA are:

There is greater acceptance of eGA and its role by the entities as is supported by the number of new services to be added to eGA services by the entities.

There is appreciation of the role played by eGA in assisting entities roll out their eservices and as well in resolving customer problems. There was a specific reference by EWA on the increase in the uptake through eGovernment channels for payment of electricity and water bill to around 11% of their total payments. In addition there were issues with respect to time lag in completion of transactions and there were customer complaints as even after they had paid through eGA channels the EWA call centre was following up on overdue payments. This issue has been resolved and there is a marked decrease in the customer complaints.

There is concern regarding the implementation time frame for new initiatives and with respect to follow up by eGA post implementation of eServices.

There are also challenges identified with respect to internal capacity and readiness to accept change by the entities.

Suggestions given by the Task Force are:

- ► Better linkages between various government entities to seamlessly offer complex services
- ► Enhance the search facility
- ► Better organize the information and services offered through the eGovernment Channels
- ► Allowing the user to carry out more than one transaction at the same time(single sign on)
- ► Work on legislation to enable digital signature recognition
- ► Enable payment log with history records
- ► Collaborate with government bodies to avail additional services

4.3.2 Government Employee

The Government employees questionnaire focused on understanding the employees perspective as the ultimate user of eGovernment services as well as their views on their role in service delivery similar to that of the task force

The summary of findings are:

On the awareness about eGovernment services for personal use:	
97% of the surveyed employees are aware of eGovernment services. Only 1 % of the government employees are not aware and they are incidentally all females National portal is the eGA channel that 74% of the government employees are aware of followed by the toll free number, mobile portal and Kiosks	⬆
Views on provision of eservices and the interaction with eGA:	
50% of the respondent had indicated that their organisation offered services through eGovernment channels	
19% of the total respondents(ie 38% of those who provide eservices) had indicated that complaints were received from customers. The main reasons for complaints were system breakdown, payment issues and inaccurate information in channel	⬇
50% of the total respondents rated the cooperation provided by eGA in resolving issues and 59% of them have rated eGA's cooperation in resolving issues as efficient or highly efficient	⬆
On the response time of eGA to enquiries 60% of the respondents have	⬆
89% of those who provide eservices acknowledge that there is improvement in service quality due to introduction of eservices	⬆

In terms of rating of the perception and benefits of eGovernment initiatives the government employ perception and benefits of eGovernment initiatives agree to most attributes except the following:
 	
    o   I was given all the necessary training to do my job within the new initiative
    o   My work becomes easier with the e-services initiative and
    o   The e-Government initiative is not complicated and can be used by the different profiles of the population
	⬇

The Government Transformation Index

- ► Computed based on 13 attributes (consolidated)   - 74%
- ► Computed based on 13 attributes (Task Force Only)   - 79%
- ► Computed based on 28 attributes (consolidated)   - 72%
- ► Computed based on 28 attributes (Task Force Only)   - 77%

Attributes which have affected the overall GTI with scores less than 60% are:

- ► Number of common service centres
- ► Number of trained officials to provide eservices
- ► Redressal of grievances within the defined service levels
- ► Feedback regarding a complaint

The Key messages for eGA are:

There is greater acceptance of eGA and its role by the government employees.

There is appreciation of the role played by eGA in assisting entities roll out their eservices and as well in resolving customer problems.

There are also challenges identified with respect to internal capacity and readiness to accept change by the entities.

Suggestions given by the employees are:

- ► Better linkages between various government entities to seamlessly offer complex services
- ► Reduction in steps (empowerment to reduce red tape as well as reengineering processes)
- ► Allowing the user to carry out more than one transaction at the same time (single sign on)

Summary of our recommendations

The major issues identified by both the task force and the employees revolve around capacity building, coordination between various government entities and speed in transformation of conventional to eservices. eGA could at a minimum consider the following:

- ► Establish a Fast response unit within EGA which offers turnkey solutions to assist government entities looking to e-enable their services
- ► Create awareness about the benefits of offering services through eGovernment channels amongst government employees. eGA should encourage ministries and government agencies to introduce eGA and its services as part of induction for all new recruits.
- ► In conjunction with BIPA eGA could design short term training courses targeted at task force and working group members on product development and enablement of services starting from the development of business case for every identified service, the check list of dos and donts in the transformation process and change management tools and techniques.
- ► Introduce web based learning for both service providers and users. The learning need not necessarily relate to eGA services.

4.4 Key Findings: Channels

4.4.1 Users Profile

4.4.1.1 By Age Group

The dominant age group of the respondents across the five channels is 26-35. The second dominant age group across all channels is 36-45 age group. The next emerging age group in the coming five years is 19-25. The eGovernment need to introduce services targeting this group.
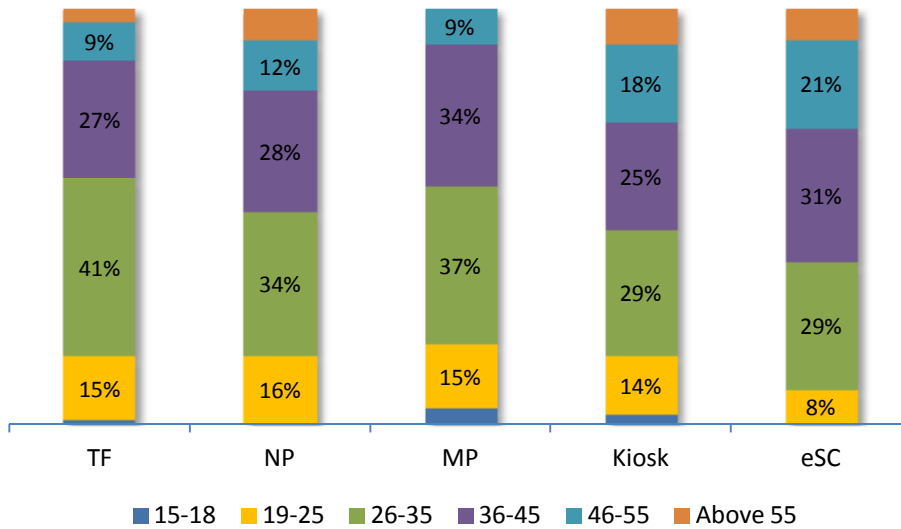
Wave 5: All respondents (NP-350, MP-200, TF-150, eSC-150, Kiosk-150)

4.4.1.2 By Nationality

Bahrainis continue to be the dominant channels users for eGA services followed by Arabs and Asians.
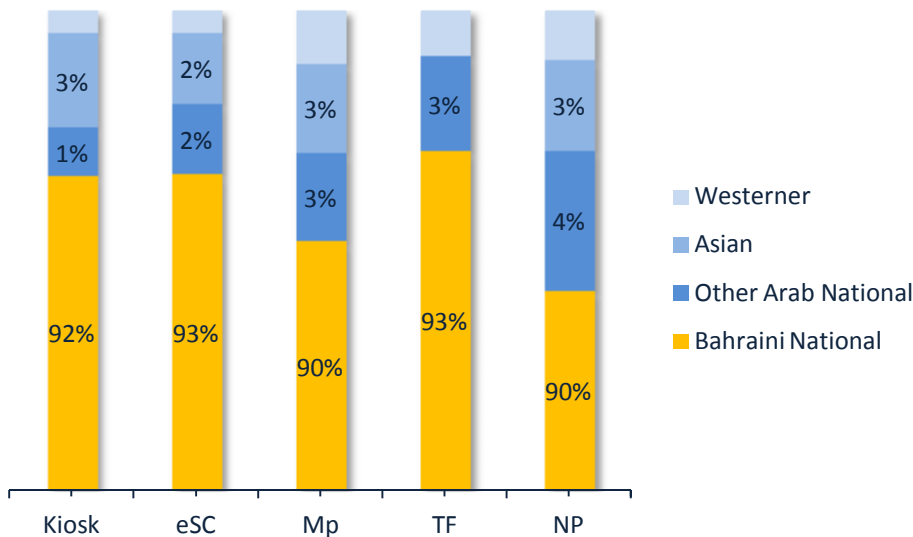
Wave 5: All respondents (NP-350, MP-200, TF-150, eSC-150, Kiosk-150)

4.4.2 Channel Satisfaction

#### 4.4.2.1   Overall Satisfaction

In general, surveyed channel users are mostly Extremely Satisfied or Satisfied with various eGA channels. With that said, Surveyed participants continue to demand improvements in overall channels performance (connectivity, services availed on channels and speed of transaction).
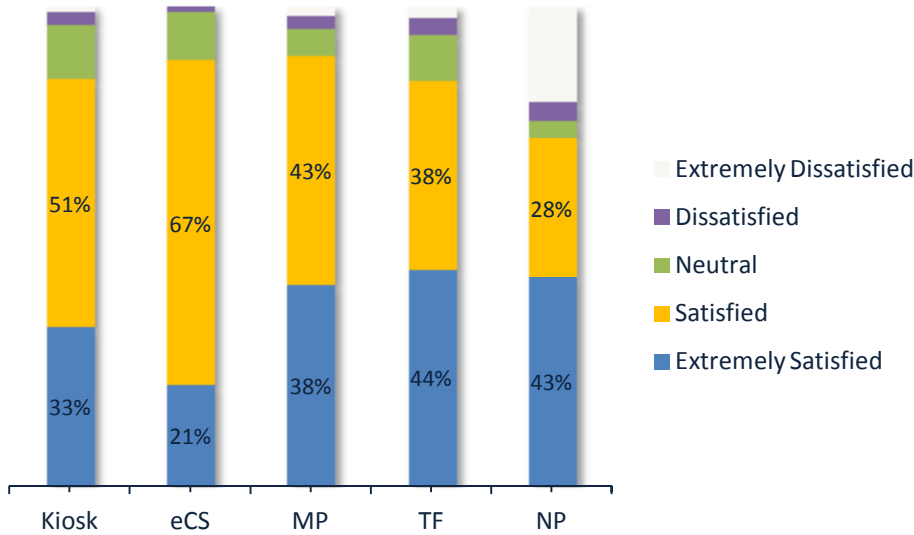
Wave 5: All respondents (NP-350, MP-200, TF-150, eSC-150, Kiosk-150)

4.4.2.2   Usefulness/ Necessary Channel

Among surveyed participants, 79% of eSC users perceive eSC as a necessary channel.
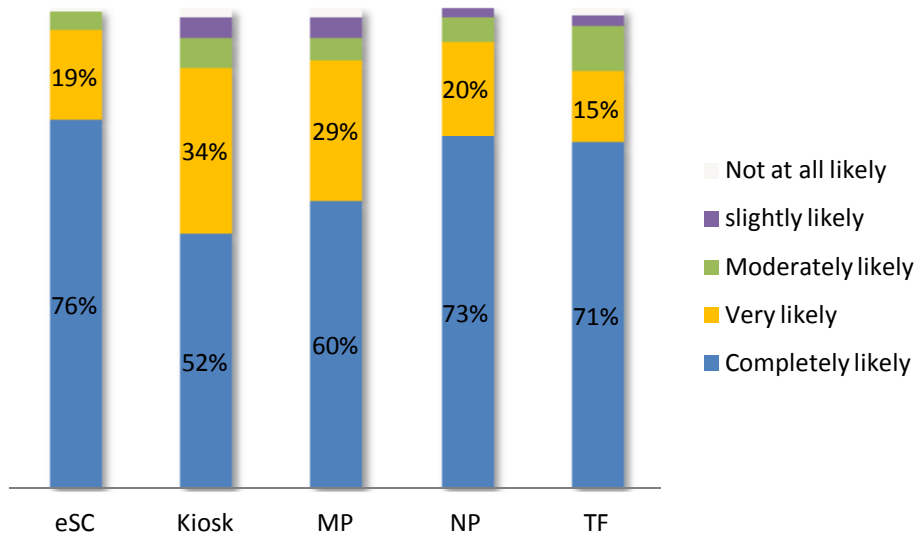
Wave 5: All respondents (NP-350, MP-200, TF-150, eSC-150, Kiosk-150)

4.4.3 Awareness

Billboards continue to be the most effective method to increase awareness as per the feedback received from the surveyed respondents. **Social circles** come in second regarding the same. The eGA should take that into consideration as they launch new marketing campaigns where effective messaging needs to be considered whilst using billboards.

Billboard is the most effective advertisement
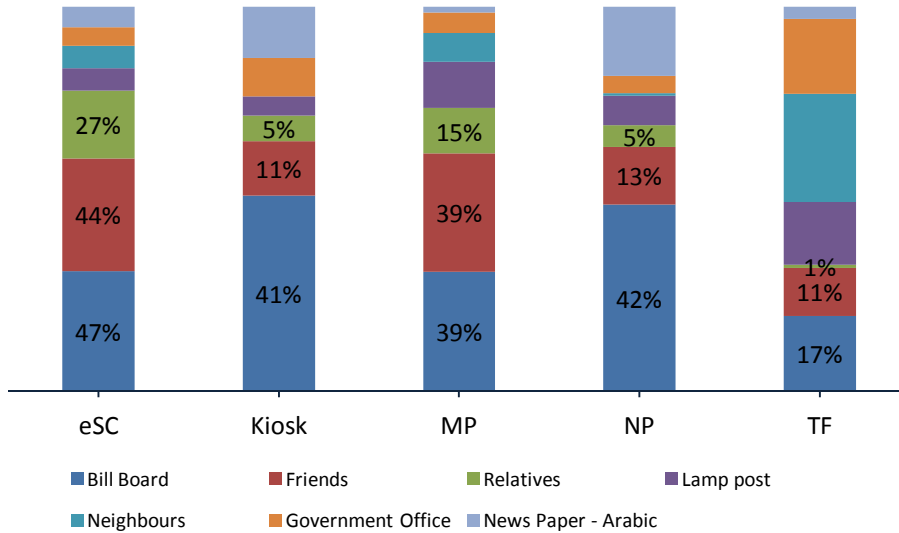
Wave 5: All respondents (NP-350, MP-200, TF-150, eSC-150, Kiosk-150)

4.4.4 Channel Usage

4.4.4.1 Nature of Activities:

The majority of surveyed participants use channels for **transaction** based activities followed by **general queries** and **follow ups**. The eGA need to continue investing in transaction based activities to attract more users.
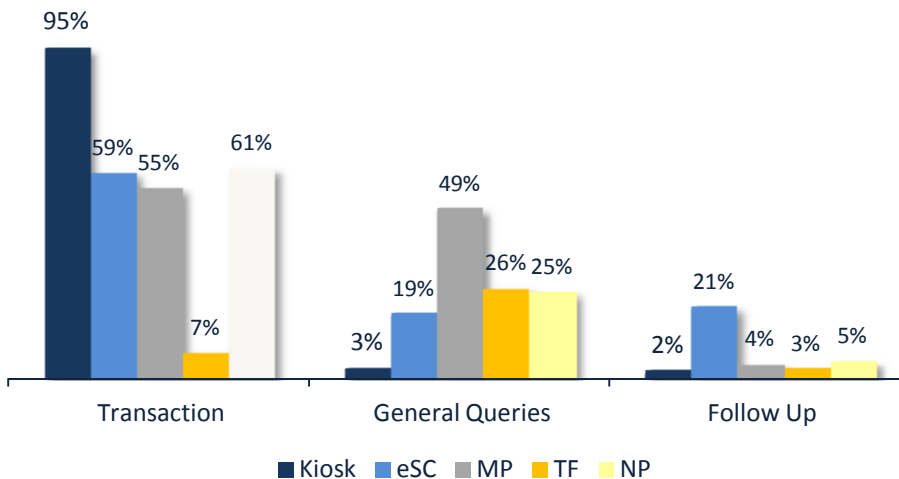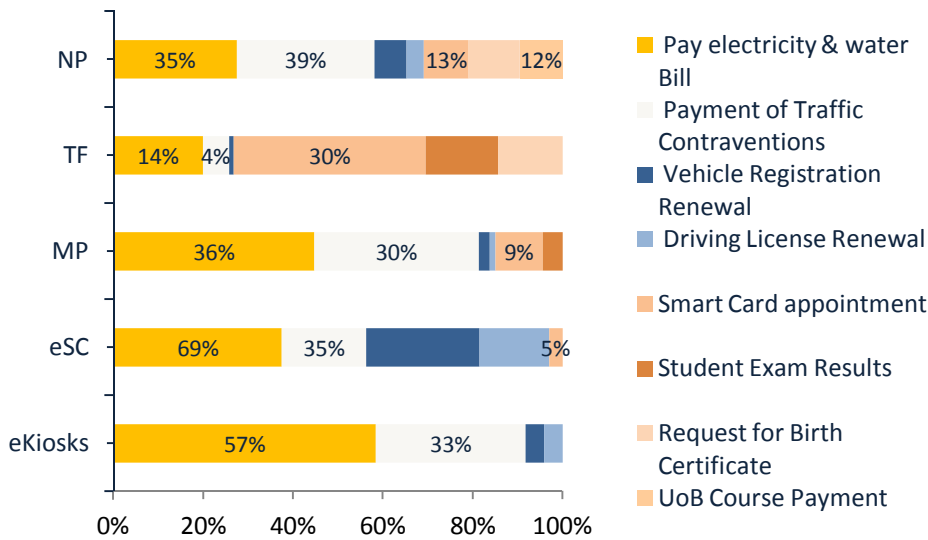

Wave 5: All respondents (NP-350, MP-200, TF-150, eSC-150, Kiosk-150)

4.4.4.2 Nature of Service Availed

Payment of EWA continues to be the most availed services across all eGA channels. Payment of Traffic Contraventions is second in line. In general, the demand for Transaction (payment) based services across

all channels is higher than Informational (non-payment) as a result, eGA needs to focus on offering transaction based services (payment) versus information services (non-payment based services).

Wave 5: All respondents (NP-350, MP-200, TF-150, eSC-150, Kiosk-150)

4.4.5 Proposed Additional Services

National Portal (NP)

Transactional

- ► Extend registration renewal for new vehicle under manufacturing warranty for up to 5 years.
- ► Enabling online registration and admission for additional universities (private) and training institutes.
- ► Enable passport related services such as request renewal of new passports and request issuance of passports for newly born citizens.
- ► Payment of telephone / mobile bills.
- ► Flexibility in amount payment related to electricity & water bill.
- ► Avail LMRA related service through NP.
- ► Purchased of airline tickets for national carriers.
- ► Renewal of insurance policies using NP.
- ► Payment of Zakat via NP.
- ► Purchase of Movie Theatres tickets.
- ► Purchased of national events (F1, Spring of Culture, ... others) via NP.
- ► Hotel booking (in Bahrain).
- ► Taxi/ Limo service booking.
- ► Pay postal box rental.
- ► Registering new employees at Social insurance.
- ► Check Benefit related transactions.

Informational:

- ► Avail social related services (pension) through NP.
- ► Providing search engine tool in the main page of the NP.
- ► Enable booking GIS via NP.
- ► Enable booking Heath Centres appointment for non employment related purposes.
- ► Interaction by parents with relevant school teachers regarding their children's education.
- ► Airplane check-in.
- ► Restaurants reservation.
- ► Online job centre including opportunities.
- ► Report violations related to consumer & consumer pricing.
- ► Targeting expats/ residence provide information on property rental prices per governorate.
- ► Collaborate with realtor and post available rentals across Bahrain.
- ► Reservation of camping site location.
- ► Provide currency exchange rate information.

Mobile Portal (MP)

Transactional:

- Payment of telephone and mobile bills through MP.
- Passport renewal.
- Hospital appointments.
- Include Social Insurance related services.
- Additional services available on NP but not enabled on MP.
- Flexibility in amount payment related to electricity & water bill.
- Avail LMRA related service through MP.
- Purchased of airline tickets for national carriers.
- Renewal of insurance policies using MP.
- Payment of Zakat via MP.
- Purchased of national events (F1, Spring of Culture, ... others) via MP.
- Hotel booking (in Bahrain).
- Taxi/ Limo service booking.
- Purchase of Movie Theatres tickets.

Informational:

- Provide information related to Bahrain: Demography, history, laws, rules and regulations
- Entertainment: Exhibitions, events, festivals
- Tourism: Visa requirements, Hotels / Accommodation search, important telephone numbers
- Avail social related services (pension) through MP.
- Enable booking Heath Centres appointment for non employment related purposes.
- Airplane check-in.
- Restaurants reservation.
- Targeting expats/ residence provide information on property rental prices per governorate.
- Collaborate with realtor and post available rentals across Bahrain.
- Reservation of camping site location.
- Others: Housing request follow up, employment vacancy

eServices Center (eSC)

Transactional:

- Extend registration renewal for new vehicle under manufacturing warranty for up to 5 years.
- Enable passport related services such as request renewal of new passports and request issuance of passports for newly born citizens.
- Payment of telephone / mobile bills.
- Flexibility in amount payment related to electricity & water bill.
- Avail LMRA related service through eSC.
- Purchased of airline tickets for national carrier.
- Renewal of insurance policies using eSC.
- Payment of Zakat via eSC.
- Purchase of Movie Theatres tickets.
- Purchased of national events (F1, Spring of Culture, ... others) via eSC.
- Hotel booking (in Bahrain).
- Taxi/ Limo service booking.
    - Pay postal box rental.
    - Registering new employees at Social insurance.
    - Check Benefit related transactions.

Informational:

- Avail social related services (pension) through eSC.
- Enable booking Heath Centres appointment for non employment related purposes.
- Flight check-in.
- Restaurants reservation.
- Report violations related to consumer & consumer pricing.
- Targeting expats/ residence provide information on property rental prices per governorate.
- Collaborate with realtor and post available rentals across Bahrain.
    - Reservation of camping site location.
    - Provide currency exchange rate information.
- Provide news headlines.

eKiosks

Transactional:

- Extend registration renewal for new vehicle under manufacturing warranty for up to 5 years.
- Enable passport related services such as request renewal of new passports and request issuance of passports for newly born citizens.
- Payment of telephone / mobile bills.
- Flexibility in amount payment related to electricity & water bill.
- Avail LMRA related service through Kiosk.
- Purchased of airline tickets for national carrier.
- Renewal of insurance policies using Kiosk.
- Payment of Zakat via Kiosk.
- Purchase of Movie Theatres tickets.
- Purchased of national events (F1, Spring of Culture,... others) via Kiosk.
- Hotel booking (in Bahrain).
- Taxi/ Limo service booking.
    - Pay postal box rental.
    - Registering new employees at Social insurance.
    - Check Benefit related transactions.

Informational:

- Avail social related services (pension) through Kiosk.
- Enable booking Heath Centers appointment for non employment related purposes.
- Flight check-in.
- Restaurants reservation.
- Report violations related to consumer & consumer pricing.
- Targeting expats/ residence provide information on property rental prices per governorate.
- Collaborate with realtor and post available rentals across Bahrain.
    - Reservation of camping site location.
    - Provide currency exchange rate information.
- Provide news headlines.

Customer Service Center (Toll Free (TF)

Transactional:

- Payment Transactions
    - Payment of telephone and mobile bills
- Others
    - Hospital appointments
- Enable passport related services such as request renewal of new passports and request issuance of passports for newly born citizens.
- Flexibility in amount payment related to electricity & water bill.
- Avail LMRA related service through eSC.
- Purchased of airline tickets for national carrier.
- Renewal of insurance policies using eSC.
- Payment of Zakat via eSC.
- Purchase of Movie Theatres tickets.
- Purchased of national events (F1, Spring of Culture, ... others) via NP.
- Hotel booking (in Bahrain).
- Taxi/ Limo service booking.
- Pay postal box rental.
- Registering new employees at Social insurance.
- **Check Benefit related transactions.**

Informational:

- Avail social related services (pension) through eSC.
- Enable booking Heath Centres appointment for non employment related purposes.
- Airplane check-in.
- Provide information related to
    - Driving license expiry reminder
    - Passport renewal
    - Smart card expiry information
- Restaurants reservation.
- Report violations related to consumer & consumer pricing.
- Targeting expats/ residence provide information on property rental prices per governorate.

4.4.6 Suggestions for Improvement

eChannel	Infrastructure, Support & Connectivity:	Awareness:

National Portal (NP)	► Improve the aesthetics of the NP through items such as;
	  o Good Visual Design;
	  o Thoughtful User Interface;
	  o Meaningful Content;
	  o Search, Sitemap;
	  o Consider the possibility of reducing the steps in carrying out a transaction
	  o Cross Browser Compatibility;
	  o Web Optimized Images; and
	  o Language Capabilities for non Arabic/English speakers.
	► Enhance performance and connectivity speed.
	► Invest in National Portal Single Sign on including;
	  o Account creation with password protection
	  o Enable adding services to the account.
	  o One stop shop for all services.
	  o Enable payment log with history records to enable users to view their past transaction records.
	► Work on legislation to enable digital signature recognition.
	► Explore introduction of eDinar services.
		► Launch awareness campaign to reconfirm security robustness of the eGA's NP.
		► Incentivize business & individual to use eGA services
		► Invest training targeting upcoming youth segment on eGA Services

| Mobile Portal | ▶ Mobile Applications:
  o More services to be made available through mobile applications.
  o Provide with applications that are model independent (not specific to iPhone alone).
  o Introduce single sign on capability for MP.
▶ Portal Aesthetics and readability:
  o Provide an organised and categorised display of information and reduce cluttered information.
▶ Portal Performance:
  o Reduce the down time of the MP.
  o Increase the speed of carrying out transactions through MP.
  o Reduce the number of steps required to complete a transaction.
  o Make arrangement with the internet service providers to improve the connectivity performance.
▶ Others
  o Introduce usage of prepaid cards for making payments through eGA channels
  o Work on legislation to enable digital signature recognition.
  o Explore introduction of eDinar services. | ▶ Launch awareness campaign to reconfirm security robustness of the eGA's MP.
▶ Incentivize business & individual to use eGA services
▶ Invest training targeting upcoming youth segment on eGA Services |
| eServices Centre (eSC) | ▶ eSC premises:
  o Provide more spacious and adequate parking spaces for the customers
▶ eSC employees:
  o Increase the number of employees in the eSC centers in certain location as currently there is inadequacy of staff in the eSC in some locations.
  o Improve the staff knowledge on the services offered to enable them to communicate to clearly and accurately communicate the same to the customer.
  o Improve staff's professionalism and courtesy approach with customers.
▶ eSC Performance:
  o Reduce the time taken to respond to customers and complete the transaction.
▶ Enable additional language support.
▶ Explore introduction of cash payment.
▶ Ensure adequate catering for special needs customers, i.e. easy accessible machines. | ▶ The staff should be able to market the services offered in eSC to the common people living in the near vicinity
▶ Launch awareness campaign to reconfirm security robustness of the eGA's channels.
▶ Incentivize business & individual to use eGA channels. |

| eKiosk | ► Kiosk Aesthetics and Readability:
  o The kiosk machine should be made more convenient.
  o Increase the connectivity speed.
  o Improve the touch screen sensitivity
  o Organise and categorise the information in a logical manner.
  o Improve the font size and colour.
  o Increase the number of Kiosks in various locations
    ▪ Malls
    ▪ Hospitals
    ▪ Ministries
    ▪ Banks
► Reduce the time taken to complete the transaction.
  o Enable additional language support.
  o Explore introduction of cash payment.
  o Ensure adequate catering for special needs customers, i.e. easy accessible machines. | ► Launch awareness campaign to reconfirm security robustness of the eGA's channels.
► Incentivize business & individual to use eGA channels. |
| Customer Service Center/ Toll Free (CSC) | ► Improve the response time to answer a call
► Reduce the time taken to complete the transactions
► Consider the possibility of introducing the TF service 24/7 | ► Create more public awareness about TF services
► Awareness on Security
► Increase the awareness on the security of the transactions carried out through TF channels |