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Transformation, digitisation & happiness:

Public opinion on government services in Saudi Arabia

2021

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The ambition for service transformation is clear in Saudi Arabia, and this research shows the appetite for change exists in equal measure.

Whether it can be done is another question.

Covid-19 and a depression in oil revenues – which pre-dated the pandemic – alongside demographic changes, and the increasing expectations of citizens and residents have been driving change in how government services are delivered in Saudi Arabia.

Alongside these more immediate factors, for almost two decades, the Saudi Arabian Government has been in the process of increasing digital access to services.

This process of moving access to government services online is accelerating thanks to initiatives relating to the Government's flagship strategic reform programme, *Vision 2030*.

But are these changes satisfying service users? And how do the people that use them want to see these services transform further?

Our ground-breaking survey of Saudi Arabian residents and citizens looks at these questions and more as we establish how the Government's transformation programme is going in the eyes of those that use the services, and whether they are on the right track going forward.

It's clear from our research that citizens and residents are generally happy with the delivery of government services, but also note a few areas for improvement. In particular, service users want simpler, faster and more personalised experiences – issues which may well be solved by creating greater digital access.

We also find that the relationship between the happiness of citizens and residents, as well as their trust in services, is exceptionally fragile. Just a single poor experience could see service users lose trust in the programme of transformation and impact their 'happiness' more broadly. This only goes to underline the importance of ensuring the careful and effective management of the process of transformation.

The ambition for service transformation is clear in Saudi Arabia, and this research shows the appetite for change exists in equal measure. Whether it can be done is another question. But led by service user insights and a significant financial commitment, there is no reason why Saudi Arabia can't succeed in delivering world-leading government services, regardless of whether they are accessed online or in-person.

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How does the happiness of citizens and residents relate to the quality of government services?

Our survey found a clear correlation between the two.

Executive summary

Our first-of-a-kind national survey on government services found that citizens and residents in Saudi Arabia are remarkably 'happy' with the delivery of government services. 84% of respondents described themselves as being 'very happy' or 'somewhat happy' with the government services they have used in the past two years. In particular, services accessible digitally were seen as being delivered effectively. Perhaps it is unsurprising therefore that respondents also indicated support for the further 'digitisation' of services.

That said, our survey also found that a significant number of citizens and residents found government services could be complicated, slow and lacking personalisation. Enhanced digital access may solve some of these issues; however, this needs to be done based on an understanding of service user experience. Furthermore, a number of service users indicated that they will continue to access government service through in-person or telephone-based platforms – highlighting the importance of retaining quality in government services across all access platforms.

Most crucially our survey found that the 'trust' of service users is particularly fragile. The majority (59%) of people surveyed said a single bad experience impacts their 'trust' in government services in general. If the process of transformation government services are currently going through in Saudi Arabia is not carried out effectively, the Government could not only face significant financial costs, but a general lack of support in its programme of service change. It is crucial, therefore, that the reform of government services is managed carefully, ensuring that changes are made only when there is a high degree of confidence in the user experience of new platforms.

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The past twelve months have been turbulent for governments and citizens globally, and the services public authorities provide have been under pressure like never before.

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▌▌ │ │ ▌ Introduction

Context

What do citizens want when it comes to government services?

Through a nation-wide survey, this ground-breaking report explores what residents of the Kingdom of Saudi Arabia (KSA) think when it comes to the government services they use and how they want to see them change. 509 KSA residents were surveyed, cutting across different nationalities, professions, and age groups.
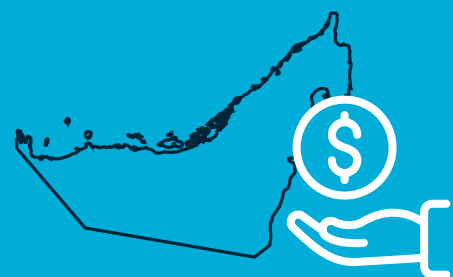
The past twelve months have been turbulent for governments and citizens globally, and the services public authorities provide have been under pressure like never before. The Covid-19 pandemic has led to a rapid change in how people interact with government services. This transformation sits alongside the long-term drivers of change which are pushing KSA government services into a new phase of development and delivery.

As government services are reshaped, it is crucial that policy makers have an understanding of the current thinking and sentiments of those that use them. This research creates a baseline from which those designing public services can better understand and form the future. Furthermore, this paper outlines a series of distinct policy recommendations that will help ensure KSA remains at the cutting edge of delivery, citizen satisfaction and innovation in government services.

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Socio economic snapshot

GDP

KSA is a high-income country and the economic powerhouse of the Middle East with a GDP of USD $793 billion [1].

38%
International migrant workers

Nationalities

KSA has a population of about 35 million people [2], around 38% of which are international migrants [3]. Syrians make up almost a quarter of international migrants, with Indians, Pakistanis and Egyptians also featuring prominently in this group. KSA has the lowest percentage of migrant workers among all Gulf states.

42%
58%

Gender & age

Most migrant workers tend to be male, which has a meaningful effect on the country's gender balance which is 58% male and 42% female [4]. The median age in the KSA is 32, which is slightly older than the global average, but is explained by the large preponderance of working age males aged between 25 and 54, a significant percentage of which are international migrants [2].
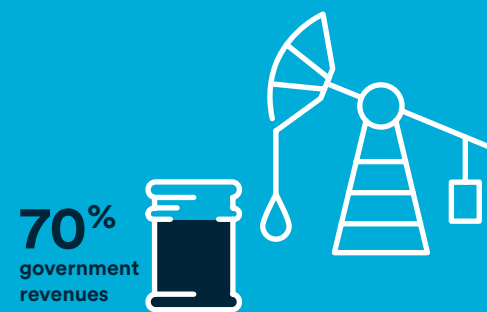
70%
government revenues

Economy

KSA has the largest oil reserves in the world, which make up 80% of exports and 70% of government revenues [5]. The industrial sector, which is dominated by oil drilling, is 47% of GDP and employs a quarter of the workforce [5]. The share of the industrial sector outside of oil production has been increasing due to the Government's economic diversification efforts.

Services - predominantly made up of tourism, finance, and insurance - represent just over 50% of KSA GDP and employ 73% of the workforce [5]. Tourism is a significant revenue generator, with around 4 million tourists visiting each year principally because of the Hajj to Mecca and Medina.

Drivers for change

The pace of change in how public services are delivered has accelerated across the world. Citizens expect more for less. Spurred on by a more interconnected world, increasing living standards, growing populations, technological change, and private sector innovation, the way governments deliver services and how users interact with them is in flux.

The Covid-19 Pandemic has further hastened the pace of change in public service provision. Around the world, social distancing measures have required governments to innovate when it comes to the services they deliver.

As the largest oil producer in the world, the Kingdom is susceptible to declines in the oil price. Before the pandemic struck, global oil prices were already low, to the extent OPEC cut production in 2019. KSA's oil production capacity was further inhibited due to drone attacks on refinery facilities.

This challenging economic environment has also been exacerbated considerably by Covid-19, which has reduced global demand for oil, alongside depressing revenues from tourism.

These near-term challenges should not be underestimated. However, there are grounds for cautious optimism on account of Crown Prince Mohammed bin Salman's ambitious *Vision 2030* plan, first announced in 2016.

The two main pillars of the Vision are:
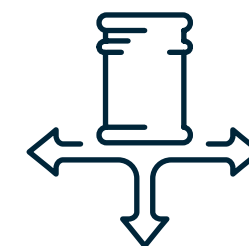
A diversified economy less dependent on oil.

Transforming the Kingdom into a global hub of transportation between the three continents of Europe, Africa and Asia.

[1] The World Bank, "Saudi Arabia - Data," 7 February 2021. [Online]. Available: https://data.worldbank.org/country/SA.

[2] Worldometers, "Saudi Arabia Population (LIVE)," 7 February 2021. [Online]. Available: https://www.worldometers.info/world-population/saudi-arabia-population/.

[3] CIA , "World Factbook - Saudi Arabia," 28 January 2021. [Online]. Available: https://www.cia.gov/the-world-factbook/countries/saudi-arabia/.

[4] World Bank, "Population, female (% of total population) - Saudi Arabia," July 2020. [Online]. Available: https://data.worldbank.org/indicator/SP.POP.TOTL.FE.ZS?locations=SA.

[5] Nordea, "Saudi Arabia: Economic and Political Overview," 6 January 2021. [Online]. Available: https://www.nordeatrade.com/fi/explore-new-market/saudi-arabia/economical-context.

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The planned metropolis of Neom will be a physical manifestation of the ambition behind *Vision 2030*. Located in Northwest Saudi Arabia on the Red Sea - through which 13% of the world's trade flows - Neom will be within four hours of 40% of the world's population [6]. Neom will include towns and cities, ports, enterprise zones, sports and entertainment venues, and tourist destinations, a "living laboratory and hub for innovation" [6].

As part of *Vision 2030* the Government has also established labour market initiatives to support the reduction of unemployment from the current 12% to 10.5% by 2022. An important part of this is to increase labour force participation amongst women. These valuable reforms will have a multitude of advantages, one of which will be increasing independence among the working age population and, in so doing, reducing reliance on government services.

Despite the outlined challenges, economic forecasts suggest that GDP growth could reach almost 3% in 2021, up from -5.4% in 2020 [7]. Of course, the prospects for oil are inevitably at the behest of global markets and a further decline could compromise funds available for government service transformation. However, given the scale of the commitment to achieving *Vision 2030*, principally though the country's vast $325bn *Public Investment Fund* [8], a further drop in oil prices may not compromise the country's exchequer to the extent it would for other nations.

▮▮ | ▮ Key finding 1

Happiness, trust and transformation:
Good government services equals happy citizens

The 19,000-person *Global Happiness Survey 2020* found Saudi Arabia to be the third happiest country in the world – with 80% of people saying that they were 'happy' [9]. But how does the happiness of citizens and residents relate to the quality of government services?

Our survey found a clear correlation between the two, with **80% of people saying that the experience they have with government services impacts their overall happiness.**

[6]   Neom , "Neom - About," 7 August 2019. [Online]. Available: https://www.neom.com/en-us/about/#facts.

[7]   KPMG, "Saudi Brief - Key Economic Indicators," February 2020. [Online]. Available: https://assets.kpmg/content/dam/kpmg/sa/pdf/2020/saudi-brief-key-economic-indicators.pdf

[8]   A. England and A. Massoudi, "'Never waste a crisis': inside Saudi Arabia's shopping spree," Financial Times, 25 May 2020. [Online]. Available: https://www.ft.com/content/af2deefd-2234-4e54-a08a-8dbb205f5378.

[9]   Ipsos, "The state of happiness in a COVID world," 7 October 2020. [Online]. Available: https://www.ipsos.com/en/global-happiness-study-2020.

Perhaps even more strikingly, an impressive 84% of respondents described themselves as being 'very happy' or 'somewhat happy' with the government services they have used in the past two years.

84%

'very happy' or 'somewhat happy'

with the government services they have used in the past two years.

This says much for the quality and consistency of government services in KSA. With services already undergoing transformation as part of *Vision 2030*, this level of satisfaction is a strong foundation from which the Government can continue to develop its offering. It also means, however, that expectations are high. Citizens and residents will expect services to remain at a certain standard as they transform.
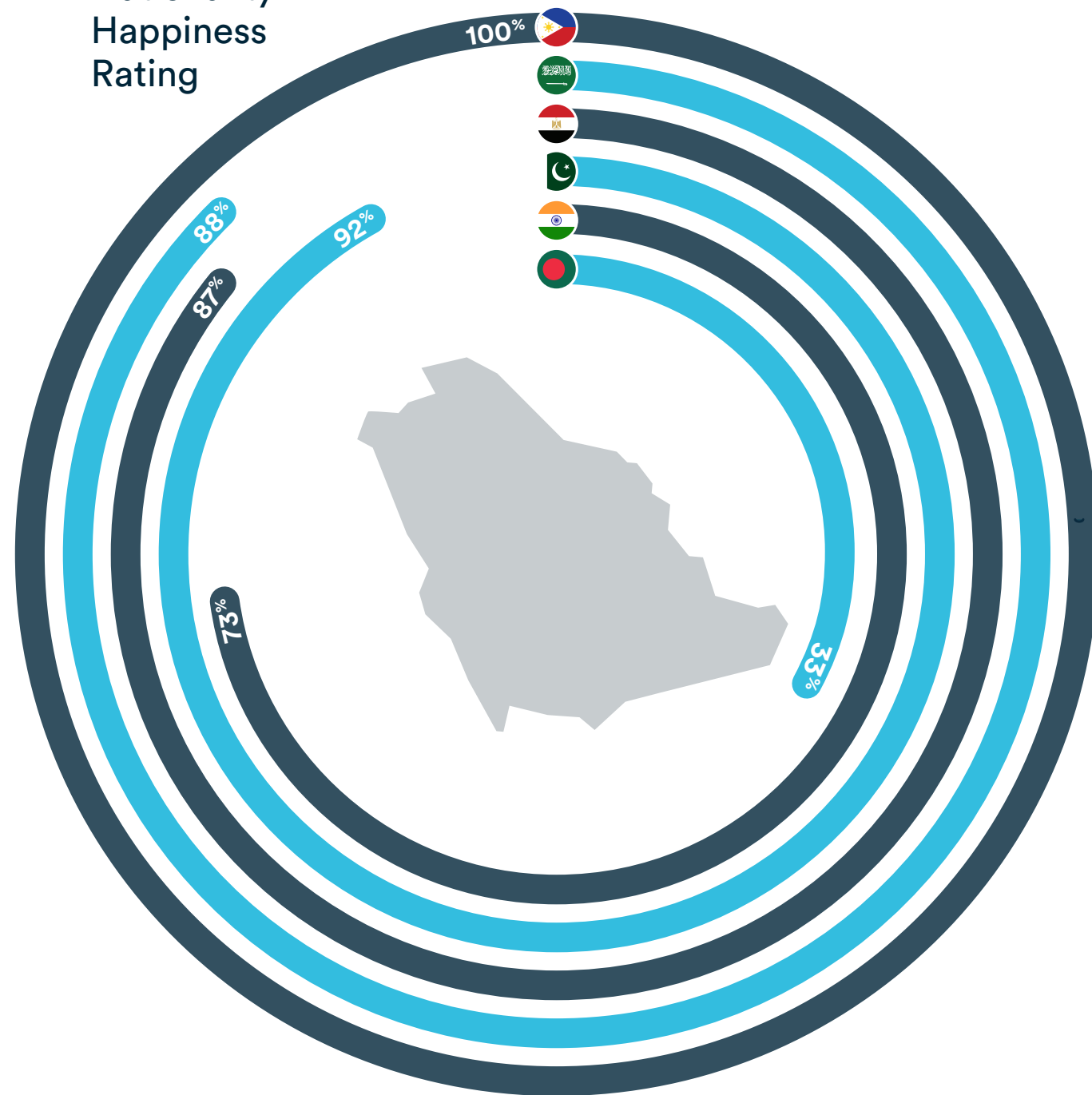
When considering user-experience, it is critical that government and its partners do not consider digital services in a vacuum.

Rather, they should aim to replicate the very best of digital services offered by the private sector.

Nationality Happiness Rating

100%

92%

88%

87%

73%

33%

Nationality

The 84% happiness figure is based on a significant range of responses and can be broken down by nationality. Just 33% of Bangladeshis reported they were 'somewhat happy' with government services; none at all were 'very happy'. However, this demographic consisted of just three respondents.

The highest levels of satisfaction were recorded from Filipinos, 100% of whom reported they are happy with government services. Most tellingly, the six largest cohorts surveyed – Saudis, Egyptians, 'other'*, Pakistanis, Filipinos, and Indians – each reported a happiness level of over 70%, with **the top four cohorts – Saudis, Egyptians, 'other', and Pakistanis – all reporting a happiness level of 87% or more.**

This suggests that the majority of users are content with government services.

*'Other' includes all nationalities that were not explicitly listed in the survey

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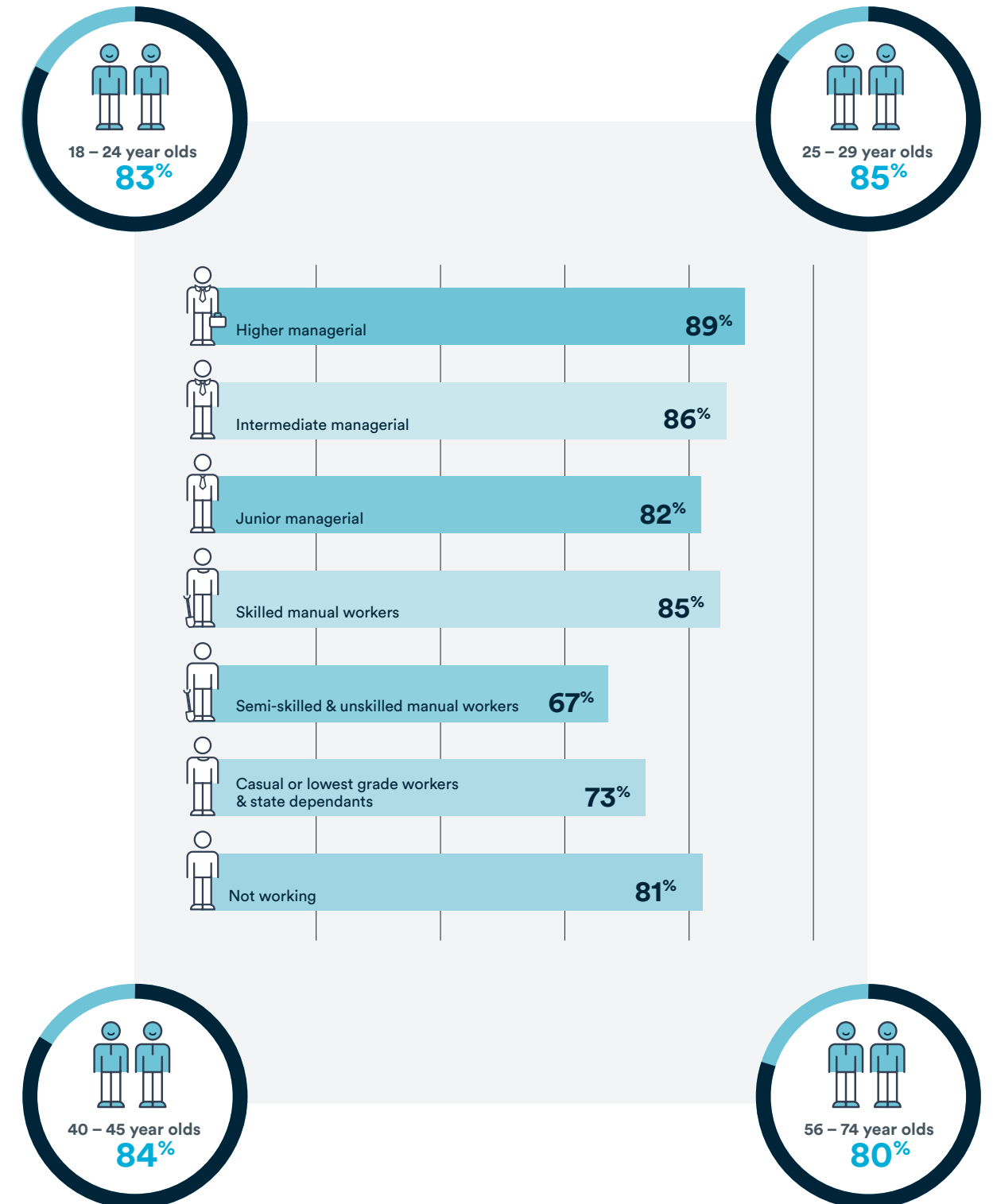Serco Institute | ExperienceLab

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Professional status & age

Although happiness with government services tends to increase in-line with a person's professional status, there are still impressive levels of happiness across most cohorts. **Six of the seven professional status groups reported happiness with government services of over 70%, with five at more than 80%.**

The only group below the 70% mark was 'semi-skilled and unskilled manual workers' of whom 67% reported they were happy with government services.

The lower levels of happiness of this group could relate to the fact that it contains a significant number of migrant workers who require more tailored information on how best to access government services – for example, they may face language barriers.

Analysis of the data as it relates to different age groups shows that happiness with government services is broadly consistent across age groups. Indeed, all age cohorts responded with high levels of happiness: 83% of 18 – 24-year olds were happy, with 85% for 25 – 29-year olds, 84% for 40 – 45-year olds, and 80% for 56 – 74-year olds.

18 – 24 year olds
83%

25 – 29 year olds
85%

Higher managerial	**89%**
Intermediate managerial	**86%**
Junior managerial	**82%**
Skilled manual workers	**85%**
Semi-skilled & unskilled manual workers	**67%**
Casual or lowest grade workers & state dependants	**73%**
Not working	**81%**

40 – 45 year olds
84%

56 – 74 year olds
80%

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Trust & expectations

Another key finding from the data concerns 'trust'. **Over 59% of people said that they 'strongly' or 'somewhat agreed' that 'a negative experience with one service impacts their trust in government services overall'.**

This emphasises the importance of each interaction between service users and government – service reforms will need to be managed with great care to ensure that citizens and residents don't lose faith in services as they change.

This is especially relevant when it comes to extending digital access to government services. If people who prefer accessing services through traditional, in-person channels feel that digital access does not offer the same level of quality, these groups may lose trust in the government's offering and its wider transformation agenda.

>59%

said that they 'strongly' or 'somewhat agreed' that 'a negative experience with one service impacts their trust in government services overall'.
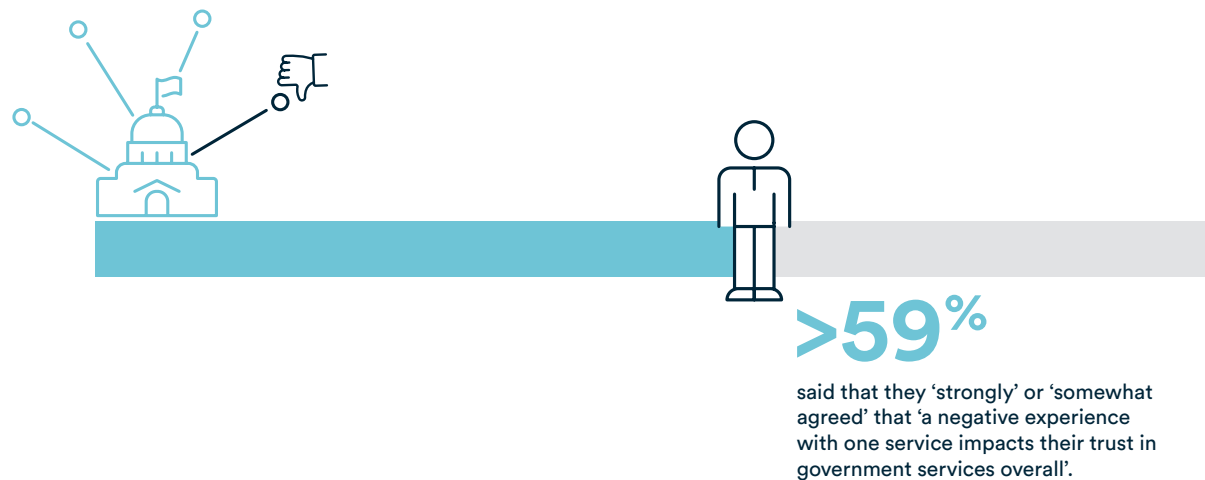
❘ Key finding 2

Digitising government services

The past, present and future of service delivery

Saudi Arabia has been at the forefront of delivering digital access to government services for some time. The *Absher* platforms demonstrate the development of the Saudi Arabian Government's digital service offering. Reportedly with over 19 million users, the *Absher* online platform, and *Android* and *Apple IOS* apps, allow access to over 279 government services online [10]. A companion application, *Absher Business*, is also available and provides a range of government services to the private sector and has reportedly supported 7.7million transactions, serving more than 6 million organisations [11].

The development of the *'Unified National Platform for all Government Services'* through *gov.sa* is one of the latest steps in increasing access to services digitally. The initiative is aiming to bring together access to all possible government services through a searchable, online web-based platform with the hope of it becoming the "world standard for unified government services" [12].

This digitisation of services aligns with attempts by governments around the world to deliver amenities to citizens online. Germany, for example, has through their Online Access Act (Onlinezugangsgesetz) committed to all public services being accessible via a digital channel by the end of 2022 [13]. In Estonia, 99% of public services are already accessible online [14].

[10] Absher, "Service Guide 2021," February 2021. [Online]. Available: https://www.absher.sa/wps/wcm/connect/individuals/79bfef4c-5b06-48b8-b60c-787e428657ef/book1_update-V12_en.pdf?MOD=AJPERES&CONVERT_TO=url&CACHEID=ROOTWORKSPACE.Z18_GPHIG0G0L0FK50QCOI6VQT2EH779bfef4c-5b06-48b8-b60c-787e428657ef-nv3fT75

[11] Absher Business, "Service Guide 2021," February 2021. [Online]. Available: https://www.absher.sa/wps/wcm/connect/business/afd5e859-82e7-440b-b8c5-8894b040d988/book1_Bus-V6_en.pdf?MOD=AJPERES&CONVERT_TO=url&CACHEID=ROOTWORKSPACE.Z18_G11AH2G0LGFID0ARKN3A0G2826-afd5e859-82e7-440b-b8c5-8894b040d988-nv3gmCN

[12] gov.sa, "About National Platform GOV.SA," 24 November 2020. [Online]. Available: https://www.my.gov.sa/wps/portal/snp/aboutPortal/!ut/p/z0/04_Sj9CPykssy0xPLMnMz0vMAfIjo8zivQIsTAwdDQz9_d29TAwCnQtDjUy9wgwMLEz1g1Pz9AuyHRUBI89e_A!!/

[13] The Federal Government of Germany: Ministry of the Interior, "The Implementation of the Online Access Act," [Online]. Available: https://www.onlinezugangsgesetz.de/Webs/OZG/EN/ozg/ozg-node.html;jsessionid=16040DBDAEE1F18C416CB65039304D74.2_cid364

[14] e-Estonia, "e-Governance," [Online]. Available: https://e-estonia.com/solutions/e-governance/

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In our survey, digital platforms consistently scored higher when it came to user-satisfaction than in-person or telephone-based platforms

Visiting a customer happiness centre in person — 11%, 20%, 69%

Kiosks — 12%, 26%, 62%

Calling a call centre — 12%, 18%, 70%

Digital service accessed through a website — 6%, 16%, 78%

Digital service accessed through a mobile phone or tablet app — 5%, 15%, 80%

KEY
- Positive – Excellent / Good
- Neutral – Variable
- Negative – Prefer not to use / Avoid

Those who were 'very happy' with government services in general also indicated a high-level of preference and/or comfort in accessing them digitally. 65% of people who said they were 'very happy' with government services said that they access them digitally wherever possible.

This indicates two potential relationships – firstly, that those who access public services online are happy with the service they receive; secondly, the people who use digital platforms instead of other means of accessing services feel as if they get better outcomes and are 'happier' with government services overall.

Alongside meeting citizen and resident demand, governments and service users could also see a range of further benefits through the digitisation of services, including:

Cost

Significant cost reductions can be made through the digitisation of government services. However, if executed poorly, quite the opposite - financial costs, alongside customer satisfaction can be hugely impacted (discussed further in Key Findings 3).

Accessibility

Online services are available to citizens 24/7, regardless of geography or large-scale physical infrastructure. They also allow easier access to services in a range of languages. Considering the diversity of KSA, this should also be considered a significant benefit. Of course, individuals need to have a device that is able to access digital services; however, 97% of KSA citizens have access to a smartphone at work or at home [15].
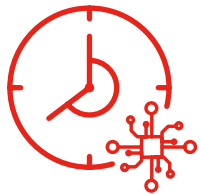
Efficiency

Significant efficiency and productivity gains can be made by the digitisation of services. Estonia estimates the reduced bureaucracy has saved 844 years of working time annually [14]. The efficiency and productivity gains made by digitisation are likely to be further enhanced by continuing advancements in automation and AI.

[14]   e-Estonia, "e-Governance," [Online]. Available: https://e-estonia.com/solutions/e-governance/

[15]   Deloitte, "Deloitte Global Mobile Consumer Survey, Middle East Edition 2019: Mobile consumption in a post-growth world," November 2019. [Online]. Available: https://www2.deloitte.com/content/dam/Deloitte/xe/ Documents/technology-media-telecommunications/ GMCS-whitepaper.pdf

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YESSER – from e-Government to digital government and beyond

As far back as 2003, the modernisation of government services was established as a priority in Saudi Arabia, with a Royal Decree requiring the *Ministry of Communications and Information Technology* to formulate a plan for offering government services and transactions electronically. This was followed, in 2005, by the *Ministry of Communications and Information Technology*, working with the *Ministry of Finance and the Communication and Information Technology Commission*, to develop the Saudi e-Government Program known as *YESSER*.

YESSER was launched with four goals:

Raising the public sector's productivity and efficiency

Providing better and more easy-to-use services for individual and business customers

Increasing return on investment

Providing the required information in a timely and highly accurate fashion

From the above objectives it is clear that for almost two decades the Saudi Arabian Government, through *YESSER*, has been aiming to enhance the experience and accessibility of government services through taking them online.

Director General at *YESSER*, Ali Nasser Al-Asiri, has recently indicated that the e-government programme is continuing to develop to meet contemporary standards and citizen appetites:

A decade ago, we used to do e-government as electronic transactions, which are limited in scope. Digital government is about the human touch and the values this implies. It is about talent, development, and user-experience. Our target, for example, is not to go to a paperless government but to a complete digital experience that can truly satisfy citizens' needs. [16]

[16]   The Business Year, "85% Paperless Government by 2020," 24 November 2020. [Online]. Available: https://www. thebusinessyear.com/saudi-arabia-2018-19/ali-nasser-al-asiri-ministers-advisor-and-general-director-yesser-e-government-program/vip-interview

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Vision 2030, The National Transformation Program and Government Services

Vision 2030 is an all-encompassing vision of ambitious reform, a central part of which is the *National Transformation Program* (NTP) which aims to "raise the quality of government services". 37 of the *Vision 2030*'s 96 strategic objectives sit with the NTP [17], demonstrating the importance of government service reform to *Vision 2030*. Each of the strategic objectives is supported by tangible initiatives and programmes.

Digitisation and user-experience are themes that run through many of the strategic objectives. Examples include the digital transformation of the healthcare sector through telemedicine and tele-consultations, and the design of a unified e-system for patient referrals and appointments [18]. Some digital services are already up and running, such as Watani, a smartphone app to solicit feedback from Saudis on their experience of government services [19].

In order to assess the level of digitisation in the provision of government services, the *Government Service Maturity Indicator* was established by the KSA Government. According to the latest statistics, 81% of e-government services are at maturity, following a review of 174 entities and 3,553 e-services [20].

For an external evaluation, the Government uses the *United Nations' E-Participation Index* to rate its digital transformation reforms. Out of the 196 countries included in the Index, KSA ranks 43rd for E-Government and 66th for E-Participation [21].

In addition to reforming the way citizens access government services, the Government is transforming who will deliver services to citizens. There is a commitment in the NTP to maximise the potential of the private sector in the delivery of public services; indeed, the NTP plan mentions the 'private sector' 74 times [18]. Private sector support in delivering government services will be extensive, whether it is in healthcare, aquaculture, wastewater management, or the running of call centres [18]. As the NTP is implemented, more and more services will be delivered to citizens by a more dynamic mix of providers.

The Government's public services reforms are historic in their ambition. The question is whether the Government can successfully implement all of these reforms simultaneously. Its financial commitment, combined with the focus on public-private partnerships, bodes well in this regard. But managing delivery whilst maintaining standards in government services will inevitably be a difficult balancing act.

[17]   S. Grand and K. Wolf, "Assessing Saudi Vision 2030: A 2020 Review," Atlantic Council , June 2020. [Online Available:https://www.atlanticcouncil.org/wp-content/uploads/2020/06/Assessing-Saudi-Vision-2030-A-2020-review.pdf

[18]   Government of the Kingdom of Saudi Arabia - Vision 2030, "National Transformation Program - Delivery Plan 2018-2020," 6 June 2016. [Online]. Available: https://www.vision2030.gov.sa/sites/default/files/attachments/NTP%20English%20Public%20Document_2810.pdf

[19]   Google Play/The National Center for Performance Measurement, "Watani - We hear you," 28 October 2020. [Online]. Available: https://play.google.com/store/apps/details?id=com.watani.android&hl=en_GB&gl=US

[20]   Government of the Kingdom of Saudi Arabia - Vision 2030, "National Digital Transformation - Annual Report 2019," 1 April 2020. [Online]. Available: https://ndu.gov.sa/report/ndu-annual-report-en.pdf

[21]   United Nations , "United Nations E-Government Knowledgebase - Saudi Arabia," 10 July 2020. [Online]. Available: https://publicadministration.un.org/egovkb/en-us/Data/Country-Information/id/149-Saudi-Arabia/dataYear/2020

Key finding 3

Does digitisation deliver the outcomes service users want?

Citizens' views of government services are mixed and suggest reform is necessary, something the Government clearly recognises. On the positive side, service users regard government services as digital (77%), attentive (72%), modern (79%), clear (77%) and consistent (76%) in the information they provide.

However, there are significant proportions of citizens and residents who regard government services as complicated (48%), slow (42%), and generic (58%).

72% Attentive
42% Slow
79% Modern
48% Complicated
77% Digital
77% Clear
58% Generic
76% Consistent
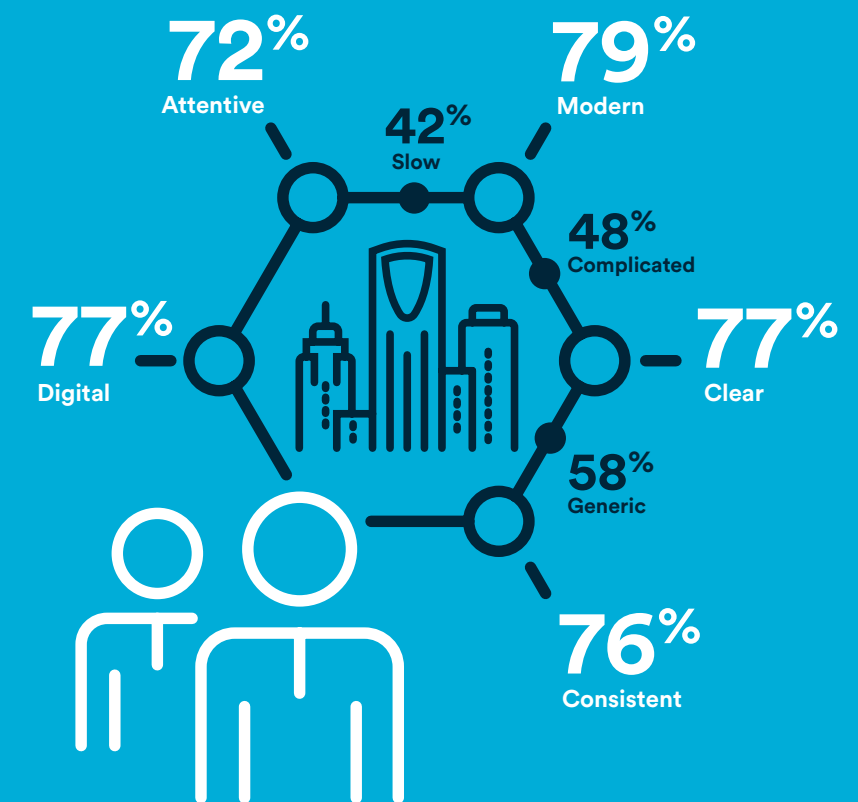
According to this feedback, therefore, government services should aim to be quicker, more personalised, and more transparent. Digitising access to government services is a clear way of achieving these goals, by giving service users more control, as well as simpler and faster ways of accessing services.

Furthermore, evidence that the process of government services digitisation should continue – and be accelerated where possible – is found in the fact that the majority (54%) of people who indicated a preference said that they use digital government services wherever possible. A further 40% of those who showed a preference said that they 'feel comfortable using digital government services for most things'.

The conditions for digitisation have heightened further due to citizens and residents' willingness to use – and potentially their competence with – digital services because of Covid-19. 62% of people surveyed said that the pandemic means they are now more likely to access government services digitally.

62% of
people surveyed
said that the pandemic means they are now more likely to access government services digitally
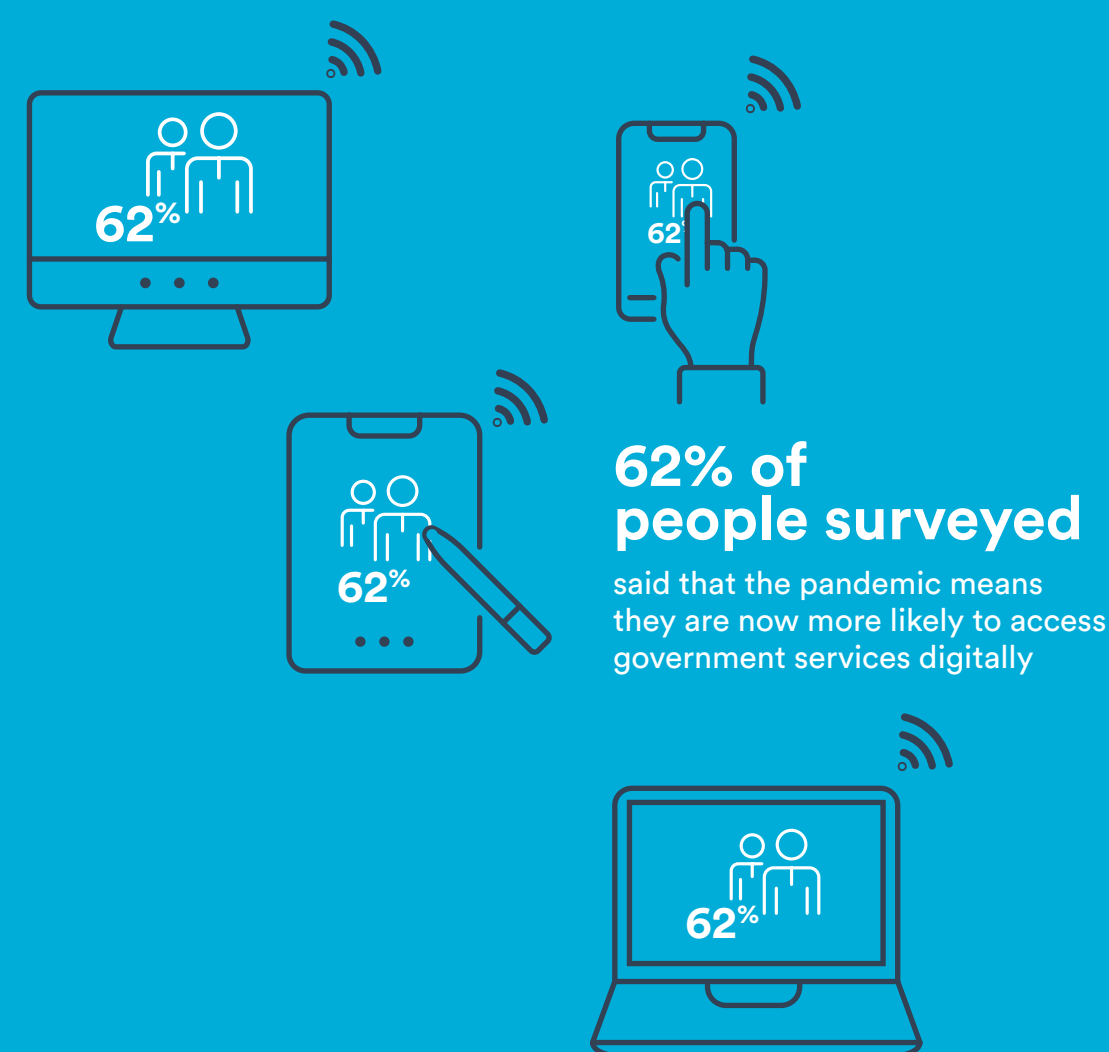
On the right path, but the margin for error is small

With *YESSER*, *Vision 2030* and a wide range of digitisation initiatives, Saudi Arabia is clearly on the right path when it comes to satisfying the preferences and wants of citizens and residents in relation to the future of government services. However, with such a comprehensive plan for transformation there are an equally comprehensive range of risks. As the survey data has identified, if any of these risks are realised and government services suffer, the trust and happiness of citizens and residents will quickly be negatively impacted.

The consequences of poor implementation are significant. As noted above, over 1 in 2 people reported that a single negative experience with a service impacts their trust in government services overall. Therefore, if service users have one bad experience due to digital transformation, it is possible their trust in *Vision 2030*'s government service-related reforms could decrease.

This may result in less take-up of digitised government services and the use of more expensive physical channels, such as in-person customer service centres. Such a scenario would have a double financial hit; on one hand the investment in digital transformation would be compromised, and on the other, more demand for physical channels comes with increased costs, such as the development of further infrastructure.

There is also another consideration that reinforces the importance of effective transformation – citizens and residents' 'happiness'. Some 80% of respondents said that their experience of government services impacts their overall happiness. Therefore, issues with implementation of government service transformation would not only have serious impacts for trust, but for the overall happiness of Saudi Arabia's citizens and residents.

Leave no service behind – maintaining standards in services not transforming

It should also be noted that the transformation of services should not mean that those which will continue to be delivered through their existing means can be left to deteriorate – or fail to keep pace with the expectations of citizens.

As an increasing number of services and service users move to digital platforms, physical government service platforms (such as customer service centres) should see a proportional increase in capacity. This in turn should lead to improved experiences for people accessing government services in-person.

However, the continued effective management of these platforms is key, as the same 'trust' issue which could affect digitised service that are delivered poorly could materialise amongst those people who use these physical platforms if standards begin to fall. In other words, if standards decrease in customer service centres due to their de-prioritisation triggered by a greater focus on digitised services, those people who continue to use in-person services could lose trust due to a bad experience, which, as we know, has an impact on their feelings towards government services and 'happiness' more generally.

It is imperative, therefore, that standards are upheld across all platforms through which people access government services – regardless of whether they are transforming or not.

The 'national contact centre' *Amer* is a noteworthy example of where a non-digital platform has kept pace with the developments made to its digital equivalents to ensure an enhanced user experience. The initiative has seen the creation of a single, unified way to contact a range of government agencies by telephone (as well as online via forms, social media and live chat functions). 32 government bodies are listed as contactable via *Amer* – from the postal service to the housing authority – allowing citizens and residents to access a range of services through a single telephone number [22].

User experience – services designed by service users

When considering user-experience, it is critical that government and its partners do not consider digital services in a vacuum. Rather, they should aim to replicate the very best of digital services offered by the private sector. It is these private sector digital applications that citizens will judge the user-experience of government services against.

Our survey indicates a high level of digital competence amongst KSA's citizens and residents, with **87% of respondents reporting that they are comfortable using digital services in general**. In fact, survey respondents indicated a marginally higher level of comfort and satisfaction (87%) with digital services in general (i.e. those provided by the private sector), compared to government services offered digitally (83%).

This highlights that the KSA Government need not only keep pace with other governments' digital service offering, but also with the private sector's digitisation agenda – from taxi and food ordering apps, to retail and smart home systems.

Encouragingly the Government's *National Transformation Program* consistently notes the importance of user-experience in shaping digitised services and the role of the private sector in achieving optimised transformation. This is exemplified by the fact that the Government has launched the smartphone app *Watani*, which, as already noted, is designed specifically to solicit feedback from citizens and residents on their experience of using government services.

[22] gov.sa, "National Contact Center (Amer),"
25 November 2020. [Online]. Available:
https://www.my.gov.sa/wps/portal/snp/pages/amer/!ut
/p/z0/04_Sj9CPykssy0xPLMnMz0vMAfIjo8zi_QxdDT
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The Government's public services reforms are historic in their ambition.

The question is whether the Government can successfully implement all of these reforms simultaneously.
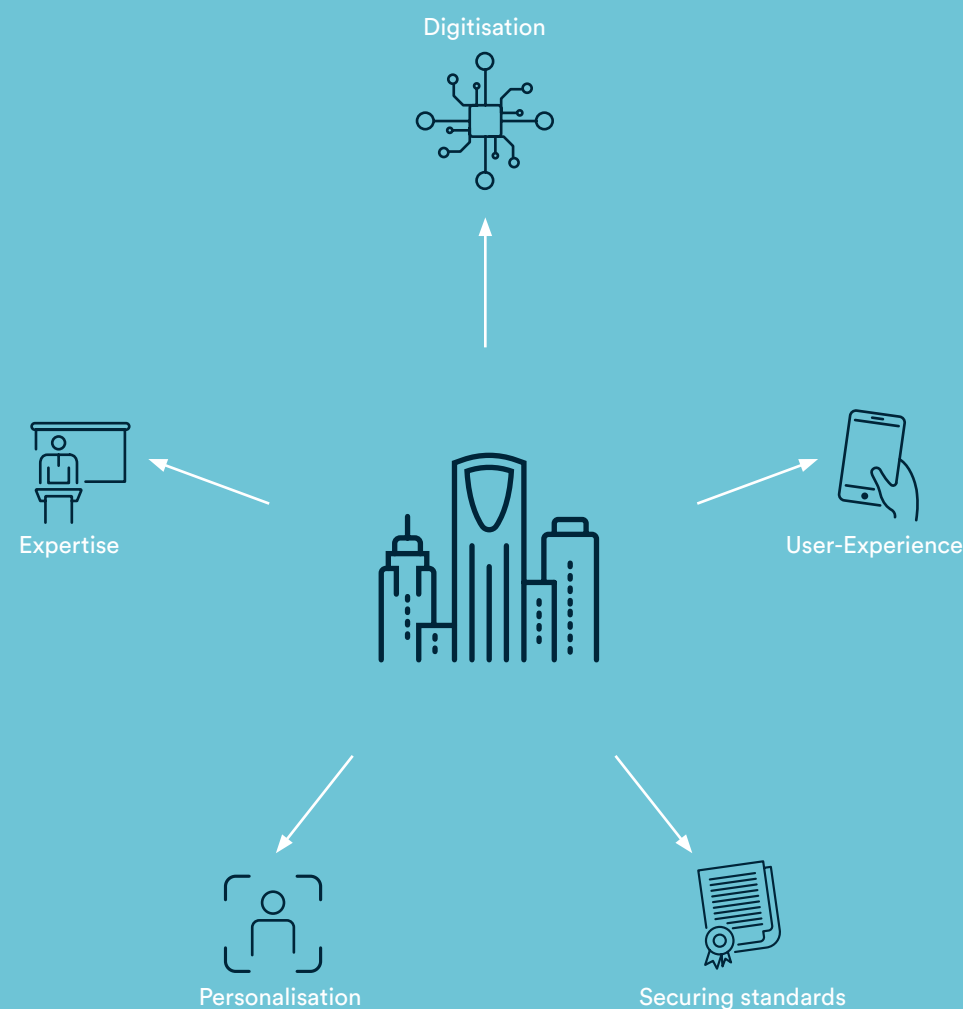
Conclusion & recommendations

Our survey found that citizens and residents are generally 'happy' with the quality of services offered by the Saudi Arabian Government. However, significant challenges remain, with our survey uncovering a desire for faster, more personalised and simpler process amongst service users.

A solution to these issues could lie in increasing digital access to government services – something our survey also showed service users want to see.

For almost two decades, creating online access to government services has been a priority in Saudi Arabia. Driven on by *YESSER* and *Vision 2030*, these reforms are accelerating.

However, these organisations, initiatives and reforms will only be effective in satisfying the wants of service users if they are delivered effectively. The survey data shows there is little margin for error, with one sub-standard interaction with government services impacting the happiness and overall trust of citizens and residents in government services.

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Digitisation

Expertise

User-Experience

Personalisation

Securing standards

Through our data-led research, we have identified five key policy recommendations

Key policy recommendation 1

Continue on the path of service digitisation

Those delivering and using government services will benefit from the continued move towards creating better digital access. Significant cost, accessibility and efficiency gains, alongside an appetite amongst KSA residents to see further digitisation are clear motivations for the Governments to continue on the current trajectory to enhance their digital offering.

The KSA Government will need to incorporate the latest innovations in technology – for example, AI and automation – so that services maintain (or outpace) comparable government and private sector platforms, with which service users will interact.

Key policy recommendation 2

Create the capacity for personalised service delivery

Although the survey found that people were generally 'happy' with government services, one of the more commonly cited criticisms was that they were 'generic'. The digitisation of services should help with this issue.

However, it is recommended that further examination takes place of how services where residents interact with government services staff could be more personalised. This could lead to a refinement of the training procedures, scripts and processes used by government staff.

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Key policy recommendation 3

Obtain the necessary expertise to manage service transformation

Crucial to all of the changes taking place in the KSA's government service reforms is the effective management of transformation. This research clearly identifies that a single bad interaction with a government service can have a significant impact on an individual's attitudes towards government services in general.

Poor execution of service transformation will not only lead to significant financial costs, but undermine the primary aim of project – to deliver a better experience for residents.

It is therefore crucial that the Government does as it says it will and make use of international experiences and expertise, drawing on the private sector and other external stakeholders to ensure the process of transitioning to new ways of accessing government services is managed effectively.

Key policy recommendation 4

User-experience must drive service design

The people that are going to be using services will give the best insights when it comes to how they should be designed. Policy makers should consult service users to understand how and what access they want to government services.

Testing user-experience and understanding the insights before rolling out new services or platforms will ensure that issues can be identified, and refinements made before they are used by the population at-large. Not only will this lead to better outcomes in terms of customer happiness, but reduce costs in the long-term as fewer large-scale re-designs will be necessary.
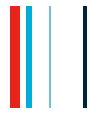
Key policy recommendation 5

Securing standards in platforms that are not 'transforming'

Although a significant transformation of government services is already underway, it is crucial to recognise that some people will continue to access them through existing platforms such as customer service centres and telephone-based contact centres. Standards must be retained, therefore, across all platforms. Facilities should continue to be developed across all government services, alongside providing staff with the necessary skills development and training opportunities.

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