Customer-Centric E-Government
Modernizing the MENA Region’s Public Sector
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EXECUTIVE SUMMARY

Although countries in the Middle East and North Africa (MENA) region have made great strides in implementing e-government, there is still substantial ground to cover. The region's citizens must be technologically literate, and they must have access to computers and the Internet. Nations must have legal and regulatory frameworks that inspire trust and confidence by addressing issues such as data protection, consumer rights, and IT security standards. Government institutions must be independent enough to allow for rapid and effective decision making, while still interconnected enough to take a holistic approach to providing service.

To successfully implement e-government models, nations in the MENA region must take a customer-centric approach to their government services, understanding each service from their constituents' perspective to determine how best to provide them. Governments must create comprehensive development plans that recognize their own unique circumstances in terms of environment, readiness, and usage, and plan accordingly to roll out e-government in a way that offers success in the short term and an integrated, efficient, and sustainable program in the long term.

The development of electronic government (e-government) capabilities—government services offered online to citizens, businesses, other government entities, and employees—is crucial both for its own sake and as part of a nation’s broader technological development. Internationally, e-government allows countries to compete more efficiently for foreign investment. At the national level, e-government is an essential response to pressure from citizens and companies for modernization, better service, transparency, and participation.
In order to access government services or information, such as how to apply for a visa or register a commercial business, citizens have traditionally had to visit a government office in person. But as people have begun to bank, shop, and communicate online, they have come to expect online services from their governments as well. Because of this shift, governments across the MENA region must adapt to new ways of working, more effectively utilize technology, and develop a far more intense customer focus.

Electronic government models use Internet technology to make operations within the government more effective and deliver services more efficiently. Adopting such a model results in less paperwork, streamlined operations, better use of resources, and greater accountability; it is also a key part of a broader evolution toward an information or knowledge-based society. Widespread use of e-government, furthermore, usually has a stimulus effect on all modes of e-commerce—thus, high-performance e-government can also lead to more investment, greater participation in international trade, and increased global competitiveness. Around the world, e-government is high on the agenda of most governments as they strive to become more customer-centric and to lead their countries in information initiatives. This e-government evolution is not just a buzzword; it is an essential issue for regions, countries, and cities in light of:

- Global competition to attract investments and the need to foster diversity in national economic development
- Pressure for public-sector modernization from citizens and companies
- A desire for increased efficiency and service orientation in public administration
- The drive for new ways to meet citizens’ needs and offer transparency and participation
- An increasing digital divide between rural and urban areas.
The adoption of e-government is vital for MENA countries to maintain a place in the increasingly competitive global arena, facilitate an environment conducive to foreign investments, and consistently support national sector developments. But until recently, MENA countries—particularly the six in the Gulf Cooperation Council (GCC)—took a cautious view of information and communication technology (ICT) in general. This dynamic has changed over the last four years, however, and some of these countries—such as the United Arab Emirates, Qatar, and Saudi Arabia—are now emerging as global pioneers in e-government (see Exhibit 1).

**Exhibit 1**
*E-Government Readiness in MENA Countries Is Steadily Improving*

<table>
<thead>
<tr>
<th></th>
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<tbody>
<tr>
<td>Bahrain</td>
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<td>Tunisia</td>
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<td>-3</td>
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<td>138</td>
<td>-2</td>
</tr>
<tr>
<td>Chad</td>
<td>182</td>
<td>169</td>
<td>-13</td>
</tr>
</tbody>
</table>

Across the region, economic development, government reform, and bold commercial ventures are common, particularly in GCC countries. In this climate of great change, there exists the perfect opportunity to develop e-government as part of state reforms—and therefore, introduce a state-of-the-art customer-centric administrative system without the burden and complexity associated with the integration and maintenance of legacy systems, many of which are outdated (see Exhibit 2).

The greatest opportunity in e-government adoption lies in national development. Aside from the benefits in terms of state efficiency and citizen satisfaction, an e-government development agenda will increase the technological skills of civil servants. It will create a healthier, better-prepared ICT private sector that can effectively implement, support, and maintain the e-government applications. The private sector will also be able to drive other national ICT initiatives, such as e-commerce, based on the high demand generated by government e-procurement. Furthermore, successful e-government programs include those that promote the overall computer literacy of the population—not only as a prerequisite for using e-government services, but also for other national e-initiatives in the areas of education, health, and commerce. The widespread adoption of ICT required to enable e-government implementation programs will also bring cost savings to the state, particularly as a result of better productivity and effective decision making.

### Exhibit 2
**Traditional and Next-Generation Approaches to Implementing E-Government**

<table>
<thead>
<tr>
<th>Time</th>
<th>Traditional Approaches</th>
<th>Holistic Government Transformation Approaches</th>
</tr>
</thead>
<tbody>
<tr>
<td>1980</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1990</td>
<td>Promote access and connectivity</td>
<td></td>
</tr>
<tr>
<td>2000</td>
<td>Wave 1: Provide services online</td>
<td>Wave 2: Beyond traditional e-government</td>
</tr>
<tr>
<td>2015</td>
<td>Wave 3: Transform the enterprise</td>
<td>Wave 3: Transform business processes and organization</td>
</tr>
<tr>
<td></td>
<td>Wave 4: 3a: Automate existing processes</td>
<td>Wave 4: 3b: Transform business processes and organization</td>
</tr>
</tbody>
</table>

Note: Benefit for the public means service effectiveness and e-literacy development; for the government, it means service efficiency; and for employees, capacity development.

Source: Booz & Company
PREREQUISITES AND BARRIERS TO E-GOVERNMENT

There are a number of elements that must be in place for any e-government program to be successful. First and foremost is a stable political and economic environment, in which the government has the resources to effectively budget, plan for, and implement the program. Following that is an e-government development agenda with a clearly defined timetable: This will allow those responsible for implementation in both the public sector (specifically the agency or office entrusted with realizing the e-government program) and the private sector (mainly the relevant technology services and products providers) to better manage the tough task ahead of them.

Another essential element is a citizenry comfortable with the adoption of innovative ideas and practices, including those regarding ICT. After all, there is little point in providing a state-of-the-art e-government system to a population that is largely computer illiterate or one that does not have access to an Internet connection (see Exhibit 3). A number of Middle Eastern countries, such as the UAE, Qatar, Saudi Arabia, and Jordan, have taken steps to increase knowledge of ICT among their populations, along with access to computers and the Internet.\(^2\)

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Exhibit 3
Internet and PC Usage Remain Relatively Low in the MENA Region

<table>
<thead>
<tr>
<th>COUNTRY</th>
<th>INTERNET SUBSCRIBERS PER 100 INHABITANTS</th>
<th>INTERNET USERS PER 100 INHABITANTS</th>
<th>ESTIMATED PCs PER 100 INHABITANTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>United Arab Emirates</td>
<td>20.64</td>
<td>51.59</td>
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<td>Egypt</td>
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<td>Kuwait</td>
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<td>31.57</td>
<td>22.33(^1)</td>
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<tr>
<td>Qatar</td>
<td>10.34</td>
<td>41.75</td>
<td>18.71</td>
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<tr>
<td>Bahrain</td>
<td>9.15</td>
<td>33.22</td>
<td>18.28</td>
</tr>
<tr>
<td>Saudi Arabia</td>
<td>10.11</td>
<td>25.55</td>
<td>13.69</td>
</tr>
<tr>
<td>Jordan</td>
<td>3.80</td>
<td>19.02</td>
<td>6.34</td>
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<tr>
<td>Lebanon</td>
<td>6.34</td>
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<td>11.62</td>
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<tr>
<td>Tunisia</td>
<td>2.45</td>
<td>16.68</td>
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<td>Syria</td>
<td>3.49</td>
<td>17.41</td>
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<td>Oman</td>
<td>2.69</td>
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<tr>
<td>Morocco</td>
<td>1.55</td>
<td>21.14</td>
<td>2.99</td>
</tr>
</tbody>
</table>

\(^1\) 2006 data.

\(^2\) 2005 data.

Source: International Telecommunication Union
Across the region, there are also issues pertaining to language barriers: A significant part of the population speaks only Arabic, yet there is limited Arabic content online. Cultural barriers also pose a problem, with governments imposing Internet access restrictions; availability, affordability, and access are also barriers to regional ICT adoption. Finally, the government cannot get a return on its investment, in the form of customer satisfaction or benefit, without a society of stakeholders (citizens, businesses, employees, and other governments) that is aware of, and has been educated to be connected to, this new service delivery model. Excellent e-government solutions have failed simply from lack of customer usage or uptake. A well-thought-out campaign to foster awareness and informal education is but one readiness solution to pursue.

From a governance perspective, e-government requires government institutions that have autonomy from the center. Government entities should be not just decentralized—with a central regulator overseeing satellite offices—but deconcentrated—with remote entities operating independently as long as they achieve certain performance goals. Deconcentrating the structure of the government will facilitate timely decision making and thus promote more efficient government performance. Also, allowing the private sector to run certain government operations, such as fee collection and municipal services, while the government acts solely as a fair broker or regulator allows for effective delivery of services, usually at a reduced cost. At present, however, the state’s share of the economy is higher in the economies of the MENA region than in most other regions of the world. Establishing a comprehensive system of good governance within a modern framework is still a challenge in many countries.

Human resource development in the public sector is also key in the creation of e-government. Traditionally in many MENA countries, particularly those outside of the GCC, the public sector has been viewed as an employer of last resort. But with leadership that is more forward-thinking, attitudes that are more open, and ambitious nationalization programs, this is already changing.

Weaknesses in legal and regulatory frameworks are also hindering advances in e-government. Although most MENA countries realize the importance of such legislation and regulation and have taken some action in the area, only a few have put in place the laws and regulations that facilitate the rollout and adoption of efficient and secure e-government—i.e., for automation, data sharing, and online service provision. To be comprehensive, these laws should also appropriately address issues like data protection, consumer rights, and IT security standards. Conflicts between new e-laws and older sector laws that pose barriers to the implementation of e-government must also be identified and removed. By providing predictability and certainty, a sound legal and regulatory regime creates greater user trust and confidence, which in turn leads to greater use of e-government services.

Enabling e-government opens the door to globalization; until these issues are addressed, the MENA region will not reap the same benefits of globalization as other regions. Take, for example, the function of government procurement or tendering: E-procurement (a central and shared e-government application) makes global vendor marketplaces accessible, so governments can find required services and products at the best cost. In this context, e-government drives national and international e-commerce and hence national and global trade. E-government also forces countries to develop their ICT infrastructure, which makes these countries more attractive to foreign investors.

A sound legal and regulatory regime creates greater user trust and confidence, which in turn leads to greater use of e-government services.
THE STATE OF ELECTRONIC GOVERNMENT IN THE MENA REGION

The adoption of e-government is occurring at varying rates in the region. Some GCC states’ bold leap into e-government has been fueled by national leaders’ recognition of the need for ambitious modernization across all sectors, including the government. They believe that modernization in the public sector will serve as a catalyst for national development. Some of these countries, such as the UAE, Saudi Arabia, and Qatar, already have a framework in place, and the potential to not only join other countries on the e-government continuum, but to jump ahead of them. At present, however, when it comes to e-government readiness, GCC countries still score only moderately on a global scale (see Exhibit 4).

Exhibit 4
The MENA Region Overall Lags Global Standards for E-Government Readiness

ARAB WORLD COUNTRIES VERSUS GLOBAL E-GOVERNMENT READINESS

Note: PPP = purchasing power parity.
Source: UN E-Government Survey 2008: “From E-Government to Connected Government”; CIA Factbook; Booz & Company analysis
Other MENA countries, although they have taken tentative steps on the road to e-government, are still lagging behind the rest of the world in terms of adopting a more customer-centric style of administration. For these countries to remain competitive and facilitate the right environment for investments and national sector developments in a dynamic, ICT-driven world, they must take a great leap, turning their administrations from paper-based leviathans into dynamic, customer-centric, efficient e-governments. This demands the creation of a comprehensive development agenda, which will bring together some of the piecemeal attempts being made in some countries to date, and enable a more effective, coherent, and transparent adoption strategy. For these countries, effective e-government is still a long way off.

In the MENA region as a whole, there is now clearly a need to create and maintain momentum. To maximize momentum, four fundamental criteria, variable by locale, are necessary:

- **Authority:** the power to effect change, whether by consensus, a mandate from above, or a combination of both
- **Ambition:** a focused desire or intent for improvement
- **Ability:** financial and human capital, whether incumbent or solicited from additional sources, allocated and utilized to achieve the desired changes
- **Agility:** the capacity and willingness to obtain feedback, observe opportunities, and constantly adapt

Every MENA government should recognize these criteria and use them to position the region as an international leader.

**The GCC**

GCC countries have clearly demonstrated their ambition in implementing e-government, given the strides they have made in recent years. In terms of authority, GCC countries do have an advantage in their lack of highly autonomous bureaucracies. Royal leadership holds strong command over government and can initiate and drive holistic reforms. In addition, Kuwait, Bahrain, and Qatar have a de facto single-tier government structure, which makes implementation of reforms less complex than it is in multtier or federal states. However, authority generally comes from above; GCC countries would be more effective if they were also able to generate change through consensus. Although most GCC countries have begun the process for building consensus, they still have some ground to cover.

As for their ability, GCC countries are strong in financial capital: They are among the richest in the world in terms of GDP, mostly due to oil and gas revenues. Although national levels of wealth might differ among these countries because of factors such as discovered energy reserves and population size, all six GCC countries are among the leading global nations on a GDP per capita basis. This bodes well for their ability to surmount the challenges inherent in national ICT adoption. However, they are lacking in human capital, with most talent still being imported. Programs aimed at developing skilled nationals are being promoted by all GCC countries.

GCC leaders are quite keen to consistently improve and adapt their government modernization programs to international best practices, exhibiting a sense of profound agility.
The Levant

Looking at the Levant’s ability to implement e-government, its problem is the opposite of the GCC’s; it is rich in human capital, with an educated populace and a large pool of talent, but it lacks the financial capital to really push e-government initiatives. As long as economic—and political—instability remain in countries like Lebanon, they will witness an ever-increasing exodus of talent, mainly to GCC countries. A lack of financial capital and intermittent political strife also restrict the region’s agility in terms of constant improvement and international best-practice adaptation for planned e-government programs.

A lack of authority hinders Levantine countries as well. In Lebanon, for instance, the main barrier to adopting e-government is not lack of readiness, understanding, or even willingness, but rather ongoing political instability, both domestic and in the immediate region. The same is true in Jordan: Although there are implementation plans in place, little has actually been completed in terms of online services, and many departments are running at different implementation speeds. Implementation efforts have abated over recent years, mainly due to the numerous changes in government.

Finally, it is not clear that the Levant has the requisite ambition to put the necessary resources into e-government implementation. Lebanon produced an e-government strategy back in 2002 and then updated it in 2008; as of June 2009, the document has not been officially adopted. Many international organizations, such as the United Nations Development Programme, the World Bank, the United States Agency for International Development, and even the European Commission have extensively supported e-government programs in Levantine countries with varying levels of success. Failures in this regard have been attributed to recipient governments’ lack of commitment on needed reform measures.

North Africa

North Africa is facing issues on a number of fronts as it implements e-government. In terms of ability, the region’s countries need to develop either financial or human capital or both. With large and growing populations, these countries have enormous socioeconomic development challenges that require considerable financial resources. And for some countries, the national skilled workforce is limited given low literacy rates; therefore, technical resources must be imported.

Given this background, although countries in the region derive their authority from a strong government mandate, the public sector has so many national concerns that the comprehensive adoption of e-government is not a top priority. Having large public sectors also inhibits the region’s agility, as bureaucracy makes it difficult to adapt to changing circumstances.

Across North Africa there is a desire to advance the public sectors in the direction of e-government, yet the many national issues have hindered a focused intent or ambition. Egypt leads the region as an early adopter; it launched several infrastructure and readiness projects in 2001, most notably the development of the first government-wide e-services portal in the region. Egypt’s e-government initiatives enjoy strong political support—the current prime minister introduced the initiatives when he was ICT minister.
THE CUSTOMER-CENTRIC MINDSET

The notion of service is critical to transforming government from a strongly autonomous but fragmented sector into a streamlined group of organizations acting on behalf of, and for the benefit of, customers. Adopting a service orientation means reinventing interactions between customers and the government from the customer’s perspective.

Aiming for a more customer-centric approach means governments must introduce a perspective in their transactions with customers that is more similar to the private sector’s. A government service can be seen as the complete set of activities or products required by a customer. The traditional model of government agencies operating as separate entities—meaning customers have to visit numerous separate offices—is simply no longer viable. An effective government serves its customers without obliging them to spend hours—much less days—visiting different government locations to obtain the required information on supporting documents for a service application.

From a customer’s perspective, good service equals one user-friendly interface, without concern for, or knowledge of, internal procedures and responsibilities. The creation of such one-stop shopping requires public-sector agencies to act as one government.

Rethinking government operations from a customer’s perspective and offering services in a consistent, unified way requires a clear understanding of who the government’s customers are. There are four very broad government-to-customer interaction models, based on different customer segments: citizens, businesses, other government entities, and employees.

Government interactions with citizens and businesses constitute the provision of external services, such as issuing drivers’ licenses for citizens and commercial licensing for businesses. Government interactions with employees and other government entities, conversely, represent the provision of internal services, such as pension services for employees and software licensing services for other government entities.

In facilitating these interaction models, ICT—and especially the Internet—can drive the change toward a service orientation, and hence customer-centricity, enabling all customers to fulfill their services in a consistent and efficient manner, at the time of their choosing and through a common intuitive interface.

Moreover, such a customer focus and service orientation provide purpose. They do not exclude further goals of ICT usage, such as more efficiency and human resources development, but provide an overarching theme that is linked to the inherent purpose of government: to provide service to its customers. As a result, there will be increased focus, efficiency, and legitimacy in government.

Rethinking government operations from a customer’s perspective requires a clear understanding of who the government’s customers are.
PUTTING E-GOVERNMENT IN PLACE

In order to create an effective system of e-government, it is necessary to have a comprehensive development agenda. Overly ambitious transformation is unsustainable and cannot be achieved by a set of loosely defined or random individual improvement activities. Instead, sensible e-government transformation is founded on a comprehensive agenda involving the government as a whole, aimed at holistically enhancing its services—from the underlying infrastructure to service operations and delivery channels. This governing strategy should set realistic improvement targets and implementation plans, and define clear sets of ownership for the different initiatives, as well as a simple, transparent interaction and communication model. Sponsorship at the highest political levels is paramount, and the effort should be driven by a delegated and empowered government entity from planning and design through to implementation and operation.

There are three key dimensions that must be taken into consideration in designing an e-government strategy: environment, readiness, and usage. Each of these elements is critical at both the level of specific government entities and across the government.

Environment: Political leaders at a national level must be behind the initiative to ensure that it gets the requisite sponsorship and drive. Other factors to consider include the population’s level of computer literacy, awareness, and willingness to use e-government; the affordability of communications technology; local politics; budgetary requirements; and ICT infrastructure. It is also crucial that the correct legal and regulatory framework be in place—including the creation of an agency, committee, or department with responsibility for implementing the development agenda.

Readiness: Careful planning of technology infrastructure, collaboration strategies (between government entities), and adherence to IT standards and architecture, as well as IT resources and capabilities, must take place, ensuring the agenda is not too ambitious. Of course, the final part of readiness is human resource management, in terms of staff abilities and the overall organizational culture.

Usage: This is the most crucial aspect as it involves looking at the actual service provision of e-government—the customer-facing part of the exercise. It should include service prioritization, examination of the most effective channels, and feedback on the direct usage experience. To prioritize services, the government must look at its entire portfolio of services, cluster them by common service themes, and then prioritize them for implementation. There are numerous criteria for determining which services should take priority: frequency of use and impact on customers; the effect on national development; and the government entity’s ability to offer the service, based on internal systems and staff capabilities. Closely linked to the prioritization process is the determination of the most effective delivery channels for each service, whether solely through the e-government portal platform, or also through kiosks, telecenters, contact centers, or mobile telephones. Finally, having a feedback mechanism in place to gauge customer satisfaction with the provision of government services through the different delivery channels fosters a continuous
improvement process. These factors not only constitute the usage foundation for an e-government development agenda, but also form the basis on which continuous refreshment of this agenda is effectively realized.

Ultimately, it is the vision of leadership, or of the e-government steering committee, that will drive the agenda forward. But there are key elements of any e-government vision that are common to all—it must be a service-driven, customer-centric plan. It must focus on holistic provision of services and not look at individual government entities and services in isolation. There must be buy-in from the whole of the government, with agreed timetables for implementation and deadlines. It must also, ultimately, be embedded into the broader society, as an e-government strategy should complement overarching national ICT strategies and other sectoral policies.

The development agenda must be rigorous, yet also flexible. The agenda must be managed for the long term, along four- to five-year time frames. It should recognize that there will be differences between departments in terms of legacy systems, abilities, and budgets, and ensure a collaborative approach.

The development agenda is the basis for a four- to five-year implementation plan, which takes into account tactical and strategic priorities when determining which environment, readiness, and usage initiatives to enact at what point. To ensure initial momentum in the short term, governments should first launch a set of environment and readiness initiatives that offer immediate benefits. For example, in terms of the environment, such initiatives might include enacting the cyber laws and regulations that will protect customers and make them willing to use the technology, as well as conducting an e-maturity assessment that will help governments gauge their progress in the future. In terms of readiness, these initiatives might be the development of a reference set of IT architecture and standards and the design of an information-based government portal. Then, the remaining environment and readiness initiatives can be implemented along with usage initiatives. All of the necessary initiatives should be organized into a series of at least three waves for effective rollout, in order to gradually build the program, develop capacity, and make sure e-government’s implementation is not hindered by an attempt to do too much at once.

CONCLUSION

The development of e-government is an ongoing journey that follows a carefully marked path, laid out by the principles we’ve outlined. Even those countries around the world with well-developed e-government strategies are still investing, improving, planning, and developing new ideas.

There is clearly a strong will on the part of most MENA countries to employ an overarching e-government model. With a comprehensive development agenda, sustained momentum, and the right skill sets these countries can ensure more rapid, satisfactory, and appropriate adoption of e-government across the region.
Endnotes

1 The GCC includes Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, and the United Arab Emirates.


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