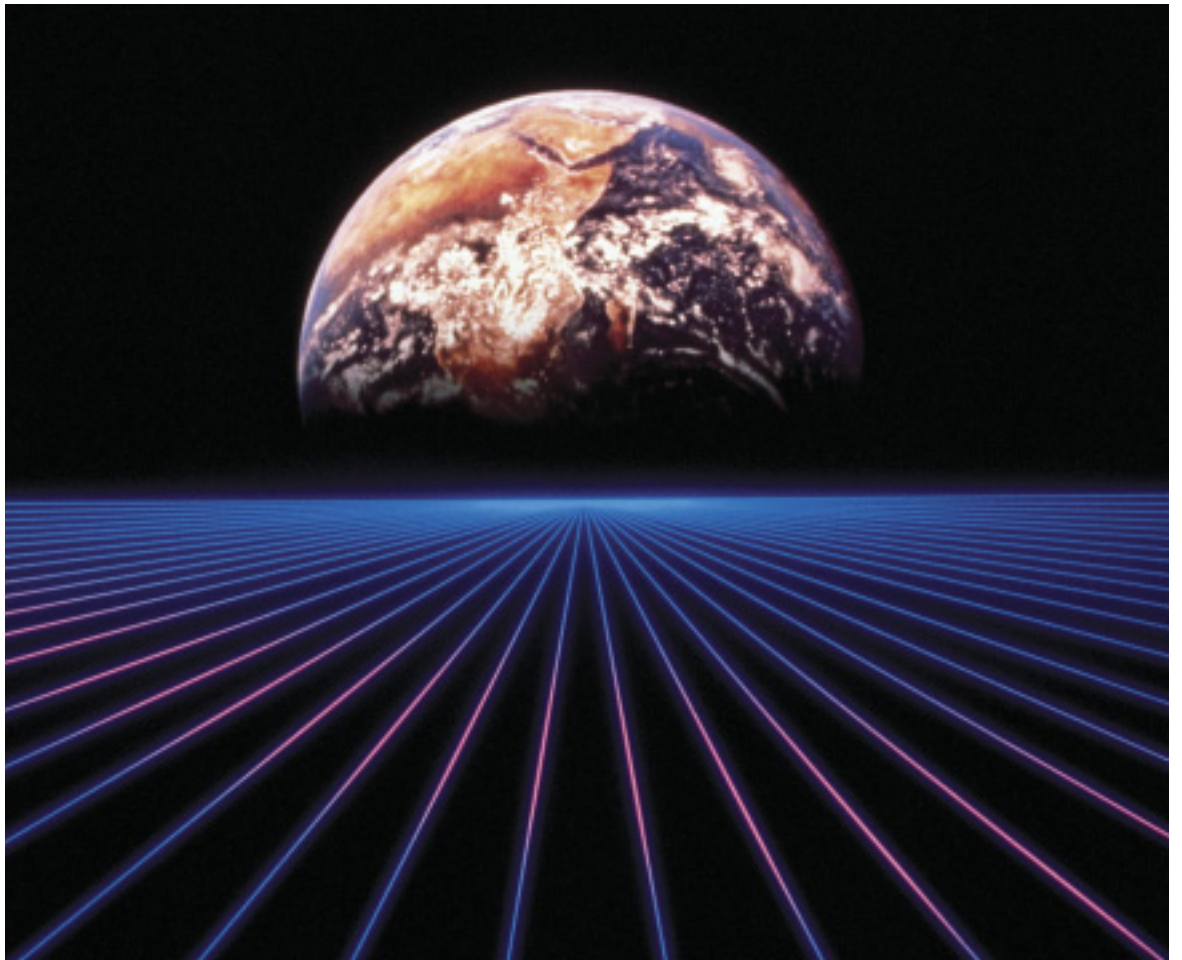


# **Business 2010: The public sector** Embracing the challenge of change



A report from the Economist Intelligence Unit  
sponsored by SAP



## Preface

*Business 2010: The public sector* is an Economist Intelligence Unit white paper, sponsored by SAP.

The Economist Intelligence Unit bears sole responsibility for the content of this report. The Economist Intelligence Unit's editorial team conducted the interviews, executed the survey and wrote the report. The findings and views expressed in this report do not necessarily reflect the views of the sponsor.

Our research drew on two main initiatives:

- We conducted a wide-ranging survey of 776 senior public-sector executives from November 2004 through January 2005, using both telephone and online surveying techniques. This was part of a global survey, *Business 2010*, conducted by the Economist Intelligence Unit, in which 4,018 private- and public-sector executives took part across 23 countries.
- To supplement the survey results, we also conducted in-depth interviews with several senior public-sector executives.

The author of the report was Jeanette Borzo, and the editor was Andrew Palmer. Mike Kenny was responsible for design and layout.

Our sincere thanks go to the interviewees and survey participants for sharing their insights on this topic.

April 2005





## Executive summary

Public-sector management is in flux, thanks to the increasingly rapid pace of social, political, and technical change. Economic crises, privatisation, budget cuts, the continuing evolution of e-government and increasing scrutiny from citizens mean that the public-sector organisations of the future will need to be more citizen-focused, more business-like and smarter in their use of technology. That is the message of a major new Economist Intelligence Unit research programme, sponsored by SAP, into the public-sector landscape of 2010.

Based on a survey of hundreds of executives worldwide and in-depth interviews with leading decision-makers around the globe, the research finds a convergence of forces that will spur public-sector organisations to reform over the coming five years. The attributes of the leading public-sector organisation of 2010 will include the following:

### The *Business 2010* survey

This report is based on an extensive research programme conducted by the Economist Intelligence Unit from November 2004 through January 2005. At its core was the *Business 2010* survey, in which a total of 4,018 executives from around the world participated, including 776 from the public sector. By 'public sector,' we mean public administration (such as a national institute of health), government offices (be they part of city, state, regional, national or international governments) and public service providers (such as transportation authorities).

The survey included 23 countries in Europe, the Asia-Pacific region and the Americas. Our survey sample was not only international, but also very senior. A fifth of respondents were their organisation's main decision makers with another two-fifths being among their organisation's main decision makers. Fully 50% of respondents were director-level and 20% were manager level. Half of respondents were in public administration, with 44% in public services.

● **Adaptability.** Asked to identify the greatest challenge they faced to achieve their mission, survey respondents chose swift adaptability to change above all others. Flexibility will be needed in a number of areas, from the expansion of service delivery channels, to changes in internal working practices based on technological developments, to partnerships with private-sector organisations. Changing *how* organisations are run will be as, if not more, important than *what* they do. A majority of executives believe that new business models will offer a greater advantage to their organisation than the addition of new services and delivery channels over the coming five years. Similarly, quality enhancement is a higher strategic priority for executives than expansion of services, channels and market coverage.

● **Citizen-focused employees and processes.** Citizens and businesses will become increasingly demanding over the next five years as consumers of public services. A large majority of survey respondents anticipates that they will expect greater personalisation, faster and more accurate service fulfilment and more proactive communication, without paying more or sacrificing quality enhancements. Organisations will respond with streamlined delivery channels, more training in citizen-facing skills and more cost-efficient processes.

● **Commitment to transparency.** "Today there is a greater requirement for transparency," says Kathleen Kendrick, director of the Office of Performance, Accountability, Resources and Technology in the US Agency for Healthcare Research and Quality (AHRQ). Citizens expect more information both on the services they consume and on the value for money they get for their tax bill. Expect much more information to be made available directly to citizens and much more



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hard-headed qualification and monitoring of public investment projects.

● **Attention to the business case.** In this context, the use of business cases will become increasingly common in public-sector organisations to justify investments. Financial return-on-investment (ROI) will be an important criterion used for this purpose. Survey respondents expect to measure both financial and social ROI in the coming five years—and to make that ROI transparent to citizens and stakeholders.

● **Openness to private-sector practices and partners.** In 2010, agencies and administrations must work to bottom-line objectives, whatever the processes may be. Bureaucrats are on their way out as problem-solving officials are rising to the top. Organisations must coordinate efforts not only with other public offices, but also with private-sector companies when their expertise is needed. “It’s the changing nature of the world,” says Gilman Louie,

president and chief executive officer of In-Q-Tel Inc., the venture capital arm of the US Central Intelligence Agency. “You can’t take three or four years to get it right anymore. Government is now beginning to realise that it is no longer a 9-to-5 world.”

Technology will be instrumental in helping organisations to meet their strategic goals for 2010. According to our survey, most organisations (67%) will adopt new technologies primarily to improve service quality, while a third of organisations will use technology to expand either the number of constituents receiving their services and/or the channels through which a service is delivered. Whatever its purpose, central to the value that IT will bring will be its capacity to improve the flow, speed and accuracy of information, whether aimed directly at the citizen or internal management. Over the course of the next five years, stressing the “information” in IT will be the hallmark of the successful public-sector organisation.



## Introduction: Building on decades of changes

**P**ublic-sector strategies for the coming five years will be evolutionary, not revolutionary. Fully two-thirds of survey respondents are focused on improving the quality of their existing services rather than expanding their service and channel offering.

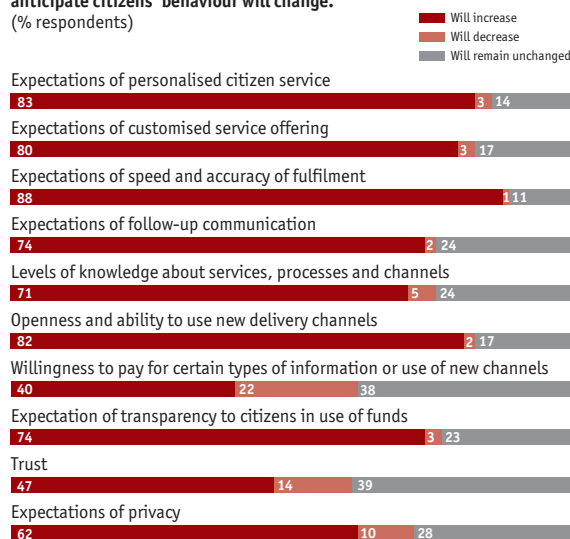
Future reforms will build on principles of increased efficiency that have defined public-sector trends in a host of countries for more than two decades. From the shift away from the guaranteed-job status common in bureaucracies to the introduction of pay-for-performance models, stereotypical public-sector roles are already changing. "There is a beginning of a reformation for civil servants," says Bernd-Wolfgang Weismann, head of the Information Society Policy division in Germany's Federal Ministry of Economics and Labour in Berlin. That process will continue between now and 2010.

### Vive les citoyens

Public-sector organisations can nevertheless expect no respite from the forces of change over the coming five years, in large part because they are operating under the increasingly watchful and demanding eye of the taxpayer. "There is a transparency today that never existed before, especially in government," says Mr Louie of In-Q-Tel Inc. Citizens will more closely scrutinise public-sector results and expect more efficient governance and management: 76% of survey takers agree that the importance of governance issues will increase significantly at their organisation by 2010.

As consumers of public services, too, citizens' expectations are changing. UK Prime Minister Tony Blair expressed it well in a 2001 speech: "Expectations have risen enormously ... Unlike 1945, people don't put up with the basics. In a consumer age, they expect quality, choice and standards." Indeed, citizens will increasingly expect service parity with the private sector. In our survey, 88% of executives predict that citizen expectations for the speed and accuracy of service

**How will your organisation's customers (citizens) change between now and 2010? For each of the attributes below, please indicate how you anticipate citizens' behaviour will change.**  
(% respondents)



Source: Economist Intelligence Unit survey, 2005

fulfilment will increase in the coming five years.

According to respondents, rising citizen expectations will be the factor that has the greatest impact on organisations between 2005 and 2010, closely followed by technology innovation. Both have the effect of enfranchising the citizen. "Currently representative assemblies give the people control over the government in an indirect democracy model, but with the spread of IT, it is possible for citizens to control the administration more directly," says Hiroshi Morimoto, chief of general administration and department promotion in Japan's Tottori Prefecture.

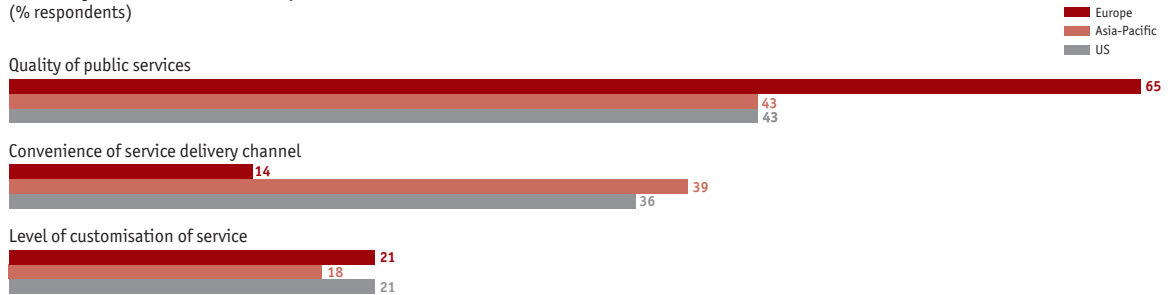
Given greater control, what will citizens be looking for from service providers? 57% of survey respondents say that the quality of public services will be most important to citizens in 2010, compared with 23% who select the convenience of a service's delivery channel and 20% who pick out levels of service customisation. Public-sector managers in Mexico (75%) and Brazil (73%) as well as in Europe as a whole (65%) are



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Which do you believe will be most important to citizens in 2010?  
(% respondents)



Source: Economist Intelligence Unit survey, 2005

strongly convinced that customers will demand quality above all, whereas those in developed Asia-Pacific countries such as Australia and South Korea believe it will be convenience of delivery channels that will be key (50% and 45%, respectively).

In practice, of course, these attributes are not mutually exclusive. Take Japan, where the highest proportion of respondents (48%) say that convenience of service delivery channels will be most important to its citizens. "Convenience is vital," says Ichiro Terabayashi, manager of the Management Planning Department, Information Aid Policy division in Japan's Toyama Prefecture. "How can you have a 'quality' product that isn't convenient?"

To help satisfy citizens' demands, executives intend to invest more in training to enhance employees' citizen-facing skills and to re-engineer processes so they become more cost-efficient. Many identify technology as a critical enabler of change. Among the ways in which respondents expect IT to help improve citizen relationships, ensuring greater access to public information is seen as the most critical. In the past, public-sector interaction with citizens often meant no more than the publication of a thick report that rarely left the public-library reference shelf. Today, the public sector is offering citizens real-time interaction and access to data on everything from the latest transport

strikes in France to the newest discoveries on Mars. The Internet "is a very popular way for us to interact with the public," says Dr David Korsmeyer, Chief of the Intelligent Systems Division at the NASA Ames Research Center in Mountain View, California. "Now, very high-value data and information is available and presented to the public very rapidly. And not just to the US community but to the world community."

Streamlining and expanding service-delivery channels and enabling service customisation are also picked out as areas in which technology can have a vital impact. Many such e-government initiatives are already underway. At Directgov.uk, citizens can do anything from schedule a driving test to finding a job or renewing a passport. Spain, Australia, Malaysia, Thailand and other nations have issued health "smartcards" with a chip that contains patient information, helping to eliminate paper forms and service delays. In the coming five years, Mr Morimoto of Japan's Tottori Prefecture expects his government to "include public opinion in government planning or to develop a system which includes citizens in the planning body."

Use of technology will inform another significant priority for the public-sector organisation of 2010—cost control. "Quality-improvement is the priority for us in utilising IT," says Mr Terabayashi. But "obviously,



one of the benefits of technology is that it can be very cost efficient". Governments save money and time, for example, when citizens file taxes online rather than mailing in a paper form that a government employee must then key into the revenue system. "Citizen self-service is a strong focus in a lot of governments—you get the citizens to do the work," says Amy Santenello, a senior research analyst in government strategies at US-based Meta Group. "You're able to offload a lot of work and don't have to fill those positions."

Interestingly, US executives are far more concerned about securing new funds and using technology to cut costs than just about any other nationality. Some attribute this to the US's historically big budgets. Now that fiscal reform is underway, the American public sector is feeling the pinch. "I don't think the US has been pressed enough to optimise what it already has," says Mr Louie. Cost control also figures prominently among the top public-sector management challenges in Europe—notably in the UK, Finland, Sweden and Poland.



## The human resource challenge

Of course, technology is only as smart as the organisation that uses it. Alongside interaction with citizens, how organisations use IT and how people work under the influence of new technologies will be two of the biggest changes in how public-sector organisations operate in 2010, according to the Economist Intelligence Unit survey. Executives expect that adapting their workforce to rapid technology change over the coming five years will be their greatest HR management challenge, followed by overcoming cultural resistance to organisational change.

Others are more sanguine. "IT will help us cut down on the numbers of offices around the country, which will make management much easier," says Mr Terabayashi of Japan's Toyama Prefecture. "I think we'll also perhaps see a trend to more people working

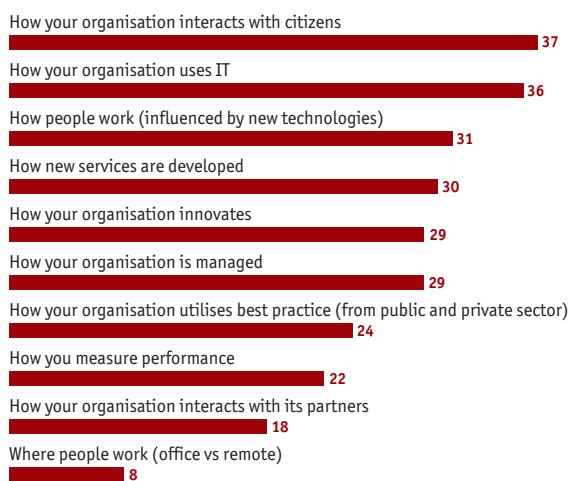
at home and being able to work out of the office, say while on trips. Certainly with regards to our operations I foresee this happening within the next five years."

For some organisations, a leadership void will pose an additional HR challenge. 72% of survey takers think a lack of leadership at senior-management levels will greatly hinder real innovation in public services. In our interviews, many executives also voiced concern about the pending retirement rush: the so-called "baby boom" generation, born after World War II, is already eligible for retirement in many countries and public-sector workers are generally top-heavy with older employees.

Indeed, some organisations are already working hard on succession planning to capture and manage the knowledge of their experienced officials before they stop working. "As our senior people get ready to retire, institutionalising [our] knowledge gets more critical," says Kathleen Kendrick, director of the Office of Performance, Accountability, Resources and Technology in the US Agency for Healthcare Research and Quality (AHRQ).

To get the most from IT, however, the public sector will also need to consider the younger generation. Today's IT plans and buying decisions need to take younger workers into account. Younger workers coming into the workforce are more technologically savvy, and expect to have working environments that leverage technology and keep their skills current. Mr Louis recommends "reaching down" into the younger generation of public-sector employees to say "tell us how you want to work. Senior folks need to engage with the work force. Put [younger employees] on the IT design teams."

**What will change most about the way your organisation operates over the next 5 years? Please select no more than three**  
(% respondents)



Source: Economist Intelligence Unit survey, 2005



## Great expectations

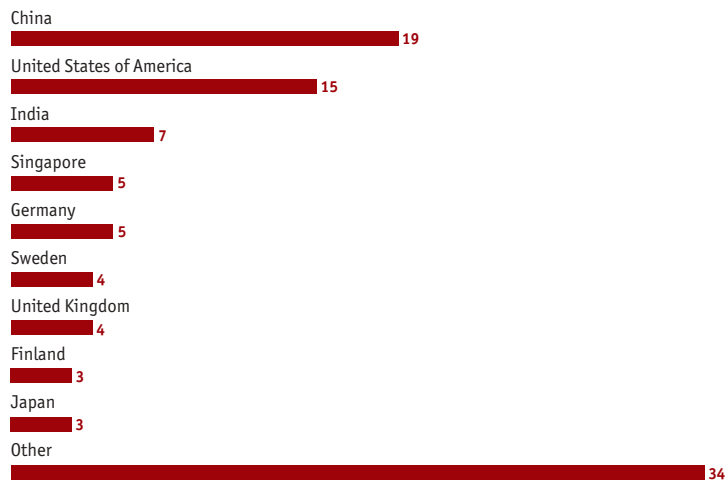
Public-sector expectations, naturally, vary from region to region. China, for example, is the country that most survey takers (19%) expect to achieve the greatest improvement in public services and their delivery through e-government over the next five years. "We can see China is only in the initial stages of offering government services via the Web," says Ichiro Terabayashi, manager of the Management Planning Department, Information Aid Policy division in Toyama Prefecture in Japan. "Now that they have started down that road they can only improve." Certainly China will need to expand its e-government offerings as the number of Internet users in China expands from less than 10% of the population in 2004.

Second to China in the league table of countries expected to improve most, but at a very different level of development, is the US. When considering their own global standing, only 38% of respondents

think their country's progress is more advanced than that of North America's. Others are determined to bridge the gap. "We are still behind the US, but we've made a lot of progress" in e-government, says

Bernd-Wolfgang Weismann, head of the Information Society Policy division in Germany's Federal Ministry of Economics and Labour in Berlin. "E-government is one of the key issues for the EU."

**Which country do you think is likely to achieve the greatest improvement in public services and their delivery through e-government over the next five years?**  
(% respondents)



Source: Economist Intelligence Unit survey, 2005



## Lessons from the private sector

**A**s public-sector organisations transform their delivery channels and working practices while seeking to satisfy greater demands for transparency and cost-efficiency, many will turn to the private sector for inspiration. “It’s helpful for governments to understand some things industry has had to understand, in order to gain their efficiencies,” says NASA’s Dr Korsmeyer. Public-sector executives in countries such as Finland, Denmark, Sweden, Malaysia, Mexico and the US say that borrowing best practice from the private sector is among the top three ways that their organisations will change between now and 2010. In Brazil, the majority of respondents, 60%, say it will represent the single largest change in their organisations.

In-Q-Tel, for example, runs its operations against qualitative and quantitative metrics much as corporations do. “We talk about our goals every single month,” says Mr Louie, adding that In-Q-Tel reports on those goals to its Board of Trustees. “The goals push people to the next level.” Some countries are more receptive to the idea of performance measurement than others, however. More than a third of UK survey-takers rank performance measurement among the top three areas in which IT can make a critical difference, for example, whereas only 15% of respondents in

Russia, 12% in Hong Kong and 11% in Finland do.

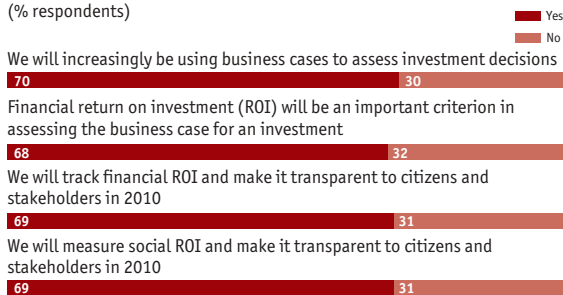
Consensus is greater around the use of business cases to assess investment decisions in 2010. Increasingly, financial return-on-investment (ROI) will be an important criterion in assessing investments, 68% of the survey takers said, while 69% expect to measure both financial and social ROI in the coming five years—and to make that ROI transparent to citizens and stakeholders.

Globally, public-sector managers in the US and Asia-Pacific are the most confident of using financial ROI in 2010: 79% and 75%, respectively, say it will become an important criterion in assessing business cases. Asia-Pacific respondents also appear the most enthusiastic about using social ROI—72% expect to be measuring it in 2010—and Europeans only slightly less so (67%). By comparison, US respondents appear relatively cool toward social ROI, with 57% saying they expect to be capturing it in 2010.

In-Q-Tel numbers among the majority in this area. “We try to quantify the social ROI,” says Mr Louie of In-Q-Tel’s approach. “We have our own internal metrics focused on how many technologies are being used by the community.” At NASA as well, the posting of project information to public sites has helped the space agency better gauge social ROI. When citizens log on to receive data on a space mission, for example, “it validates that value” to citizens, says Dr Korsmeyer. “It’s the stockholder effect.”

The concept of political ROI is also likely to come into greater use in the public sectors of the world’s more mature democracies. A common definition is yet to be acknowledged, but political ROI will represent some measure of the political outcome of a public-sector initiative or investment programme. In other words, What effect will a given programme have on a government’s or politician’s re-election prospects? How will the public perceive the results of the

Please indicate whether you agree with the following statements about how public-sector investment decisions will be made and tracked in 2010 (% respondents)



Source: Economist Intelligence Unit survey, 2005



## Investment intelligence

To see how the private sector is influencing its counterparts in the public sector, look no further than In-Q-Tel. Having witnessed the success that companies such as Intel and Motorola had with their venture capital groups, the US's Central Intelligence Agency decided in the 1990s to try its hand at venture capital.

Much like Motorola Ventures and Intel Capital, the CIA's In-Q-Tel scouts and backs talented technology, picking some of the best new security-related products for the US intelligence community. The investments can offer not only a financial return for public-sector

coffers, but also promising new technologies.

"Our core mission is to be an innovator and catalyst, to help agencies innovate themselves," says Gilman Louie, president and chief executive officer of In-Q-Tel Inc. Founded in 1999, In-Q-Tel does this with a staff of business-savvy executives. Mr Louie, for example, came from the interactive entertainment industry and years of experience in mergers and acquisitions, financing arrangements, public markets, licensing deals and the development of award-winning products and technologies.

"When In-Q-Tel got started, Congress had independent business people look at the model. It asked 'Is this thing going to work?'" Mr Louie recalls. "The access to people who think differently is critical. You can have the best team in the world but you need an outside voice." More than three-quarters of the companies that In-Q-Tel works with have never done business with the government before. So while the venture capital group is serving public-sector goals, it is doing it with a foot in the private-sector camp. Expect to see more of this type of model in the next five years.

initiative?

As well as borrowing practices from the private sector, many public-sector organisations will go a step further. A quarter of survey respondents think that increasing partnerships with and support from the private sector will have a large impact on their organisations in 2010. "We are seeing more public-private partnerships," says AHRQ's Ms Kendrick. Often, the private sector needs to tap AHRQ's intellectual capital, for example, and so together "we design the project and move forward together." In Germany, Initiative D21—the country's largest public-private partnership—has brought together more than 400 representatives of enterprises, associations, parties, political institutions and other organisations under the patronage of Chancellor Gerhard Schröder.

Collaboration within the public sector will be

another significant area of focus. "Agencies are being forced to collaborate with one another. It's a huge challenge but IT is making it possible," says Ms Santenello of Meta Group. "The biggest change we'll see (in the coming five years) is how technology changes the organisational structure of government for greater collaboration among local, state and federal governments."

Central to this effort, and to many of the strategic aims of the 2010 organisation, will be the flow of accurate and timely information within, across and beyond organisations. For a majority of public-sector managers—56% of our survey group—IT's top governance job will be delivering critical information in a timely manner. "That's the most important thing," says In-Q-Tel's Mr Louie. "It's getting the right information at the right time to the right person."



## Conclusion: Preparing for 2010

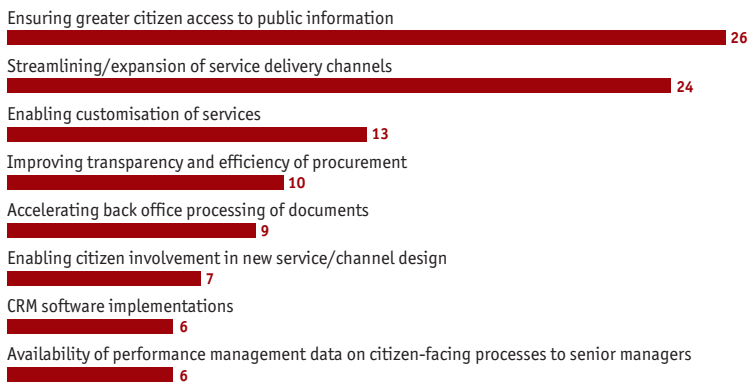
“It is an exciting time to be a public-sector manager—you can use creativity to get good value for your dollar,” says Ms Kendrick at AHRQ, who has worked in the public sector since 1988. New trends towards accountability and payment-for-performance “really give you the opportunity to push, so you get a lot of

return on your investment. The times are changing. Public-sector managers do have to think differently.”

Bold use of technology will be essential as organisations focus on improving the way they are run and the quality of their services. Continually challenged by modest budgets and the accelerating pace of change, the public sector will turn to technology to foster collaboration, satisfy citizens’ demands for improved service delivery and meet growing expectations of transparency—80% of executives expect technology to be critical to their organisation’s ability to achieve its mission in 2010.

Vision and leadership will also be critical. “Pressing ahead with reforms is of great importance,” says Mr Morimoto of Japan’s Tottori Prefecture. “There are some painful reforms ahead. Leadership will be a necessity.” But executives are at least aware of the journey they must undertake between now and 2010. “In the past ten years, there were still some bumps in the road,” says Mr Weismann in Berlin. “But now I am more optimistic for the future.”

**What are the most critical ways over the next five years in which IT can facilitate the improvement of citizen relationships?**  
(% respondents)



Source: Economist Intelligence Unit survey, 2005

# Appendix: Public-sector survey results

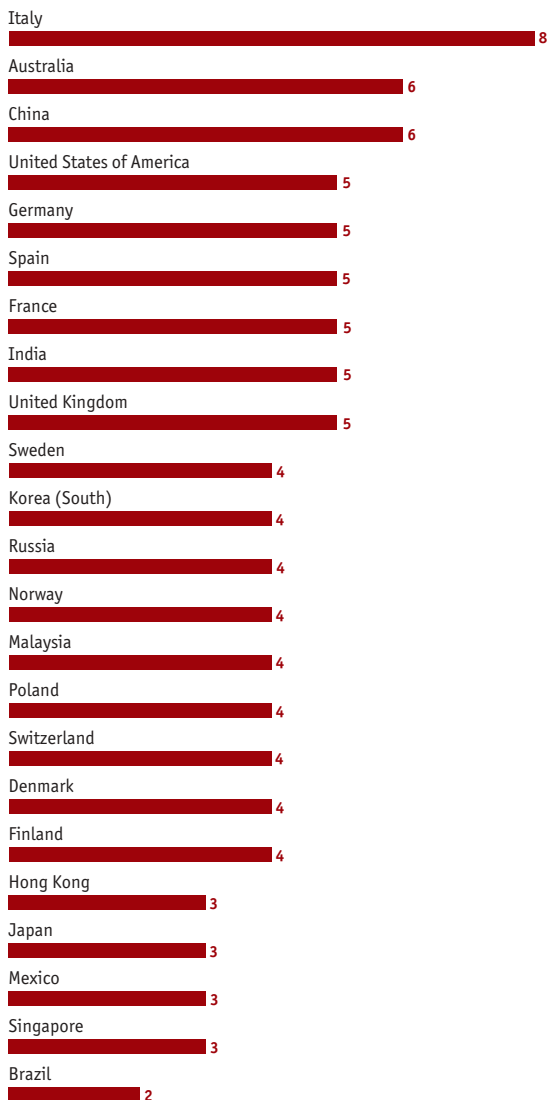
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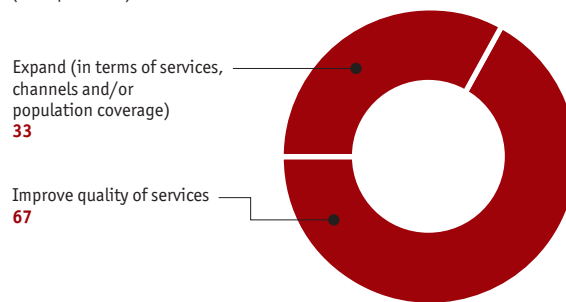
everyone who took part.

Please note that not all answers add up to 100%, because of rounding or because respondents were able to provide multiple answers to some questions.

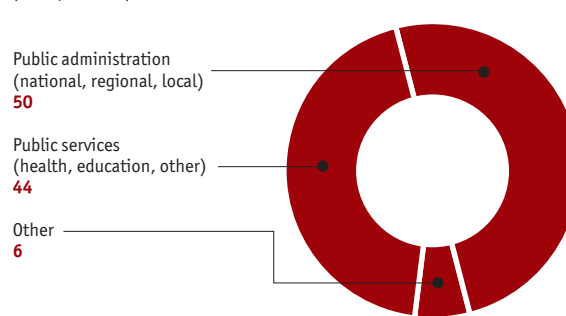
## In which country are you located? (% respondents)



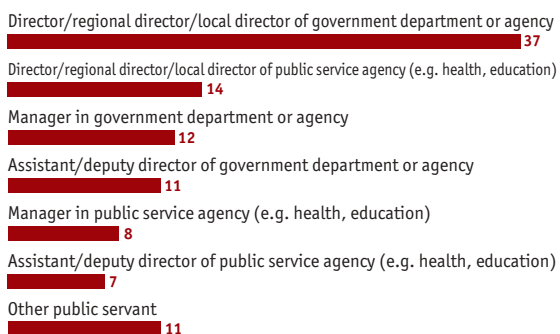
## Which of the following better reflects your strategy between now and 2010? (% respondents)



## In which sector does your organisation belong? (% respondents)



## Which of the following best describes your job? (% respondents)

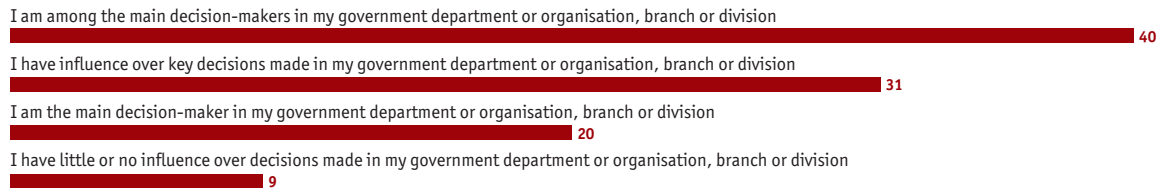


## Appendix: Public-sector survey results

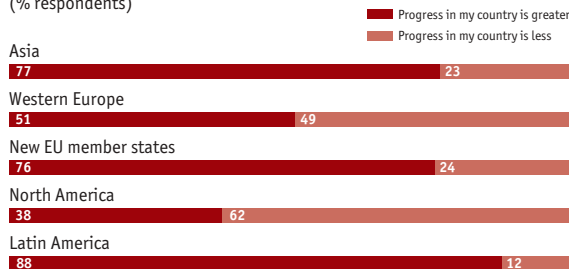
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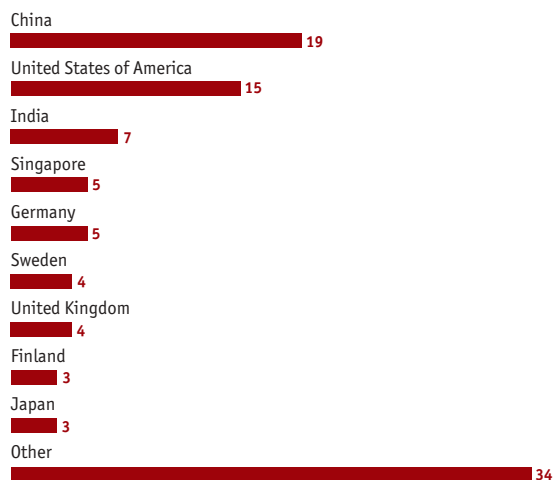
### What level of involvement do you presently have in decision-making within your company? (% respondents)



### How do you rate your country's progress in implementing e-government policies and services compared to other countries in the following regions? (% respondents)



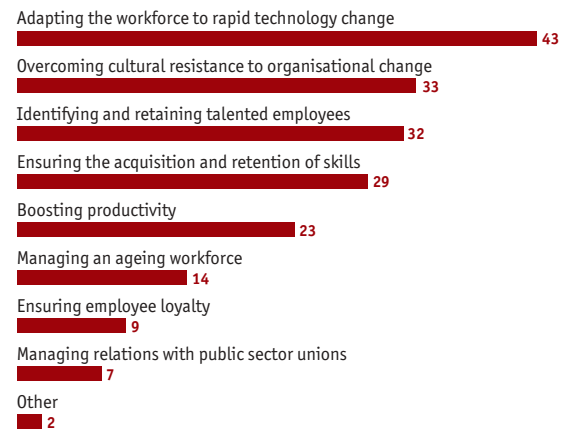
### Which country do you think is likely to achieve the greatest improvement in public services and their delivery through e-government over the next five years? (% respondents)



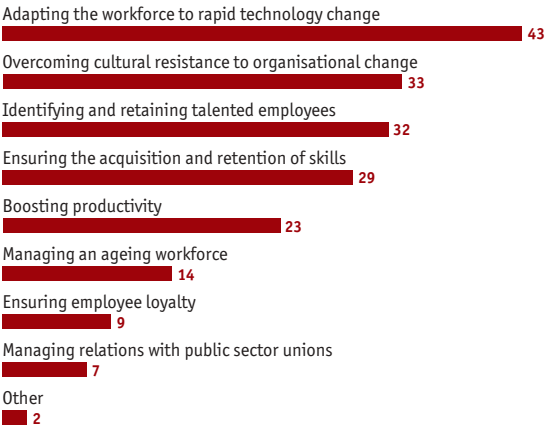
### In your organisation, which of the following presents the greatest management challenge for creating long-term value? Please rank in order, with 1 being the greatest challenge (% respondents)

Challenge	1	2	3
Swift adaptability to change	25	17	11
Speed of innovation	9	13	10
Cost control	14	14	15
Improving customer (citizen) relationships	14	13	12
Securing and managing funding	10	8	9
Managing partnerships	4	5	7
Adapting new technology	6	8	13
Human resource management	10	12	14
Meeting governance/regulatory requirements	8	9	8

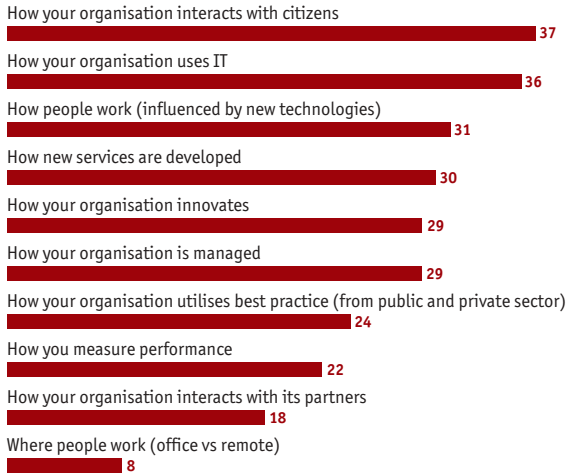
### What are the biggest human resource management challenges your organisation will face between now and 2010? Please select no more than two (% respondents)



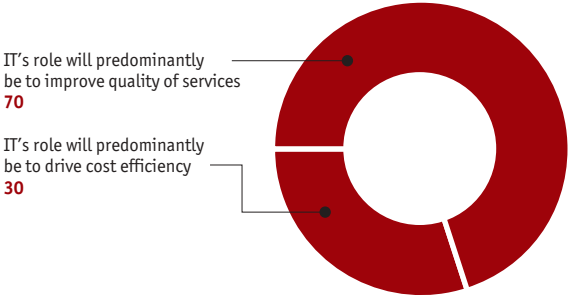
**What are the biggest human resource management challenges your organisation will face between now and 2010?**  
 Please select no more than two  
 (% respondents)



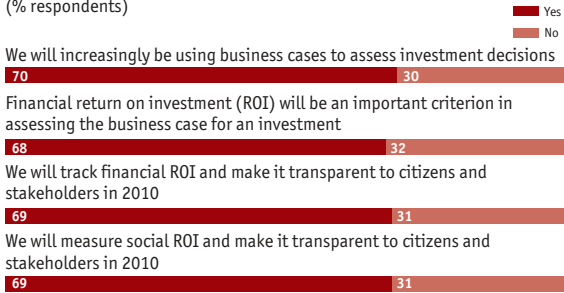
**What will change most about the way your organisation operates over the next 5 years? Please select no more than three**  
 (% respondents)



**Which of the following statements best reflects your view of the role of information technology in achieving your organisation's mission over the next five years?**  
 (% respondents)

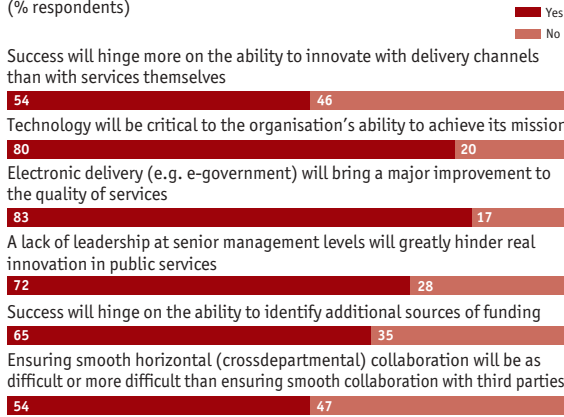


**Please indicate whether you agree with the following statements about how public sector investment decisions will be made and tracked in 2010**  
 (% respondents)

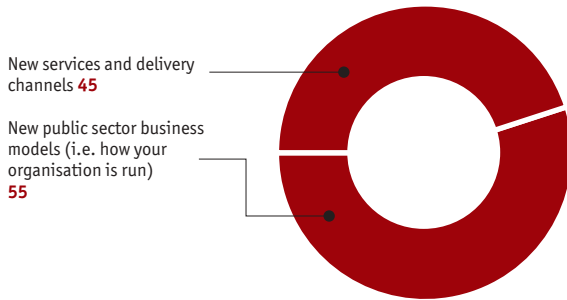


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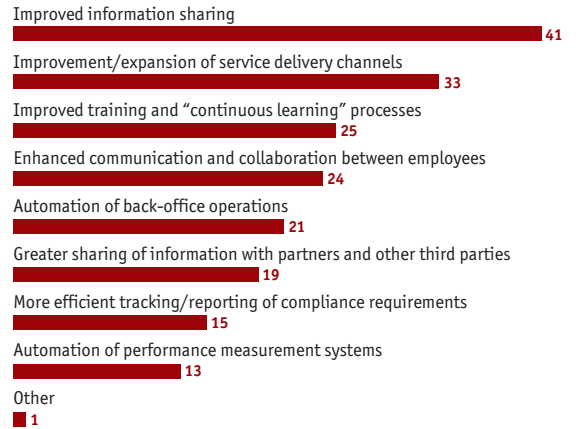
**Please indicate whether you agree with the following statements about public sector strategy implementation in 2010**  
 (% respondents)



**Which of the following will be the greater source of advantage for your organisation between now and 2010 in achieving its mission?**  
 (% respondents)



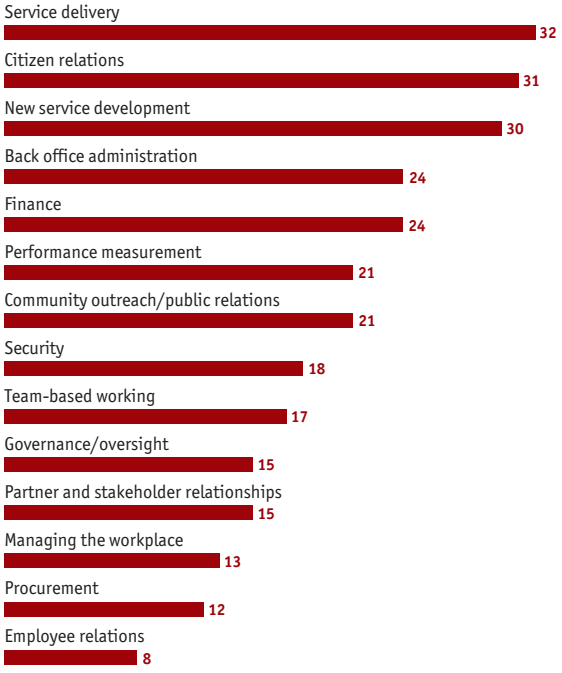
**In which areas of public service innovation do you expect information technology to have the greatest impact over the next five years? Please select no more than two**  
 (% respondents)



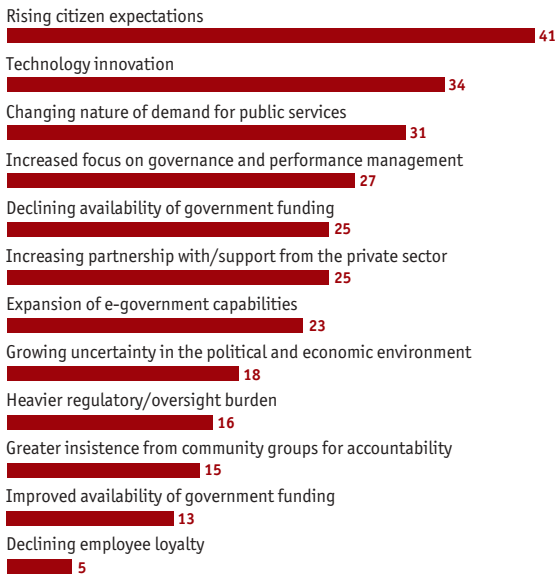
**Please indicate whether you agree with the following statements about governance in 2010**  
 (% respondents)



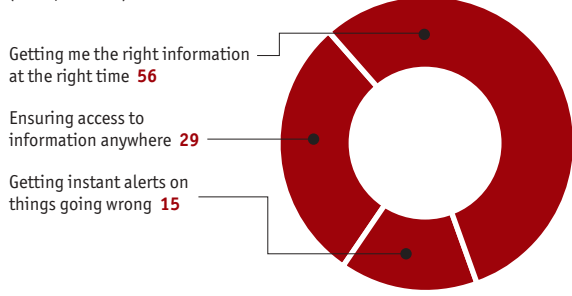
**In which of the following areas of your operations will IT be most critical in 2010? Please check three only**  
 (% respondents)



**In your view, which of the following developments will have the greatest impact on your organisation between 2005 and 2010? Please select no more than three**  
 (% respondents)



**What should IT most improve upon by 2010 to help you make better management decisions?**  
 (% respondents)

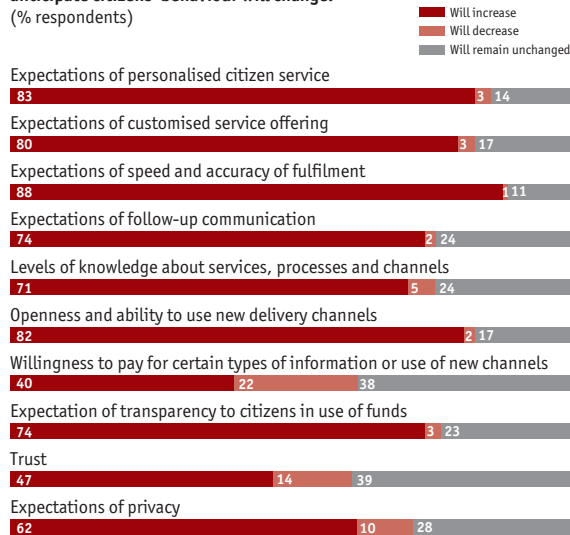


## Appendix: Public-sector survey results

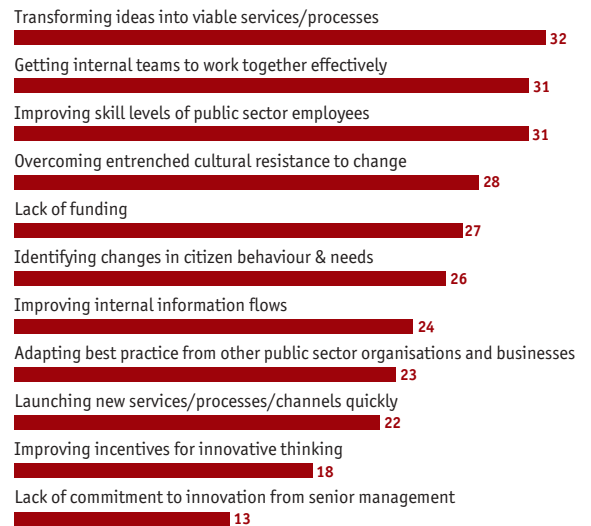
Business 2010: The public sector

Embracing the challenge of change

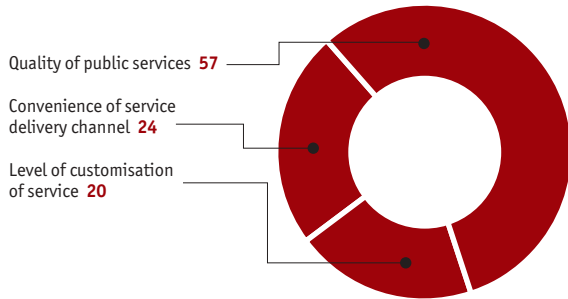
**How will your organisation's customers (citizens) change between now and 2010? For each of the attributes below, please indicate how you anticipate citizens' behaviour will change.**  
(% respondents)



**Which of the following will be the most significant challenges your organisation will face over the next five years when it comes to innovation? Please select no more than three**  
(% respondents)



**Which do you believe will be most important to citizens in 2010?**  
 (% respondents)



**In view of changing customer expectations, what will be the most critical ways over the next five years in which IT can facilitate the improvement of citizen relationships? Please rank in order, with 1 being the most critical**  
 (% respondents)

	1	2	3
Streamlining/expansion of service delivery channels	24	16	16
Ensuring greater citizen access to public information	26	24	14
Enabling customisation of services	13	14	18
CRM software implementations	6	7	5
Enabling citizen involvement in new service/channel design	7	12	12
Availability of performance management data on citizen-facing processes to senior managers	6	7	9
Accelerating back office processing of documents	9	9	13
Improving transparency and efficiency of procurement	10	11	12

**In light of changing citizen expectations between now and 2010, what do you envisage will be your organisation's critical priorities over the next five years? Please check three only**  
 (% respondents)



Whilst every effort has been taken to verify the accuracy of this information, neither The Economist Intelligence Unit Ltd. nor the sponsors of this report can accept any responsibility or liability for reliance by any person on this white paper or any of the information, opinions or conclusions set out in the white paper.

LONDON  
15 Regent Street  
London  
SW1Y 4LR  
United Kingdom  
Tel: (44.20) 7830 1000  
Fax: (44.20) 7499 9767  
E-mail: london@eiu.com

NEW YORK  
111 West 57th Street  
New York  
NY 10019  
United States  
Tel: (1.212) 554 0600  
Fax: (1.212) 586 1181/2  
E-mail: newyork@eiu.com

HONG KONG  
60/F, Central Plaza  
18 Harbour Road  
Wanchai  
Hong Kong  
Tel: (852) 2585 3888  
Fax: (852) 2802 7638  
E-mail: hongkong@eiu.com