

Sicherheit in Technik und Chemie

2022

# Digitalization in Conformity Assessment in the Netherlands

A QI-FoKuS study

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# A Study conducted within the framework of the QI-FoKuS initiative




Basic statistical population for the survey	668 accredited conformity assessment bodies (CABs) in the Netherlands
Data collection method	Online survey
Survey period	January 24, 2022 February 14, 2022
Sample	75 fully completed questionnaires (= 11% response rate)



**QI-FoKuS**  
Research on Conformity Assessment and Safety

## Digitalization in Conformity Assessment

Online Survey



Supported by



The digital transformation of the economy as well as increasingly networked and complex products and applications are bringing digitalization into the focus of conformity assessment bodies (CABs). Innovations, new technologies and processes rely on corresponding conformity assessment services. This poses new challenges for testing and calibration laboratories, inspection and certification bodies, and other CABs. At the same time, however, new digital technologies and applications also offer new opportunities. This study is the first to comprehensively explore "Digitalization in Conformity Assessment" building on data from an online survey of accredited CABs in the Netherlands.

## Major topic areas covered

### Digital Maturity Level

- Assessment of the digital maturity of the CABs in the Netherlands based on a tailored digital maturity model

### Drivers, Benefits and Barriers

- What motivates CABs to transform digitally, what impact do they experience, and what hurdles must be overcome

### Technology Trends

- Assessment of the digital technologies and applications currently in use (now and in a 5-year perspective)

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# The Sample

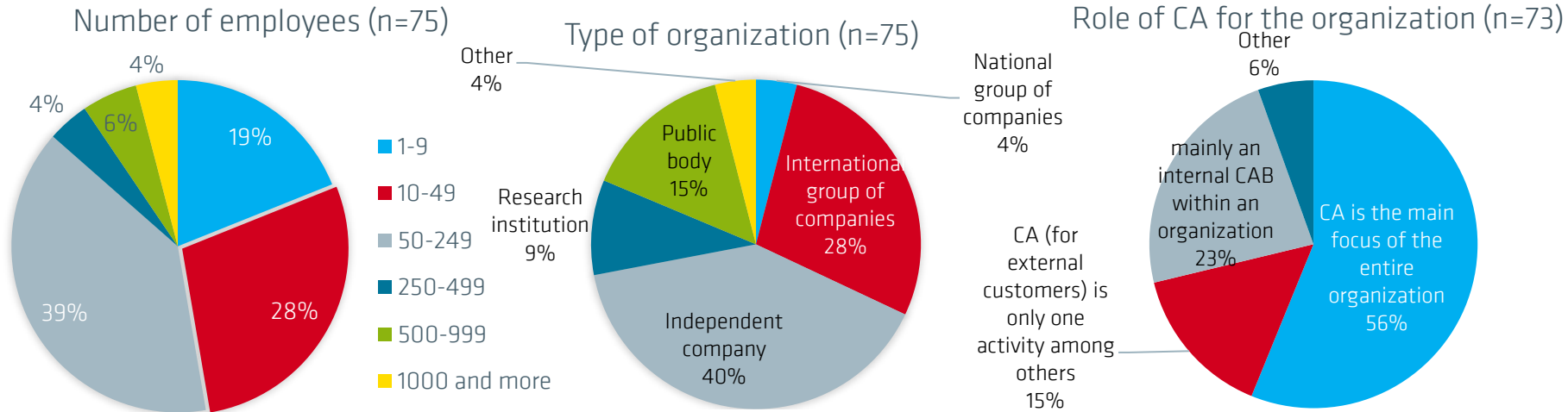
General information about the participating  
Conformity Assessment Bodies

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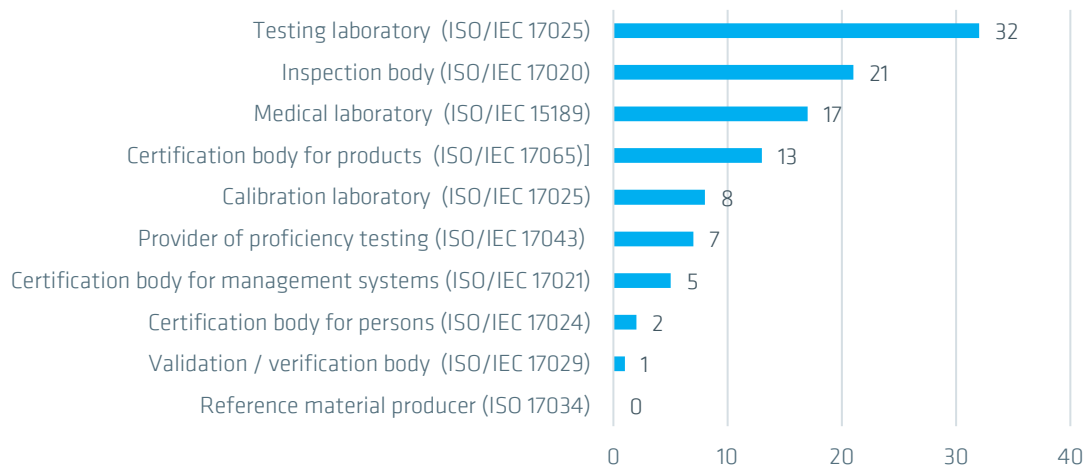
# 75 conformity assessment bodies (CAB) in the Netherlands participated in the survey

- 47% of participating CABs are **small businesses** with less than 50 employees
- 40% are **independent companies**, 28% belong to an **international group** and 15% are a **public body**
- For 56%, Conformity Assessment (CA) is the main economic **focus of activity**, 23% are an **internal CAB** of a higher-level organization

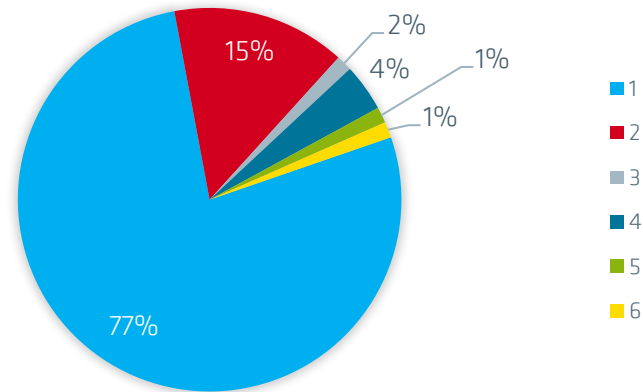


# The 75 participating CABs are active in (almost) all fields of conformity assessment

Field of activity



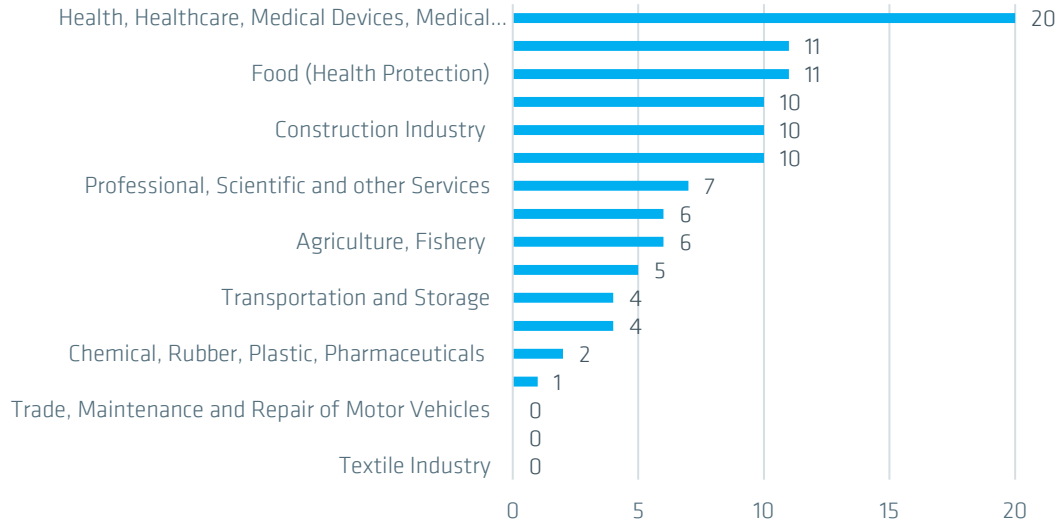
Number of fields of CA activities per CAB



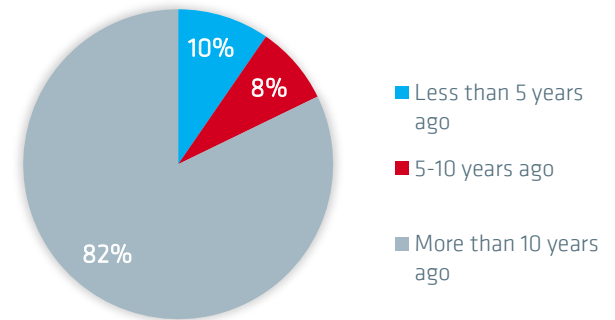
- Testing laboratories represent the **largest group of participants**, followed by inspection bodies and medical laboratories
- 77% of CABs **specialize** in a single field of activity in conformity assessment; only a few cover a broad range of fields of activity (up to 6)

# The CABs serve a wide range of industries // mostly established on the market for a long time

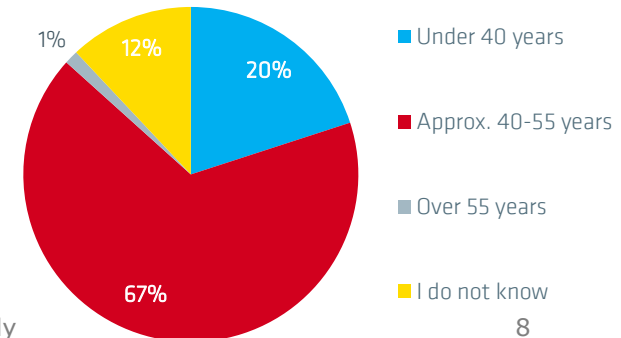
Main sectors served by the CABs



Establishment of the CAB (n=75)



Average age of employees (n=75)



- The customers served by CABs are mainly from the **health sector**, but also the food sector is important
- 82% of CABs were **established** more than 10 years ago
- While the **average age of the employees** is between 40 and 55 years in 67% of the CABs, it is below 40 years in one out of five CABs



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# Digitalization in Dutch CABs A General Overview

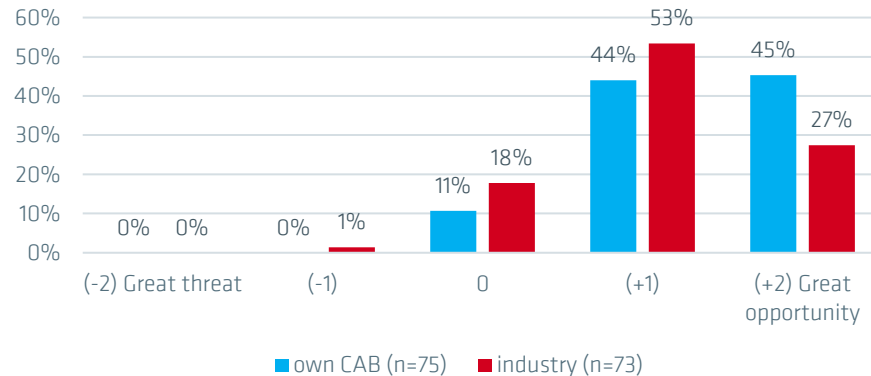
This section covers how the participating CABs perceive digitalization for their organization (now and in perspective) and how they self-evaluate their current state of digital transformation.

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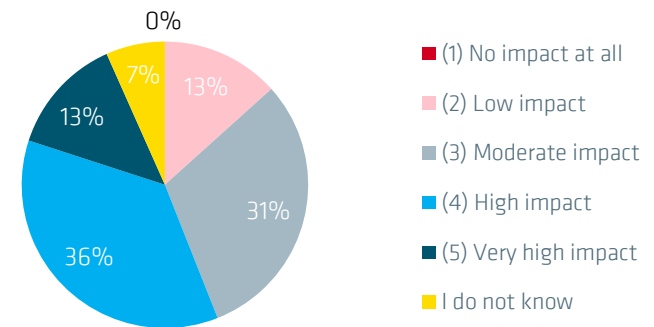
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# Digitalization more of an opportunity rather than a threat // Major influence expected

For the CAB itself and the whole industry, digitalization is viewed rather as...



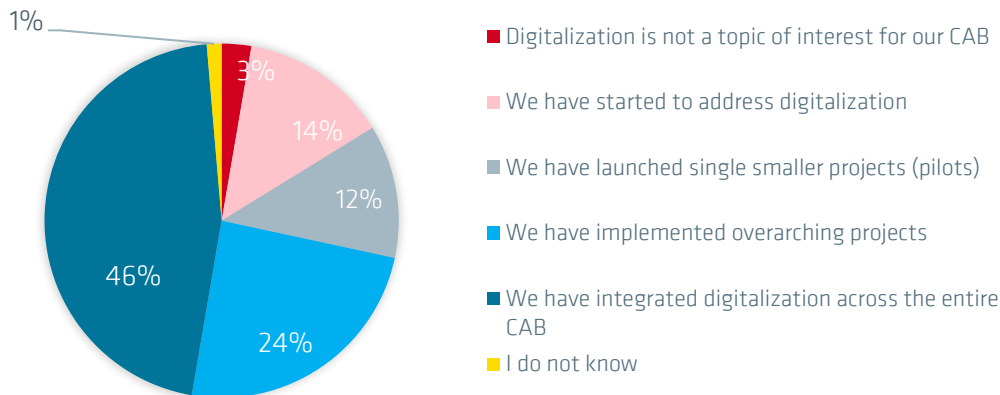
Expected impact of digitalization in the next 5-10 years (n=75)



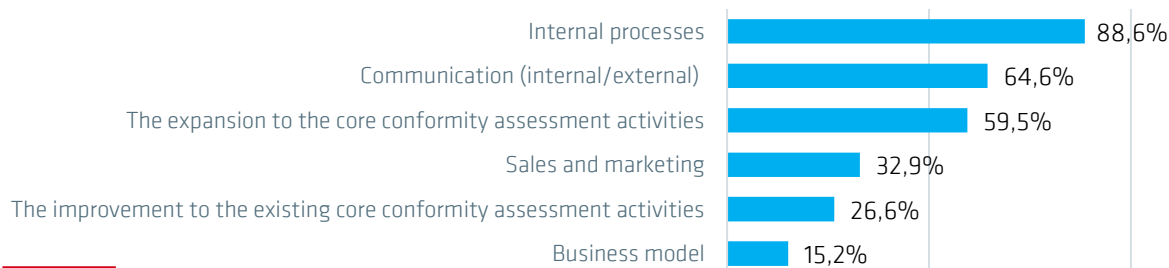
- In general, CABs have a **positive perception** of digitalization: 89% of the surveyed CABs recognize digitalization as an opportunity or even a great opportunity rather than a threat for their own organization, and 90% with regard to the whole CA industry
- 49% of the participants expect digitalization to have a **great or even very great impact on CA activities** in the next 5-10 years

# Different status of digitalization // Focus mainly on internal processes

Status and extent of digitalization in the CABs (n=74)



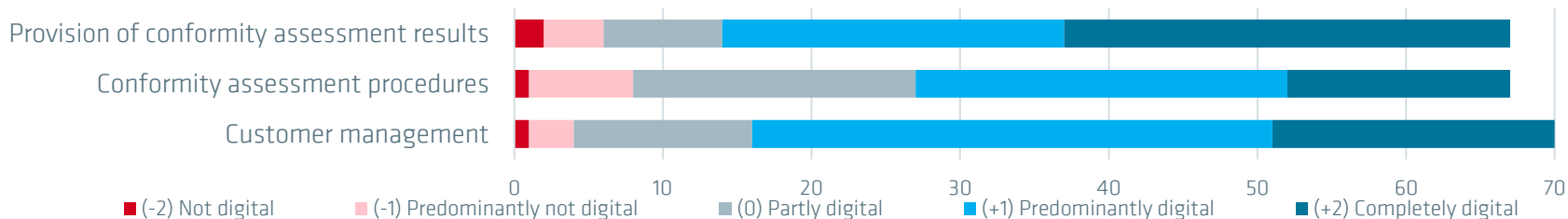
Areas targeted by digitalization (multiple answers possible)



- **The status of digitalization is quite divers** among the CABs in the Netherlands: While 14% of the CABs have just started to address this topic, another 12% have launched single smaller projects and 24% have already implemented overarching projects. A high share (46%) state that they have integrated digitalization throughout the whole organization.
- Most **digitalization activities concern internal processes**. Yet communication and expansion to the core CA activities are also relevant areas. However, digitalization is currently rarely used to improve CA services or even less to adopt new business models.

# Positive self-assessment of digitalization in core areas - and in comparison with stakeholders

Self-evaluation of the CABs' status of digitalization in different areas (n=73)

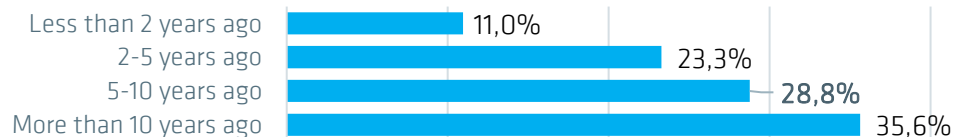


- The CA results are provided predominantly or completely digitally by the majority of CABs. The CA processes themselves are less frequently digitalized.
- Compared to **other organizations** that are direct stakeholders, CABs rate their digital status on average, at least as good or even better, especially with regard to the accreditation body and direct competitors.
- Digitalization has not been a topic for long: every third CAB **has only started to deal with it** during the last 5 years. 36% have already done so at least 10 years ago.

Own status of digitalization compared to... (n=68)  
(on a scale of (-2 much worse) to (+2 much better))



CABs started to deal with digitalization... (n=73)



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## Digital Maturity of CABs

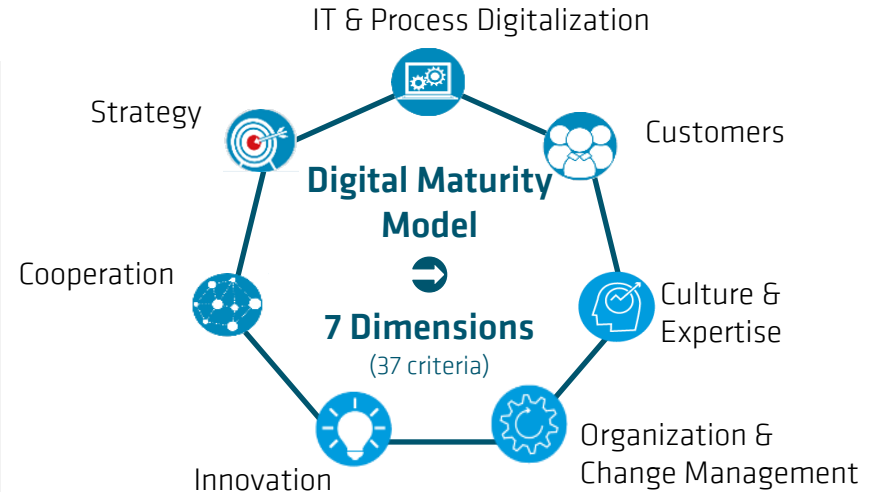
The "digital maturity" of an organization describes its status in the digital transformation. Digital maturity models use predefined dimensions and criteria to assess the ability of organizations to cope with the digital transformation. The following chapter presents the results for CABs in the Netherlands based on a model developed specifically for this study.

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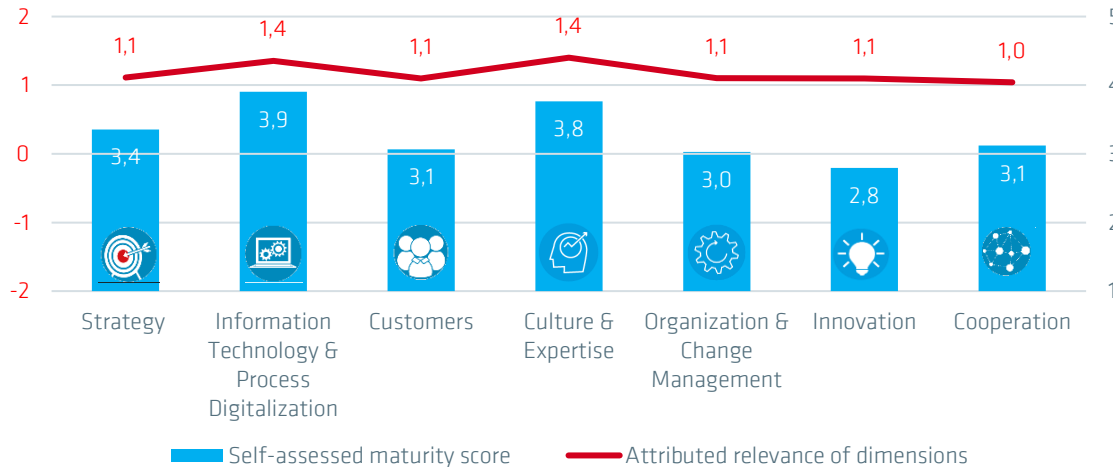
# The digital maturity model for the conformity assessment industry

- The digital maturity level reflects the status of digital transformation of an organization and includes technical as well as organizational and strategic aspects.
- Becoming a digitally mature organization requires efforts, **capabilities** and **resources** across many areas.
- These are mapped in a maturity model using various **dimensions** and **criteria**:
  - Our specially developed model takes into account 7 dimensions that are essential for the digital transformation of CABs: from technological to strategic and organizational to cultural aspects.
  - Each dimension is operationalized by 4 to 6 criteria describing basic success factors in terms of capabilities, capacities, and resources.
- By means of a self-assessment of the participating CABs along these criteria, an individual digital maturity level is calculated - from level 1 ("beginner") to level 5 ("expert").



# Maturity very different in the dimensions: Technology advanced, organization not yet

Self-assessed performance in the digital maturity dimensions



\* The CABs were asked to self-evaluate their maturity/performance along statements in 7 topic areas (dimensions) on a scale from 1 (I do not agree at all) to 5 (I fully agree). These statements and dimensions are displayed in detail in the annex.

The participants were then asked to rate the importance of each dimension with regard to a successful digital transformation on a scale from -2 (not important at all) to +2 (very important).

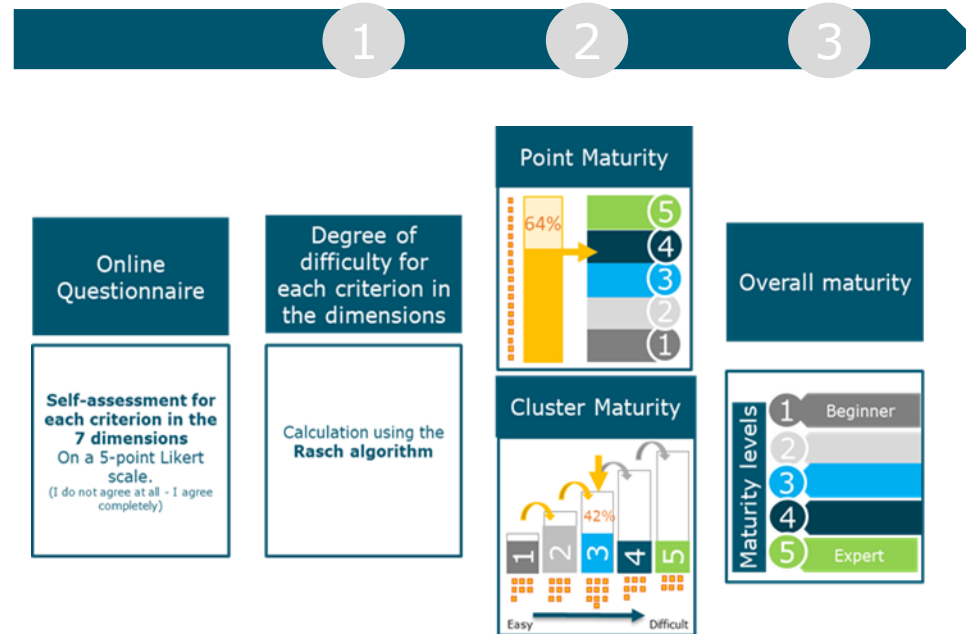
- The results of the maturity model show that the status of the CAB slightly differs in the various dimensions:
  - The CABs consider themselves to be **most advanced** in the area of "IT & Process Digitization" and "Culture and Expertise", followed by "Strategy".
  - The **greatest need** to catch up is in the areas of "Innovation" and "Organization and Change Management" - although the respondents are actually aware of their high relevance.
- This **pattern is typical**: Digital transformation in organizations starts with the introduction of technologies and develops into an implicit holistic organizational transformation.

⇒ *Details on the composition and partial results in the individual dimensions can be found in the appendix.*

# Background information: Calculation of the digital maturity level

In the questionnaire, participants indicate the extent to which each of the criteria of the 7 dimensions applies to their CAB. In a **multi-stage process**, digital maturity is determined on the basis of these assessments:

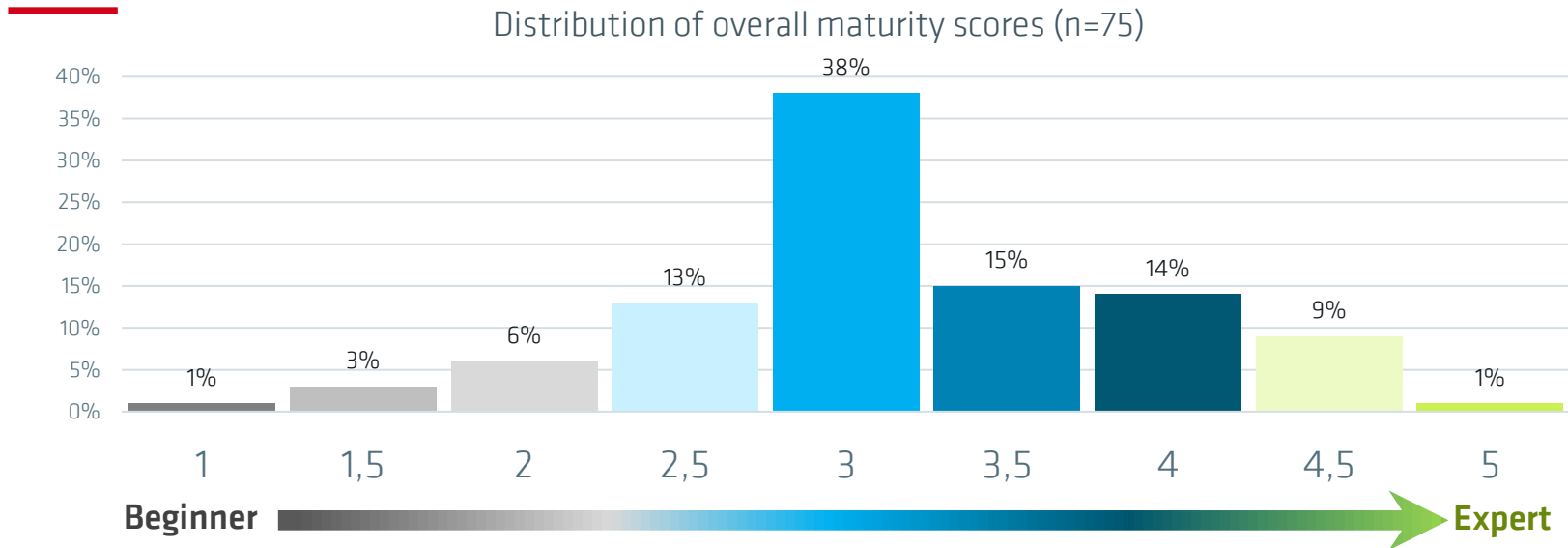
1. For each criterion, the Rasch algorithm is first used to calculate how difficult it is to achieve a good result for it (**degree of difficulty**). If, on average, a large number of participants state that they can meet this criterion, it is classified as easy to achieve.
2. Based on this, 2 types of maturity levels are determined: **Cluster analysis** is used to divide the indicators into 5 sequential maturity clusters (1 = easiest indicators; 5 = most difficult). To reach a higher maturity, the thresholds of the lower maturity levels have to be met first. In addition, the **point maturity** is calculated: Here, the points achieved count in comparison to the possible total points.
3. The **overall digital maturity score** is the average of the cluster and point maturity scores.



*The calculation is based on the method of the St. Gallen Maturity Model. See Back & Berghaus (2016). Digital Maturity & Transformation Study; Berghaus & Back (2016). Stages in Digital Business Transformation; and Friedel & Back (2012). Determination of enterprise 2.0 development levels with a maturity model.*



# Overall Digital Maturity Scores of the Dutch CA industry



The **digital maturity levels** achieved by the 75 participating CABs in the Netherlands follow a right-skewed *normal distribution*:

- Half of the CABs have reached intermediate level 3 or even 3.5. 24% have already reached a higher level of maturity. However, every fourth CAB still is in early stages of transformation (though only 1% is at the absolute beginner level).
- Only 1% of the CABs has reached expert level 5.

# The 5 Digital Maturity stages in Dutch CABs

## Beginner

1

- ✓ Digitalization has central role in strategy
- ✓ Networked processes
- ✓ Openness to change
- ✓ Understanding of the importance of digital transformation

2

- ✓ IT security: awareness and compliance
- ✓ Investments in digital technologies
- ✓ IT usage reliably ensured
- ✓ Digitalized customer interactions
- ✓ Digital activities integrated in core processes
- ✓ Digitalization as a new source of value creation

## Intermediate

3

- ✓ Clear responsibilities for digitization goals
- ✓ Documented digital strategy
- ✓ Knowledge of most important digital technologies
- ✓ Automated routine processes
- ✓ Integrated, digitalized customer care
- ✓ Suitable personnel and know-how
- ✓ Targeted training
- ✓ Exchange with external experts
- ✓ Effective internal collaboration

4

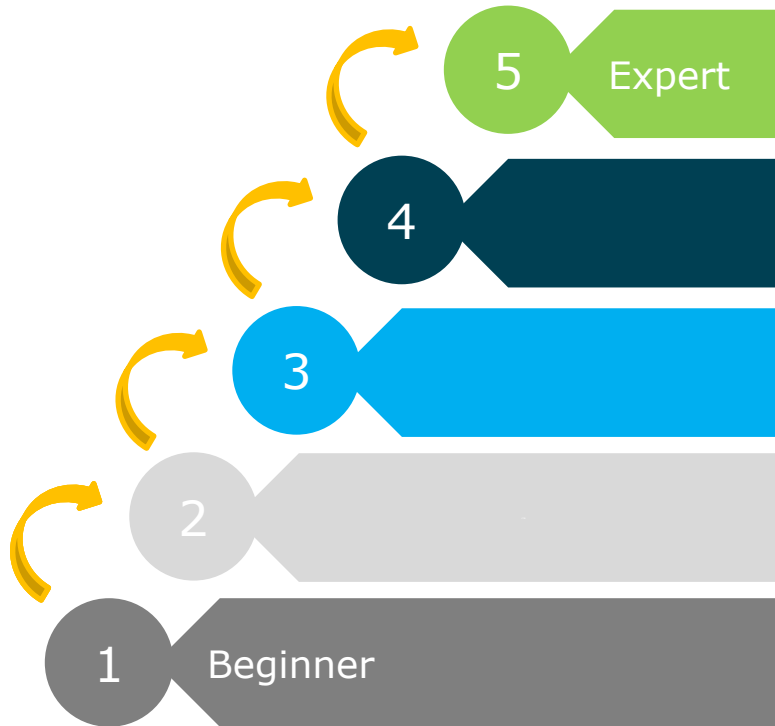
- ✓ Digital Roadmap
- ✓ Evaluation of digital technologies with regard to innovation potential
- ✓ Digital solutions based on customer needs
- ✓ Analysis of customer data
- ✓ Risk of failure is accepted
- ✓ Rapid response to change
- ✓ Sufficient resources to drive digital innovations
- ✓ Defined roles, responsibilities & decision-making processes
- ✓ Measurable goals
- ✓ Competitive advantages through digitalization
- ✓ Driving innovations forward in a targeted manner

## Expert

5

- ✓ Key indicators to measure the implementation of the digital strategy
- ✓ Early warning system to identify relevant digital technologies and business models
- ✓ Customers involved in development of digital innovations
- ✓ Clearly defined innovation process
- ✓ Effective collaboration with external stakeholders
- ✓ Support employees in collaborating effectively
- ✓ Comprehensive partner network for digitalization

# The Digital Maturity of CABs in the Netherlands // Summary of the observed patterns



- Even at the **first maturity level**, digitalization is given a central role in the corporate strategy.
- Organizations at the **second maturity level** have a strong focus on IT, where corresponding investments are made. Importance is given to process digitalization and digitalization is recognized and pursued as a driver for new value creation.
- At **stage three** a documented digital strategy and the necessary personnel skills/competences are available. There is cross-functional and cross-departmental collaboration on this topic.
- In the **fourth maturity stage**, the focus is on organizational adaptation with the definition of responsibilities and allocation of resources. Customer needs and analyses also increasingly come into focus.
- The final **fifth stage** is characterized by intensive collaboration, in particular through the establishment of a targeted partner network and the involvement of customers, as well as clear innovation processes.

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# Motives, Impacts, and Hurdles of Digitalization

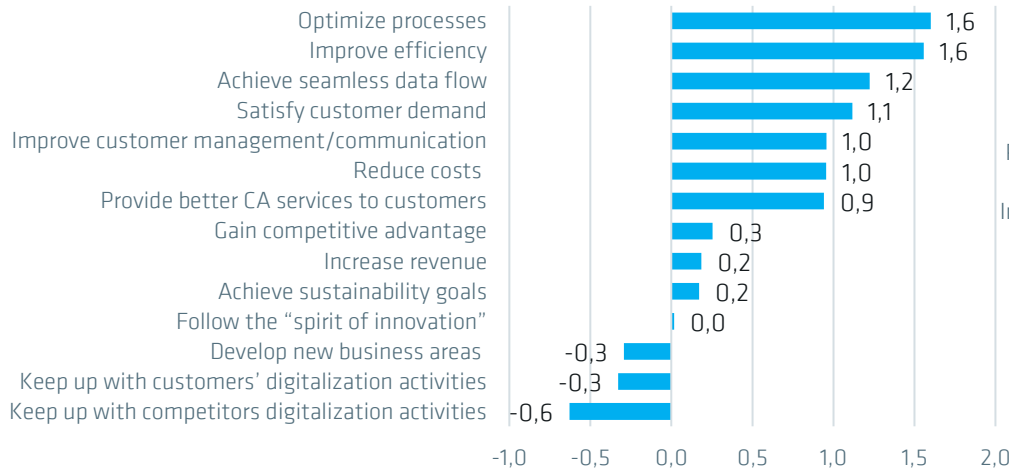
What is driving digitalization in the Dutch CABs? What effects can be achieved for the organizations? Are expectations being met? And what are the biggest hurdles to be overcome in the digital transformation?

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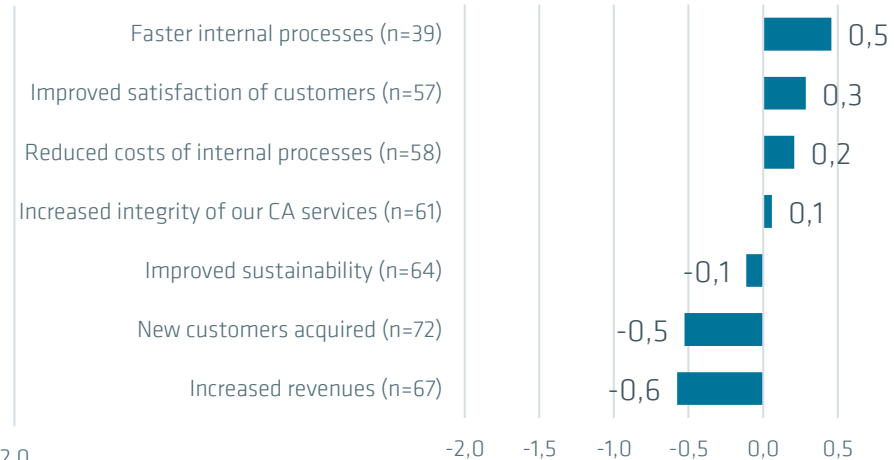
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# Focus on process optimization and efficiency enhancement – partially realized on a large scale

Goals behind the digitalization efforts (n=72)  
(on a scale from (-2) not agree at all to (+2) fully agree)



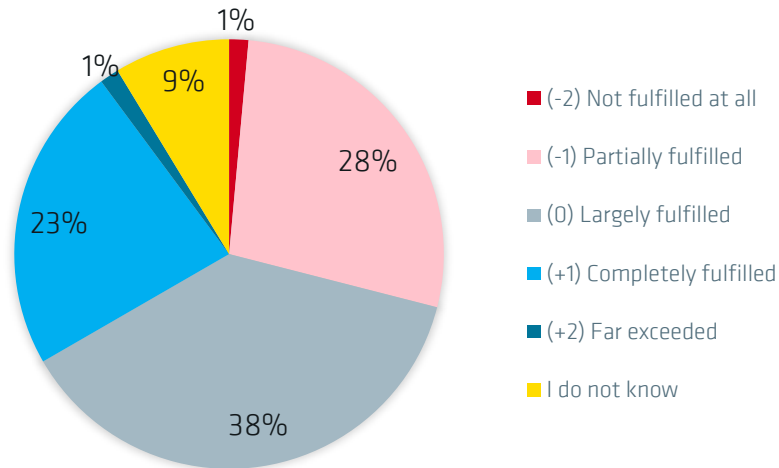
Benefits realized from digitalization (n=71)  
(on a scale from (-2) not agree at all to (+2) fully agree)



- Process optimization and increased efficiency are the **main goals** behind the digitization efforts of CABs in the Netherlands. In fact, "faster internal processes" is considered the greatest and most frequently realized benefit from digitalization.
- Market objectives, such as increased revenues, the development of new business areas and the acquisition of new customers are not drivers and are considered as the least realized impacts.

# CABs' expectations in connection with digitalization are (at least partially) met

Whether expectations behind the introduction of digital processes/technologies have been fulfilled overall so far (n=69)

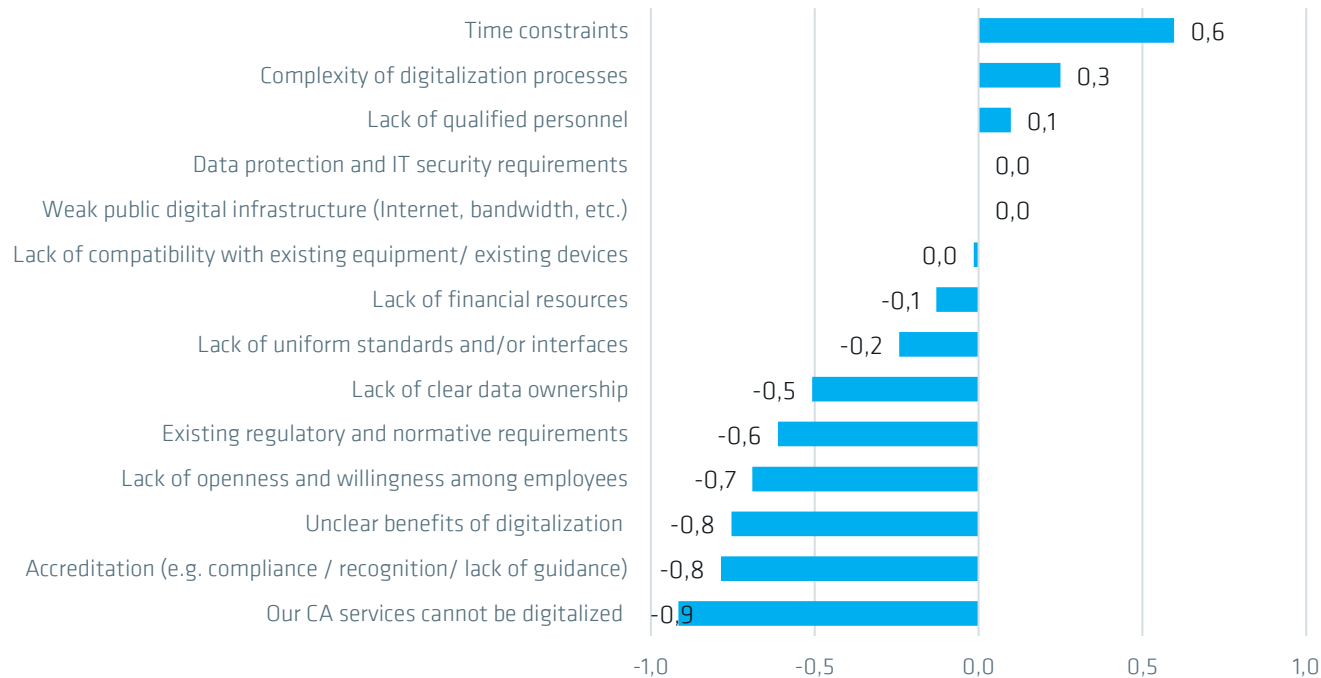


- 62% of the CABs consider their expectations behind the introduction of digital technologies to have been largely or completely fulfilled. Another 28% find them at least partially fulfilled.
- Only for 1% of the CABs the expectations are not fulfilled at all. They, however, are confident to meet the expectations in the short run.

# Lack of time and complexity of the topic are the biggest hurdles to digital transformation

## Hurdles to digital transformation (n=75)

(Scale from (-2) not at all to (+2) very much)



- Time constraints in managing the digital transformation are the biggest hurdles for CABs, followed by the general complexity of this topic.
- While the lack of qualified personnel is an obstacle, lack of openness/ readiness on the part of employees is not.
- Technical aspects such as lack of standards and/or interfaces and lack of compatibility are not an issue for many CABs.

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# Digital Technologies and Trends

This section highlights the actual (or planned) use of concrete digital technologies and applications in the CABs. In addition, the use of remote procedures and technologies is presented.

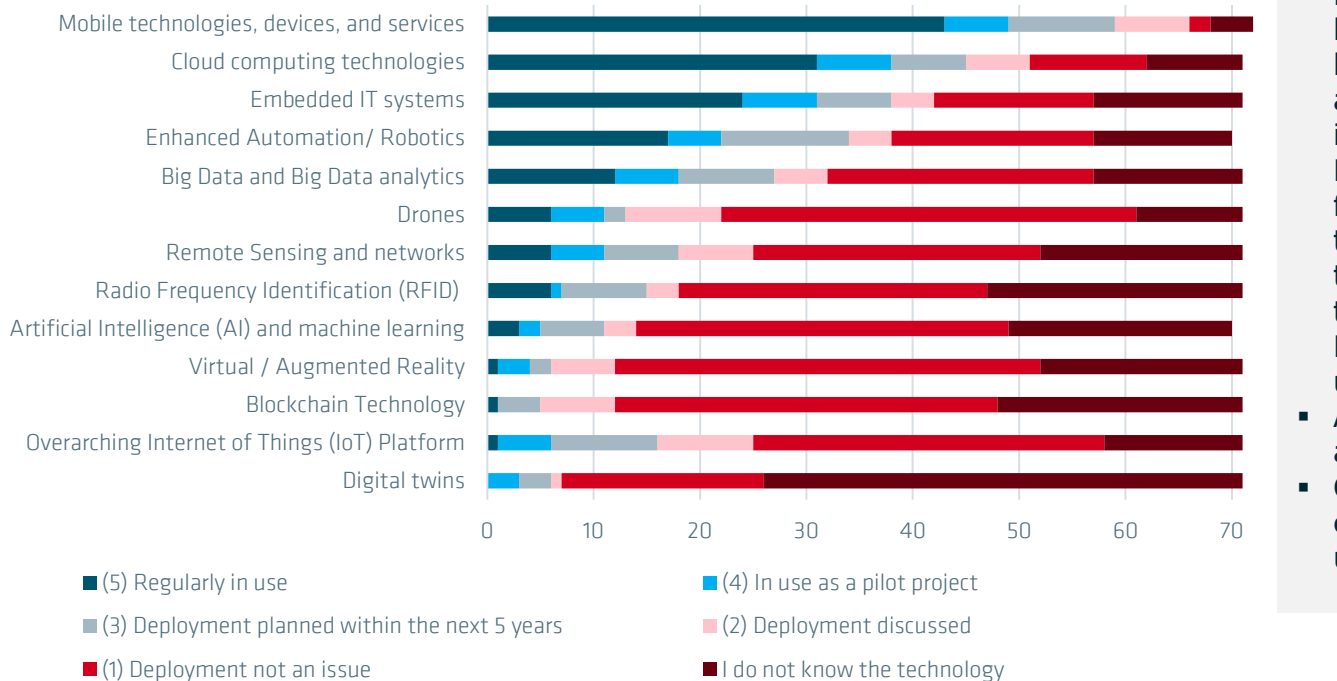
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# Latest digital technologies are not yet widely used in CABs

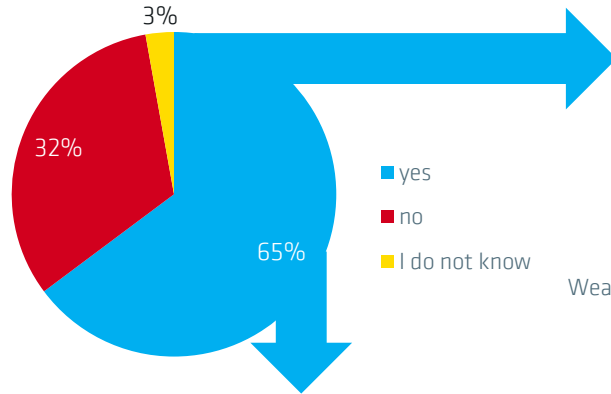
Technologies that are used or planned to be used (n=72)



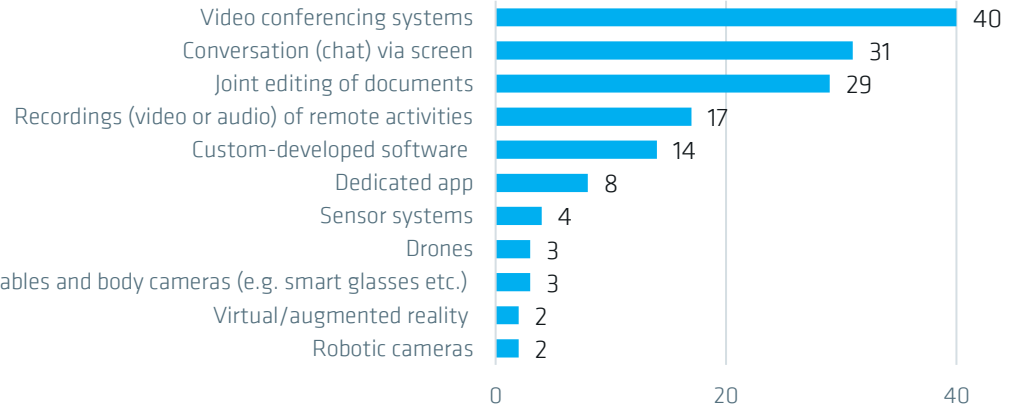
- Everyone is talking about the latest digital technologies such as blockchain, virtual reality and artificial intelligence - but not yet in widespread use by CABs in the Netherlands. Only a few use them for their work. In some cases, they are not even known (Digital twins, for example, mean nothing to every second respondent). Blockchain technologies are unknown to.
- Among CABs, mobile technologies are the most widely used.
- Cloud computing technologies and embedded IT systems are also used.

# Remote methods and technologies are used by most CABs

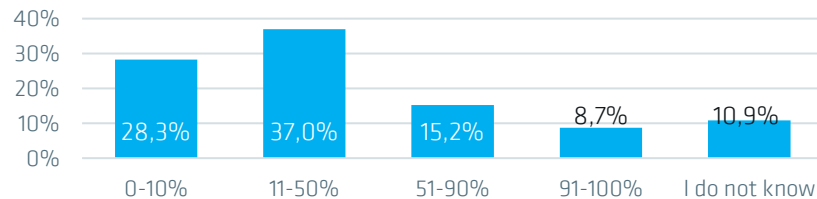
CABs that use remote methods in CA (n=71)



Technologies used for remote procedures (n=46)



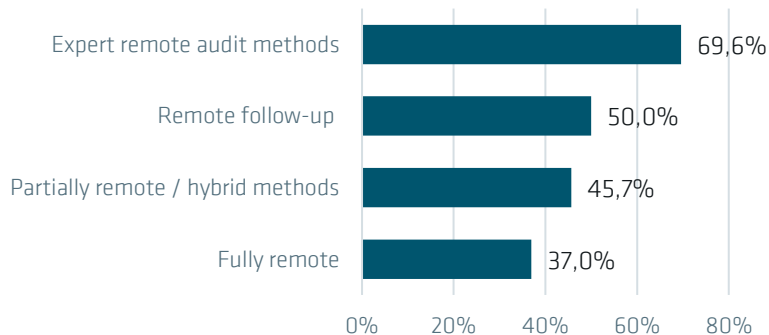
Share of CA services take implemented remotely (n=46)



- Nearly two thirds of the CABs use **remote methods** in their CA activities.
- Very few (9%) have switched completely. Much more often, up to half of all activities are done remotely (61% of CABs). 28% of the CABs have not even reached to perform 10% of activities remotely.
- Video conferencing is the most common used **tool for remote working**, while wearables, virtual reality or robotic cameras are still rarely used.

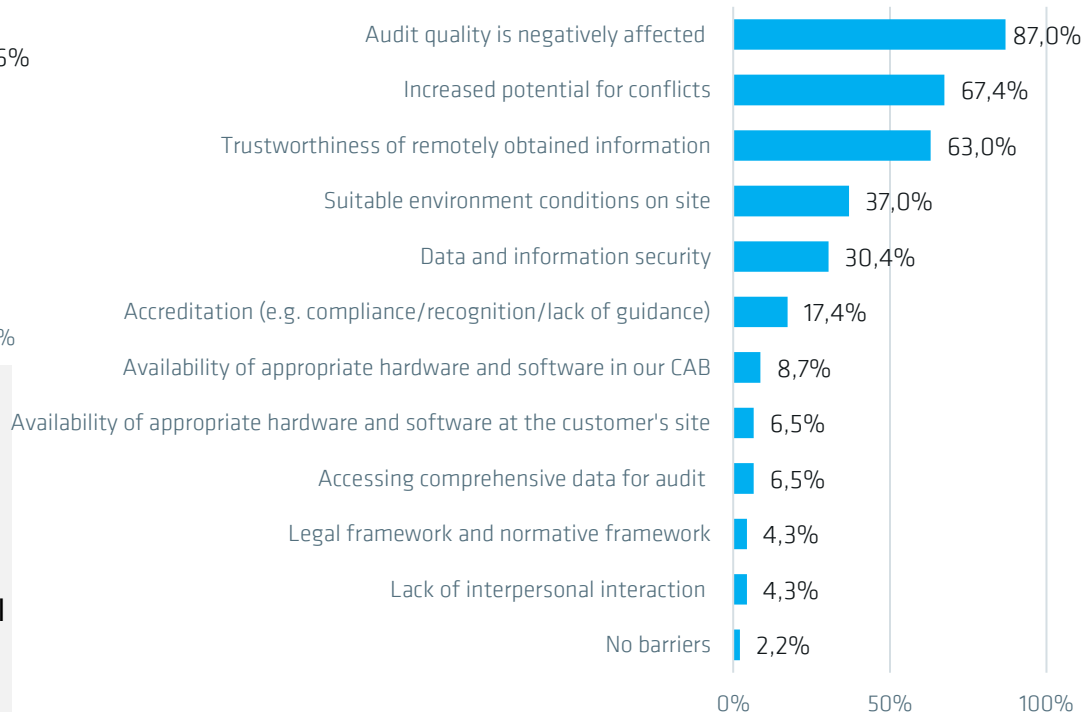
# Diverse approaches used and experienced hurdles in remote procedures

Type of remote procedures used (n=46)



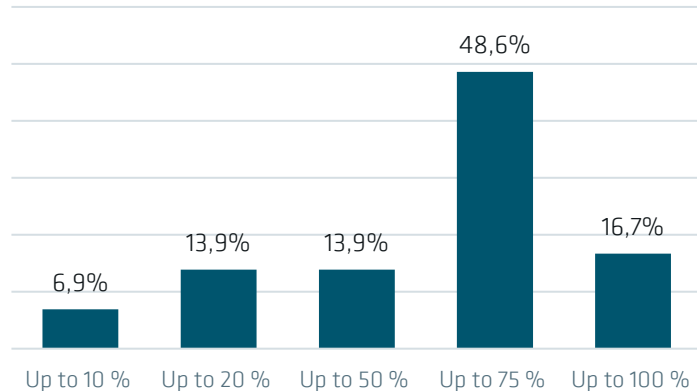
- **Expert remote audit methods** are the predominant type among remote methods used by CABs.
- When engaging in remote activities, the impairment of audit quality is the main **barrier** experienced. The increased potential for conflicts and trustworthiness of remotely obtained information can also be hindering.

Barriers (n=46)

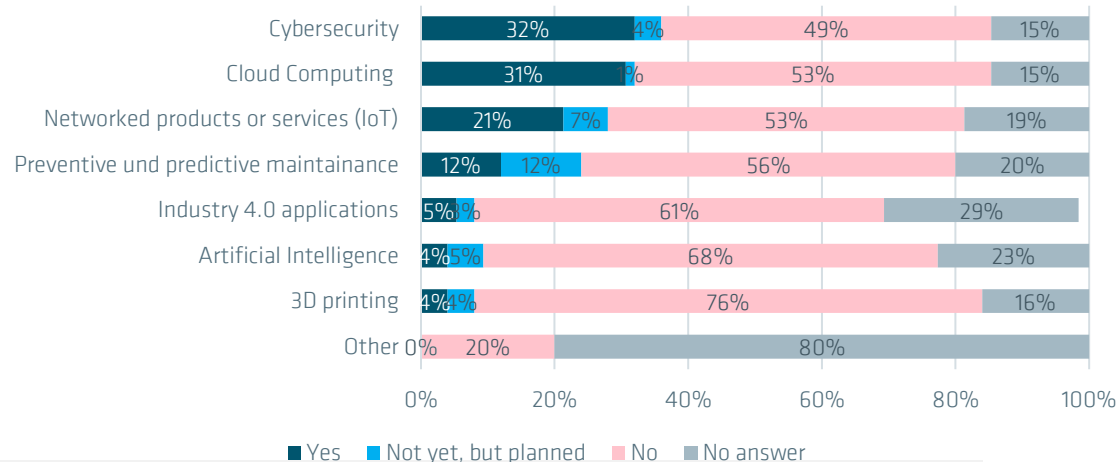


# CA for advanced digital technologies is only performed by a minority of CABs so far

Share of routine processes that are digital (n=72)



Digital products and applications for which CA is conducted (n=75)



- Almost every second CAB has digitalized up to 75% of its **routine processes**. However, one in three CABs has not digitally converted more than 50% of their processes.
- 45% of the surveyed CABs conduct **conformity assessments for modern digital technologies and applications**. In focus: cybersecurity (32%) and cloud computing (31%).

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# The COVID-19 Pandemic and Digitalization

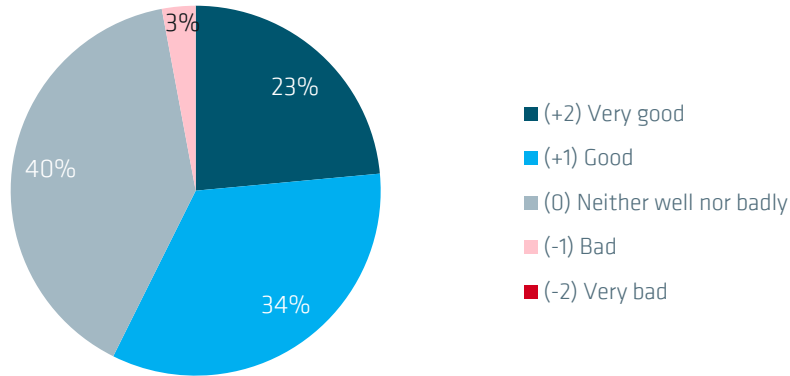
The COVID-19 pandemic has accelerated digitalization in many organizations. At the same time, previous studies show that digital organizations are more resilient. This section looks at the interaction of pandemic response and digitalization in CABs.

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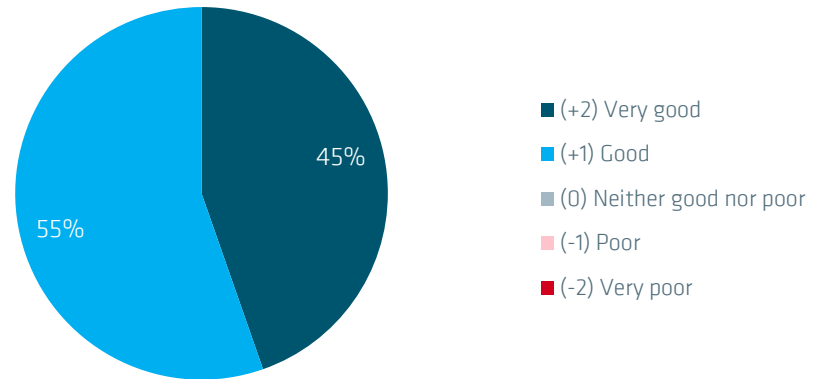
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# Most CABs have coped well with the COVID-19 pandemic

CABs' order situation in 2021 compared to pre-COVID-19 times (n=72)

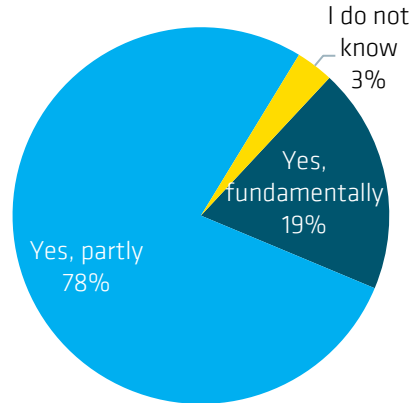


Response to the challenges of the COVID-19 pandemic (n=58)

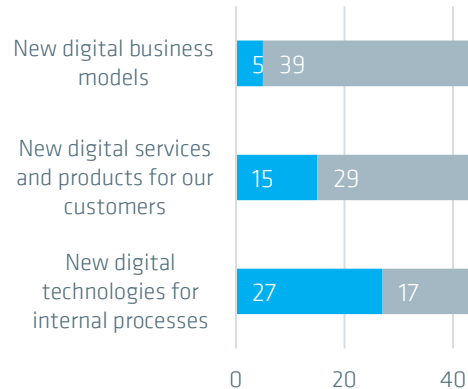


- For 40% of the CABs, the **economic situation** in terms of incoming orders in 2021 was no better or worse than before the pandemic. The majority (57%) claimed their order development had improved, only for 3% orders had declined.
- All CABs reported that they had **responded** well or very well to the challenges associated with the COVID-19 pandemic.

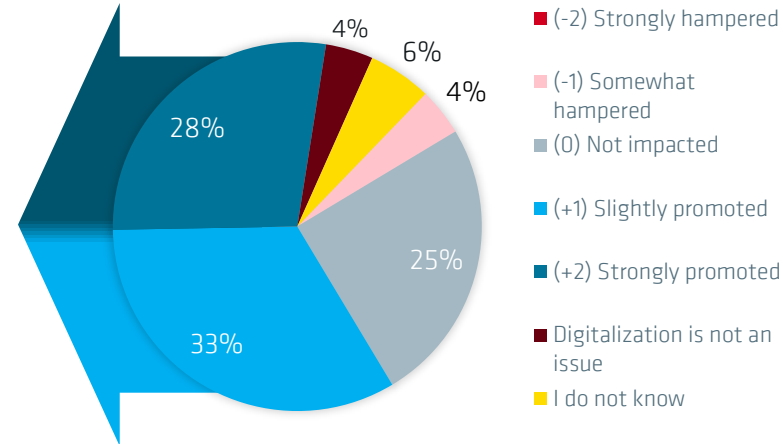
Digital technologies have helped coping with challenges of the COVID -19 (n=62)



Digital adaptation in course of the COVID-19 pandemic (n=44)



Impact of the Covid-19 pandemic on the digitalization of CABs (n=72)



- For almost all CABs (97%), digital technologies have helped in coping with the challenges of the COVID-19 pandemic.
- The pandemic has hindered digitalization in only 4% of the CABs. Rather, 56% of CABs report that digital transformation has been slightly or even strongly encouraged and has led to adaptations.
- 61% of CABs have introduced new digital technologies for internal processes, 34% new digital services and products for their customers, 11% even new digital business models.

- CABs in the Netherlands clearly see digital transformation as an opportunity. However, the **level of digitalization** varies greatly among them.
- Even though digital transformation is an individual project for each organization, **typical patterns of digital maturity** in Dutch CABs are nevertheless confirmed: an initial strong technological focus is followed by holistic organizational transformation, including change management and strong innovation networks.
- It is striking that many of the **cutting-edge digital technologies** that are on everyone's lips as buzzwords have not yet found their way into application in CABs. Blockchain, Artificial Intelligence, Big Data Analytics are only used by a few, many are not yet aware of the technologies and their potentials.
- With their digitalization efforts, the CABs are primarily **aiming** at internal process improvements. Routine processes are increasingly being digitalized and there is a switch to – mostly hybrid - remote processes.

## The Netherlands in international comparison

How do Dutch conformity assessment bodies compare internationally? We have conducted the survey on digitalization in conformity assessment in around 20 other countries. The individual country reports and a final comparative study will be published step by step on our website. Furthermore articles and an extensive report with further detailed analyses are planned.



➔ [www.qi-fokus.de](http://www.qi-fokus.de)



This study was developed in the context of the QI-Digital initiative. Its goal is to develop solutions for a modern digital quality infrastructure (QI) - together with stakeholders from business, politics, science, and QI.

More information on the initiative and the opportunities for participation can be found at

➔ [www.qi-digital.de](http://www.qi-digital.de)



# The project



## Project partners



Supported by

## Scientific execution / authors

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Prof. Dr. Knut Blind (TU Berlin, Fraunhofer ISI)

Prof. Dr. Pavel Castka (University of Canterbury, NZL)

Support: Timo Kabierski



## Acknowledgement

We would like to thank Dutch Accreditation Council RvA for its support in conducting this study. Our thanks further goes to all those who were involved in the preparation and implementation of this study, e.g. were available for expert interviews and questionnaire tests.

**QI-FoKuS** stands for **Qualitätsinfrastruktur - Forschung für Konformitätsbewertung und Sicherheit** ("Quality Infrastructure - Research for Conformity Assessment and Safety").

The initiative was launched jointly by BAM and TU Berlin in 2019 and is supported by the Federal Ministry of Economic Affairs and Climate Action (BMWK).

We conduct studies on current and fundamental topics of conformity assessment and accreditation. The studies are based on our comprehensive surveys of companies and in particular conformity assessment bodies in Germany and abroad. By publishing the results, we contribute to an improved database, scientifically sound findings and the identification of trends in quality infrastructure.

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# Annexes

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# Dimensions of digital maturity: Detailed overview

Each dimension of the maturity model consists of 4-6 criteria that describe its content. This includes, for example, relevant skills and resources. The survey participants were presented with corresponding statements for agreement on a 5-point scale (from 1 - I do not agree at all - to 5 - I fully agree). These values form the basis for calculating the digital maturity. The average results for the individual criteria in all dimensions are presented in detail below.



## Strategy (n=71)



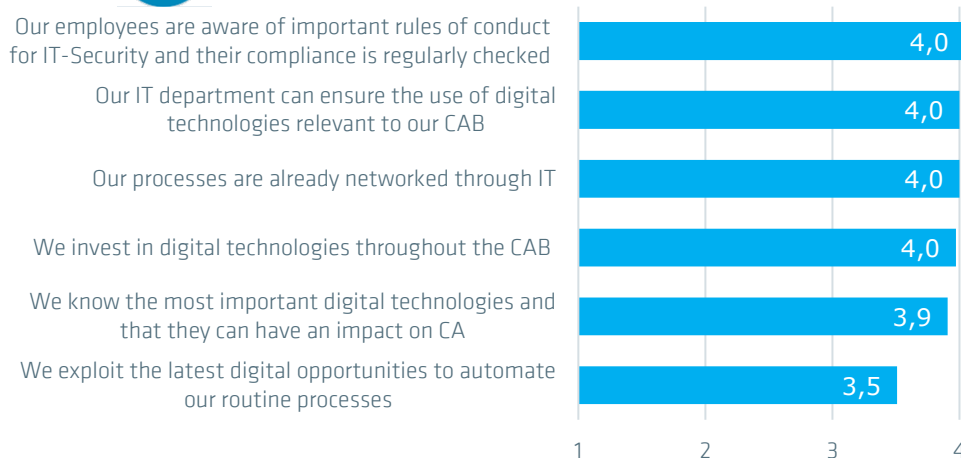
1 (I do not agree at all) to 5 (I fully agree)

- In most CABs (84%), digitalization plays a central role in their overall strategy, with 66% having a well documented digital strategy.
- Only 60% have set up a Digital Roadmap and less than 56% use key metrics to measure the implementation status of their digitalization strategy.

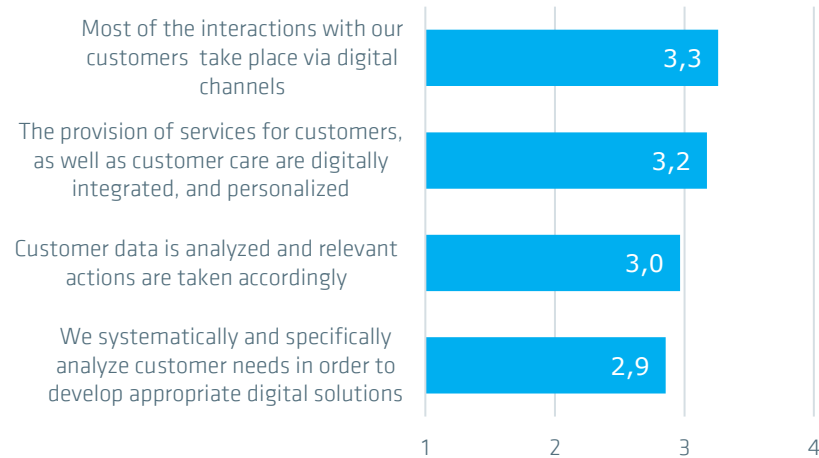
# Dimensions of digital maturity: Detailed overview



## IT & Process Digitalization (n=72)



## Customers (n=62)



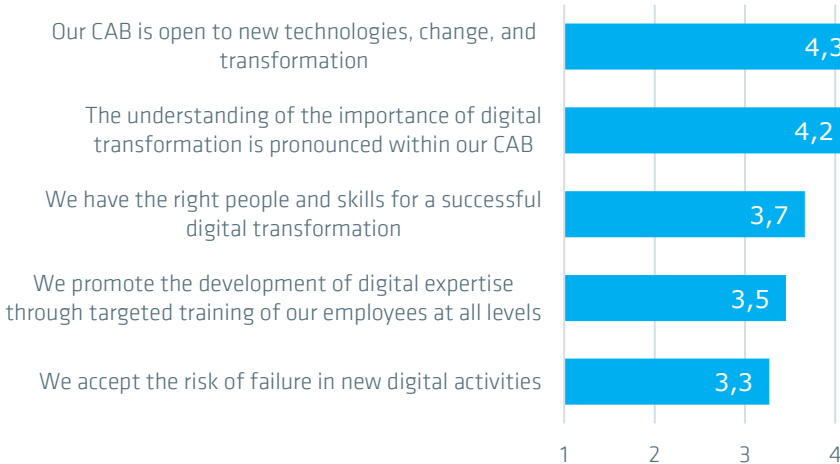
- 80% of CABs are aware of, invest in and are able to use digital technologies properly while complying with IT security regulations.
- More than 70% of CABs have networked their processes and automated routine procedures.

- Two out of three CABs in the Netherlands interact with their customers via digital channels.
- However, a lower proportion of CABs (64%) offer digitally integrated services to customers and only 58% of them develop appropriate digital solutions based on customer needs.

# Dimensions of digital maturity: Detailed overview



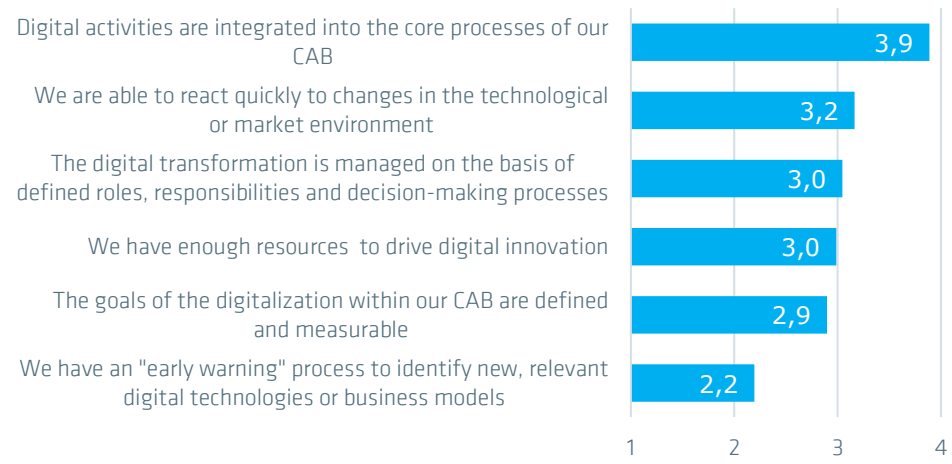
## Culture & Expertise (n=69)



- Dutch CABs are definitely open to new technologies, changes and transformations (86%).
- 84% of them have a strong understanding of the importance of digital transformation and have the right skills to successfully implement the change.



## Organization & Change Management (n=71)

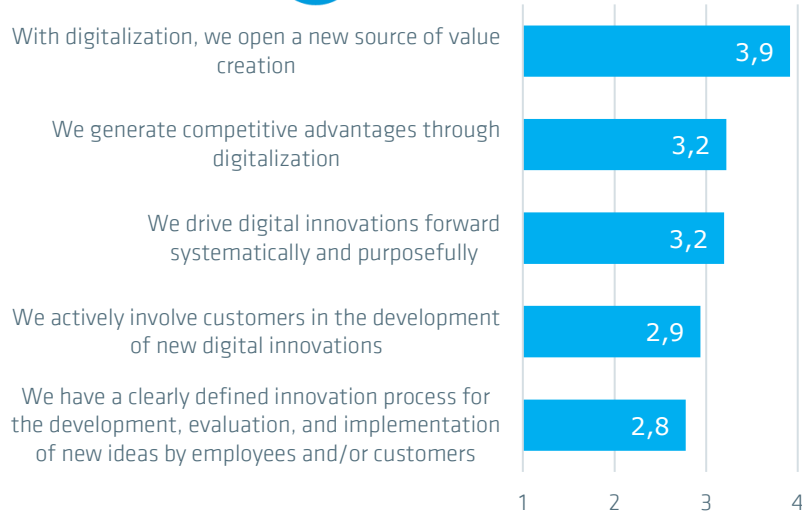


- 78% of CABs have integrated digital activities into their core processes. The clear definition of responsibilities and strategic goals is key to the implementation of digital transformation.

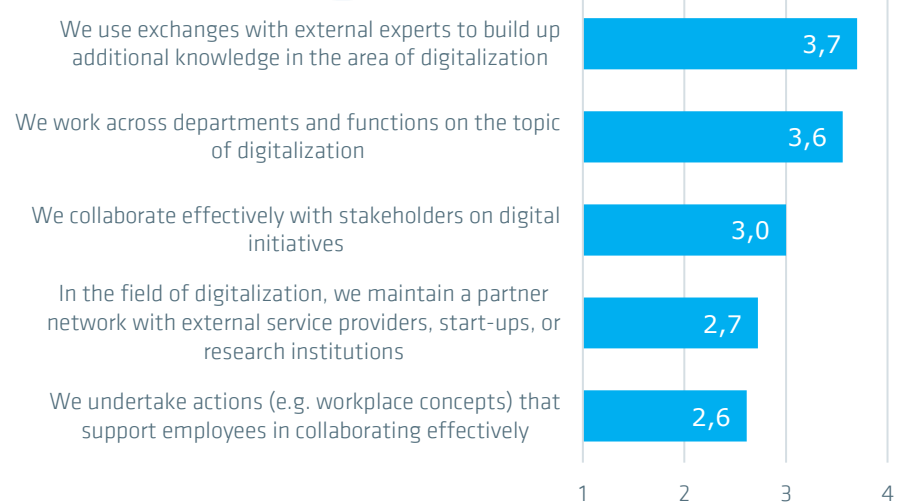
# Dimensions of digital maturity: Detailed overview



## Innovation (n=70)



## Cooperation (n=70)










- For the majority of participants, digitalization represents a new source of value creation (78%) and creates competitive advantages (64%).
- However, customers are hardly involved in the innovation process.



- The majority of CABs work across departments and functions on the topic of digitalization and obtain additional knowledge by consulting external experts.
- Collaboration with specific stakeholders of the CAB is less intensive. Only 54% maintain a partner network with external parties.

# Digital Maturity Model

## Level 1 (Beginner)

Description Level 1: Beginner	Dimensions						
							
Digitalization has a central role in our overall strategy	■						
Our processes are already networked through IT		■					
Our CAB is open to new technologies, change, and transformation				■			
The understanding of the importance of digital transformation is pronounced within our CAB				■			










 Strategy
  IT & Process Digitalization
  Customers
  Culture & Expertise
  Organization & Change Management
  Innovation
  Cooperation






# Digital Maturity Model

## Level 2








Description Level 2	Dimensions						
							
Our employees are aware of important rules of conduct for IT Security and their compliance is regularly checked							
We invest in digital technologies throughout the CAB							
Our IT department can ensure the use of digital technologies relevant to our CAB							
Most of the interactions with our customers (e.g., advise, purchase conclusion and customer service) take place via digital channels							
Digital activities are integrated into the core processes of our CAB							
With digitalization, we open a new source of value creation							



 Strategy
  IT & Process Digitalization
  Customers
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  Organization & Change Management
  Innovation
  Cooperation

# Digital Maturity Model

## Level 3





Description Level 3	Dimensions						
							
We have clearly defined the responsibilities for implementing the goals derived	■						
Our digital strategy is well documented and communicated	■						
We know the most important digital technologies and that they can have an impact on CA		■					
We exploit the latest digital opportunities to automate our routine processes		■					
The provision of services for customers, as well as customer care are digitally integrated, and personalized			■				
We have the right people and skills for a successful digital transformation				■			
We promote the development of digital expertise through targeted training of our employees at all levels				■			
We use exchanges with external experts to build up additional knowledge in the area of digitalization							■
We work across departments and functions on the topic of digitalization							■



Strategy IT & Process Digitalization Customers Culture & Expertise Organization & Change Management Innovation Cooperation

# Digital Maturity Model






## Level 4

Description Level 4	Dimensions						
							
We have defined a step-by-step implementation plan (Digital Roadmap) for achieving the goals	■						
We evaluate new technologies as well as changes in customer behavior to identify potential for digital innovation	■						
We systematically and specifically analyze customer needs in order to develop appropriate digital solutions			■				
Customer data is analyzed, and relevant actions are taken accordingly			■				
We accept the risk of failure in new digital activities				■			
We are able to react quickly to changes in the technological or market environment					■		
We have enough resources to drive digital innovation					■		
The digital transformation is managed on the basis of defined roles, responsibilities and decision-making processes					■		
The goals of the digitalization within our CAB are defined and measurable					■		
We generate competitive advantages through digitalization						■	
We drive digital innovations forward systematically and purposefully						■	



# Digital Maturity Model

## Level 5 (Expert)

Description Level 5: Expert	Dimensions						
							
We use key metrics to measure the implementation status of our digitalization strategy	■						
We have an "early warning" process to identify new, relevant digital technologies or business models for us					■		
We actively involve customers in the development of new digital innovations						■	
We have a clearly defined innovation process for the development, evaluation, and implementation of new ideas by employees and/or customers						■	
We collaborate effectively with stakeholders on digital initiatives							■
We undertake actions (e.g. workplace concepts) that support employees in collaborating effectively							■
In the field of digitalization, we maintain a partner network with external service providers, start-ups, or research institutions							■



Strategy IT & Process Digitalization Customers Culture & Expertise Organization & Change Management Innovation Cooperation