



Sicherheit in Technik und Chemie

2022

Digitalization in Conformity Assessment in the UK

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	2698 accredited conformity assessment bodies (CABs) in the UK
Data collection method	Online survey
Survey period	February 4, 2022 March 9, 2022
Sample	57 fully completed questionnaires (= 2% 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 depend 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, digitalization also offers new opportunities. Our QI-FoKuS study explores "Digitalization in Conformity Assessment" based on data from an online survey of accredited CABs in the UK.

Major topic areas covered

Digital Maturity Level

- Assessment of digital readiness and status of digital transformation in CABs based on a tailored digital maturity model

Drivers, Benefits and Barriers

- Drivers and motives for digital transformation, the benefits and impacts realized, and barriers faced by CABs towards digital transformation

Technology Trends

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

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The Sample

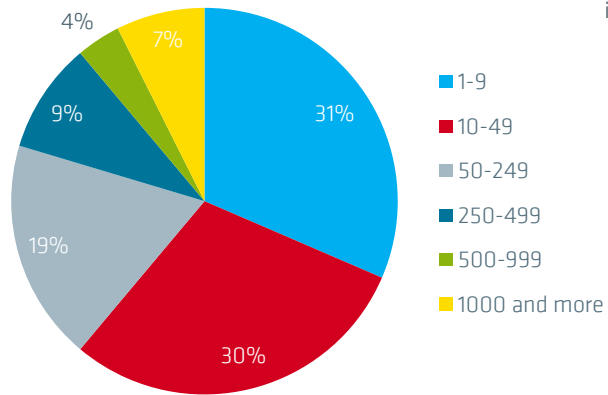
General information about the participating
Conformity Assessment Bodies

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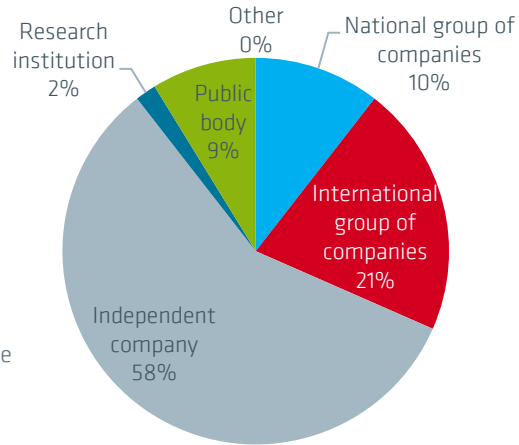
57 conformity assessment bodies (CABs) in the UK participated in the survey

- 61% of participating CABs are **small and medium-sized businesses (SMEs)** with less than 50 employees.
- 58% are **independent companies**, 21% belong to an **international group of companies**, 10% to a **national group of companies** and 9% are **public bodies**.
- For 46%, conformity assessment (CA) is the main economic **focus of the activity**, and for 33% it is **one activity among others**.

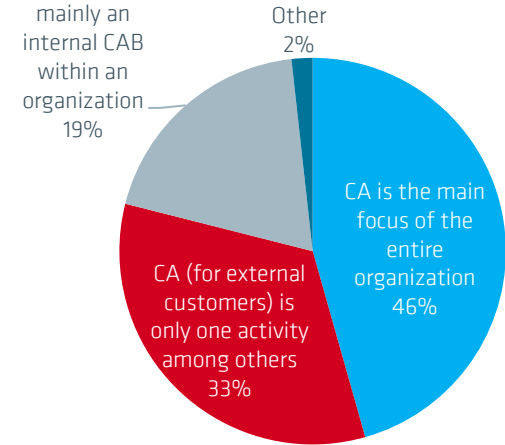
Number of employees (n=57)



Type of organization (n=57)

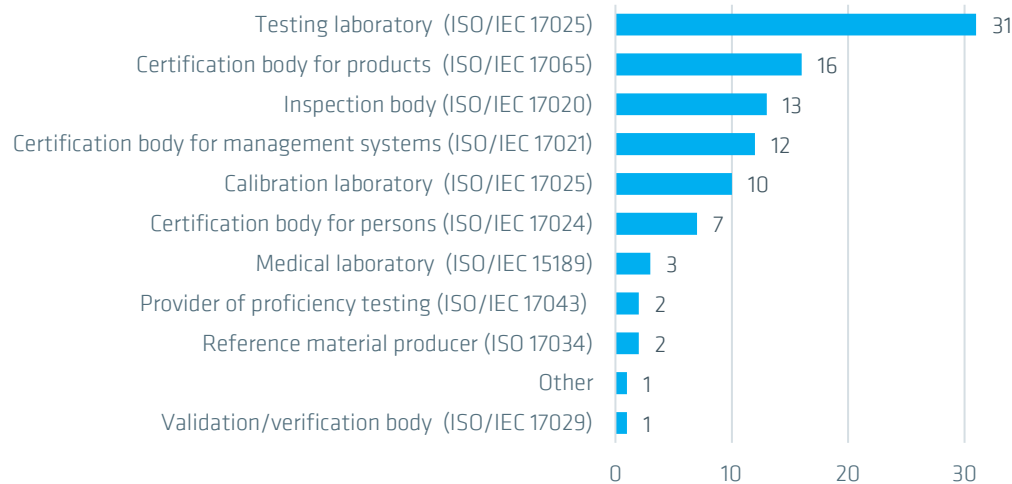


Role of CA for the organization (n=57)

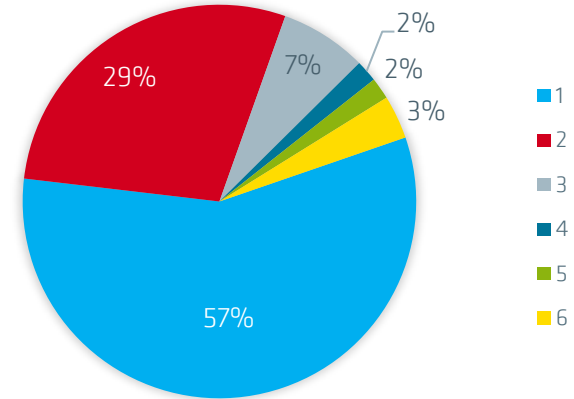


The 57 participating CABs cover a broad range of activities

Field of activity



Number of fields of CA activities per CAB

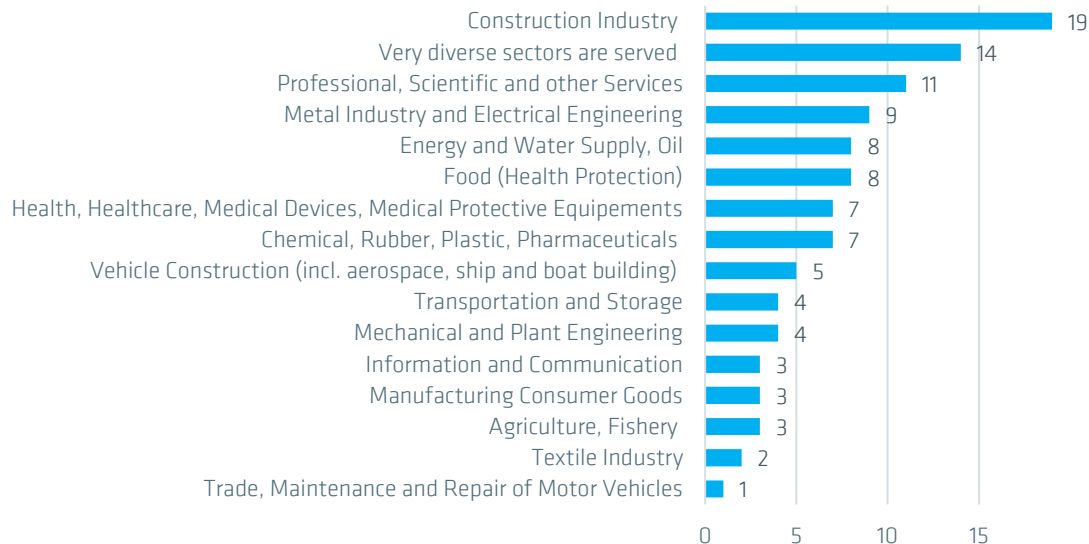


- Testing laboratories represent the **largest group of participants**, followed by certification bodies for products and inspection bodies.
- 57% of CABs **specialize** in a single field of activity in conformity assessment; only a few cover a broad range of fields of activity (up to 6).

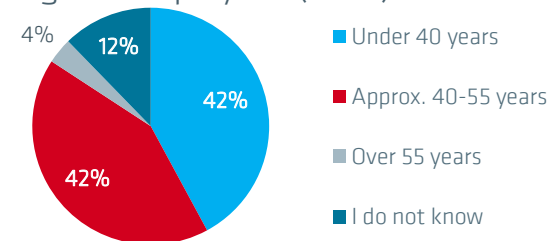
The CABs serve a wide range of industries



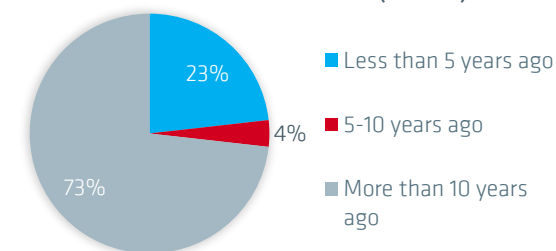
Main sectors served by the CABs



Age of employees (n=57)



Establishment of the CAB (n=57)



- The customers served by CABs are mainly from the **construction industry**, but also very diverse sectors are served.
- The majority of CABs (84%) have staff under 55 years on average.
- 73% of the CABs were established more than 10 years ago; one out of four CABs is younger than 5 years.

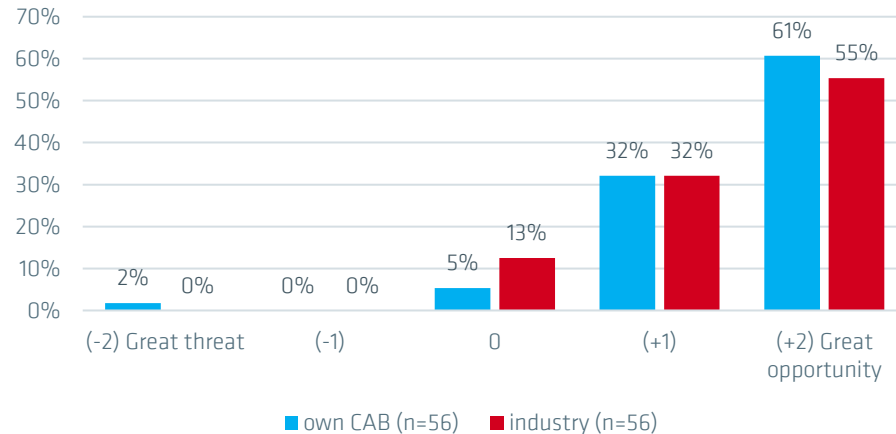
Digitalization in British CABs A General Overview

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

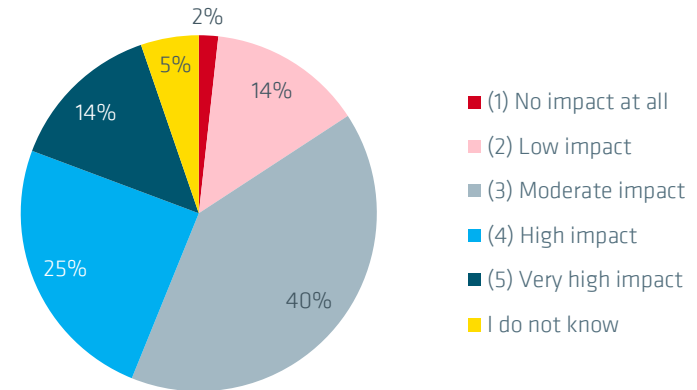
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Digitalization more of an opportunity rather than a threat

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



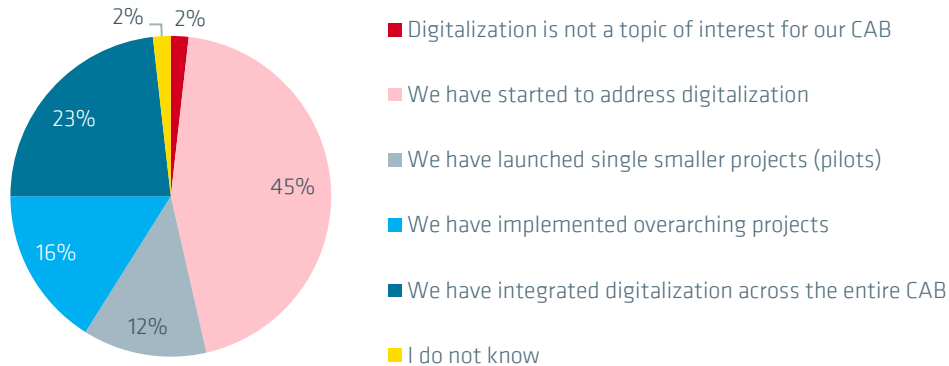
Expected impact of digitalization in the next 5-10 years (n=57)



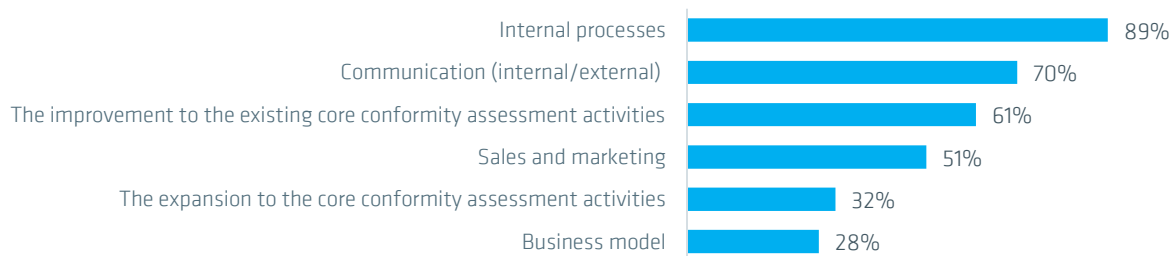
- In general, CABs have a **positive perception** of digitalization: 93% of the surveyed CABs recognize digitalization as an **opportunity or even a great opportunity** rather than a threat for their own organization, and 87% with regard to the whole CA industry.
- 39% of the participants expect digitalization to have a **great or even very great impact on CA activities** in the next 5-10 years. The majority (40%) anticipate a moderate impact.

CABs have started to address digitalization// Focus mainly on internal processes

Status and extent of digitalization in the CABs (n=56)



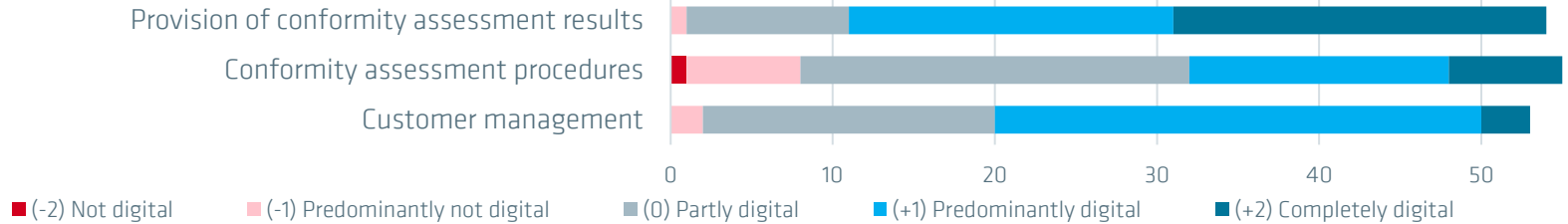
Areas targeted by digitalization (multiple answers possible, n=57)



- 45% of the CABs have started to address digitalization and 12% have launched single smaller projects. 23% of the CABs have already integrated digitalization throughout the whole organization.
- Most **digitalization activities concern internal processes**. Yet communication and the improvement to the existing core CA activities are also relevant areas. However, digitalization is currently rarely used for the expansion to the core CA activities or even less to adopt new business models.

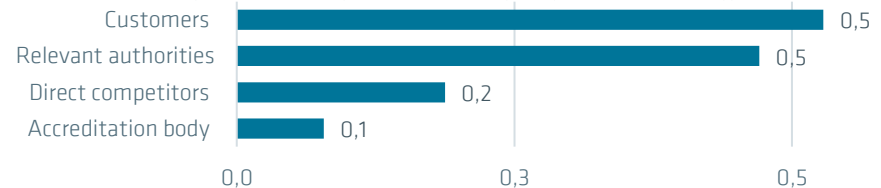
Positive self-assessment on digitalization in core areas - and in comparison with stakeholders

Self-evaluation of the CABs' status of digitalization in different areas (n=56)

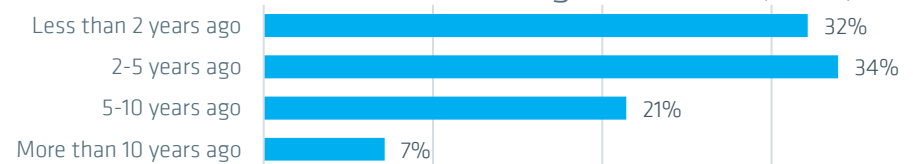


- The CA results are provided predominantly or completely digitally by the majority of CABs (78%). The CA processes themselves are less frequently digitalized.
- Compared to **other organizations** that are direct stakeholders, CABs rate their digital status on average as at least as good or slightly better, especially with regard to customers and the relevant authorities.
- Digitalization has not been a topic for long: One in three CABs has only **started to deal with it** in the last 2 years. Only a few have already done so at least 10 years ago.

Own status of digitalization compared to... (n=57)
(on a scale of (-2 much worse) to (+2 much better))



CABs started to deal with digitalization... (n=56)



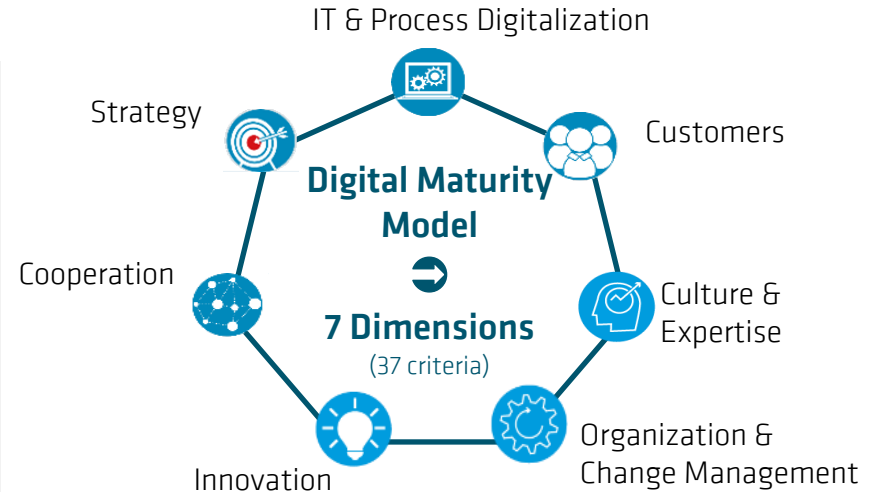
Digital Maturity of CABs

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 UK based on a model developed specifically for this study.

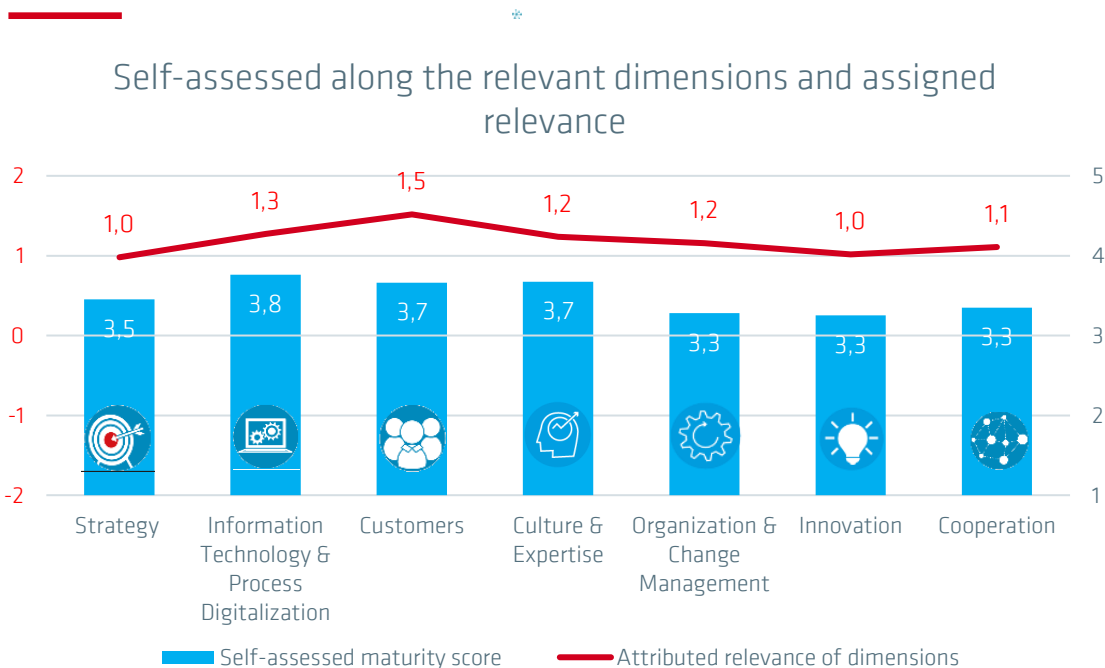
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The digital maturity model for the conformity assessment industry

- 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").



Different maturity of dimensions: Technology advanced, organization not yet



* 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).

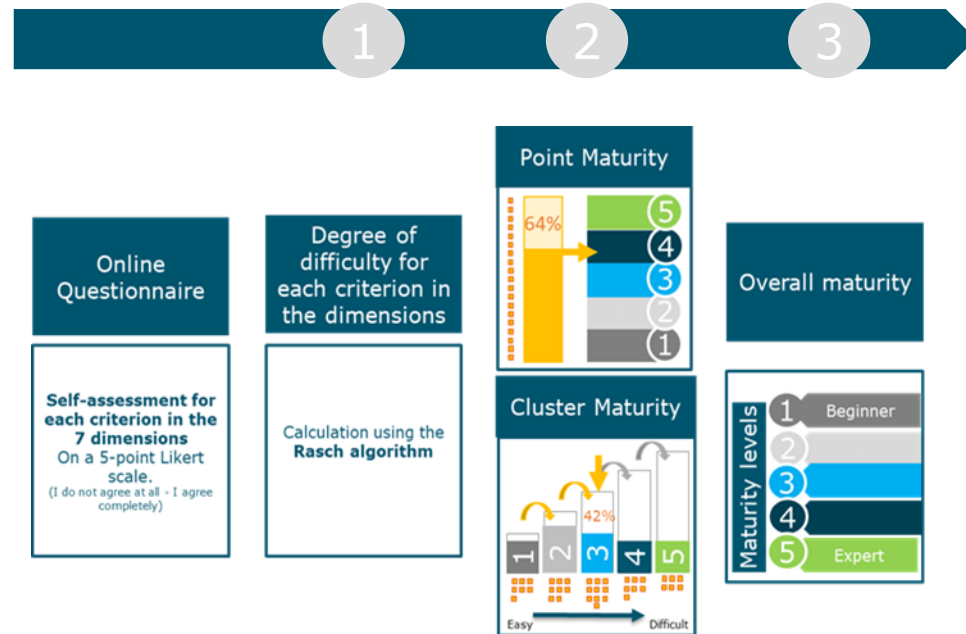
- The results of the maturity model show that the status of the CAB slightly differs in the various dimensions:
 - The CABs consider themselves to be **most advanced** in the area of “IT & Process Digitalization”, “Culture & Expertise” and “Customers”.
 - The **greatest need** to catch up is in the areas of “Organization & Change Management”, “Innovation” and “Cooperation” - 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:

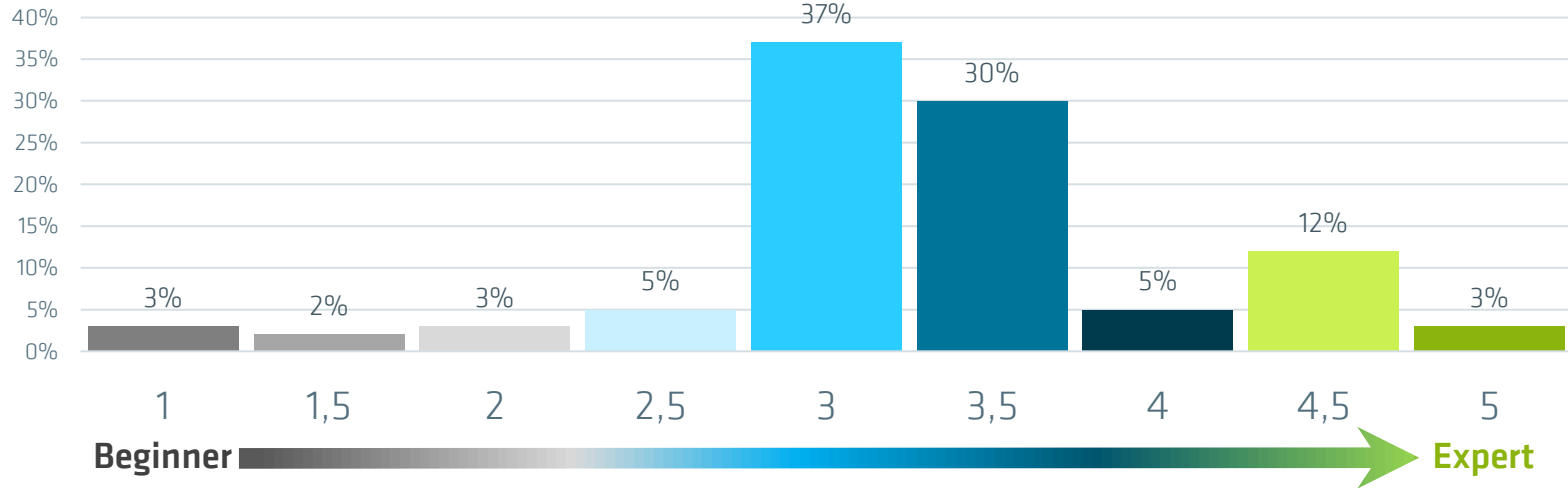
1. For each criterion, the Rasch algorithm is first used to calculate how difficult it is to achieve a good result for it (**degree of difficulty**). If, on average, a large number of participants state that they can meet this criterion, it is classified as easy to achieve.
2. Based on this, 2 types 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 British CA industry

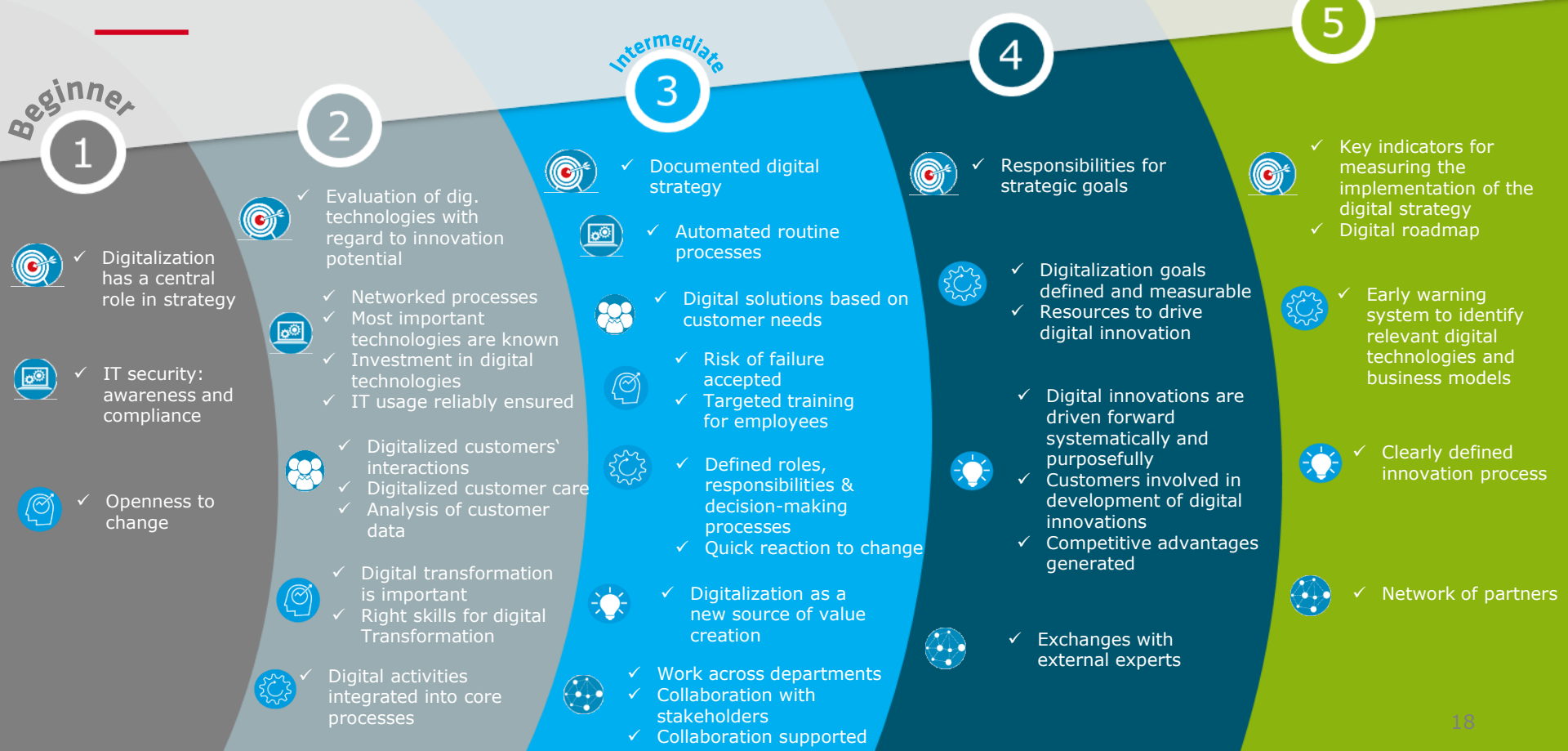
Distribution of overall maturity scores (n=57)



The digital maturity levels achieved by the 57 participating CABs in the UK follow a right-skewed *normal distribution*:

- Two out of three CABs have reached the medium level (i.e. 3 and 3,5). 20% of CABs have already reached a higher level of maturity, while 13% of the CAB are still in an earlier stage of transformation.
- So far, only 3% of the CABs have reached expert level 5.

The 5 Digital Maturity stages in British CABs



Beginner

1

- ✓ Digitalization has a central role in strategy
- ✓ IT security: awareness and compliance
- ✓ Openness to change

2

- ✓ Evaluation of dig. technologies with regard to innovation potential
- ✓ Networked processes
- ✓ Most important technologies are known
- ✓ Investment in digital technologies
- ✓ IT usage reliably ensured
- ✓ Digitalized customers' interactions
- ✓ Digitalized customer care
- ✓ Analysis of customer data
- ✓ Digital transformation is important
- ✓ Right skills for digital Transformation
- ✓ Digital activities integrated into core processes

Intermediate

3

- ✓ Documented digital strategy
- ✓ Automated routine processes
- ✓ Digital solutions based on customer needs
- ✓ Risk of failure accepted
- ✓ Targeted training for employees
- ✓ Defined roles, responsibilities & decision-making processes
- ✓ Quick reaction to change
- ✓ Digitalization as a new source of value creation
- ✓ Work across departments
- ✓ Collaboration with stakeholders
- ✓ Collaboration supported

4

- ✓ Responsibilities for strategic goals
- ✓ Digitalization goals defined and measurable
- ✓ Resources to drive digital innovation
- ✓ Digital innovations are driven forward systematically and purposefully
- ✓ Customers involved in development of digital innovations
- ✓ Competitive advantages generated
- ✓ Exchanges with external experts

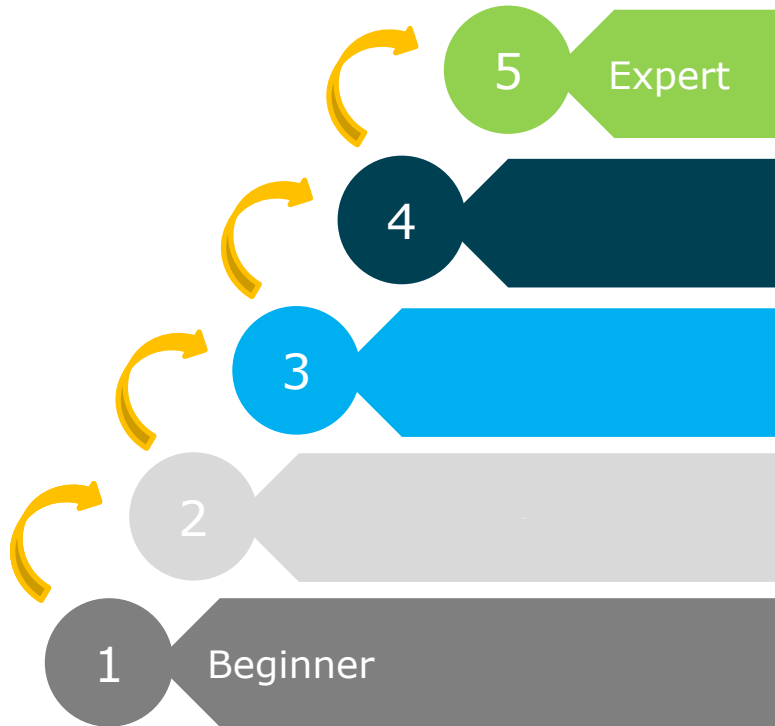
Expert

5

- ✓ Key indicators for measuring the implementation of the digital strategy
- ✓ Digital roadmap
- ✓ Early warning system to identify relevant digital technologies and business models
- ✓ Clearly defined innovation process
- ✓ Network of partners

The Digital Maturity of CABs in the UK//

Summary of the observed patterns



- Even at the **first maturity level**, digitalization is given a central place in the corporate strategy. CABs are already open to new technologies, change and transformation.
- In the **second maturity stage**, there is a strong focus on IT: most important technologies are known and corresponding investments are made. CABs have the right skills for digital transformation and interactions with customers are digitalized. Customer needs and analyses increasingly come into focus.
- For **stage three**, capabilities, resources, and capacities are activated in all dimensions. Digitalization is recognized and pursued as a driver for new value creation. There is cross-departmental and external collaboration on digitalization.
- In the **fourth maturity stage**, the focus is on innovation, with the definition of responsibilities and resource allocation. CABs use digitalization to generate competitive advantages and digitalization goals are defined and measurable
- In the final **fifth stage**, CABs have a digital roadmap and there are warning systems in place to identify relevant digital technologies.

Motives, Impacts and Hurdles of Digitalization

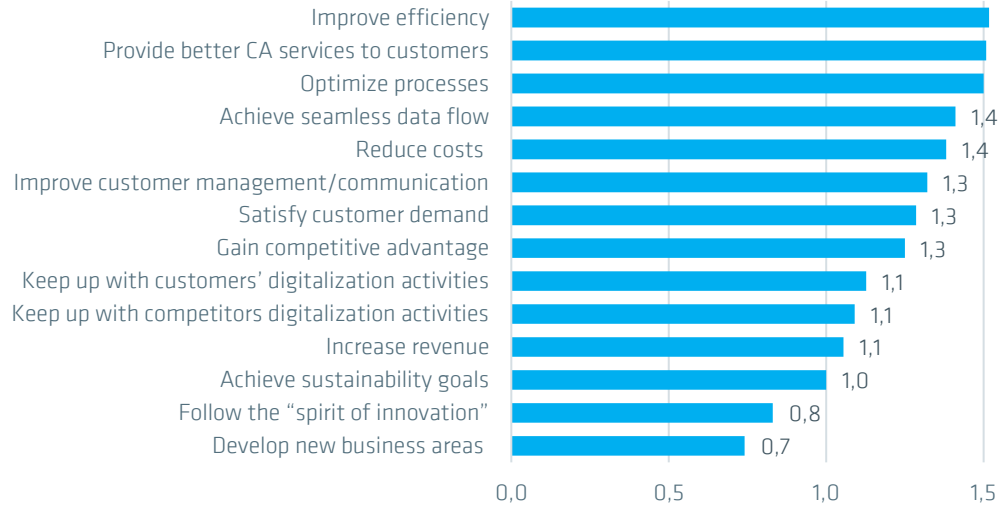
What drives digitalization in British CABs? What effects can be achieved for the organizations? Are expectations being met? And what are the biggest hurdles to overcome in the digital transformation?

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Focus on efficiency enhancement

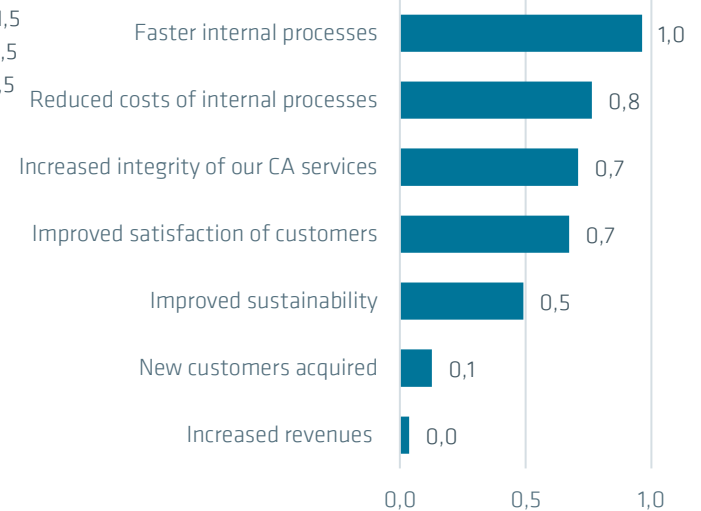
Goals behind the digitalization efforts (n=56)

(on a scale from (-2) does not apply at all to (+2) fully applies)



Benefits realized from digitalization (n=55)

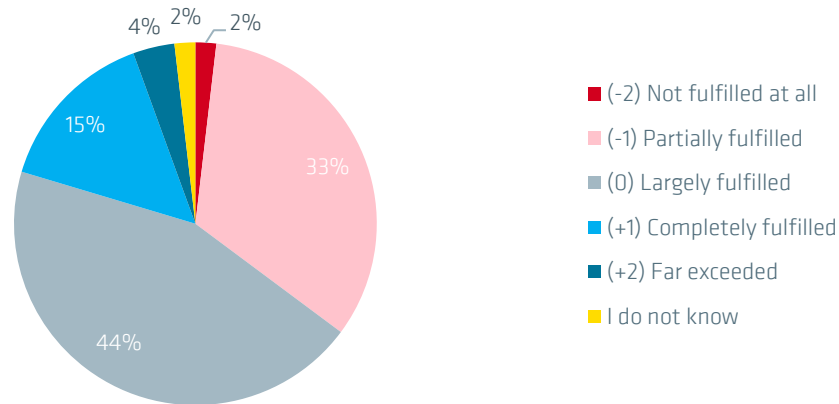
(on a scale from (-2) not agree at all to (+2) fully agree)



- Increased efficiency, providing better CA services to customers and process optimization are the **main goals** behind the digitalization efforts of CABs in the UK. In fact, faster and more cost-effective internal processes are seen as the greatest realized benefits.
- Market objectives such as increased revenues or the development of new business areas are no big drivers - and the effects achieved on sales and new customer acquisition are correspondingly low.

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

Whether the expectations behind the introduction of digital processes/technologies have been fulfilled overall so far (n=54)

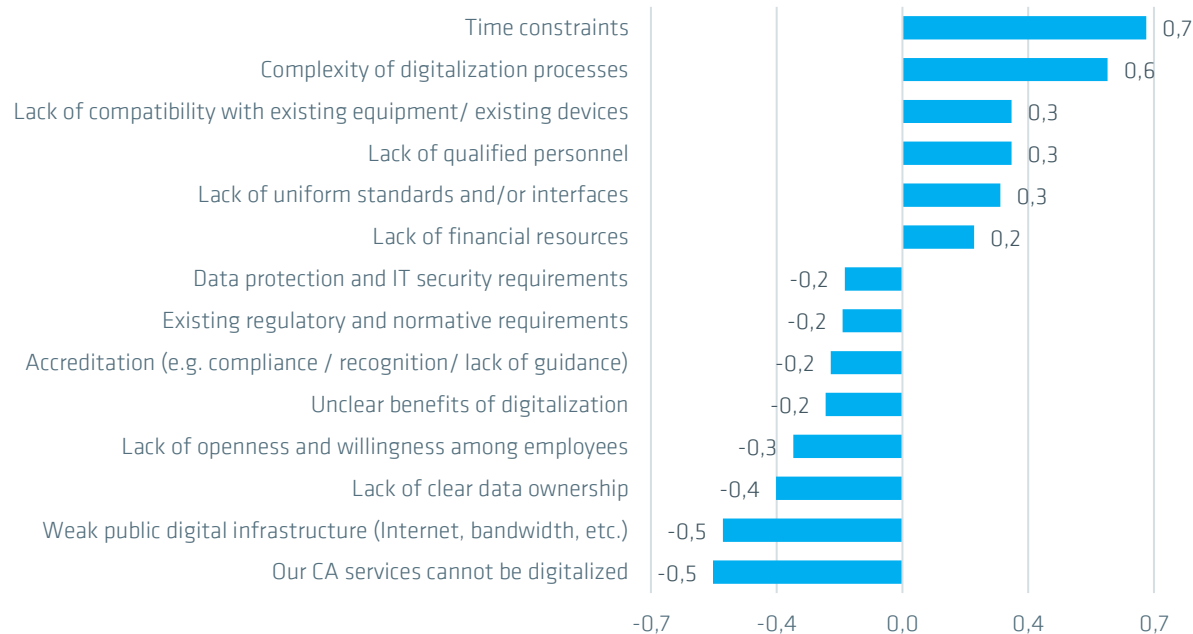


- 59% of the CABs consider their expectations behind the introduction of digital technologies to have been largely or completely fulfilled. Another 30% find them at least partially fulfilled.
- Only for 2% of the CABs the expectations are not fulfilled at all. However, they are confident to still meet the expectations in the long run.

The lack of financial resources is the biggest hurdle to digital transformation

Hurdles to digital transformation (n=57)

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



- Time constraints are the biggest hurdle for CABs, followed by the general complexity of digitalization processes and the lack of compatibility with existing equipment/devices.
- Technical aspects such as a lack of uniform standards and/or interfaces is an issue for many CABs.
- While the lack of qualified personnel and financial resources is an obstacle, a lack of openness/ readiness on the part of employees is not.

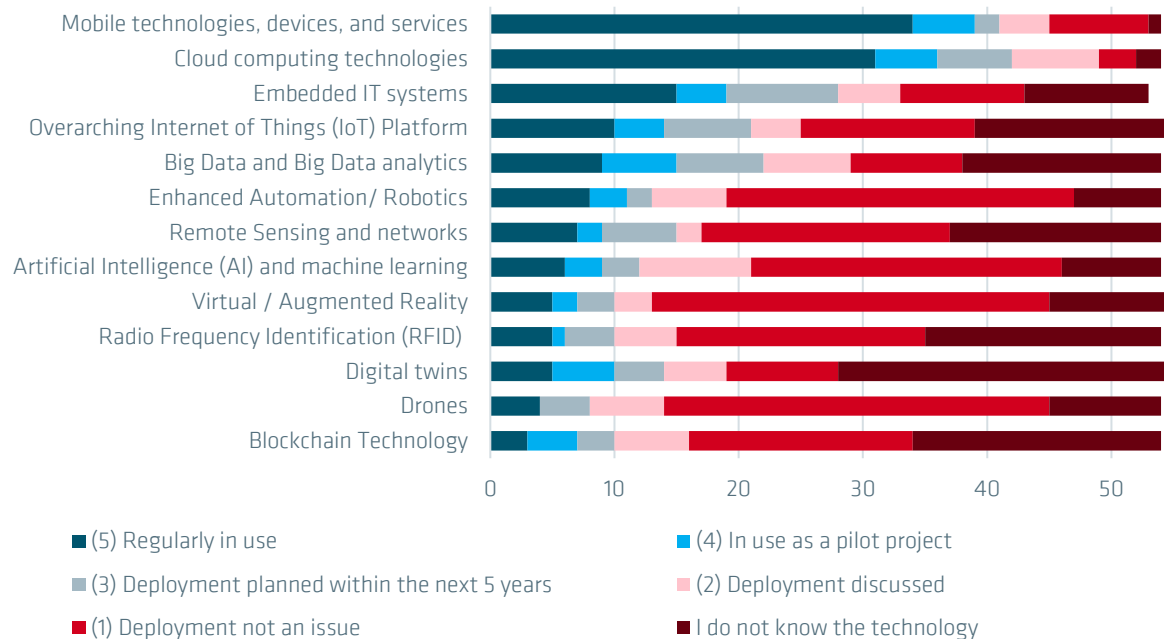
Technologies and Trends

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

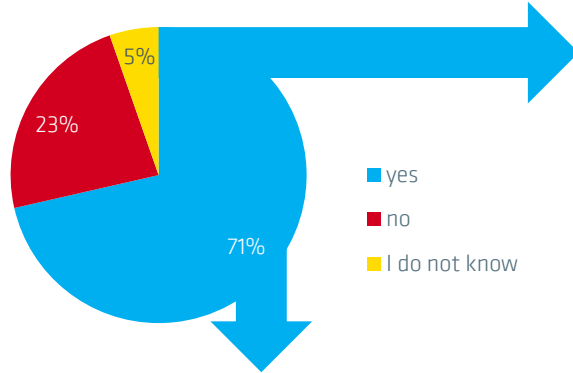
Advanced digital technologies use or planned to be used (n=55)



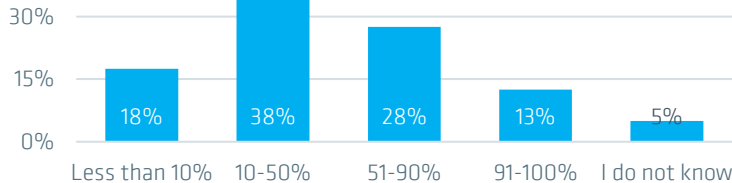
- Many of the latest digital technologies such as Big Data, artificial intelligence and virtual reality are used by CABs in the UK, but not yet on a large scale.
- Blockchain technologies mean nothing to 37% of the respondents, digital twins to 49%.
- Among CABs, mobile technologies are the most widely used ones.
- Cloud computing technologies and embedded IT systems are also in use in many CABs.

Remote methods and technologies are used by most CABs

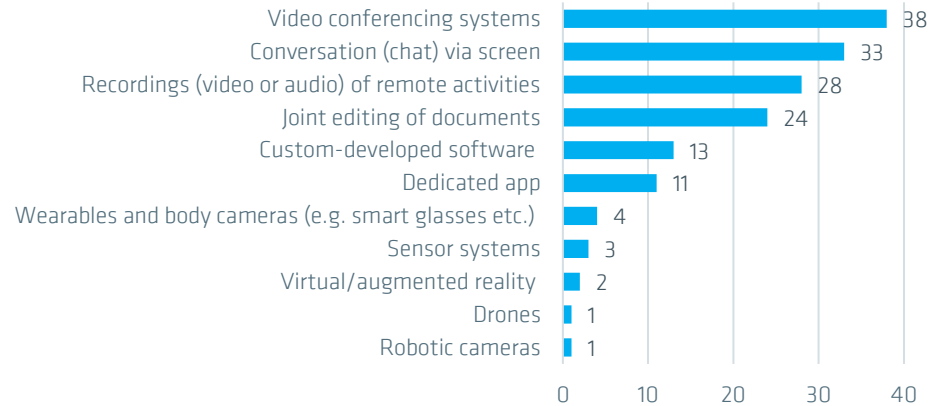
CABs that use remote methods in CA (n=55)



Share of CA services taking place remotely (n=40)



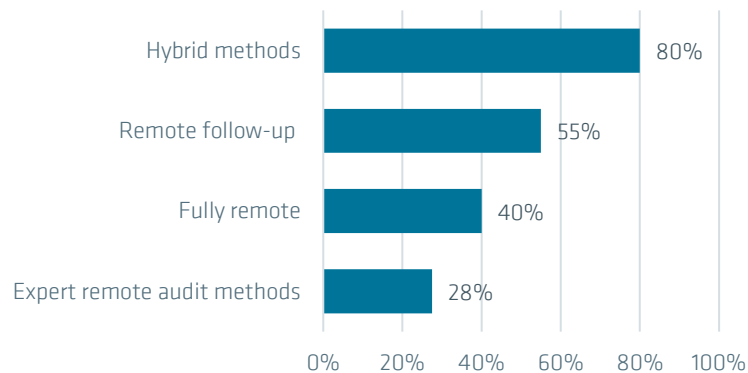
Technologies used for remote procedures (n=40)



- 71% of the CABs use **remote methods** in their CA activities.
- The majority of CABs (38%) perform 10-50% of their activities remotely, only 13% have switched completely.
- Video conferencing systems is the most used **tool for remote working**, while drones or robotic cameras are still rarely used.

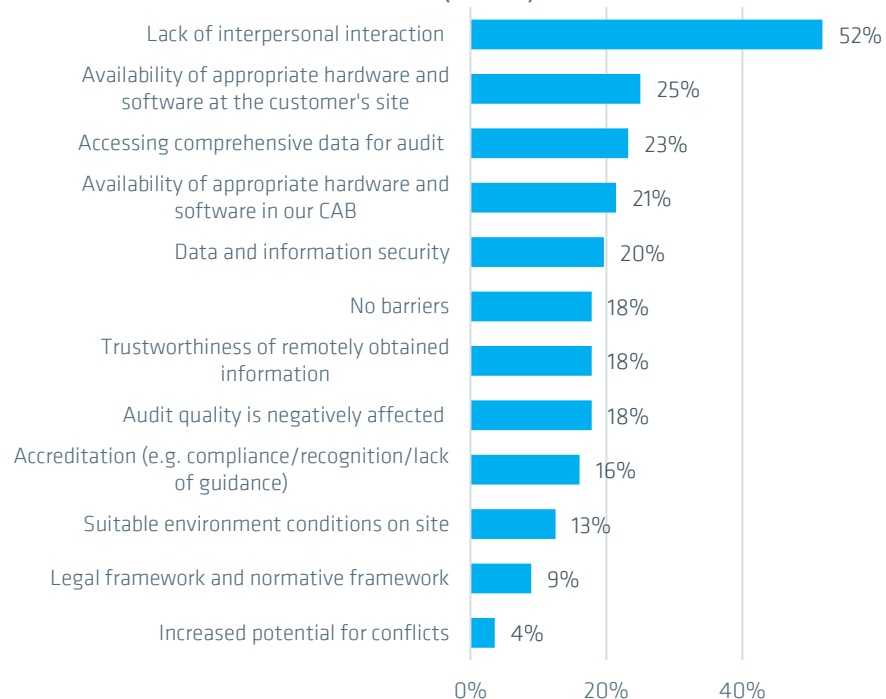
Diverse approaches used and experienced hurdles in remote procedures

Type of remote procedures used (n=40)



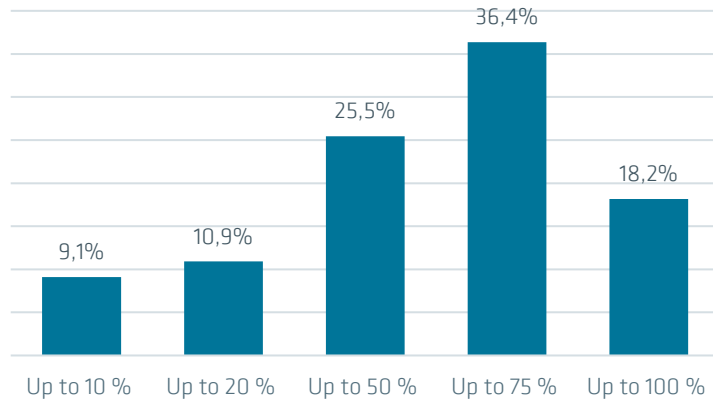
- **Hybrid methods** are the predominant type among remote methods used by CABs.
- Lack of interpersonal interaction is seen as the biggest **hurdle** in the use of remote methods, followed by the availability of appropriate hardware and software at the customer's site.

Barriers (n=56)

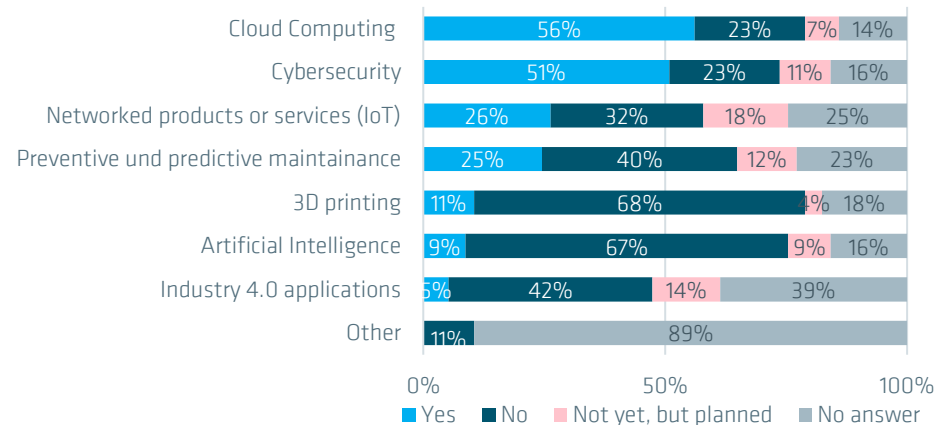


CA for advanced digital technologies is only performed by a minority of CABs so far

Share of routine processes that are digital (n=55)



Digital products and applications for which CA is conducted (n=49)



- 66% of the CABs have digitalized more than half of their **routine processes**. However, nearly one in ten CABs has not digitally converted even 10% of its processes.
- 63% of the surveyed CABs conduct **conformity assessments for modern digital technologies and applications**. In focus: cloud computing (56%) and cybersecurity (51%).

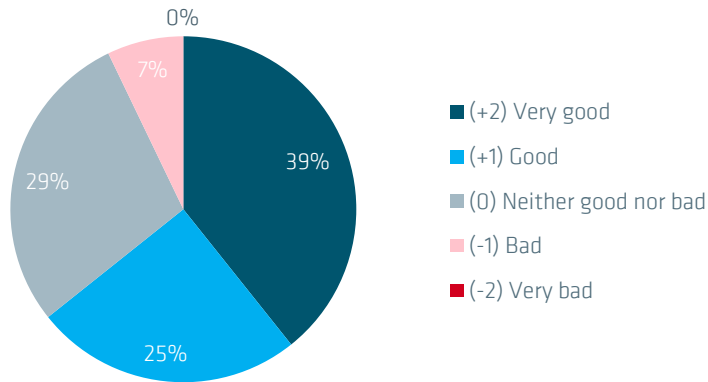
The COVID-19 Pandemic and Digitalization

The role of digitalization in responding to the challenges posed by the COVID-19 pandemic and the impact of the pandemic on digitalization.

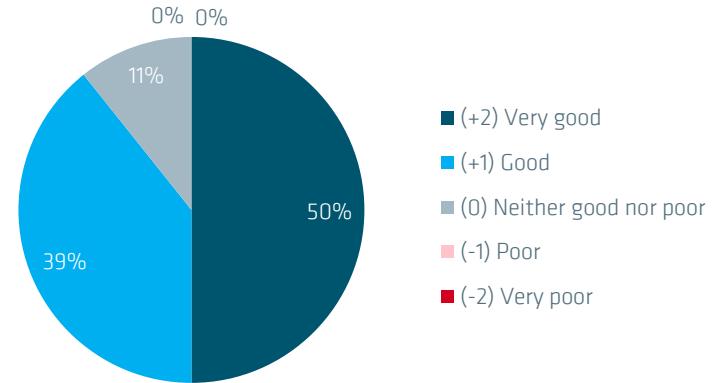
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Most CABs have coped well with the COVID-19 pandemic

CABs' order situation in 2021 compared to pre-COVID-19 times (n=56)

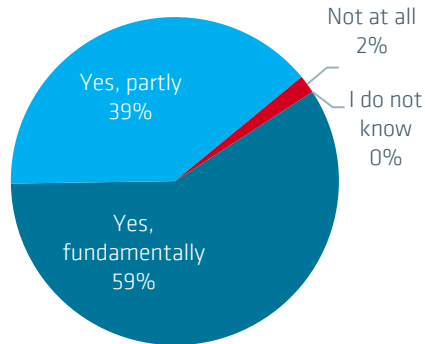


Response to the challenges of the COVID-19 pandemic (n=56)

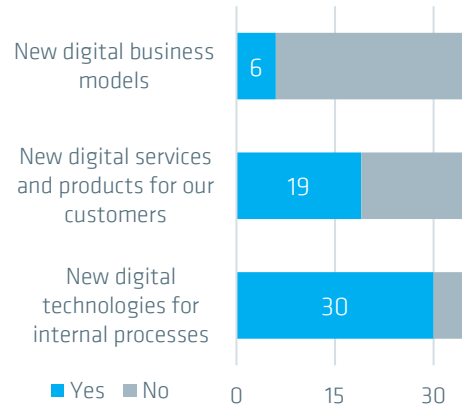


- For 29% of the CABs, the **economic situation** in terms of incoming orders in 2021 was no better or worse than before the pandemic. 64% claimed their order development had improved, for another 7% orders had declined.
- The majority of CABs (89%) reported that they had **responded** well or very well to the challenges associated with the COVID-19 pandemic.

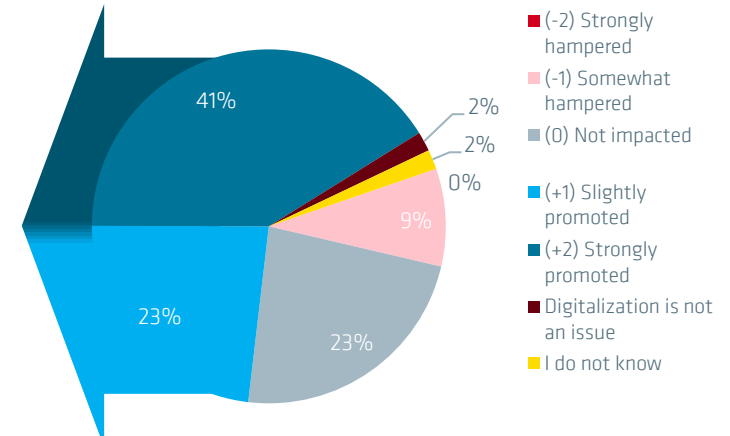
Digital technologies have helped coping with challenges of the COVID-19 pandemic (n=56)



Digital adaptation in course of the COVID-19 pandemic (n=36)



Impact of the Covid-19 pandemic on the digitalization of CABs (n=56)



- For 98% of CABs, digital technologies have helped in coping with the challenges of the COVID-19 pandemic.
- Yet, in 9% of CABs the pandemic has hampered digitalization while 64% of CABs report that digital transformation has been slightly or even strongly encouraged and has led to adaptations:
 - 83% of CABs have introduced new digital technologies for internal processes, 53% new digital services and products for their customers, 17% even new digital business models.

- CABs in the UK clearly see digital transformation as an opportunity. The **level of digitalization** varies among CABs. The majority of participants has reached a medium or higher level of digital maturity.
- Even though digital transformation is an individual project for each organization, **typical patterns of digital maturity** in British CABs are nevertheless confirmed: An initial strong technological focus is followed by holistic organizational transformation, including change management and strong innovation networks.
- Many of the cutting-edge digital technologies such as Big Data, artificial intelligence and virtual reality are used by CABs in the UK, but not yet on a large scale.
- 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 UK in international comparison

How do British 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



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

The Project and Contacts

Project partners



Supported by



Scientific execution / authors

Dr. Luana Ladu, Dr. Claudia Koch, Parsa Asna Ashari (BAM)

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

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

Support: Timo Kabierski



Acknowledgement

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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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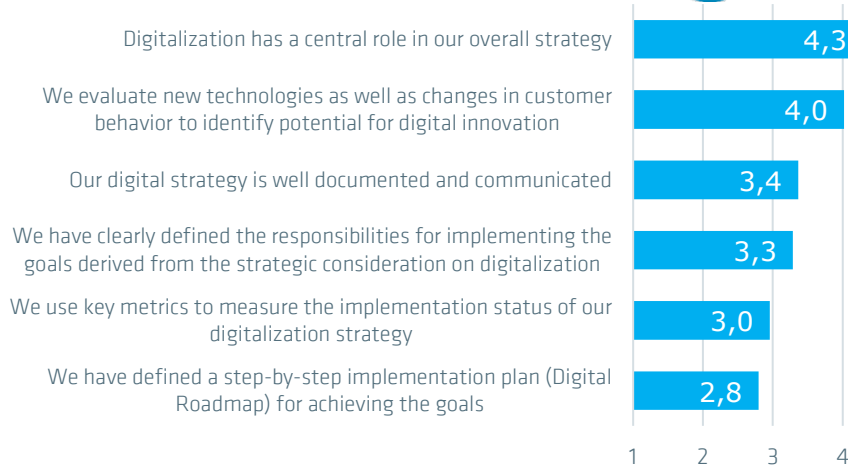
www.bam.de

Annexes

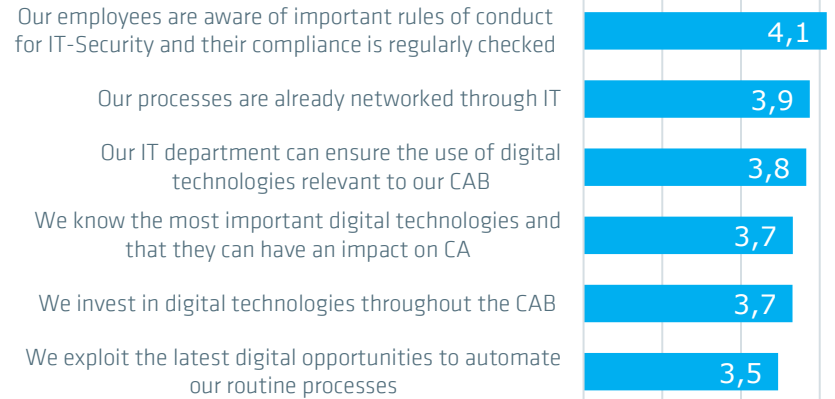
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Dimensions of digital maturity: Detailed overview

Strategy (n=55)



Information Technology & Process Digitalization (n=56)

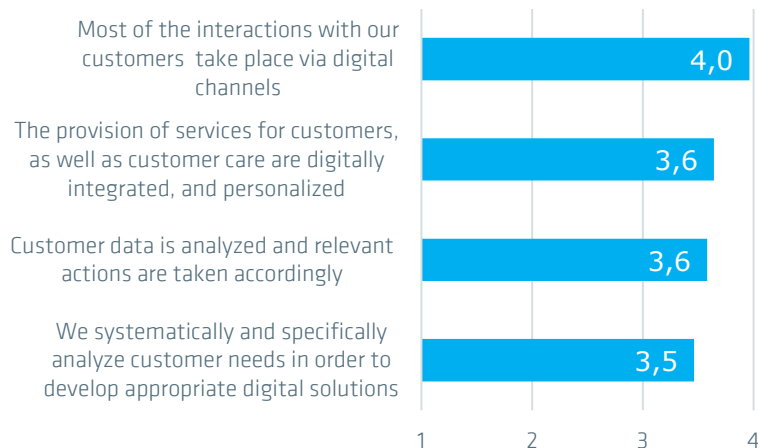


1 (I do not agree at all) to 5 (I fully agree)

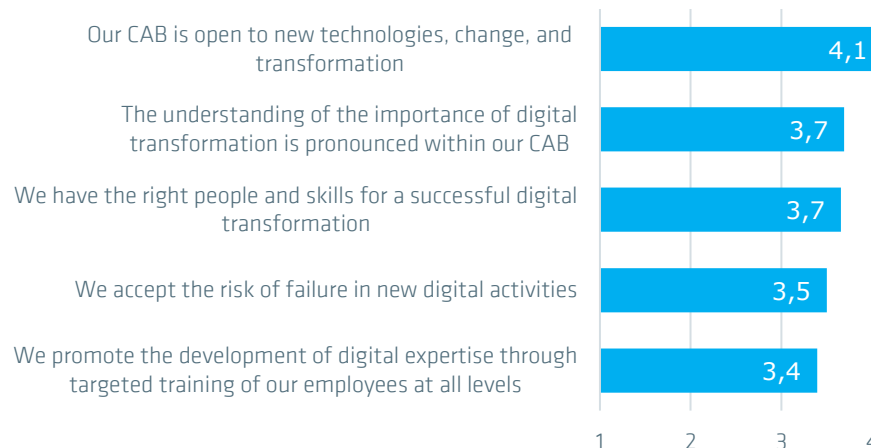
- In most CABs (86%), digitalization plays a central role in their overall strategy, with 68% having a well documented digital strategy.
- Only 56% have set up a Digital Roadmap and 60% use key metrics to measure the implementation status of their digitalization strategy.
- At least 74% of CABs are aware of, invest in and are able to use digital technologies properly while complying with IT security regulations. 78% of CABs have networked their processes and automated routine procedures.

Dimensions of digital maturity: Detailed overview

Customers (n=56)



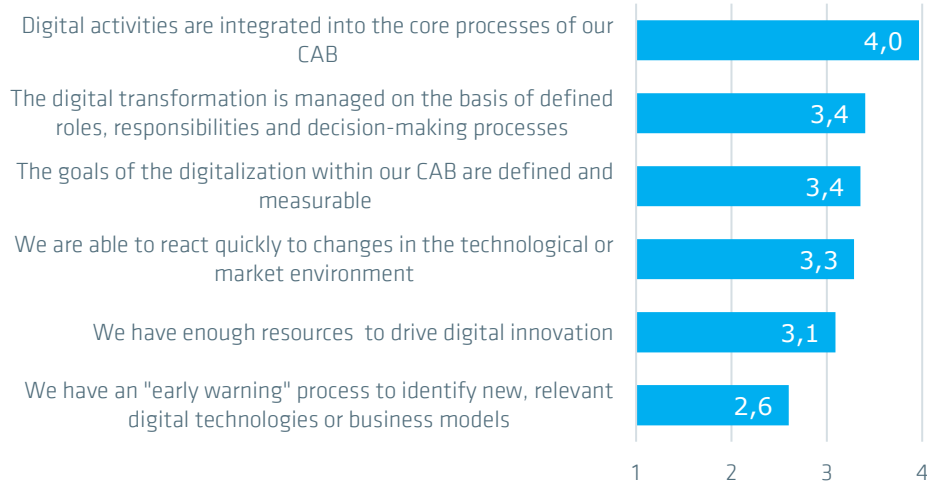
Culture & Expertise (n=56)



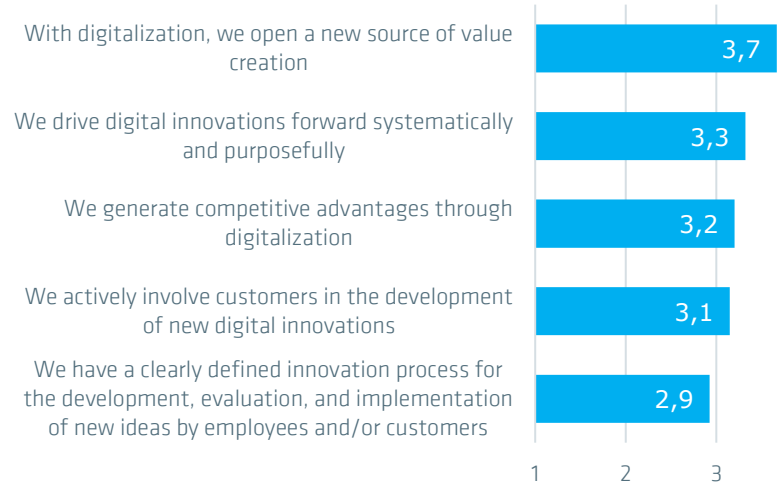
- 80% of CABs in the UK interact with their customers via digital channels.
- 72% offer digitally integrated services to customers and only 64% of them develop appropriate digital solutions based on customer needs.
- British CABs are definitely open to new technologies, changes and transformations (82%). 74% of them have a strong understanding of the importance of digital transformation and have the right skills to successfully implement the change.

Dimensions of digital maturity: Detailed overview

Organization & Change Management (n=56)

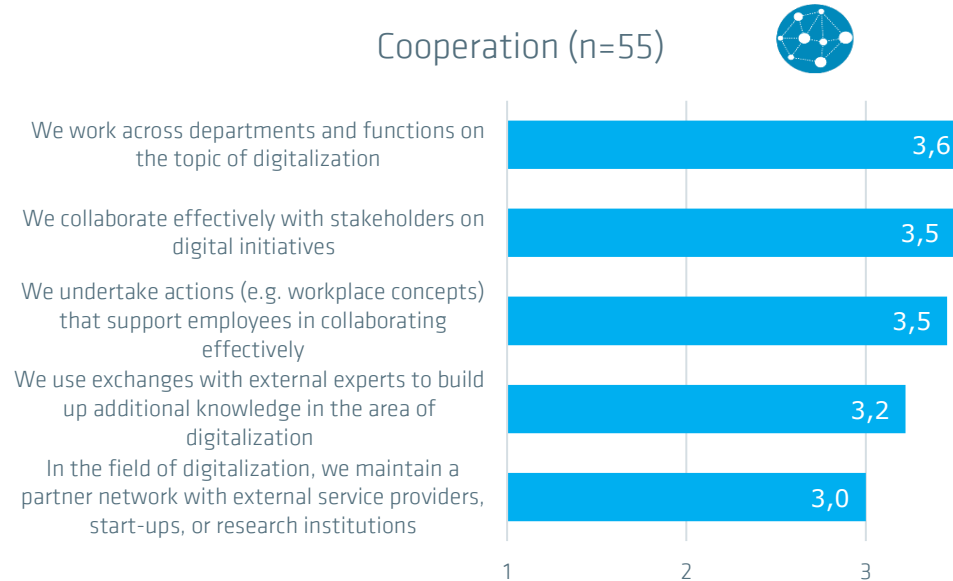


Innovation (n=55)



- 80% 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.
- For the majority of participants (74%), digitalization represents a new source of value creation.
- However, customers are hardly involved in the innovation process.

Dimensions of digital maturity: Detailed overview



- In order to work on the topic of digitalization (72%) across departments and functions, 64% of CABs build additional knowledge through external expert consultations. They also collaborate effectively with stakeholders on various digital activities.
- 60% maintain a partner network with external service providers.

Digital Maturity Model Cluster 1 (Beginner)

Description Level 1: Beginner

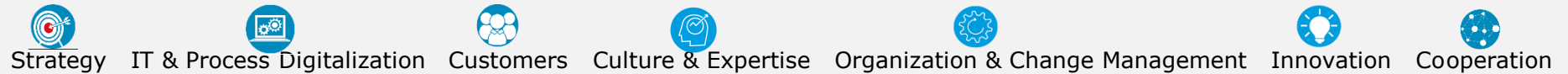
Dimensions










Digitalization has a central role in our overall strategy


Our employees are aware of important rules of conduct for IT Security and their compliance is regularly checked

Our CAB is open to new technologies, change, and transformation

















Digital Maturity Model Cluster 2

Description Level 2	Dimensions						
							
We evaluate new technologies as well as changes in customer behavior to identify potential for digital innovation							
Our processes are already networked through IT							
We know the most important digital technologies and that they can have an impact on CA							
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							
The provision of services for customers, as well as customer care are digitally integrated, and personalized							
Customer data is analyzed, and relevant actions are taken accordingly							
The understanding of the importance of digital transformation is pronounced within our CAB							
We have the right people and skills for a successful digital transformation							
Digital activities are integrated into the core processes of our CAB							








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


Digital Maturity Model Cluster 3


Description Level 3	Dimensions						
							
Our digital strategy is well documented and communicated	■						
We exploit the latest digital opportunities to automate our routine processes		■					
We systematically and specifically analyze customer needs in order to develop appropriate digital solutions			■				
We accept the risk of failure in new digital activities				■			
We promote the development of digital expertise through targeted training of our employees at all levels				■			
The digital transformation is managed on the basis of defined roles, responsibilities and decision-making processes				■			
We are able to react quickly to changes in the technological or market environment				■			
With digitalization, we open a new source of value creation					■		
We work across departments and functions on the topic of digitalization						■	
We collaborate effectively with stakeholders on digital initiatives						■	
We undertake actions (e.g. workplace concepts) that support employees in collaborating effectively						■	


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


Digital Maturity Model Cluster 4


Description Level 4	Dimensions						
							
We have clearly defined the responsibilities for implementing the goals derived from the strategic consideration on digitalization	■						
The goals of the digitalization within our CAB are defined and measurable					■		
We have enough resources to drive digital innovation					■		
We drive digital innovations forward systematically and purposefully						■	
We actively involve customers in the development of new digital innovations						■	
We generate competitive advantages through digitalization						■	
We use exchanges with external experts to build up additional knowledge in the area of digitalization							■



Strategy



IT & Process Digitalization


Customers


Culture & Expertise


Organization & Change Management


Innovation


Cooperation

Digital Maturity Model Cluster 5 Experts

Description Level 5: Expert

Dimensions



We use key metrics to measure the implementation status of its digitalization strategy

We have defined a step-by-step implementation plan (Digital Roadmap) for achieving the goals

We have an "early warning" process to identify new, relevant digital technologies or business models for us

We have a clearly defined innovation process for the development, evaluation, and implementation of new ideas by employees and/or customers

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
■						
■						
				■		
					■	
						■

