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L'ENTE ITALIANO DI ACCREDITAMENTO



Survey on-line: Digitalization in Conformity Assessment in Italy



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Summary of main results

A study carried out by ACCREDIA in cooperation with the federal institute for materials research and testing (BAM)

“Digitalization in Conformity Assessment in Italy”: a general overview

Basic statistical population for the survey	≈2,200 accredited conformity assessment bodies (CABs) in Italy
Data collection method	On-line survey
Survey period	January 10, 2022 February 4, 2022
Sample	114 fully completed questionnaires (= 5.2% response rate)



“Digitalization in Conformity Assessment in Italy”: a general overview (1)

Major topic areas covered:

Digital Maturity Level

Assessment of digital maturity of the CABs in Italy 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)

Corona Situation

What effects has the pandemic had on the digital transformation processes of CABs

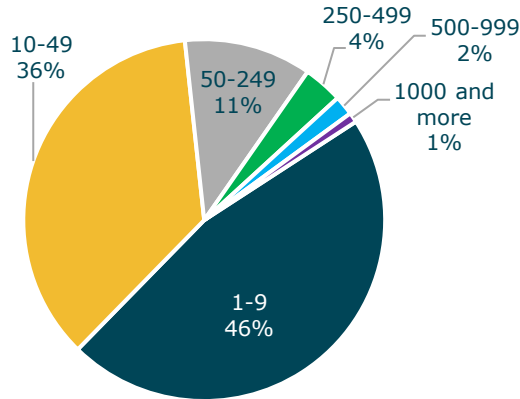
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114 Conformity Assessment Bodies (CABs) joined the survey:

- 82% of the respondents are small enterprises with less than 50 employees
- over half (53%) of the respondents are independent companies

Number of employees

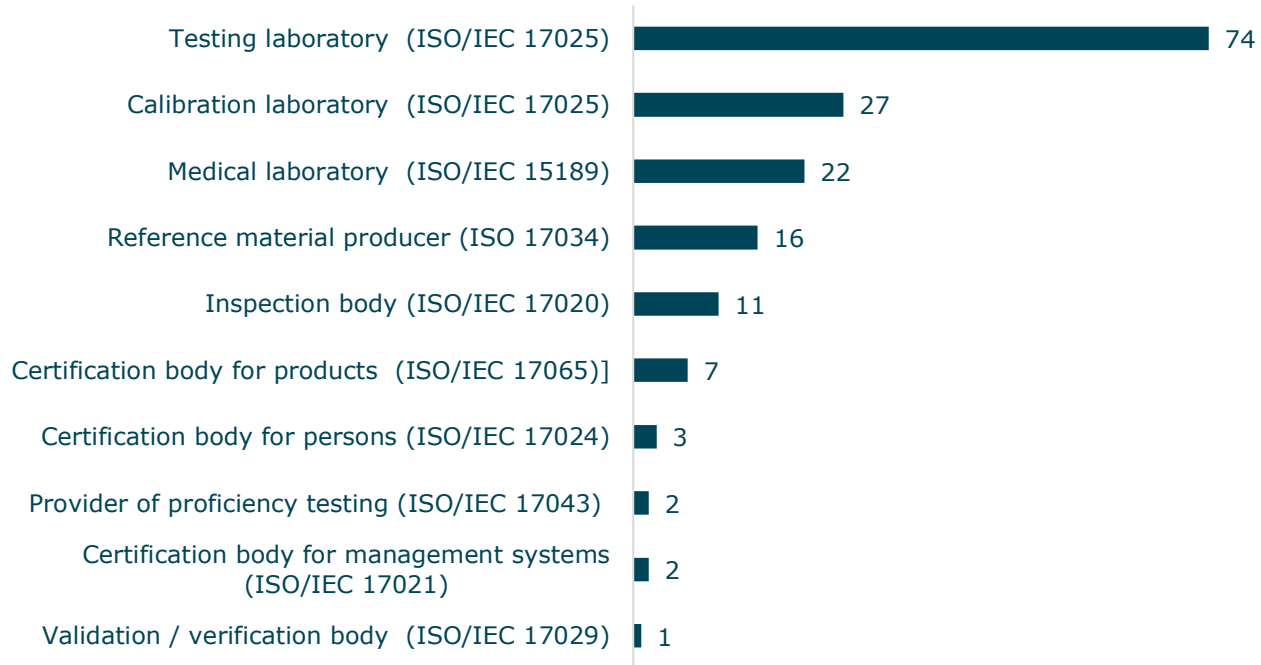


Type of organization



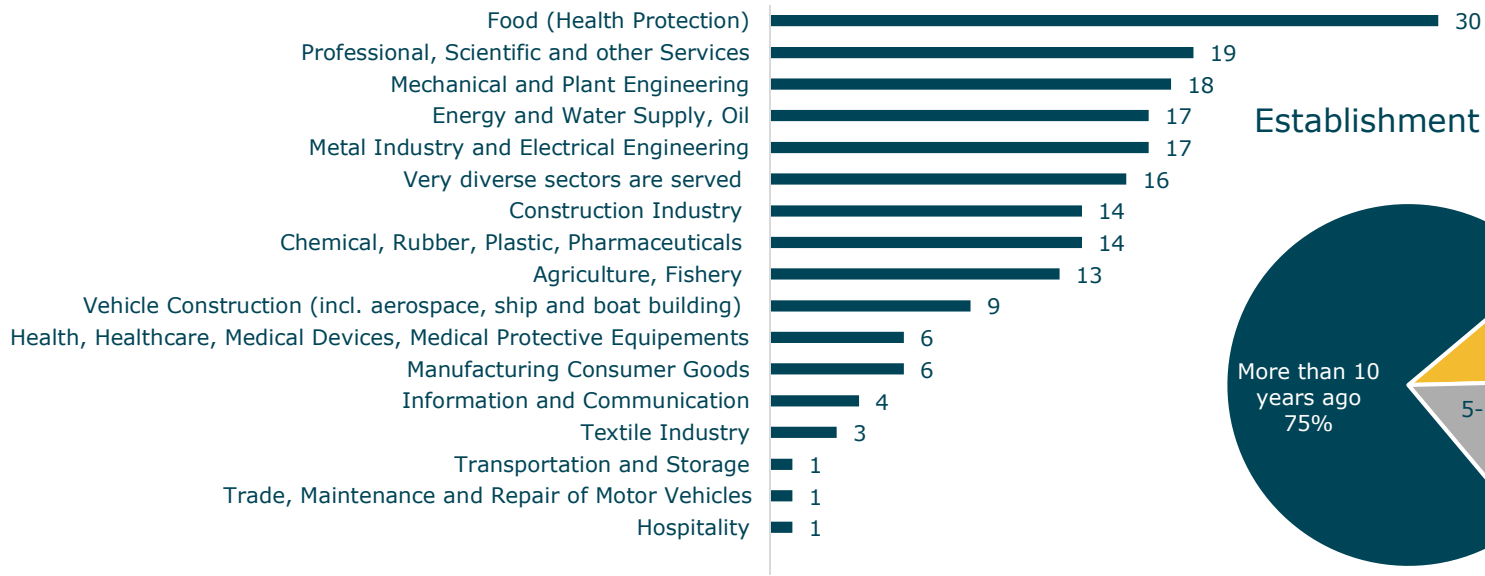
The majority of respondents are testing laboratories

Type of conformity assessment activity

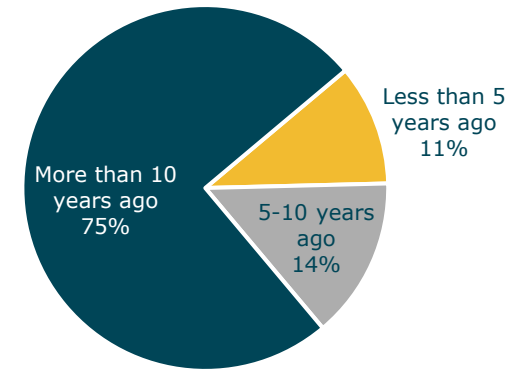


**Food (Health Protection) is the most served sector by respondents;
and 75% of the sample has been established for more than 10 years**

Main sectors served by respondents



Establishment date

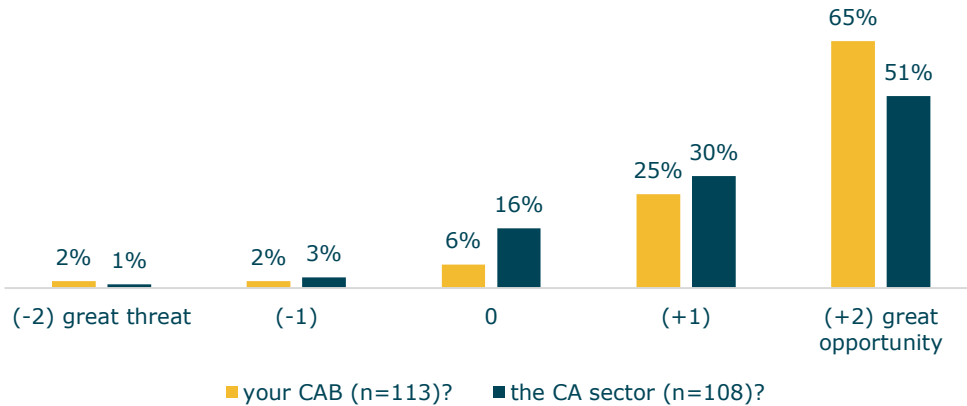


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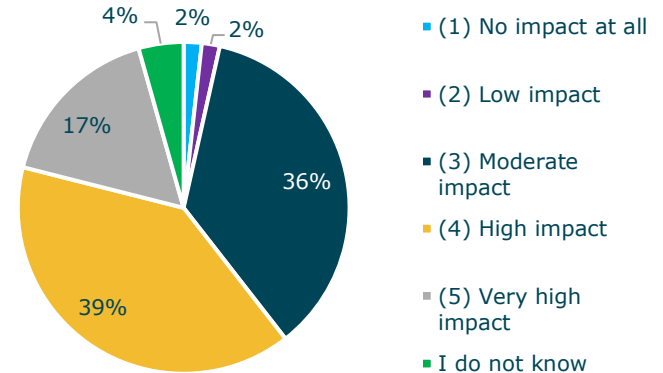
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Digitalization is perceived as an opportunity, more than 90% of respondents recognize the benefits. More than half of the CABs foresee a strong impact on activities due to digitalization in the coming years

For the CAB and, in general, for the market, digitalization is seen as...

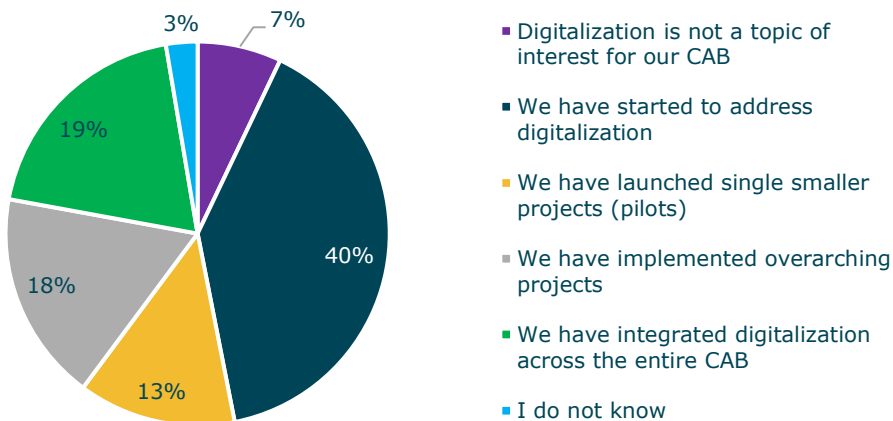


Impact of digitalization in the next 5-10 years (n = 114)

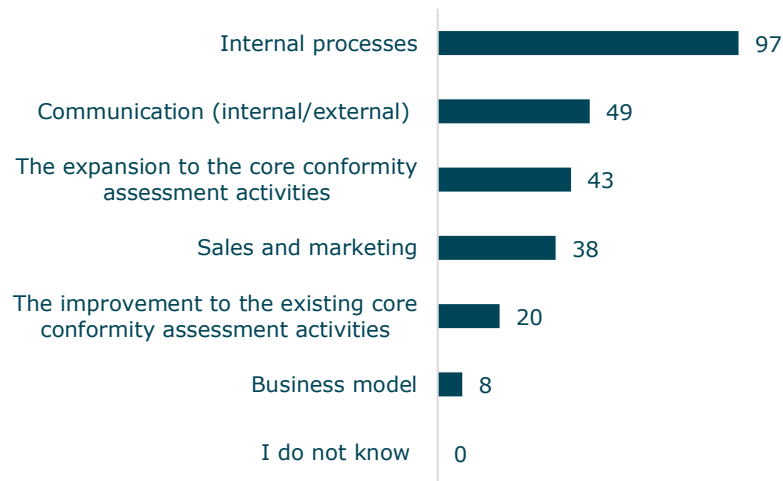


The level of digitalization is highly variable: 40% of CABs have just started a digitalization process, 13% have already started some pilot projects and 18% have developed a general strategy; 19% have already digitized all processes. Most of the digitalization activities concerned internal processes

Status and scope of digitalization (n = 113)

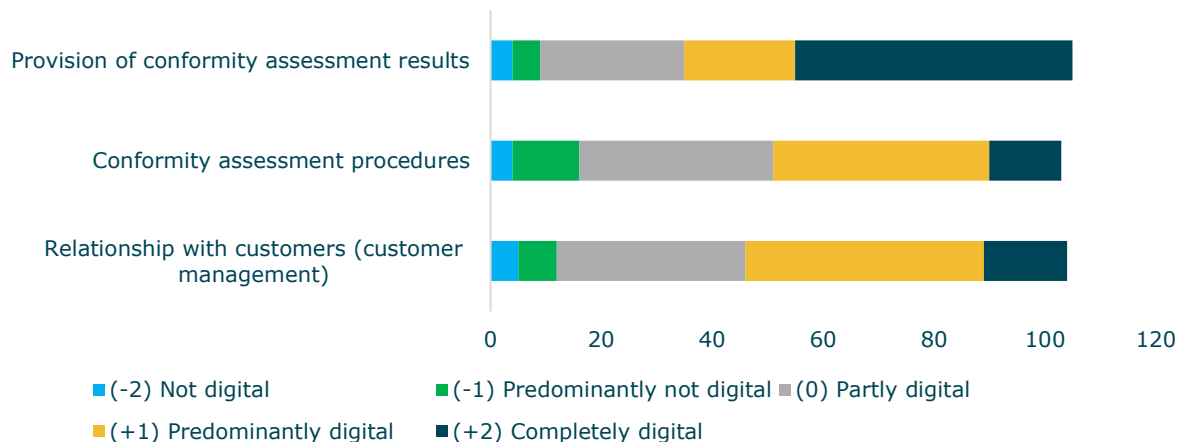


Areas targeted by digitalization (multiple answers possible, n=114)

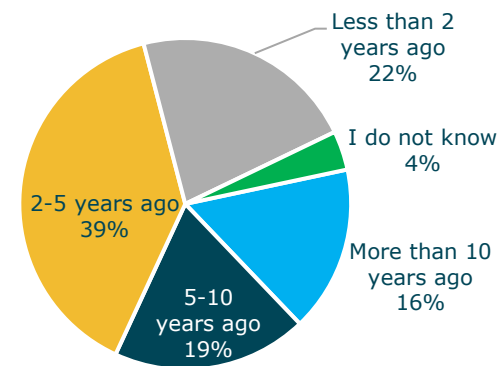


Positive self-assessment of the level of digitalization in specific business areas such as the provision of conformity assessment results. Most of the respondents started dealing with digitalization in the last 5 years

Self-assessment on the level of digitalization in specific areas of activity (n = 106)



The CAB started to deal with digitalization...(n=105)

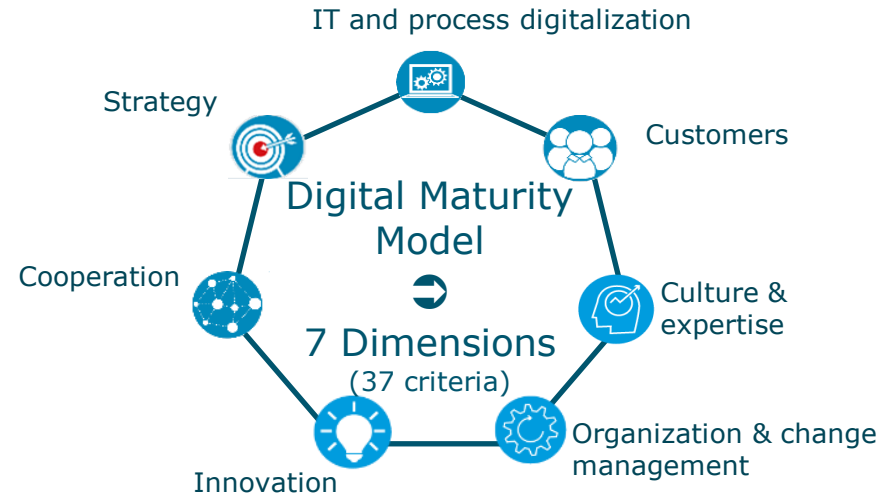


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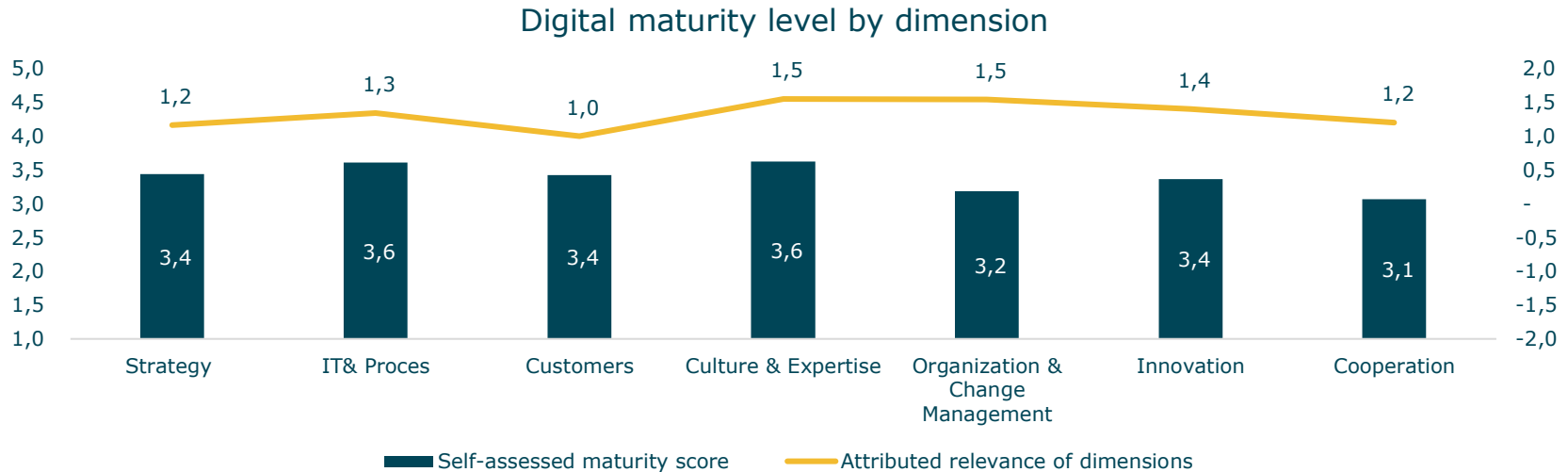
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Digital Maturity Model

- The level of digital maturity reflects the state of digital transformation of an organization and includes technical, organizational and strategical aspects.
- The process that leads to a high level of digital maturity requires commitment, skills and resources that involve different areas of the organization.
- The model uses different dimensions and criteria:
 - 7 dimensions for digital transformation: from technological to organizational and cultural aspects.
 - Each dimension is measured through specific criteria that describe the success factors in terms of commitment, skills and resources.
- Through a self-assessment of the CABs regarding these criteria, it was possible to assign a synthetic level of digital maturity: from 1- beginner, to 5-expert.

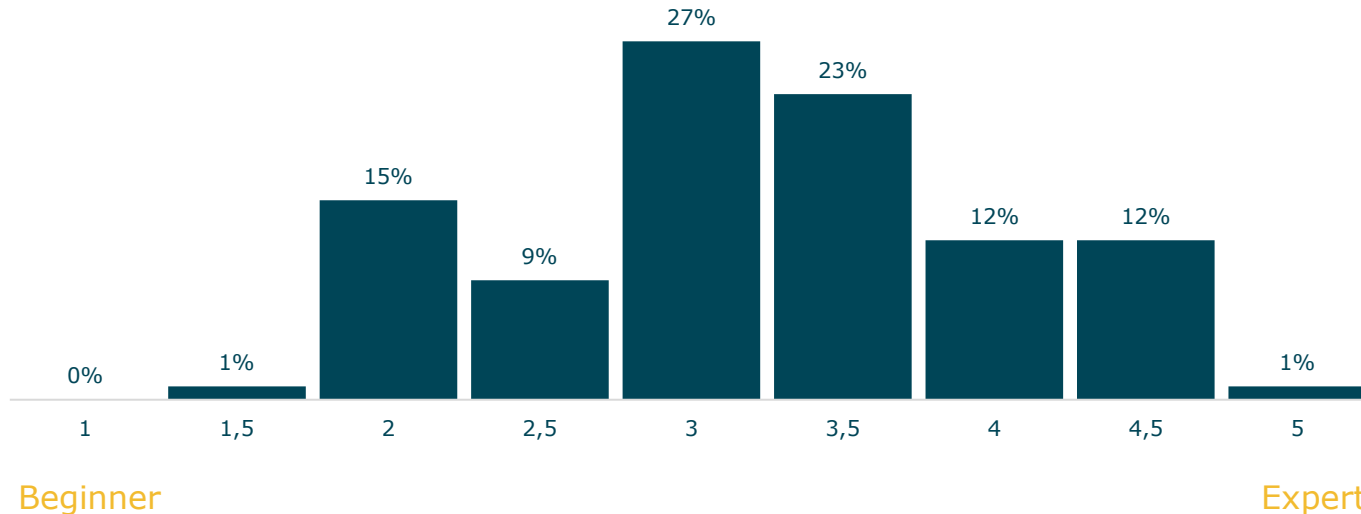


The level of digital maturity varies depending on the dimension: it is higher in the "Information technology and digitalization of processes" and "Culture and expertise" dimensions, while it is more contained in "Organization and change management" and "Cooperation"



Half of the responding CABs reached an intermediate digital maturity level (3 - 3.5), while only 1% reached a complete digital maturity level; all responding CABs have undertaken a digitalization process (no CAB has a digital maturity level equal to 1)

Distribution of respondents by digital maturity level (n = 114)

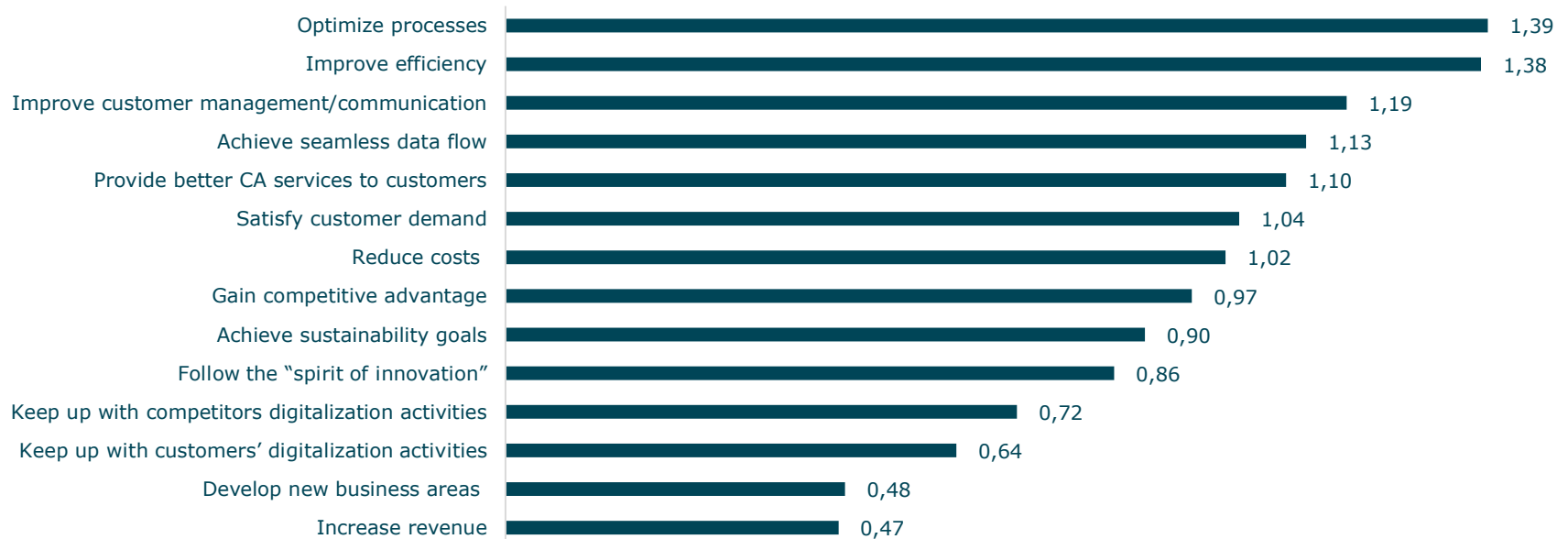


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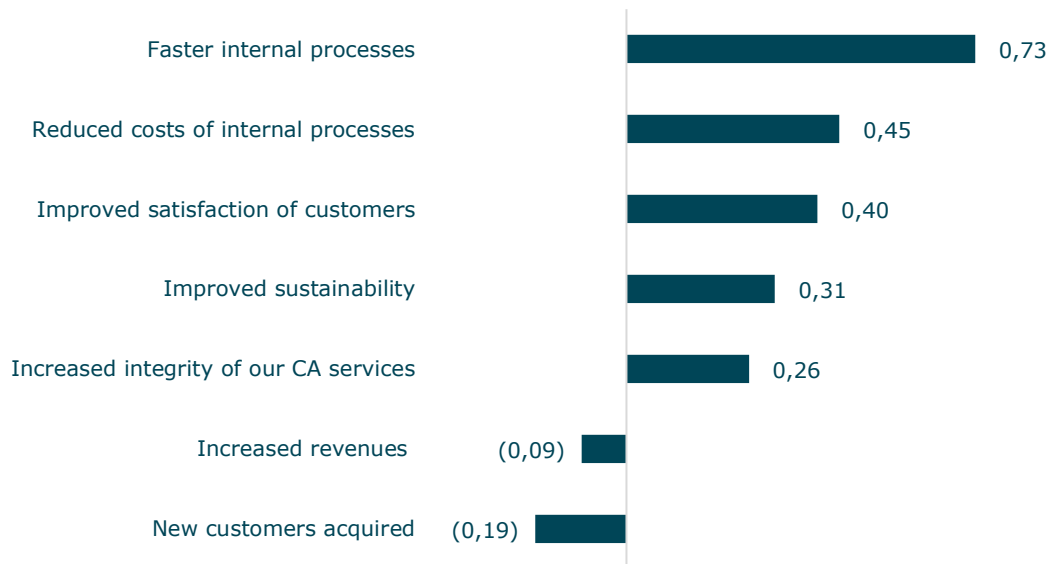
Process optimization and efficiency improvement are the main objectives that lead CABs to start a digital transformation path

Goals behind the digitalization efforts (n=106)
(on a scale from (-2) - does not apply - to (+2) - fully applies)



Digitalization improves the speed of internal processes and reduces their cost, contributing to the improvement of customer satisfaction

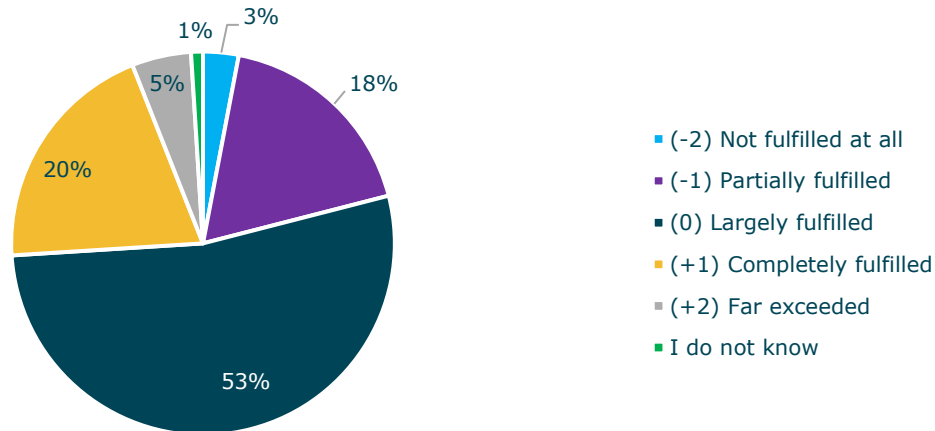
Digitalization benefits (n = 103)
(on a scale from (-2) - does not apply - to (+2) - fully applies)



CABs' expectations are mostly met:

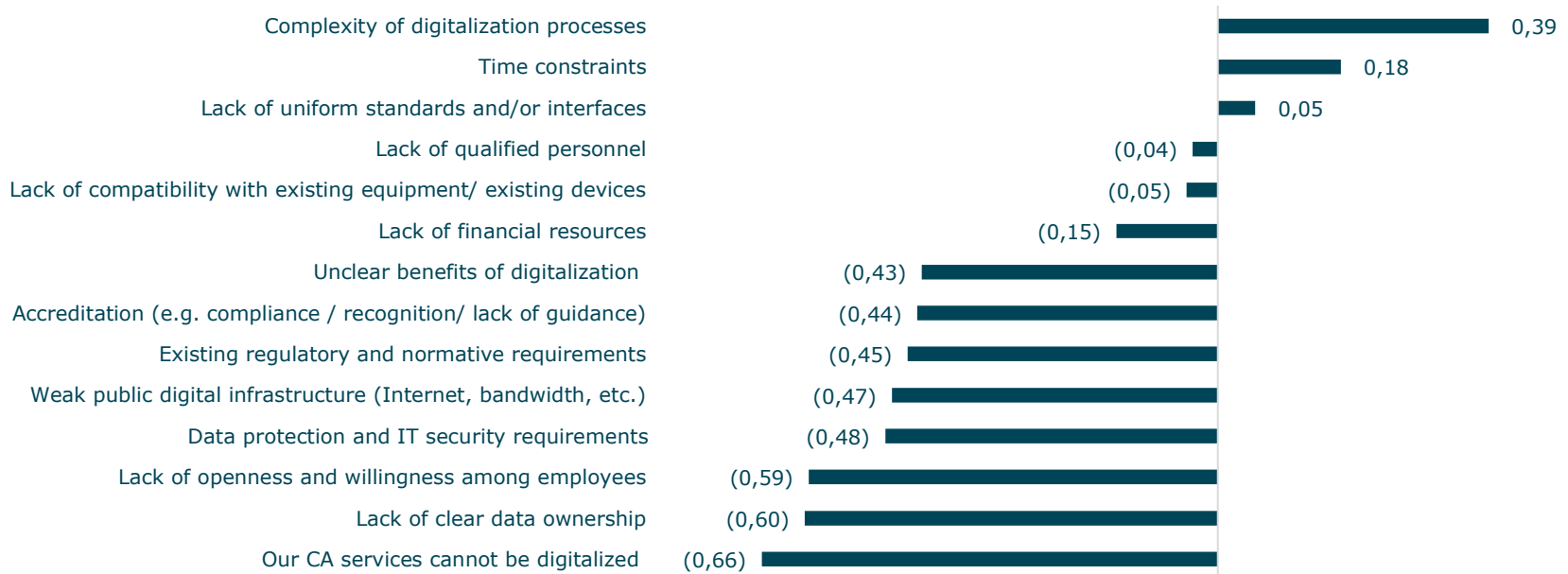
- 73% of respondents consider their expectations regarding digitalization to be mostly met***
- 1 out of 5 CABs is completely satisfied***
- 18% of respondents say they are only partially satisfied***

With regard to the expectations on the introduction of digital processes / technologies I am ... (n = 100)



The main barriers to digitalisation are the complexity of the processes and the time it takes to transition

Barriers to digitalization (n=114)
(on a scale from (-2) - does not apply - to (+2) - fully applies)

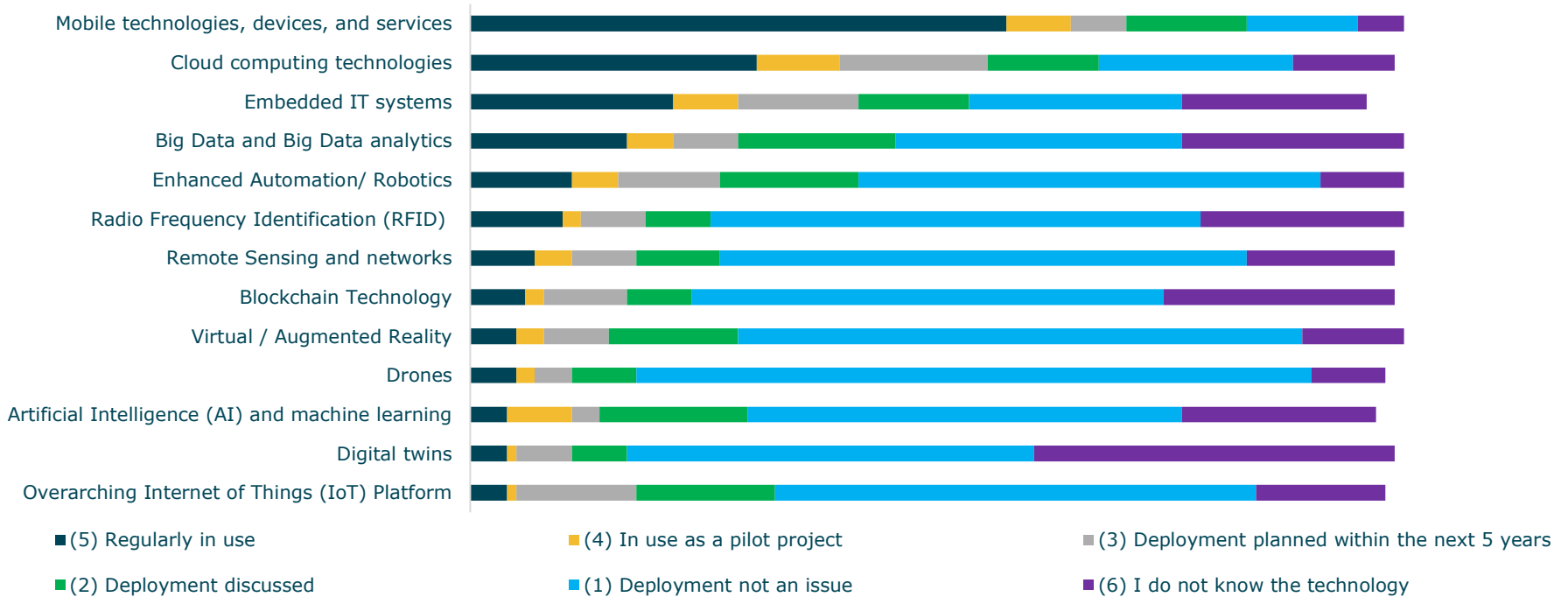


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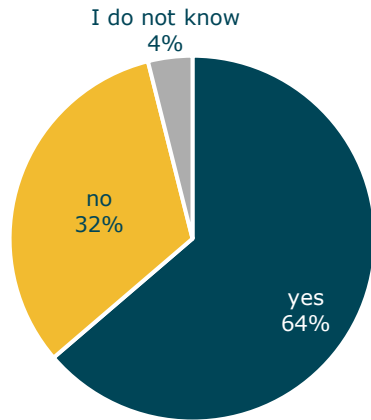
Not all new technologies are widespread among the responding CABs

Technologies used or planned to be introduced (n = 101)

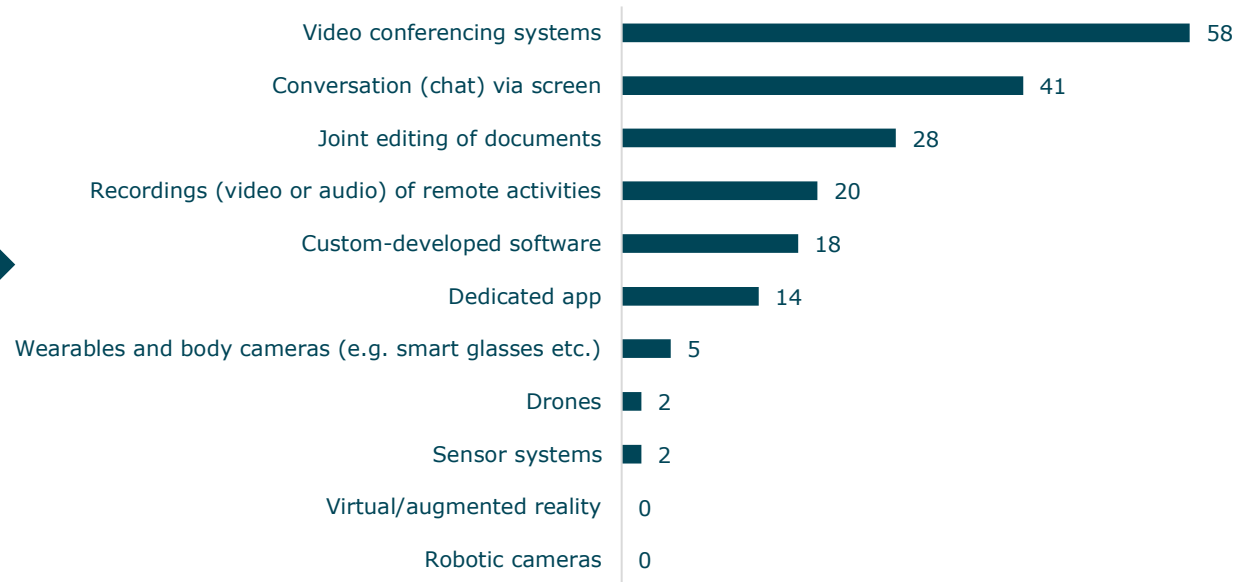


"Remote" methods and technologies are widely used, in particular live video conferencing systems

Usage of remote methods (n = 102)

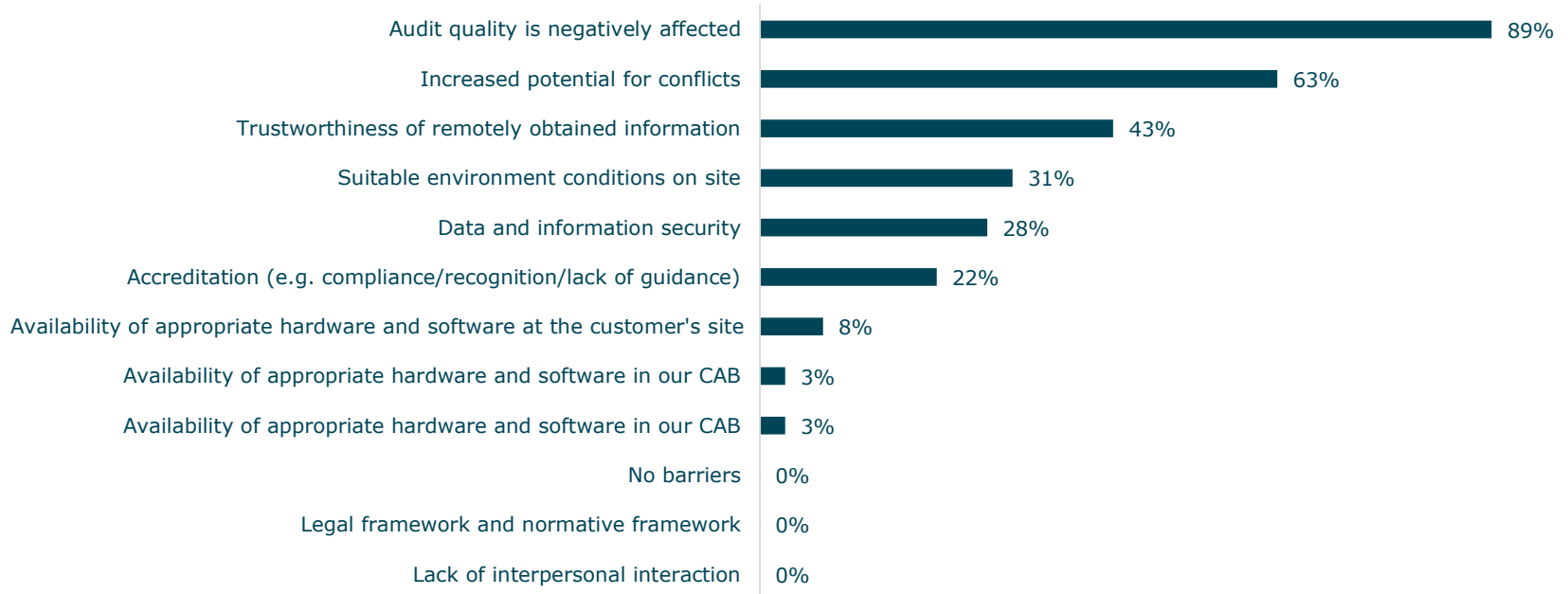


Technologies used for remote procedures (n=65)



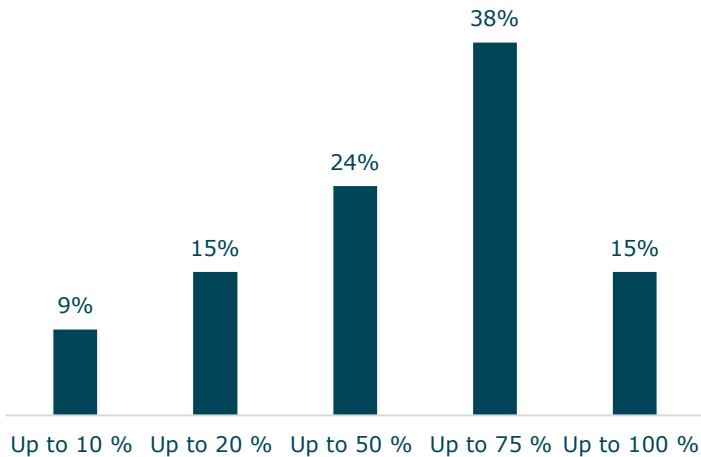
The main barriers encountered in remote procedures concern the quality of the audit and the potential for conflicts

Barriers (n=65)

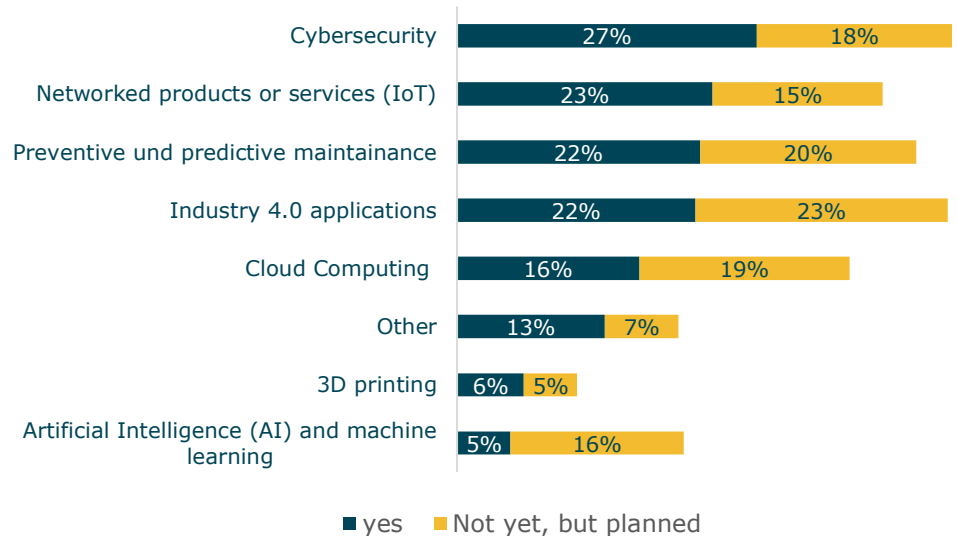


The majority of CABs have digitized only a part of their routine processes - the conformity assessment services mainly sold to the market concern "cybersecurity" and "IoT"

Share of digitalized routine processes (n = 102)



Digital products and applications for which CA is conducted (n=79)

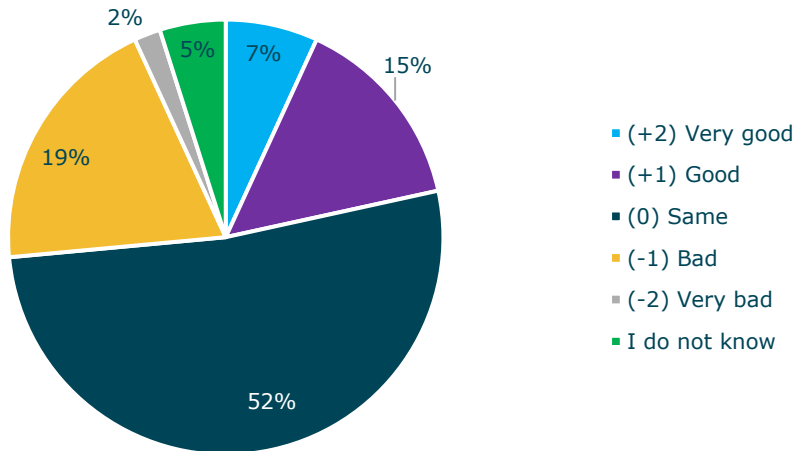


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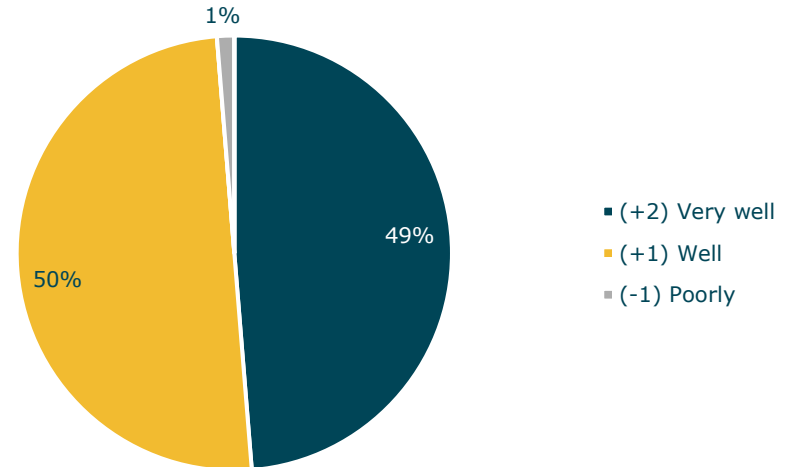
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Most of the responding CABs did not verify a worsening of orders, nor significant consequences in terms of skills and work capacity as a result of COVID-19

CABs' order situation in 2021 compared to pre-COVID-19 times (n=102)

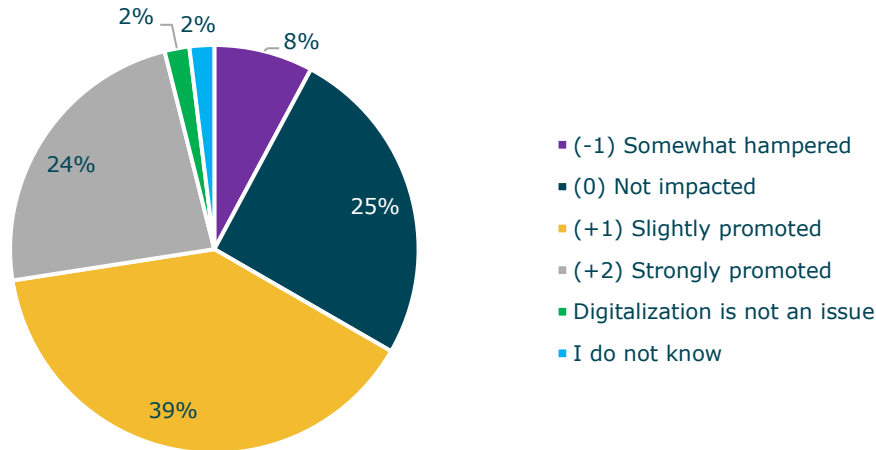


Response to the challenges of the COVID-19 pandemic (n=78)

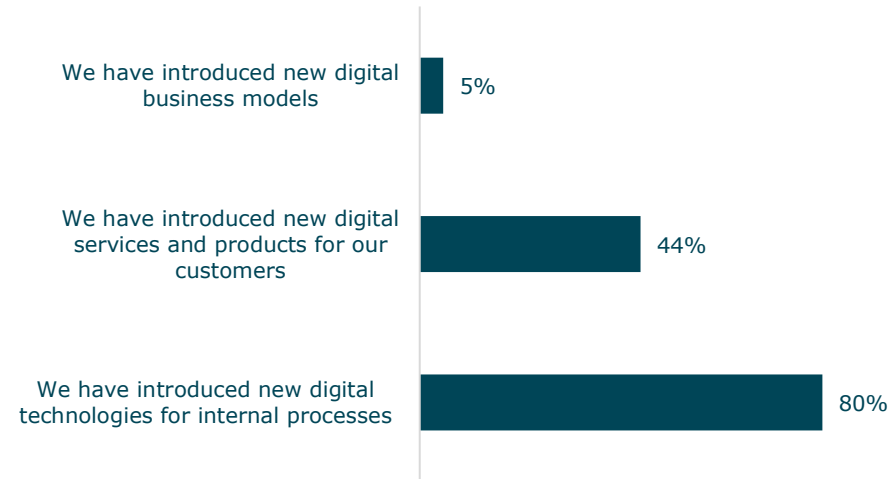


The COVID-19 pandemic has positively contributed to the development of digitalization processes, in particular through the introduction of new technologies for internal processes

Impact of the Covid-19 pandemic on the digitalization of CABs (n=102)



Digital adaptation in course of the COVID-19 pandemic (n=64)



Final remarks

- Responding CABs see digital transformation as an opportunity and most of them have an intermediate level of digital maturity;
- Digitalization is a strategic choice for every organization, but it is possible to verify a typical scheme: an initial introduction of new technologies is followed by an overall transformation process that leads to a high level of collaboration and awareness;
- It is surprising to verify that many of the new technologies (blockchain, artificial intelligence, big data analytics) have not yet found a practical application among the responding CABs;
- Through digitalization, CABs aim to improve internal processes; the routine processes have been largely digitalized.



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