

Second Workshop on Strategic Management

in the scope of activities of the EURAMET-WELMEC FG-FNMID

Belgrade, 12 and 13 March, 2015



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1 Introduction

Context and Objective

In the context of Institutional Capacity Development, the issue of "strategic management" has been identified as one priority of activities within the EURAMET FG. The identified challenges for the NMI were as follows: analyzing the environment in which the emerging NMI operates, then making a series of strategic decisions about how the NMI will fulfil its duties in future. Formulation ends with a series of goals or objectives and measures for the NMI to pursue. This will create a roadmap where to go.

In order to assist NMI managers in the development or improvement of the strategic orientation of their NMI and in their strategic management, some theoretical background were to be provided as well as practical guidance through case studies, exchange of experiences and self-assessments.

The following objectives were identified for the entire process:

- ⇒ level of participants: increased knowledge about strategic management
- ⇒ level of NMI: generation of ideas and orientation about priorities for NMI development, better position to successfully prepare research projects
- ⇒ level of network/FG: platform to discuss regional cooperation and orientation for further capacity development

Process

The Capacity development process consists of three successive steps:

Step 1: A first workshop was held in Belgrade from December 4 to 5, 2014 with 18 participants from 9 different NMI, EURAMET and PTB. The programme consisted in the following elements (see also report of the workshop):

- ⇒ General training of strategic management and strategy development against the background of NMI requirements
- ⇒ presentation of case studies
- ⇒ exchange of experiences concerning important issues in strategic management and strategy development

Step 2: Further analysis and development of a strategy according to the priorities of each NMI. Participants of the workshop (step 1) analysed more in depth the environment of their NMI as well as the strengths and weaknesses of their institute with the support of the tools and experiences shared in the workshop. They clarified their scope of strategy and priorities for their NMI.

Step 3: Sharing of gained experiences and detailed discussion on regional cooperation. Information about Research Potential. In a final round the prepared draft strategy elements and landscapes were presented and discussed. They also served as a basis for a more in depth discussion of regional cooperation. Necessary future support was also identified.

The workshop (step 3) was held in Belgrade from March 12 - 13, 2015 with 13 participants from 8 different NMI and EURAMET (see also list in the annex). The programme consisted in the following elements:

- ⇒ After the opening and the introduction, participants reflected and shared their highlights of the first workshop. Oliver Karkoschka completed with some summary of the workshop points (see presentation).
- ⇒ Tanasko Tasić gave an outlook about the programme and highlights of the workshop (see presentation).
- ⇒ Participants shared their experiences since the first workshop in groups and discussed in the plenary.
- ⇒ Information about the Research Potential and other information about EURAMET and the FG.
- ⇒ Discussion about the regional cooperation.
- ⇒ Lessons learnt, conclusions and evaluation.

See also the detailed programme in the annex.

This report gives a short summary of the process and results of step 3.

The annex includes the programme, list of participants as well as they handout. All presentations are being shared in different files.



2 Exchange of experiences with strategy development

The experiences since the workshop in December were exchanged in three groups. A summary was shared in the plenary. All elements refer also to the templates which are available for all NMIs in separate files.

Needs analysis	<p>Important stakeholders were: energy, industry, small and medium enterprises</p> <p>Methods: direct meetings, workshops, daily communication and monitoring of requests</p>
Priority areas of development and measurement capacities to be developed	<ol style="list-style-type: none"> 1. Laboratory for calibration in radon concentration in air 2. Verification of Electric meters 3. Metrology in chemistry (breath analyser, control of precious metals) 1. Development of metrology in chemistry 2. Development of metrology of ultrasounds 1. Legal verification of current and voltage instrument transformers (metrology in chemistry, time and frequency, acoustics and sounds)
Organisational development and human capacities to be developed	<p>New measurement methods in the domain of chemistry.</p> <p>Collaboration with other NMI another MP project.</p> <p>IPA 2014 - 2020</p> <p>Development of a quality management system in accordance with ISO 17020 with accreditation</p> <p>External support (funds, training, establishment of new labs in energy, time and frequency, acoustics)</p>
The strategy as part of a broader development perspective	<p>Strategy of "free movement of goods", Strategy of the Ministry of economy, IPA 2011</p> <p>Mass measurement domain is very important for strategy development.</p> <p>More support from the Ministry of economy and industry is required.</p> <p>Needs of the stakeholders were in important element of the strategic plan.</p> <p>Surveys, analysis of calibrations (amount and kind)</p> <p>More contact of the governmental bodies and industry</p> <p>Supporters are government, cooperation project, industry</p>
Conclusions and lessons learnt	<p>Surveys don't work, people do not answer</p> <p>Increased contacts with the stakeholders are necessary</p> <p>Challenges: declaration of CMC in all fields, Small budget</p>

Needs analysis	information from nominated laboratories and BIH meetings and questionnaires (Serbia) IPA 2 Project that includes questionnaires (Kosovo)
Priority areas of development and measurement capacities to be developed	Chemistry metrology (Serbia) final customer (Kosovo) bringing to final service already started projects (BiH) primary calibration were based already exists (BiH)
Organisational development and human capacities to be developed	efficient exchange of all relevant metrology related information (Online) no further employment possible new internal organisation (BiH) removal of all administrative barriers in the area of metrology (BiH)
The strategy as part of a broader development perspective	quality infrastructure exchange of positive experiences this page different models
Conclusions and lessons learnt	To create realistic and needs oriented national metrology strategies To exchange national strategies with regional NMIs in order to adjust each other and to harmonise with EU



Needs analysis	How to make appropriate questionnaires for the needs of different kinds of stakeholders how to educate users of our services based on analysis of the in appropriate requests
Priority areas of development and measurement capacities to be developed	Traceability in metrology in chemistry (workshops, assessment of needs) Radiation thermometry
Organisational development and human capacities to be developed	Develop networking for MIC Capacity development for research
The strategy as part of a broader development perspective	Increasing and the level of technical knowledge and for quality management
Conclusions and lessons learnt	More exchange is required among the participating and interested countries. An idea was presented for web solution for presentation of development needs and intentions of particular NMI.

Discussion

Needs analysis: Direct contacts are much more useful to identify specific needs of industry. Needs can also be discussed during service provision and trainings.

However, a survey with questionnaires can be useful to have an overview, for example regarding new industry areas and new clients. But they do not allow the identification of specific needs and have to be completed by direct contexts, even in a smaller scale. Major challenges are the identification of the persons who are actually filling out the forms and also the low percentage of return. Sometimes also the type of questions have to be improved and invested in.

Organisational and human capacity development: only a low degree of measures can be financed by the NMIs. This shows the importance of the FG for capacity development. A good practise is that participants provide in-house trainings to other NMI staff once they return from the training.

Some measures of organisational development can be financed with own resources of the NMI e.g. through income from services. The capacity development measures are all part of a bigger strategy and are closely linked to secure knowledge in the NMIs.

Lessons learnt: an important element of the exchange of experience and information as well as capacity development are bilateral MoUs. All participants stressed the need to enhance exchange of experience among the NMIs of the Balkan countries.

3 Information about the RPot

Tanasko Tasić gave information about EMPIR, RPot and relevant activities of the FG (see separate file).

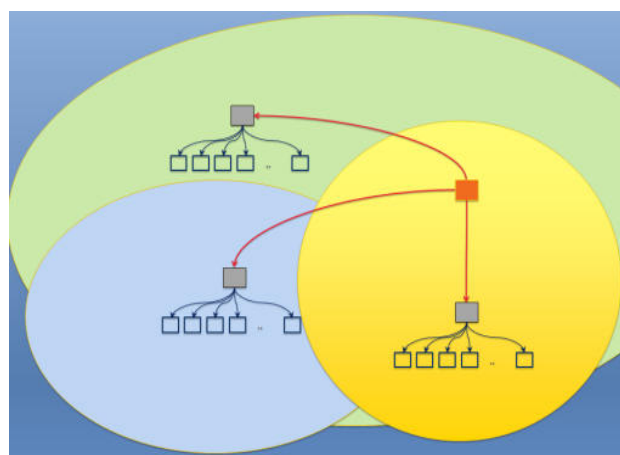
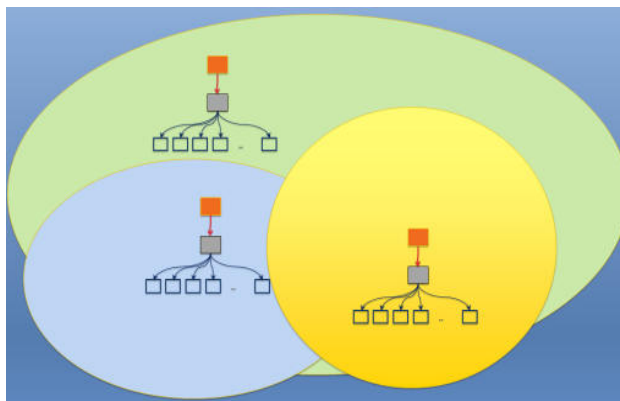
4 Regional cooperation

Tanasko Tasić gave an introduction and presented all existing CMC and other specialisations of participating NMIs. He also initiated a reflection from the perspective of the local customers.

Usually it is the most convenient way for the customers to satisfy metrology needs within the country (local language, speed of service).

Since the specialised services may not be available in each country, customers' needs can also be satisfied in other countries of the region.

However, in case of calibration of local (reference) standards, there is no need to develop capacities for relevant metrology areas in each country. It is much more effective if such traceability is assured in a regional coordinated way (i.e. NMIs may agree on distribution of higher level tasks - specialisation for particular areas). A good example for that has been presented by NSAI Ireland during the first part of the workshop in December 2014.



Existing Specialisations

The yellow cards of the following table (see picture) gave an overview about existing specialisations among participating NMIs:

Existing specialisation and regional collaboration



Subsequently, all planned specialisations were gathered (green cards) and discussed more in detail:

Training on time frequency and dissemination: interest of Macedonia, Bosnia, Montenegro and Albania.

Metrology in chemistry (MiC): there is initiative from Croatia for a workshop on organisation of the MiC system in a country and interest of Macedonia, Montenegro, Serbia, Poland and Albania. The FG will consider organisation of a workshop for management of the MiC system in a country and coordinate specialisations in the different technical areas by the different countries. The workshop will focus on analysis of the specific needs of stakeholders in the countries and proposals for development of capacities. MiC is good opportunity for application of smart specialisation.

Electrical quantities: there is need for the organisation of inter-comparisons and peer reviews. Interested countries are Montenegro and Albania, traceability and collaboration will be organised with the DI of Serbia. There is also the possibility to organise joint trainings within EMPIR projects (by Serbia, Bosnia, Turkey and Germany).

Electrical measuring transformers: Serbia plans to hand-over the equipment to an external company. At the same time, ME and AL need to establish such measurement capacities. It was proposed that DMDM initiates collaboration of 3 countries in this field (if possible, by using existing equipment).

Vibration, acoustics and ultrasound: interest of Macedonia and Poland. Cooperation will include Serbia, Kosovo and Albania.

Thermometry: interest of Kosovo, Poland, Macedonia, Albania, Montenegro and Serbia. There are many sub-fields, cooperation already exists. An EMPIR project screens the existing situation and will develop further recommendations for cooperation. Tanasko Tasić will contact the project leader and inform the interested and concerned countries.

Pressure: interest of Macedonia, Serbia, Montenegro and Albania for the organisation of inter-comparisons and peer-reviews for the preparation of CMCs. Croatia offers support if requested (e.g. training visits).

Ionising Radiation: interest of Bosnia in collaboration with DIs of Serbia and Croatia.

Force: cooperation between Kosovo, Albania and Macedonia (with support from PTB?). Specific potential is: Albania with existing equipment, Croatia with expertise. FG will consider organisation of further cooperation (i.e. workshop for regional coordination of services).

Flow: Bilateral cooperation between Serbia and Macedonia will continue based on the MoU. The FG will consider organisation of a workshop in Macedonia in order to assess the situation and define more concretely the needs as well as for basic training. Interest of Bosnia, Albania, Montenegro.

Length: Serbia and Montenegro, Croatia offers to share expertise.

5 Lessons learnt

Lessons learnt were discussed around each table and shared as follows:

About cooperation

- ⇒ There is a huge space to widen the regional cooperation.
- ⇒ The identification of common needs and interests.
- ⇒ There is generous readiness of participants from more developed NMIs to assist less developed one's.
- ⇒ Cooperation is very important. Without cooperation NMIs cannot develop themselves.
- ⇒ Everyone needs basic facilities for local needs.

- ⇒ MiC is a hot topic for cooperation on the regional level.
- ⇒ Impact on regional collaboration in the chosen domains of metrology.
- ⇒ Small portal for countries needs accessible for everyone.

About strategy development

- ⇒ Determination of the vision and mission of the institution.
- ⇒ Analysis of the present situation and analysis of the needs of metrology users.
- ⇒ Realistic recognition of needs in each country.
- ⇒ Preparation of NMI's strategic documents with attached operational plans.
- ⇒ The identification of human and technical capacities to be developed.
- ⇒ Keeping contacts with the stakeholders on each stage of planning and managing the strategy.

About the training and its style

- ⇒ How to prepare and carry out trainings in such an interactive way, keeping the attention of participants 100%).
- ⇒ Workshops on MIC etc. are important.
- ⇒ Strategy management meetings are useful and should continue.

6 Evaluation

The two workshops / trainings were generally assessed positively. The main benefits were:

- ⇒ better knowledge on the way to prepare strategic plans. Even if not all problems have been solved, a clearer picture exist how to address challenges
- ⇒ the feeling of belonging to other common family of similar NMI's which share similar problems and challenges
- ⇒ discovering the important potential and questions for regional cooperation
- ⇒ the potential for regional cooperation has become clearer which allows more proactive commitment on the regional level instead of only waiting for EURAMET

Participants generally liked also the topics which were addressed and discussed, the environment of the two workshops, the ambiance and the interactive style of communication. Many participants appreciated particularly the openness of discussions and participants

Annex

Annex 1: Programme of the workshop

12 March 2015

08.30	Registration of the participants	
09.00	Opening and welcome	
	Introduction of participants	
	Programme in brief	(Oliver Karkoschka)
	Summary of the 1st part of the training	(Oliver Karkoschka)
	Highlights for the 2nd part of the training	(Tanasko Tasić)
10.30	Coffee break	
11.00	Discussion of NMIs responses to template chapters 1-6 sharing of solutions and problems (3 working groups)	Facilitation: Oliver Karkoschka
	Presentation of outcomes of the group work and plenary discussion	
13.00	Lunch	
14.00	Cont: Presentation of outcomes of the group work and plenary discussion	
14:30	Detailed discussion of open issues of common interest <ul style="list-style-type: none">e.g. staff training, visibility of NMI, ensure financial support to NMI, etc.	Facilitation: Oliver Karkoschka
15.30	Coffee Break	
16.00	Information on Research potential (Stage 1 call, FG-FNMID ideas, RPOT Trainings Sarajevo and Tallinn)	(Tanasko Tasić)
	Supporting information (EURAMET Secretariat)	(Tanasko Tasić)
	End of the first day	
19.00	Short city walk and dinner	

13 March 2014

- 09.00 Template Chapter 7:
 7 – Role and importance of the regional cooperation between NMs (Tanasko Tasić)
 Introduction
- 09.30 Discussion of NMs responses to template chapter 7
 sharing of solutions and problems
 (3 working groups)
- 10.30 Coffee break
- 11:00 Cont: regional cooperation

 Detailed discussion of open issues of common interest
- 12:00 Lessons learnt
 During the last session each participant should present 1-2
 important things he/she learned during the workshop or things (Tanasko Tasić)
 he/she remembers like good example/problem
- 12.30 Summary of the workshop
 Conclusions, next steps
 Evaluation and end of the workshop
- 13.30 Lunch

Annex 2: List of participants

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Poland	Mrs.	Patrycja	Ruśkowska	p.ruskowska@gum.gov.pl

Annex 3: Handout

Questions for the Group discussion: Analysis of the results of the process since December 2014

Exchange with your group members about your experiences. The following questions can serve as an orientation.

1 Analysis of needs

What kind of **stakeholders** did you address? (industry, energy, small-and medium sized enterprises, government agencies, etc.)

What kind of **methods** did you use for the needs analysis?

What are important **new informations** that you have obtained from the needs analysis?

What did you already know before? What has surprised you?

What kind **experiences** have you made with the different methods?

What are **advantages and disadvantages** of the different methods:

- Surveys / Questionnaires
- Direct meetings and discussions, workshops
- Monitoring of requests
- Others, etc.

Differences between stakeholders: For what stakeholders did you analyse the need? Which stakeholders are easier to access than others? Why?

Who carried out the needs analysis? (staff, experts, etc.) What are your experiences?

To what extent have **relations to key-stakeholders strengthened** due to the need analysis?

Do you have **regular mechanisms** to analyse / enquire about the needs of clients?

Do you have **systematic feed-back mechanisms** from clients?

What were **other sources** where existing needs can be found? (e.g. documents)

How do you assess the **benefits** of the needs analysis compared to the **costs**?

Based on your experiences, what are your main **lessons learnt and recommendations** for the future?

What are **challenges**? What do you plan for the future?

⇒ Write your main ideas on cards

2 and 3 Decisions on priority areas of development and Measurement capacities to be developed

Exchange on the **priority areas of development** of your institute. Is it a list of priorities or a list of desired developments? What is key-priority for you / for other stakeholders?

How did you **translate** the results of the needs analysis into **priority areas of development**? To what extent did also **future developments** play a role in addition to present current needs?

What was the **importance of the needs analysis**? What **other orientations** played a role for the identification of priority areas of development? (e.g. political decision, requests from ministries, technical interests, etc.)

Which needs to you address with more priority than others? What are important reasons / **factors** which play a role in **defining priorities**?

To what extent did the following aspects play a role in the decision -making on priorities:

- financial aspects
- collaboration with other NMI
- available human resources

Do you have a concrete **objective for the strategic development** of your institute?

Do you have a **time plan** for the development of services and capacities?

Do you have an **action plan** for the development of services and capacities?

Did you carry out any **financial analysis** e.g. cost/benefit analysis?

Did you analyse the **risks** related to the investments?

⇒ Write your main ideas on cards

4 and 5 Organisational capacities and human capacities to be developed

To what extent are the **organisational development aspects related to the priority areas** of development? (services, capacities etc. under 2 and 3)?

How concrete is the organisational development already **planned**?

What kind of **external support** will you require (funds, experts, etc.)?

What will be the **result of the development processes**?

What role can be played by **other NMI** (e.g. exchange of experiences,

⇒ Write your main ideas on cards

6 Integration of the reflections into a broader strategy, development perspective

To what extent are above mentioned elements part of a **broader strategy or development**?

Who are major **supporters** of the described development ?

What are major **stakeholders which have to be convinced, informed**, etc.? It means that action is required by the NMI. What kind of action do you intend?

⇒ Write your main ideas on cards

Conclusion and Lessons learned

Based on this process, what are **major lessons learnt**?

What were your important **resources / knowledge / skills / expertise** which have **helped you** to do the needs analysis and identification of priorities for development?

What are important resources / knowledge / skills / expertise you **were lacking**?

What would you make **again** in the same way?

What would you **change** next time?

What **relations** to key stakeholders (industry, ministry, governmental bodies, etc.) are so important that you need to strengthen them?

What would you **recommend** to other NMI?

What are **challenges** which are not yet resolved?

⇒ Write your main ideas on cards