

# ***SELF ASSESSMENT TOOL (SAT) PROPOSAL***

***PP8  
FORTH/STEP-C***

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# ***Why benchmarking for SMEs***

- ***Understand your current position comparing to competition***
  - *Self-assessment for strategic decision-making*
  - *Identify gaps and weaknesses*
  - *Recognise strengths and opportunities*
  - *Become familiar with best practices*

# ***Benchmarking reports***

## ***Areas of benchmarking***

### *Finalise indicators for*

- *Technological innovation*
- *Product/process innovation*
- *Management / Marketing*
- *Financing innovation*
- *Intellectual Property*
- *.....*

# ***Benchmarking reports***

***A. Use of questionnaire developed by  
the statistical offices for survey***

# ***Benchmarking reports***

## ***PART 1***

### ***General Information about the enterprise***

## ***PART 2***

### ***Assessment of innovation capacity***

*2.1. Did the company introduced new products/services/process/organizational/marketing innovation?*

*2.2. Did the company developed these innovations with or without the collaboration with others?*

*2.3. Were any of these innovations introduced into the market?*



## **PART 3**

### **Financial support for innovation activities**

- 3.1. *During the last 3 years did your company receive public financial support for innovation activities*
- 3.2. *During the last 3 years did your company receive financial support from private organizations for developing innovation activities*

## **PART 4**

### **Collaborations for innovation activities**

- 4.1. *Did the company collaborate with other organizations for developing innovation activities*
- 4.2. *How important is the following factors*

## **PART 5**

### **Factors hampering innovation activities**

- 5.1. *Which of the following factors hampering or preventing innovation activities*

## **PART 6**

### **Intellectual property rights**

# ***Contents of Benchmarking reports***

## ***1 . Company details***

- *Company Name*
- *Address, tel., e-mail, website etc*
- *Business Sector*
- ..
- ..

# *Contents of Benchmarking reports*

## *2. Assessment wheel*





# ***Contents of Benchmarking reports***

## ***3. Indicators***

*Benchmarking*

*National level*

*(Sectoral level)*

*Transnational level*

# ***Benchmarking reports***

## ***B . Preparation and use of a new questionnaire***

*Use of 3 categories of indicators*

- *Ex ante*
- *In medio*
- *Ex post*

# ***Indicators***

## ***A. EX ANTE INDICATORS***

### ***A.1. Intellectual Property Rights***

- Questions under this Indicator are aimed to evaluate the support that the company receives from public organisations, (e.g. ministries, funding agencies, regional development agencies dealing with innovation, etc.) in terms of IPR.

# *Indicators*

## **A. EX ANTE INDICATORS**

### ***A.2. Connecting with knowledge resources***

- The indicator is about possible connections of knowledge providers with companies to support business development and competitiveness as well as with the existence of a supportive framework.

# *Indicators*

## *A. EX ANTE INDICATORS*

### *A.3. Funding and financing*

- The indicator relates to available funding sources in the company's country / region, in relation with innovation support before the launch of the project.

# *Indicators*

## *B. IN MEDIO INDICATORS*

### *B.1. Innovation environment*

- This indicator is about the support (direct and/or indirect) that may come from public authorities, in the initial phase of the project idea (includes research/development phase, production, distribution channels, marketing, etc.) as well as the need for further development.

# *Indicators*

## ***B. IN MEDIO INDICATORS***

### ***B.2. Technology cooperation***

- The indicator covers the existing linkages between different types of innovation players from the company's country / region. It is important to assess the perception on this issue which includes research labs where prototypes / models developed by companies, should be tested, availability of research infrastructures, availability of skilled staff able to support the company in this phase, technology forecast, etc.

# *Indicators*

## ***B. IN MEDIO INDICATORS***

### ***B.3. Building Knowledge***

- This indicator targets the roots of innovation in respect to the education system. Furthermore, the availability of educational programs in terms of innovation related business development, support for innovative companies, entrepreneurship, attraction of talents etc. are sought.



# *Indicators*

## ***C. EX POST INDICATORS***

### ***C.1. Time to market***

- This indicator refers to the “real” introduction of the product / service to the market, the support available for having the product to be seen/promoted to clients, either from the market that the company has foreseen or to other markets. It is also important to assess if the existing environment provides the appropriate support for a real “transfer to the market” process.

# *Indicators*

## ***C. EX POST INDICATORS***

### ***C.2. Competing in the global market***

- Questions under this indicator are aimed to assess the support and advices that the company may receive from public authorities in relation to internationalisation of the business (in terms of the developed product).

# *Indicators*

## ***C. EX POST INDICATORS***

### ***C.3. Cluster community***

- A cluster is a group of several types of organisations (e.g. research organisations, companies, public authorities, etc.) that support each other in solving common problems while competition among them is not disturbed. The indicator assesses the availability and quality of support for clustering, both at national and regional level as well as euro-regional level.

# ***Contents of Benchmarking reports***

## ***1 . Company details***

- *Company Name*
- *Address, tel. E-mail, website etc*
- *Business Sector*
- ..
- ..

# *Contents of Benchmarking reports*

## *2. Assessment wheel*



# Contents of Benchmarking reports

## 3. Indicators

	Question	Indicator	Q	W	S	Q	W	S	Q	W	S	S	NS	TS
<b>EX ANTE</b>	1,2,3	<b>1 INTELLECTUAL PROPERTY RIGHTS</b>	1	1	4	2	2	2	3	2	3	14	45	55
	5,6,7	<b>2 CONNECTING KNOWLEDGE RESOURCES</b>	5	1	2	6	2	2	7	2	2	10	25	75
	9,10,11	<b>3 FUNDING &amp; FINANCING</b>	9	1	5	10	2	5	11	2	5	25	100	0
<b>IN MEDIO</b>	14,15,16	<b>4 INNOVATION ENVIRONMENT</b>	14	1	3	15	2	2	16	2	5	17	60	40
	18,19,20	<b>5 TECHNOLOGY CO-OPERATION</b>	18	1	4	19	2	5	20	2	2	18	65	35
	22,23,24	<b>6 BUILDING KNOWLEDGE</b>	22	1	1	23	2	2	24	2	2	9	20	80
<b>EX POST</b>	25,26,27	<b>7 TIME TO MARKET</b>	25	1		26	2		27	2	4	20	75	25
	31,32,33	<b>8 COMPETING TO GLOBAL MARKET</b>	31	1	4	32	2	2	33	2	3	14	45	55
	35,36,37	<b>9 CLUSTER COMMUNITY</b>	35	1	3	36	2	2	37	2	2	11	30	70
Q .. Question   W .. Weight   S .. Score   NS .. Normalized Score   TS .. Total Score														

# Contents of Benchmarking reports

## 3. Indicators

1. Ex-ante indicators	Your Score	Average Score
Intellectual Property Rights	55	52
Connecting knowledge resources	75	49
Funding and financing	0	42

2. In-medio indicators	Your Score	Average Score
Innovation environment	40	47
Technology co-operation	35	45
Building knowledge	80	46

3. Ex-post indicators	Your Score	Average Score
Time to market	25	41
Competing in global market	55	45
Cluster community	70	47

## ***ISSUES TO BE DISCUSSED***

### ***1. Type of questionnaire***

### ***2. Questionnaire***

What kind of information the company will provide

Size of the questionnaire

Focus

### ***3. Structure of the Report***

*What kind of information and results the company will receive  
(on line production of the report)*

### ***4. Assessment at national (and/or sectoral) level***

### ***5. Assessment at transnational level***