



Organization for Security and Co-operation in Europe
Secretariat

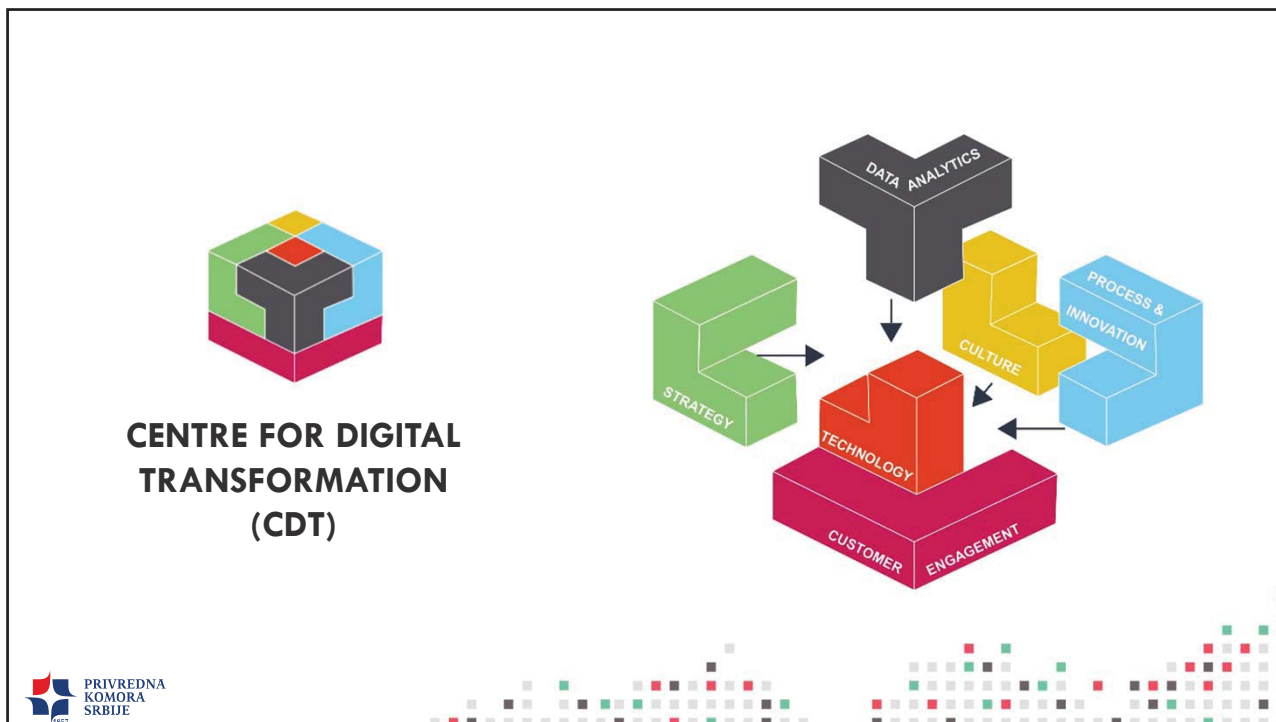
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Conference Services

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OUR VISION, MISSION AND OBJECTIVES

DIGITAL TRANSFORMATION OF SERBIAN ECONOMY IN ALL ASPECTS OF OPERATIONS

MISSION OF CENTRE FOR DIGITAL TRANSFORMATION (CDT)

CDT becomes the main driver for coordination and implementation of digital transformation in all private-sector industries, focusing in particular on small and medium-sized enterprises.

Signed Agreement with Governments Office for IT with clear role for CDT



OBJECTIVES OF CENTRE FOR DIGITAL TRANSFORMATION

COMPETITIVENESS

IMPROVE PRODUCTIVITY AND EFFICIENCY OF OPERATIONS OF THE ENTIRE SERBIAN ECONOMY THROUGH A STRATEGIC APPROACH TO THE DIGITAL TRANSFORMATION PROCESS

EDUCATION

FACILITATE DIGITAL TRANSFORMATION THROUGH EDUCATION AND ENGAGEMENT WITH BUSINESSES AND PROFESSIONAL COMMUNITY

INTERNATIONALISATION

INTERNATIONALISATION OF OPERATIONS AND READINESS TO JOIN SUPPLY CHAINS OF MULTINATIONALS (WITH SERBIA BECOMING MORE ATTRACTIVE AS AN INVESTMENT DESTINATION)

FINANCING

EASIER ACCESS TO FINANCE FOR THE DIGITAL TRANSFORMATION PROCESS

NETWORKING

STRENGTHENING LINKS BETWEEN THE SME SECTOR AND DOMESTIC HIGH TECHNOLOGY COMPANIES AND RESEARCH AND DEVELOPMENT INSTITUTIONS



WHAT HAS BEEN ACHIEVED SO FAR?

01

INITIAL CONCEPT, FORMING OF A CORE TEAM AND CREATION OF A LEGAL ENTITY FOR CDT. INITIAL INVESTMENT OF ~60K PROVIDED BY GIZ

02

VISITS TO AUSTRIAN, GERMAN AND ESTONIAN DIGITALISATION CENTRES AND DEVELOPING COOPERATION

03

CURRENT STATE ASSESSMENT STUDY FOR DIGITALISATION CONDUCTED IN 3 INDUSTRIES IN SERBIA IN COLLABORATION WITH GIZ

04

FINALISATION OF SERVICE PORTFOLIO, SERVICE PROVISION PROCESS, SME EDUCATION AND CERTIFICATION OF EXPERTS.

05

FINAL STRATEGY AND FUNDING ARRANGEMENTS FOR CDT AND SUBSIDIES FOR SERBIAN ECONOMY TO IMPLEMENT DIGITAL TRANSFORMATION PROJECTS



SURVEY OF DIGITALISATION IN SERBIA: METHODOLOGY

FIELD WORK:



TO



METHODOLOGY & SAMPLE:

Type of a survey:

B2B → Business to business survey

Data collecting method:

F2F CAPI → Face 2 face computer assisted personal interview

Sample size:

N=342 companies

Sample type:

Quota sample:

1/3 of sample is from one of three industries: Metal Industry (N=123), Agriculture (N=113), Services (N=104)

RELEVANCE:

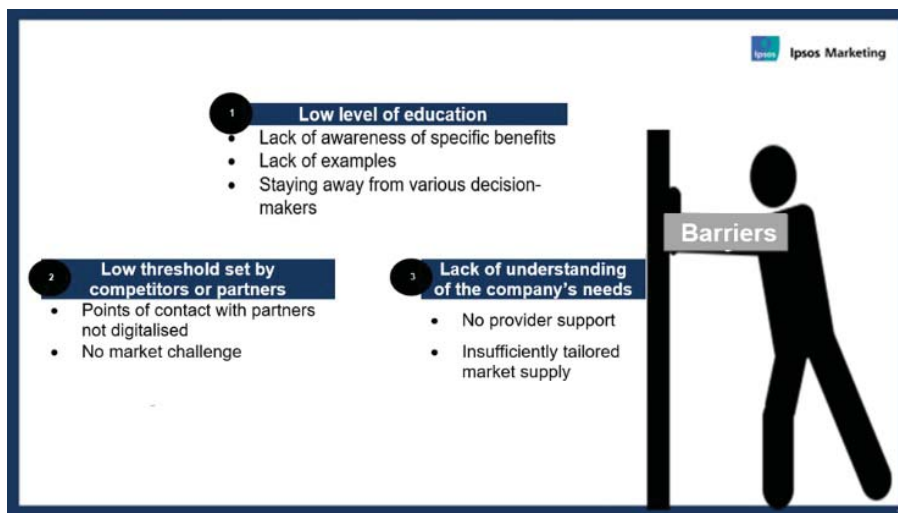
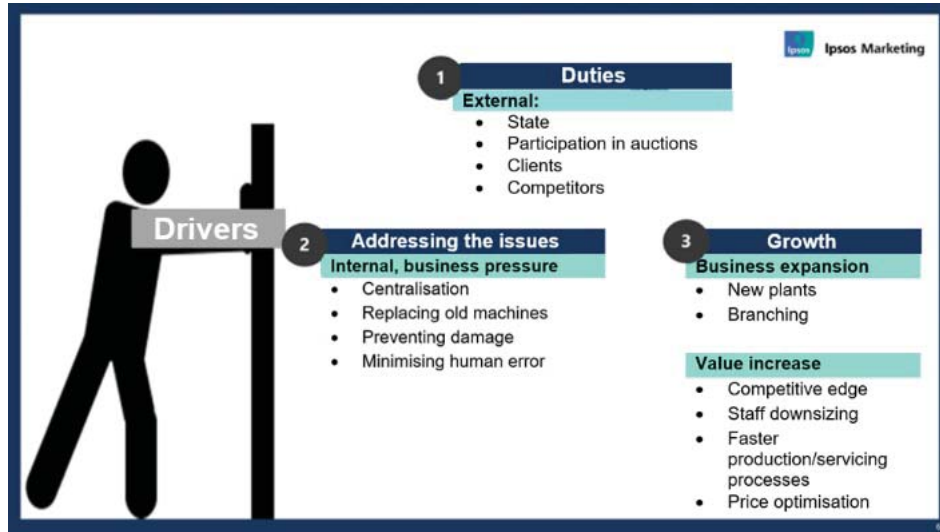
MORE THAN IN OTHER INDUSTRIES

- MI Metal industry
- A Agriculture
- S Services

LESS THAN IN OTHER INDUSTRIES

- MI Metal industry
- A Agriculture
- S Services







MAIN PROBLEM

MORE THAN 60% OF COMPANIES HAVE NO DIGITAL TRANSFORMATION PROJECTS IN THE PIPELINE. OF THE 40% THAT DO, 90% HAVE PLANNED PROJECTS TO PURCHASE BASIC SOFTWARE OR DEVELOP WEBSITES.

SURVEY OF DIGITALISATION IN SERBIA: CURRENT STATE REVIEW

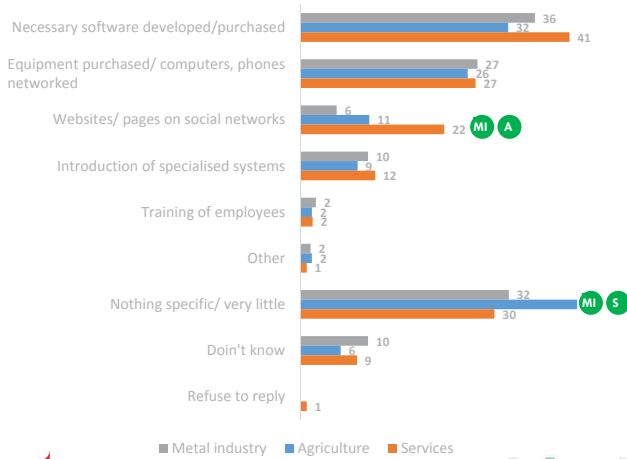
Understanding the current situation

- About one half of enterprises do not have an IT department, while **less than 30%** of employees use computers, mobile phones etc. in their everyday business activities
- About **one third of enterprises** have made no efforts do digitalise business processes and more than one half of them have no plans for future digitalisation projects
- Digitalisation, both in terms of implementation and in terms of project planning, involves **one of two things**: purchase of specialised software & systems or purchase of equipment
- When implementing and planning of digitalisation projects, enterprises rely mainly on their own funds for finance and **avoid** negotiating bank loans
- In any case, talking about earned and invested money is still a taboo for Serbian businessmen – which is why our insights into investment in digitalisation are limited. The data seem to indicate amounts are rather modest, **only up to 5% of last year's turnover (2017)**

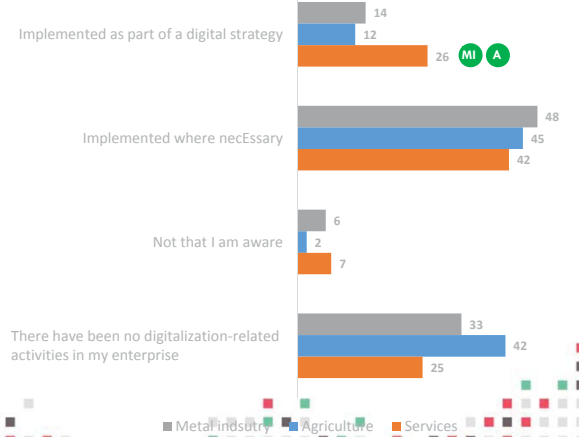
SURVEY OF DIGITALISATION IN SERBIA: CURRENT STATE REVIEW

Digitalisation has generally been implemented without an underlying strategy and elaborated strategies and has involved purchase of specialised software & systems and purchase of equipment. Agricultural enterprises have done the least to digitalise their operations.

COMPLETED PROJECTS

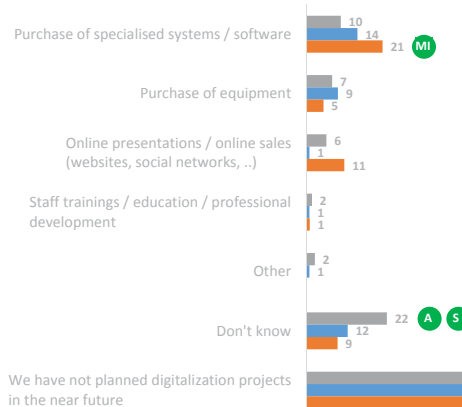


NATURE OF DIGITALISATION PROJECTS



SURVEY OF DIGITALISATION IN SERBIA: REVIEW OF FUTURE PLANS

Future plans for digitalisation are rather limited in scope and involve mainly purchase of specialised software/systems and equipment, while more than half of enterprises have no plans at all.



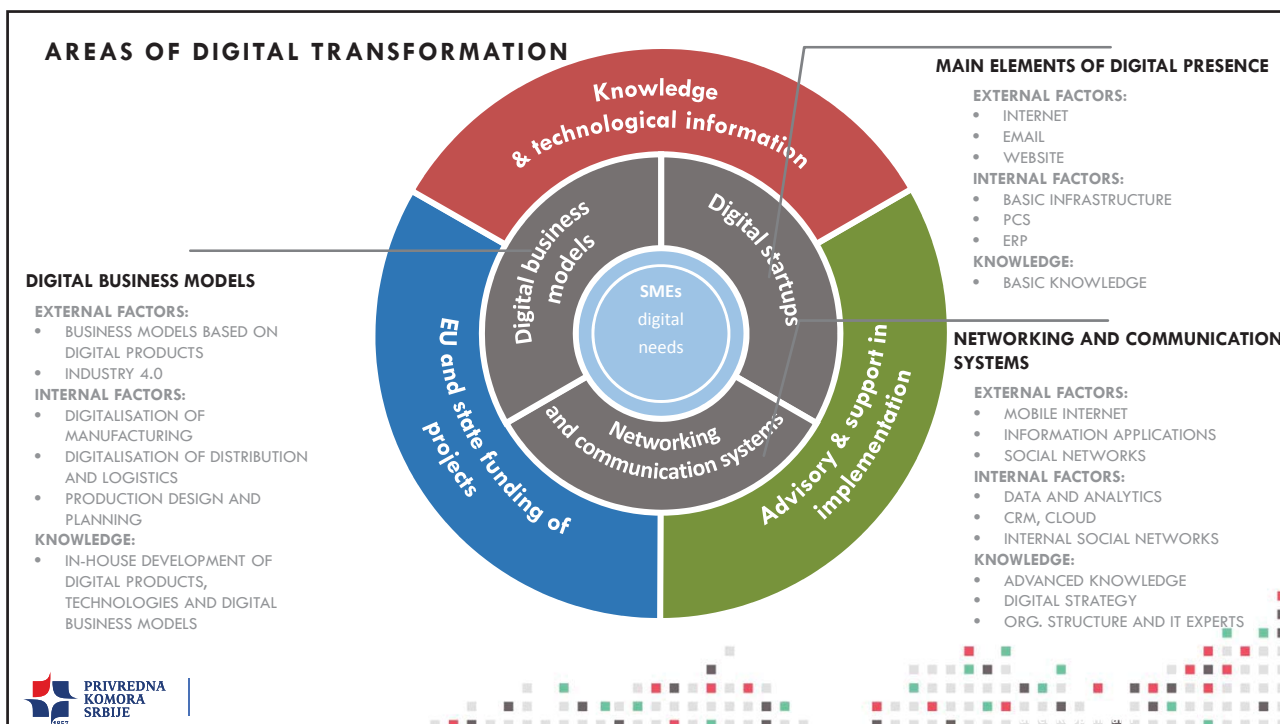
SURVEY OF DIGITALISATION IN SERBIA: REVIEW OF FUTURE PLANS

Primary functions in future steps: EDUCATIONAL, ADVISORY AND FINANCIAL

- **Thoroughly understand business processes and identify scope for implementing digitalization** – service providers themselves as well as enterprises must become aware where and how digital products can be used
- **Showcase specific benefits of implementation of digital products, not only in general terms, but also in each specific aspect of operations** (as there are clear differences in digitalization levels between different areas, as well as differences regarding plans for future implementation)
 - Focus on savings which digitalization can bring, primarily in terms of money, but also in terms of time, as a way of engendering interest. Also, map potential areas of growth.
- **Develop tailored approaches for each industry** – although there are common views and approaches, demands and issues vary
- **Agriculture faces the most severe lack of financial support (in terms of awareness of and access to funding)**

SOLUTION

DESIGN A SERVICE AND PRODUCT PORTFOLIO TO BOOST THE DIGITAL TRANSFORMATION OF SERBIAN ECONOMY.



- ## ADVISORY & SUPPORT TO IMPLEMENTATION
1. Checks and initial analyses free of charge

2. Paid analyses and development of strategies
- **Online check of the current digitalization level**
 - Online questionnaire posted on the CDT official website. The questionnaire has been prepared on the basis of the WKO model.
 - Service free of charge
 - **Initial workshop**
 - A standardized one-day workshop with a trained consultant for a detailed determining of the existing level of digitalization of a company and its business processes, as well as defining of a digital road map with a proposed set of solutions.
 - Service free of charge. The consultant's service is included in the subsidies to the economy and is as such 100% covered by the budget allocated for these activities.
- PRIVREDNA KOMORA SRBIJE**

ADVISORY & SUPPORT TO IMPLEMENTATION

1. Checks and initial analyses provided free of charge
2. Paid analyses, development of strategies and additional trainings

- **Detailed workshops for the development of solutions proposed in the digital road map (step 2)**
 - Consultants will spend several days at the company to define in detail horizontal and vertical business processes and proposed solutions and work out their implementation in detail.
 - Service subsidized up to 50%. Maximum 1,000 euros per SME
- **Implementation**
 - Implementation of digital tools through a partner network of solution providers
 - Subsidized service
- **Additional trainings**
 - Daily, weekly and monthly trainings tailored to entrepreneur's needs
 - Service subsidized up to 50%. Maximum 1,000 euros per SME



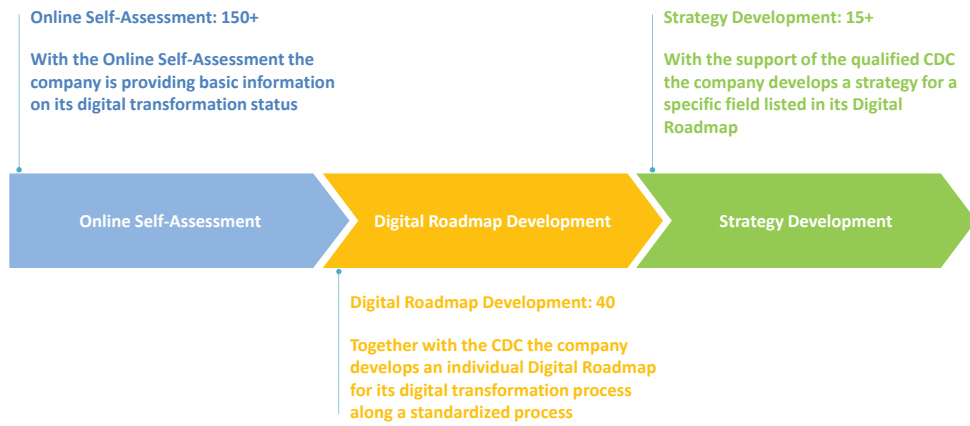
KNOWLEDGE AND TECHNOLOGICAL INFORMATION THROUGH DIGITAL ACADEMY 2018 - 2019

1. Webinars/Online Videos – online via the DTC Platform
2. Workshops/Conference – regional centers

- **Digital competences which will be available from the digital academy for SMEs:**
 - Digitalization of a specific industry (Metal Industry, Agriculture, Services, Automatization Technology etc.)
 - Digitalization of operations (e-commerce, online marketing, process management, business model development etc.)
 - Digitalization for creative media and communications (new media, website and application development etc.)
 - Information technologies (IT security, data protection, GDPR, etc.)
- **Other content which will be made available to the SMEs sector:**
 - Newsletters
 - Guides to digital transformation
 - etc.



Pilot Project 2018: Enterprise Consulting



SIMPLIFIED SME SUPPORT PROCESS



Future Regional Plans

- **EUROCHAMBER** should create and establish a platform that will provide guidance and training on how to build digital transformation centers to its 45 members and a European network of 1700 regional and local chambers that represent over 20 million businesses in Europe
- **Chamber Investment Forum – WB6**
 - Project in pipelines for the next year
 - WB6 CIF as a strong collocutor for a business-friendly digital integration of the region
 - WB6 CIF services for companies concerning EU regulative framework in the field of digitalization



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