**Smart Survey Implementation (SSI) Conference 3 and 4 April 2025, Heerlen, The Netherlands**

**Opening 3 April 2025**

*Welcome*

The SSI conference was opened by Joost Huurman, Deputy Director-General at Statistics Netherlands.

Joost welcomes all participants and emphasizes the importance of innovation and the collaboration between academia, NSIs and in this project even a commercial partner.

Research and innovation are needed not only for new resources, methods but is also important to maintain and enrich the quality of (some) statistics.

Research and innovation on using smart features is complex, difficult and expensive. It is also very hard to determine what the added value is for an NSIs or statistics in general but we are getting more towards that point.

About the last ten years Statistics Netherlands invested much and continues to do so in future to get more clarity within this field.

Joost wishes everyone a pleasant and fruitful conference.

*Agenda and goals of this workshop*

Remco also welcomes all participants (45) and gives a summary of the agenda and the expectations of this conference.

**Perception survey**

***Results perception survey presentation by Janelle***

The main question is:

How does the general population think about smart features?

The survey was done to find out if respondents are willingly to adept smart features, find clues for strategies and get background information for legal and ethical matters.

The perception survey was held in three countries, Italy, Slovenia and The Netherlands in a two-step survey.

First a paper questionnaire on digital skills, willingness towards smart data collection and second followed by an online ‘smart’ survey including four smart tasks; share location, share step count, share receipt and share meter reading of water, electricity and gas.

*Conclusions and next steps*

*Conclusions (not limited)*

* While participation in the general survey varied across the three countries, the participation rate in the smart survey was very similar, namely around 20%.
* Both hypothetical and actual willingness vary across the countries and are not always consistent (Note that survey was experimental by nature and surveys design not fully comparable).
* Willingness to do smart tasks depends on the context and logic of the request.
* Strongest hesitations come from concerns about data security and (consequently) privacy.

*Next steps*

Next to review and revise interview tactics, recruitment materials and in-survey help options also inform legal officers.

*Q and A*

*Question*

What is the definition of the participation rate?

*Answer*

It is about the response rate of the willingness between the hypothetical tasks in the paper questionnaire versus the smart questionnaire.

*Question*

Could this apply that we have to choose our battles as there is more reluctancy in different NSIs?

*Answer*

It is not really choosing your battles, the characteristics are quite similar but there is some bias in the results, a group willing versus not willing to go smart. We have to alter our tactics in how to convince them to go smart, to understand why respondents not going smart and there also the aspect of privacy.

**SSI overall findings per WP**

***Methodology results WP2 by Peter, Theun, Florian, Claudia and Danielle***

Various presentations on the overall results including the field tests and usability tests so far.

There are four subtasks within this work package:

* How do we recruit respondents successfully for smart surveys?
* How should we use Machine Learning to use smart data successfully?
* Issues of User Experience & User Interaction. How do we let respondents interact with smart data?
* How do we combine data from smart surveys with traditional data (web or paper dairies)?

To get answers to these questions small- and large scale tests are done in different countries, smart data collected is reviewed and models are (re)trained.

*Subtask 1: How do we recruit respondents successfully for smart surveys?*

Recruitment experiments were carried out in Belgium, Germany and Norway as part of large field tests with smart surveys on HBS (Germany, Norway) and TUS (Belgium). In Belgium and Germany the MOTUS app was used and Norway used their own smart app.

Because of the different studies in different countries the results were sometimes hard to compare.

*Conclusions (not limited)*

* Huge differences between countries.
* Hesitation at respondents to go smart, different perception, privacy.
* There is a more positive effect when interviewers are used.
* Influence of bias.

*Subtask 2: How should we use Machine Learning to use smart data successfully?*

The use of Machine Learning (ML) and algorithm for smart data processing is a time consuming activity. Next to methodological research the acquisition of (smart) training data and testing takes a lot of effort. The importance of training and testing must not be underestimated.

In this project a pipeline is developed from input of smart data, process using ML models or unsupervised algorithms leading to output tentative or committed data (simplified).

*Conclusions (not limited)*

* Models can be improved when you train and test them more.
* The quality of the input data is important.
* There is a need for country specific models.

*Subtask 3: Issues of User Experience & User Interaction. How do we let respondents interact with smart data?*

Studies on usability tests in different countries (Belgium, Germany, Norway, France , Italy and The Netherlands) concerning Receipt Scanning microservice and the Geo-service microservice are done with the use of the MOTUS platform or with the developed apps at the NSI.

Respondents got a think aloud test, a harmonised task list/sample (receipt scanning), a TUS/mobility survey, a harmonised post-use interview/sample.

In principle respondents are used to smart features when you think about banking, using apps for taking a picture to upload your license for instance. So they also have expectations about a smart feature like a fast processing time, accuracy, easy to use, not too many notifications, it must be supportive not controlling (privacy).

*Conclusions (not limited)*

* Take notice of what respondents expect or not expect.
* Train the microservice.
* Communicate with the respondents.
* Offer alternatives for paper receipts.
* Add and train classification algorithms.
* Smart microservices also needs to be clever.
* Smart microservices lower respondent burden but not the complexity of survey.

*Subtask 4: How do we combine data from smart surveys with traditional data (web or paper diaries)?*

Looking at the TUS survey in different modes, by paper or by web tells us that the differences are large. Also a distinction is made in age, education and employment.

*Conclusions (not limited)*

* There are significant differences in overall response rates across key variables.
* There are significant differences in mode-specific response rates.
* There are no-significant differences in mode-specific response rate across key variables.
* The differences are likely a combination of causes.

*Q and A*

*Question*

Might stressing the effort be positive?

*Answer*

Probably but it is not the data collection but about the people (respondents) who need to deliver.

*Question*

Looking at the response rate, can the browser be of influence to increase this?

*Answer*

Different participants answered that the response rate will increase with the use of interviewers and also with the onboarding.

***IT/services results WP3 by Joeri***

The goal in this project is the development and integration of microservices for smart end-to-end surveys.

There are four tasks; General Microservice Architecture, Integration Microservice(s), Specific solution 1: HBS and Specific solution 2: TUS.

For the 3 developments, receipt scanning, geo-service and energy service the architecture is reusable and shareable.

The road to production is paved with many challenges, innovation and different roles, as there are:

* Citizens: role as active contributors and stakeholders.
* Institutions: role as data collectors, funders and stakeholders.
* End-to-end solutions: integration of online methods and modes + smart data collection solutions (design – collect - smart data).
* Trustworthiness: guaranteeing strong privacy and security safeguards.

It is inevitable that research and taking the development to production are also important. Together with legal and ethics this is the supply chain to success of using smart features in surveys.

Therefore every code developed is free of use, open source and available on Github.

The microservice architecture and the integration to (any) data collection platform(s) is visualised in the presentation (sheet 8).

There is an independency towards microservices and platforms itself, information that is being processed in a microservice does not interrupt another. In the architecture is a complete end-to-end solution.

There are four deployment strategies, production domain, namespace, containers and native platforms. At production domain and namespace overall control management, updates and support lies more at hbits, for containers and native platforms this is more external at the client. The client has their own control over privacy and security and less support.

***Business process building blocks WP4 by Marc***

The aim is to provide guidelines that will help NSIs to extend their business process to adopt smart solutions in their surveys. NSIs can than model their business process and identify the capabilities and roles needed.

The description of the process building blocks is a kind of library with business activities which are relevant for smart surveys. These can be divided in different phases such as specify needs, design, build, process. A (sub)process can exist of more process activities, we described 63.

The scope of the library consists two types of process activities; a. new or non-existing for non-smart surveys (e.g. develop app) and b. not specific as such for a smart survey (e.g. train helpdesk employees). Further there are different types of smart solution, those which are not specific so activities that are general usable/applicable and those which are specific in this project HBS, TUS and Energy usage meters.

There are examples of processes which gives NSIs an idea how to use building blocks.

This description is not the best practice and the structure of the building blocks process is not a prescriptive process. It can help NSIs a lot in a supportive way. NSIs has their own needs and should therefore develop its own process.

***Legal framework WP5 by Lino***

The work package started with reading the DPIAs (Data Protection Impact Assessment) from different countries of which just a few are related to smart survey.

We take into account some needs and constraints:

* DPIA for smart surveys should be considered mandatory.
* Regulation and guidelines to be followed.
* A relatively new field for several NSIs.
* Involves different actors and different professions.

How to handle with DPIA when you want to go smart in your surveys?

You have to know which key elements needs to be analysed and then propose a modular strategy to extract the ethical legal issues related to the use of smart features.

A decision tree is developed which can support NSIs in this, you can see this as a building block for DPIA. Together with interviews, guidelines and documentation it should be possible to set up a DPIA in cooperation with your legal department.

It is also useful to check whether existing DPIAs should be revised.

*Conclusions and next steps*

* A modular strategy has been elaborated based on the smart features classification, user tests, pilots and field tests and discussions.
* To test the modular strategy, we applied it to HBS, TUS and Energy data donation.
* It is time to use the modular strategy, checking strengths and weaknesses in the field, populating the different sub-modules and analyses and to share them.

*Q and A*

*Question*

Is there a public DPIA document available?

*Answer*

Not as such, there is no generic DPIA but you can use the model, analyse and consider how to convert the DPIA.

*Question*

Are there alternative solutions for OCR, smaller building blocks perhaps?

*Answer*

As far as known there are no alternatives.

*Questions*

What does that mean “follow the data”?

*Answer*

It is a method to discover, in the flow of personal data during statistical process, where data are stored, who are the actors involved, where risks concerning personal data may arise. So, it is a useful method in your analyses for setting out a DPIA to mitigate risks .

*Question*

A lot of data is collected by others (e.g. Google) when you use a smart phone. Do you consider them as a joint actor?

*Answer*

In general it is the problem of the user of the smart phone. When third parties are involved in the survey’s process, this can be a problem unless you have a contract with them. To discover these situations it would be useful consider the concept of “follow the data”.

*Question*

How does this all relate to trust?

*Answer*

Usually respondents find NSIs trustworthy but as NSI you have also an accountability to be so. Janelle adds that in the perception survey a question about trust was included and information about the results will be in the deliverable.

**Receipt scanning service and HBS**

***Specific presentations on HBS by Joeri and others***

The configuration on the MOTUS application and the development of the HBS app is presented and how it works when receipts are scanned.

In principle you can develop whatever you want but you need tot train it, not once but many, many times for improvement.

You have to create good training data which can be done by collecting tickets and digitalize them also different experts are needed for instance COICOP experts.

The OCR microservice is integrated, it starts with some general information than the respondent can choose between receipt scanning or add manual information (instructions are based on the usability test) and at the end the respondent checks OCR and document for understanding the results.

*Usability testing Receipt Scanning (small sample) by Theun*

When we look at the different context the results are:

* Complex diary studies; respondents understand the purpose and responsibility. There is no history or perspective.
* Microservice linked to UI/UX; no one size fits all but there are general points of attention.
* Smart solution; respondents expect smart solutions but the expectations are higher than we think.
* Clever solution; yes and no, tentative versus committed. Not clear (yet).
* Trustworthy solution; positive if the purpose is clear and also if the institute is trustful.

***Workshop on HBS***

The participants are divided in groups and give answer(s) to the assigned question.

*Can you design the HBS process using the process building blocks?*

From a business perspective it was a good discussion and for NSIs it is recommended to do this yourself by using the process building blocks. It can also be used as a checklist and when you encounter issues, difficulties take a decision.

The group designed a process as example:

* Download the app.
* Ask for consent (when?)
* Upload ticket.
* Active learning, make use of the respondent; available products in the store but not in the model and use these products as input for updating the model.
* OCR in-house or at a third party?
* Feedback classification (COICOP) back to the respondent?

*Legal: apply the legal framework to HBS?*

The perspective is to look at the data, what we do with it and how we want to protect it, in other words “follow the data”.

Simplified there is an app and receipts are scanned so the data is in the app but probably also on the phone to be used in the app (in the gallery).

In the journey data is taken from the phone, this can be different versions of the data (tentative, aggregated) and also stored in different cases/boxes. You must be aware that if there is a breach what the impact might be, low or high?

Looking at the actors in the end-to-end process, the respondent (data subject), the data collectors (data controller and the statisticians (data processors), you must ask yourself which security (legal, ethical) must be taken when they come across.

*When is our smart HBS also clever?*

Smart features from NSIs/universities will become common features but are they clever enough for respondents. Therefore we need to understand the respondent, what the respondent has to know and able to and is willingly to do what we ask through the app.

Smart features needs to be fast otherwise respondents will drop out, the performance (technical) is also important, less or even better no errors.

We have to manage the expectations, communication towards respondents is very important perhaps the availability of in-app communication and the possibility to give feedback through the app (e.g. text messages).

*Role of HBS training data?*

Is there the possibility to generalize because every country annotates, OCR is tested. Maybe we can generalize in the future with the use of LLM (Long Language Models). A lot of tickets/receipts are not yet defined. Looking at supermarkets, scanned ticket must first be recognized as a ticket from the supermarket.

There is need of COICOP classification for country specific data.

Retraining with data will detect changes in receipts and repetitive errors. You have to know what is on the receipts and link them to COICOP.

How do we retrain? There is product change and receipts lay out can change.

Training data is important to improve models, classification, decrease errors, etc.

*How do we better recruit for smart surveys?*

Of course each country is different and the impact of issues such as privacy, motivation, digital or technical differs also.

There are many reasons why respondents drop out or not even begin with the survey. You must think of privacy reasons, distrust in using an app, not a mature app, poorly rated app, country/NSI specific limits, to burdensome, the respondent does not see the benefits of participating etc.

Possible solution suggested are (not limited:

* Make concessions.
* Ask less.
* Make use of interviewers (explanations, trust, help).
* Feedback in the app.
* Incentives.
* Short and transparent invitation letter.
* Less complex.

**Geo-service and TUS**

***Specific presentations on TUS by Joeri and others***

The Geo-service on TUS is shown how it looks like in the app. In different you can see the information about the time-line, measured data, detailed view, adding context and map visualisation.

All the geo activity is being recorded and there is the possibility to make changes, add information, save geo-points.

You can also see the recorded information back. The source data keeps completely in tact. If the connection for example was lost, you can add a time block manually.

For the first model to define stops and tracks and to define the mode of transport a decision tree was made and a sample code and test data sets were used to predict the mode of transport with an algorithm.

The results of a CBS test set (non-domain) shows that the performance varies widely across classes. For car, bike, walking and train the performance is good but for bus, metro, tram and other the performance is poor.

The results of a open geo-data test set (non-domain) shows that the performance for walking and train are relatively good, for bike the performance is moderate and for the rest bus, tram, metro this is poor. The balanced accuracy is less at the geo-data in comparison with the CBS test set (32% versus 46%).

The HETUS classification pipeline (domain) uses points of interests (POI) to predict the activity done by the respondent with an algorithm. The POI are points, at stops, on the map with information such as a bank, shop or theatre.

When we look at Google places and open street maps (OSM) we can conclude that:

* The algorithm works well when the auxiliary information is available.
* If there are no POI’s, the prediction is not obtainable.
* The prediction improves when more than one activity is selected.
* OSM is a lower quality auxiliary source then Google places as it contains fewer POI’s and this affects the activity prediction.

*Usability testing Geolocation by Theun*

When we look at the different context the results are:

* Difference between microservices; not single task-oriented, versatile microservice.
* Microservice linked to UI/UX; no one size fits all but there are general points of attention. Some respondents it was confusing to use it as they did not know in which diary the were.
* Smart solution; if you only register your movement (mobility) this works well but it is limited for TUS. For home specific activities or more activities on the same location it is not very useful.
* Clever solution; there is not much consensus about this. It is in the details.
* Trustworthy solution; for supportive reasons respondents find it trustful but for controlling respondents are more negative for example switch of at home.

***Workshop on TUS***

The participants are divided in groups and give answers to the assigned question.

*Can you design the TUS process using the process building blocks?*

For this workshop Henna came up with a use case from Statistics Finland and some building blocks from work package 4 were used to form a work flow and this worked well.

Activities in the process noted were for example; edit geolocations, integrate data, train helpdesk employees, edit classification by respondent.

The workflow formed was: deploy the microservice -> collect geolocation points -> derive motions and stops -> edit motion and stops -> classify automatically/manually.

*Legal: apply the legal framework to TUS?*

There is friction if we try to compare HBS with TUS. TUS is more domain specific and there is continuous and much richer data than what we (NSI) need.

A legal basis is important and also who is accountable, the respondent or the NSI. The respondent can choose between different apps that are available.

For NSIs communications towards respondents is important.

*When is our smart TUS also clever?*

The discussion in the group was very interesting and focussed on four questions items, when, when not, how and why?

When to use smart TUS, when traveling, shopping at HBS, recording activities and not when activities or location are sensitive, perceived third party risk.

On the how (what) question you can think of a toggle switch, continuous interaction, communication and for why it can be supportive of diary, the versatility.

*Role of TUS training data?*

Impressions and experiences were shared. Input should be tailored to be used (better detailed) so that travel prediction is better. The quality of sensors across countries can be different.

Respondents use different smart phones, like iPhones and Android.

A data set should be available as a benchmark with high quality of the travel mode even specific travel modes.

*What do we when algorithms fails?*

If the threshold to algorithm is not fulfilled what do we communicate to the respondent and how to deal with it? There are two options where the burden lies, at the NSI or at the respondent?

Concerning the NSI do we have alternatives like fall back to another mode, is the data received enough to make use of it, do we have classification in house.

Concerning the respondent try to keep them in the survey, make use of a sub-sample, more incentives, communicate that there was something going wrong (manage the expectations).

**Second day 4 April 2025**

**Energy service**

***Energy service and usability test by Jeldrik***

The context of the research is to learn how to build, test and evaluate a smart energy survey while considering methodology, IT, logistics and legal aspects. The motivation to do this is the declining of response rates, the burdensome of the traditional surveys and requirements and desires for information increases.

The respondents (13) for the usability test started with a questionnaire, collected data and filled in a evaluation questionnaire in the end. The data was collected for 8 days with a dongle installed in the smart electricity meter.

In this way we did not have to develop ourselves, the dongle and app were available. Further comparison of behavior was measured and we got information about data quality, assess feasibility and use experience.

*Results*

The installation was very easy except for one person, there were no technical issues, only one person needed an extra USB-C cable.

One person found the test burdensome, on the other hand almost all participants became more aware of their usage and 3 adjusted their behaviour.

Instead of 15-minute data one participant provided daily data instead.

Half of the participants raised concerns about privacy.

*Lessons learned*

Positive is that once installed passive collection is feasible and the burden is low. Further the real-time insight is valuable to participants.

But we must take into account that this was a very small pilot, the 15 minute data was not detailed enough to identify devices automatically so diaries are still needed for the context.

Help might be needed for both installation and sending data back.

*Future outlook*

Some ideas are:

* Develop secure microservice for data retrieval.
* Consider energy panel for gas, electricity and water.
* The need of better onboarding strategy.
* Devices as incentive, but think about the costs.

*Q and A*

*Question*

You got feedback about changing behaviour from 3 participants, do you think this will increase?

*Answer*

Participants that started with the pilot are more aware in the beginning but if they participate for a longer period they might fall back in their old behaviour.

*Question*

What about the privacy at a single household? What someone is doing or leaving the house or is on holiday can be detected.

*Answer*

Agreed, we can say something about (some part of your) behaviour so we have to explain, communicate that we are not interested in what people are doing.

*Question*

What are the costs of the dongle equipment?

*Answer*

About 25 euro’s, which is a cheap option.

*Question*

How about the landscape of smart meters in Europe?

*Answer*

Concerning smart meters for energy The Netherlands are far ahead, for smart water meters we just started.

*Question*

Were there any technical complications, e.g. first or second floor?

*Answer*

There was one drop out because this person lives in an apartment and the energy meter was for the whole block.

*Question*

What about the influence of a solar panels?

*Answer*

That is a big problem, in real time you can not see how much energy is going in and out. You have to estimate, storing energy during the day might help.

*Question*

If the time slot of 15 minutes is not enough to detect devices, why don’t we try ways to get more detailed information?

*Answer*

That depends who is asking (e.g. Ministry) that is not up to us as NSI. On the other hand the more you have can be better but the amounts of data are so huge that the internet probably cannot handle it.

**Governance and maturity**

*Maturity model by Marc*

The maturity model is developed for NSIs to give insight how mature they are and how to become more mature. Before using a smart feature, NSIs must be mature enough, if not failure is not unlikely.

We used existing models as an inspiration to come to a model focussed on smart surveys.

The framework of the model consists of 5 focus areas namely; organization, methodology, business process, IT and legal. For each of these areas there different levels of maturity; awareness (e.g. ideas), pilot (e.g. first trials), production (e.g. implementation), managed (in control), optimized (continuous improvement). It is obvious that levels are getting more mature from awareness to optimized.

The maturity model can be used as an assessment for the NSI as a whole or for specific surveys like HBS. The best outcome is if there is no imbalance, that all areas are on the same level.

In this project we will provide a manual how to use the model for doing the assessment in your organization.

*From research to production by Jerome*

To call a hold on declining participation rates and increase data quality Eurostat and NSIs decided to develop and implement new data collection modes.

It started about 7 years ago in Germany with the question “Can it work?”.

It was and still is not an easy task to do, the research and so called preparation phase of developing “an App” took 3 years. When we were convinced that it can work, the next phase started with the question “Will it work?” which took almost another year. Now, within this project we reached the stages of “working” and the next aim is the implementation of going smart with the HBS survey in 2026.

Foundational work had to be done, choices to be made, issues to be taken into account:

* Basics or called so; legal, data privacy and data security aspects, IT-infrastructure and server performance.
* Functional adaptions; transforming a third-party app to meet specific national demands.
* Mode strategy; online only, or online first or free choice?
* Measurement equivalence.

Survey managers have to learn a new role, more service oriented to the subject-matter and efficient service platforms are designed.

During this (long) process it is very important to test, train, evaluate, analyse, rethink, retrain etc. over and over again in order to do more, no what the issues are, how to solve them and to understand not only how the developed tool, methods or platform works from end-to-end but also what to expect from the respondents and how they might react.

*Lessons learned*

Many lessons are learned concerning costs which, hopefully in the long run will not only effect the new way of working but are more efficient as well. But on the short term investments are huge.

Lessons learned related to IT, project management, methodology, service attitude, quality control and change management are for example (not limited):

* IT personnel interested not only in IT but also in statistics and methodologist also in IT.
* Involved staff, shared vision, accept certain risk levels.
* Take a deep dive into online survey methods.
* NSIs must take on a service mentality.
* Automation and trust.
* Do not neglect change management.

*Future*

In the future Destatis will strive to further development towards digitalising and share practices with others with the aim to develop tools which make the burdensome for respondents easier and increase efficiency of the production process.

*Question*

Resources like money and human capital are critical and how was the organization coping with this?

*Answer*

These resources are important but it is more important that there is also backing from management.

*Question*

Did you find any persistence in your organization?

*Answer*

Yes, a lot. The question was will it work and we had our own technical process and forgot to take others with us and we have to regain their trust. We did this by talking to people, holding work shops, showing changes. This took us two years.

*Governance scenarios by Remco and Menno*

An exploration on Smart Survey Infrastructure governance models for the future.

Components that are in scope are, the app (front-end), collection platform, services (back-end), methods and knowledge.

We got input from other NSIs, added some more (literature) information and combined it and we came up with four scenarios:

* NSI completely supports itself: full control, on-premise hosting, minimal central governance.
* Joint component building: code sharing, best effort support, flexible collaboration.
* Joint service building: individual platform decisions, shared service development, coordinated integration, formalized agreements.
* Central smart solution: joint end-to-end solution, platform utilization, clear division of responsibilities.

The approach with a consortium has some benefits like shared expertise and experiences and lower operational costs but also challenges like complexity of roles and responsibilities, legal, privacy and IPR issues.

The recommended way forward is to invest continually, have the support of Eurostat, have a clear governance framework which will lead to a consortium for central smart solution.

*Thoughts about the future by Jean-Marc and Eniel (Eurostat)*

A decade ago were the first thoughts of the future which resulted in Trusted Smart Survey (TSS). Think about development of the first concepts of smart surveys, shared infrastructure, internet of things (IoT), new data sources like MNO.

Innovation was first more focussed on architecture that could be shareable, reusable to where we are now a combination of two approaches both architecture and business and going a step further with proof of concepts with end-to-end solutions for complex smart surveys (e.g. HBS) together with smart devices and respondents and take into account their privacy (DPIA).

Success factors are the cooperation between NSIs, Universities and a private company, a win-win combination with a multi facet approach, mature technology, user centricity.

But there are also challenges significant investments are done and being done but these are not completely mature yet. We probably save money in the end but still funding is needed.

Smart surveys are not the sole solution, it is a shift in burden for respondents and has impact on NSIs both operational and organisational.

The way forward … there is no future plan yet in the programme at Eurostat so we need to be creative with the lack of subsidies. Promote the success stories, communicate on different levels, share with other NSIs not only the forward stepping ones but also the others, focus on key use cases and create cooperation structures in order to keep the innovation running.

***Workshop on governance and maturity***

The participants are divided in groups and give answer(s) to the assigned question.

*Generic approach to smart surveys?*

Keep working together towards a promising and new smart survey, share information and share results and discuss opportunities and challenges.

Combine HBS and TUS, do not ask more but smarter, more clever and deal loosely with the privacy issue.

*Community after the project?*

Why?

Because collaboration makes friends/organisations better, you can share experiences and develop on European level.

How?

We need more formalization and structured governed for which we look at Eurostat to take the lead. We need also be targeted and the involvement of universities and commercial partners.

What?

Share knowledge (e.g. methodological, IT), develop new use cases, access to (new) data sources, alternative funding are some of the issues to think about.

*Governance?*

Group members scored the criteria which they find important/relevant comparing the different governance scenario’s. The criteria that scored 3 and more are:

* Managing smart solution.
* Legal and privacy aspects.
* Roles and responsibilities.
* Initial costs.
* Operational costs.

Further there is a big shift in thinking at NSIs as they are working together as partners in this project and Eurostat should take the lead. One of the risks is that the responsibility is not clear.

*Maturity: apply the maturity model to one or more NSIs?*

An assessment can be done on a organisational level or on a specific level for instance methodology. Take into account a set of criteria and measure your NSI.

Marc makes a statement about how he experiences how the maturity model is handled, not only today but also in the project. The focus in the project is on methodology and IT to lead the way.

Not many are interested in the maturity model while the model will give insight from an organisational point of view on which level of maturity the organisation stands, so you know how to act or know what the major risks are.

*How should countries prepare for a smart survey?*

The goal is a working app. The group brainstormed and came up with lots of ideas and these were clustered to 5 essential topics.

* Resources (e.g. funding, preparing interviewers for app skills, help/support desk).
* Organisational (e.g. management commitment, shared vision, realistic expectations).
* IT (e.g. plan to maintain the app, enough IT-developers, meet the high expectations of respondents).
* Population (e.g. willing to use our app, easy to handle, well managed by the NSI, offer alternatives/mixed mode).
* Methodology (e.g. adapt/improve monitoring and evaluation of data collection).

Legal measures all clusters and is therefore not a topic on its own. Legal is underestimated (high risk).

**Our recommendation**

Having heard all the presentations and discussions, what are your recommendations? The recommendations can be to Eurostat, NSIs in general, methodology departments etc. on various themes.

The recommendations collected and discussed about among the participants lead to the following results (random and not prioritized):

* Innovate and take risks.
* Exchange should be facilitated by Eurostat and NSIs should actively share experiences.
* Involve all stakeholders during the whole process -> Interoperability.
* Put yourself in the position of the sample (target group).
* To Eurostat: maintain and support the SSI community and chosen governance model.
* Regular exchange (weekly) for specific projects (field test) with all participants.
* Eurostat must take more responsibility.
* Embrace change and remain open to possibilities.
* To NSIs: run parallel smart/non-smart tracks as long as is possible.
* Be smart by asking input.
* Don’t use tool just because it is in the toolbox.
* To NSIs: use the business model to launch smart survey.
* Motivate the entire organization and don’t forget to look at the impact on business process.
* To NSIs: involve Top-management in a common vision on smart survey.
* Collaborate and don’t try to do everything on your own.
* Define terms and goals at the start.

**Wrap-up and closure of the conference**

*Reflection by Jean-Marc*

The conference was a perfect opportunity for an overview of the project. It was very inclusive and full of energy. Within the project much is achieved and there are still challenges ahead. Eurostat will take notice of the deliverables of course and will look internally how to go further on the path of innovation.

But we all have to spread the information and experiences from this project by giving presentations to different audiences, at discussions about innovation (working groups, task forces), keep on experimenting with universities.

Building a community is not that straight forward, maybe we have to merge different communities and structure this and take into account governance. It won’t be easy but is necessary as we don’t want to loose the momentum.

*Closure*

Before closure of the conference Remco remarks that the conference was energetic, with beautiful presentations, serious but also with time for socializing and fun.

He learned a lot in the past two years, the project was not easy, wish we could have done more. There was a lot of expertise in the project on business, legal, it, methodology. Unfortunately the future is uncertain.

Peter takes the opportunity to thank Remco for his excellent role not only at the conference but in the whole project as well.