EDA

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DIGITALISATION
SURVEY
2023

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SURVEY 2023

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WELCOME

Welcome to the EDA's first bespoke digitalisation survey. It was commissioned to coincide with three important anniversaries:

- the 6th anniversary of the introduction of the ETIM product data standard to the UK by the EDA in 2017

- the 3rd anniversary of the launch of EDA's industry datapool, EDATA,in 2020, and

- the 3rd anniversary of the formation of ETIM UK Ltd - our joint venture with the Builders Merchants Federation (BMF), also in 2020.

I think you will all agree that since the EDA embarked on its digitisation odyssy in 2017, the topic of data is now high on the agenda of most companies. Responses in this survey are proof of that.

And there is still much to do to achieve even greater data awareness and data consciousness in this sector. Building on the findings of this survey we look forward to continuing to work with our Wholesaler and Manufacturer members to improve the availability of high quality data for the greater good of the sector and to helping to upskill our workforce in all things data.

Margaret Fitzsimons
Chief Executive

INTRODUCTION

This report presents the results of the Electrical Distributors' Association's first in-depth market research programme into the state of digitalisation within the UK electrotechnical supply chain.

Richard Appleton
Head of Digitalisation

KEY FINDINGS

- 35% of Wholesalers have an ecommerce enabled B2B web site and a further 29% intend to install one within 12-24 months.

- There is significant use of EDI (Electronic Data Interchange) to trade between Manufacturers and larger Wholesalers but there is room for growth particularly with smaller Wholesalers.

- There is limited use of EDI and punch-out sites by Wholesalers to trade with their customers. Automating these transactions offers significant opportunities but there are technical, cost and cultural barriers to overcome.

- Most Manufacturers support a facility for Wholesalers to download product data sheets from an on-line industry data pool and most support expansion of the data pool to include other types of data such as packaging data and data relating to energy usage and embodied carbon.

- The main source of product data for Wholesalers' web sites is direct from the Manufacturers. There is strong support for an industry data pool provided it is comprehensive and up to date.

- Wholesalers expect to lose some business in commodity products to on-line platforms. However, for sales of more technical products, Wholesalers have the edge because they can offer product knowledge and a better service.

- Improving customer service is seen as the most important driver for digitalisation. Cultural change is the most important obstacle.

- There is strong agreement that Manufacturers should be the "single source of truth" for product data and that trade associations should take the lead in developing product data standards and supporting Manufacturers in their adoption.

OBJECTIVES

- To gain a clear, accurate picture of the current state of digitalisation in the UK electrotechnical supply chain with a specific focus on Wholesalers and Manufacturers and the sale and distribution of electrotechnical products.

- To provide valuable market information and insight for Electrical Wholesalers, Manufacturers and Solution Providers to use when developing their company and digital strategies.

- To understand better how the EDA can help and support digitalisation in the sector.

METHOD

- The research programme was carried out by an independent market research agency. All responses are therefore anonymous from the EDA's perspective.

- Quantitative feedback was obtained through an online survey:

  66 Wholesalers responded to the initial survey out of a total of 310 people who were invited to complete it, representing a 21% response rate.

  56 Manufacturer contacts responded out of a total of 256 people who were invited to complete it, representing a 22% response rate.

  The lead contact for each EDA business, plus the EDATA and ETIM contacts, were invited to take part in the survey.

  The questionnaire was written by the EDA with input from the market research agency.

- Following the online survey, equal numbers of Wholesalers and Manufacturers were then interviewed by phone, allowing more qualitative feedback to be obtained.

REPORT

- Due to the volume of data gathered, we have had to be selective in preparing this report. We have tried to include the key quantitative data and present the supporting comments and opinions in an objective way.

- Many comments were very similar, and we have selected typical examples to avoid too much repetition. In some cases different respondents offered opposing points of view in which case we have attempted to reflect this.

- Figures quoted in the Further Analysis and Comments sections are generally obtained by cross analysing the answers to more than one question.

- Certain brands and software systems were mentioned by respondents, sometimes positively and sometimes less positively. To avoid misrepresentation we have omitted these comments.
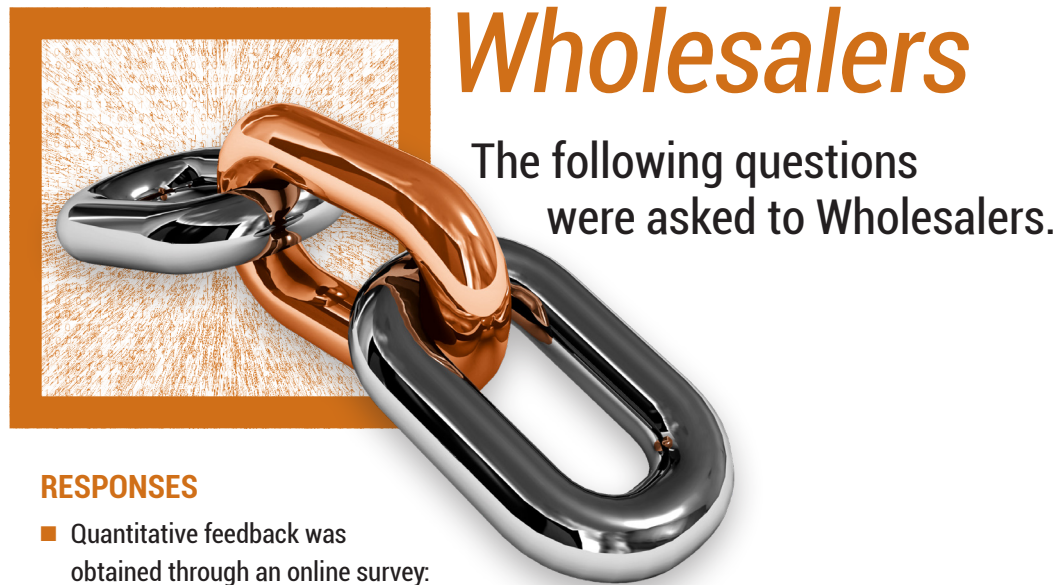
- All market research is subject to a margin of error and the nature of the sector means that the sample size is relatively small. We are confident that these results paint a reasonably accurate picture, but they should be used as guidance only.

SECTION 1

1.1 WHOLESALER RESPONDENTS

The following table shows the breakdown of Wholesaler respondents by their company size, measured by number of branches.

Wholesalers

The following questions were asked to Wholesalers.

RESPONSES

■ Quantitative feedback was obtained through an online survey:

66 Wholesalers responded to the initial survey out of a total of 310 people who were invited to complete it, representing a 21% response rate.

The lead contact for each EDA business, plus the EDATA and ETIM contacts, were invited to take part in the survey.

The questionnaire was written by the EDA with input from the market research agency.

■ Following the online survey, equal numbers of Wholesalers and Manufacturers were then interviewed by phone, allowing more qualitative feedback to be obtained.

8% Over 100 Branches

3% 51 - 100 Branches

3% 21 - 50 Branches

3% 16 - 21 Branches

15% 6 - 15 Branches

29% 2 - 5 Branches

38% 1 Branch

NB: In the report, where we refer to "small Wholesalers" we mean Wholesalers with up to 5 branches. "Medium/large Wholesalers" means Wholesalers with 6 or more branches.

1.2 EXTENT OF DIGITALISATION

The purpose of these questions is to understand the extent to which digital processes, notably sales processes are used by electrical Wholesalers.

Q Do you have an ecommerce enabled B2B website?

35% Yes

18% No, but we intend to launch one within 12 months

11% No, but we intend to launch one within 24 months

35% No

Q Do you have any of the following?

32% Retail / B2C web site

13% Customer-specific or punch-out sites *

31% Click & collect facility
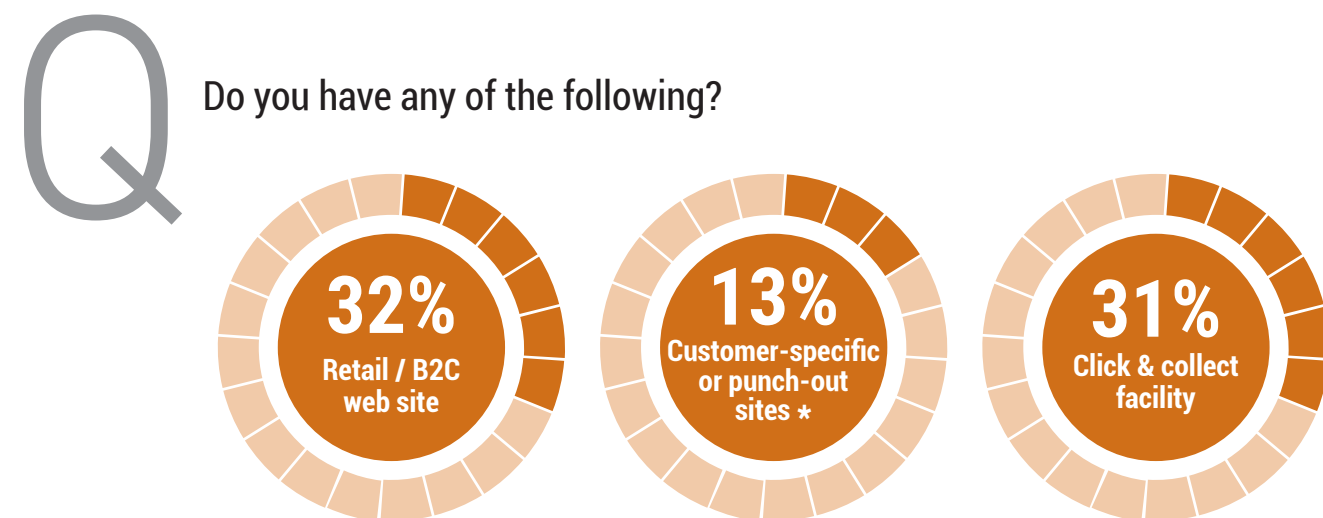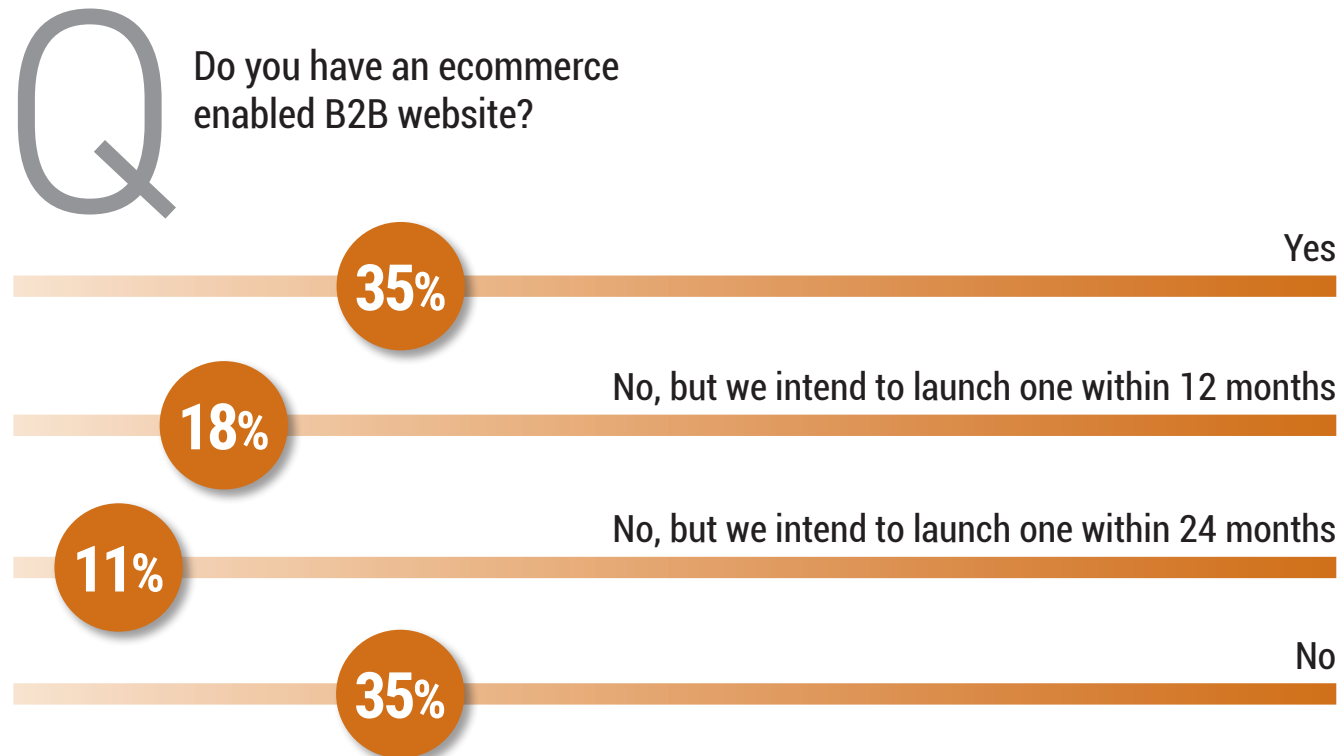
* **PUNCH-OUT SITE**:
This is a seller's ecommerce site that is available and manageable from within the buyer's eProcurement platform. They are ecommerce sites hosted and managed by the seller but accessed by the buyer's platform.

Q Do you you use EDI (Electronic Data Interchange) to trade with any of the following?

29% Manufacturers / Suppliers

10% Customers - Contractors

10% Customers - Others

51% No

FURTHER ANALYSIS

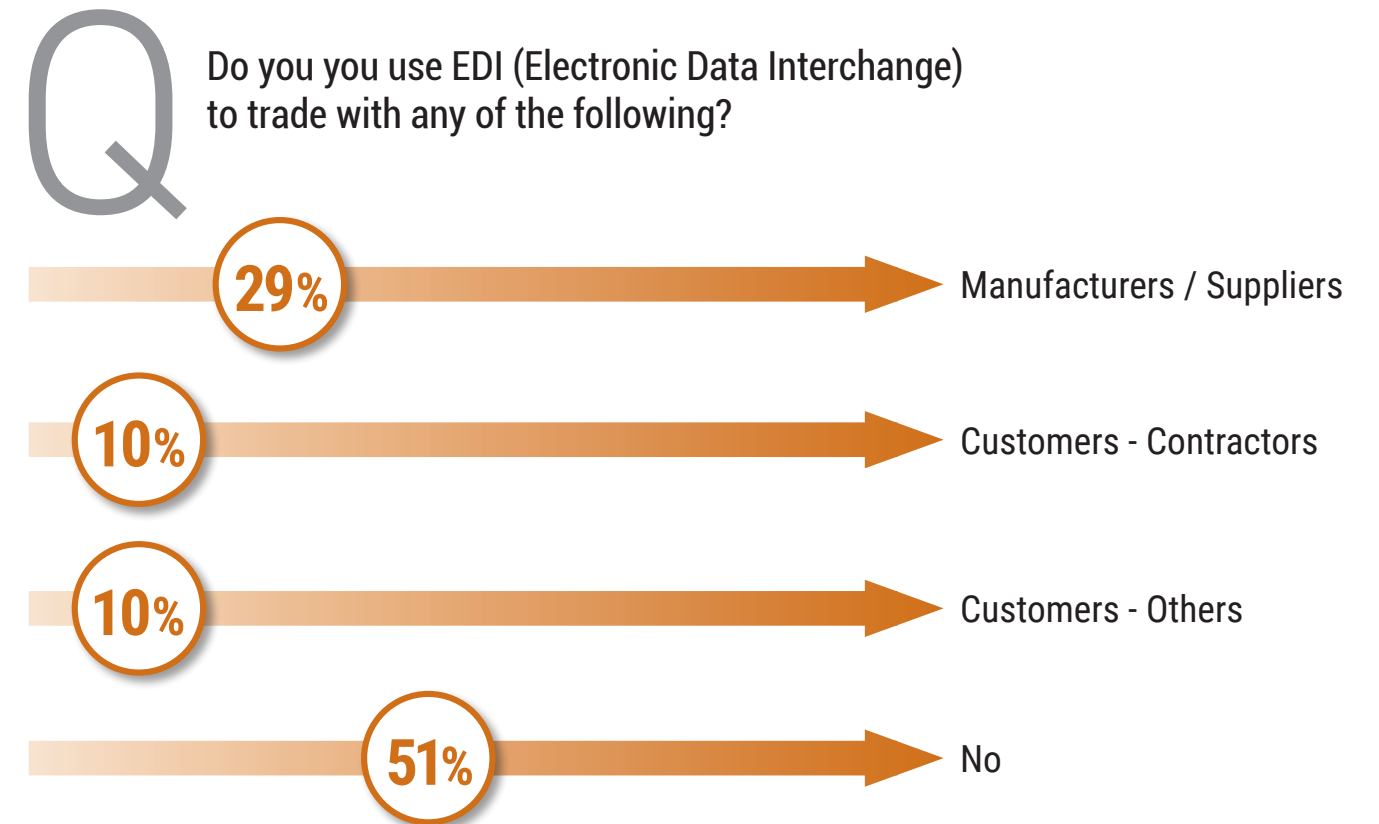■ A greater range of digital sales options is offered by medium/large Wholesalers. 57% of medium/large Wholesalers have an ecommerce enabled B2B web site compared with just 25% of small Wholesalers.

■ Despite increased interest during the pandemic, and a number of software providers offering stand-alone click-and-collect systems, there appears to be limited use of these. 79% of Wholesalers who offer this option also have a B2B ecommerce web site.

■ 26% of medium/large Wholesalers and just 7% of small Wholesalers offer customer-specific or punch-out sites.

■ 80% of small Wholesalers do not use EDI at all.

Our survey found there is limited use of both punch-out sites and the automation of sales ordering by Wholesalers' customers using EDI.

Q Do you feel there is potential to increase customer service and competitiveness by automating the sales order process, perhaps allowing orders to be sent directly from customers' procurement systems?

Q Appproximately what proportion of your sales is through online / digital channels?

" 100% yes. It's something we are striving towards. We have recently changed our ERP system and one of the main reasons for that was to get ourselves automated."

" We did wave goodbye to a very good customer because we haven't got a punch out site. The cost of setting it up was more than they spent with us in a year, so it was not economically feasible."

" Yes, but it depends on who the customer is and if they have the systems at their end to do that."

" Most of our customers are happy sending orders via email and over the phone. It is not something that our customers have asked us to do."

" Yes, there is obviously opportunity but the challenge for us as a business is the systems. Customers have different systems so do we account for them all or just a small section of our larger customers? Do we force our smaller customers who are not ready yet to go with it or do we offer a more flexible solution that covers everyone?"

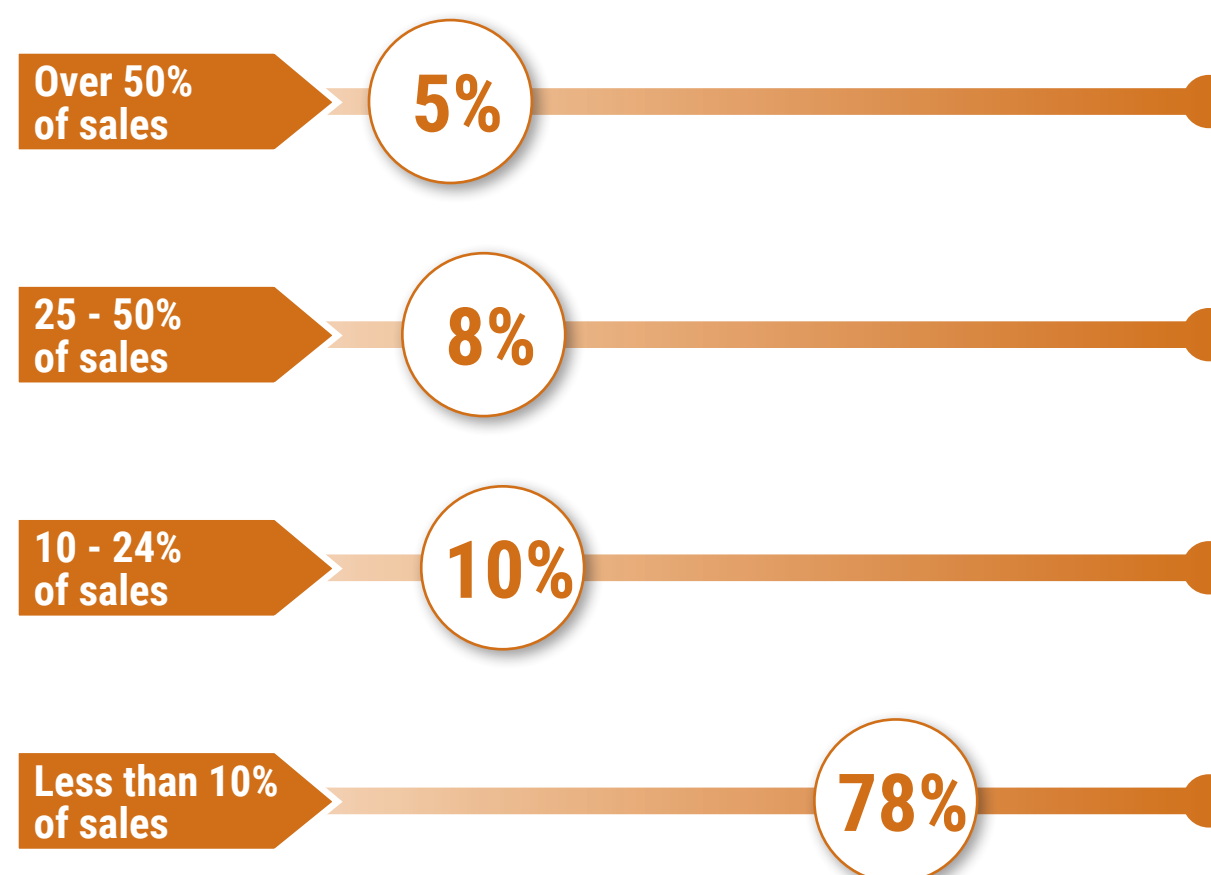" Not for sales as most of our customers still prefer to use the telephone or come into the trade counter."

" We do have EDI invoicing and we do have punch-out catalogues for some customers. We only do that because we see a benefit in it. I think it is something that demand is growing for."

Over 50% of sales	**5%**
25 - 50% of sales	**8%**
10 - 24% of sales	**10%**
Less than 10% of sales	**78%**

COMMENT

Customers increasingly research products online. However in order to make a purchase many have to issue a purchase order from their own ERP or procurement system so they can't purchase directly via a Wholesaler's B2B website using the shopping basket function. This suggests there are opportunities to be gained from automating links between Wholesalers' and their customers' systems. However it appears that technological, cultural and cost barriers are reducing the level of adoption.

1.3 PRODUCT DATA

The purpose of these questions is to obtain more details about Wholesalers' use of digital product information

Q In the next 5 years will the volume of sales through digital / on-line channels...?

More than double — **13%**

Double — **5%**

Increase but less than double — **39%**

Stay about the same — **44%**

Q How do you obtain product data for your web site(s)?

42% We get it from Manufacturers

32% We create the data ourselves

17% We import it from industry data pools

14% We import it from other data services

37% We do not have an ecommerce or punch-out site

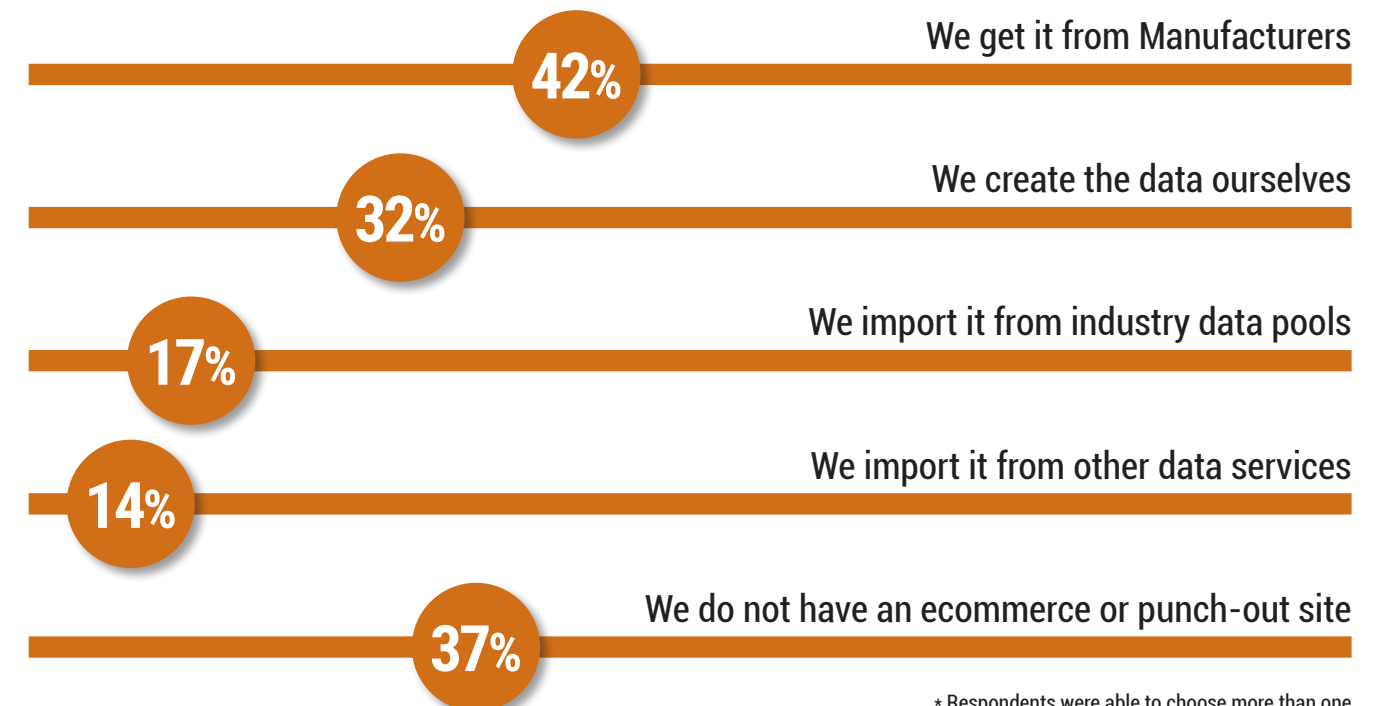* Respondents were able to choose more than one answer which is why the total exceeds 100%.

COMMENT

- The volume of sales through digital/on-line channels is relatively small. However, anecdotal evidence suggests that many customers research products on-line even if they continue to purchase using traditional methods. In this context, a Wholesaler's web site is part of an "omnichannel" sales strategy whose contribution cannot be measured on direct sales alone.

- There are mixed views regarding expected growth in sales through digital/on-line channels. A better understanding of trends in buyer behaviour would be useful to project if or when the current technological or cultural barriers will reduce.

COMMENT

There is strong support for an industry data pool, albeit with some reservations. The following comments are typical:

- "It would be great to have one place where we could go for information. It would save us time as we wouldn't have to go to different Manufacturers' websites and chasing suppliers for datasheets."

- "[A data pool] would only be worth it if the vast majority of Manufacturers were on there and invested in it in terms of keeping everything updated."

Q Do you have, or intend to install, a Product Information Management (PIM) system where you manage product data in a centralised repository?

31% YES
We have one now

11% YES
We intend to install one within 12 months

14% YES
We intend to install one within 24 months

45% NO

Q Do you use bar codes for stock management / point of sale?

14% YES

22% No
But we intend to in the future

49% NO

15% ?
Don't know / Did not answer
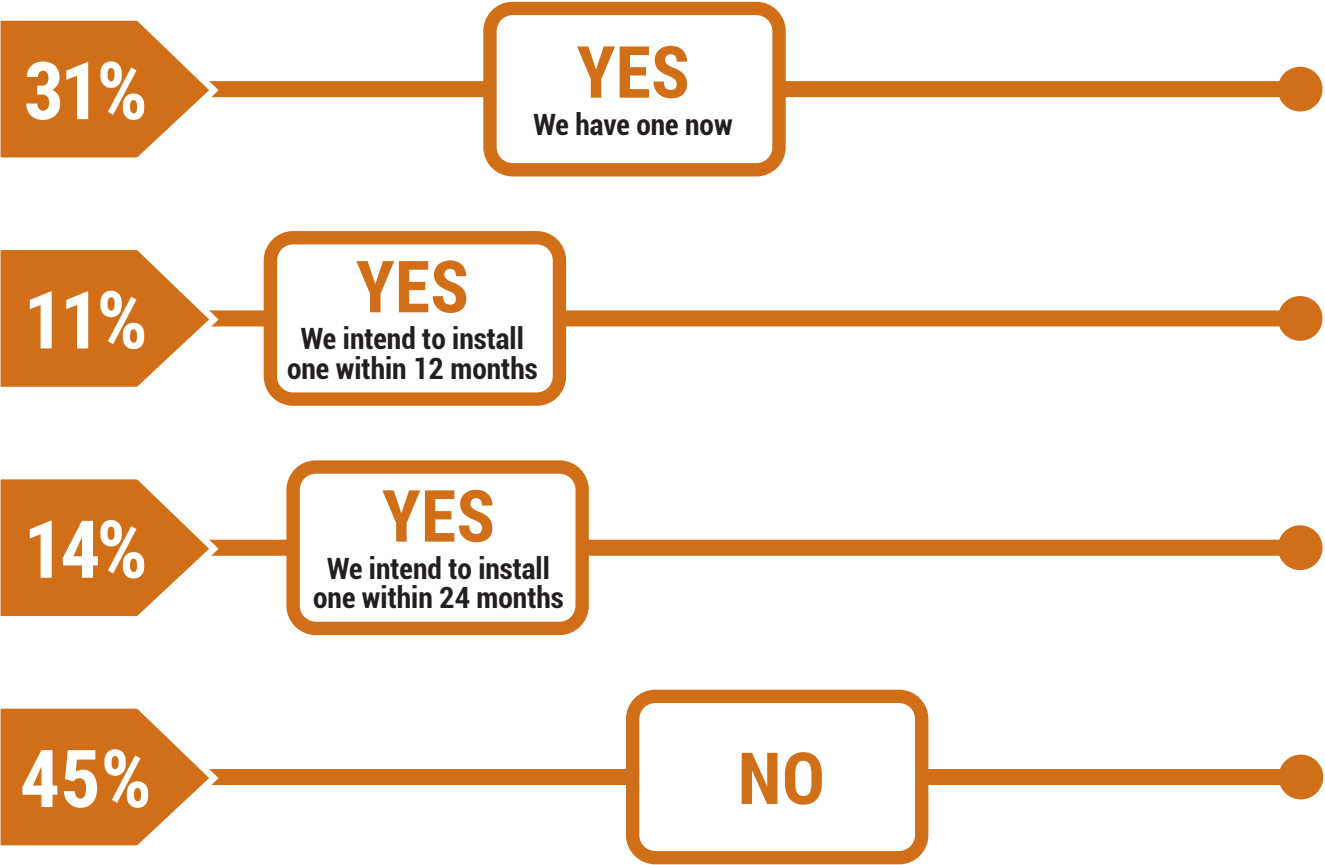
FURTHER ANALYSIS

- 57% of medium/large Wholesalers but only 18% small Wholesalers have a PIM system now.

- 59% of small Wholesalers have no PIM system or plans to install one.
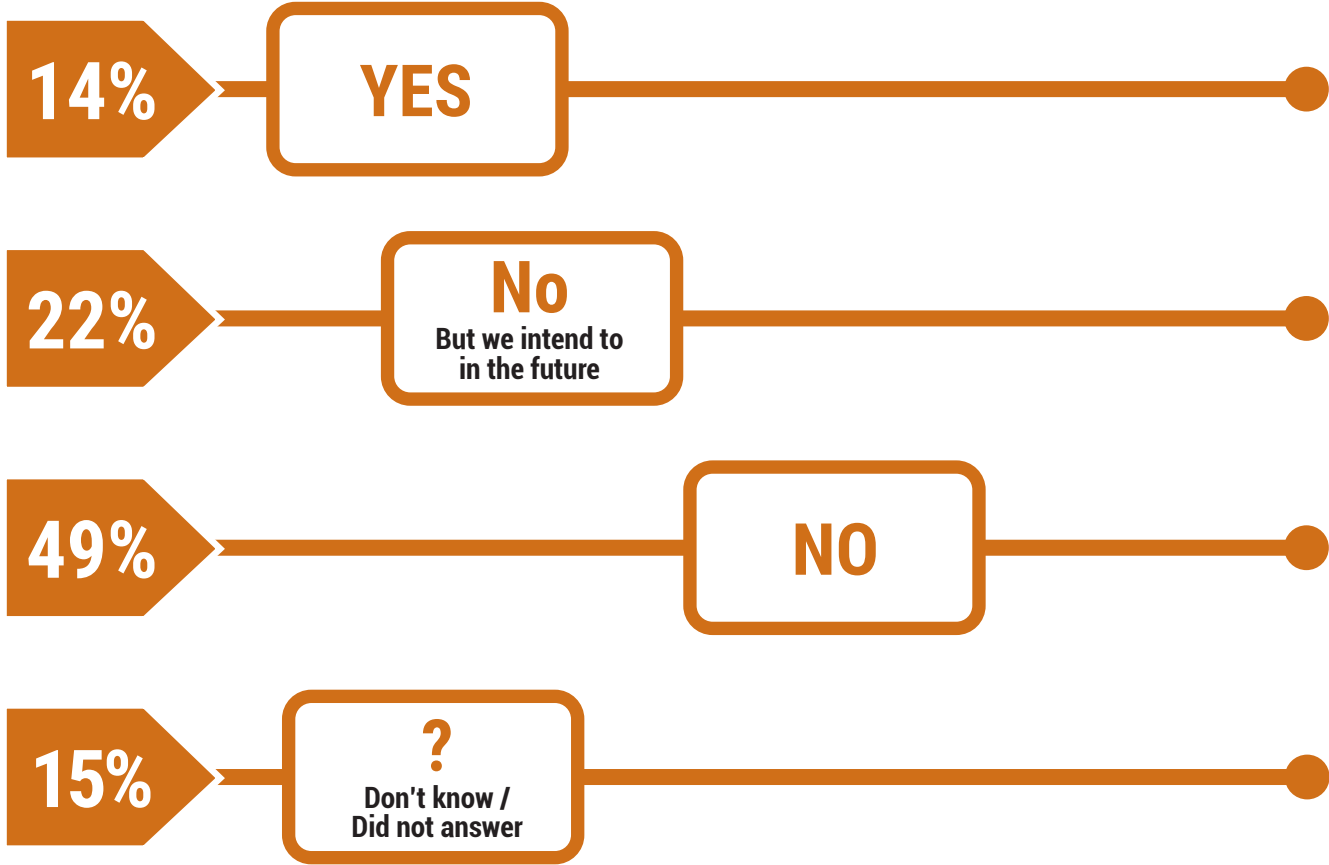
1.4 MARKET TRENDS

The purpose of these questions is to understand electrical Wholesalers'
opinions on key issues and market trends affecting their sector

Q Thinking about digitalisation in the electrical
wholesale sector, to what extent do you
agree with the following statements?

By the end of the decade most orders placed with Wholesalers will be on-line

Product knowledge and personal service are more important than digital sales channels

The electrical wholesale sector is losing out to on-line marketplaces

Wholesalers can't digitalise without high quality Manufacturers' product data

0%   20%   40%   60%   80%   100%

■ Strongly Agree   ■ Somewhat Agree   ■ Neither Agree nor Disagree   ■ Somewhat Disagree   ■ Strongly Disagree
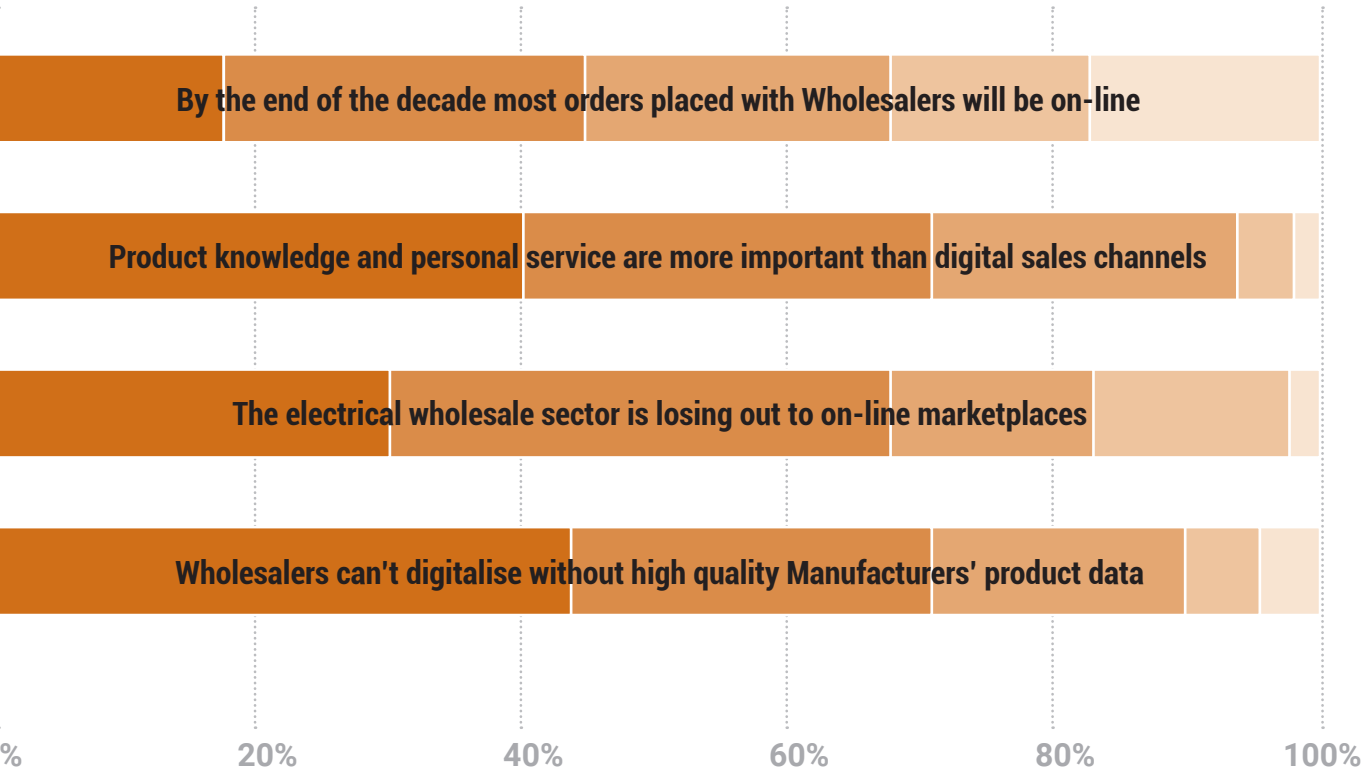
Q Feedback tells us that the electrical wholesale sector is
losing out to on-line marketplaces. But we are also told
that the product knowledge and personal service which
Wholesalers offer are more important than digital sales
channels.

This appears to be contradictory. How do you think these
contradictory facts can be explained?

" More basic products
are being sourced on-line as it's
more convenient for the customer
(next day delivery) and the costs
are low but the Wholesaler is
still preferred for more technical
and complex products where
customers need advice and help
picking the correct products."

" I think this can
apply to every industry. When
the customer knows exactly what
they want it all becomes about the
price. When they need some help
or guidance and are not really sure
what they want, then they need
to speak to someone with some
knowledge."

" It's a complex
industry and for complex
products the local Wholesaler
offering solutions backed up with
product knowledge and service
will come out on top over online
marketplaces."

" It depends on who the customer is and the customer type.
Someone who is working on small jobs is more likely to come to us for local,
quick service. Someone who is working on a larger project is more likely to
price it up and order online. Age is also a factor as younger customers are
more comfortable ordering online."

" We are always
going to lose out to the on-line
marketplace for the standard
items but it's the slightly off
the beaten track items where
Wholesalers like ourselves add
extra value because we have got
the knowledge."

Q

How do you think Wholesalers can harness their traditional skills of product knowledge and personal service to counter the threat from on-line marketplaces?

"It's really challenging. We have a lot of small to medium size customers who just want to ring up and say: 'You know those light fittings I usually have, send me another 10 on the van today'. They don't want to have to give you the part numbers or log on somewhere. They want to ring you when they are driving and say: 'You sort it for me, get it on site for 10 o'clock'. That's where we differ and that's where I think we potentially won't see the decline that's happened in the retail sector because we are going that extra mile."

"We pride ourselves on our service, we train our staff very well, so they can offer a solution for our customers. For the complex products I don't think the online marketplaces can offer the same standard of service and knowledge."

"We are trying to digitise some of the knowledge so we can offer product selectors to narrow down peoples' choices without them having to speak to someone from the sales team."

"Staff training so we are up to date technically with all the products and can offer the best service but also having an ecommerce website for the basic products."

"A Wholesaler should offer digital capabilities as an additional service to their current customers, not replace the traditional trade counters and one-to-one relationships. If a customer wants to come in and see someone to order, they can. But if they want to order online at 11pm at night they can do that too."

COMMENT

Wholesalers expect to lose some business in commodity products to on-line platforms. However, for sales of more technical products, Wholesalers have the edge because they can offer product knowledge and a better service. Maintaining this position requires ongoing training to make sure staff keep up to date as new products and technologies come onto the market.

SECTION 2

Manufacturers

The following questions were asked to Manufacturers.

RESPONSES

- Quantitative feedback was obtained through an online survey:

  56 Manufacturer contacts responded out of a total of 256 people who were invited to complete it, representing a 22% response rate.

  The lead contact for each EDA business, plus the EDATA and ETIM contacts, were invited to take part in the survey.

  The questionnaire was written by the EDA with input from the market research agency.

- Following the online survey, equal numbers of Wholesalers and Manufacturers were then interviewed by phone, allowing more qualitative feedback to be obtained.

2.1 MANUFACTURER RESPONDENTS

The following table shows the breakdown of Manufacturer respondents by their company size, measured by number of employees.

LARGE: 250+ Employees

MEDIUM: 50 - 249 Employees

SMALL: 10 - 49 Employees

15%

37%

48%
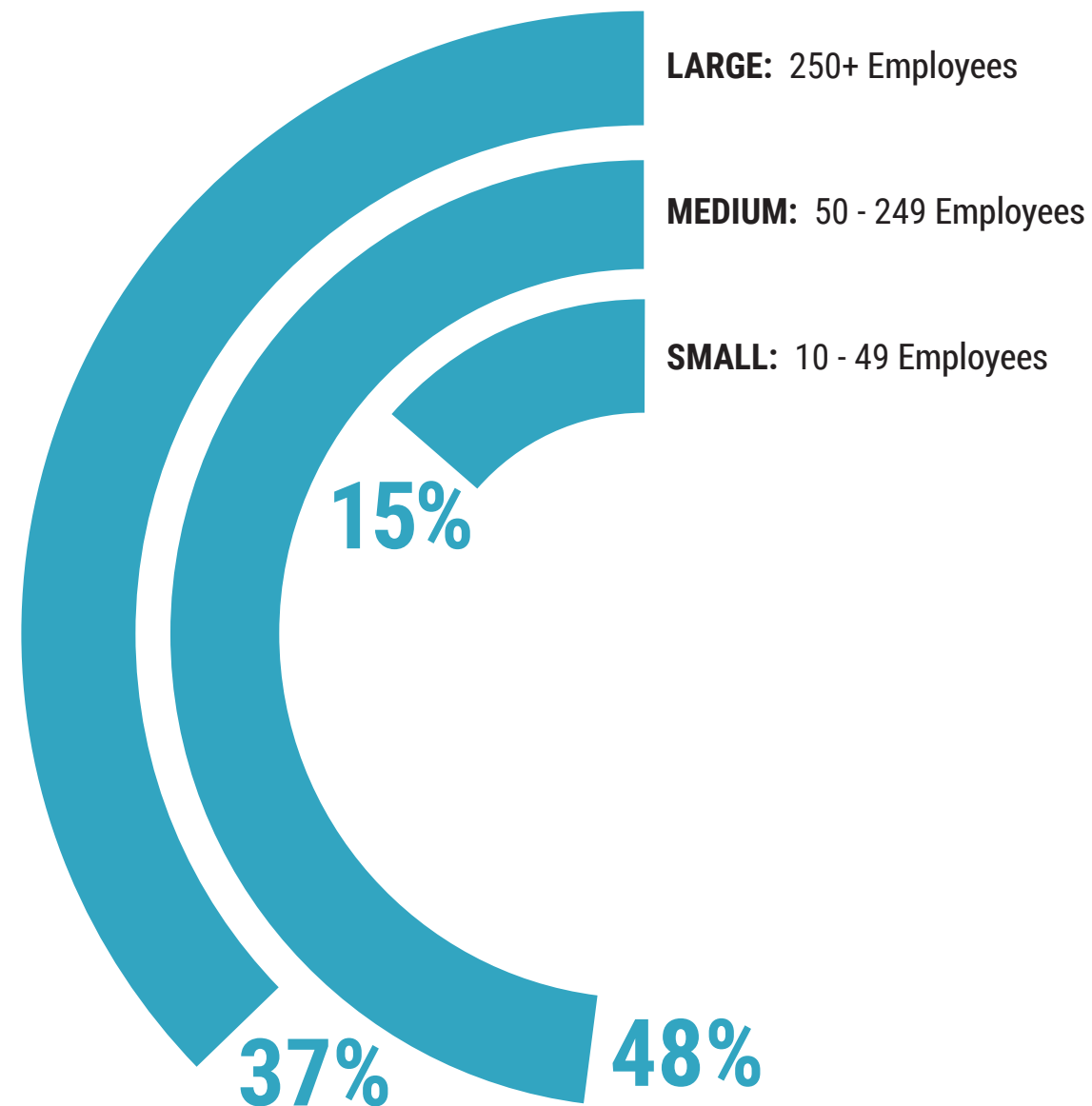
2.2 EXTENT OF DIGITALISATION

The purpose of these questions is to understand the extent to which digital processes, notably sales processes, are used by Manufacturers of electrotechnical products.

Q Do you use EDI to trade with Wholesalers?

70% YES

11% No
But we intend to within 12 months

2% No
But we intend to within 24 months

18% NO

2.3 PRODUCT DATA

The purpose of these questions is to understand the demands on Manufacturers for digital product information.
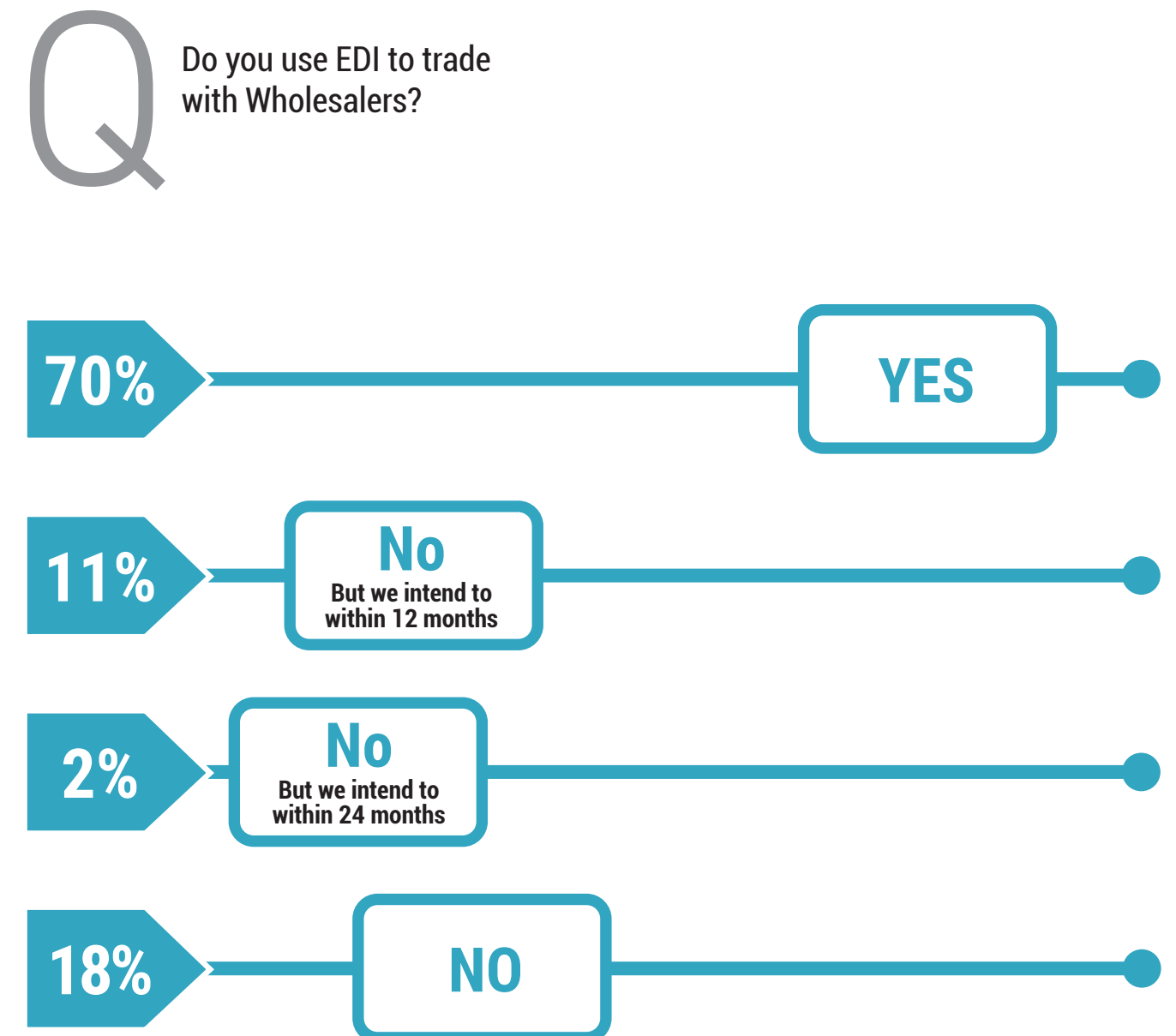
Q Do you have an on-line customer portal where Wholesalers can place an order?

46% YES

20% No
But we intend to within 12 months

7% No
But we intend to within 24 months

27% NO

Q Do you provide digital product data directly to any of the following?

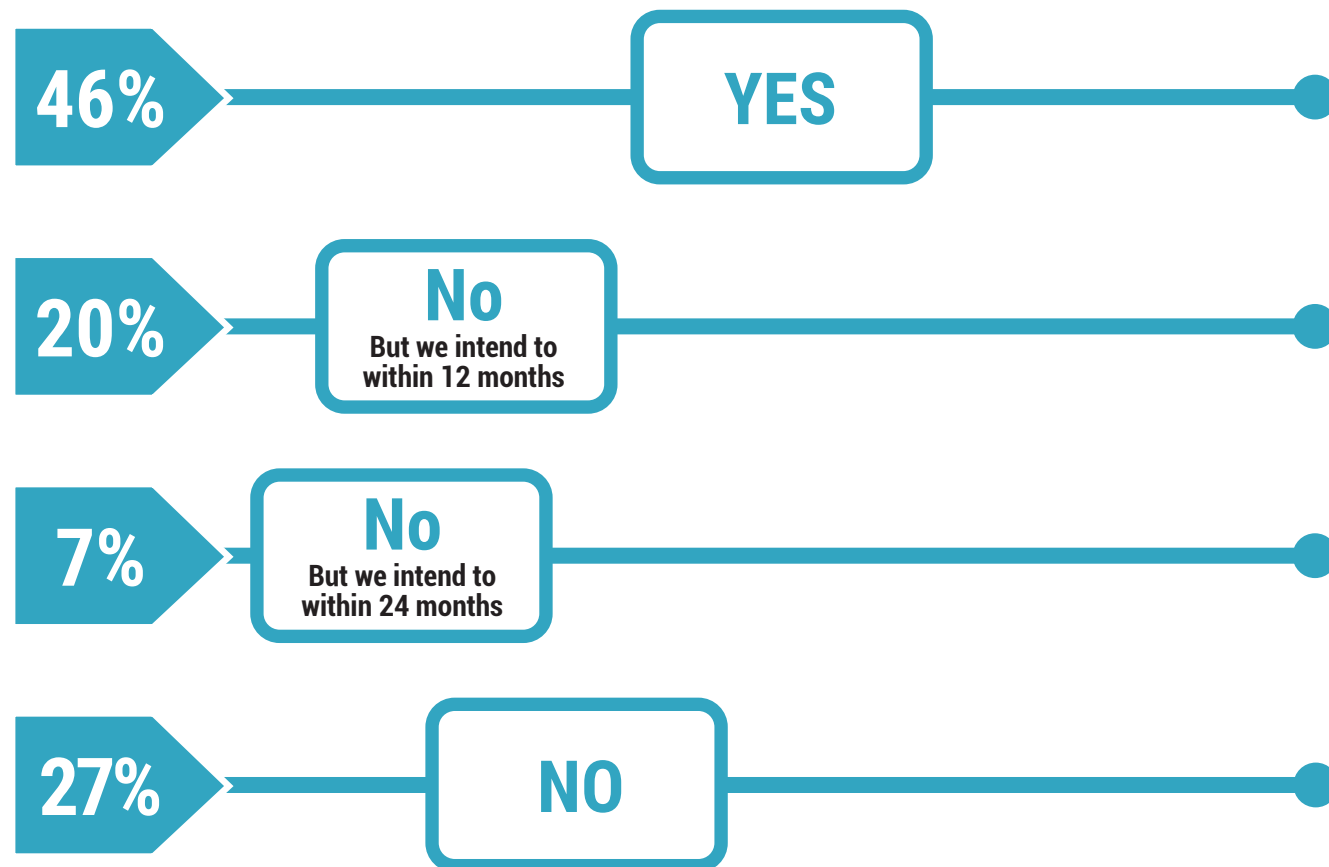|	
Electrical Wholesalers	91%
Contractors	53%
On-line markplaces	44%
Architects or other specifers	31%
Industry data pool(s)	31%
Retailers	25%
Builders' merchants	22%
Third party commercial data pool(s)	19%
Energy Technology List (EST)	6%
European Product Registry for Energy Labelling (EPREL)	3%

* Respondents were able to choose more than one answer which is why the total exceeds 100%.

FURTHER ANALYSIS

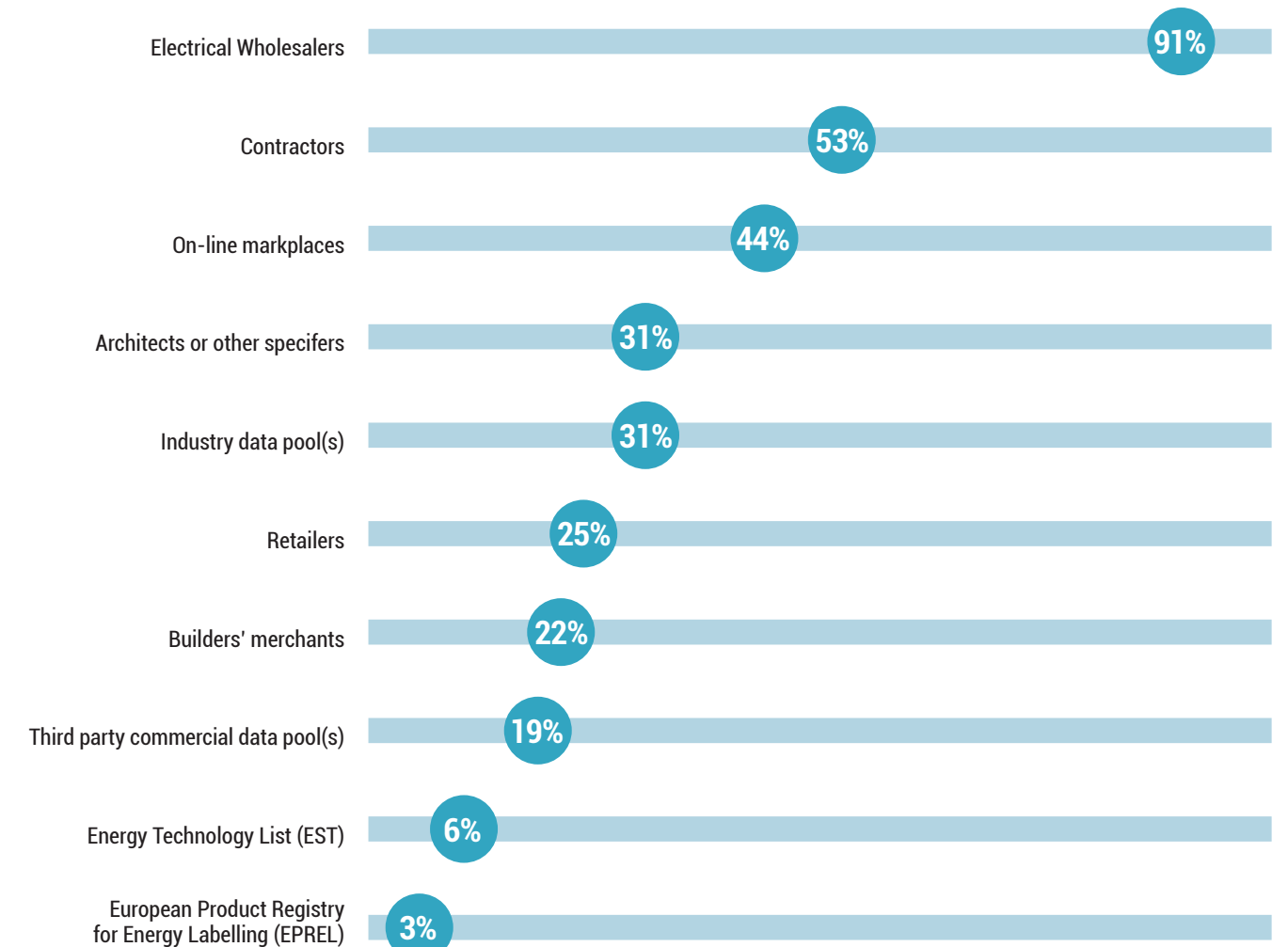- 80% of Manufacturers said they use EDI only to trade with large Wholesalers.

- As indicated in the following quote, some Wholesalers actively favour suppliers who offer digital sales channels:

" As Wholesalers we like to work with suppliers who have an automated service.
If I have the choice of two suppliers, I will buy from the one with a B2B portal. It gives me accuracy - I can see all my pricing and availability of stock."

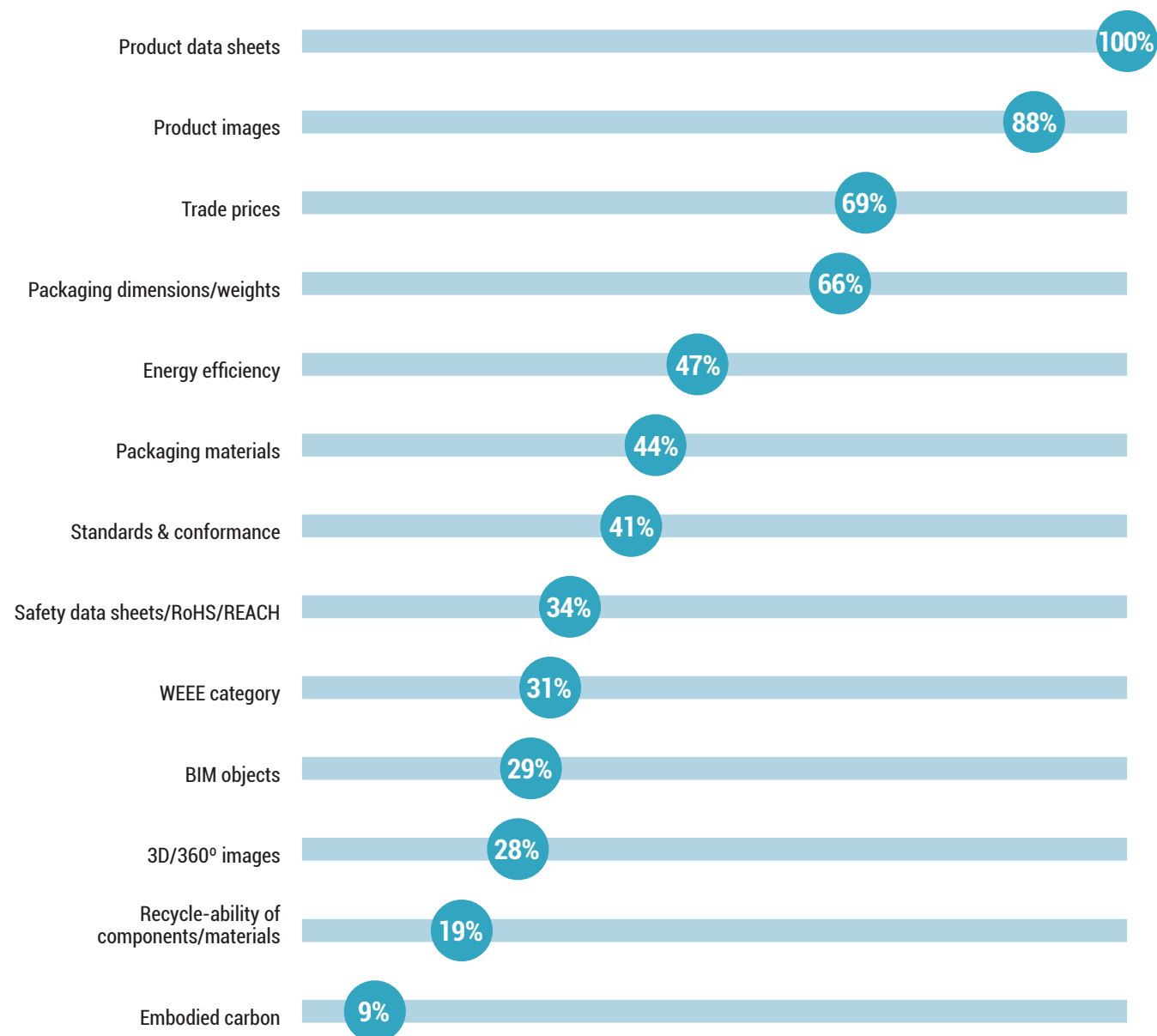Q Which of the following types of product data
are you asked to provide in digital form?

Product data sheets	100%
Product images	88%
Trade prices	69%
Packaging dimensions/weights	66%
Energy efficiency	47%
Packaging materials	44%
Standards & conformance	41%
Safety data sheets/RoHS/REACH	34%
WEEE category	31%
BIM objects	29%
3D/360º images	28%
Recycle-ability of components/materials	19%
Embodied carbon	9%

* Respondents were able to choose more than one answer which is why the total exceeds 100%.

Q How many requests do you receive per month
for data sheets from Wholesalers?

Over 100	12%
51 - 100	9%
11 - 50	36%
Fewer than 10	42%
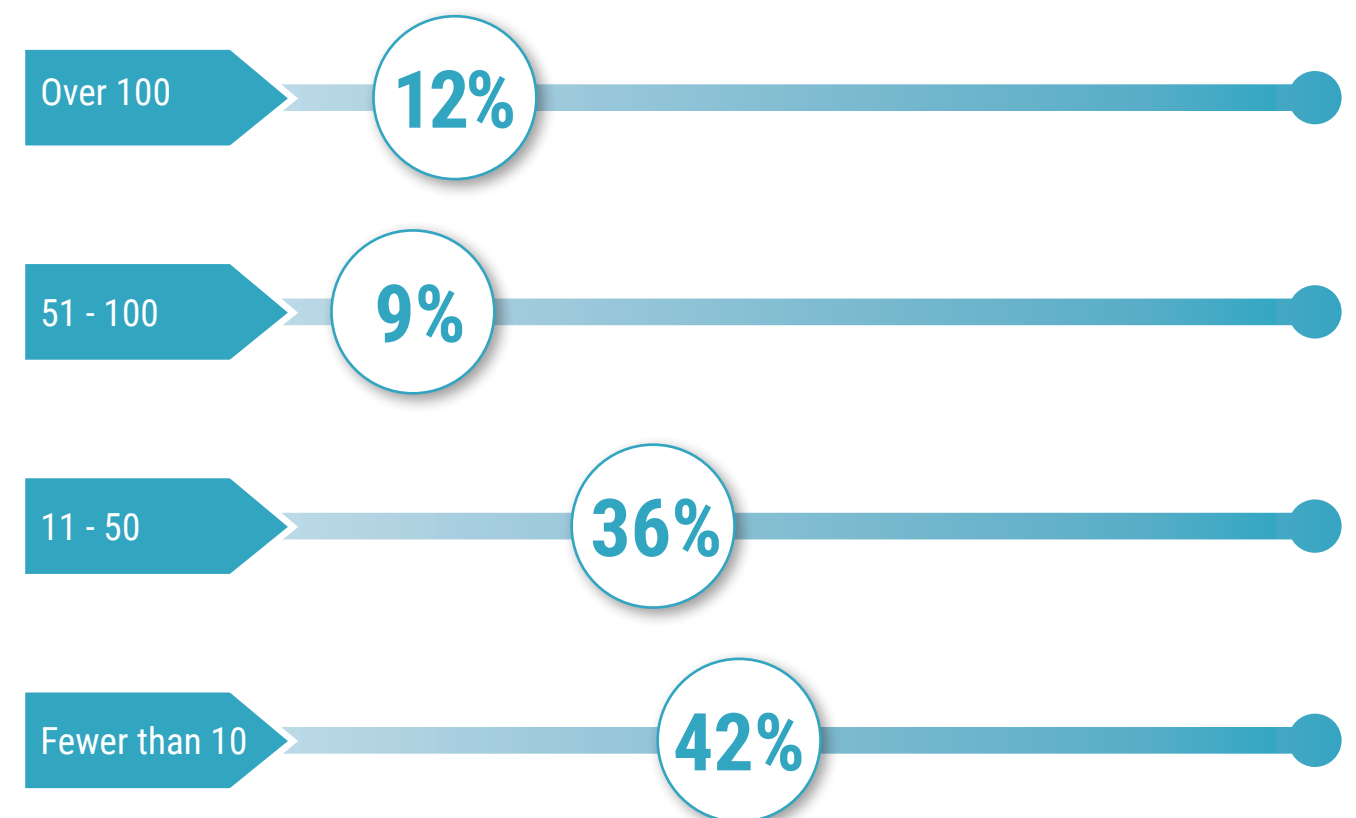
COMMENT

■ 90% of Manufacturers support a facility for Wholesalers to download data sheets from an on-line industry data pool which uses data supplied directly by the Manufacturer.

■ Packaging data including weights and measures and data relating to energy usage and embodied carbon were cited as priorities.

■ 80% of Manufacturers support the expansion of an industry data pool to include categories of data such as trade pricing, energy efficiency, safety data sheets, packaging dimensions, weights and materials. However some Manufacturers specifically said they would want to avoid including trade pricing.

Q Do you have, or intend to install, a Product Information Management (PIM) system where you manage product data in a centralised respository?

71% **Yes**
We have one now

15% **Yes**
We intend to install one within 12 months

4% **Yes**
We intend to install one within 24 months

11% **NO**
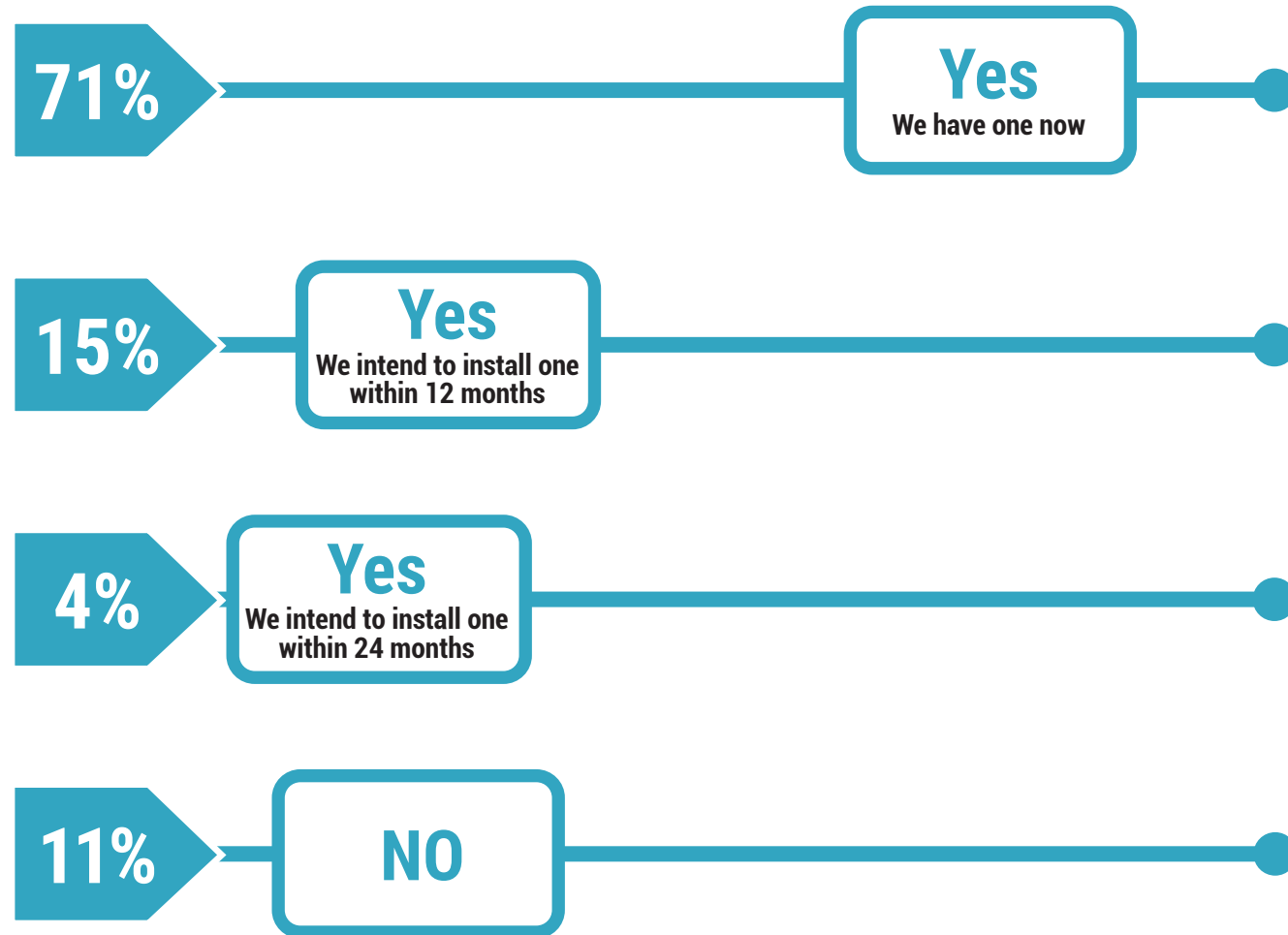
Q What proportion of your products are ETIM classified?

100% **24%**

Between 50% and 99% **32%**

Less than 50% **18%**

None **12%**

Don't know **15%**
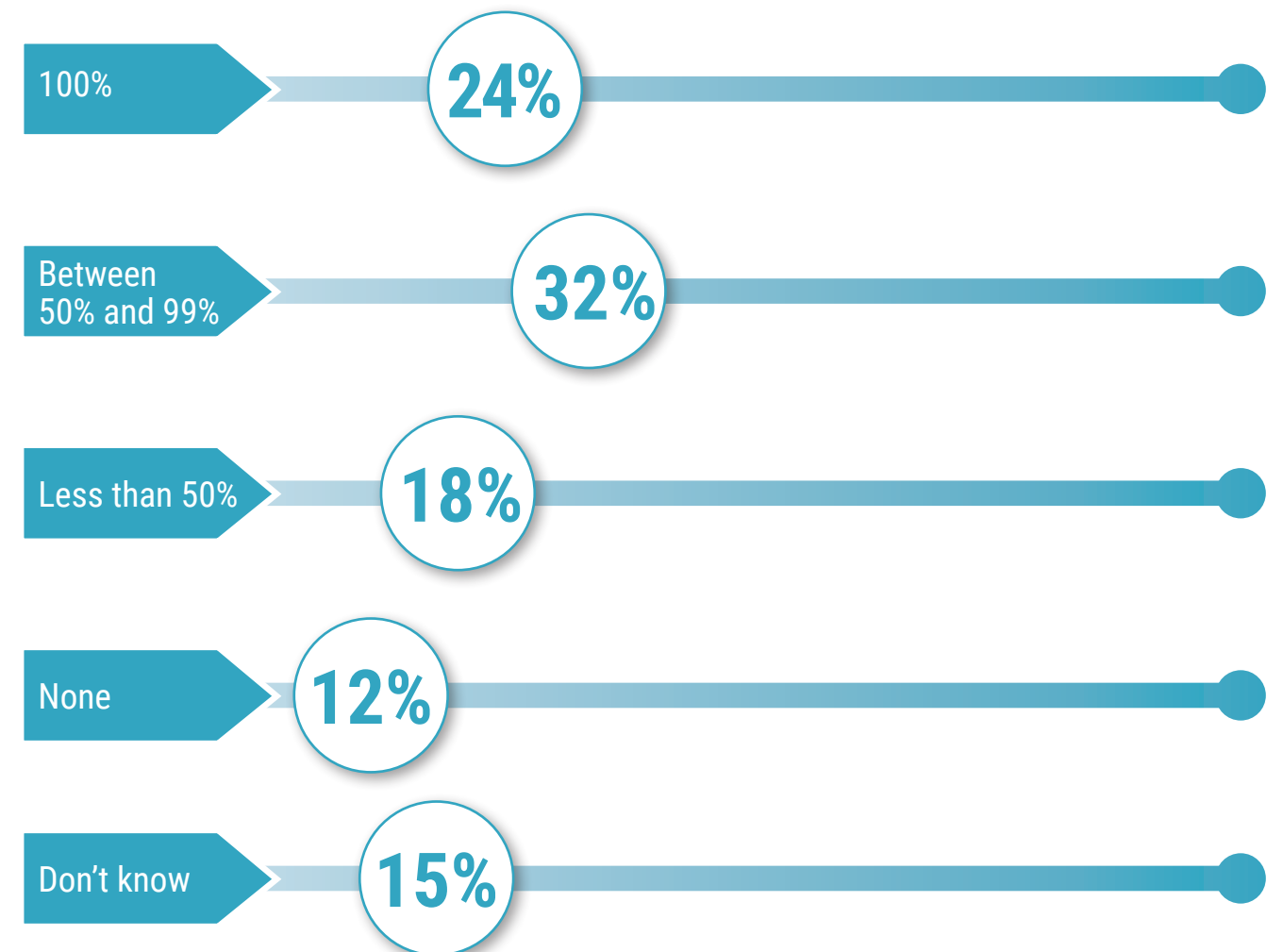
Q Approximately what proportion of your products have GTIN codes (=EAN or bar code number)?

100%	**58%**
Between 50% and 99%	**24%**
Less than 50%	**3%**
None	**6%**
Don't know	**9%**
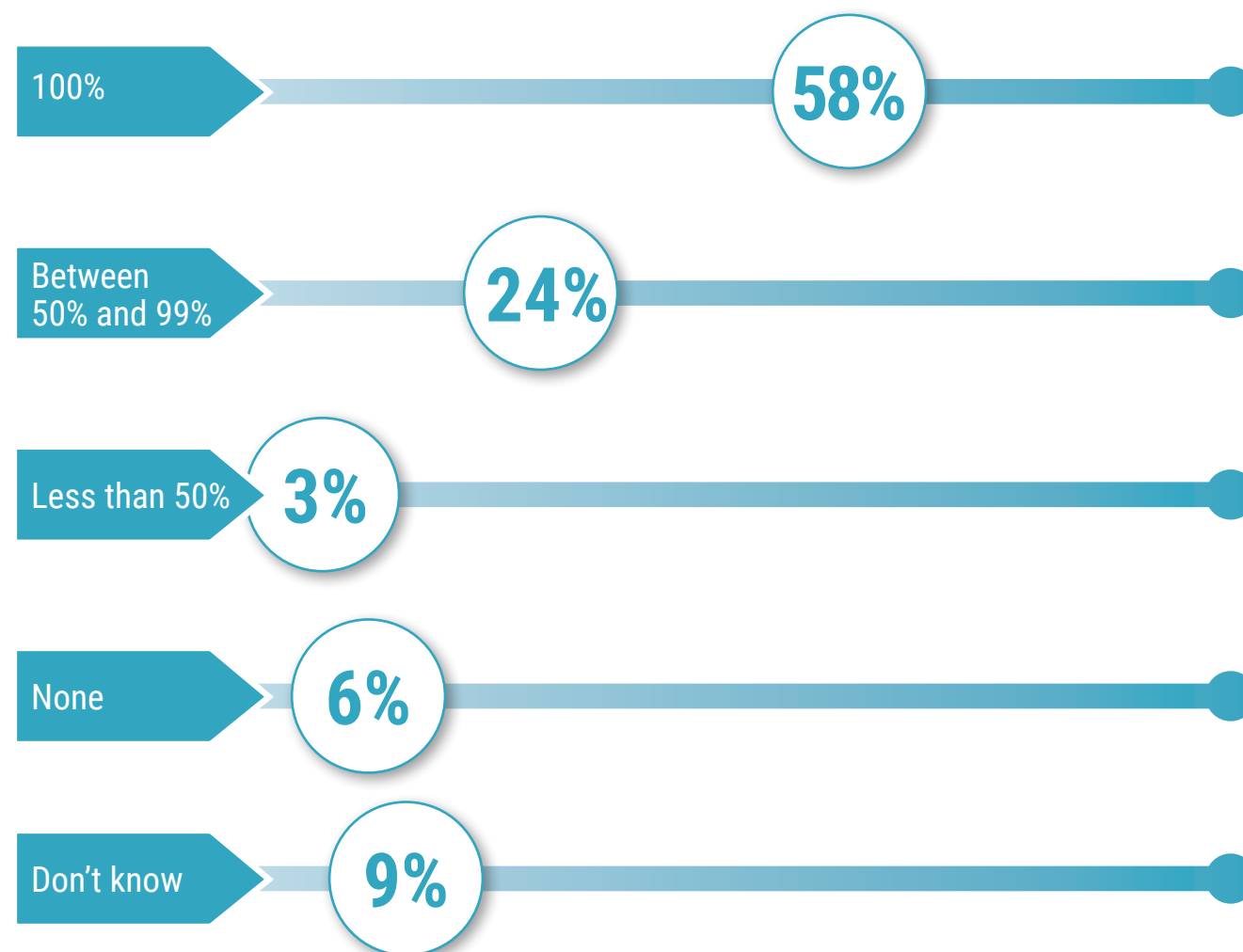
Q Are your products classified with any of the following?
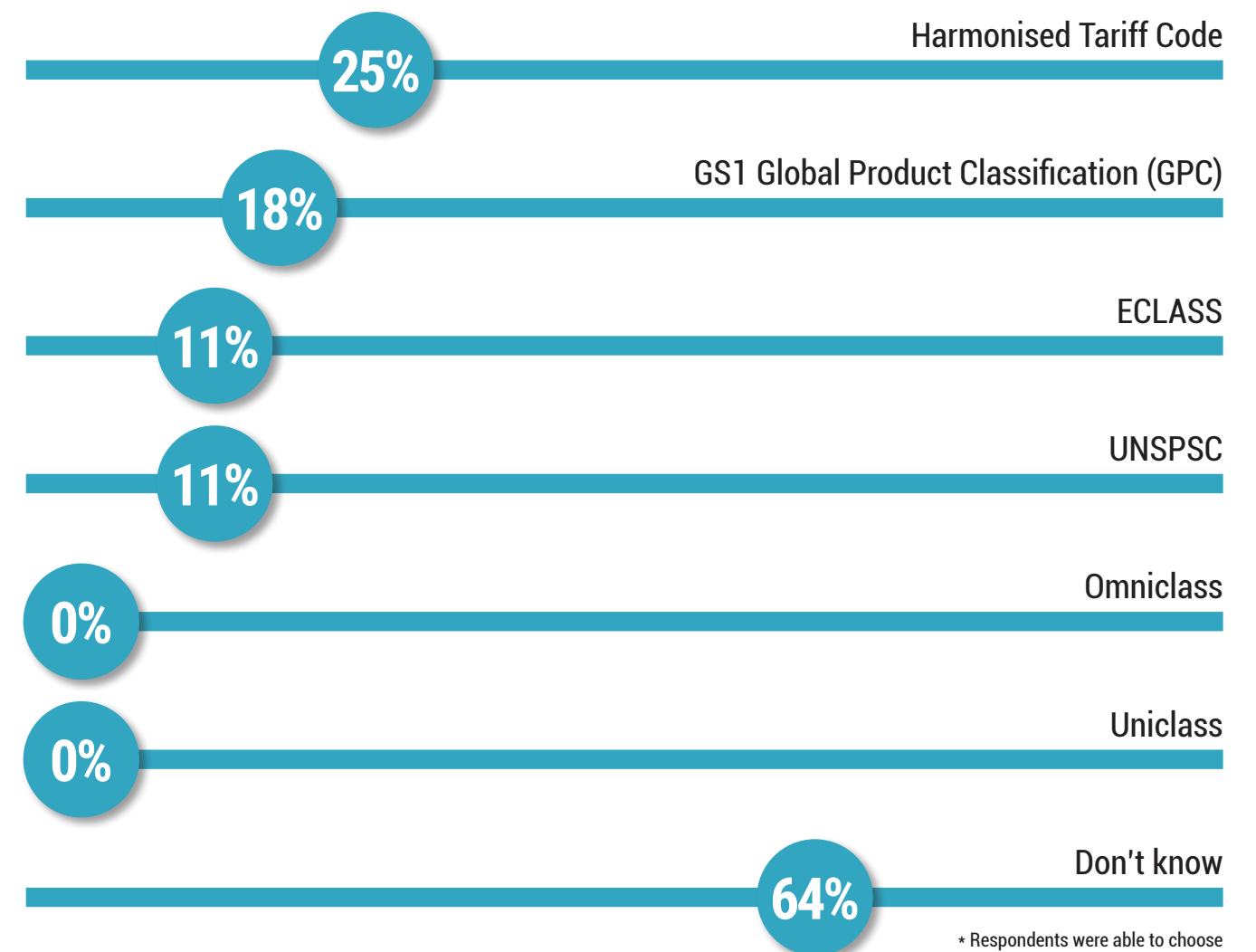
Harmonised Tariff Code	**25%**
GS1 Global Product Classification (GPC)	**18%**
ECLASS	**11%**
UNSPSC	**11%**
Omniclass	**0%**
Uniclass	**0%**
Don't know	**64%**

*Respondents were able to choose more than one answer which is why the total exceeds 100%.

COMMENT

The large proportion of "don't knows" and the lack of results for Uniclass (the standard classification method used for BIM in the UK) should be treated with caution. It may indicate that Manufacturers are managing data in multiple silos and that transactional/marketing data is managed separately from "BIM data".

2.4 KEY ISSUES & TRENDS

The purpose of these questions is to understand electrical Manufacturers' opinion on key market issues and trends affecting their sector.

Q **Will you be seeking Code for Construction Product Information (CCPI) accreditation?**
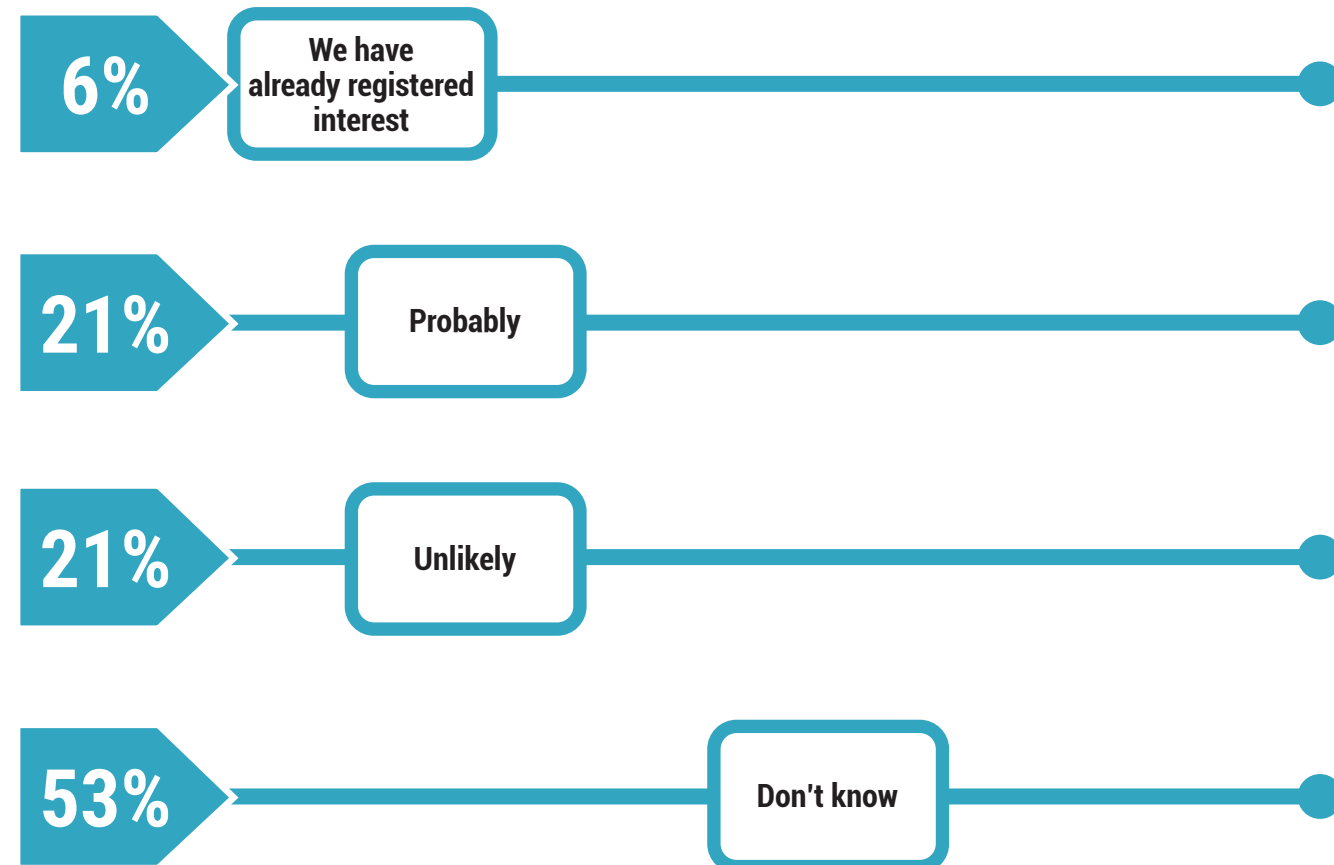
6% → We have already registered interest

21% → Probably

21% → Unlikely

53% → Don't know

Q **Thinking about digitalisation in the electrotechnical manufacturer sector, to what extent do you agree with the following statements?**
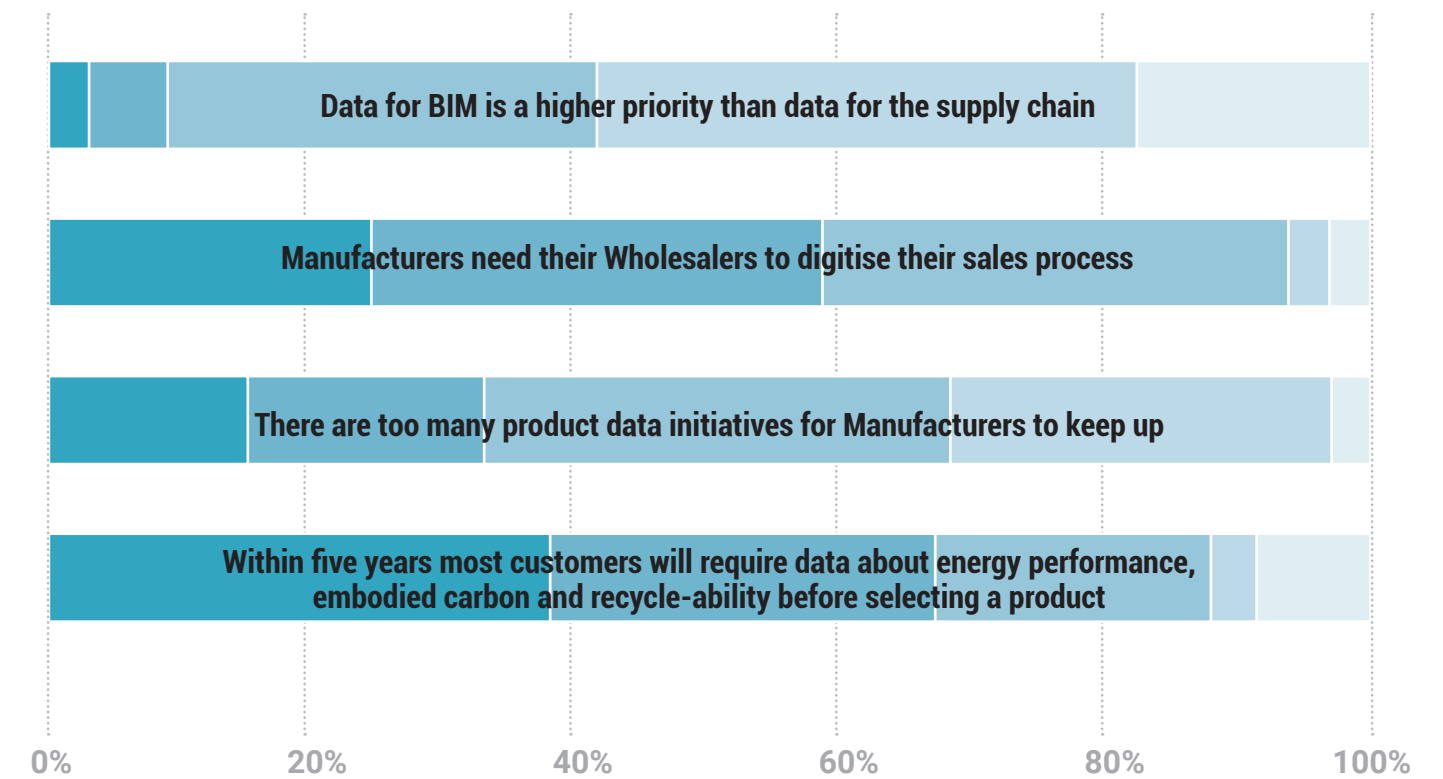
- Data for BIM is a higher priority than data for the supply chain
- Manufacturers need their Wholesalers to digitise their sales process
- There are too many product data initiatives for Manufacturers to keep up
- Within five years most customers will require data about energy performance, embodied carbon and recycle-ability before selecting a product

Legend: Strongly Agree | Somewhat Agree | Neither Agree nor Disagree | Somewhat Disagree | Strongly Disagree

Q How are you helping Wholesalers digitise their sales process?

" We are making sure that our data is good quality technically, but we are trying to ensure the data has good content, keywords, SEO. The average independent Wholesaler doesn't have time to do all that so we are trying to give them all the information in a form that they can easily digest.

" We make our product data available digitally as widely as we can. There is lots of information on our website. We openly share our data and input it into the data pool. If we get any individual requests, we will obviously supply them with that."

" "It's changed since Covid, but the biggest challenge historically is trying to get a data pool and build a website. The issue we see is their willingness to do it to start with."

" We have all the product information available for them to download in various formats to suit their systems."

" It's very difficult. We are trying to help them as much as possible, but the appetite isn't there."

Q What will be the outcome if digitising the Wholesalers' sales process doesn't succeed?

" In the next 5-10 years the buying habits of Wholesalers' customers will be more on-line focused and unless the Wholesalers buy into that they will lose business especially when it comes to commodity items."

" For basic items, they will potentially lose business to larger more digitalised Wholesalers and retailers but for more specialist items, they will still have an advantage and local customer base."

" If you are a good Wholesaler, and you offer a solution and are not just selling them a product you will be OK. You can't buy a solution on a website."

COMMENT

The EDA's events and digitalisation initiatives demonstrate a growing appreciation of the need for Wholesalers and Manufacturers to cooperate for the long term benefit of both. An increasing number of Manufacturers are taking steps to help their Wholesalers digitalise by providing product data that meets quality standards developed by the industry.
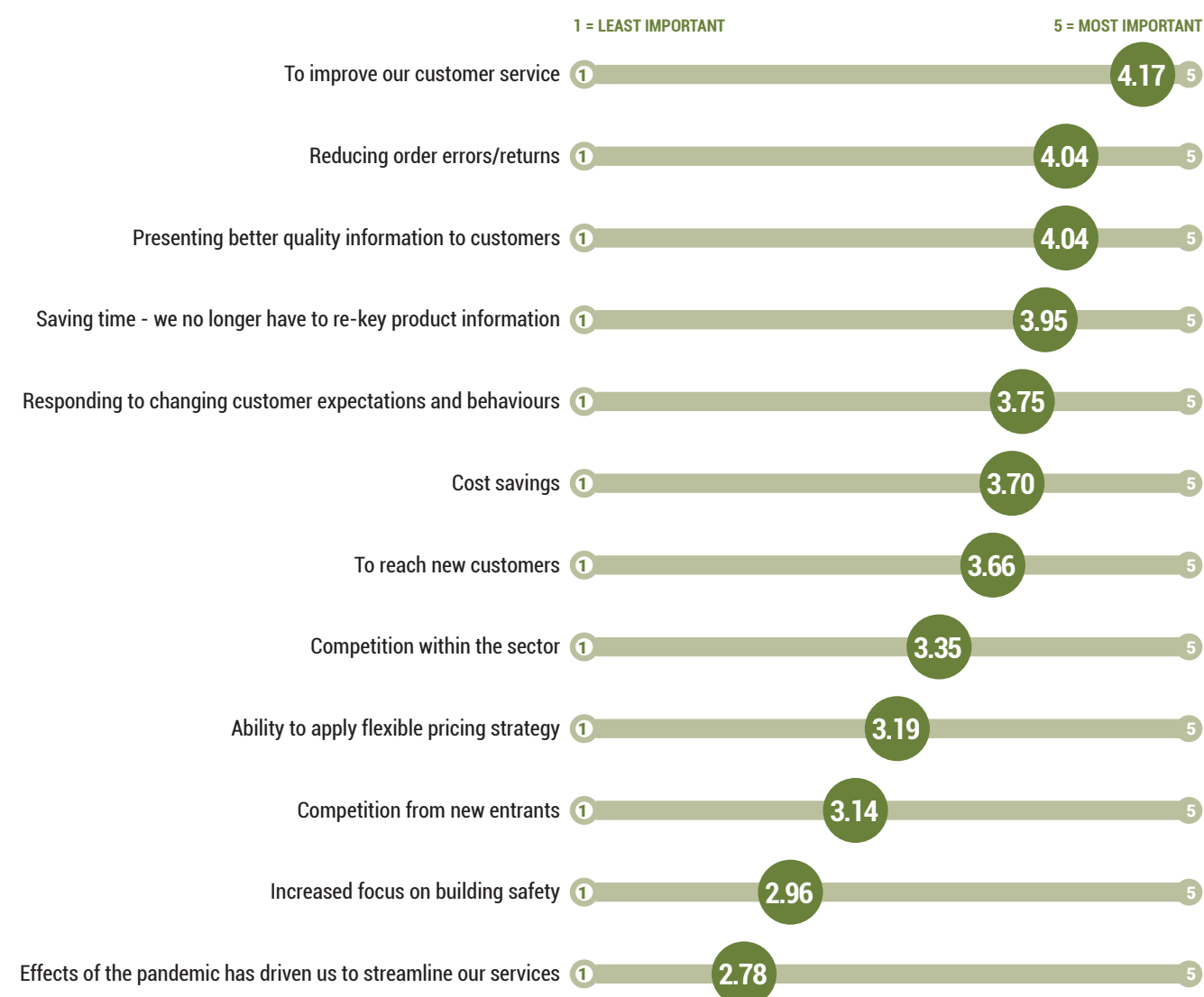
SECTION 3

All Respondents

The following questions were asked to both Wholesalers and Manufacturers.

3.1   DRIVERS TO DIGITALISATION

The purpose of this question is to understand the main drivers to digitalisation in the electrotechnical supply chain. Respondents were asked to indicate the importance of a number of drivers with 5 being the most important and 1 the least.
The chart below shows the average score for each.

1 = LEAST IMPORTANT   5 = MOST IMPORTANT

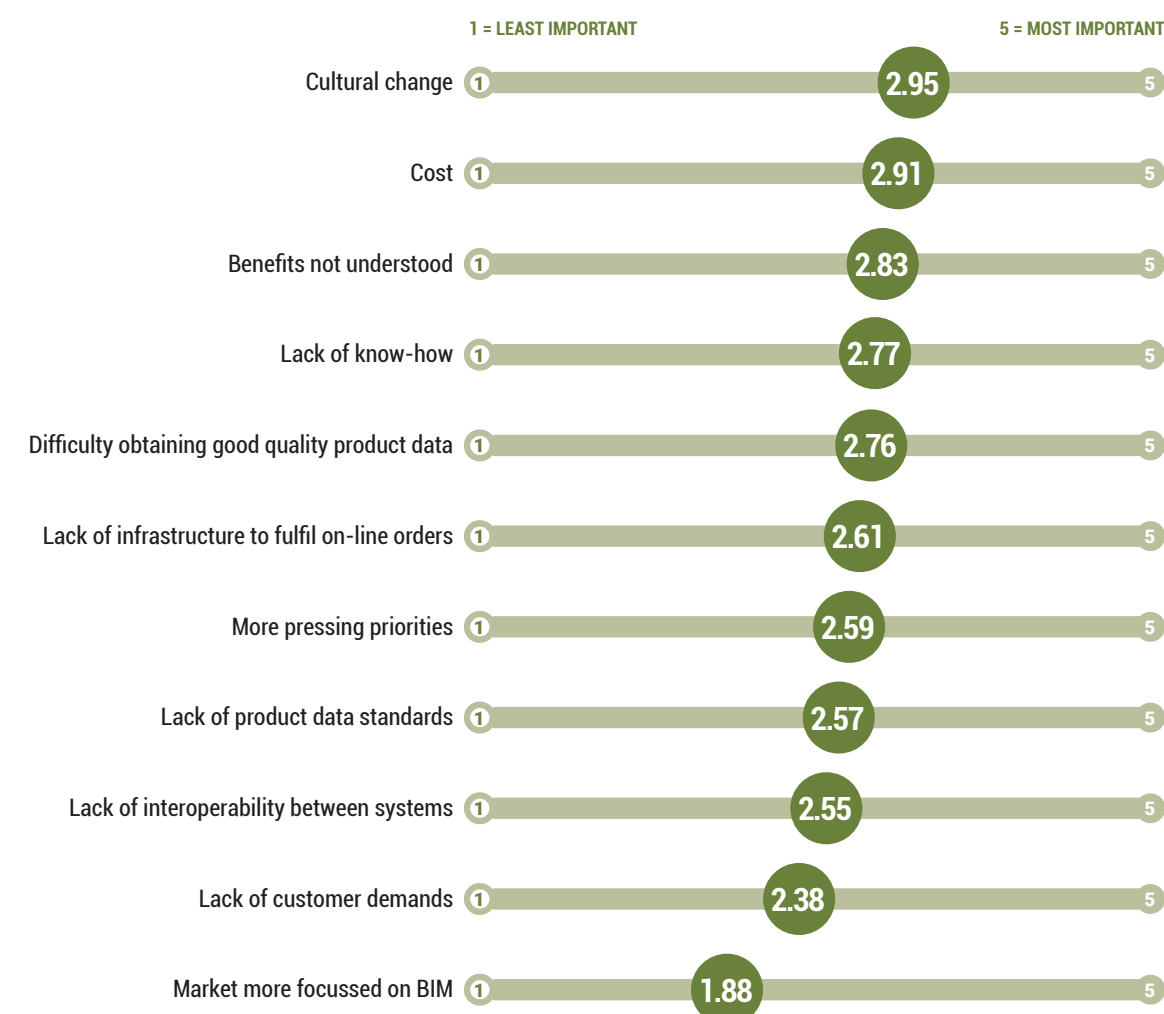| Driver	Score
To improve our customer service	4.17
Reducing order errors/returns	4.04
Presenting better quality information to customers	4.04
Saving time - we no longer have to re-key product information	3.95
Responding to changing customer expectations and behaviours	3.75
Cost savings	3.70
To reach new customers	3.66
Competition within the sector	3.35
Ability to apply flexible pricing strategy	3.19
Competition from new entrants	3.14
Increased focus on building safety	2.96
Effects of the pandemic has driven us to streamline our services	2.78

COMMENT

- Overall, the rankings were very similar for both Wholesalers and Manufacturers. The only notable exception was that "Competition within the sector" ranked significantly higher with Wholesalers.

- The main drivers are tactical issues relating to the individual businesses' efficiency and competitiveness. In future we might expect to see the importance of external factors such as building safety and net zero increase.

3.2   OBSTACLES TO DIGITALISATION

The purpose of this question is to understand the main obstacles to digitalisation in the electrotechnical supply chain. Respondents were asked to indicate the importance of a number of obstacles with 5 being the most important and 1 the least.
The chart below shows the average score for each.

1 = LEAST IMPORTANT   5 = MOST IMPORTANT

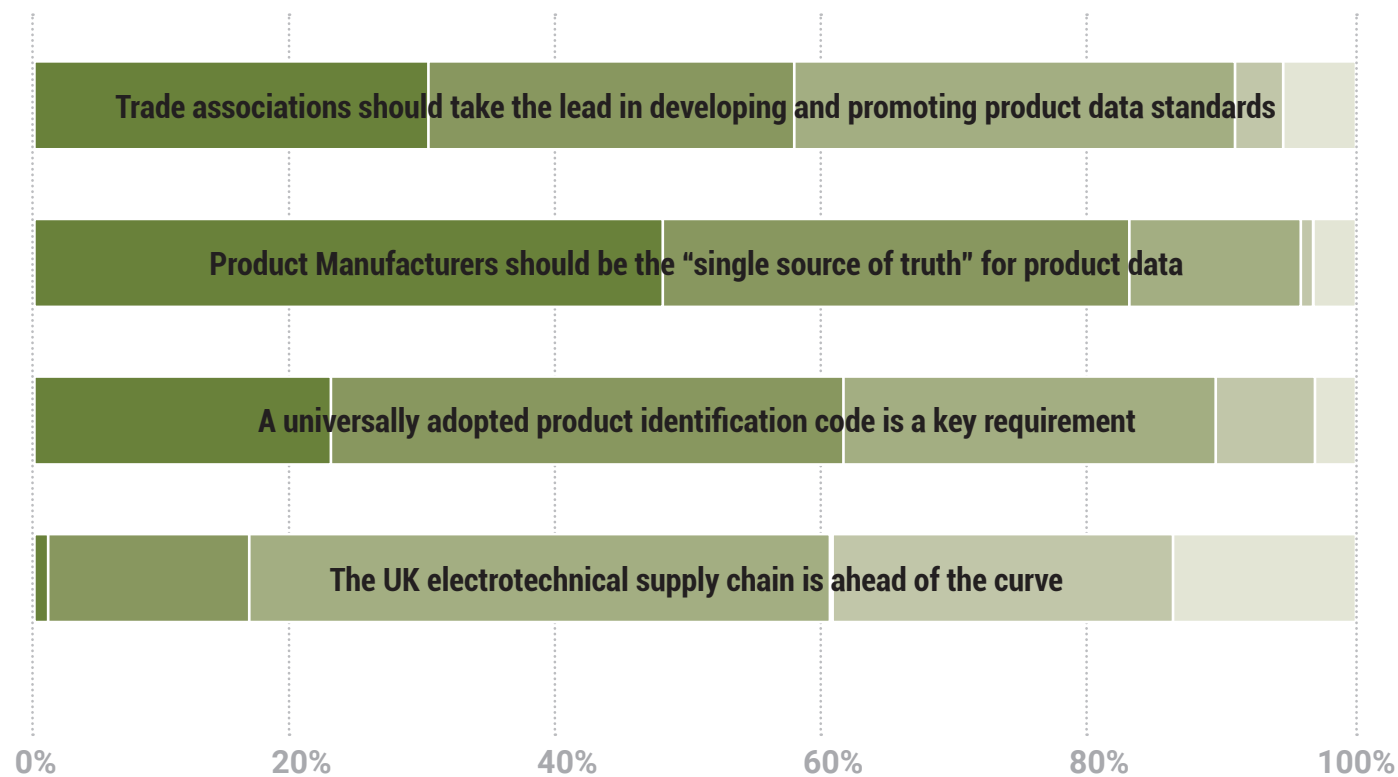| Obstacle	Score
Cultural change	2.95
Cost	2.91
Benefits not understood	2.83
Lack of know-how	2.77
Difficulty obtaining good quality product data	2.76
Lack of infrastructure to fulfil on-line orders	2.61
More pressing priorities	2.59
Lack of product data standards	2.57
Lack of interoperability between systems	2.55
Lack of customer demands	2.38
Market more focussed on BIM	1.88

COMMENT

- "Benefits not understood" and "Lack of know-how" may be more significant obstacles than indicated by the survey. For example, a number of Wholesalers commented that they didn't understand the questions sufficiently to complete the on-line survey. The survey results also showed that there is some confusion about the purpose, and difference between, PIM systems, data pools, data exchange formats etc.

- While anecdotal, this does highlight a need for the sector to up-skill in matters relating to digitalisation.

3.3 KEY ISSUES & TRENDS

The purpose of these questions is to understand electrical Wholesalers' and Manufacturers' opinion on key issues and market trends relevant to the supply chain as a whole.

Q Thinking about digitalisation in the electrotechnical sector as a whole, to what extent do you agree with the following statements?

Trade associations should take the lead in developing and promoting product data standards

Product Manufacturers should be the "single source of truth" for product data

A universally adopted product identification code is a key requirement

The UK electrotechnical supply chain is ahead of the curve

0%   20%   40%   60%   80%   100%

■ Strongly Agree   ■ Somewhat Agree   ■ Neither Agree nor Disagree   ■ Somewhat Disagree   ■ Strongly Disagree

Q **WHOLESALERS:**
What should trade associations do to take the lead in developing and promoting product data standards?

"There are different standards in place for different areas of the market so maybe these should be streamlined to give a bit more uniformity to the data provider."

"Engaging with suppliers and helping them so the data is fit to be shared. Until nearly all of it is there, none of it is any good. It needs to be a broad section of products and key players."

"We are terrible at removing products from the market. This is an area that needs to be looked at. When a product becomes obsolete, when do we tell people, how do we tell them, at what point in the product life cycle do we tell them? How do we tell them what the alternative products are? How do we give our end users the information they need to make an engineering migration to a subsequent product or recommended product? There needs to be some agreement across the industry on how product end of life should be handled and the mechanisms for communicating that needs to be consistent."

"I think things like ETIM are the way going forward."

"Educating people of the benefits, making it not such a scary prospect."

"I don't think it's their job to do that, it's up to the Manufacturer."

"I can't really fault the EDA in what they already do, maybe other trade associations within the industry don't do as much."

COMMENT

■ The point about removing products touches on an issue that will become more important with the increased focus on product traceability in the construction sectors. There is a fine balance between, on the one hand, the need to publicise specification changes and, on the other, avoiding onerous and unnecessary administration.

Put simply, at what point does a specification change become a new product?

■ This will have an impact on the use of product identifiers such as the GTIN in order to ensure that an individual product can be matched to the correct version of its technical specification.

Q **MANUFACTURERS:**
What should trade associations do to take the lead in developing and promoting product data standards?

" The work around ETIM is crucial in creating that industry standard and awareness. I also think associations should provide resources and support to Manufacturers and Wholesalers to embrace the digitalisation of the industry where possible."

" I think they are already trying to do that with ETIM. I don't want to sound negative, but we want to produce our own product information in a way that differentiates us from others. I think we can become digital without having the need for everything to be standardised."

" They should vet the standards that Manufacturers are using to ensure they are accurate, compliant and meet the relevant requirements. Maybe an upload tool so Manufacturers can put relevant certification and declarations of performance in an online area."

" think the EDA are doing a great job with the data pool, so they should continue with that. Perhaps there are elements that the ECA can get involved with as well."

" They need to work with the Manufacturers to ensure that the standards meet a minimum criteria for content and updates."

" I used to work for [national Wholesaler] and the ETIM standards have been in their business for a long time and work well. The EDA have done a good job trying to drive ETIM and that's a good start, they need to reinforce that."

Q **WHOLESALERS:**
What do you think is the best way to ensure that the integrity of product data is maintained as it passes from the Manufacturer to your organisation and then onto the Contractor and finally the client?

" It is up to the Manufacturer to own the data but there does need to be a feedback mechanism to relay back any inconsistencies or inaccuracies in the data."

" Maybe if there is one central place that holds the data, so everyone can access it and that the Manufacturers are invested into to ensure they keep on top of their data."

" Have a recognised standard for the data to ensure that it is up to date. We can ensure from our side that any product data is also up to date and accurate."

" I think you have to have a standardized process in place that we would customise ourselves but when a Manufacturer discontinues a product for example, we would get a notification or alert so we could change things at our end."

" If there is a large open source PIM system that everyone has access to throughout the supply chain, Manufacturer to end user (no pricing) that would probably work if everyone subscribed to it. The biggest issue would be getting everyone to subscribe to it."

" You would have to track any change. If you are taking information from someone else, I don't think you can ever afford to take it as read that it is right. Even some of the best people in our industry have come across things, whether it's a system glitch or an input error, something has been updated and what was right is clearly wrong, so you have to have validation checks in place to track for change."

Q **MANUFACTURERS:**

If product Manufacturers are to be the single source of truth for product data, how can you ensure that the integrity of the data is maintained as it passes from Manufacturer to Wholesaler to Contractor to client?

" The Manufacturers need to have due diligence in place and the processes and standards in place to ensure that the data can be relied upon, it's secure, can be transmitted as needed and can be that one source of truth ongoing down the stream."

" We find that a lot of the time the Wholesaler will tell the Contractor to go to the Manufacturer's website for the information. When we look at who has been downloading from our site, there are a lot of large Contractors who have been told by the Wholesaler to download direct from us. We just have to make sure our information is as up to date and accurate as it can be."

" I think that goes back to the PIM system that we are currently looking at starting to build, so that we control that data."

" You can have a number/unique identifier number. Other than that you just have to ensure that your data and website is the most up to date it can be so there's always a point to go back and check."

" Maybe a standardised database and audit trail is the main way to do that. Also that our data is up to date and accurate."

COMMENT

- The availability of accurate, standardised digital product data is key to digitalisation and the Construction industry as a whole still has a long way to go on this journey.

- Manufacturers bear the brunt of responsibility for the quality and availability of their own product data. However Wholesalers, Contractors and other stakeholders must recognise their responsibilities as curators of the data and take steps to maintain its integrity.

- It is important that the Electrotechnical supply chain (i.e. Wholesalers and Manufacturers) protects its own interests by taking a lead in agreeing standards for product data rather than risk having standards imposed upon it. There is widespread agreement that this activity should be led by the trade association(s).

3.4 FINAL COMMENTS

Our original plan was for this survey to be annual, but given the current speed of change there is probably little benefit in repeating a similar set of questions every year. Perhaps a three year cycle would be more appropriate.

However, there is much more that we could usefully learn. Digitalisation will transform the way the sector operates, and we need good information on which to base our decisions both as individual companies and as the sector as a whole.

Perhaps most importantly we need a more detailed understanding of customers' changing buying habits.

- What product information do they look for when specifying or sourcing products and where do they look for that information?

- What systems do they use and what is the role of the technology companies?

- To what extent do the product data needs of the supply chain overlap with those of other parts of the construction process?

- How will government and industry-led initiatives such as the Building Safety Act and net zero affect the need for product information and what impact will this have on Manufacturers and Wholesalers?

Clearly there is scope for more research, perhaps in collaboration with other trade bodies. As always, any suggestions from members and affiliates would be very welcome.

3.5 REFERENCES

For more information about the EDA's digitalisation initiatives and ETIM, please visit:

www.eda.org.uk

www.etim-uk.co.uk

www.etim-international.com

DIGITALISATION

SURVEY

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