

# **SLOVENSKI STANDARD**

## **SIST-TS CEN/TS 16555-2:2015**

**01-februar-2015**

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### **Upravljanje inovacij - 2. del: Upravljanje strateške inteligence**

Innovation management - Part 2: Strategic intelligence management

Innovationsmanagement - Strategische Markt- und Wettbewerbsbeobachtung

Management de l'innovation - Partie 2 : Management de l'intelligence stratégique

**Ta slovenski standard je istoveten z: CEN/TS 16555-2:2014**

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#### **ICS:**

03.100.40	Raziskave in razvoj	Research and development
03.100.50	Proizvodnja. Vodenje proizvodnje	Production. Production management

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**en,fr,de**

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TECHNICAL SPECIFICATION  
SPÉCIFICATION TECHNIQUE  
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**CEN/TS 16555-2**

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ICS 03.100.50; 03.100.40

English Version

**Innovation management - Part 2: Strategic intelligence  
management**

Management de l'innovation - Partie 2 : Management de  
l'intelligence stratégique

Innovationsmanagement - Teil 2: Management  
strategischer Erkenntnisse

This Technical Specification (CEN/TS) was approved by CEN on 27 October 2014 for provisional application.

The period of validity of this CEN/TS is limited initially to three years. After two years the members of CEN will be requested to submit their comments, particularly on the question whether the CEN/TS can be converted into a European Standard.

CEN members are required to announce the existence of this CEN/TS in the same way as for an EN and to make the CEN/TS available promptly at national level in an appropriate form. It is permissible to keep conflicting national standards in force (in parallel to the CEN/TS) until the final decision about the possible conversion of the CEN/TS into an EN is reached.

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EUROPEAN COMMITTEE FOR STANDARDIZATION  
COMITÉ EUROPÉEN DE NORMALISATION  
EUROPÄISCHES KOMITEE FÜR NORMUNG

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## Foreword

This document (CEN/TS 16555-2:2014) has been prepared by Technical Committee CEN/TC 389 “Innovation Management”, the secretariat of which is held by AENOR.

Attention is drawn to the possibility that some of the elements of this document may be the subject of patent rights. CEN [and/or CENELEC] shall not be held responsible for identifying any or all such patent rights.

This document is not intended for the purpose of certification.

The CEN/TS 16555 series consists of the following parts with the general title *Innovation management*:

- *Part 1: Innovation Management System*;
- *Part 2: Strategic intelligence management*;
- *Part 3: Innovation thinking*;
- *Part 4: Intellectual property management*;
- *Part 5: Collaboration management*;
- *Part 6: Creativity management*;
- *Part 7: Innovation management assessment*.

Part 7 is in preparation.

According to the CEN-CENELEC Internal Regulations, the national standards organizations of the following countries are bound to announce this Technical Specification: Austria, Belgium, Bulgaria, Croatia, Cyprus, Czech Republic, Denmark, Estonia, Finland, Former Yugoslav Republic of Macedonia, France, Germany, Greece, Hungary, Iceland, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, Netherlands, Norway, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Sweden, Switzerland, Turkey and the United Kingdom.

## Introduction

Strategic Intelligence (SI) plays a key role in innovation management as it contributes to the articulation of the vision and strategy of the organization. For example, as described in CEN/TS 16555-1, SI provides intelligence and foresight on economic, technological, scientific, regulatory, legal, financial, commercial, competitive, customer, social and environmental issues and topics, relevant to the organization, when launching an innovation strategy or project.

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## 1 Scope

This Technical Specification applies to the structuring and management of a strategic intelligence system intended to inform decisions in the planning and the deployment of innovation.

This Technical Specification defines:

- the various terms relating to strategic intelligence and its management;
- the key tasks in the strategic intelligence system;
- the strategic intelligence system process (management, implementation and support).

This Technical Specification does not concern:

- information validation and data protection;
- the decision-making process.

## 2 Normative references

Not applicable.

## 3 Terms and definitions

For the purposes of this document, the following terms and definitions apply.

### 3.1

#### information

significant data

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### 3.2

#### information system

structured set of resources and processes enabling the collection, storage, structuring, processing, transfer and dissemination of data in text, image, sound or coded data format within an organization

### 3.3

#### strategy

organization's overall objectives and plan of development, describing the effective use of resources in support of the organization in its future activities which reflects its vision

### 3.4

#### strategic information

information that contains elements likely to contribute to defining, altering or questioning an organization's strategy

### 3.5

#### strategic intelligence

SI

outcome of the analysis of the strategic information to be used to inform and to organize the strategy of the organization (for example: forward-planning, positioning, influence or protection)

### 3.6

#### strategic intelligence system

SIS

processes and structures to generate the strategic intelligence

### 3.7

#### watch

continuous and mainly iterative activity aimed at actively monitoring the technological, commercial, regulatory and legal, standards, socio-economic, and competitive environment, in order to anticipate changes and risks, as well as to identify opportunities

## 4 The strategic intelligence system

### 4.1 General process

The organization should implement a strategic intelligence system process to obtain relevant information for analysis and deliver strategic intelligence needed. Each step of the SIS process is depicted in Figure 1 and described in the following subclauses. Areas to be addressed are: the definition of key intelligence topics (needs), the identification of relevant sources, the interpretation and valorisation step, and the diffusion of intelligence to the top management.

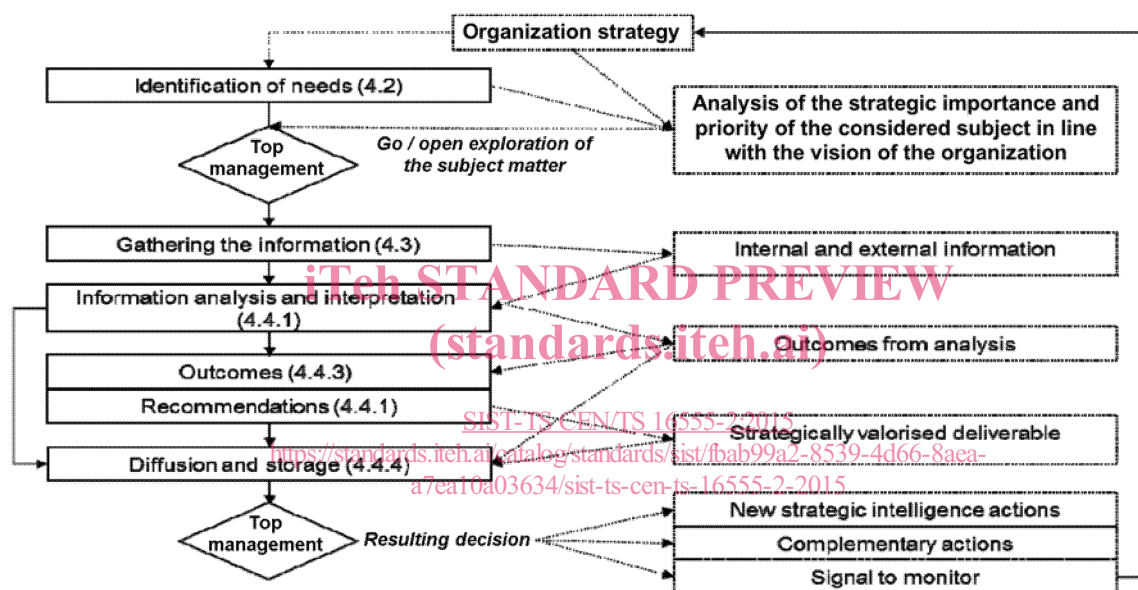


Figure 1 — Flow of information and processes involved in the performance of the strategic intelligence system and results to be obtained

### 4.2 Identification of strategic intelligence needs

The strategic intelligence needs of an organization in the context of innovation depend on the identification of the relevant information in its business environment and industry (for example: market, competitors, technical, stakeholders).

The organization should also identify internal information relevant to innovation management.

The organization should be aware that the business environment is dynamic and continually changing.

The organization should establish a process for the identification of needs, which should consider the following as a minimum:

- business areas of the innovation projects identified;
- competitors;
- markets;



- d) intellectual property and intellectual property rights;
- e) standards;
- f) technology;
- g) regulatory issues.

For more information see CEN/TS 16555–1.

### 4.3 Gathering the information

According to the previously defined strategic intelligence needs, sources of information and resources should be identified, based on the criteria of good quality, objectivity and reliability, such as:

- classified information: information of which the level of sensitivity has been quantified, according to a scale pre-established by an organization;
- inside information: any information concerning a company or market, sufficiently specific in content, with a high chance of materializing but as yet unknown to the general public;
- sensitive information: any information, regardless of the medium (oral, written, electronic), of which the disclosure, loss or unavailability is likely to have negative consequences for the organization;
- critical information: information likely to alter an organization's strategy.

This may be obtained from:

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- a) Internal sources, such as:

- 1) the organization's own documentation;
- 2) persons with knowledge or experience related to the strategic intelligence needs;
- 3) results of available forward-looking analyses, such as forecasting, foresight exercises, drafting of scenarios, road maps, etc.;

- b) External sources, such as:

- 1) customers, suppliers or subcontractors;
- 2) competitor activities;
- 3) documentation sources the organization can access: hard copies (magazines, catalogues, etc.), electronic support (databases etc.) or information resources on the internet (specialized portals, news, blogs and social networks, etc.). This includes technical documentation such as regulations, specifications, databases of patents and others intellectual property rights, and standards;
- 4) publicly available research papers;
- 5) congresses, seminars, fairs or exhibitions;
- 6) market analysis reports.

According to the defined strategic intelligence needs, the organization should ensure that the quantity and quality of the information is validated as being appropriate to satisfy the required objectives. This should be

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approved by top management, prior to initiating the subsequent process of acquiring and analysing the information.

The nature of the information required is dependent on the size of the organization, its industry and its culture.

Information quality can be assessed by considering the following:

- c) reliability and accuracy of the information (for example the origins of information);
- d) assessment of the value added by the various activities and consequences on the incoming and outgoing information for these activities;
- e) completeness of the information. Identify gaps in key information and implement solutions that include, if needed, further information;
- f) if possible, establish a table of functions / activities / information and map information flows;
- g) for the main activities, evaluate the usefulness and completeness of incoming information by reviewing with the person specifying the objectives of the SI project.

#### **4.4 Information analysis and valuation**

##### **4.4.1 Information analysis and interpretation**

The organization should proceed with the qualitative and quantitative analysis of the data in line with the strategic intelligence requirements.

The information analysis may involve a range of different skills such as technical, legal, intellectual property or economics.

The information analysis may include aspects such as:

- integration of data from different sources in order to achieve synergies, in which the combination of information from the different sources constitutes a whole with a greater relevance and scope than the individual pieces of information;
- interpretation of the information, with the objective of determining what is valid and what is relevant for decision making including, for example, the understanding of the analysed information or a forecast of its consequences and foreseeable evolution;
- establishing the meaning of the information which has been analysed, for example, concerning the technical content and the market/commercial relevance, and of their likely consequences for the organization;
- recommendations for action.

**NOTE** Any decisions are made by the requester of the strategic intelligence (top management).

The information analysis may be carried out regularly or in response to specific situations.

##### **4.4.2 Analysis methods and tools**

Before processing information, the organization should define the vocabulary specific to their area of business activity in order to share a common vision and language.

The organization may use different analysis techniques as appropriate - human-based, automated or both in combination.

## NOTE

- a) Some common human based tools used to analyse strategic information include for example:
  - 1) SWOT (with respect to strengths, weaknesses, opportunities and threats).
  - 2) PESTEL (with respect to political, economic, technological, environmental and legal factors).
  - 3) Porter's Five Forces (with respect to competitive forces and actors, new entrants, competitors, customers, suppliers).
- b) Some common automated tools, which can deal with large amounts of data or documents, structured or not, can be used to reveal patterns and trends, and/or to provide a visual representation, such as:
  - 1) statistic tools or software.
  - 2) data mining.
  - 3) mapping and visualization tools.
  - 4) classification.
  - 5) taxonomy.
  - 6) lexical or semantic analysis.

**4.4.3 Outcomes of the strategic intelligence system**

The outcome of the strategic intelligence system is a value-added analysis and interpretation to support and inform strategic vision and strategic decision making, either for the organization's strategy or for a specific innovation project as a whole.

The actions derived from the results of the strategic intelligence system may be categorized as:

- a) forward planning: proposals for actions in response to changes, or expectations of changes in the analysed environment.
- b) reaction to opportunities: proposals for actions to exploit these identified opportunities.
- c) reduction of risks: proposals for actions to reduce these.
- d) making improvements: proposals for the necessary actions to address limitations, inefficiencies or to minimize identified weaknesses.
- e) innovation: proposals for new ideas and/or research, development and innovation projects.
- f) cooperation: identification of potential collaborators.
- g) evaluation of technology and/or market options.
- h) impacts and interactions among technologies, products and processes.
- i) regular monitoring to provide early identification of new technology or market opportunities for the organization, or provide justification for abandoning those with low potential.

**4.4.4 Storage and future use of outcomes**

The information and strategic intelligence obtained during the above described process has commercial value both for future reference and as a learning resource for the organization.