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SELF-ASSESSMENT OF THE COMPANY INNOVATION MANAGEMENT SYSTEM

Introduction. *The innovation component has been embedded in the activities and developments of most companies and research–educational institutions, which has necessitated the establishment of formal management procedures and the availability of tools for their implementation.*

Problem Statement. *The Technical Committee ISO/TC 279 Innovation Management has developed the ISO 56000 series of standards to guide the implementation of innovation management systems within companies. While these standards have provided a general framework, they have not proposed a practical mechanism for evaluating such systems.*

Purpose. *This study has sought to summarize the key factors for evaluating innovation management systems in accordance with the ISO 56000 series of standards and to develop a questionnaire enabling companies of different ownership types to conduct a self-assessment of implementation.*

Materials and Methods. *The study has employed a combination of analytical methods, surveys, expert evaluation, case studies, and SWOT analysis, which have made it possible to assess the degree of innovation management implementation across organizations of varying types. The research materials have included ISO standards, self-assessment forms, enterprise analytical reports, survey data, and practical examples of innovation system applications.*

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Results. This study has summarized the structure and objectives of the ISO 56000 series of standards and identified the factors influencing the effectiveness of corporate innovation management systems. On the basis of analytical methods, a questionnaire has been developed to facilitate the evaluation of innovation management systems. This tool has enabled companies to select appropriate strategies for determining the maturity level of such systems and to enhance competitiveness. Case studies have demonstrated how both commercial enterprises and public-sector organizations have applied the self-assessment, which has allowed them to identify previously overlooked factors. Furthermore, the research has highlighted distinctive features of innovation management systems across different organizational types.

Conclusions. The self-assessment of innovation management systems has proven to be a valuable instrument for improving organizational performance and achieving strategic objectives, irrespective of ownership structure or institutional mission.

Keywords: innovation management system, innovation management, evaluation, standard, monitoring, improvement.

The company's competitiveness, increase in profit and improvement of its place in the local and global markets depend on the ability to generate new solutions and a new product. The presence of these criteria depends on many factors, but, in general, it is determined by the presence of the company's innovation policy, its level and the ability to influence it. There is no doubt about the availability at a successful company of technological process management systems, production quality, etc. The innovation management system should be a similar process in today's market saturation environment, as nowadays the issue of regulating the emergence of innovations at enterprises is becoming more and more important according with very rapid technological progress.

Many specialists have dealt with issues of innovation management. This is evidenced by the research cited in [1], where the authors analyzed publications in peer-reviewed journals during 2006–2020 regarding innovation management. They analyzed about 70 publications and concluded that the issue of innovation management remains relevant and requires a standardized approach. In work [2], the authors carried out even deeper research on the relevance of this issue over the past fifty years. They reviewed the evolution of this issue in three stages of development of research in this field, and note an increase in the number of publications with each period and a shift in emphasis to the consideration of the problem by stimulating the creators of innovations to manage this process.

A number of experts also dealt with issues of evaluation of the innovation management system. The results of the study [3] show that the success

of the self-certification program largely depends on the company's ability to effectively manage its processes. An important factor is also the development of internal motivation of the staff and strong support from the top management during the implementation of the system. In the conclusions of the study, it is noted that voluntary certification has a positive effect on the innovative activity of the company and its marketing effectiveness.

Researchers from Brazil [4] presented a conceptual model for measuring and evaluating the sustainability-oriented innovative potential and efficiency of organizations. The model was based on the principles of multidimensionality, target orientation of interested parties, analysis of interdependence and feedback loop, orientation on the innovation process.

In recent years, the issue of innovation management has received considerable attention in the world. Specialists from different countries have developed and continue to develop a number of ISO standards aimed at identifying and managing innovations in the company. The ISO 56000 series was developed by the ISO Technical Committee — TC 279 "Innovation Management."

TC 201 "Management of innovations" was created in the National Technical University of Ukraine "Igor Sikorsky Kyiv Polytechnic Institute" in Ukraine in 2022.

The purpose of the article is to summarize the factors recommended for evaluating the innovation management system for a business entity in accordance with the ISO 56000 series of standards and to form a self-assessment methodology suitable for use by companies of different types of ownership.

The authors offer the solution to the urgent issue of determining a company’s innovation management system and assessing its implementation and impact on the quality of enterprise development.

The innovation management system (IMS) is a strategic approach to the creation, development and implementation of new ideas, products, processes or services in the organization in order to increase its competitiveness and ensure sustainable growth of a company. It helps organizations and universities adapt to changes in the business environment and increase their competitiveness, contributing to the creation of value for customers and increasing profits.

Specialists from different countries have developed and continue to develop a number of ISO standards aimed at identifying and managing innovations in the company. The series of ISO 56000 [5] was worked out by the technical committee of ISO – TC 279 “Innovative management.”

According to ISO 56000:

- ◆ *Innovation* – new or changed entity (anything perceivable or conceivable), realizing or redistributing value, (gains from satisfying needs and expectations, in relation to the resources used).

- ◆ *Management system (MS)* – a set of interrelated or interacting elements of an organization to establish strategies, policies and objectives and processes to achieve those objectives.
- ◆ *Innovation management system (IMS)* – management with regard to innovation.

The classification of innovations by their effectiveness [6] shown in Table 1 allows us to understand different types of innovations and their hierarchy.

Management at every stage of the innovative process has a practical sense for business and helps to create a real creative incubator where new ideas can be developed. Table 2 shows the series of ISO 56000 in a schematic form, which helps systematize all existing standards in ISO TC 279.

The standard ISO 56005:2020 under development aims to address the following issues (see Fig. 1): creating an IP strategy, establishing systematic IP management within the innovation processes and applying consistent IP tools and methods in support of efficient IP management [6].

ISO/AWI 56011 “Competency framework for innovation management” provides a reference and guidance for interested parties outlining the skills, behaviors, and competencies required to

Table 1. Classification of Innovations According to Their Effectiveness

Innovation type	The essence of innovation	Inventive level of innovation
Radical / breakthrough / discontinuous / disruptive / revolutionary	Extinction of existing markets, radically new products or services	An absolute world novelty
Transformational / architectural / manufacturing	Use of new technology implying a principal abandonment of conventional production systems and creation of new relations, customers, and markets	Fundamental differences in the principle of operation of a new object of an already known purpose
Sustaining or performance-innovation / improving	Replacement of old products with more advanced versions	Significant differences in the principle of operation of objects
Incremental / regular / modification	Insignificant changes in the existing range of products, technology, and systems of management in order to improve them	Differences at the level of object nodes
Pseudo-innovations	Implemented to meet requirements of product customers, neither significantly improve the product quality, nor modify the process to improve obsolete technology	Differences at the level of individual elements

Source: [6].

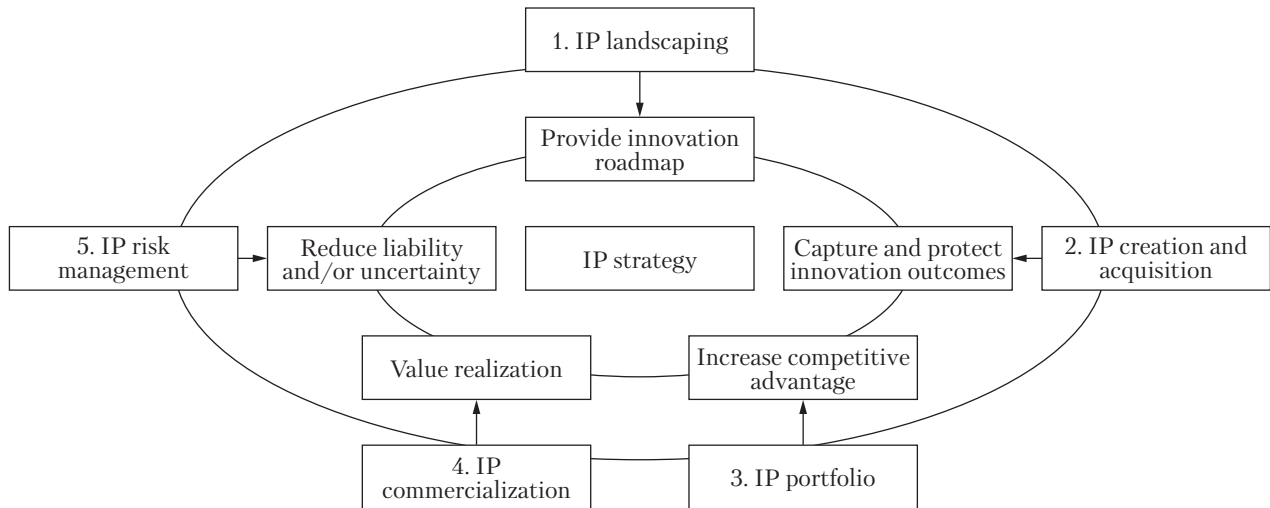


Fig. 1. Scheme of IP management within the framework of innovation processes [6]

support the effective management of innovation activities, including the establishment, implementation, maintenance, and continual improvement of an innovation management system for use in all types of organizations.

To obtain the maximum effect from the application of innovations at the enterprise, it is necessary to evaluate and classify them. The innovation management system presented in the article can be more effective if the innovations implemented at the enterprise are ranked. For Radical, Transformational and Sustaining or Performance-innovation innovations that change the production or company paradigm, the application of innovation management is a priority, as the implementation of such innovations carries more risks. Companies shall assess possible losses and develop risk minimization plans provided for in the proposed self-assessment methodology. The created IMS of ISO 56000 determines the factors affecting the IMS in different types of enterprises but does not allow for the evaluation of this system in a quantitative form.

The purpose of the article was to establish the main factors that determine the strategic vectors of the IMS and consider the internal and external operating environment of the organization, so that the system remains relevant and provides cons-

tant value, and to develop a methodology for assessing the state of the IMS for the company.

Such an analysis should help to evaluate the management system of innovative activities at the company. Therefore, a questionnaire has been developed — Table 3 [8, 10, 16], which allows any enterprise to conduct such a survey and choose the necessary strategies to solve the issues with a certain IMS aspect. Table 3 shows an example of such assessment for one of the organizations.

The system is designed to be evaluated by a manager (leader) in order to help assess the situation in the company and provide for constant active control and its correction. Also, the questionnaire provides the possibility of attracting experts for large companies for expert evaluation, which helps reduce the error of the obtained results.

The proposed methodology involves assessing the level of factors that determine, in accordance with IMS standards, the condition of the system at an enterprise. Eight main criteria have been identified, each including between four and ten questions. Each question is evaluated on a 4-point scale, ranging from zero (Absent) to three points (Excellent). Next, the total number of points (*Total points*) is determined for all eight factors. Based on the maximum value for each criterion Q_{max_i} , Q_{fact_i} is calculated as the ratio of *Total points* to

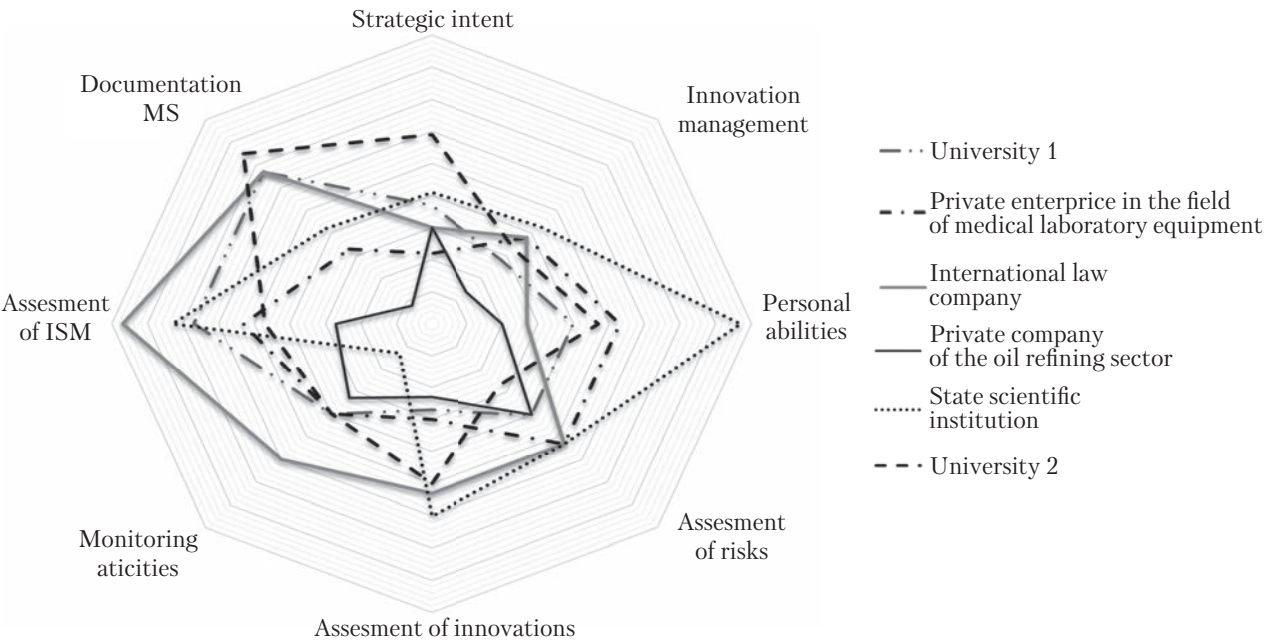


Fig. 2. ISM rating of companies based on various company factors

Q_{\max_i} . The overall score for the questionnaire is determined using the formula:

$$\text{Total } Q\% = (\sum Q_{fact_i}) / \sum Q_{\max_i} \cdot 100.$$

The resulting total value determines the IMS company evaluation, as presented in Table 4.

Data analysis was carried out according to the number of points obtained by the organization –

Table 2. Structure of the Series of Standards ISO 56000

The series of						
Number of standard	ISO 56000:2020	Innovation management system				
		ISO 56001:2024	ISO 56002:2019	ISO 56003:2019	ISO/TR 56004:2019	
Title of standard	Innovation management – Fundamentals and vocabulary	Requirements	Guidance	Tools and methods for innovation partnerships	Innovation Management Assessment	
Scope of application	The vocabulary, fundamental concepts and principles of innovation management [6]	The requirements for implementing and continually improving a management system for innovation efforts [7]	Guidance for the development, implementation and maintenance of an innovation management system [8]	Describes the innovation partnership framework [9]	Guidance for organizations to plan, implement and follow-up on an innovation management assessment [10]	

Source: compiled by the authors based on [7–16].

Table 4, but this distribution is conditional. The head of the company should make a decision regarding areas that need improvements for the general state of the IMS or its separate parts.

The authors conducted a survey of enterprises of different forms of ownership, universities in different cities of Ukraine (see Figs. 2, 3).

It was found that ISM for a private enterprise is practically non-existent, and if necessary, it should be developed and implemented according to ISO 56000. For other companies, it is not at a sufficient level for the required functioning and can be assessed as inadequate. We can see from Fig. 2 that different companies should pay attention to different factors that are rated as bad. Almost all companies have a very low level of Policy and Strategy of ISM, Innovation Management. The assessment of innovations and risks from their implementation is at a low level. However, there are certain factors at a satisfactory level.

That is, with the help of the proposed assessment, enterprises will be able to conduct their own analysis of their ISM and draw attention to those factors that are practically absent or have a low level.

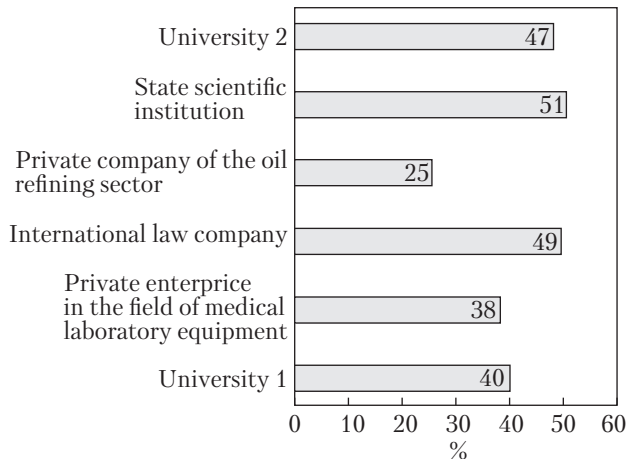


Fig. 3. Assessment of ISM for different companies

The innovation management system can be implemented in different types of organizations, although there may be some differences in the approaches and features allowing us to gain advantages from it depending on the organization type. For example, we consider commercial and governmental structures (Table 5).

Despite these differences, different types of organizations can benefit from an innovation mana-

ISO 56000						
Innovation management — Guidance				Innovation management — examples		
ISO 56005:2020	ISO 56006:2021	ISO 56007:2023	ISO 56008:2004	ISO/WD TR 56009	ISO/TS 56010:2023	
Tools and methods for intellectual property management	Tools and methods for strategic intelligence management	Tools and methods for managing opportunities and ideas	Tools and methods for innovation operation measurements	Example implementations of Innovation Operation Measurements	Illustrative examples of ISO 56000	
Recommendations and strategies, helping organizations to protect and maximize the best ideas [11]	Guidelines for supporting strategic intelligence within creating, establishing and applying of innovation [12] management	Guidelines to realize value from their opportunities and ideas at strategic and operational levels [13]	Guidance for the definition, implementation, evaluation, and improvement of the measurements necessary to effectively manage innovation activities [14]		Provides descriptions, context, and examples for selected concepts of innovation management defined in ISO 56000 [15]	

Table 3. The Evaluation System for a Company's IMS

No.	Questionnaire question	Assessment (number of points)				
		Ab-sent	Bad	Satis-fac-tory	Ex-cel-lent	Total points
		0	1	2	3	
1	Do the Strategic intent and scope of IMS at the company include the Key points: 1) the strategy of IMS in the company based on the presence of goals, innovation culture, portfolio management; 2) the company's ability and willingness to change; 3) the resources needed (internal and/or external) for IMS; 4) the constant monitoring and improvements of IMS; 5) the system for encouraging and training staff; 6) the intellectual property management system; 7) the system for forecasting the development of innovation during its lifecycle; 8) the automated system of data storage, analysis and processing; 9) the system for introducing business support into the organization process of IMS Total points according to criterion 1	0	1	2		11
2	Does innovation management include the following: 1) the Management of Assessment of innovation and strategic forecasting; 2) the Management of the ability to generate new solutions; 3) the possibility of assessing risks and carrying out corrective actions; 4) taking into account the open innovation (access to its intellectual pool to others); 5) the Team's Brainstormed solution or other methods, leading to innovation; 6) the Management of Checking the effectiveness of corrective actions (improvements) to expected results; 7) the Team of external experts for monitoring of IMS Total points according to criterion 2	0	1	2		9
3	Does the company's personnel possess the following abilities: 1) to generate, summarize and formulate ideas; 2) to work in groups, to apply methods of creating IP rights; 3) to generate new solutions; 4) to be able to analyze and forecast the possibility of implantation of innovation at the company; 5) to know the strategy of the company's development, internal and external markets Total points according to criterion 3	0	1	2		13
4	What are the strategic criteria used to assess innovation: 1) assessment of strategic and management risks; 2) assessment of technological risks; 3) assessment of availability of resources; 4) criteria for carrying out corrective actions; 5) determination of uncertainties for each criterion Total points according to criterion 4	0	1	2		8
5	What are the factors considered for assessing and forecasting innovation: 1) priority of the innovation direction; 2) consequences for the intellectual company case;		1	2		18

End of Table 3

No.	Questionnaire question	Assessment (number of points)				
		Ab-sent	Bad	Satis-fac-tory	Ex-cel-lent	Total points
		0	1	2	3	
	3) using proven concepts; 4) the possibility of realizing expectations from the implementation of innovation; 5) time of innovation implementation; 6) time of return on investment; 7) existence of stakeholders and the possibility of cooperation with them; 8) the possibility of selling a license of a possible IPR; 9) resource and technological feasibility of innovation implementation; 10) identifying risks and uncertainties of such innovation implementation Total points according to criterion 5	0		2	3	
6	What are the factors considered for monitoring activities: 1) study of monitoring results; 2) responsibility for the use of continuous improvement activities to ensure the IM and the <i>IMS</i> further development; 3) reliability of long-term direction of improvement activities and systemic approach; 4) combinability of different types of management mechanisms; 5) determination of the degree of achievement of performance metrics for the innovation Total points according to criterion 6	0	1			2
7	Implementation of the management improvement system factors: 1) defining the need for improvement; 2) defining the calculation of the expected output and contribution to enhance the performance; 3) finding sufficient resources of innovation implementation and personal responsibilities; 4) defining timelines of improvement (short, mid or long-term); 5) implementation activities for further improvement IM's effectiveness and efficiency Total points according to criterion 7	0	1	2	3	11
8	Implementation of the documentation management system factors: 1) collection of quantitative and qualitative data; 2) interpretation of data and identify gaps in IM and <i>IMS</i> ; 3) structure of <i>IMS</i> report data and the procedure for exchanging data; 4) identification of IM improvement roadmap and implement roadmap action. Total points according to criterion 8	0	1		3	5
	Total number of points received by the company, Q , %					

Note: Q_i – the ratio of the total number of points for one criterion (Q_{\max_i}) to the actual number of points for that criterion received by the company for this criterion, multiplied by 100%; $Q_{\%}$ – the ratio of the maximum possible number of points (150) to the actual number of points received by the company, multiplied by 100%.

Table 4. Evaluation of Company's IMS

Number of points	Q, %	IMS compliance level	Recommendations
150–120	100–80	Excellent	The system works
119–80	79–53	Satisfactory	There are certain problems that can be adjusted according to the questions with 0–1 point answers
79–40	52–27	Bad	It is necessary to restore the system, revise the policy and strategy
39–0	26–0	Absent	The system is practically non-existent

Table 5. Potential Impact and Effect on Companies Due to the Use of the Innovation Management System

Criteria of the innovation management system	Potential impact	Potential effect	
		Governmental organization	Private enterprise
Criterion 1 – the IMS strategy in the company based on the presence of goals, innovation culture, portfolio	Innovative culture	Opens exchange of ideas, support for research and development of creative skills to stimulate and support innovative initiatives in education, research and technology	Gives the availability of research and development, ensuring the growth of scientific potential and increasing the effectiveness of development
	Innovation strategy	Structures and accelerates the process of creating new ones, improves their activity and increases socio-economic impact	
Criterion 2 – strategic forecasting and assessing risks	Research and development support	Provides the necessary resources that can be used for research and development of new products, technologies or services	Creates and implements new products and technologies, gives the opportunities for green transition, reduction of production costs
Criterion 3 – management of the creative abilities of the company's personnel	Organization of innovative competitions and programs	Allows for the development of innovative projects among researchers, students and teachers	Identifies potential commercial opportunities for research results, as well as determines how these opportunities can be used to create innovative products or services, attract better employees
Criterion 4 – evaluation of criteria assessment	A flexible and effective system of influencing the direction of the innovation strategy	Avoids inappropriate reporting and data collection, costs for administrative staff of the company or institution, acquisition of rights to intellectual property objects for ineffective solutions	
Criterion 5 – assessment of innovation implementation	Protection of intellectual property	Creates opportunities to create joint ventures, transfer rights to technologies and receive royalties	Helps identify potential conflicts, allows protecting rights; the possibility of obtaining additional profits through the transfer of rights to technologies
	Technology transfer	Provides mechanisms for the transfer of intellectual property rights to startups or industries to commercialize research, obtaining additional profit	

End of Table 5

Criteria of the innovation management system	Potential impact	Potential effect	
		Governmental organization	Private enterprise
Criterion 6 — assessment of monitoring and collaboration opportunities	Evaluation and monitoring of innovative projects	Provides the possibility of performing complex research by representatives of various research groups in the organization, which expands access to grant programs	Avoids the costs of launching an irrelevant product into production, determine the effectiveness of research programs, redistributing funds
	Development of scientific collaborations	Contributes to the exchange of knowledge and resources, the creation of cross-industry innovations, the emergence of strategically important state programs, and the development of entrepreneurial creativity	Uses the capabilities of state scientific institutions to solve their own tasks, avoid R&D costs, obtain state orders, promote the development of creativity and entrepreneurship
	Cooperation with businesses and universities	Interacts with business, the public and non-governmental organizations for the integration of innovations into society, given the opportunity to check the implementation of research results in the real sector of the economy	Creates mechanisms for attracting and retaining talented specialists who have skills in creating innovations, reduce personnel training costs
Criterion 7 — assessment of management improvement opportunities	Development of resources for innovation	Accelerates the implementation of research programs and the involvement of talented young people in innovative activities, the possibility of using open data	Ensures efficient use of resources, avoidance of obsolescence of products and technologies
	Management of innovation projects	Facilitates creation and development of innovative startups, science parks and joint ventures based on scientific research	Increases competitiveness, expands the range of products
Criterion 8 — evaluation of the document flow and reporting system	Data management	Facilitates quick access to data, the possibility of using them for forecasting and modeling of processes	Facilitates clear control over all business processes, the ability to receive up-to-date data on the status of projects, avoidance of inefficient decisions, risk reduction
		Facilitates quick access to information stimulates the exchange of ideas and cooperation between different departments, that can lead to non-trivial solutions to problems	

gement system by adapting it to their specific needs and goals. Innovation management can help improve an organization's performance and achieve its strategic goals, regardless of its ownership or tasks.

Creating a new product requires long and consistent work to bring that product to commercial use. An effective algorithm of actions to manage the creative innovation process is required. Based

on the analysis of the system of innovation management standards, the authors proposed a method of self-assessment of the IMS. The main factors regarding the direction of IMS, which consider the internal and external operating environment of the organization, are determined. The use of

the technique is simple and it does not require special requirements for its application. According to the results of the assessment, it is possible to ensure the stability of the management system, its relevance and the possibility of correction actions of IMS.

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САМООЦІНКА СИСТЕМИ УПРАВЛІННЯ ІННОВАЦІЯМИ НА ПІДПРИЄМСТВІ

Вступ. Інноваційна складова присутня у діяльності та розробках більшості компаній і навчально-наукових організацій. Вона вимагає процедури управління цими процесами та наявності інструментів для її реалізації.

Проблематика. Технічним комітетом *ISO/TC 279* «Управління інноваціями» розроблено серію стандартів для впровадження систем управління інноваціями. Вони містять загальний підхід, але практичного механізму реалізації оцінювання таких систем розробниками не запропоновано.

Мета. Узагальнення факторів для оцінювання системи управління інноваціями відповідно до серії стандартів *ISO 56000* для будь-якого суб'єкта господарювання та розробка анкети з метою її самооцінювання для впровадження компаніями різного типу власності.

Матеріали й методи. Використано методи аналітичного аналізу, анкетування, експертного оцінювання, кейс-стаді та *SWOT*-аналізу, що дозволяє оцінити рівень впровадження інноваційного менеджменту в організаціях різного типу. Матеріалами дослідження слугували стандарти *ISO*, форми самооцінки, аналітичні звіти підприємств, дані опитувань та приклади практичного застосування інноваційних систем.

Результати. Узагальнено структуру, завдання серії стандартів *ISO 56000*, фактори, що впливають на систему управління інноваціями на підприємствах. За допомогою аналітичного методу запропоновано анкету для оцінки системи управління інноваційною діяльністю. Це дозволяє компаніям обирати правильні стратегії для визначення рівня впровадження такої системи, щоб залишатися конкурентоспроможними. Наведено приклади такої оцінки різними суб'єктами господарської діяльності, зокрема комерційними структурами та державними організаціями, що надало їм можливість звернути увагу на практично відсутні фактори. Показано особливості системи управління інноваційною діяльністю для різних типів організацій.

Висновки. Проведення самооцінювання може сприяти покращенню роботи організації та досягненню поставлених стратегічних цілей, незалежно від її форми власності чи завдань.

Ключові слова: система управління інноваціями, інноваційний менеджмент, оцінювання, стандарт, моніторинг, поліпшення.