SUMMARY REPORT

SURVEY ON BUSINESS MODEL INNOVATION AND DIGITAL MATURITY

CEN CENELEC

EXECUTIVE SUMMARY

This report presents a consolidated summary of the survey conducted among the CEN and CENELEC Membership on Business Model Innovation (BMI) and Digital Maturity, launched in April 2025.

With a **98% response rate**, the findings provide a representative overview of the status quo, while allowing us to identify emerging patterns and strategic challenges faced by Members as they navigate the ongoing transformation from product-based to service-centered business models.

Key takeaways include a **widespread reliance on traditional revenue streams** such as single sales and public funding. Members recognize the limited future viability of these business models, however, and the vast majority are introducing innovative business models already, or plan to do so in two to five years' time.

Overall, the CEN and CENELEC Members express **strong ambitions** to advance both business model innovation and digital transformation. This ambition is hampered, however, by persistent **challenges**, including limited financial and human resources, especially in-house digital expertise, insufficient insight into user needs and market dynamics, and a widely felt need for a coherent strategic vision and a clearer delineation of the different roles and responsibilities within the future CEN and CENELEC system, as we embark on a transition to servitize our offerings.

SUMMARY

METHODOLOGICAL NOTE

The survey achieved a **98% response rate**, with 43 out of 44 Members participating. It assessed both qualitative and quantitative dimensions of BMI and digital maturity, including revenue structures, business model dependencies, the adoption of digital tools, and perceptions of disruptive trends and future preparedness.

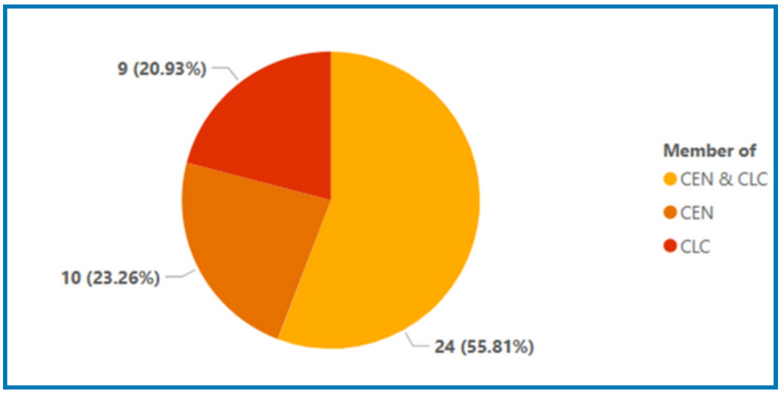
Responses have been anonymized and aggregated to identify trends across different Member types. Where relevant, this includes distinctions by organization size, association (CEN/CENELEC), and statutes (public/private).

MEMBERSHIP PROFILE

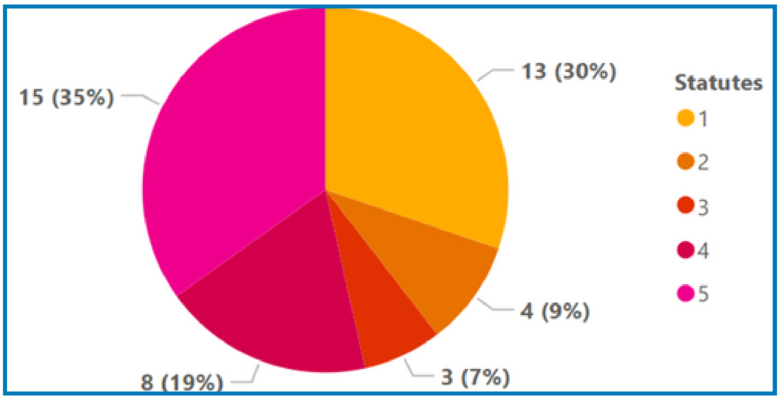
The surveyed Membership of CEN and CENELEC reflects a diverse community:

- 43% qualify as micro (<10 staff) or small (<50 staff) organizations.
- Less than 40% are entirely or primarily public; a significant proportion are either fully private (35%) or fully public (30%).
- 70% report annual revenues under EUR 10 million, with 37% generating less than EUR 2 million annually.
- 55% are dual Members of both CEN and CENELEC.

1. **Number of Organizations per Association**



2. Number of Organizations per Statute

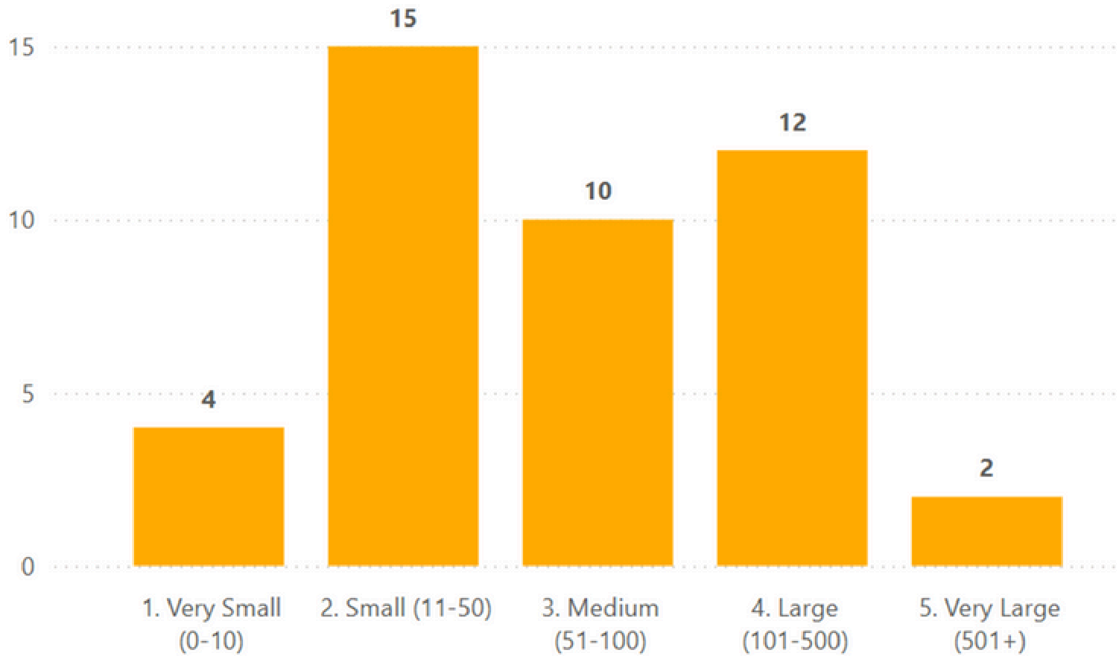


The **diversity of statutes and sizes** indicates that any transformation strategy for the Associations will need to accommodate a diverse range of operational realities.

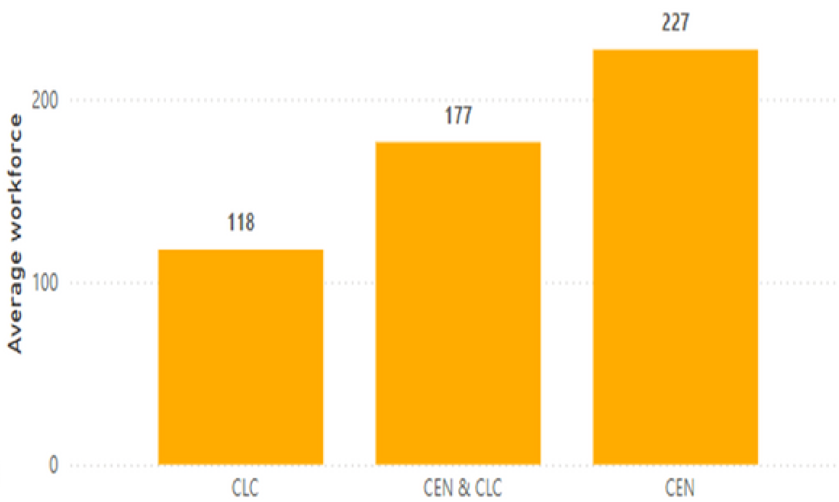
Overall, the Membership is predominantly private or mostly private, mid- to large size, and generates over EUR. 2 million in annual revenue, which bodes well for the system's **collective capacity to transform.**

MEMBERSHIP BY ORGANIZATION SIZE

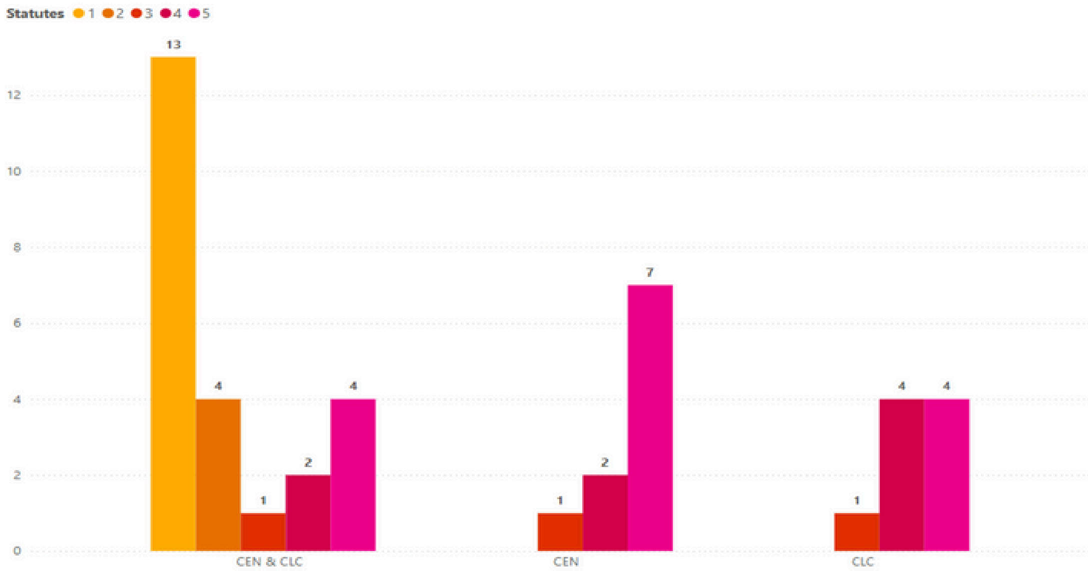
3. DISTRIBUTION OF ORGANIZATIONS BY STAFF SIZE



4. AVERAGE WORKFORCE BY ASSOCIATION

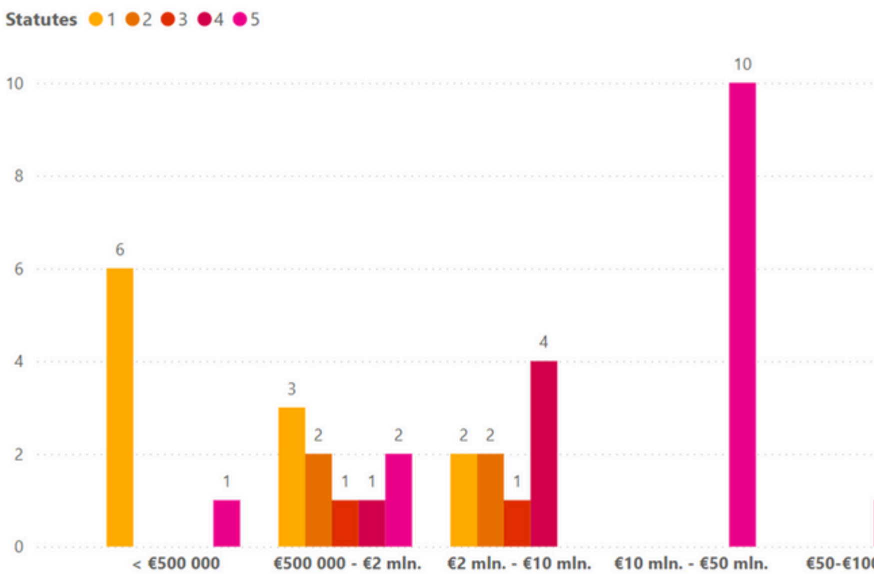


5. DISTRIBUTION OF STATUTES PER ASSOCIATION



The 1 to 5 scale defines the ownership structure of the organization, where 1 is completely public, 3 is balanced public-private, and 5 is completely private

6. MEMBERSHIP BY REVENUE AND STATUTES



- 70% make less then Eur. 10 Mln. in annual revenue;
- 37% make less then Eur. 2 Mln.

The 1 to 5 scale defines the ownership structure of the organization, where 1 is completely public, 3 is balanced public-private, and 5 is completely private

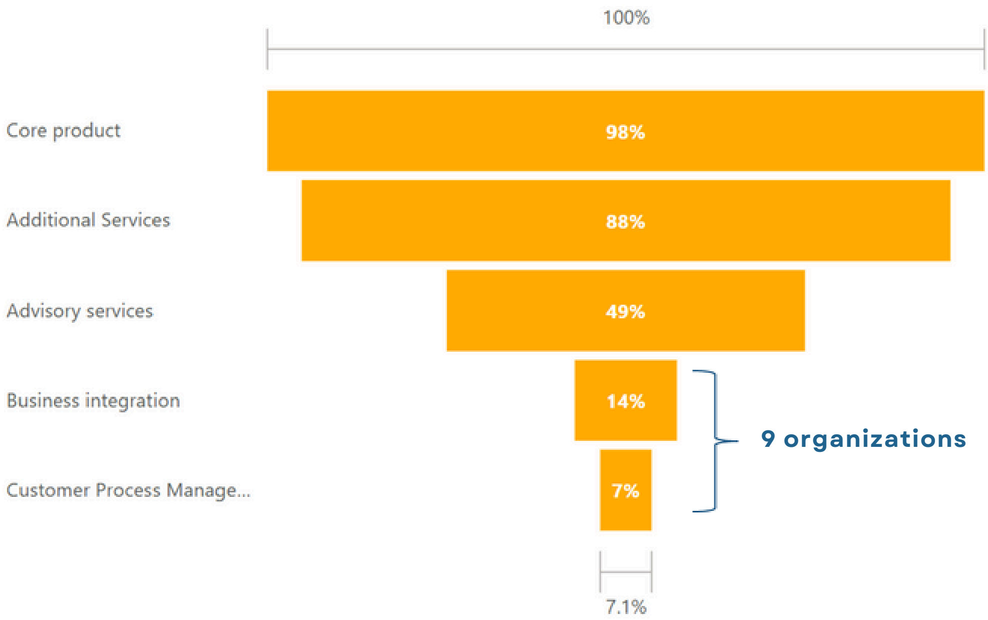
SERVICE AND CONNECTIVITY LEVELS

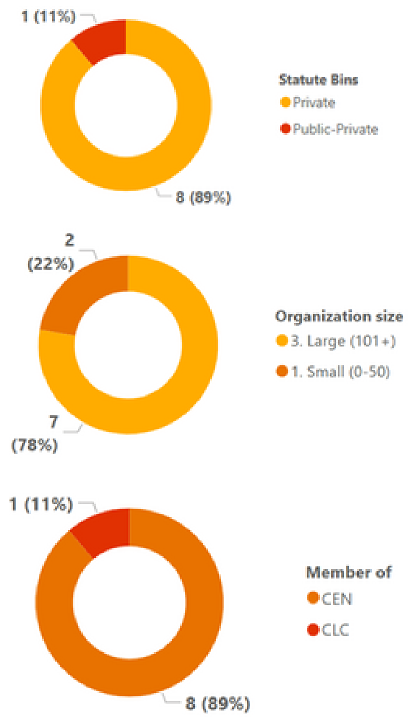
When it comes to **service provision**, statutes (public/private) appears to be the determining factor, with private Members more likely to offer advanced (added value) services than public or predominantly public Members.

For **customer understanding**, two thirds of the Membership report basic connectivity levels, pointing to a lack of understanding of user needs. Size plays a role here, as only mid- to large-size Members report more advanced connectivity levels.

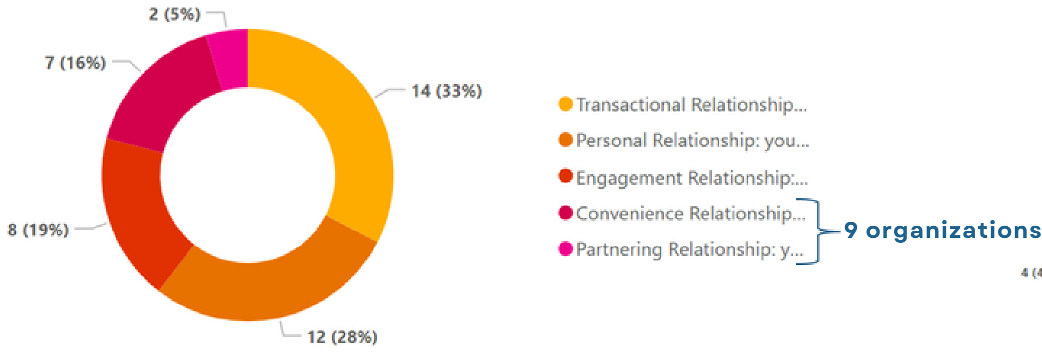
In contrast to the level of service provision, statutes (public/private) do not seem to be a significant factor in how well Members engage with their customers.

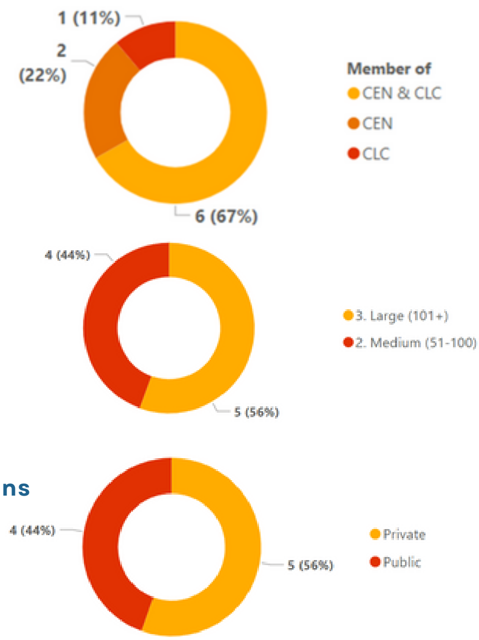
7. DISTRIBUTION BY TYPES OF PRODUCTS AND SERVICES OFFERED





8. MOST ADVANCED CONNECTIVITY-LEVEL WITH A CUSTOMER





CURRENT BUSINESS AND REVENUE MODELS

The **current revenue models** among Members are dominated by traditional sources of revenue:

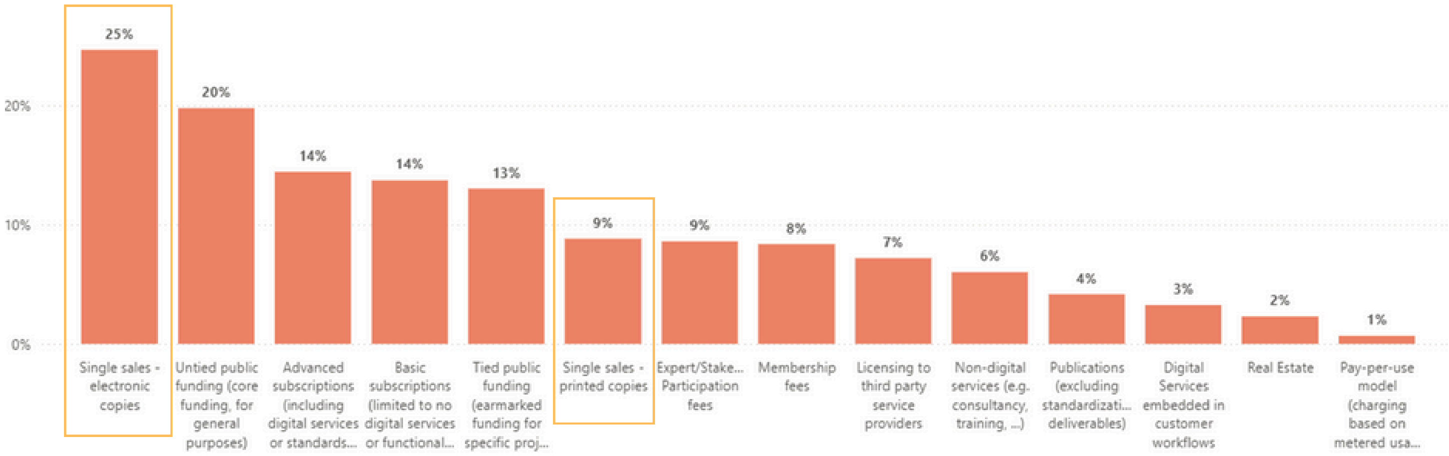
- On average, **single sales** (paper and electronic) account for over one-third of revenues.
- **Subscriptions** are gaining in importance, particularly among medium and large Members.
- **Integrated digital services**, while promising, remain marginal in terms of revenue contribution.

The survey exposes **strong dependencies on single sources of revenue**. Half of the Membership (22) rely on one single business model for over 40% of their total revenue. Depending on what revenue source that is, such narrow revenue bases will become increasingly problematic in view of e.g. increasing demand for free access or decreases in public spending.

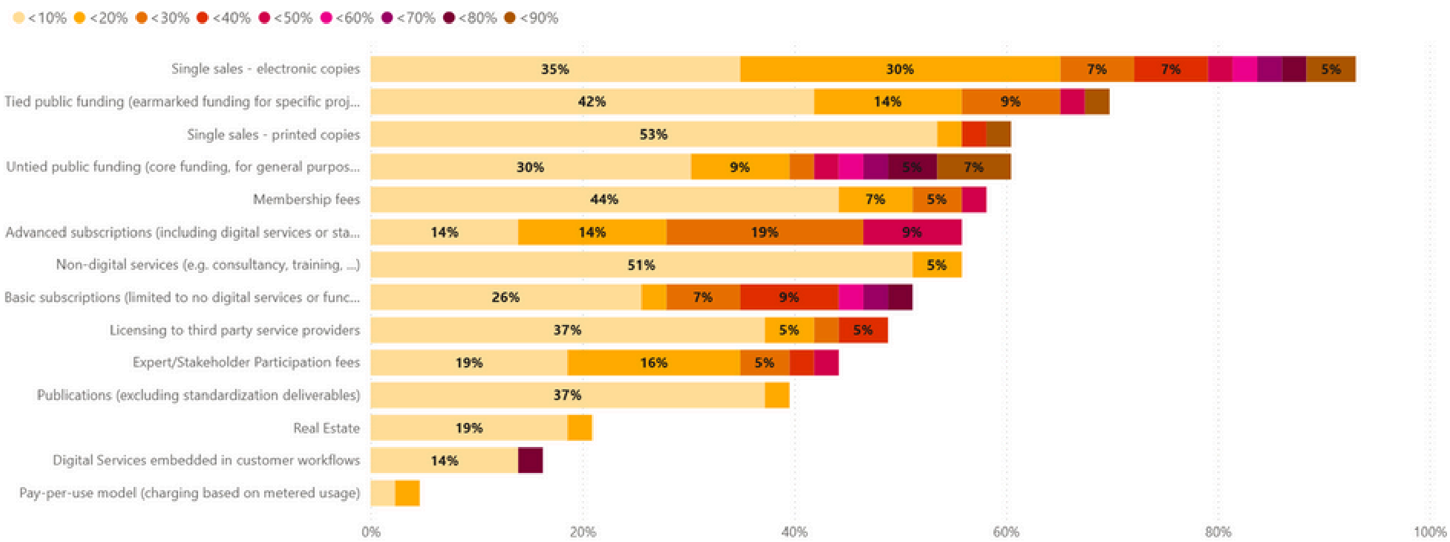
Interestingly, **statutes and size** are significant factors in business model diversity, while sectoral (CEN/CENELEC) differences appear less determinative.

- **Private and mixed** organizations tend to demonstrate more balanced revenue structures
- **Smaller and public** organizations show the highest reliance on single sales and public funding.

9. AVERAGE %-CONTRIBUTION TO ANNUAL REVENUE PER BUSINESS MODEL



10. CURRENT BUSINESS MODELS (% REVENUE)



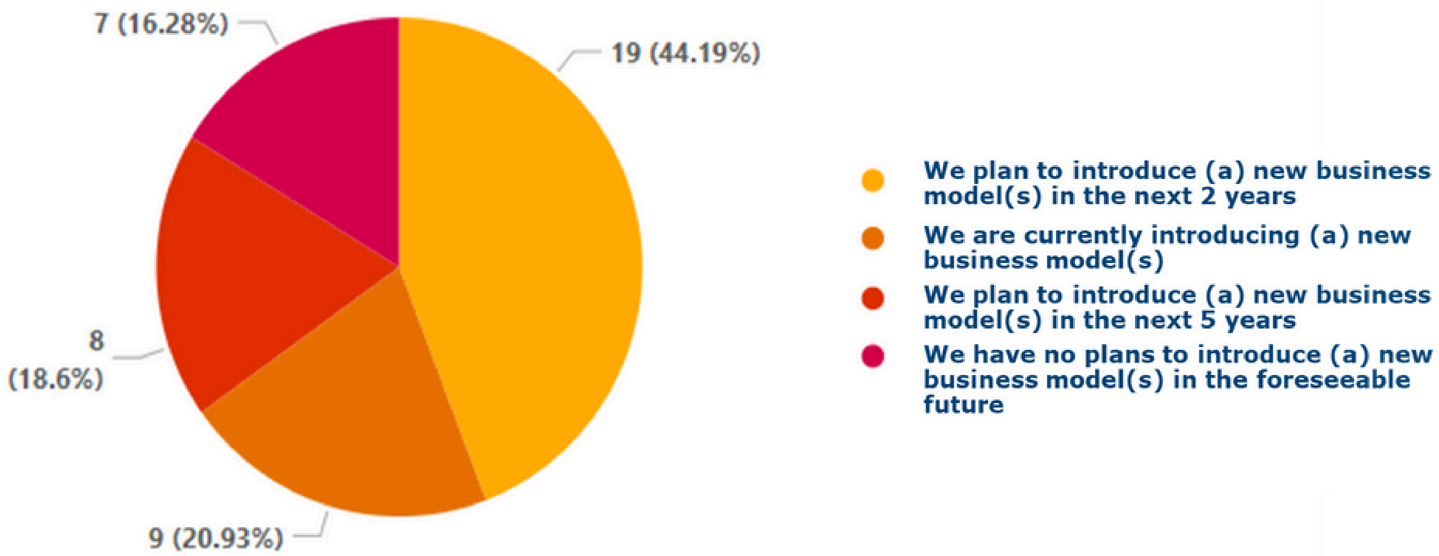
OUTLOOK AND INNOVATION INTENTIONS

Looking ahead, the survey highlights a mix of ambition and uncertainty:

- Looking into Members plans for introducing new Business Models, **65%** of the Membership is **already introducing new business models or plans to do so within two years**. That figure goes up to 80% when we extend the timeline to five years. We note that public Members with a heavy reliance on untied public funding are least inclined to pursue BMI.

- **Confidence in current business models drops** from 60% to 12% over a five-year-time horizon. Members with declining confidence in their models tend to rely heavily on single sales, particularly electronic formats.

11. INTRODUCING NEW BUSINESS MODELS



65% of Members are either currently introducing new business models, or plan to do so in the next 2 years.

BARRIERS TO BUSINESS MODEL INNOVATION

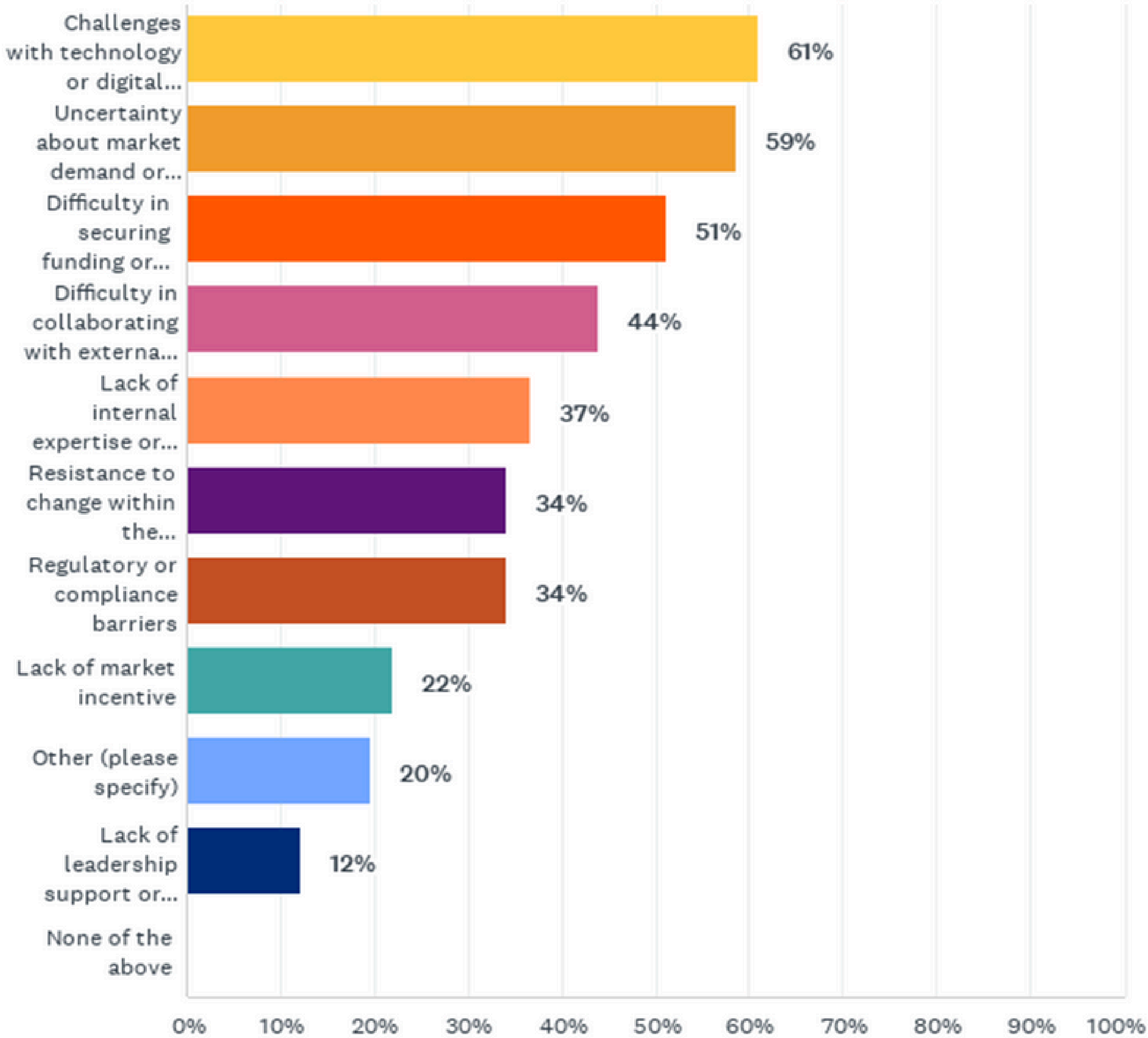
The survey findings highlight several key challenges that require urgent attention:

Firstly, there is a clear **need to enhance digital and technical capabilities**, as many respondents reported limitations in these areas as a barrier to innovation.

Secondly, organizations would benefit from a **stronger understanding of market trends and customer needs**, which is essential for driving relevant and sustainable business model transformations.

Finally, **resource constraints** – both financial and human – remain a significant obstacle. Addressing, or finding ways to bypass these constraints, will be critical for enabling a more effective and more ambitious transformation process across the Membership.

12. KEY CHALLENGES WHEN IMPLEMENTING BMI

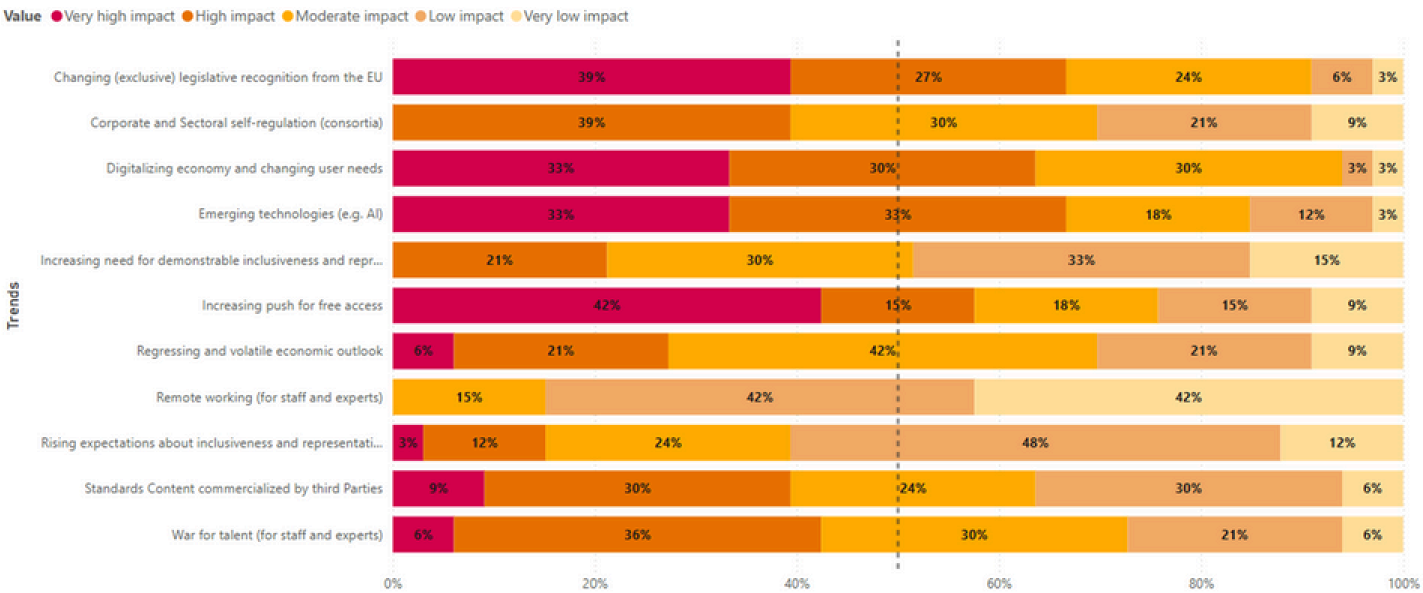


The survey findings confirm that Members face a complex, **rapidly changing market environment**, shaped by interlinked and mutually reinforcing trends.

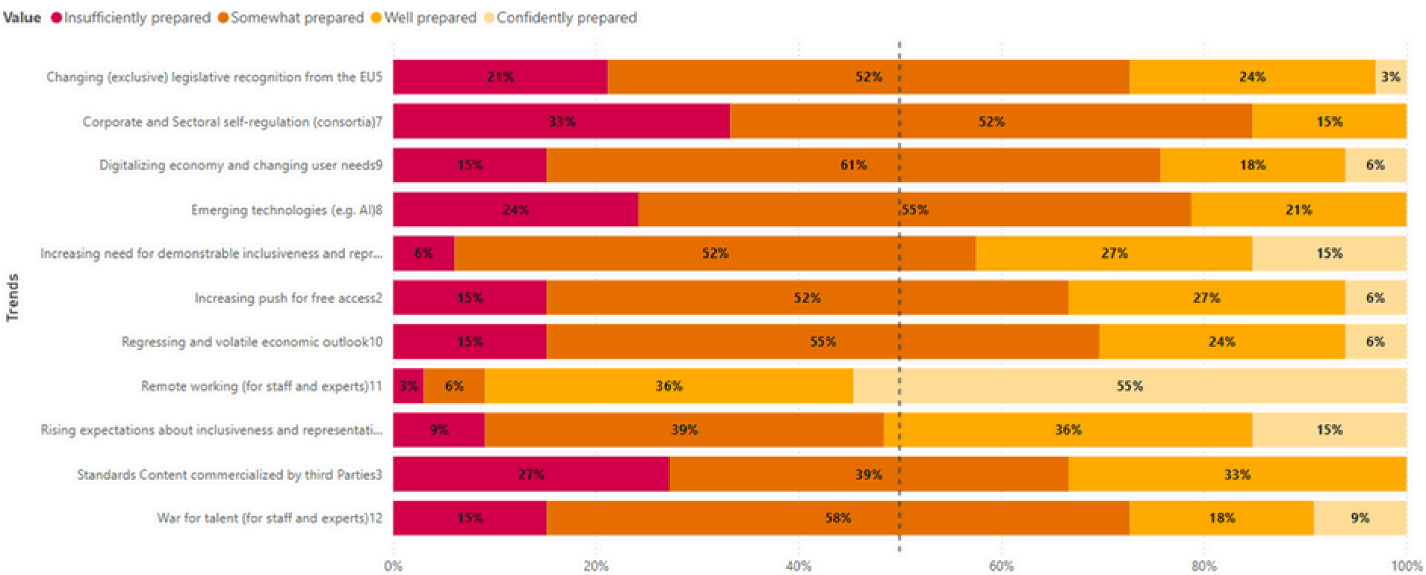
On the one hand, developments in artificial intelligence, the digitalization of user needs, and the growing role of third-party service providers (SaaS), all converge into the emergence of a **new competitive environment**.

On the other hand, a changing EU regulatory framework, an increasing demand for free access to standards from regulators and stakeholders, and the rise of corporate and sectoral self-regulation, amplify the **uncertainty** about the future role of CEN and CENELEC in that changing environment.

13. TRENDS AND PERCEIVED IMPACT ON BUSINESS



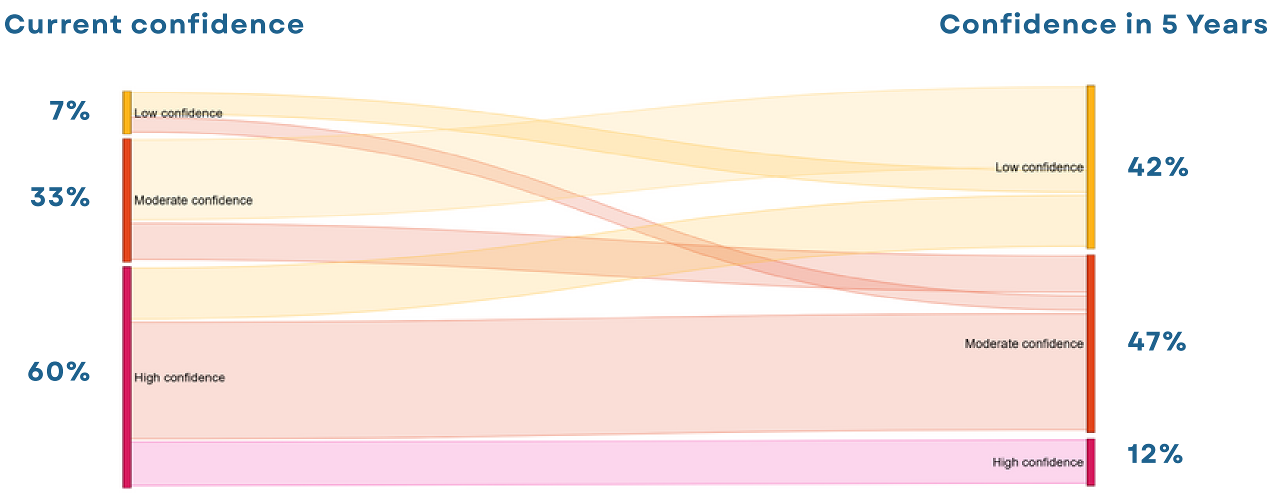
14. LEVEL OF PREPAREDNESS TO TRENDS



In this context, **confidence** in organizational preparedness is **modest overall**.

None of the Members reported feeling confidently prepared to respond to key disruptive developments like the shift toward corporate and sectoral self-regulation, the rapid evolution and adoption of emerging technologies, and the commercial application of standards content by third parties.

This lack of preparedness highlights a **need for coordinated capacity-building and strategic foresight** across the CEN and CENELEC system.



Digital Maturity and Transformation Capacity

The survey reveals a **clear ambition** among Members to advance their digital maturity.

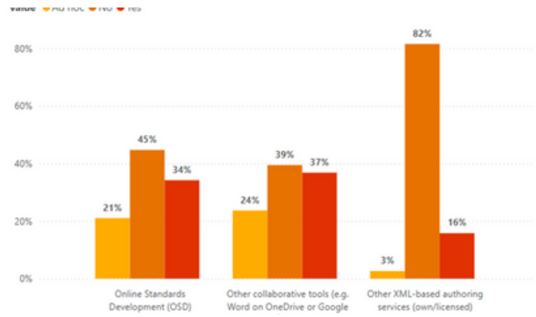
Over 90% aspire to reach either an 'Advanced' or 'Leader' level in digital standardization processes within five years. However, **current maturity levels remain modest**:

- Few Members currently use structured data formats like OSD or XML. AI tools are not yet used in drafting or commenting processes.
- Most Members rate themselves as operating at a 'Basic' or 'Intermediate' level of digital integration.

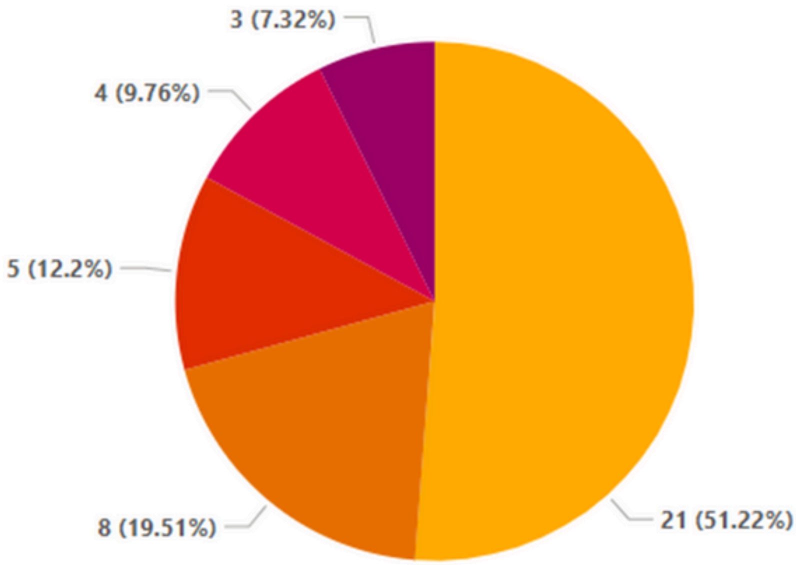
Importantly, the public or private nature of the organization does not appear to influence digital maturity. This suggests that transformation is feasible across institutional types, provided **strategic alignment and resource support** are provided.

14. TOOLS USED FOR DRAFTING NATIONAL STANDARDS

Majority do not use OSD or XML, but do use **other collaborative tools**



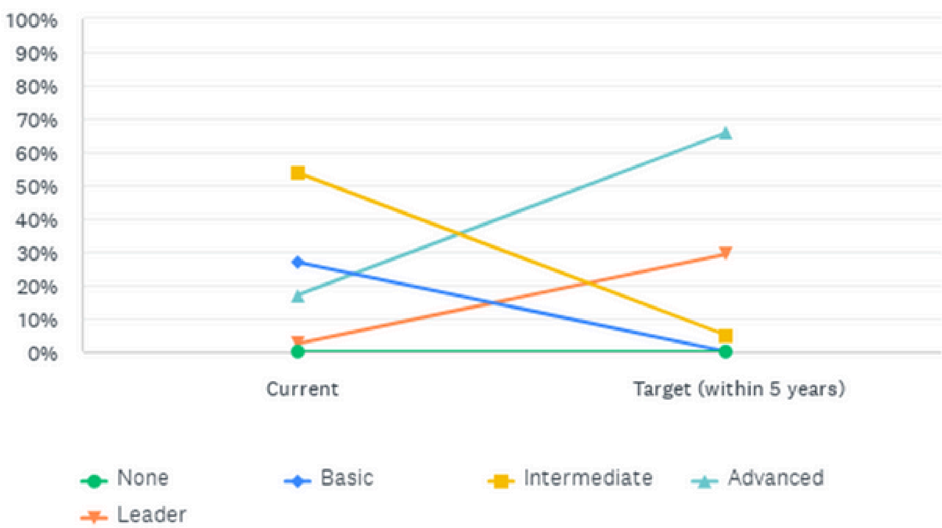
15. TOOLS FOR CONSOLIDATING COMMENTS FROM PUBLIC INQUIRY



0% use AI-based tools for categorizing, identifying duplicates, etc. (interpretive AI/summarizers)

- **Spreadsheet, requiring manual copying & pasting etc.**
- **Ad hoc - various methods with no specific structure or traceability**
- **Well structured & automated spreadsheet - e.g. using Macros**
- **Dedicated tool for categorizing, identifying duplicates, etc.**
- **Blank**

16. CURRENT AND FUTURE (AMBITION) DIGITAL MATURITY LEVELS IN RELATION TO CORE STANDARDIZATION PROCESSES



Scale guide:

None - Lack structure and automation

Basic - Basic structure but lack automation

Intermediate - Structured with basic automation

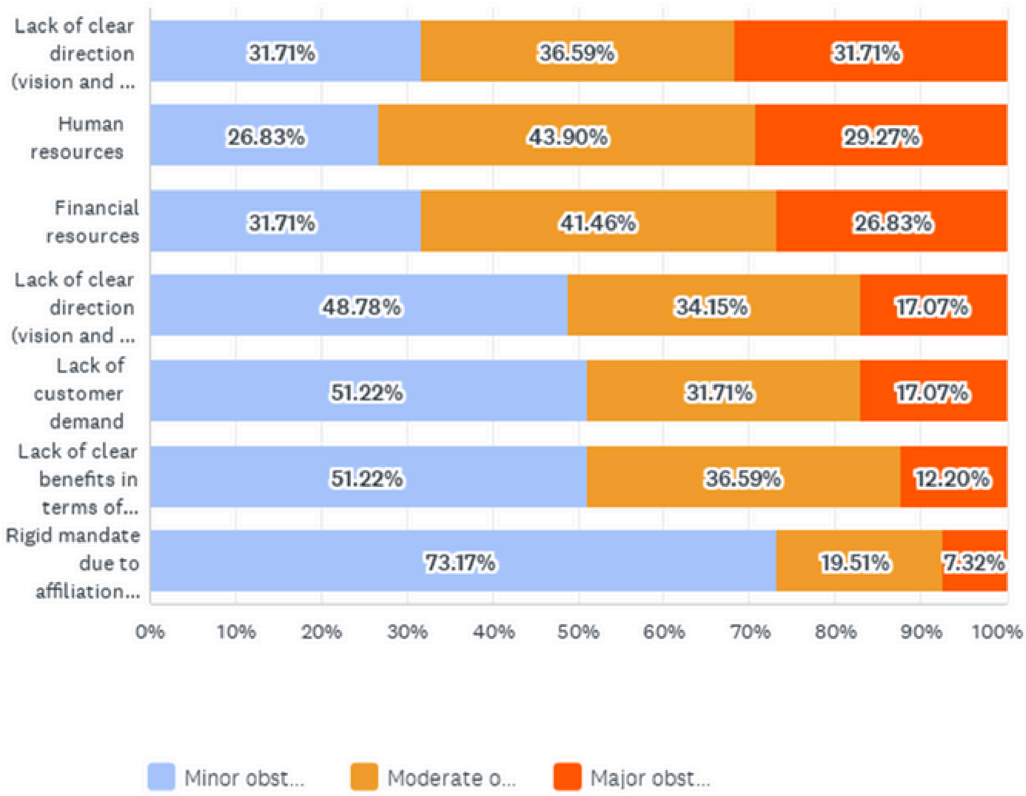
Advanced - Well-structured with robust automation

Leader - Well-structured with robust automation and experimenting with new technologies to improve (AI)

17. MAIN FACTORS THAT LIMIT YOUR TARGET MATURITY LEVEL

CEN & CENELEC

ISO & IEC



BARRIERS TO INNOVATION AND DIGITALIZATION

Across both innovation and digital transformation, Members report overlapping barriers:

- Limited **internal expertise** in digital and technological areas.
- Difficulty securing the necessary **financial and human resources.**
- Limited **collaboration** with external partners.
- The absence of clear, **strategic** vision on future roles and responsibilities, particularly from the European level.
- Uncertainty about **customer needs and future market demand**. This is particularly pronounced among Members who report lower, transactional-type relationships with their customers.

CONCLUSIONS AND EMERGING NARRATIVE

The findings of this survey paint a picture of a community that is both **aware** of the need for transformation and **committed** to evolving its business models and digital capabilities.

Ambition is widespread, progress and capabilities are uneven.

Key insights include:

- Most Members acknowledge the **unsustainability** of legacy revenue models and the limitations of their current digital processes.
- Single sales and public funding remain dominant sources of revenue for a large part of the Membership, and constitute problematic **dependencies** in light of a convergence of disruptive trends.
- Many organizations, particularly smaller and public ones, face significant **capacity limitations**.
- **Vision and clarity** about the future are needed. Members want guidance on direction and roles across governance levels.
- **Customer intimacy** remains underdeveloped, limiting our ability to shape services to market needs.

CONCLUSIONS AND EMERGING NARRATIVE

In short, Members want to change, but we need a collective transformation strategy to enable them to do so, efficiently and successfully.

A coordinated response – centered on long-term strategic resilience, capacity building and a deeper understanding of customer value – can help unlock the full potential of the system. Collective action will be essential to navigate this transition effectively.

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