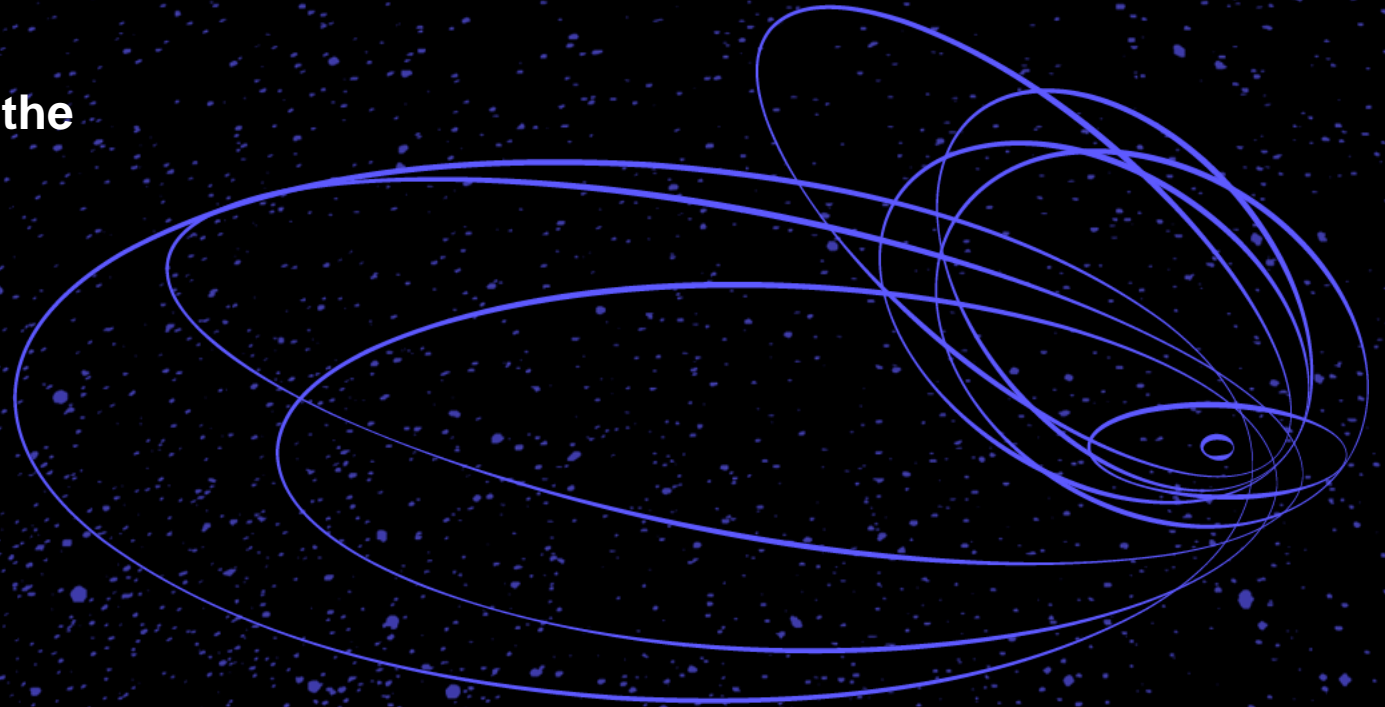


Triple Transition Toolbox

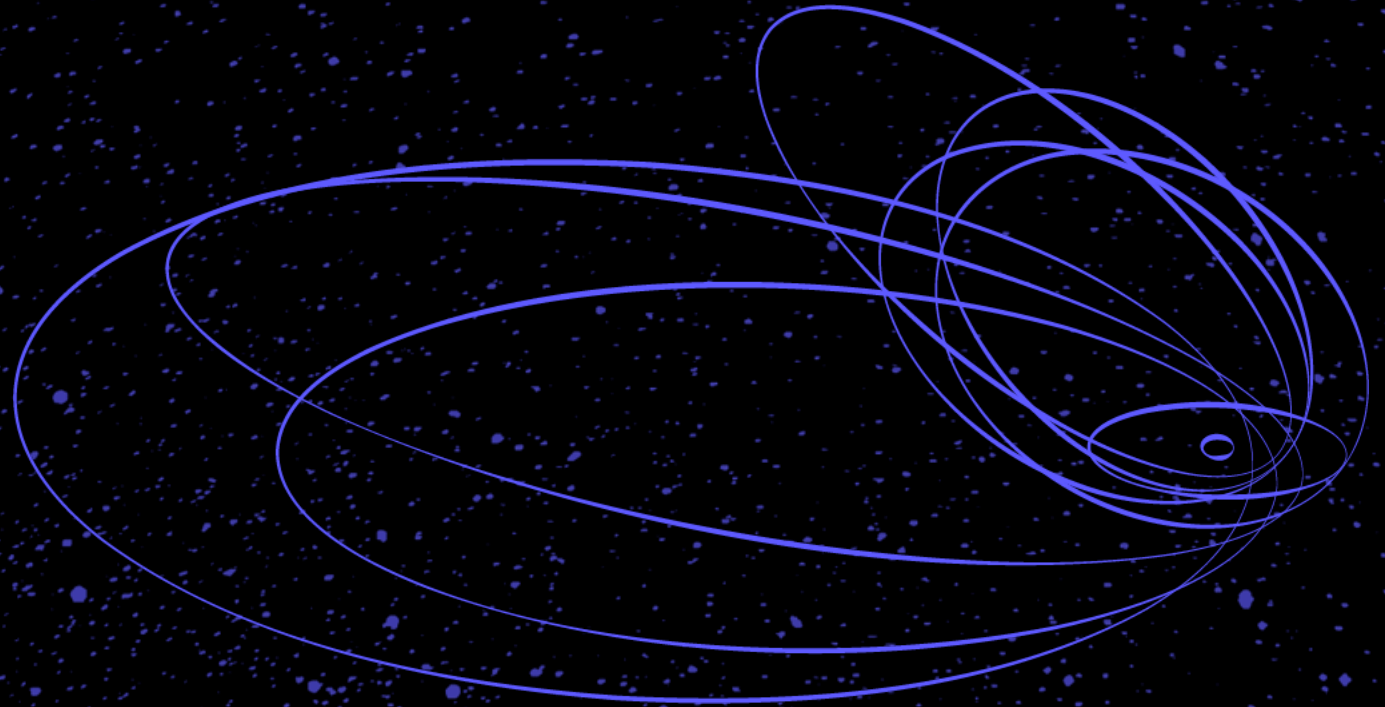
Empowering Sustainable Transformation in the
Tourism Sector



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01. Toolbox Overview



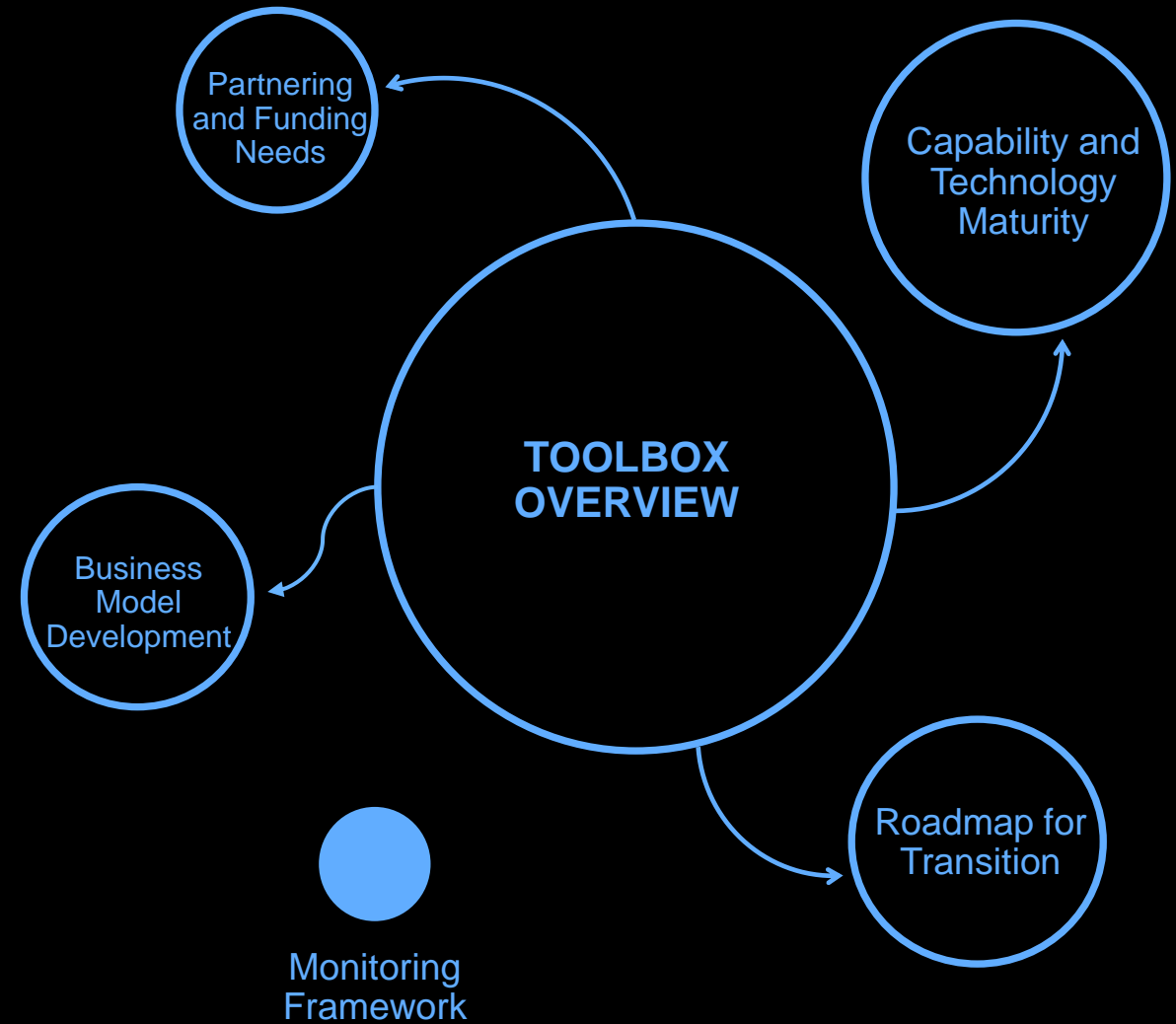
Triple Transition Toolbox

Welcome to the Triple Transition Toolbox

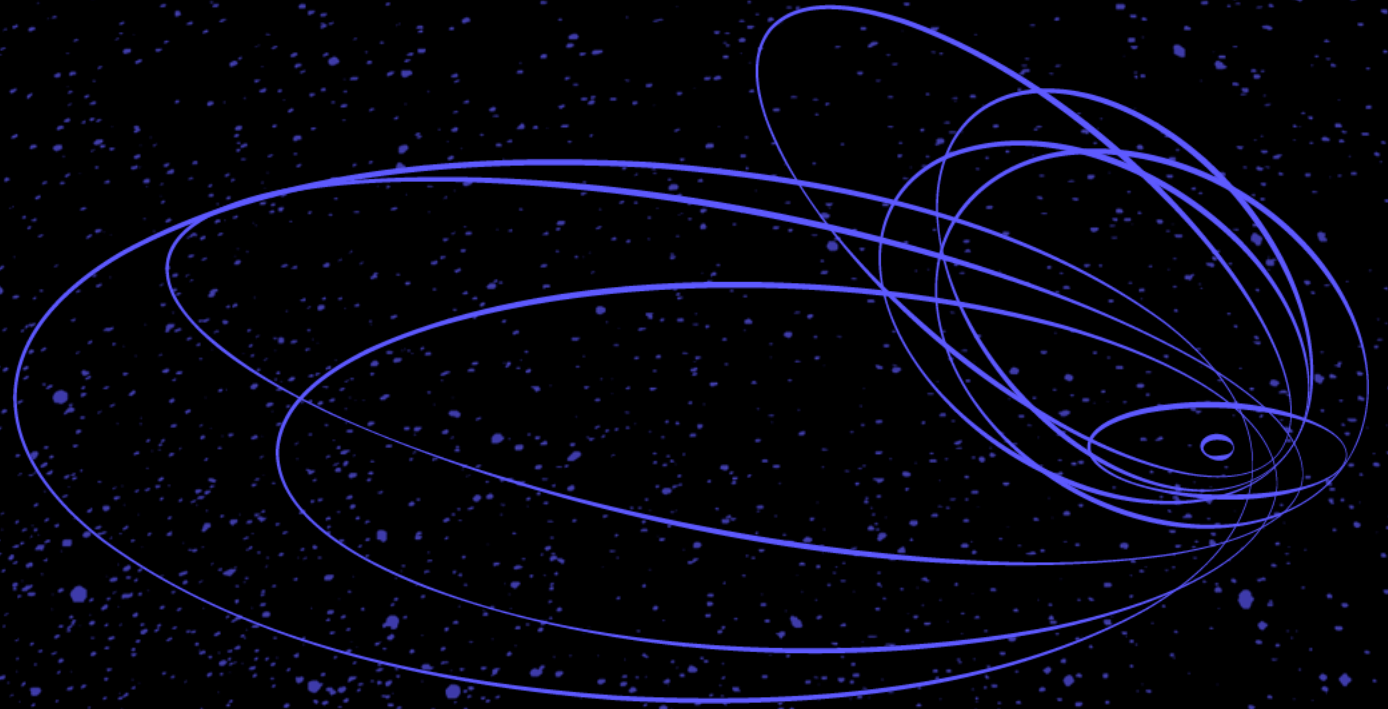
This toolbox is your comprehensive guide to navigating the triple transition journey for tourism SMEs. It's designed to equip you with the knowledge, tools, and resources necessary to excel in a rapidly evolving industry. This toolbox serves as your practical guide to make the triple transition process manageable and effective. We understand the complexity of this journey, which is why we've curated these resources to empower you. Whether you're new to sustainability, digitalization, or resilience, or you're looking to enhance your current practices, the toolbox is here to support you.

The toolbox is organized into several key sections, each aimed at addressing critical aspects of the triple transition process. These sections include:

1. Business Model Development
2. Partnering and Funding Needs
3. Capability and Technology Maturity
4. Roadmap for Transition
5. Monitoring framework



02. Key Components of the Triple Transition



SUSTAINABILITY

Sustainability in the context of the tourism sector is the practice of conducting tourism activities in a manner that preserves and protects the environment, supports local communities, and generates economic benefits without compromising the ability of future generations to do the same. It involves a commitment to responsible tourism that minimizes negative impacts and maximizes positive outcomes.

The importance of sustainability in tourism cannot be overstated. It not only aligns with growing global awareness and concern for environmental and social issues but is also essential for the long-term viability of the industry.

Sustainable tourism practices can help destinations maintain their attractiveness, protect their cultural heritage, and ensure the well-being of local residents. By integrating sustainability into their business models, SMEs can contribute to a more ethical and resilient tourism industry.

DIGITALIZATION

Digitalization is a transformative force that has reshaped the tourism industry. It encompasses the adoption of digital technologies to enhance operations, improve customer experiences, and drive competitiveness. From online booking platforms, mobile apps, and data analytics to virtual reality tours and social media marketing, digitalization empowers businesses to streamline their processes, reach a wider audience, and stay ahead in an increasingly digital world.

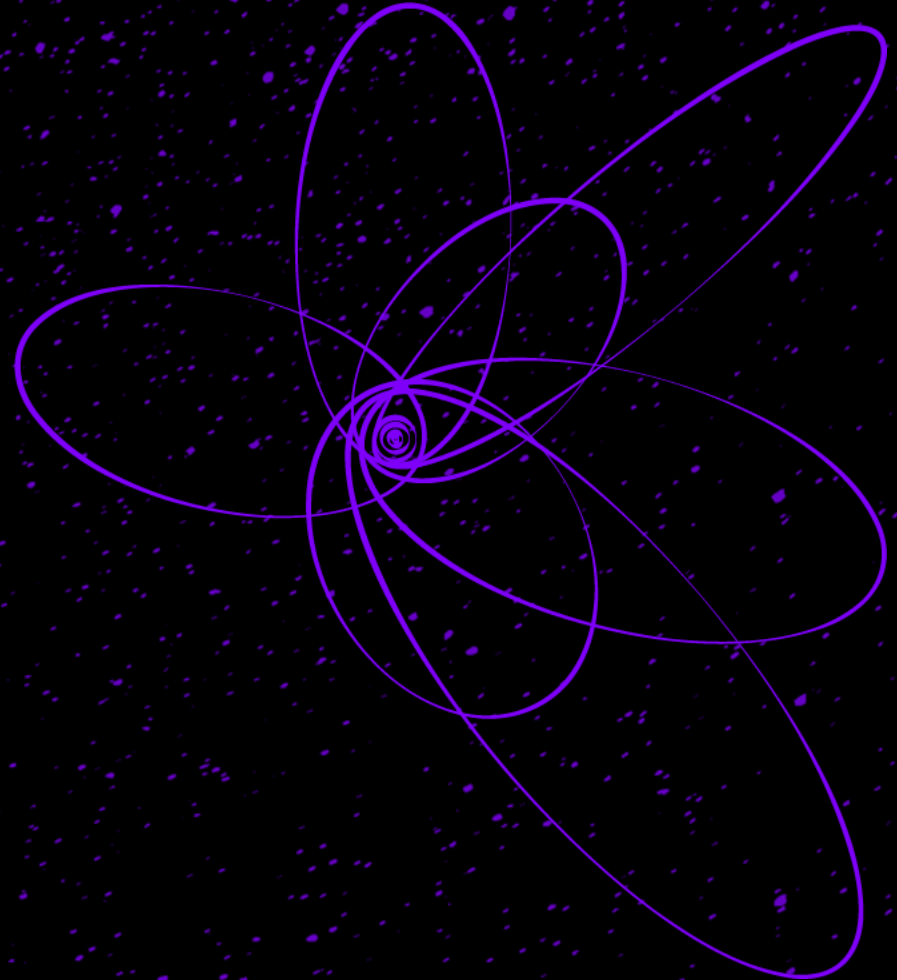
SMEs need to leverage digital technologies, needing guidance in harnessing the full potential of digital technologies. Whether through implementing cloud-based reservation systems for streamlined booking or using data analytics to gain insights into customer preferences, digitalization offers numerous tools to enhance business performance. It empowers SMEs to create personalized experiences, connect with customers, and adapt to changing market dynamics in real-time.

RESILIENCE

The Need for Resilience: The tourism industry is susceptible to various external challenges, including natural disasters, public health crises, economic downturns, and geopolitical uncertainties. Resilience in tourism is the ability to prepare for, withstand, recover from, and adapt to these challenges. It ensures that tourism businesses can continue to provide services, protect livelihoods, and maintain the overall integrity of the industry even when faced with adversity.

SMEs need to be equipped with the knowledge and strategies to build resilience into their operations and strategies. It covers a range of factors, including risk management, crisis preparedness, and adaptability. By implementing comprehensive risk assessments, developing contingency plans, and fostering an organizational culture of resilience, SMEs can enhance their capacity to weather unforeseen events and emerge from them more robust and agile. Resilience ultimately contributes to business sustainability and long-term success.

03. Business Model Development



Cultivating innovation

The Innovation Lifecycle: Innovation within your business model can be thought of as a journey with three pivotal points: **launch, peak growth, and technological substitution**. These milestones represent critical phases of innovation and understanding them is key to long-term success.

The journey typically begins with a keen **observation**, where you identify an area of opportunity and a challenge to solve. This initial step is crucial for pinpointing the right direction for innovation.

Once the **challenge is defined**, we embark on the quest to **find an idea that can address it**. Throughout this process, we engage with potential customers and users to incorporate their experiences and feedback. Their input is invaluable.

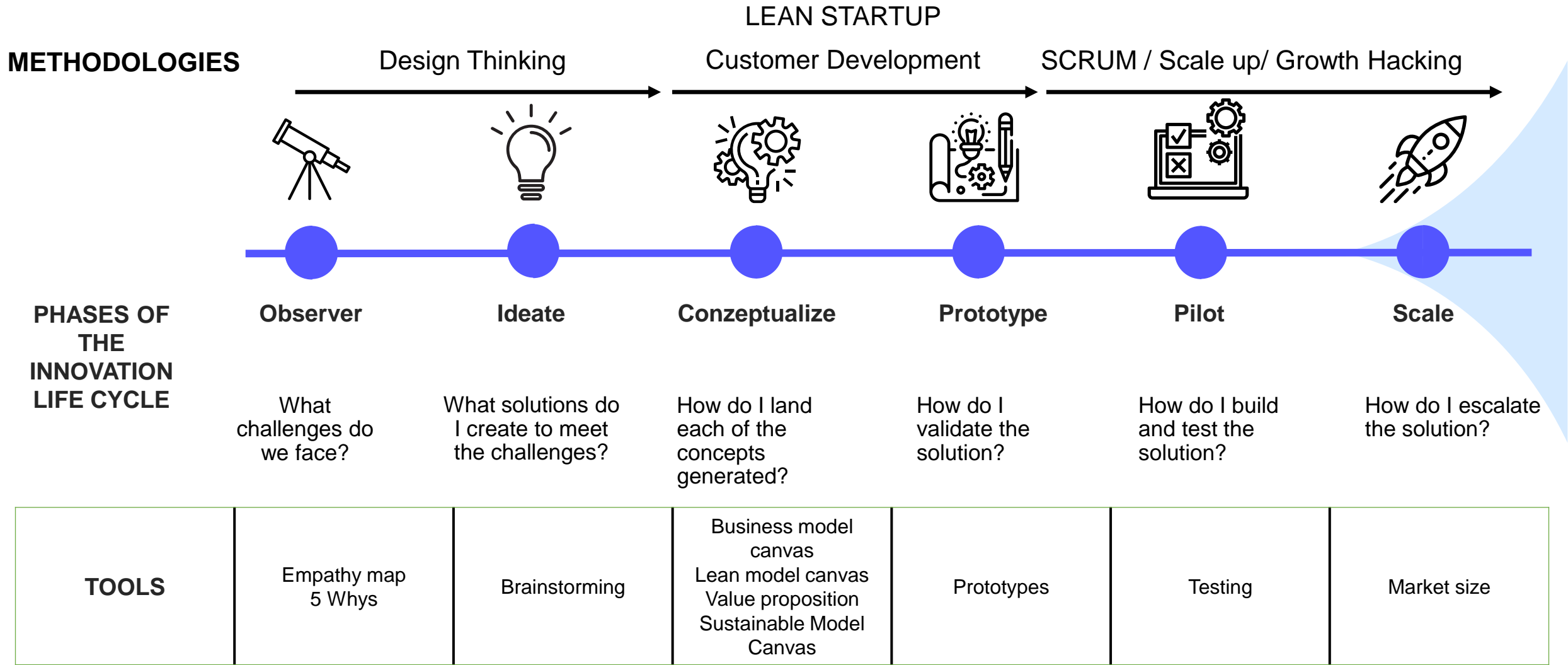
The idea evolves into a more concrete concept, and the first steps toward developing a **proof of concept** are taken. It's at this stage that we begin to integrate essential business elements, including cost structures, customer segments, value propositions, and resource allocation. The goal is to create a holistic concept that aligns with your innovation.

Following conceptualization, we move to the **prototype phase**. Here, we build a preliminary version of the innovation to test its feasibility and functionality. It's an essential step in refining the idea before committing significant resources.

With a successful prototype, we move to **the pilot** phase. This involves testing the innovation within a controlled environment or with a limited group of customers. This real-world **testing** helps uncover any issues or improvements needed before full-scale implementation.

Once the pilot phase is successful, we reach the **scale stage**, where the innovation is implemented on a broader scale. This often involves marketing, expanding the user base, and optimizing processes for widespread adoption.

Cultivating innovation



First step: Understanding the Gap

The Gap Analysis:

Gap analysis is a strategic approach used to assess the current state of a business or project and compare it to the desired future state. It identifies the gaps, discrepancies, and areas for improvement.

Gap analysis is an essential tool in business model development. It helps SMEs recognize where they currently stand and where they need to be in terms of sustainability, digitalization, and resilience. By pinpointing these gaps, businesses can make informed decisions and create effective strategies for bridging them. Gap analysis is not a one-time exercise. It's an iterative process that should be repeated regularly to adapt to changing circumstances and goals.

Additionally, for the development of this analysis, other tools for previous analysis could be used, such as: SWOT, PESTLE, Fishbone Diagram...

By continually analyzing and closing gaps, SMEs can stay agile and responsive to evolving challenges and opportunities. It's the first step in creating a roadmap for your triple transition journey.



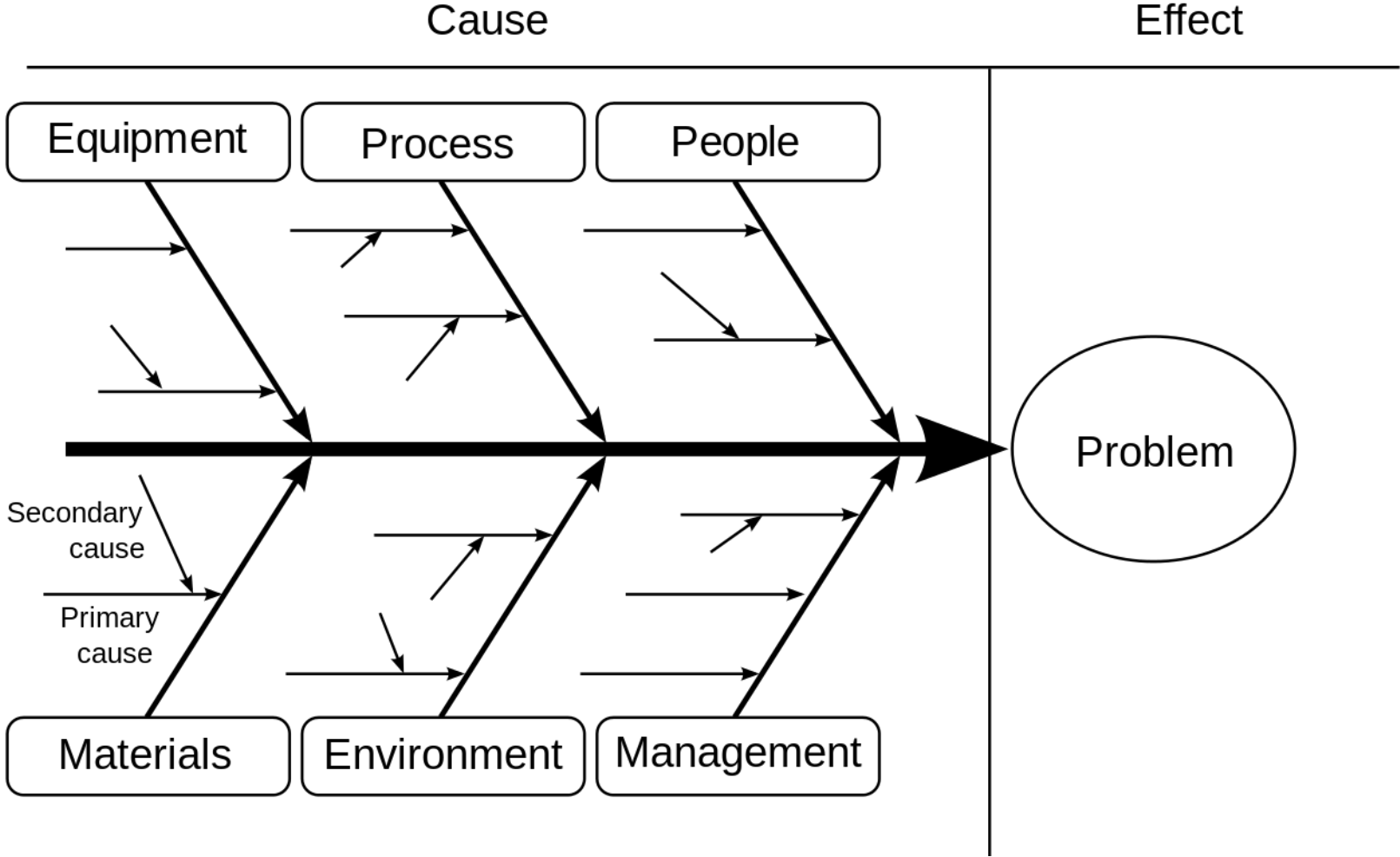
First step: Understanding the Gap

FOCUS AREA	CURRENT STATE	DESIRED FUTURE STATE	IDENTIFIED GAP	ACTION PLAN
<i>What are you focused on?</i>	<i>Where are you now?</i>	<i>Where would you like to be?</i>	<i>Difference between desired state and current state</i>	<i>Actions/Project you Will undertake to bridge the gap</i>
<i>[Focused area] For example: Sustainability, Resilience, Digitalization</i>	<i>[Current state]</i>	<i>[Desired state]</i>	<i>[Gap]</i>	<i>[Action/Project]</i>
<i>[Focused area] For example: Sustainability, Resilience, Digitalization</i>	<i>[Current state]</i>	<i>[Desired state]</i>	<i>[Gap]</i>	<i>[Action/Project]</i>
<i>[Focused area] For example: Sustainability, Resilience, Digitalization</i>	<i>[Current state]</i>	<i>[Desired state]</i>	<i>[Gap]</i>	<i>[Action/Project]</i>
<i>[Focused area] For example: Sustainability, Resilience, Digitalization</i>	<i>[Current state]</i>	<i>[Desired state]</i>	<i>[Gap]</i>	<i>[Action/Project]</i>

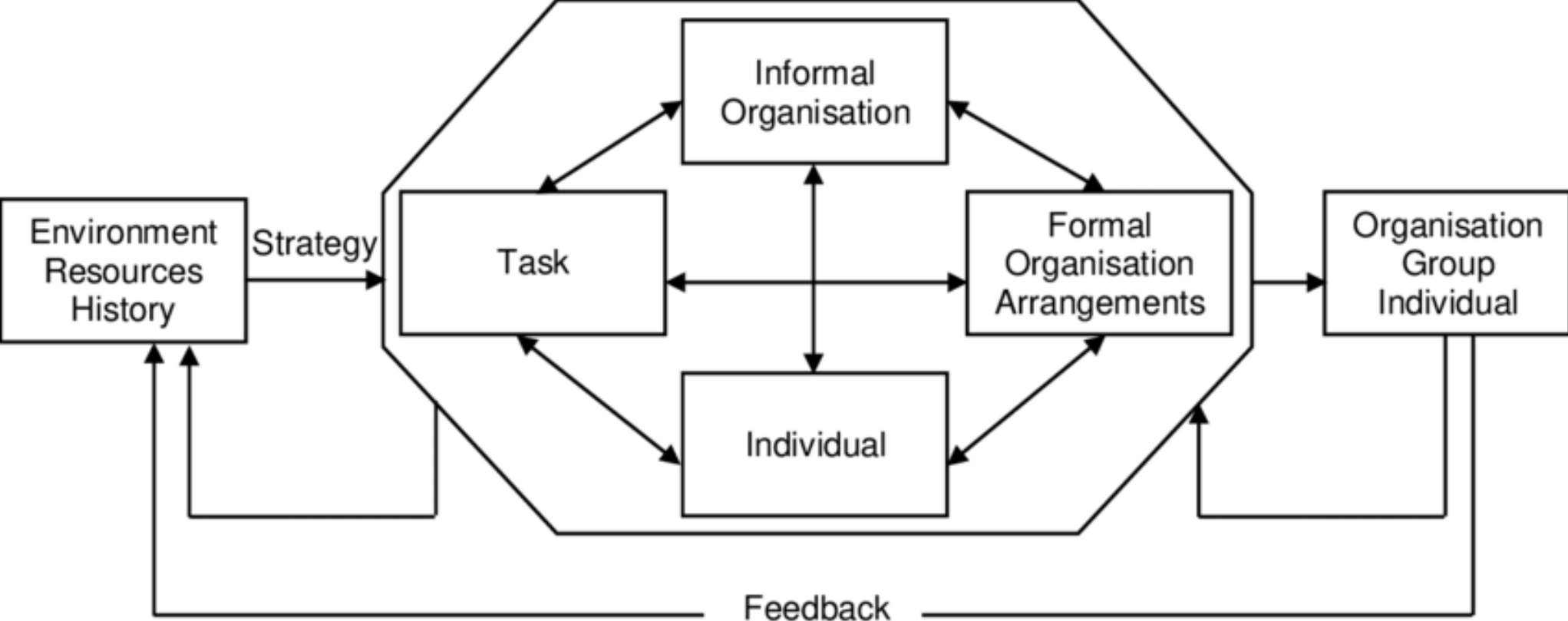
Previous analysis: SWOT

Positive	Negative	
Strengths	Weaknesses	Internal
Opportunities	Threats	External

Previous analysis: Fishbone Diagram



Previous analysis: Nadler-Tushman Model



Previous analysis: PESTLE

P	E	S	T	L	E
Political	Economical	Social	Technological	Legal	Environmental
<p>Explore:</p> <ul style="list-style-type: none"> • Government stability • Financial stimulus commitment • Pandemic strategic plan • Health service readiness • Pandemic policy factors • Current taxation policy • Future taxation policy • The current and future political support • Grants, funding and initiatives • Trade bodies • Effect of wars or worsening relations with particular countries • Election campaigns • Issues featuring in political agendas 	<p>Explore:</p> <ul style="list-style-type: none"> • National debt levels • Recovery struggle for impacted industry • Strength of consumer spending • Current and future levels of government spending • Ease of access to loans • Current and future level of interest rates, inflation and unemployment • Specific taxation policies and trends • Exchange rates • Overall economic situation • Real estate exodus • Inner city business decline • Supply volatility 	<p>Explore:</p> <ul style="list-style-type: none"> • Pandemic lifestyle trends • demographics • consumer attitudes and opinions • media views • law changes affecting social factors • brand, company, technology image • consumer buying patterns • fashion and role models • major events and influence • Inner city pandemic trends • ethnic/religious factors • ethical issues • Digital relationships 	<p>Explore:</p> <ul style="list-style-type: none"> • Relationship with pandemic • Sector technology demand • Relevant current and future technology innovations • The level of research funding • The ways in which consumers make purchases • Intellectual property rights and copyright infringements • Global communication technological advances • Internet connectivity utility 	<p>Explore:</p> <ul style="list-style-type: none"> • Legislation in areas such as employment, competition and health & safety • Environmental legislation • Future legislation changes • Changes in European law • Trading policies • Regulatory bodies • Pandemic legislation • Working environment • Pandemic legal sensitivities 	<p>Explore:</p> <ul style="list-style-type: none"> • Relationship with global warming • Relationship with recycling and global fight against waste • Relationship with global fight against plastic usage • The level of pollution created by the product or service • Attitudes to the environment from the government, media and consumers • Relationship with renewable energy • Relationship with deforestation

PESTLE Analysis Cheat Sheet

Second step: Crafting a Sustainable Business Model

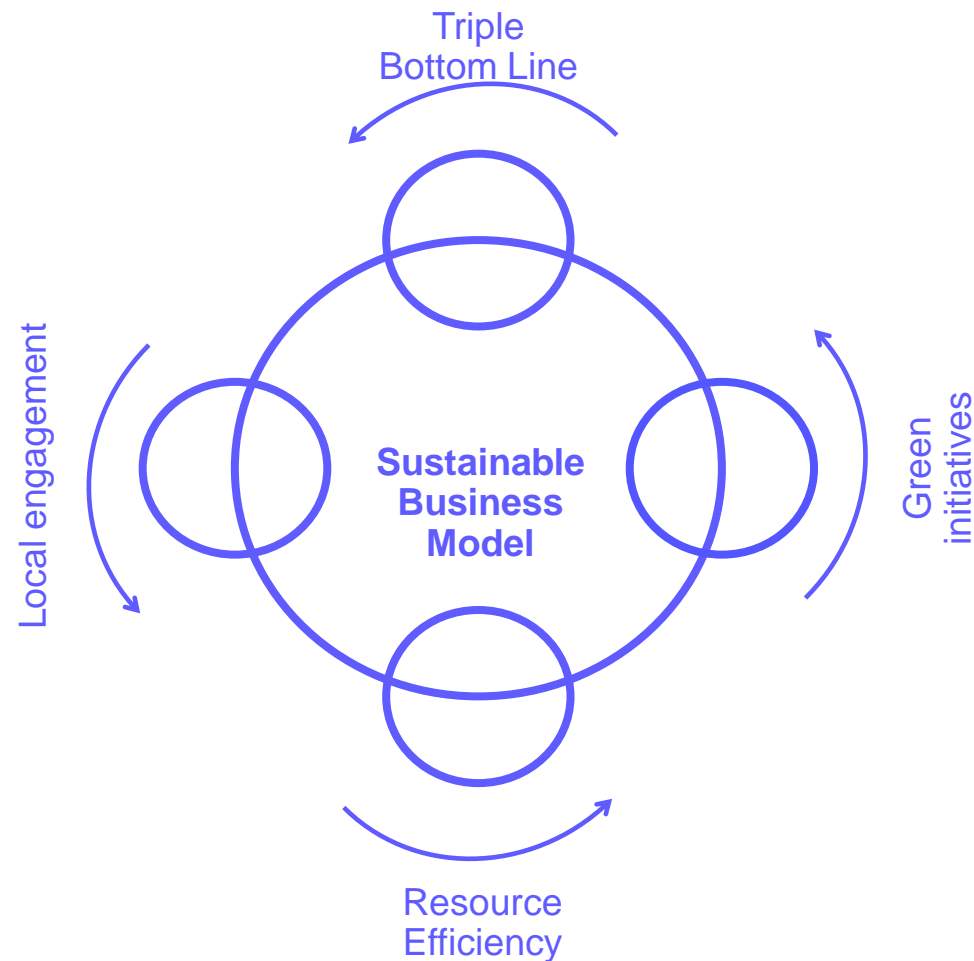
Sustainability in the context of your tourism SME is not just a buzzword; it's a guiding principle. It involves rethinking your approach to align with economic, social, and environmental well-being.

Key Considerations for a Sustainable Business Model:

- **Triple Bottom Line:** Embrace the triple bottom line concept, which evaluates success not only in financial terms but also through its impact on people and the planet. Your business model should aim to create value across these three dimensions.
- **Resource Efficiency:** Prioritize resource efficiency and waste reduction. Explore circular

economy principles to minimize waste, extend product lifecycles, and reduce environmental impact.

- **Local Engagement:** Engage with local communities and stakeholders. Foster partnerships that promote community development, cultural preservation, and inclusive tourism practices.
- **Green Initiatives:** Integrate green initiatives and environmentally friendly practices into your operations. This may involve sustainable sourcing, renewable energy, or eco-certifications.



Second step: Crafting a Sustainable Business Model

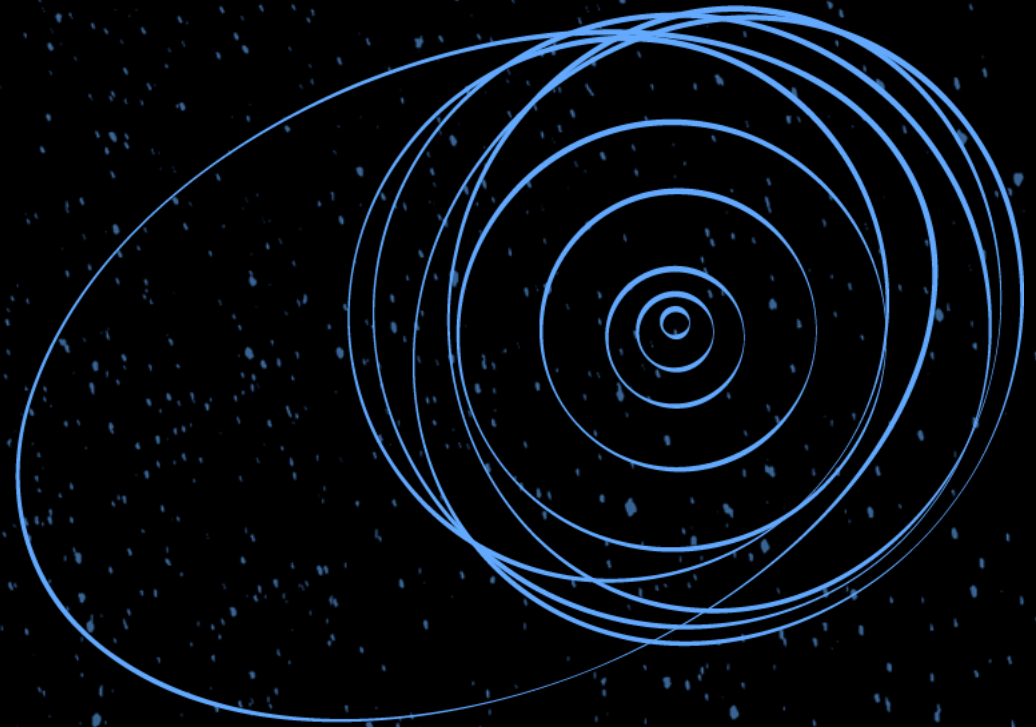
Following the innovation lifecycle, we can express the following phases and tools that can be used:

- 1. Know your customer.** Place your customers at the heart of your sustainable business model. Understand their evolving expectations and desires. Create products and experiences that align with their sustainability values and preferences. For this purpose, **a empathy map** could be useful.
- 2. Uncover the root causes of your challenges.** Here you can identify the underlying causes of sustainability challenges within your tourism SME. Use tools like the **"5 Whys"** to systematically explore these challenges and understand their origins.
- 3. Generate innovative ideas:** Encourage creative thinking and idea generation to address sustainability challenges and opportunities. Tools

like brainstorming can be particularly useful in this phase to foster innovative thinking

- 4. Visualizing Sustainable Business Models:** In the journey towards crafting a sustainable business model, visual tools are invaluable for mapping out your strategies and ideas. Here are three key canvas tools designed to help you design and refine your sustainable business model: ***Business Model Canvas / Lean Business Model Canvas; Value Proposition Canvas, Sustainable Business Model Canvas.***
- 5. Market Analysis Tools for Informed Decisions:** In the pursuit of a sustainable business model, understanding the market is pivotal. These tools will help you assess market dynamics, competition, and opportunities: market size analysis, competitor analysis, etc.

Integrating Sustainability into Business Model



Know your customer

EMPATHY MAP

Empathy mapping is a technique to gain a deep understanding of your customers' perspectives, needs, and emotions. It's a crucial step in creating products and services that resonate with their sustainability values.

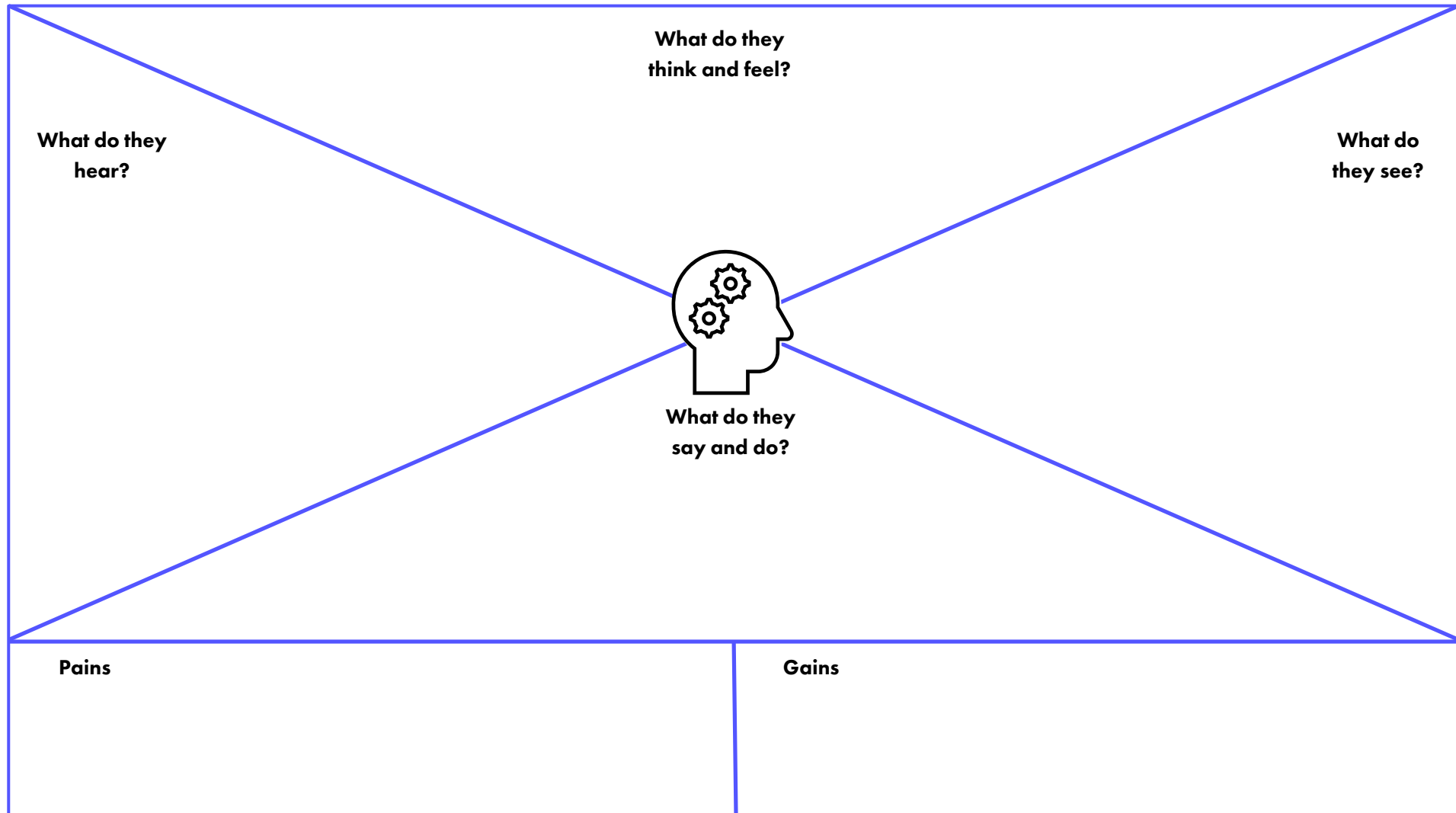
Build empathy maps that depict your customer segments. Identify what they say, think, feel, and do, and gain insights into their

pain points and aspirations. This helps you design solutions that truly address their needs.

Use the empathy map to pinpoint areas where sustainability aligns with your customers' values and desires. Tailor your business model to meet these expectations.



Empathy Map - Template



Root Cause Analysis

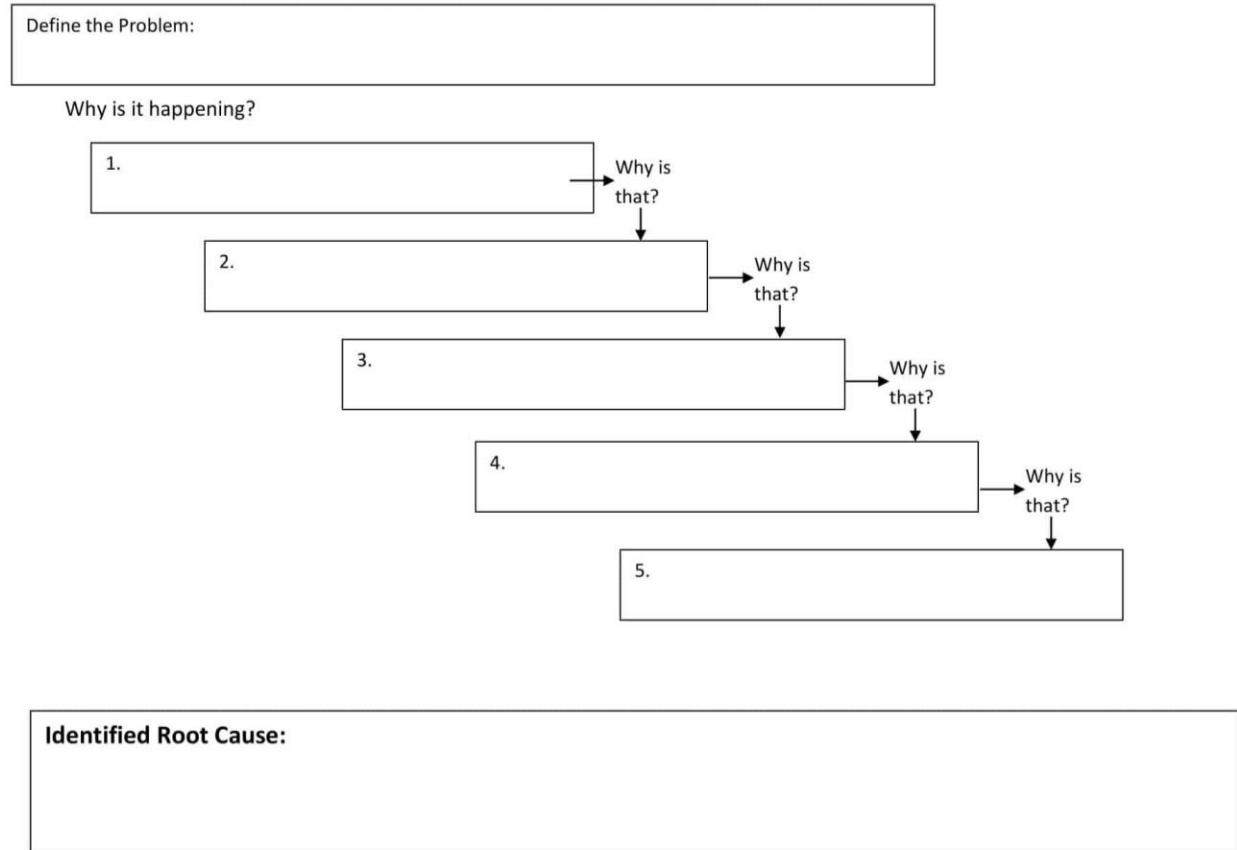
5 WHY?

The 5 Whys technique is a structured approach for identifying the root causes of problems or challenges. It's particularly useful for uncovering the underlying issues affecting your business model's sustainability.

How it Works: Start with a specific issue or challenge related to sustainability. Ask "Why?" five times,

delving deeper with each question to get to the core problem. This iterative process helps you reveal the true cause.

Once you've identified the root cause, you can develop strategies to address it. By resolving the core issues, you can enhance the sustainability of your business model.



Brainstorming

What is Brainstorming?

Brainstorming is a creative problem-solving technique used to generate a wide range of ideas within a group or team setting. It fosters innovation, encourages teamwork, and can lead to novel solutions to challenges, making it an essential tool for crafting a sustainable business model.

There are some key principles for ensuring a good development while brainstorming:

- **Quantity over quality:** The primary goal is to produce as many ideas as possible without judgment or criticism.
- **Free and open environment:** Participants are encouraged to think freely and express any idea, no matter how unconventional it may seem.

- **Diverse perspectives:** Diversity in the group leads to a broader range of ideas.

- **Time limited:** Brainstorming sessions often have a set time limit to maintain focus and creativity.

- **Building upon ideas:** Participants can build upon or modify ideas proposed by others.



Brainstorming - Template

Brainstorming

Add your ideas here

Add your ideas here

Add your ideas here

Brainstorm area

Our favorite ideas

1 Copy a sticky note, then write your thoughts.

Añade tu idea aquí.

Añade tu idea aquí.

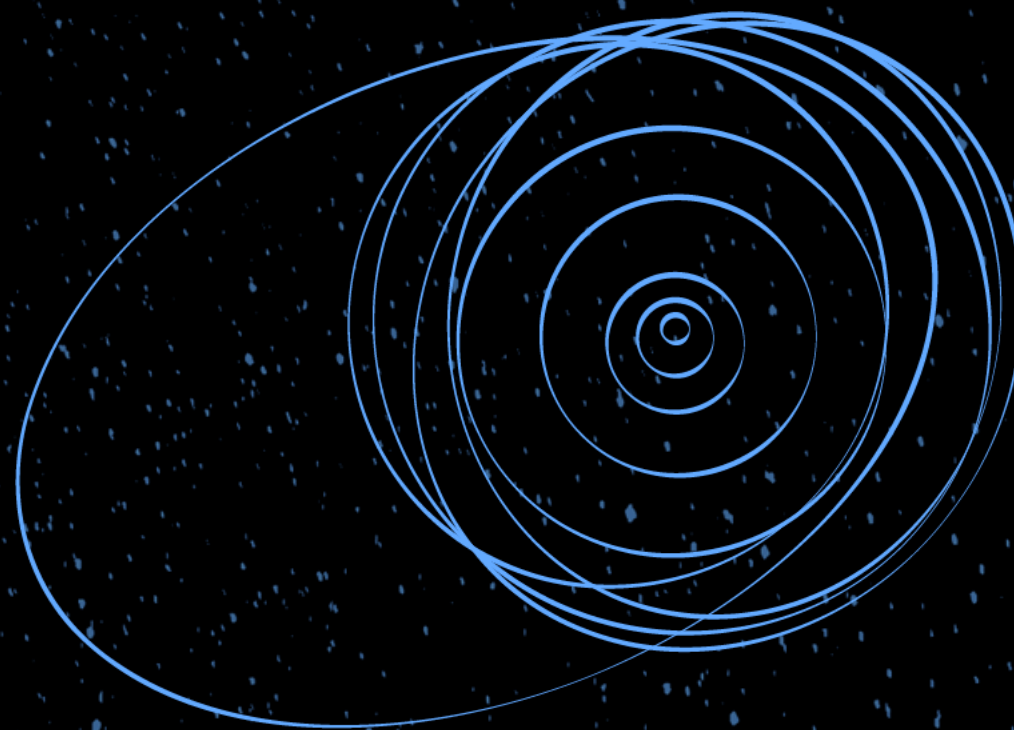
2 Vote for your favorite ideas with these stars or stickers.



3 Circle or comment on any promising ideas.



Visualizing Sustainable Business Models



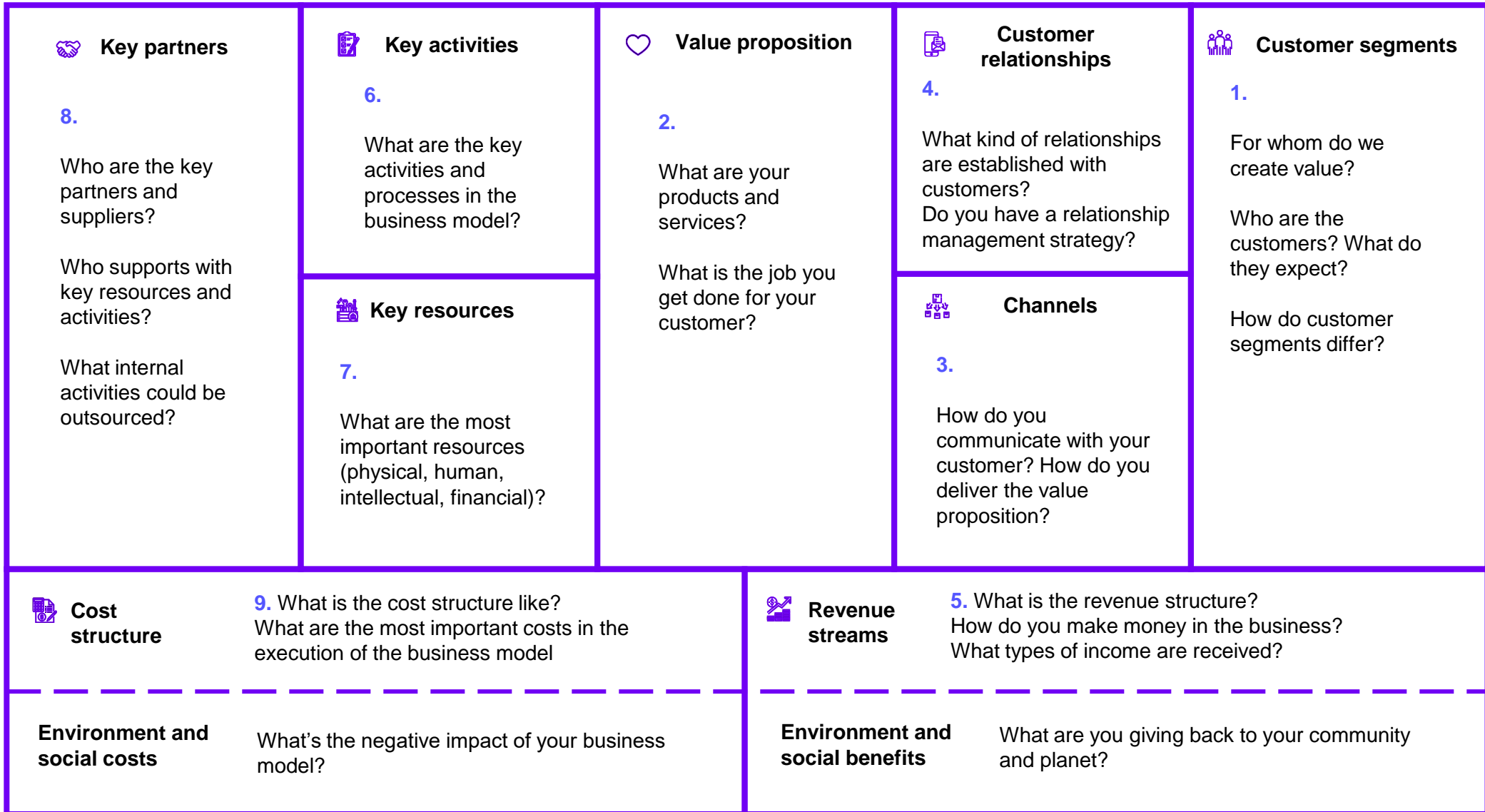
Business Model Canvas (BMC) - Explained

The Business Model Canvas (BMC) is a strategic management tool and visual framework that helps professionals to describe, design, challenge, and pivot their business models. The canvas consists of nine key elements or building blocks, each of which plays a crucial role in defining how a business operates.

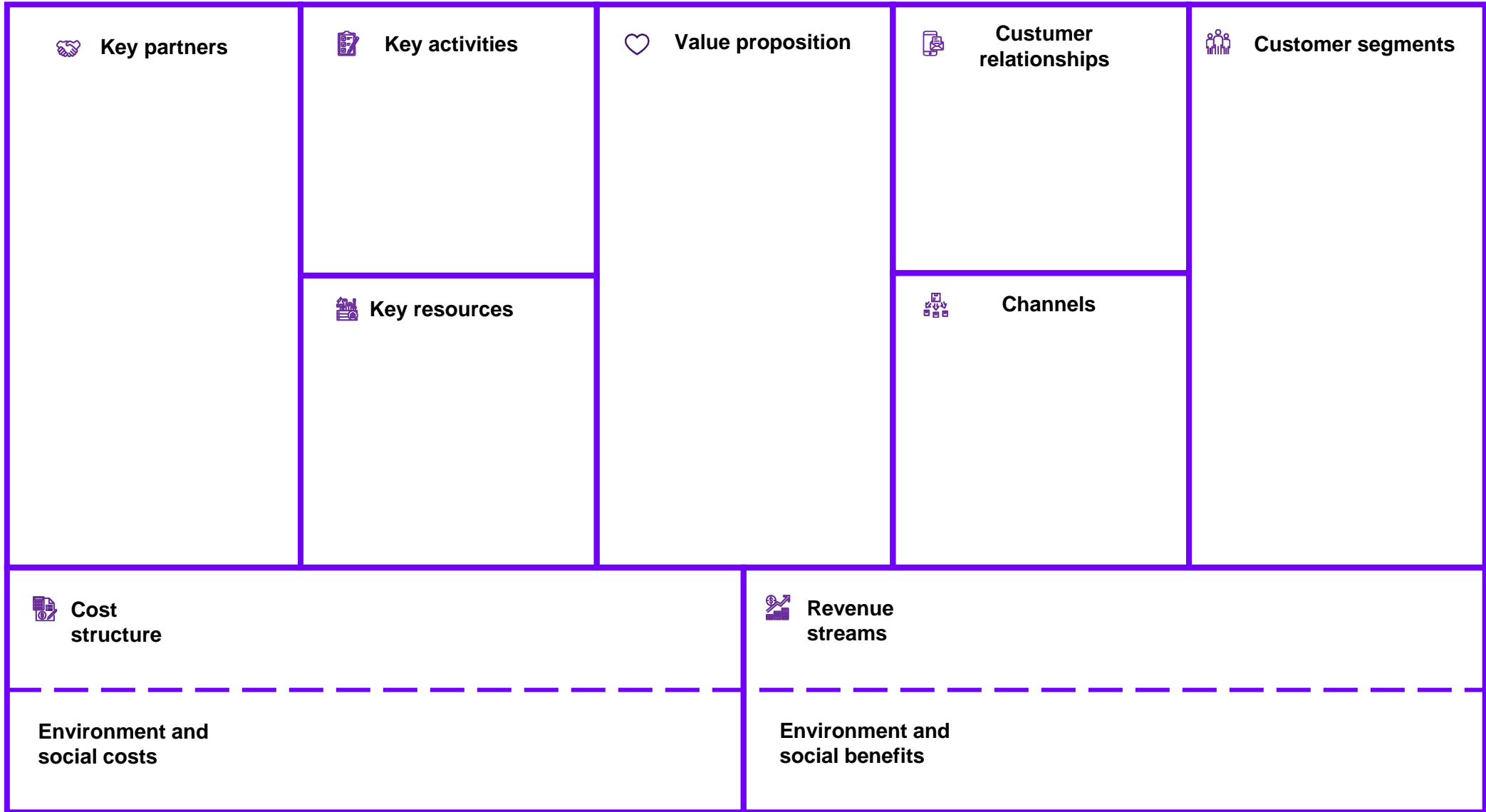
Here's an explanation of each of these elements:

- 1. Customer segments:** This block identifies the specific groups of people or organizations that the business aims to serve. It's important to understand the unique needs and preferences of different customer segments.
- 2. Value proposition:** This element defines the unique value and benefits that the business offers to its customers. It answers the question: "Why would customers choose your product or service over alternatives?"
- 3. Channels:** Channels represent the various ways the business reaches and interacts with its customers. This includes distribution, sales, marketing, and communication channels.
- 4. Customer relationships:** This element outlines how the business establishes and maintains relationships with its customers. It can include aspects like personal assistance, self-service, automated services, and more.
- 5. Revenue streams:** Here, you outline the sources of revenue for the business. This includes the pricing strategies and how customers will pay for the value they receive.
- 6. Key activities:** This block specifies the key tasks and activities the business must perform to create and deliver its value proposition effectively. It may include production, marketing, customer support, and more.
- 7. Key resources:** Key resources are the critical assets and capabilities the business needs to deliver its value proposition. These resources can include physical assets, intellectual property, human resources, and more.
- 8. Key partners:** In some cases, businesses may rely on key partners to help them optimize and deliver their value proposition. This block identifies such strategic relationships.
- 9. Cost structure:** This element describes the various costs associated with operating the business. It includes both fixed and variable costs, which need to be managed effectively to maintain profitability.

Business Model Canvas - Explained



Business Model Canvas - Template



Sustainable Business Model Canvas

The Sustainable Business Model Canvas incorporates elements related to sustainability, such as environmental and social considerations, that are not explicitly included in the traditional Business Model Canvas.

In this regard, it incorporates the following elements:

1. **Environmental and social benefits:** This element highlights the positive impacts that a business's activities have on the environment and society. It involves identifying and articulating the ways in which the business contributes to environmental protection, social well-being, and community

Lean Business Model Canvas

The Lean Canvas simplifies the model compared to the Business Model Canvas, focusing on key problems, solutions, metrics, unique value propositions, channels, and costs. It's designed for rapid idea validation and doesn't delve into the same level of detail as the Business Model Canvas. This Canvas substitutes some of the other elements of the BMC for the following ones:

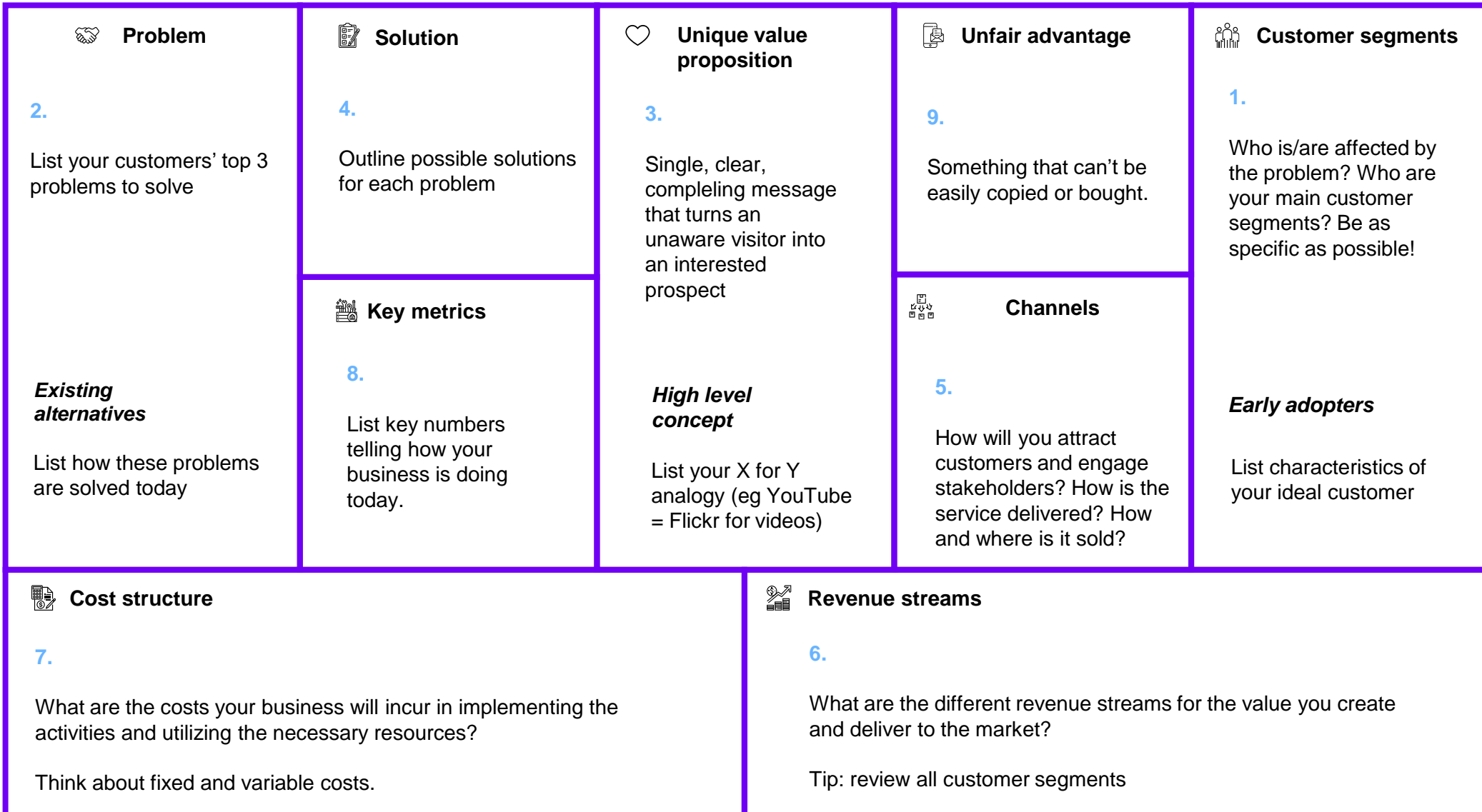
1. **Problem:** Clearly identifying the problem aims to solve.

development. These benefits could include reducing carbon emissions, supporting local communities, promoting fair labor practices, and more.

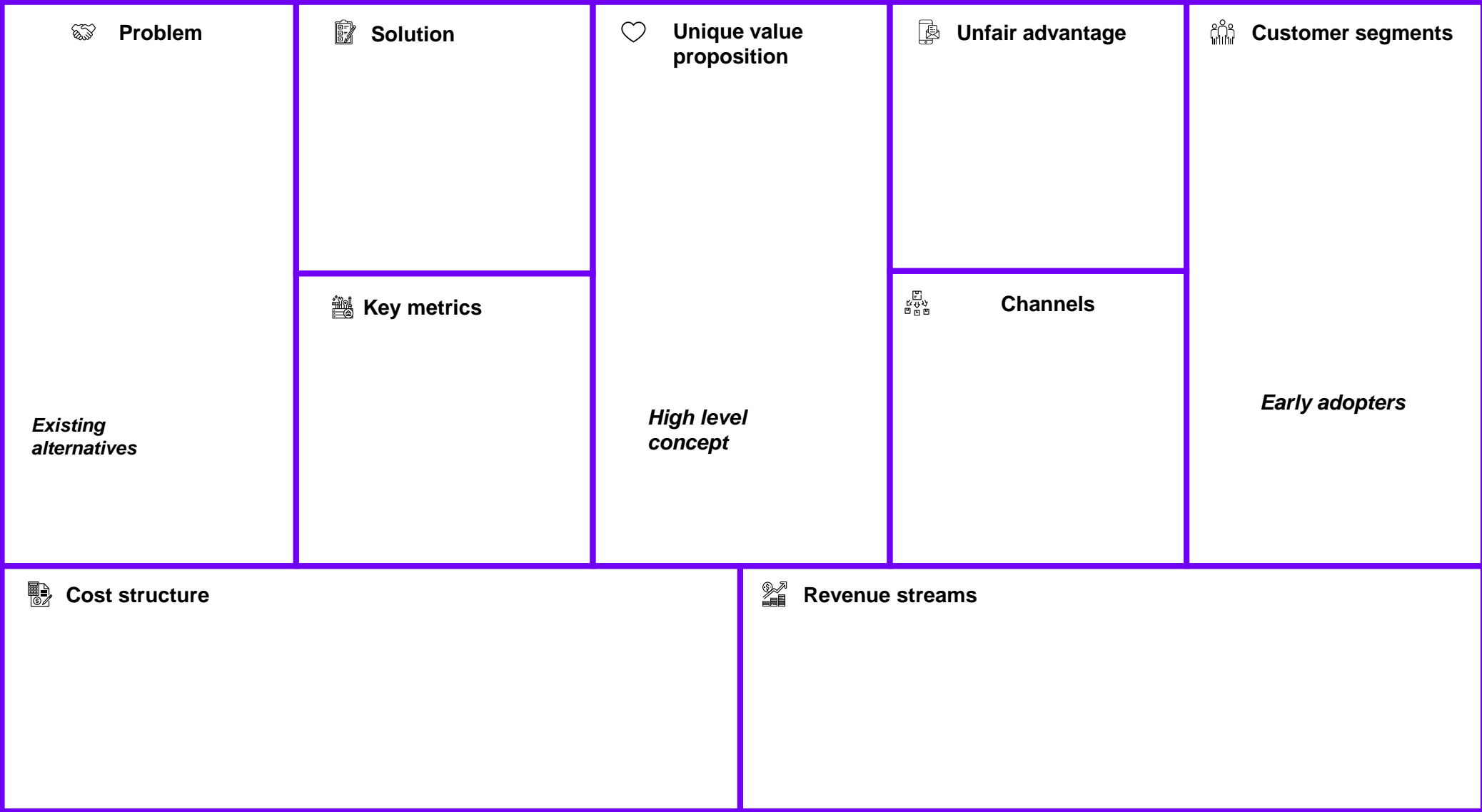
2. **Environmental and social costs:** This aspect accounts for the negative or potentially harmful consequences of a business's operations on the environment and society. It involves acknowledging and quantifying the environmental and social costs associated with the business's activities. These costs might include carbon emissions, pollution, resource depletion, or any harm caused to local communities.

2. **Solution:** Describing the proposed solution that addresses the identified problem
3. **Unfair advantage:** Acknowledging competitive advantages or unique strengths that set the business apart from potential competitors, even if these advantages are not fully realized from day one.
4. **Key metrics:** Identifying a few crucial metrics or indicators that are vital for tracking the startup's progress and validating hypotheses.

Lean Business Model Canvas - Explained



Lean Business Model Canvas



Value proposition canvas

The Value Proposition Canvas is a strategic tool used to design, analyze, and improve a product or service's value proposition. It's an extension of the Business Model Canvas and it focuses specifically on the customer segment and the value your product or service provides to that segment.

Here's an explanation of the key components of the Value Proposition Canvas:

1. Customer Profile (Right Side)

- This side of the canvas focuses on understanding your customer segment better. It helps you identify who your customers are and what jobs they are trying to get done. The Customer Profile includes three key elements:

- **Customer Jobs:** These are the tasks, problems, and needs that your customers are trying to address or accomplish.
- **Pains:** Pains represent the challenges, frustrations, and obstacles your customers face when trying to get their jobs done.
- **Gains:** Gains are the benefits, outcomes, and positive results your customers desire in relation to their jobs.

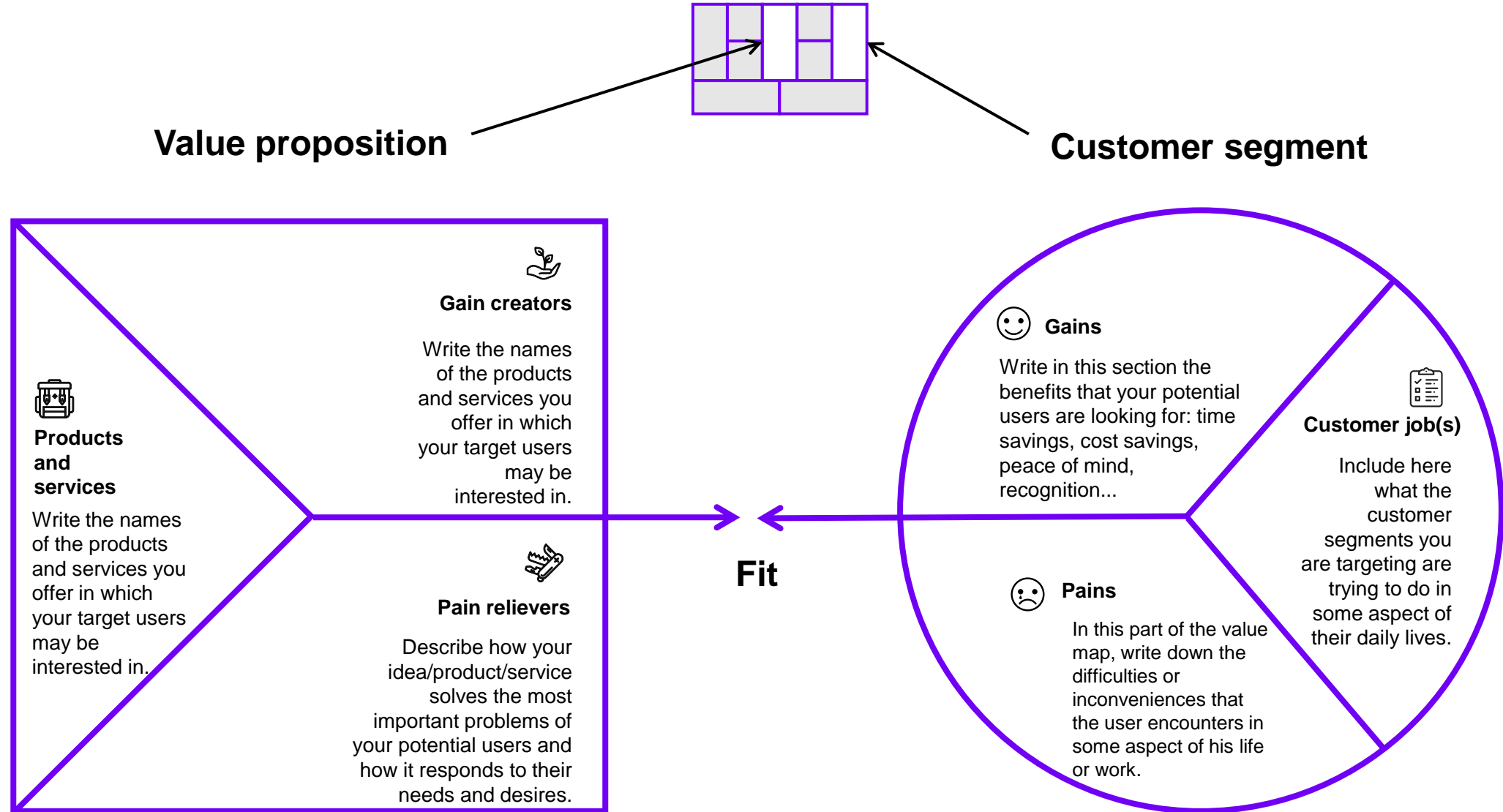
2. Value Map (Left Side):

- This side of the canvas outlines how your product or service addresses the customer's needs, pains, and gains. The Value Map includes two main elements:

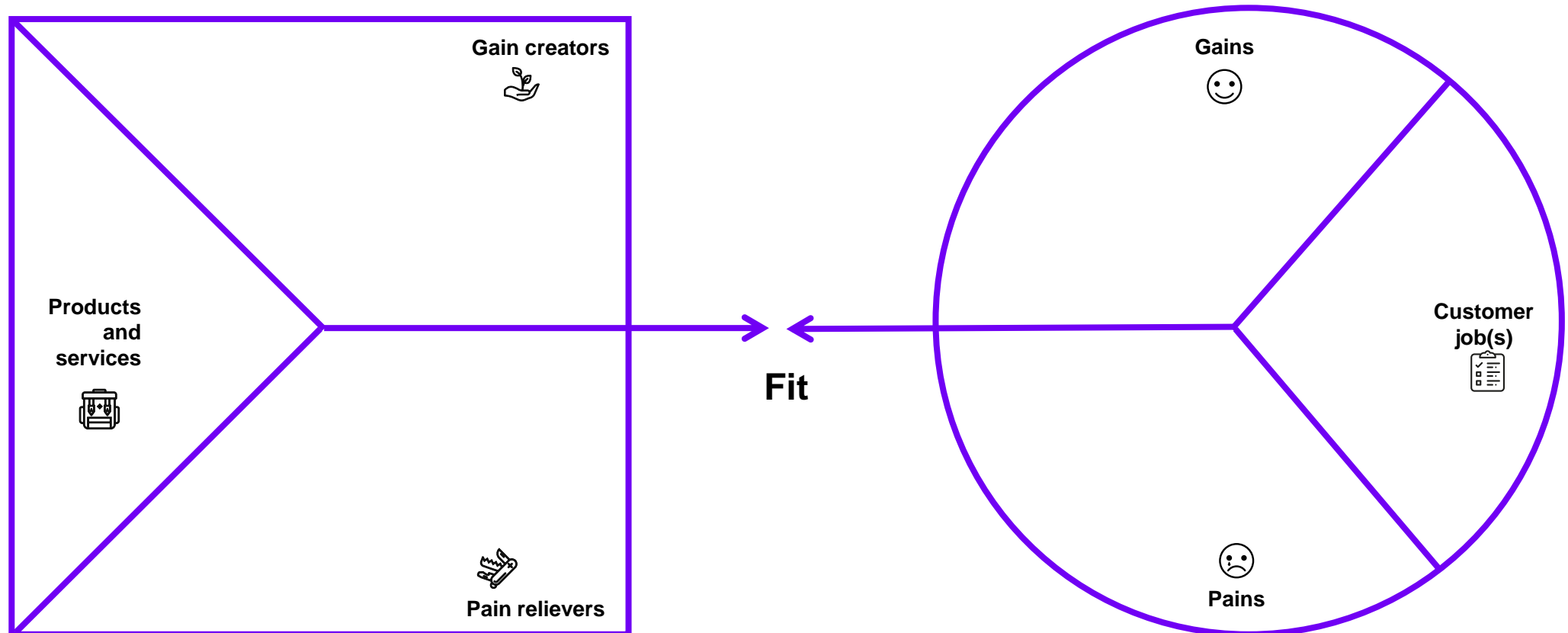
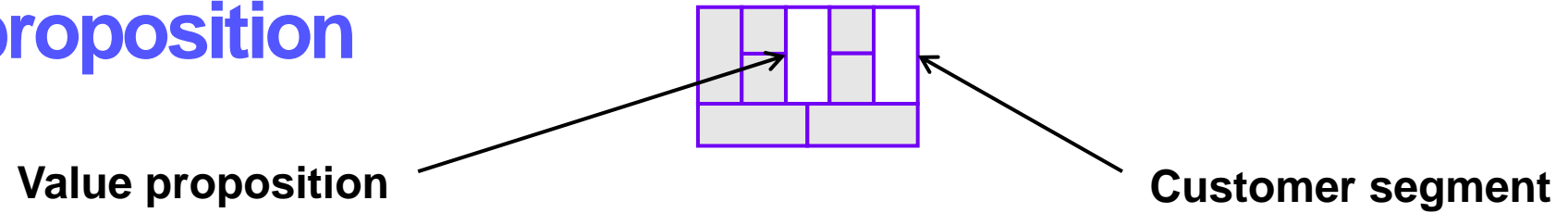
- **Products & Services:** These are the features, solutions, and offerings you provide to address the customer's jobs and alleviate their pains while delivering gains.
- **Gain Creators and Pain Relievers:** Gain Creators describe how your product or service provides benefits that fulfill the customer's gains, while Pain Relievers explain how your offering alleviates the customer's pains.

Ultimately, the Value Proposition Canvas is a powerful tool for product development, marketing, and business strategy, as it allows you to fine-tune your offerings to meet the specific needs of your customers, thereby increasing the chances of delivering a compelling and successful value proposition.

Value proposition canvas



Match your customer with your value proposition

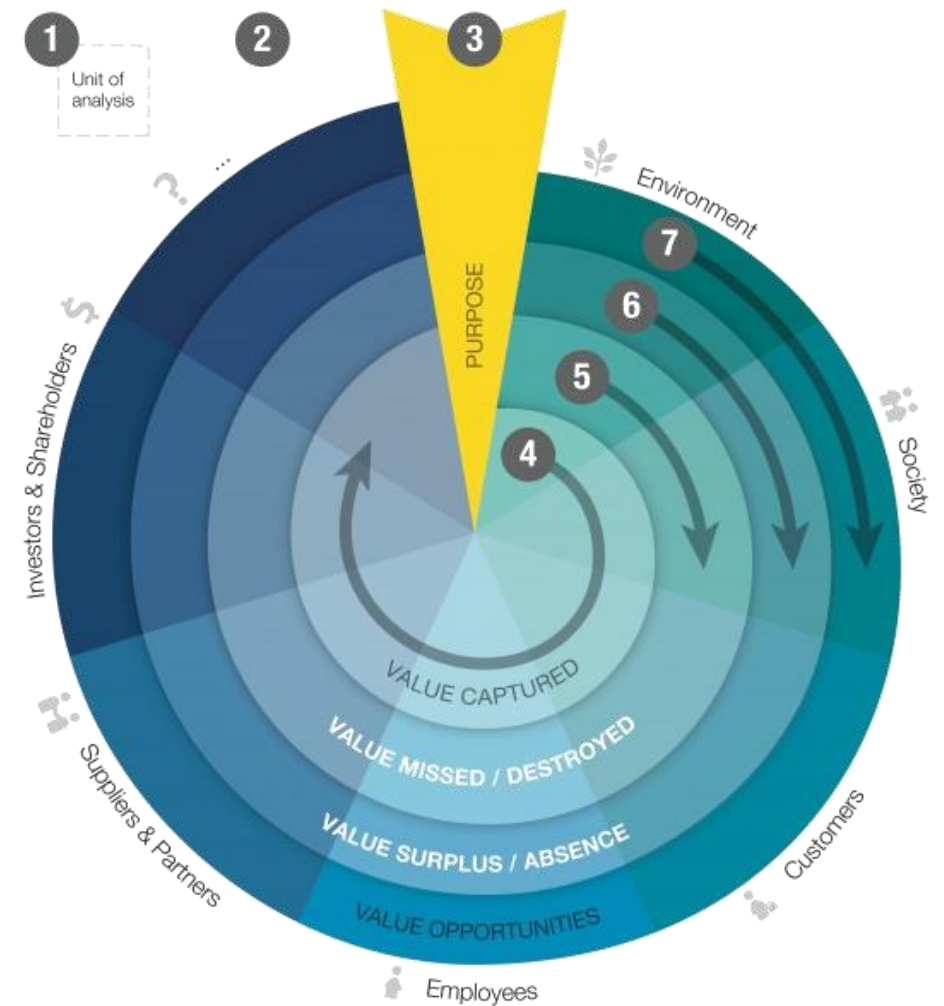


Value Mapping Tool

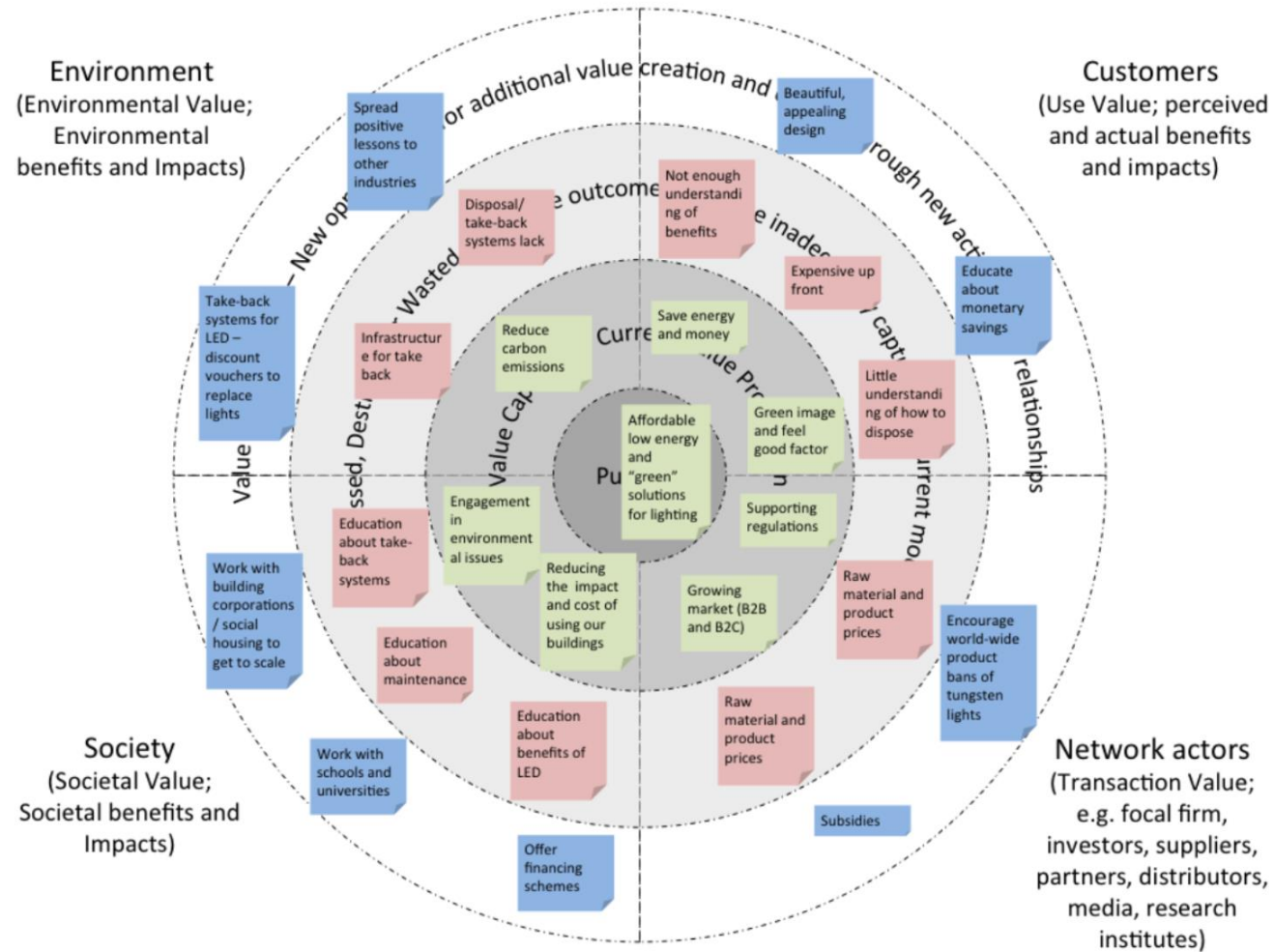
A Cambridge university tool for analyzing the impact of products and services. The Value Mapping Tool is a strategic instrument that visually represents how your sustainable offerings align with customer needs and preferences.

The tool takes you in a guided step-by-step process through the following questions:

1. What is the unit of analysis i.e. product, service, company, industry?
2. Who are the stakeholders for the unit of analysis?
3. What is the purpose of the unit of analysis?
4. What is the current value captured?
5. What is the value missed and/or destroyed?
6. What is the value surplus and/or absence?
7. What are the new value opportunities?

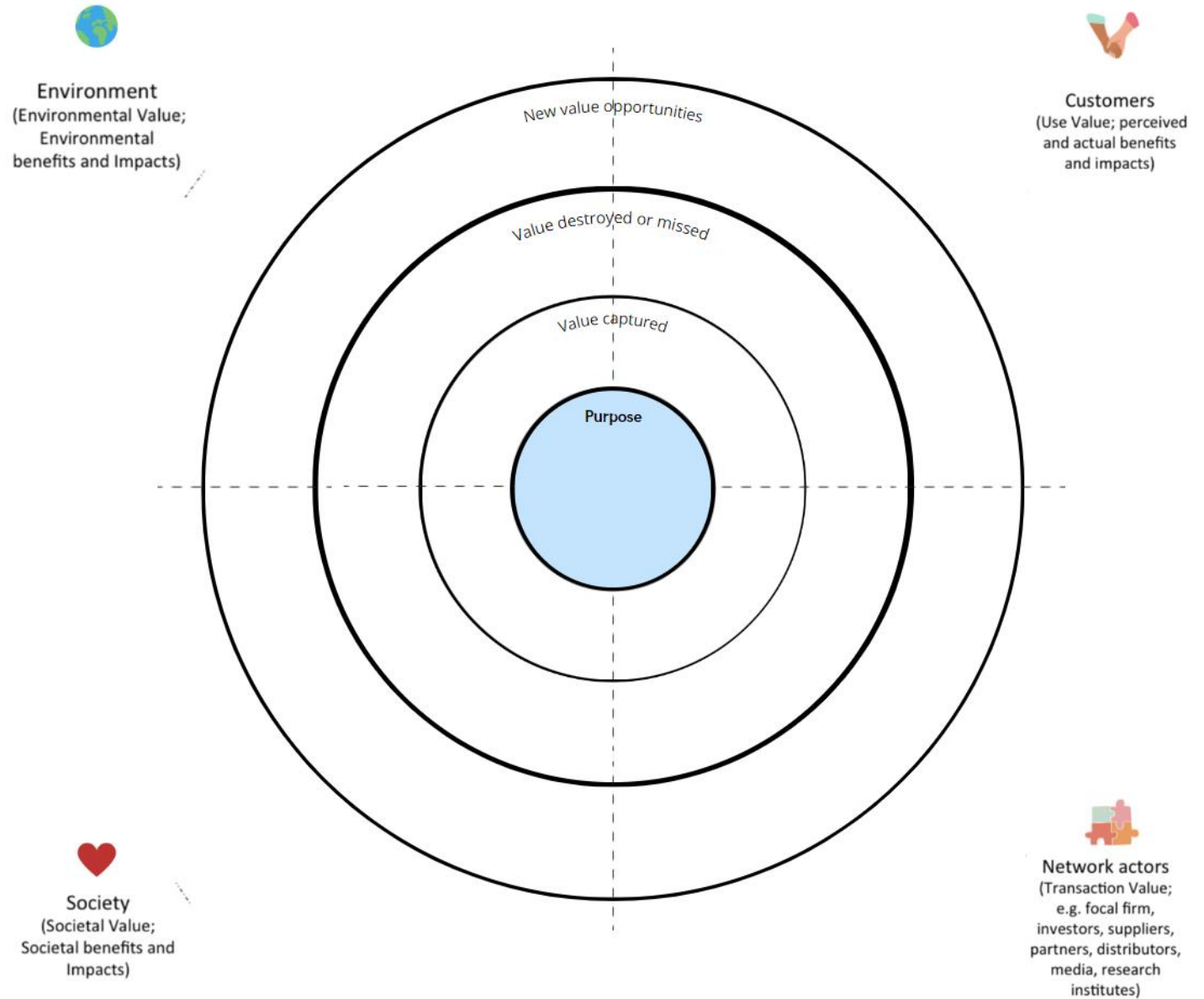


Appendix A. Populated example of the tool for LED lights

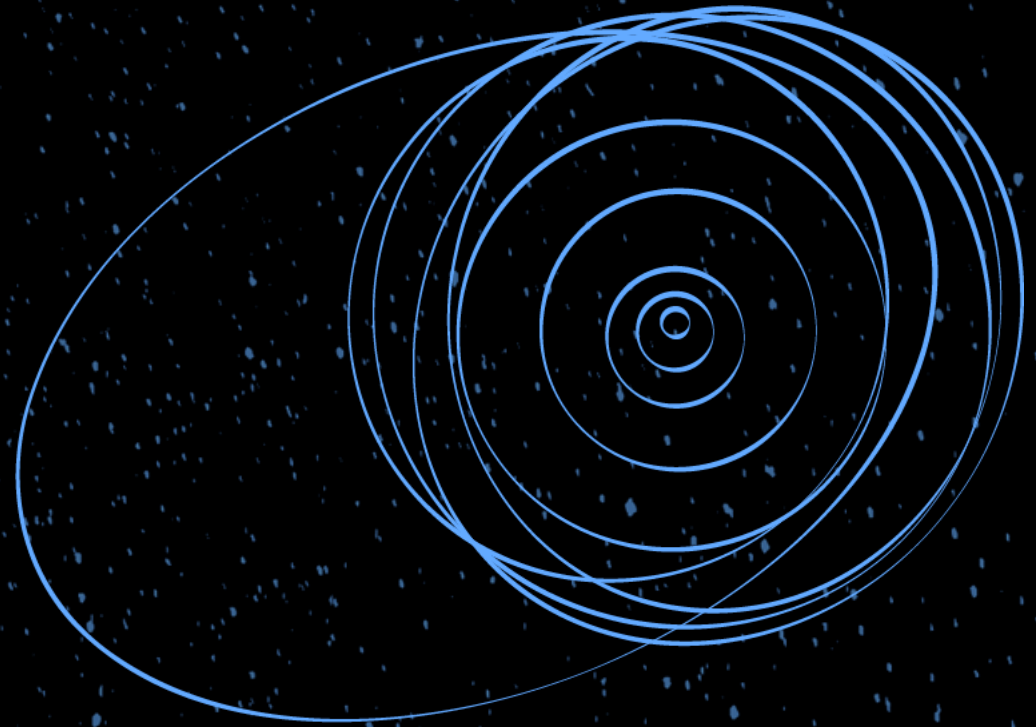


Source: "A value mapping tool for sustainable business modelling" Corporate Governance, Vol. 13 Iss: 5, pp.482 – 497. University of Cambridge.

Value Mapping Tool – simple template



Market Analysis Tools for Informed Decisions



Research and market analysis

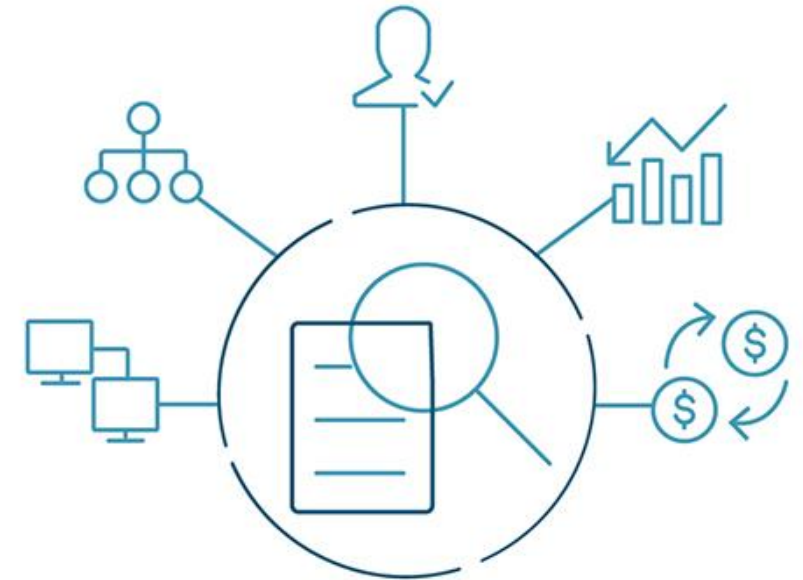
Research and market analysis are foundational steps in crafting a sustainable business model. They provide crucial insights into market dynamics, competition, and opportunities.

Why is it important to do it before launching a business:

1. Identifying market opportunities
2. Understanding the target audience
3. Assessing competition
4. Risk mitigation

Some key tools for research and market analysis are:

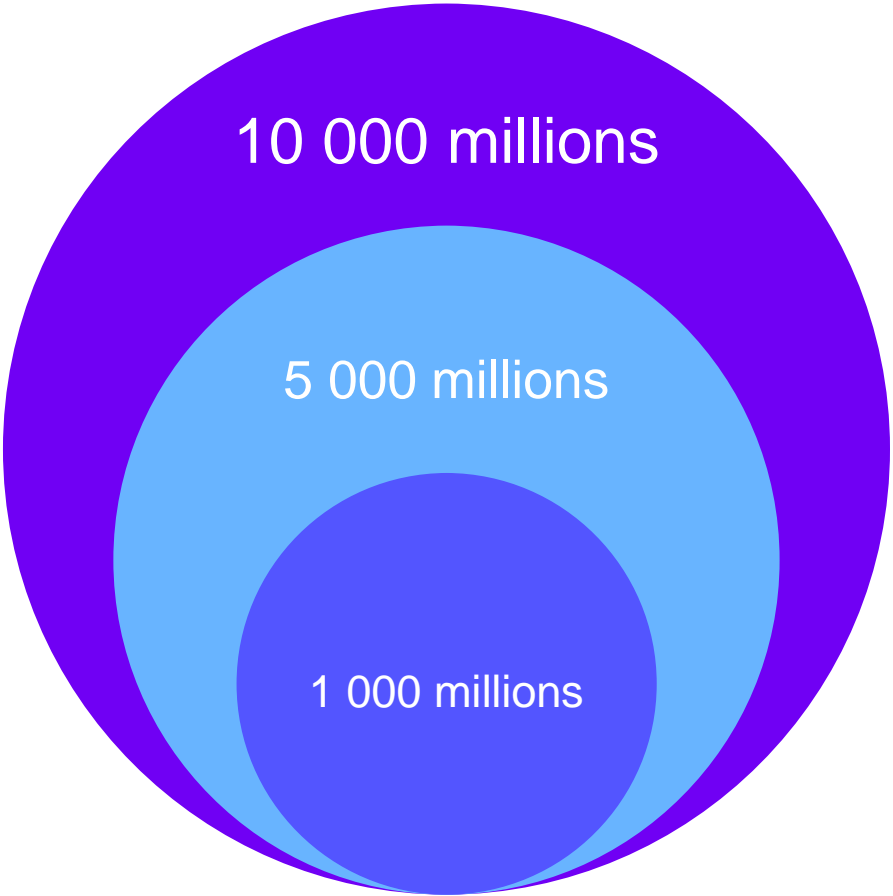
- SWOT and PESTLE Analysis
- Competitor analysis
- Market Size Analysis



How to calculate the market size

	Define your Target Market	Gather Relevant Data	Calculate the Market Sizes	Example
TAM (Total Addressable Market)	Start by defining the total market you are addressing. This includes the entire market demand for your product or service if there were no competitors and no limitations.	For the total market, you'll need to research industry reports, government data, or reliable market research sources to find the overall size of the market.	Simply take the total market size from your research data.	According to market research, the total smartphone app market is valued at \$100 billion annually.
SAM (Serviceable Available Market)	Next, narrow down your target market to a specific segment that your product or service is designed for. This could be based on factors like geography, demographics, or specific customer needs.	To determine the size of the serviceable addressable market, you can use the same sources to identify the relevant portion of the TAM that matches your target market definition.	Based on your target market definition, estimate the portion of the TAM that your product or service caters to.	After narrowing down to the education sector, you find that the education apps market is \$10 billion.
SOM (Serviceable Obtainable Market)	Finally, consider the portion of the SAM that you can realistically capture within a specific timeframe, given your resources, competition, and other market constraints.	Calculating the serviceable obtainable market requires data on your competitors' market share and your expected market penetration rate.	Multiply the SAM by your estimated market share percentage (penetration rate) to get the SOM.	Based on your analysis, you estimate that you can capture 5% of the education app market in the next year, which would be \$500 million.

Market size – Example



TAM, SAM, SOM Analysis

Total Addressable Market (TAM)
10 000 millions

Serviceable Available Market (SAM)
5000 millions

Serviceable Obtainable Market (SOM)
1000 millions

Competitive analysis

Competitive analysis is a critical component of market research, providing insights into the strengths, weaknesses, and strategies of your competitors.

Key steps:

- 1. Identify competitors:** There are three kinds of competitors to consider:
 - *Direct competitors:* offer similar products and services and target the same customers.
 - *Indirect competitors:* offer different products and services and target different clientele but are in the same general category.
 - *Substitute competitors:* offer different products and services but target the same customers in the geographic area.
- 2. Gather information about the competitors:** gather information about the product, pricing, place, promotion, positioning, reputation, people and partnerships.
- 3. Analyze the strengths and weaknesses**

You can evaluate your competitors on a scale of 1 to 10, or by doing a FODA analysis.

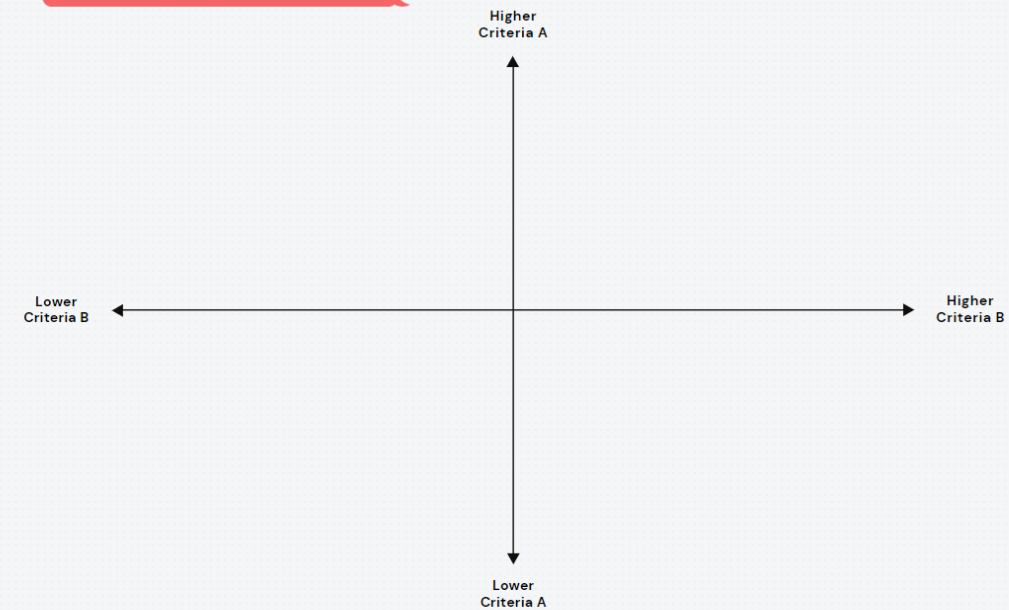
4. Identify your competitive advantage and your place in the market.

You can graphically see how do you position in the market by doing a simple competitive landscape graphic.

Simple competitive analysis

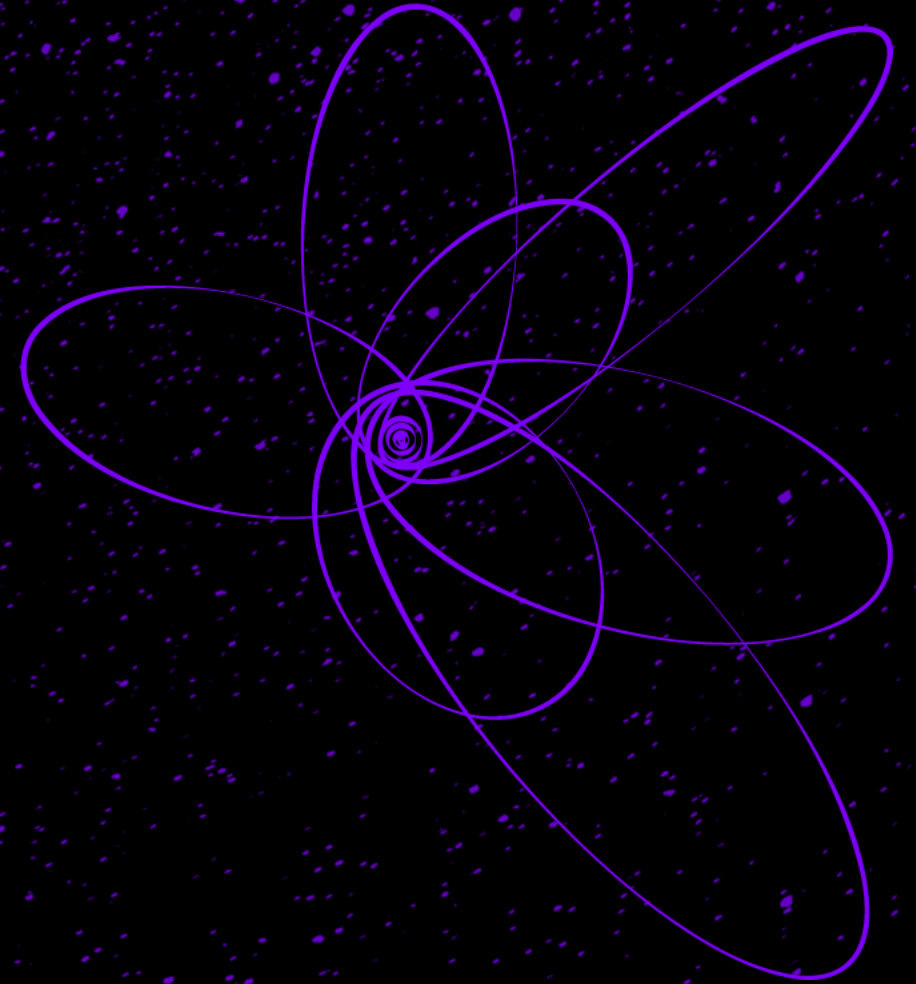
	You	Competitor 1	Competitor 2	Competitor 3
Product quality	9	1	8	5
Pricing	3	4	3	2
Place	3	7	4	8
Promotion	4	7	9	4
Positioning	6	9	7	10
Reputation	4	10	4	8
People	7	3	7	2
Partnership	8	7	8	6

Competitive Analysis



- 1 Choose two of the most representative criteria for your business
- 2 Label each circle with the brands you're comparing.
 - Your brand
 - Competitor A
 - Competitor B
 - Competitor C
- 3 Drag each circle into the grid, estimating where they rank based on Criteria A and Criteria B.

04. Partnering and Funding Needs



Partnering and Funding Needs

This section addresses the crucial aspect of identifying the right partners and securing the necessary funding to support your journey towards a sustainable business model. In today's dynamic tourism industry, collaboration and financial resources are paramount for success.

Network creation

Building networks is essential for any business. A **network** is a group of stakeholders that exchange, coordinate and harmonize ideas and look towards the same goal.

Networks provide room for collaboration and strengthen business connections to provide potential partners for future projects.

To get more of your network you should; get the most in a network you should:

Here, we'll explore techniques and strategies to identify and engage relevant stakeholders, create a financing strategy, build partnerships, and map the resources essential for your triple transition.

Promotion: Make yourself known! Be active promoting your company.

Collaboration: Seek opportunities for cooperation, using your synergies and establish long term partnerships.

Strategies: Find and participate in different projects through networking

Exchange: express demands, opinions and your profile in networking.

Partnering and Funding Needs

Identifying and Engaging Relevant Stakeholders

Stakeholder Mapping:

Stakeholder mapping is a strategic process to identify and analyze the key individuals, organizations, and groups who have an interest in or are affected by your tourism SME's activities.

By understanding and engaging with stakeholders, your SME can build support, address concerns, and ensure that sustainability efforts align with the needs and expectations of all relevant parties.



Partnering and Funding Needs

Some of the tools and techniques that could be used are in order:

- **Stakeholder Identification:** Identify all potential stakeholders, from customers and employees to local communities, suppliers, government agencies, and environmental organizations.
- **Prioritization:** Analyze and prioritize stakeholders based on their influence and interest in your SME's sustainability initiatives.
- **Engagement Strategies:** Develop tailored strategies to engage and involve stakeholders in your triple transition journey.

- **Feedback Mechanisms:** Establish feedback loops for ongoing communication with stakeholders to ensure their voices are heard and concerns are addressed.
- **Collaboration Opportunities:** Identify collaboration opportunities and partnerships that align with you.

Identify Stakeholders

The first step in stakeholder management is **understanding the different stakeholder categories** as they pertain to workforce planning.

Generally, the different types of stakeholders you may come across will fall under three categories:

1. Internal or external
2. Primary or secondary
3. Direct or indirect



Partnering and Funding Needs

Identify Stakeholders

Template to identify stakeholders:

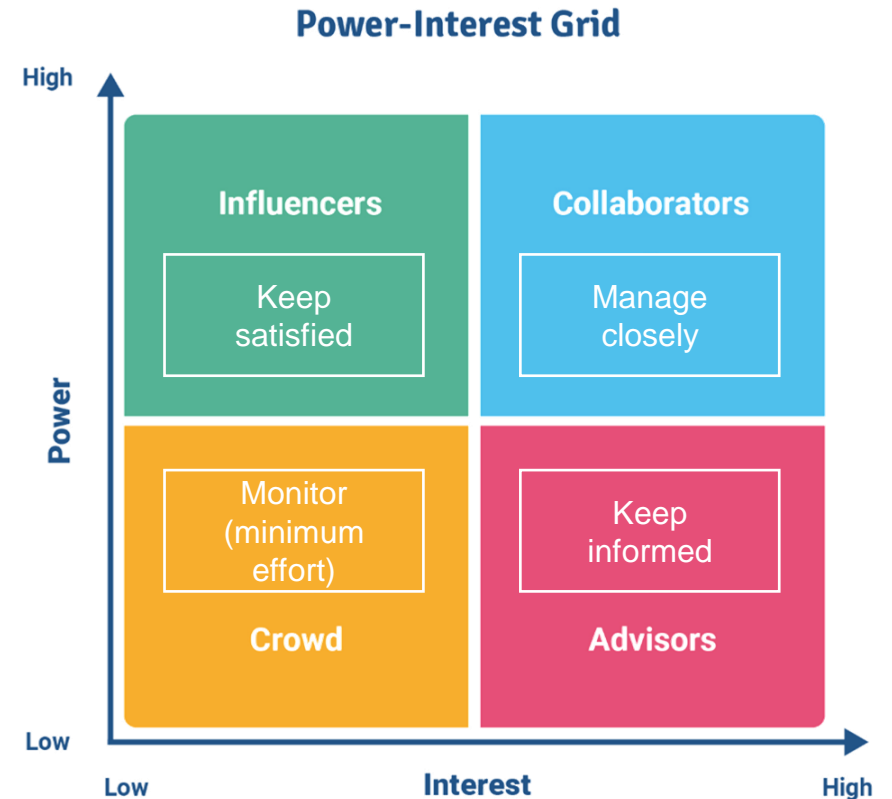
STAKEHOLDER	WHAT ARE THE KEY OBJECTIVES	WHAT ARE THEIR NEEDS	WHAT DO THEY OFFER	WHAT DO I NEED FROM THEM	WHAT CAN I OFFER TO THEM

Partnering and Funding Needs

Prioritize stakeholders

Prioritize your stakeholders in terms of who has the most interest, influence and involvement in the project at hand.

- **Collaborators:** They will be the ones you will collaborate with the most, and who should be engaged throughout the project.
- **Advisors:** They can't influence the project itself due to their low power, but they can provide input, insights and ideas.
- **Influencers:** They can have influence over the project, but while you should keep them informed, in general they don't have the interest to be involved directly.
- **Crowd:** You just need to make sure this group is kept informed of the project's progress.



Partnering and Funding Needs

Stakeholder Engagement Plan Matrix

STAKEHOLDER	AREAS OF INFLUENCE/ INTEREST	PROJECT PHASE	STAKEHOLDER MANAGER	ENGAGEMENT APPROACH	ENGAGEMENT TOOLS	FREQUENCY
<i>Stakeholder Name</i>	<i>Areas of influence or interest</i>	<i>Where?</i>	<i>Who is in charge?</i>	<i>How to engage them?</i>	<i>Which tools to use?</i>	<i>How often?</i>
...
...
...

05. Capability and Technology Maturity



Capability and Technology Maturity Assessment

The Capability and Technology Maturity Assessment is a strategic evaluation that gauges your tourism SME's readiness in terms of capabilities and technology adoption for sustainable practices.

For this part, it is useful to use tools such as a Capability-Technology Matrix; a strategic tool designed to assess your company's technology and business capabilities. This matrix aids in identifying areas of improvement and opportunities for growth within your tourism SME.

The purpose is to:

- Evaluate the maturity levels of both technology adoption and business capabilities.
- Pinpoint strengths and weaknesses to inform strategic decision-making.
- Identify opportunities for enhancement that align with sustainable practices.

The assessment process that should follow is to 1) Gather data on the current state of technology adoption and business capabilities of your SME. 2) Assign scores to each axis and plot the data on the matrix for analysis. 3) Interpret the matrix to identify the quadrant in which each aspect falls. 4) Incorporate it in your roadmap for transition strategy.

The Capability-Technology Maturity Matrix

HIGH TECHNOLOGY, HIGH CAPABILITY Companies that have both high technology and high business capabilities, able to leverage technology to drive business success (e.g. Amazon)	HIGH TECHNOLOGY, LOW CAPABILITY Companies that have high technology but low business capabilities, needing to invest in their business capabilities first (e.g. Uber)
LOW TECHNOLOGY, HIGH CAPABILITY Companies that have high business capabilities but low technology capabilities, needing to invest in their technology capabilities first (e.g. Walmart)	LOW TECHNOLOGY, LOW CAPABILITY Companies that have both low technology and low business capabilities, needing to invest in both their technology and business capabilities to drive business success (e.g. Small Business)

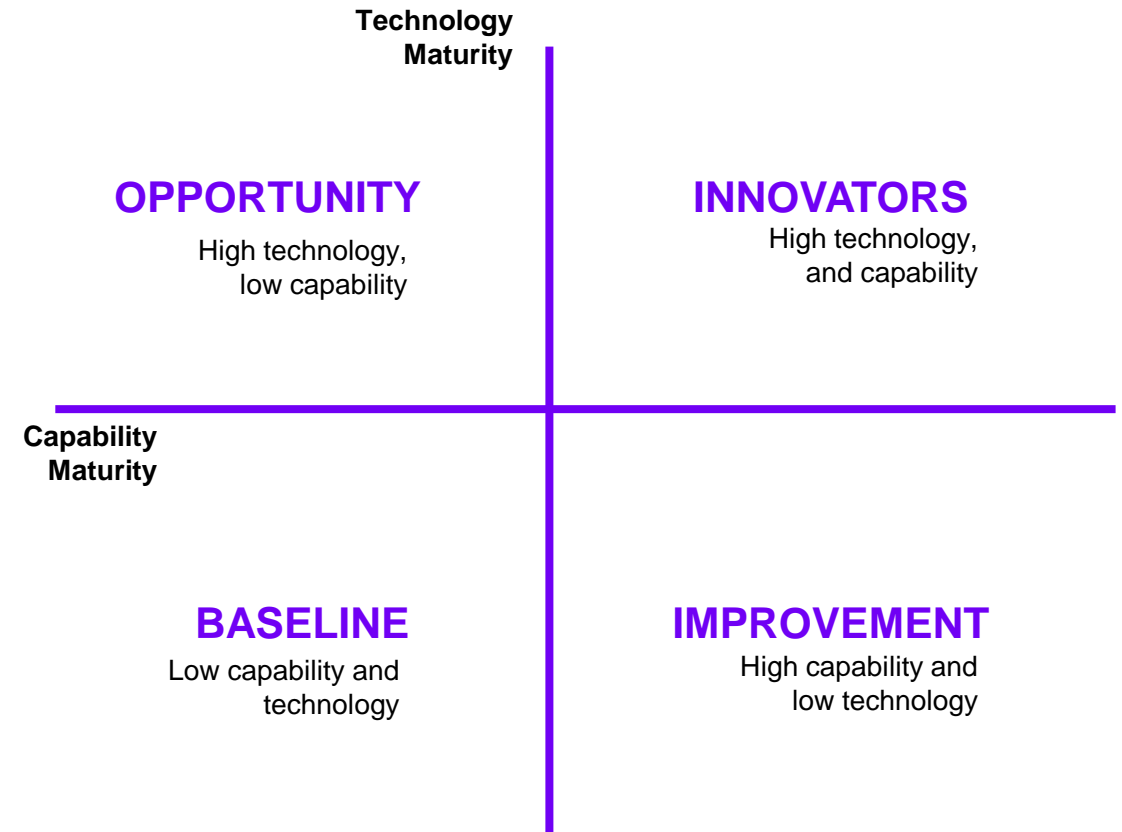
Capability and Technology Maturity Assessment

The axis are:

- **Technology Maturity Axis:** Assess the level of technology adoption within your organization, from basic to advanced.
- **Capability Maturity Axis:** Evaluate the maturity of your business capabilities, covering skills, processes, and resources.

The quadrants that can be identified are:

- **Innovators (Top Left):** High maturity in both technology and capabilities. These are areas of excellence that can serve as best practices.
- **Opportunity (Top Right):** High technology maturity but lower business capability maturity. Focus on enhancing business capabilities to maximize opportunities.
- **Improvement (Bottom Left):** High business capability maturity but lower technology maturity. Invest in adopting advanced technologies to improve overall efficiency.
- **Baseline (Bottom Right):** Lower maturity in both technology and business capabilities. These are areas that require significant attention and improvement.



Resilience Risk Matrix and Contingency Plan

In the dynamic landscape of the tourism sector, resilience is paramount for sustainable success. To thrive in this environment, SMEs need a proactive approach to risk management, and the risk matrix and establishing a contingency plan for the risks is key.

Steps needed:

- Identify Potential Risks: Conduct a thorough assessment to identify potential risks that could impact your tourism SME. Consider both internal and external factors.
- Risk Categorization and Prioritization: Categorize risks based on their likelihood and potential impact. Prioritize them to focus on the most critical areas that require immediate attention.
- Develop preventive and responsive strategies for the identified risk as a contingency plan.

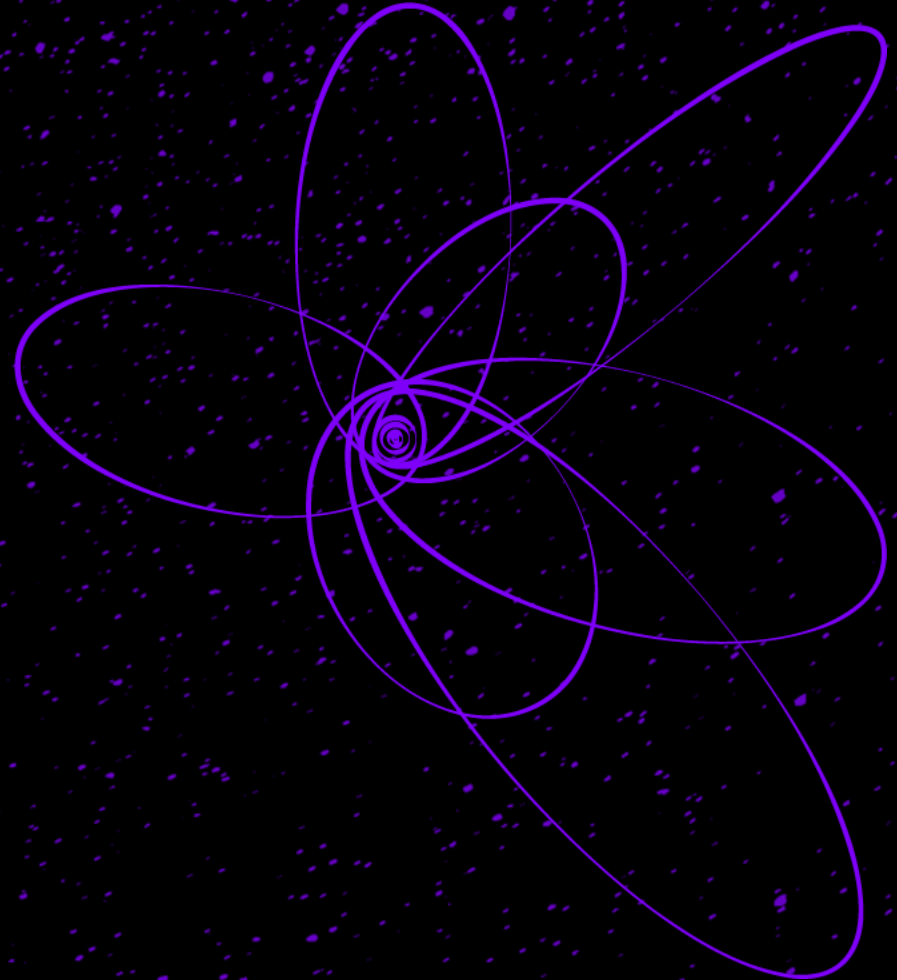
		Impact →				
		Negligible	Minor	Moderate	Significant	Severe
↑ Likelihood	Very Likely	Low Med	Medium	Med Hi	High	High
	Likely	Low	Low Med	Medium	Med Hi	High
	Possible	Low	Low Med	Medium	Med Hi	Med Hi
	Unlikely	Low	Low Med	Low Med	Medium	Med Hi
	Very Unlikely	Low	Low	Low Med	Medium	Medium

Resilience Risk Matrix and Contingency Plan

Contingency plan template

ID/DATE	RISK CLASS	RISK DESCRIPTION	IMPACT DESCRIPTION	PROBABILITY (1-5)	IMPACT (1-5)	PRIORITY (Level of Prob x Impact)	CONTINGENCY PLAN STRATEGY	TRIGGER POINTS	END PLAN TRIGGER	ACTIONS
XXX	Type of risk (Contract, regulation, financial...)	Description	Description of impact	1 low probability 5 high probability	1 low impact 5 high impact	Prob x impact	Description of preventive/responsive strategies	What triggers the contingency plan scenario?	What triggers the end of the contingency plan	Actions needed (if applicable)

06. Roadmap for Transition



Roadmap for transition

The Roadmap for Transition is your guide to achieving sustainable transformation in your tourism SME. It outlines a strategic path, ensuring a smooth journey through the triple transition process. This roadmap should be developed with the help of the Sustainable Transformation Programme and with the guidance and help of your respective mentor.

Some key components of the roadmap could be:

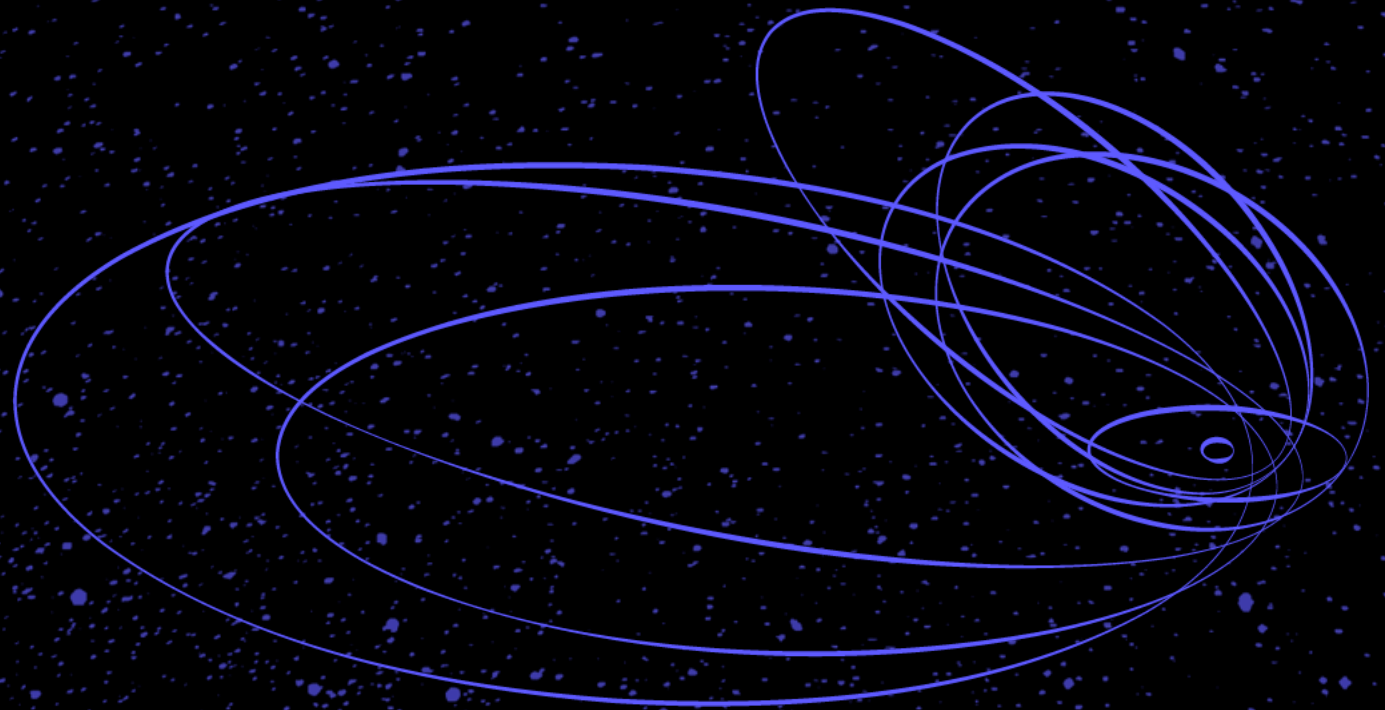
- **Current assessment:** Evaluate your current business model, capabilities, and technology maturity. Identify strengths, weaknesses, and areas for improvement.
- **Goal setting:** Define clear and achievable strategic goals aligned with sustainability principles. These goals will shape your roadmap for the transition.
- **Set your milestones:** Divide the transition into manageable phases. Each phase should have specific objectives, tasks, and milestones for effective execution.
- **Continuous Monitoring and Adaptation:** Implement mechanisms for continuous monitoring of progress. Be ready to adapt the roadmap based on evolving circumstances and feedback.

Also have in mind that the roadmap should; align with Business Model Development:

Ensure that the roadmap aligns with the sustainable business model developed earlier. The transition should reflect the principles and goals established.

Consider the roadmap in tandem with partnering and funding needs. This integration ensures a comprehensive approach to sustainability and growth.

07. Monitoring framework



Monitoring Framework

A robust Monitoring Framework is essential for tracking and evaluating the progress of your tourism SME on the journey of sustainable transformation. It provides insights, identifies areas for improvement, and ensures alignment with set goals.

That is why a **monitoring tool has been** created in order to align and measure metrics that will serve as benchmarks for success for your company.

You should enter your SMEs KPIs into the monitoring tool:

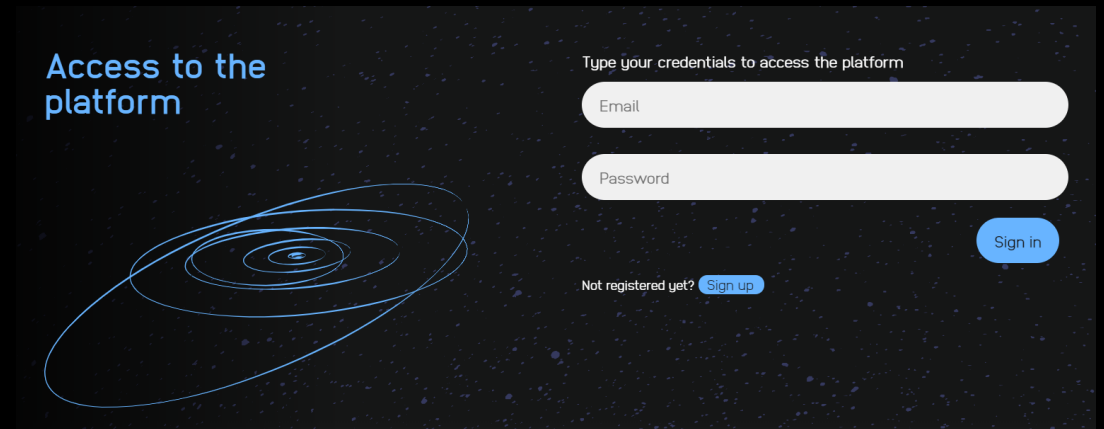
<https://lookupthesky.eu/monitoring-tool/>

Signing up and signing in

Monitoring Framework Tool

The first time you will access the platform (<https://lookupthesky.eu/monitoring-tool/>) you will need to sign up with a valid email, a password and your organization's name;

- You will then be asked to enter your user's name and password;
- Click the button "Sign in";



Monitoring KPIs

As you sign in, you will enter the Manage KPIs page. This is the main page of the tool, from which you can provide your answers for the mandatory KPIs as well as selecting new ones that fit your specific organization;

- Select one mandatory KPI by clicking on it: all mandatory KPIs are qualitative.
- Select Yes/No.
 - If you answer is “No”, then simply Click “Back to KPIs” list to continue entering your answers for other KPIs;
 - If your answer is “Yes”, then you will be asked to enter a short text describing how your organization implements the measures/practices indicated by the KPI;
 - in some specific instances, a qualitative KPI can be connected to other KPI/s. In this case, if you answered “Yes”, you will be required to answer also the connected KPI/s simply by pressing the button “Evaluate”

lookUP Jacopo [Data entry](#)

Manage KPIs for "LookUP Monitoring"

30 required, 14 selected [Add a KPI](#) [View evaluations](#)

⚠ You have to add another 16 KPIs to meet the minimum amount of KPIs required for this session.

KPIs list

1 of 2 Session term | 5 days Deadline | 0/14 Evaluated

Show 10 entries

ID	Code	Name	Mandatory	Answered	Remove KPI
4	QL4	Company or organization monitors the use of renewable energy	mandatory		Remove
8	QL8	Company or organization monitors solid waste	mandatory		Remove
28	QL28	Company or organization has a written policy to compensate employees fairly and equitably and a system to monitor compliance with this policy	mandatory		Remove
29	QL29	Company or organization has a written sustainability policy	mandatory		Remove
30	QL30	Company or organization has a system to monitor compliance with its sustainability policy	mandatory		Remove
41	QL41	Company or organization has a comprehensive recycling strategy to reduce waste to landfill	mandatory		Remove
43	QL43	Company or organization implements policies for monitoring direct GHG emissions	mandatory		Remove

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Monitoring KPIs

Category: Environmental Management - Subcategory: Energy Model: UNWTO

QL4 - Company or organization monitors the use of renewable energy

Represent a binary measure of whether a company or organization is using and monitoring the use of renewable energy sources, such as solar, wind, or hydro power, as a part of its energy mix. A "Yes" response indicates that the company is actively using and monitoring the use of renewable energy, while a "No" response means the opposite.

Glossary
"Renewable energy" refers to energy sources that are naturally replenished and do not deplete over time, unlike non-renewable sources such as fossil fuels. Examples of renewable energy include solar, wind, hydro, geothermal, and biomass. The use of renewable energy helps to reduce greenhouse gas emissions, decrease dependence on finite fossil fuel resources, and promote a sustainable energy mix.

No Yes

- Selected KPIs Name
- KPIs glossary explaining specific terms
- Yes/No answer

No Yes

[Clear answer](#)

Thank you for your answer!

[Back to KPIs list](#)

No Yes

[Clear answer](#)

Thank you for your answer!

In order to monitor the compliance with our sustainability policy we hold monthly meetings to spot possible deviations

[Save answer](#)

Thank you for your answer!
The evaluation process involves other KPIs, reported in the list below.

Related KPIs

% renewable energy use [Evaluate](#)

Monitoring KPIs

Differently from qualitative KPIs, answering **quantitative KPIs** requires you to report the actual quantitative values for the selected indicator.

Category: Environmental Management - Subcategory: Energy Model: UNWTO

QT13 - % renewable energy use

Quantifies the percentage of total energy used by a company or organization that comes from renewable sources, such as solar, wind, hydro, and bioenergy. This includes both direct use (for example, a solar panel installation on a company's building) and indirect use (such as purchasing electricity from a renewable energy provider).

Formula
$$\left(\frac{\text{Amount of renewable energy used}}{\text{Total energy consumption}} \right) \times 100$$

Reported in the last fully available year (JAN - DEC). If the Amount of renewable energy used in the last period is 0, please don't use this indicator. You may use the indicator "Company or organization currently fosters the adoption and usage of renewable energy" and report "NO" instead.

Amount of renewable energy used *Kilowatt-hour (kWh)*

Total energy consumption *Kilowatt-hour (kWh)*

Value
0

Save answer

Glossary

"Renewable energy" refers to energy resources that are naturally replenished and do not deplete over time, unlike non-renewable resources such as fossil fuels. Examples of renewable energy include solar, wind, hydro, geothermal, and biomass. The use of renewable energy helps to reduce greenhouse gas emissions, decrease dependence on finite fossil fuel resources, and promote a sustainable energy mix. "Last available quarter" simply refers to the most recent three-month period for which data or results are available. It is used to provide current and up-to-date information on a company's performance.

- The formula that is needed to calculate the selected quantitative KPI value;
- The notes reporting important information regarding the data that you have to enter;
- Enter your organization's value for each of the reported fields and press "Save answer".

Monitoring KPIs

Once you're done answering the mandatory KPIs and (connected ones), it is your turn to decide which can KPI suits you best. You'll have to **add and answer at least the number of KPIs needed to reach the minimum KPIs number.**

- **Add non-mandatory KPIs**

In order to add one and more KPIs, you need to go back to the Manage KPIs page;

Click on the button "Add a KPI";

This will prompt a new page with the full list of KPIs available for the LookUP project;

There are quite a few KPIs you can choose from. You can narrow down the KPIs based on your interests. You can do it by proceeding with one or more of the following actions:

- Uncheck the business groups that are not applicable to your SME by clicking on the corresponding checkboxes;
- Search for relevant keywords by using the search bar
- Use the "Category" dropdown menu to select KPIs category that might apply to your organization;
- Once you have selected a KPI category, a new "Subcategory" menu will appear. You can further refine you selection by choosing a relevant subcategory;

Manage KPIs for "LookUP Monitoring"

30 required, 16 selected [Add a KPI](#) [View evaluations](#)

⚠ You have to add another 14 KPIs to meet the minimum amount of KPIs required for this session.

KPIs list

1 of 2 Session term 4 days Deadline 12/16 Evaluated

Show 10 entries Search: _____

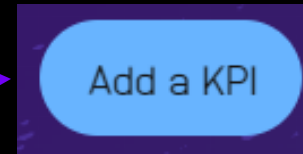
ID	Code	Name	Mandatory	Answered	Remove KPI
4	QL4	Company or organization monitors the use of renewable energy	mandatory	✓	Remove
8	QL8	Company or organization monitors solid waste	mandatory	✓	Remove
28	QL28	Company or organization has a written policy to compensate employees fairly and equitably and a system to monitor compliance with this policy	mandatory	✓	Remove
29	QL29	Company or organization has a written sustainability policy	mandatory	✓	Remove
30	QL30	Company or organization has a system to monitor compliance with its sustainability policy	mandatory	✓	Remove

Monitoring KPIs

Add non-mandatory KPIs

30 required, 14 selected [Add a KPI](#) [View evaluations](#)

⚠ You have to add another 16 KPIs to meet the minimum amount of KPIs required for this session.



Hotels, B&B, Accommodation Providers Tour Operators, Tourist Guides and similar services Restaurants, Food Providers, and similar services Other

Category: Search:

QL100 Company or organization provides its employees with electronic devices
Represents whether the company or organization provides its employees with electronic devices (smartphone/laptops). A "Yes" response means the company provides its employees with electronic devices, while a "No" means it does not.
[Digital Maturity](#) [Digital tools](#)

QL101 Company or organization make use of paid advertisement on the internet
Represents whether the company or organization pays to advertise on the internet. A "Yes" response means the company or pays to advertise on the internet, while a "No" means it does not.
[Digital Maturity](#) [Online presence](#)

QL102 Company or organization collects, analyzes or leverages customer data
Represents whether the company or organization collects, analyzes or leverages customer data to improve its business operations. A "Yes" response means the company collects, analyzes or leverages customer data, while a "No" means it does not.
[Digital Maturity](#) [Online presence](#)

QL103 Company or organization tracks its social media presence
Represents whether the company or organization tracks its social media presence through data directly sourced from social media. A "Yes" response means the company tracks its social media presence. A "No" response means the opposite.
[Digital Maturity](#) [Online presence](#) + 3 linked

QL104 Company or organization tracks its presence on online booking platforms
Represents whether the company or organization keeps track of its presence on booking platforms. A "Yes" response means the company or organization does tracks its presence on online booking platforms. A "No" response means the opposite.
[Digital Maturity](#) [Online presence](#) + 1 linked

QL105 Company or organization accurately monitors guest presence at their facilities
Represent a binary measure of whether a company accurately monitors guest presence (length of stay, nights spent, etc.) throughout the year. A "Yes" response means the company or organization monitors guest presence. A "No" response means the opposite.
[Economic](#) [Seasonality](#) + 4 linked

QL106 Company or organization accurately monitors customers or participants attendance to their offerings
Represent a binary measure of whether a company accurately monitors customers or participants attendance to their offerings throughout the year. A "Yes" response means the company or organization monitors customer attendance. A "No" response means the opposite.

QL108 Company or organization accurately monitors the number of special events (e.g. festivals and conferences) that are held during the shoulder and low seasons
Represent a binary measure of whether a company accurately monitors the number of special events (such as festivals and conferences) that are held during the shoulder

QL109 Company or organization accurately monitors the number of rooms or accommodations open all year
Represent a binary measure of whether a company accurately monitors the number of rooms or accommodations open all year. A "Yes" response means the company does so. A "No" response means the opposite.

Monitoring KPIs

Once you have identified an interesting KPI, simply click on the corresponding card to select it. This will prompt the “answer KPI” page previously described and will allow you to insert your answer/value for the selected KPI.

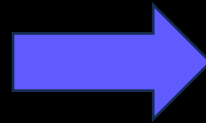
You’ll need to continue the process of choosing non-mandatory KPIs and providing your corresponding answers until you reach the required minimum number of KPIs;

Category: Digital Maturity
Subcategory: Digital tools

QL90 Company or organization sends out e-invoices to its guests or customers

Represents whether the company or organization makes use of electronic invoicing to bill its guests or customers, a "Yes" response indicates the company uses e-invoicing for its guests or customers, while a "No" means it does not.

Digital Maturity Digital tools



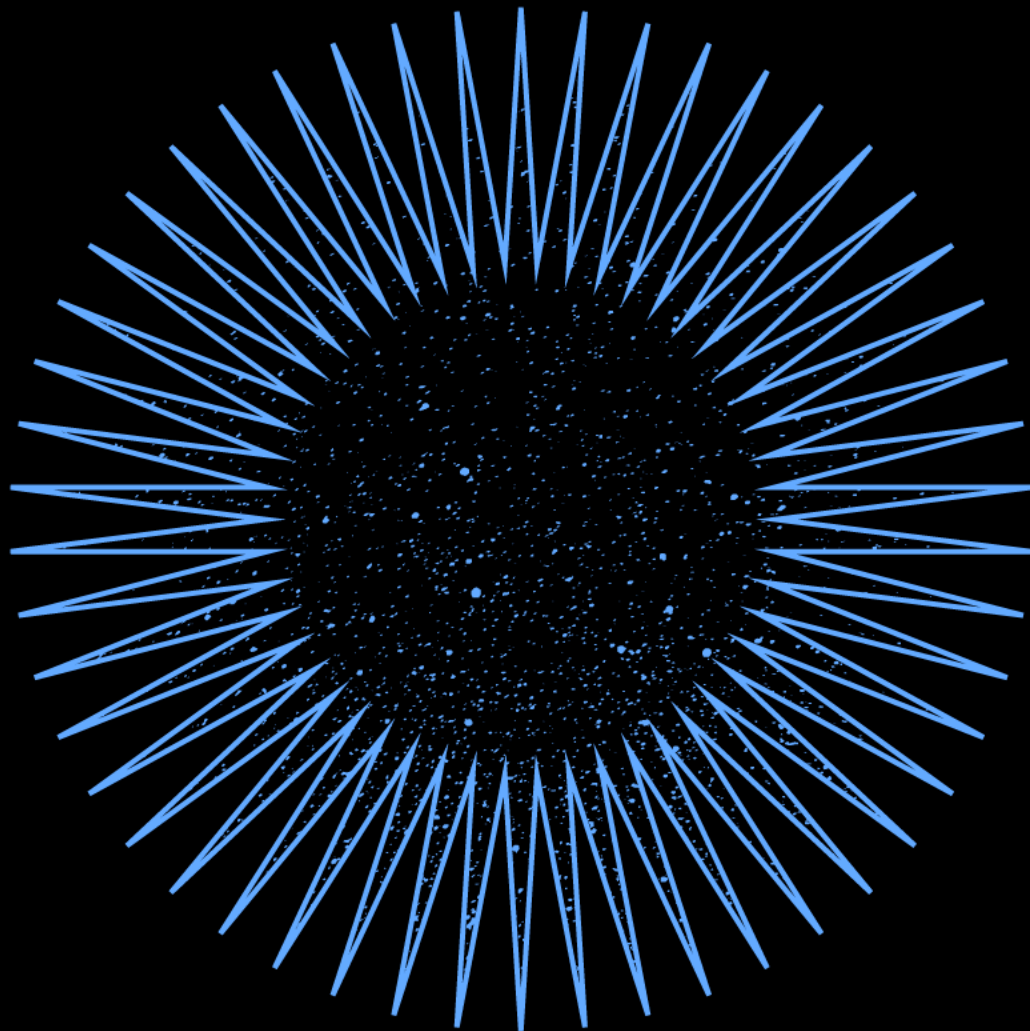
Category: Digital Maturity - Subcategory: Digital tools
Model: Brodny J, Tutak M (2021) Assessing the level of digital maturity of enterprises in the Central and Eastern European countries using the MCDM and Shannon's entropy methods. PLoS ONE 16(7): e0253965. <https://doi.org/10.1371/journal.pone.0253965>

QL90 - Company or organization sends out e-invoices to its guests or customers

Represents whether the company or organization makes use of electronic invoicing to bill its guests or customers, a "Yes" response indicates the company uses e-invoicing for its guests or customers, while a "No" means it does not.

Glossary
Electronic invoicing is the exchange of an electronic invoice document between a supplier and a buyer. An electronic invoice (einvoice) is an invoice that has been issued, transmitted and received in a structured data format which allows for its automatic and electronic processing, as defined in Directive 2014/55/EU. [Source]

No Yes



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