

# Sustainability Assessment Tools & Evaluation of Resilience of SMEs

Katerina Tzitzinou

22.05.2023 | Federation of Industries of Greece



Enterprise Europe Network:  
The world's largest  
support Network for SMEs with  
international ambitions

**Helping ambitious SMEs to  
innovate and grow internationally  
develop more sustainable business models  
build up business agility and resilience**



**3000**

LOCAL  
EXPERTS



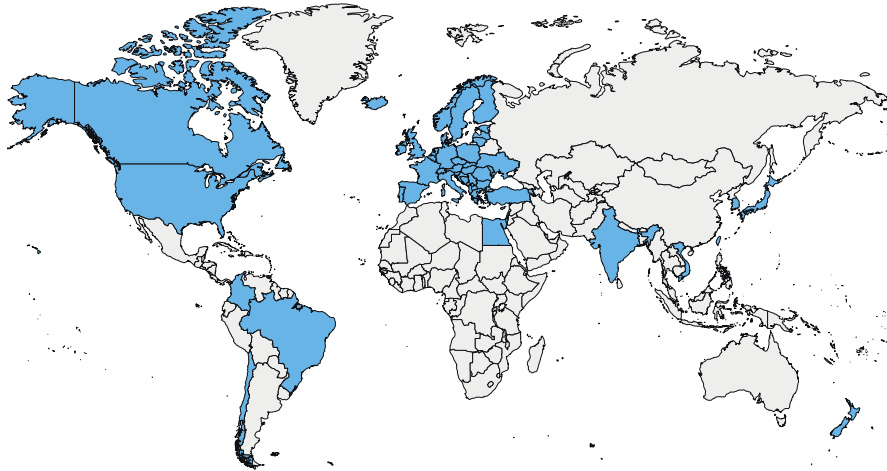
**600+**

LOCATIONS



**60+**

COUNTRIES  
WORLDWIDE



**EU-27**

- ◊ Austria
- ◊ Belgium
- ◊ Bulgaria
- ◊ Croatia
- ◊ Cyprus
- ◊ Czechia
- ◊ Denmark
- ◊ Estonia
- ◊ Finland
- ◊ France
- ◊ Germany
- ◊ Greece
- ◊ Hungary
- ◊ Ireland
- ◊ Italy
- ◊ Latvia
- ◊ Lithuania
- ◊ Luxembourg
- ◊ Malta
- ◊ Netherlands
- ◊ Poland
- ◊ Portugal

- ◊ Romania
- ◊ Slovakia
- ◊ Slovenia
- ◊ Spain
- ◊ Sweden

- ◊ Moldova
- ◊ Montenegro
- ◊ New Zealand
- ◊ Northern Macedonia
- ◊ Norway
- ◊ Serbia
- ◊ Singapore
- ◊ Switzerland
- ◊ Taiwan
- ◊ Türkiye
- ◊ Ukraine
- ◊ United Kingdom
- ◊ United States
- ◊ Vietnam

**International**

- ◊ Albania
- ◊ Armenia
- ◊ Bosnia and Herzegovina
- ◊ Brazil
- ◊ Canada
- ◊ Chile
- ◊ Colombia
- ◊ Egypt
- ◊ Iceland
- ◊ India
- ◊ Israel
- ◊ Japan
- ◊ Korea
- ◊ Kosovo

Disclaimer: Some countries' agreements might still be in process of being signed

# The Network approach

How we help SMEs



## Client-centric

We place the client's needs at the heart of the Network's mission.



## Tailored services

We can tailor our services and provide support to businesses at any stage of their growth path.



## Expertise

The Network's international advisers have the experience and resources to help your business thrive.

# Advice & support

How we help SMEs



# Areas of expertise

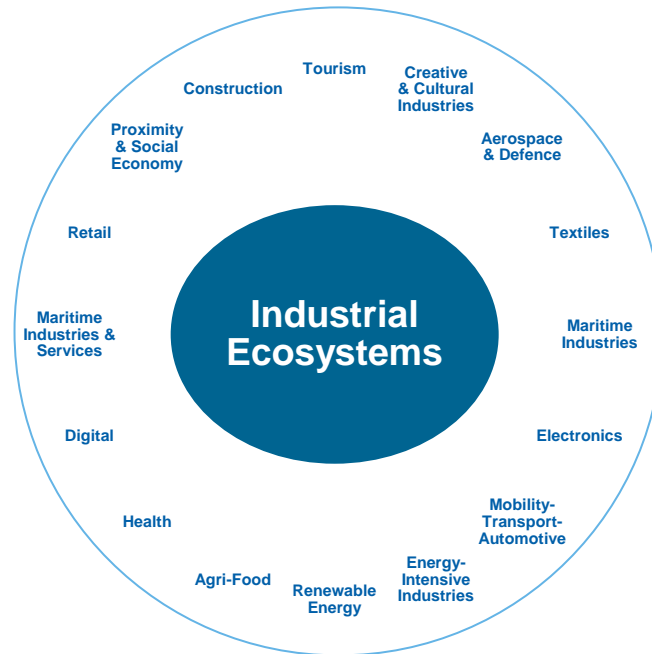
## Sector Groups

- 15 SGs aligned with the industrial ecosystems
- Client-oriented activities
- Connecting with ecosystem stakeholders
- Providing policy feedback



## Thematic Groups

- 10 TGs aligned with the Network activities & priorities
- Network-oriented / capacity building activities
- Connecting with thematic stakeholders
- Providing policy feedback





# Areas of expertise

## EEN Activities & Priorities



Sustainability



Digitalisation



Single  
Market



Research  
and  
innovation



Access to  
finance



Start-ups &  
scale-ups



Network  
performance  
& processes



Communication  
Champions



Internationalisation



Women  
Entrepreneurship

## Sector Groups

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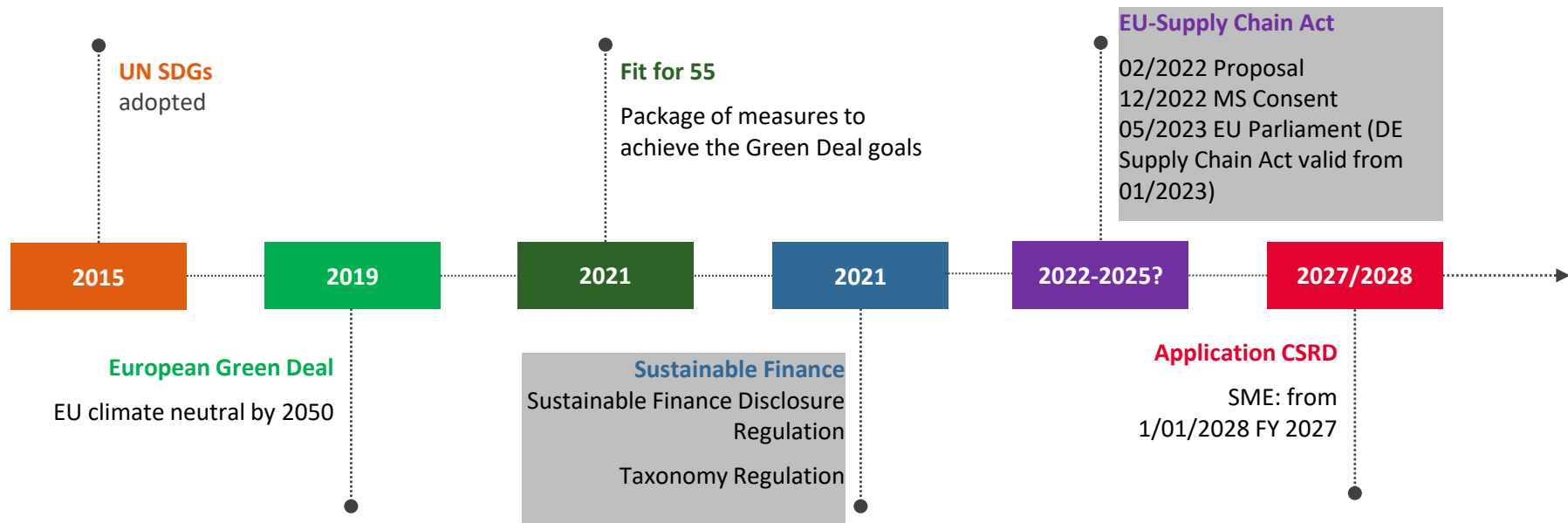
## Thematic Groups

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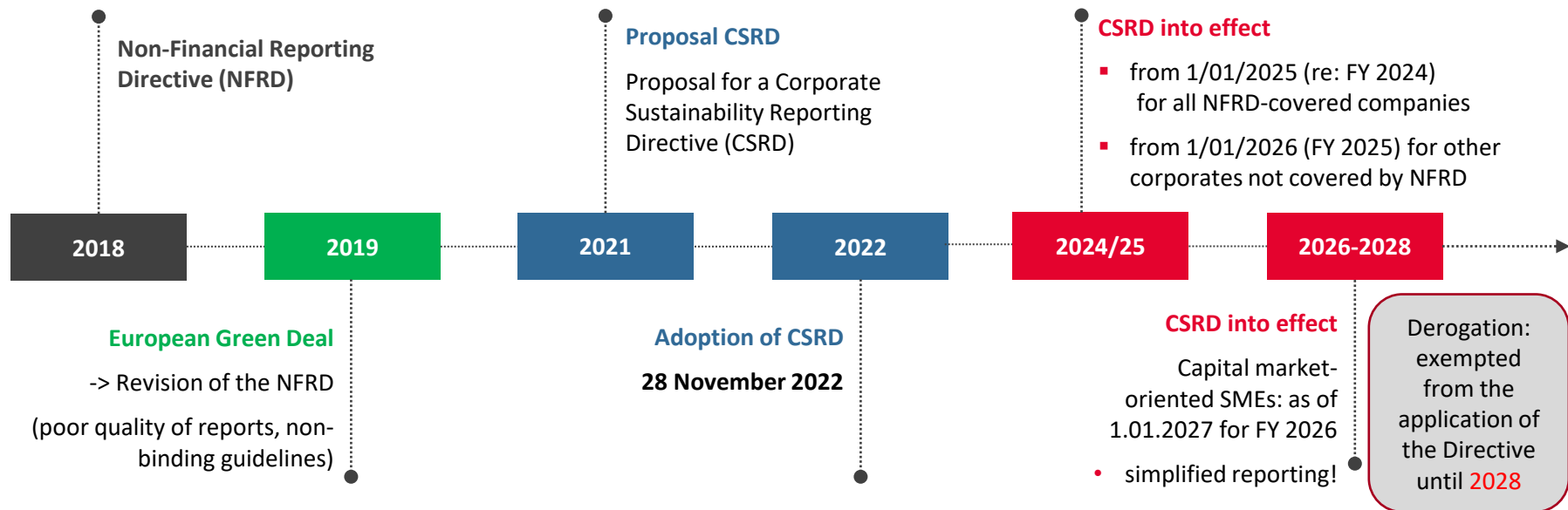




- **How it all began - How is everything connected**
  - Sustainable Development Agenda 2030: UN
  - European Green Deal
    - The first climate-neutral continent by 2050
    - At least 55% less net greenhouse gas emissions by 2030, compared to 1990 levels
    - 3 billion additional trees to be planted in the EU by 2030
  - Fit for 55 package
  - Reporting requirements on sustainable activities
  - Sustainable Finance
  - Supply Chain Act



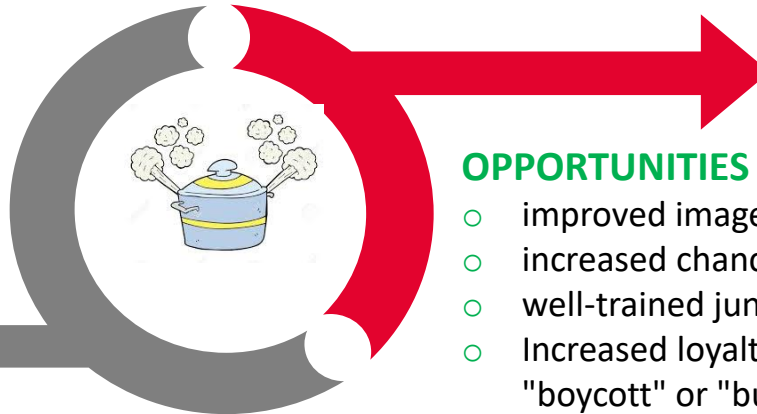
# EVOLUTION OF NON-FINANCIAL REPORTING REQUIREMENTS



## PRESSURE

- Regulations (EU, national)
- Sustainable Finance Agenda of the EU
  - Expectations of customers and business partners
  - Expectations of employees (current, future)
  - "Fridays4Future generation"
- Negative image of **greenwashing** and **wokewashing**

„Sustainability“ as  
criterion to attain funding  
(Horizon, ERDF, national...)



Competitive advantages for SMEs  
through **early stage** market  
positioning and preparation

## OPPORTUNITIES

- improved image
- increased chances of finding well-trained junior staff
- Increased loyalty of employees, no "boycott" or "buycott" by critical consumers
- Investors: increasing compliance with ESG standards - executive compensation

## Sustainability check tool

“Nachhaltigkeits-Check”



**FFG**  
Forschung wirkt.



## Assessment of Resilience of SMEs

“Business FutureProofing Tool”



United Nations  
Educational, Scientific and  
Cultural Organization



**praxi** »  
help-forward network

UNESCO Chair in Futures Research, PRAXI Network, Foundation for  
Research and Technology - Hellas, Greece

## “Nachhaltigkeits-Check”



**FFG**  
Forschung wirkt.



*Business Support on Your Doorstep*



- Developed by members of the Sustainability Group of Austria4SME together with the Free University of Bolzano/Bozen



Tirol Business Consulting and Services



Styrian Business Promotion Agency (SFG)



Upper Austria Business and  
Investment Promotion Agency



Austrian Research Promotion Agency



FREIE UNIVERSITÄT BOZEN  
LIBERA UNIVERSITÀ DI BOLZANO  
FREE UNIVERSITY OF BOZEN · BOLZANO

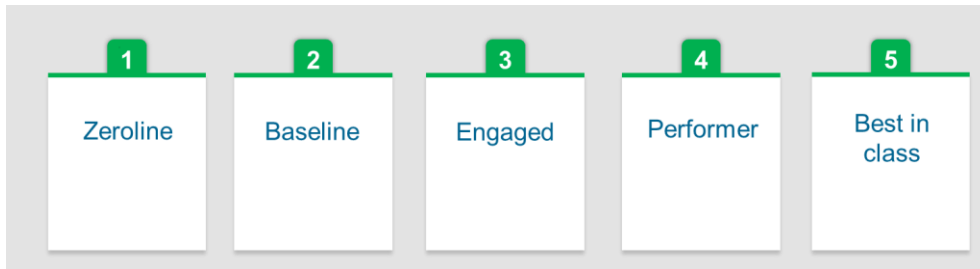


## 1...23: Criteria (Questions)

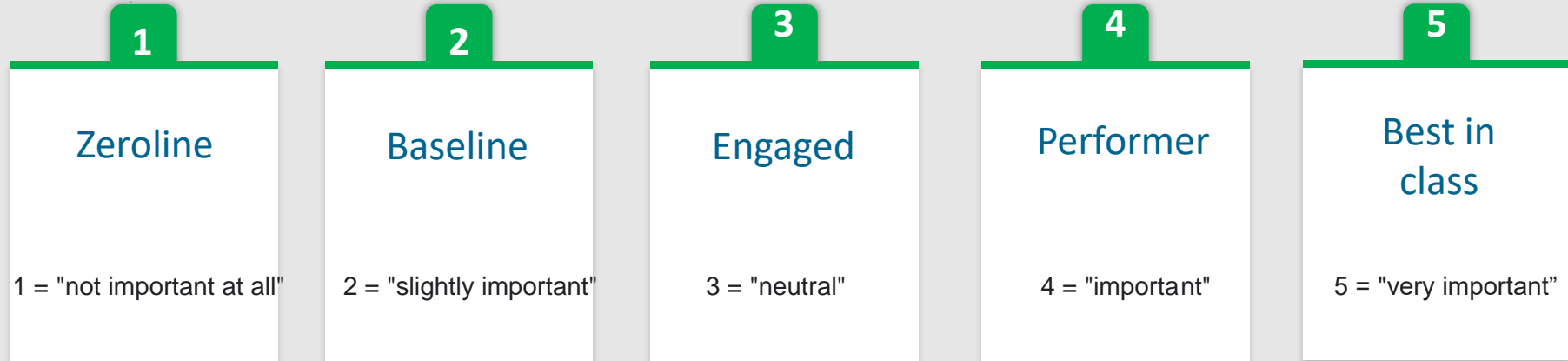


Each criterion:  
5 maturity levels defined

Sustainability dimensions



> Excel based <> webtool in development



Three ratings per question:

1. Status quo <> 2. target level <> 3. importance of the question „prio“ (some use that) OR # of measures to overcome the gap (some use that)

## Economical Dimension

- 1 Market development and growth
- 2 Company purpose
- 3 Innovation management
- 4 Digitalisation
- 5 Resilience towards unforeseen events

## Ecological Dimension

- 6 Reduction of resource consumption
- 7 Waste and resources
- 8 Energy consumption and recovery
- 9 Renewable energy
- 10 CO<sub>2</sub> emission

## Social Dimension

- 11 Education and training
- 12 Involvement of staff
- 13 Diversity / equality
- 14 Inclusion
- 15 Health and workplace safety
- 16 Social commitment

## Management Dimension

- 17 Sustainability strategy
- 18 Sustainable innovation
- 19 Partnerships for sustainability
- 20 Sourcing
- 21 Environmental-Social-Governance (ESG) standards
- 22 Supplier audits and certifications
- 23 Communication of sustainability (internal/external)

# MATURITY LEVEL BASED ASSESSMENT TOOL

## Maturity Levels

| Nr. | SUSTAINABILITY INDICATOR | Maturity Level 1<br>Zero-line   | Maturity Level 2<br>Baseline | Maturity Level 3<br>Engaged | Maturity Level 4<br>Performer | Maturity Level 5<br>Best in Class   | Prio | Firms Score | Firms Target Level |
|-----|--------------------------|---|------------------------------|-----------------------------|-------------------------------|---|------|-------------|--------------------|
|     |                          | <p><b>Maturity Level 1 (Zero Line):</b><br/>The company has not yet made any investments and put in efforts regarding this indicator.</p> |                              |                             |                               | <p><b>Maturity Level 5 (Best in Class):</b><br/>This level is challenging and represents the best concepts regarding the indicator, some of which are not even applied in the industry yet.</p> |      |             |                    |

### Number of Levels

Various Maturity Models such as ISO/IEC 15504-1, have a total of 4 to 6 Levels. Most of examined approaches in literature use 5 levels.

### Designation

Orientated on the literature but named individually for this assessment.

## Indicators & Dimensions

|                 | Nr. | SUSTAINABILITY INDICATOR  | Maturity Level 1<br><i>Zero-line</i> | Maturity Level 2<br><i>Baseline</i>             | Maturity Level 3<br><i>Engaged</i>               | Maturity Level 4<br><i>Performer</i>              | Maturity Level 5<br><i>Best in Class</i>   | Prio | Firms Score | Firms Target Level |
|-----------------|-----|---------------------------|--------------------------------------|---|--|---|--|------|-------------|--------------------|
| <b>Ecologic</b> | 9   | <b>Renewable Energies</b> | No regenerative energy is used.      | Partial use or purchase of regenerative energy. | Purchase of renewable energy and own production. | Mostly own production to cover the energy demand. | Energy self-sufficient through own production and storage of energy as well as feeding energy into the grid. | 4    | 1           | 4                  |

### Economic

1. Market dev. and growth
2. Corporate purpose
3. Innovation management
4. Digitalization
5. Resilience to unforeseen events

### Ecologic

6. Reduction of resource consumption
7. Waste management
8. Energy consumption and recovery
9. Renewable energy
10. CO2-emissions

### Social

11. Training
12. Employee involvement
13. Diversity/equal opportunity
14. Inclusion
15. Health and safety at work
16. Social commitment

### Governance

17. Sustainability Mgmt.
18. Sustainability Strategy
19. Sustainable Innovation
20. Sourcing
21. Supplier audits and certifications on Sust.
22. Partnerships for Sust.
23. Communication of Sust.

## Maturity Levels and Criteria

|                 | Nr.      | SUSTAINABILITY INDICATOR  | Maturity Level 1<br><i>Zero-line</i> | Maturity Level 2<br><i>Baseline</i>             | Maturity Level 3<br><i>Engaged</i>               | Maturity Level 4<br><i>Performer</i>              | Maturity Level 5<br><i>Best in Class</i>   | Prio | Firms Score | Firms Target Level |
|-----------------|----------|---------------------------|--------------------------------------|---|--|---|--|------|-------------|--------------------|
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### Criteria

Selecting a qualitative approach with textual description of the level in order to avoid resource and time intensive data collection.

Usage of company's staff experience in judging the corresponding level

# MATURITY LEVEL BASED ASSESSMENT TOOL

| Score    |     |                          |                                      |   |  |   |  | degree of implementation |             |                    |
|----------|-----|--------------------------|--------------------------------------|---|--|---|--|--------------------------|-------------|--------------------|
|          | Nr. | SUSTAINABILITY INDICATOR | Maturity Level 1<br><i>Zero-line</i> | Maturity Level 2<br><i>Baseline</i>             | Maturity Level 3<br><i>Engaged</i>               | Maturity Level 4<br><i>Performer</i>              | Maturity Level 5<br><i>Best in Class</i>   | Prio                     | Firms Score | Firms Target Level |
| Ecologic | 9   | Renewable Energies       | No regenerative energy is used.      | Partial use or purchase of regenerative energy. | Purchase of renewable energy and own production. | Mostly own production to cover the energy demand. | Energy self-sufficient through own production and storage of energy as well as feeding energy into the grid. | 4                        | 1           | 4                  |

## Priority<>degree of implementation

Shows the Relevance of the Indicator for the company:

1 (“no priority”) – 5 (“highest priority”)

## Firms Score

Shows the current score of the Indicator for the company:

Maturity Level 1 – Maturity Level 5

## Firms Target Score

Refers to the maturity level, the company wants to achieve in the mid-term:

Maturity Level 1 – Maturity Level 5

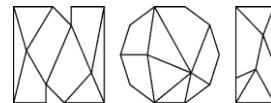
# MATURITY LEVEL BASED ASSESSMENT TOOL



## Sustainability Checkup

Nr. ☰ ☒

|          |   |   |   |   |          |   |   |   |    |        |    |    |    |    |            |    |    |    |    |    |    |    |
|----------|---|---|---|---|----------|---|---|---|----|--------|----|----|----|----|------------|----|----|----|----|----|----|----|
| 1        | 2 | 3 | 4 | 5 | 6        | 7 | 8 | 9 | 10 | 11     | 12 | 13 | 14 | 15 | 16         | 17 | 18 | 19 | 20 | 21 | 22 | 23 |
| Economic |   |   |   |   | Ecologic |   |   |   |    | Social |    |    |    |    | Governance |    |    |    |    |    |    |    |



TECHPARK SÜDTIROL / ALTO ADIGE



- 1 = "No Priority"
- 2 = "Low Priority"
- 3 = "Medium Priority"
- 4 = "High Priority"
- 5 = "Highest Priority"

- 1 = "Maturity Level 1"
- 2 = "Maturity Level 2"
- 3 = "Maturity Level 3"
- 4 = "Maturity Level 4"
- 5 = "Maturity Level 5"

|          | Nr. | SUSTAINABILITY INDICATOR | Maturity Level 1<br><i>Zero-line</i> | Maturity Level 2<br><i>Baseline</i>             | Maturity Level 3<br><i>Engaged</i>               | Maturity Level 4<br><i>Performer</i>              | Maturity Level 5<br><i>Best in Class</i>   | Prio | Firms Score | Firms Target Level | Notes - Ideas |
|----------|-----|--------------------------|--------------------------------------|---|--|---|--|------|-------------|--------------------|---------------|
| Ecologic | 9   | Renewable Energies       | No regenerative energy is used.      | Partial use or purchase of regenerative energy. | Purchase of renewable energy and own production. | Mostly own production to cover the energy demand. | Energy self-sufficient through own production and storage of energy as well as feeding energy into the grid. | 4    | 1           | 4                  | Ideas         |



# INDICATOR EXPLANATION

| Nr. | SUSTAINABILITY CRITERIA                | Maturity Level 1<br>Zero-line                   | Maturity Level 2<br>Baseline   | Maturity Level 3<br>Engaged                        | Maturity Level 4<br>Performer   | Maturity Level 5<br>Best in Class                                   |
|-----|--|---|--|--|---|---|
| 8   | <b>Energy consumption and recovery</b> | We have no energy saving or recycling measures. | There are projects to reduce energy consumption and/or recover energy. | There is systematic and digital energy management. | There are own sustainability projects and investments with the goal of energy recovery. | There are innovative business models to promote energy utilization. |

e.g. baseline activities towards efficient machines and processes; heat recovery

e.g. use of an energy management software; or ISO 50001 certification

e.g. large projects and investments towards recovery of energy

e.g. collaboration of companies in an industrial zone to use collectively heat waste

# INDICATOR EXPLANATION

| Nr. | SUSTAINABILITY CRITERIA  | Maturity Level 1<br>Zero-line                                  | Maturity Level 2<br>Baseline                    | Maturity Level 3<br>Engaged   | Maturity Level 4<br>Performer                                     | Maturity Level 5<br>Best in Class                                  |
|-----|--------------------------|--|---|---|---|--|
| 16  | <b>Social Commitment</b> | No social projects, clubs, charities or similar are supported. | Support for individual projects and activities. | Local associations and cultural projects receive long-term support. | Promotion or participation in charitable or social organizations. | Investing a significant portion of the profits in social projects. |

e.g. sponsorship for events

e.g. promotion of  
football club, music  
band, theater

e.g. workshops for the  
disabled, shelters for the  
homeless, cancer aid

e.g. projects for hospitals or schools in  
developing countries

# INDICATOR EXPLANATION

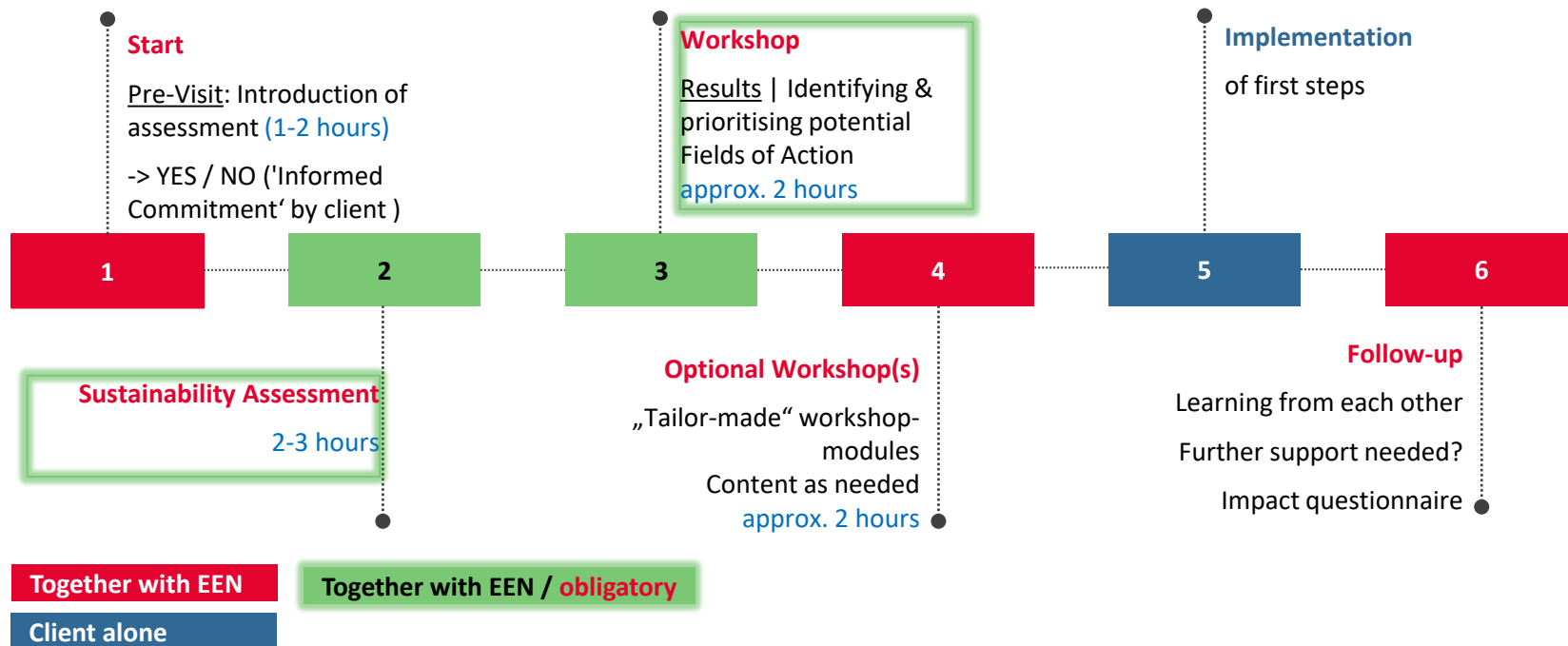
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|-----|---------------------------------------|---|---|--|--|--|
| 19  | <b>Partnership for Sustainability</b> | We currently have no partnerships with the aim of promoting sustainability. | If it arises, we are happy to form partnerships to tackle sustainability challenges together. | We constantly strive to forge partnerships to advance sustainability beyond our specific challenges. | We have involved a wide range of external stakeholders in our sustainability activities. | We are pioneers in sustainability and lead an effective and efficient sustainability ecosystem with a lot of partners. |

e.g. temporary partnership with regional development agencies

e.g. external consulting firm for carbon footprint determination

e.g. cooperation with NGOs, universities and regional/national/international interest groups

e.g. leading role in an ecosystem for sustainability

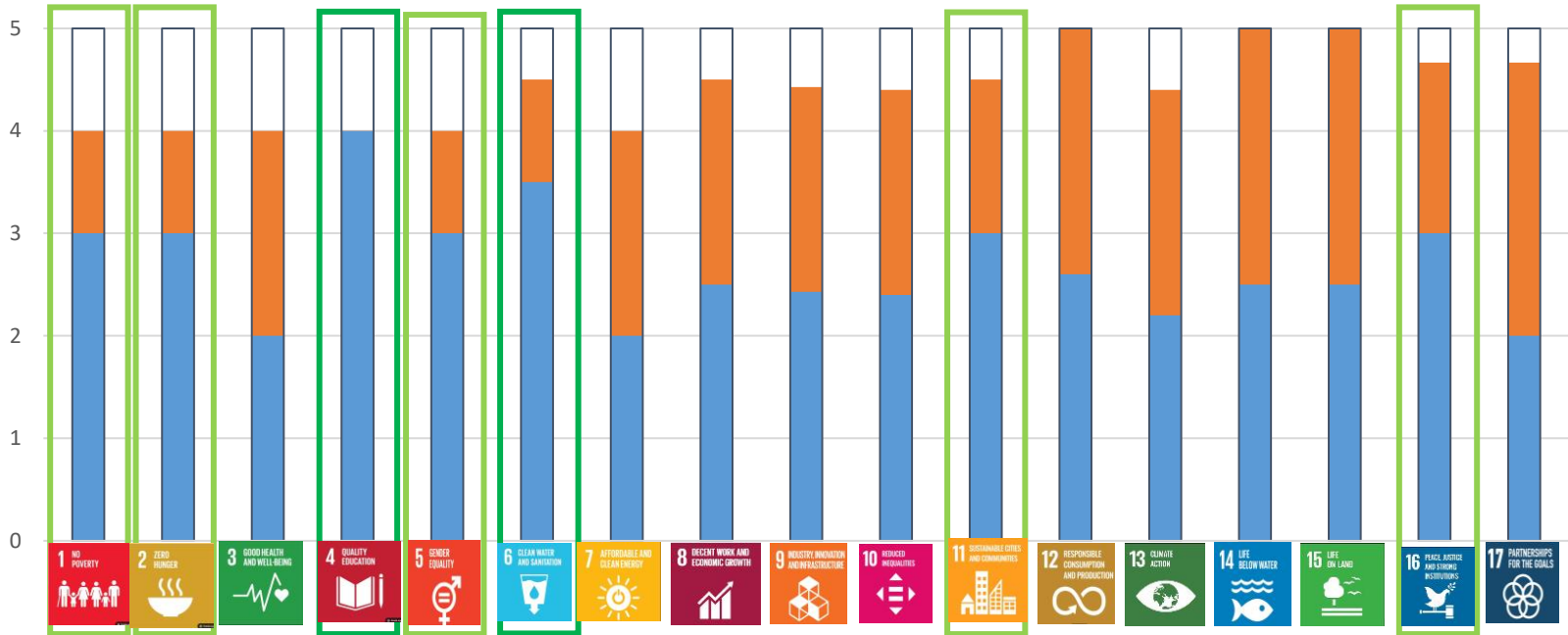


1. Overview of the SDG achievement level
2. Priorities: where does your sustainability potential lie?
3. Gap analysis of the 4 sustainability dimensions
4. Orientation matrix
5. Next steps: Identification and prioritisation of fields of action
6. Where can the EEN support? Next deadline?

# 1. OVERVIEW OF THE SDG ACHIEVEMENT LEVEL

**Legende:**

- Target Value
- Current Value

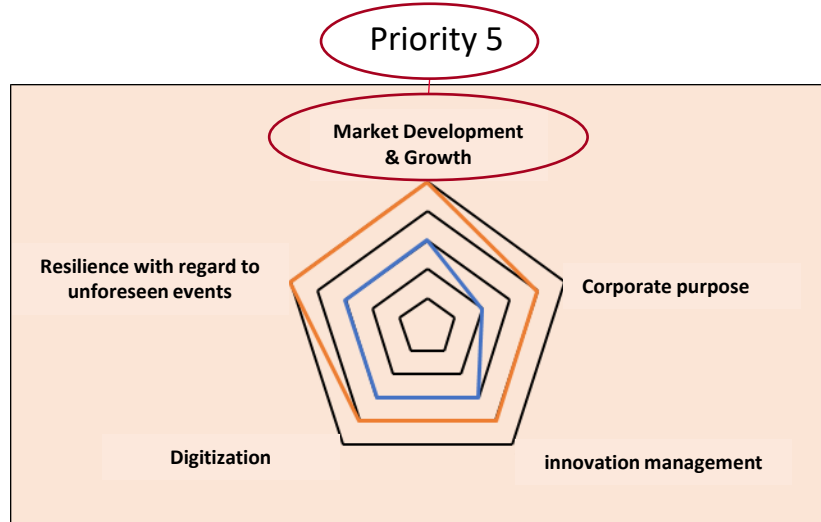


## 2. YOUR PRIORITIES: POTENTIAL ANALYSIS - RANKING OF THE TOP SUSTAINABILITY CRITERIA

| Rang | Sustainability Criteria                              | Sustainability Dimension | Sustainability Potential |
|------|--|--------------------------|--------------------------|
| 1    | Market Development & Growth                          | Economical               | 5                        |
| 2    | Sustainable Strategy                                 | Management               | 5                        |
| 3    | Sustainability Partnerships                          | Management               | 5                        |
| 4    | Communication of Sustainability (Internal/External)  | Management               | 5                        |
| 5    | Corporate Purpose                                    | Economical               | 5                        |
| 6    | Resilience with regard to unforeseen events          | Economical               | 4                        |
| 7    | Employee involvement                                 | Social                   | 4                        |
| 8    | Environmental-Social-Governance (ESG) Standards      | Management               | 4                        |
| 9    | Supplier Audits and Certifications on Sustainability | Management               | 4                        |
| 10   | Innovation Management                                | Economical               | 4                        |
| 11   | Reduction of resource consumption                    | Economical               | 3                        |
| 12   | waste and resources                                  | Economical               | 3                        |
| 13   | CO2 exhaust gases                                    | Economical               | 3                        |
| 14   | Diversity & equal opportunities                      | Social                   | 3                        |
| 15   | Health & Workplace Safety                            | Social                   | 3                        |
| 16   | Sustainable Innovation                               | Management               | 3                        |
| 17   | Sourcing   | Management               | 3                        |
| 18   | Digitization   | Economical               | 3                        |
| 19   | Energy consumption and recycling                     | Economical               | 2                        |
| 20   | Inclusion  | Social                   | 2                        |
| 21   | Social commitment                                    | Social                   | 2                        |
| 22   | Renewable energy                                     | Economical               | 1                        |
| 23   | Education and Training                               | Social                   | 1                        |

Ranking of the sustainability criteria with the highest potential in your company, based on your previous assessment.

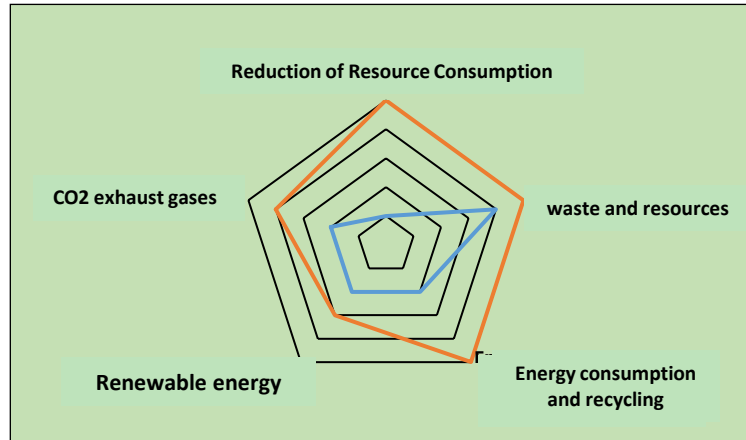
Are all priorities still current??



## Not far to the destination!

- All 5 criteria are 1 or 2 "steps" away from the desired goal (in practice, however, this 1 step can mean a lot of effort).
- Market Development & Growth (Prio 5): ML3: -> ML5: (Gap=2)
- Digitisation (Prio 2) and innovation management (Prio 3): Only 1 "step" away from the target value.
- Resilience (Prio 4): currently ML3

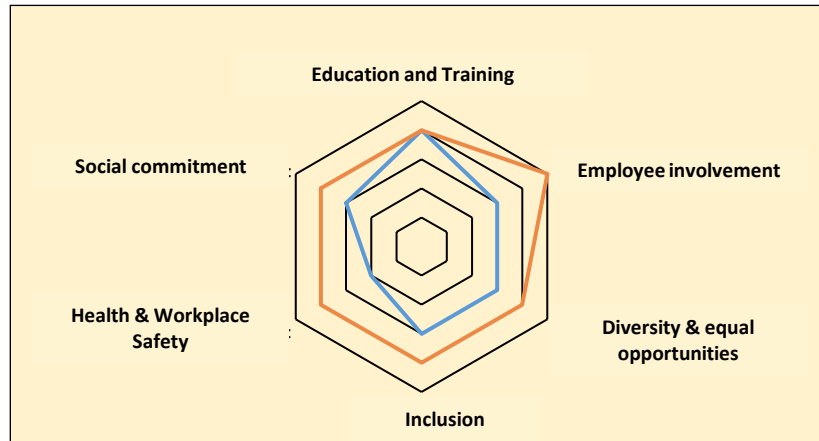




— Current Value  
— Target Value

### Room for improvement in resource and energy consumption

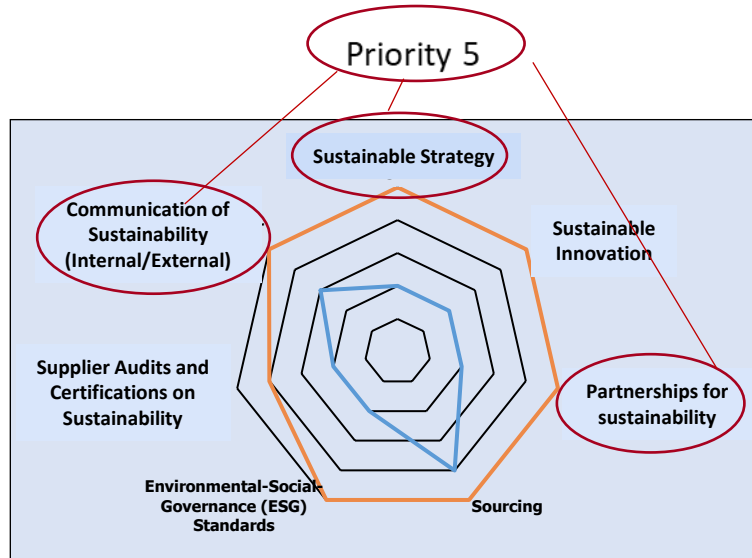
- Priorities with Gap between 1 and 3
- Already very far with **Waste and Resources** (4/5)  
Upcycling; Precycling (almost paperless through digitisation; topic packaging!)
- **Largest gap: Reduction of resource consumption (Prio 3)**: Currently no review, no measures, but a lot of data available; continuous target



— Current Value  
— Target Value

### Employee involvement is important

- Priority 4:  
Employee involvement (Gap = 2)  
Intrapreneurship - long-term existence of the company
- Only 1 step away from the goal in Diversity & equal opportunities, Inclusion and Social commitment
- Goal achieved in Education and Training!



— Current Value  
— Target Value

## Top priority

- Sustainable Strategy  
Gap = 3
- Partnerships for sustainability  
Gap = 3
- Communication of Sustainability (internal/external)  
Gap = 2

# 4. ORIENTATION MATRIX

## Implement

High/very high priority (3-5)  
Low gap between actual & target (0-2)

## Planning

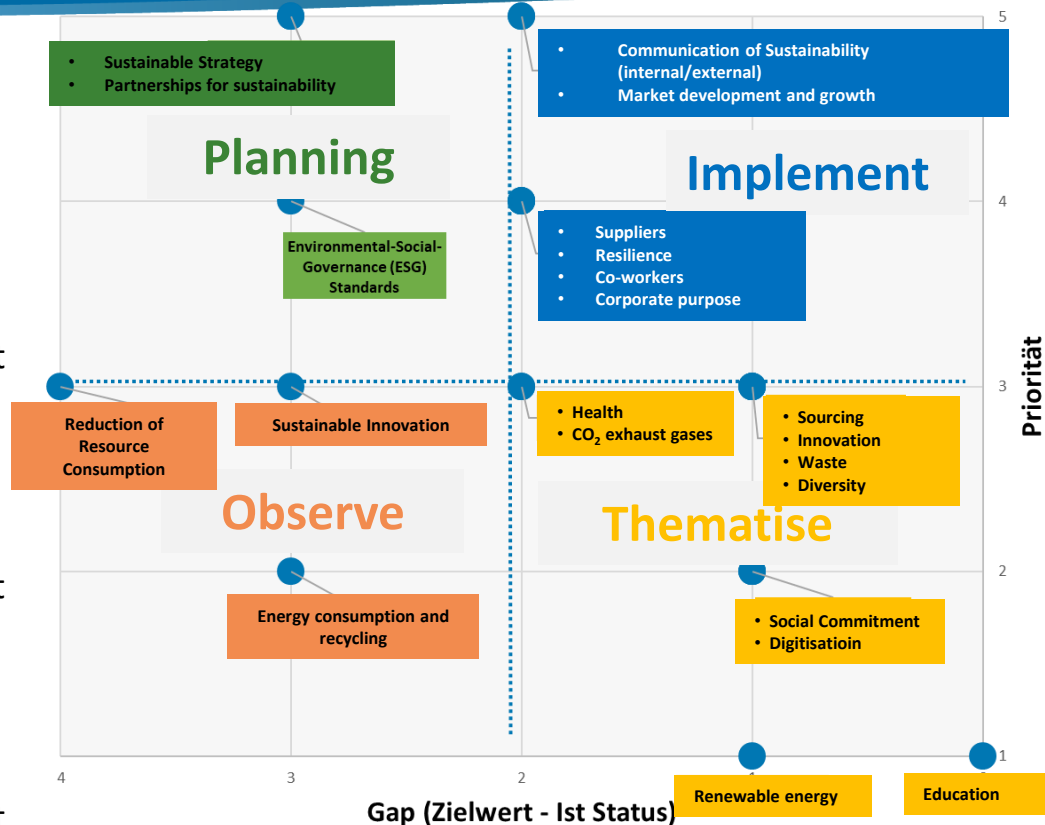
High/very high priority (3-5)  
Large gap between actual & target (2-4)

## Thematiser

Low priority (1-3)  
Small gap between actual & target (0-2)

## Observe

Low priority (1-3)  
Large gap between actual & target (2-4)



## “Business FutureProofing Tool”



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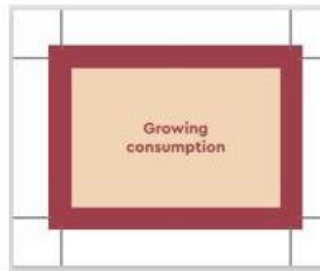
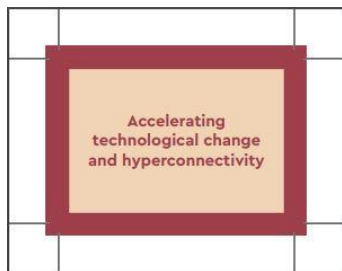
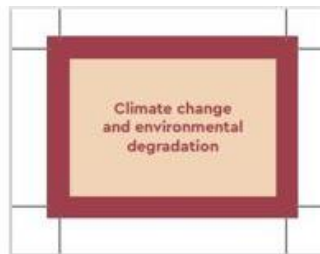


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Research and Technology - Hellas, Greece



- Developed by the UNESCO Chair of Future Research and PRAXI Network.
- Qualitative method, simple, effective and accessible tool for testing future readiness of an SME
- Focuses on current operational structure of an SME.
- Highlights areas that need to be redesigned and also opportunities that can be exploited.
- Provides guidance to SMEs on how megatrends and critical uncertainties could affect their operations directly or indirectly.
- Uses a pre-selected set of megatrends, drivers of change and critical uncertainties, derived from research carried out by the Joint Research Centre, the Millennium Project and SITRA.

# MEGATRENDS AND UNCERTAINTIES



**Megatrend:** a perceived long-term trajectory of a host of converging phenomena of global reach and broad scope, which is moving in a clearly identifiable general direction, although rarely linearly; a megatrend's local impact can vary.



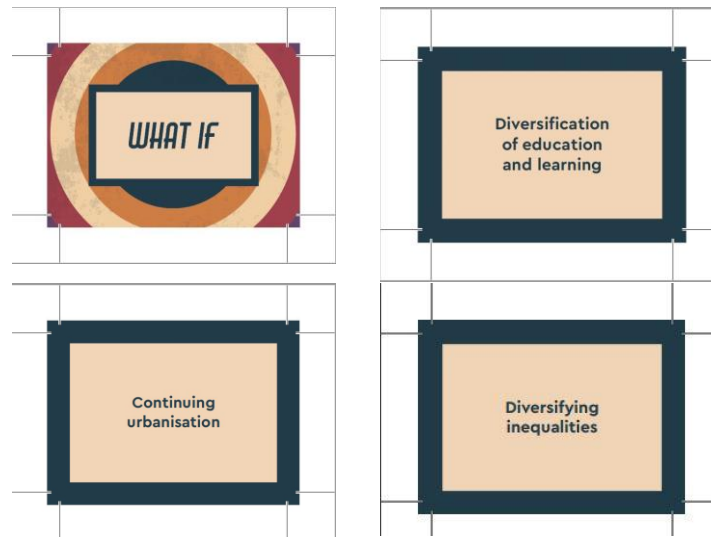
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**Trend:** a perceived trajectory of an important phenomenon moving in a clearly identifiable general direction, either stable or increasing/ decreasing in strength or frequency

**Uncertainty:** a perceived established force of change regarding an important phenomenon whose general direction, i.e. strength or frequency, is not clearly identifiable



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# STEP 0: THE BUSINESS MODEL CANVAS

|  |  |  |  |  |
|--|--|--|--|--|
| <p><b>KEY PARTNERS</b></p> <p>Who are our key partners?<br/>Who are our key suppliers?<br/>Which key resources are we acquiring from our partners?<br/>Which key activities do partners perform?</p> | <p><b>KEY ACTIVITIES</b></p> <p>What key activities do our value propositions require?<br/>Our distribution channels?<br/>Customer relationships?<br/>Revenue streams?</p> | <p><b>VALUE PROPOSITIONS</b></p> <p>What value do we deliver to the customer?<br/>Which one of our customers' problems are we helping to solve?<br/>What bundles of products and services are we offering to each segment?<br/>Which customer needs are we satisfying?<br/>What is the minimum viable product?</p> | <p><b>CUSTOMER RELATIONSHIPS</b></p> <p>How do we get, keep, and grow customers?<br/>Which customer relationships have we established?<br/>How are they integrated with the rest of our business model?<br/>How costly are they?</p>                                   | <p><b>CUSTOMER SEGMENTS</b></p> <p>For whom are we creating value?<br/>Who are our most important customers?<br/>What are the customer archetypes?</p> |
| <p><b>COST STRUCTURE</b></p> <p>What are the most important costs inherent to our business model?<br/>Which key resources are most expensive?<br/>Which key activities are most expensive?</p>       | <p><b>KEY RESOURCES</b></p> <p>What key resources do our value propositions require?<br/>Our distribution channels?<br/>Customer relationships?<br/>Revenue streams?</p>   |  | <p><b>CHANNELS</b></p> <p>Through which channels do our customer segments want to be reached?<br/>How do other companies reach them now?<br/>Which ones work best?<br/>Which ones are most cost-efficient?<br/>How are we integrating them with customer routines?</p> |  |

SOURCE [WWW.BUSINESSMODELGENERATION.COM/CANVAS](http://WWW.BUSINESSMODELGENERATION.COM/CANVAS). CANVAS CONCEPT DEVELOPED BY ALEXANDER OSTERWALDER AND YVES PIGNEUR.

- Business Model Canvas is a strategic and entrepreneurial tool
- It allows businesses to describe, design, challenge, invent and pivot the business strategy
- It requires participation of all important members of BoD
- Areas of disagreement or different understanding arise and are evaluated

# STEP 1: PREPARATION PHASE

## FUTURE PROOFING WINDTUNNEL

Evaluate the impact of each trend on the organization:

-2 (highly negative impact), -1 (negative impact), 0 (no or negligible impact), +1 (positive impact), +2 (highly positive impact)

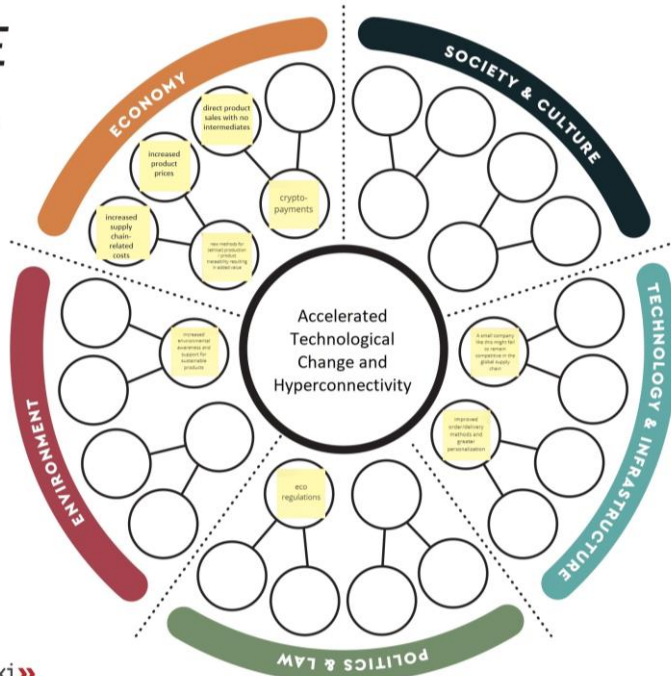
|   |  |  |  |  |  |  |  |  | WHAT IF 04 | WHAT IF 05 | WHAT IF 06 | SUM |
|---|--|--|--|--|--|--|--|--|------------|------------|------------|-----|
| <b>VALUE PROPOSITION</b><br><small>The unique service, product or service for a problem faced by a customer segment, or that creates value for the customer segment.</small>                    |  |  |  |  |  |  |  |  |            |            |            |     |
| <b>CUSTOMER SEGMENTS</b><br><small>The groups of people or companies that you are trying to target and sell your product or service to.</small>   |  |  |  |  |  |  |  |  |            |            |            |     |
| <b>CHANNELS</b><br><small>How your company communicates with and reaches out to your customers.</small>   |  |  |  |  |  |  |  |  |            |            |            |     |
| <b>CUSTOMER RELATIONSHIPS</b><br><small>The type of relationship you have with each of your customer segments or how you interact with them throughout their journey with your company.</small> |  |  |  |  |  |  |  |  |            |            |            |     |
| <b>REVENUE STREAMS</b><br><small>The sources from which a company generates money by selling their product or service to the customer.</small>  |  |  |  |  |  |  |  |  |            |            |            |     |
| <b>KEY ACTIVITIES</b><br><small>The activities/tasks that need to be completed to fulfil your business purpose.</small>   |  |  |  |  |  |  |  |  |            |            |            |     |
| <b>KEY RESOURCES</b><br><small>The key resources or main inputs you need to carry out your key activities in order to create your value proposition.</small>                                    |  |  |  |  |  |  |  |  |            |            |            |     |
| <b>KEY PARTNERS</b><br><small>The external companies or suppliers that will help you carry out your key activities.</small>   |  |  |  |  |  |  |  |  |            |            |            |     |
| <b>COST STRUCTURE</b><br><small>The costs associated with operating your business model.</small>  |  |  |  |  |  |  |  |  |            |            |            |     |
| <b>SUM</b>  |  |  |  |  |  |  |  |  |            |            |            |     |



- Company selects from a proposed set of cards, the five (5) key Megatrend cards and the five (5) key “What if” cards, which are critical to its operation, and places them in the columns
- The horizontal lines are the key characteristics of the company

## STEP 2: IMPACT ANALYSIS

### FUTURE WHEEL




- The Future Wheel method is used
- The Megatrends and drivers of change are placed in the center of the future wheel
- Primary and secondary impacts on the company are decided and noted in the following segments:-
  - ✓ **economy,**
  - ✓ **environment,**
  - ✓ **society & culture,**
  - ✓ **technology & infrastructure,**
  - ✓ **politics & legislation**
- Highlights significant and often less obvious impacts

# STEP 3: IMPACT EVALUATION

## FUTURE PROOFING WINDTUNNEL

Evaluate the impact of each trend on the organization:  
-2 (highly negative impact), -1 (negative impact), 0 (no or negligible impact), +1 (positive impact), +2 (highly positive impact)

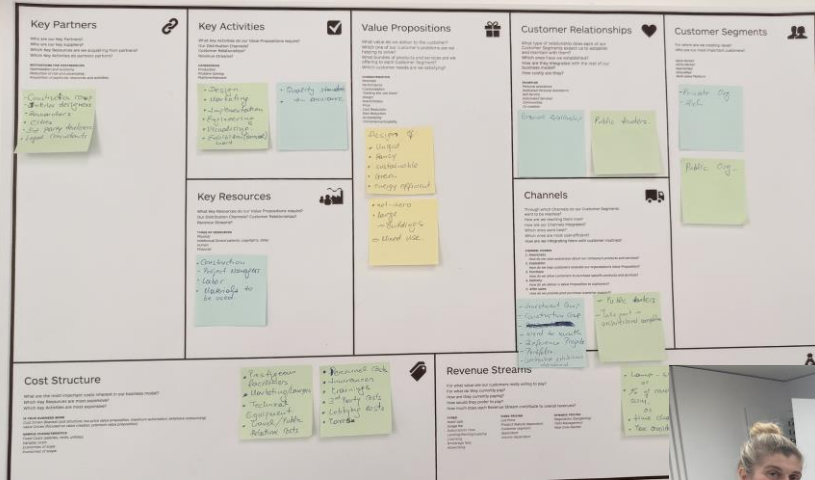


|   |    |    |    |  |  |  |  | WHAT IF 04 | WHAT IF 05 | WHAT IF 05 | SUM |
|---|----|----|----|--|--|--|--|------------|------------|------------|-----|
| <b>VALUE PROPOSITION</b><br><small>The unique value proposition or service for a problem faced by a customer segment, or that creates value for the customer segment.</small>                   | -2 | +2 | +1 |  |  |  |  |            |            |            |     |
| <b>CUSTOMER SEGMENTS</b><br><small>The groups of people or companies that you are trying to target and sell your product or service to.</small>   |    |    |    |  |  |  |  |            |            |            |     |
| <b>CHANNELS</b><br><small>How your company communicates with and reaches out to your customers.</small>   |    |    |    |  |  |  |  |            |            |            |     |
| <b>CUSTOMER RELATIONSHIPS</b><br><small>The type of relationship you have with each of your customer segments or how you interact with them throughout their journey with your company.</small> |    |    |    |  |  |  |  |            |            |            |     |
| <b>REVENUE STREAMS</b><br><small>The streams from which a company generates money by selling their product or service to the customer.</small>  |    |    |    |  |  |  |  |            |            |            |     |
| <b>KEY ACTIVITIES</b><br><small>The activities/tasks that need to be completed to fulfil your business purpose.</small>   |    |    |    |  |  |  |  |            |            |            |     |
| <b>KEY RESOURCES</b><br><small>The key resources or assets/inputs you need to carry out your key activities in order to create your value proposition.</small>                                  |    |    |    |  |  |  |  |            |            |            |     |
| <b>KEY PARTNERS</b><br><small>The external companies or suppliers that will help you carry out your key activities.</small>   |    |    |    |  |  |  |  |            |            |            |     |
| <b>COST STRUCTURE</b><br><small>The costs associated with operating your business model.</small>  |    |    |    |  |  |  |  |            |            |            |     |
| <b>SUM</b>  |    |    |    |  |  |  |  |            |            |            |     |



- Company selects from a proposed set of cards, the five (5) key Megatrend cards and the five (5) key “What if” cards, which are critical to its operation, and places them in the columns
- After discussion and brainstorming, the company evaluates each trend by placing a number from -2 (highly negative impact) to +2 (highly positive impact)
- By adding up the scores we can identify the drivers of change that require special attention
- We can also identify operations of the company at risk or existing opportunities for the company to explore

# THANK YOU FOR YOUR ATTENTION !!








**Dr. Katerina Tzitzinou**

**Director of International Affairs**

**FEDERATION OF INDUSTRIES OF GREECE**



 21, 26th Octovriou, 54627 Thessaloniki, Greece

 +30 2310 539817 ext. 400  +30 2310 541491

Email: [tzitzinou@sbe.org.gr](mailto:tzitzinou@sbe.org.gr)

Website: <http://sbe.org.gr>

Facebook: <https://www.facebook.com/sbeorggr/>

Twitter: <https://twitter.com/sbeorggr>

Linkedin: <https://www.linkedin.com/company/een-sbe/mycompany/>