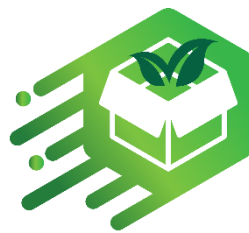


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COURIERS GO GREEN

Strategic Planning Green Framework

Project acronym: **Couriers Go Green**
Project full title: **Underpin Courier and Transportation Companies to Green their Operations**

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Table of Contents

1. Introduction.....	5
2. Green transition: Obstacles & Opportunities	5
2.1 Stakeholder map	5
2.2 Barriers and opportunities.....	7
3. Methodology workflow of the Framework.....	7
4. Methodology to set up a NEW Green Strategy	10
4.1 Phase 1: Assessment of green status of the company	10
4.1.1 Introduction to Phase 1	10
4.1.2 Steps in Phase 1.....	10
4.2 Phase 2: Design of a Green Strategy	11
4.2.1 Introduction to Phase 2.....	11
4.2.2 Steps in Phase 2.....	11
4.3 Phase 3: Development of the implementation plan	16
4.3.1 Introduction to Phase 3.....	16
4.3.2 Steps in Phase 3.....	16
5. Methodology to UPDATE a Green Strategy.....	20
5.1 Phase 1: Revision of the assessment of green status of the company.....	20
5.2 Phase 2: Revision of the Green Strategy.....	20
5.2.1 Introduction to Phase 2.....	20
5.2.2 Steps in Phase 2.....	20
5.3 Phase 3: Update of the Implementation plan.....	23
5.3.1 Introduction to Phase 3.....	23
5.3.2 Steps in Phase 3.....	23
5. Connection between the Framework and the TOOLBOX.....	25
6. Framework assessment.....	26
7. Conclusions.....	28
References.....	29
Annex A	30
Annex B	45

List of Figures

Figure 1: Stakeholder map of the green transition of courier, postal and delivery services (source: Own elaboration)	6
Figure 2: Main phases of the methodology	8
Figure 3: Methodology workflow for developing a Green Strategy	8
Figure 4: Methodology workflow for updating a Green Strategy	9

List of Tables

Table 1: Actions to define the strategy development working group, Phase 2, Step 1	12
Table 2: Actions to determine the priority areas and their corresponding main goals, Phase 2, Step 2	13
Table 3: Actions to identify available enabling mechanisms and resources for the green shift, Phase 2, Step 3.....	14
Table 4: Actions to draft the strategy document, Phase 2, Step 4.....	15
Table 5: Actions to derive specific goals within priority areas, and specific actions and be responsible for the implementation, Phase 3, Step 1.....	16

Table 6: Actions to assign specific resources to the defined specific actions, Phase 3, Step 2	17
Table 7: Actions to develop the final strategy and implementation plan, Phase 3, Step 3.....	18
Table 8: Actions to define how to execute and monitor the implementation plan, Phase 3, Step 4.....	18
Table 9: Actions to define the strategy and /or implementation update plan, Phase 2, Step 1	20
Table 10: Actions to analyse opportunities for improvement in the strategy and the implementation plan, Phase 2, Step 2.....	21
Table 11: Actions to update priority areas, corresponding main and specific goals, Phase 2, Step 3	22
Table 12: Actions to revise and update the implementation plan for the green strategy, Phase 3, Step 1.....	23
Table 13: Actions to assign new financial mechanisms and resources to the updated strategy & implementation plan, Phase 3, Step 2.....	24
Table 14: Actions to update the green strategy and implementation plan, Phase 3, Step 3.....	25
Table 15: List of resources to be made available in the TOOLBOX through steps and phases	45

1. Introduction

Strategic planning plays a crucial role for businesses and organizations aiming to align long-term sustainability objectives with the overall organizational strategy. In the transportation and logistics sector, strategic planning green frameworks offer valuable tools for companies seeking to make a green shift to their operations. These frameworks address key environmental challenges and emphasize the integration of eco-friendly practices into various aspects of the value chain. Sustainable transportation emphasizes adopting cleaner technologies and optimizing supply chains [1], while carbon footprint management involves measuring carbon emissions and focuses on reducing them through fuel-efficient vehicles and optimized route planning [2]. Green supply chain management integrates environmental considerations into the supply chain network, focusing on waste reduction, while circular economy concept encourages resource efficiency through remanufacturing and reverse logistics [3]. Such approaches provide a useful starting point for businesses and organizations in the transportation and logistics sector to develop strategic plans that prioritize sustainability and environmental responsibility. By measuring and reporting on their performance, business and organizations can identify opportunities for improvement and work towards a more sustainable future.

For this purpose, the “Couriers Go Green” project aims to develop a strategy as well as a training and a training-certification scheme that will offer competencies and motivation to target group organisations and their personnel to optimize their overall green environmental performance. In this project the main target groups are the Courier, Delivery, and Transportation companies personnel, while secondary target groups are Logistics, Transportation and Environmental consultants. The objective of this report, as the main deliverable of project Activity 2.2: “Development of Green Strategy Process Model Document”, is to develop a framework that serves as a roadmap to help a business or organisation to design activities required to implement a green shift into their operations. In addition, the framework is integrated into a digital TOOLBOX that provides the necessary guidance for the target groups to implement the green shift according to the planning process. To this end, the methodology is designed to help them follow a standardised and structured pathway, which has been tested by the project pilot companies in Activity 2.3.

The next section of the report outlines a mapping of the primary stakeholders or target groups that are directly involved in implementing the framework. It also includes important findings derived from the questionnaire survey and interviews included in Deliverable 2.1 in Chapter 4 (Activity 2.1). The third Chapter presents in detail the methodology established for creating or updating a green strategy in the target group sectors, while Chapters 4 and 5 provide a detailed description of all phases and steps of the methodology. In the final chapter, the main findings are presented and will serve as an essential input for future activities of the project.

2. Green transition: Obstacles & Opportunities

2.1 Stakeholder map

As described in the project’s ‘State Analysis Assessment Report,’ the green transition of courier, postal and delivery “last mile” operations is expected to contribute to the overall goal of European cities for sustainable development and climate resilience. In this context, the stakeholders that participate in the green transition of courier, postal and delivery services represent a wide range of actors, i.e., service providers, end-users of services, policymakers, consultants, and researchers. The above actors play a different role in the promotion of the green transition of courier, postal and delivery services (Figure 1).

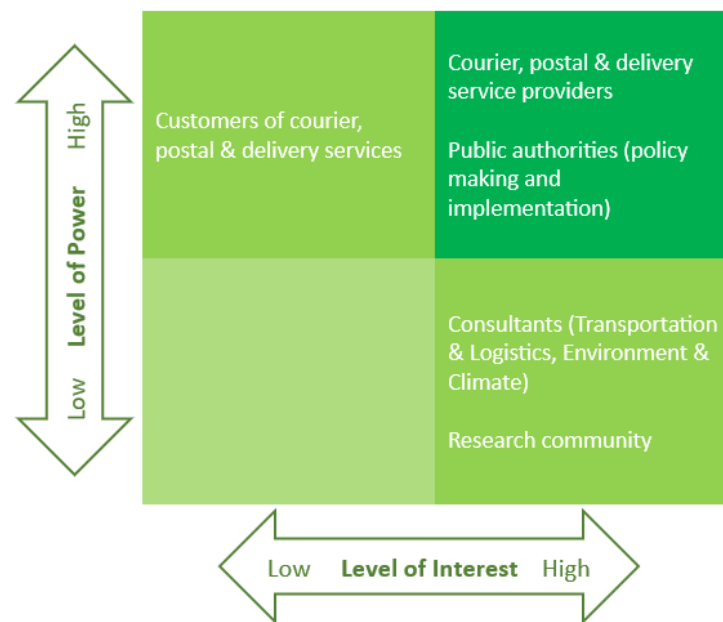


Figure 1: Stakeholder map of the green transition of courier, postal and delivery services (source: Own elaboration)

Some actors have a higher interest in developing and/or implementing green transition strategies, as this is a main goal of their mission, and are in the position to apply such strategies directly to their daily business or encourage/impose the application of such strategies through policy measures. These stakeholders are considered to have a high level of interest and power and comprise both the courier, postal and delivery service providers and the public authorities that design and implement the respective policies. The community of consultants and researchers contribute to the green transition by supporting companies and policymakers through evidence-based support to decision-makers (either authorities or companies), transfer of know-how and innovation and enhancement of knowledge and information for all stakeholders. However, they do not have the authority to directly realize changes in the courier, postal and delivery operations. Thus, it is considered that consultants and researchers, mainly in the fields of transportation & logistics and environment & climate, have a high level of interest but not a high level of power. On the other hand, the end-user, i.e., the customer (either citizen or company) of courier, postal and delivery service providers, can indirectly affect the green transition process by favoring “greener” services. If such consumer behavior was implemented at a large scale, it could play a definitive role in the implementation of green transition strategies. There are various aspects that do not facilitate such a behavioral shift at a large scale, which refer to the awareness and engagement of the public, incentivization and affordability of “green” products and services etc. These aspects have not yet been successfully addressed by policymakers, ranking the green transition of courier, postal and delivery services lower in the priorities of customers. In this sense, end-users have a high cumulative power for green transition, but, under the current circumstances, have low interest or ability to exploit this power.

Based on the above approach, the project identifies two groups of stakeholders, i.e., the main target group which combines “high power” and “high interest” towards the green transition and the secondary target group, which is as strategically important for the green transition as the main target group but exhibits either lower “power” or lower “interest”.

More specifically, these target groups comprise:

- Main target group: Courier, postal and delivery services and public authorities responsible for policy-making and management.
- Secondary target group: Transport & logistics and climate and environment strategy consultants, researchers, companies and other users of the aforementioned services.

Through appropriate action, the project will appropriately empower all stakeholders to become agents of the green transition.

2.2 Barriers and opportunities

Drawing conclusions from the ‘State Analysis Assessment Report’ and namely the relevant stakeholder questionnaire survey and interviews, the main barriers towards the green transition of courier, postal and delivery services were identified. A major barrier is the lack of detailed and updated knowledge of the relevant EU and national policy framework by many stakeholders, a fact that refers also to some service providers, infrastructure management authorities, consultants, and researchers. The renewal of vehicle fleets for operators to replace older and more polluting vehicles with zero-carbon ones is relatively limited. In addition, energy consumption related to non-transport-related activities, i.e., by buildings and equipment, is high. On the other hand, the adoption of new technologies, such as the use of renewable energy and automation, is still low. According to many of the survey respondents, the measures and policies implemented at the national level are insufficient or ineffective. From the side of the operators, there is a lack of effective strategic planning and know-how in monitoring and managing the green transition.

Despite the average to low level of updated knowledge of the EU and national policy framework, stakeholders consider that the implementation of such policies is important to achieve sustainability in the operations of courier, postal and delivery service companies. Towards this direction, the companies may gain useful insight and understanding by adopting a strategic framework that will help them assess their strengths and priorities, mainly those that address the energy efficiency of vehicles, buildings and equipment, the employee awareness, training and engagement, training certification and the monitoring of emissions and reporting. Moreover, some cases were identified that the companies have developed and implemented green transition strategies or initiatives, which however comprise isolated efforts. For example, less than half of the surveyed companies have designed or implemented training (e.g. eco-driving) and skill certification schemes for their employees. On the basis of a holistic framework, such as the one developed by the current project, a unique opportunity is also presented to share knowledge and exchange good practices.

3. Methodology workflow of the Framework

Depending on the company’s maturity level, the methodology follows two different approaches. Thus, the first step is to identify whether the companies have an existing Green Strategy and wish to update it, or if there is a non-existent Green Strategy and they wish to set it up.

Figure 2 depicts the workflow related to the CGG methodology to be applied for companies aiming to develop or update their green strategy. The logical streams go through three main Phases, representing the most important actions of the development or revision of a green strategy.

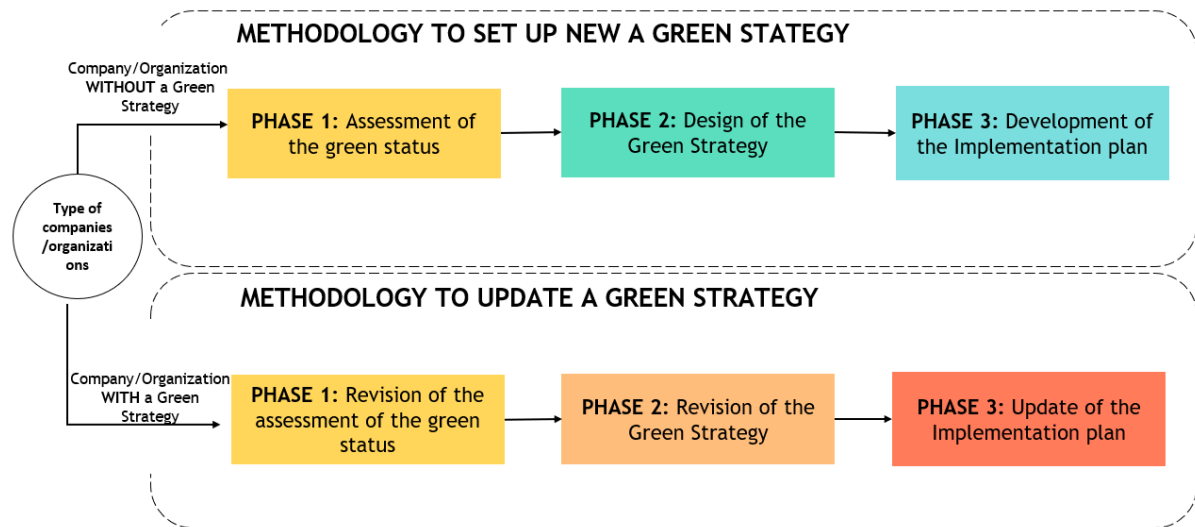


Figure 2: Main phases of the methodology

Companies are invited to start with Phase 1 to assess their green status related to the status quo, the challenges, and the opportunities they face. Based on the preliminary assessment, companies are ready to start developing or updating the Green Strategy (Phase 2) and then its implementation plan assigning the necessary human and financial resources (Phase 3).

The methodology consists of a consecutive sequence of Steps within each Phase, as shown in the figures below. However, each phase and step are self-contained and not dependent on the others. The suggested order is only a recommendation to ensure that no relevant information is overlooked during the process, but users can skip steps that they have already completed before using this methodology. The decision to follow all the steps or navigate randomly through the available information is up to the users.

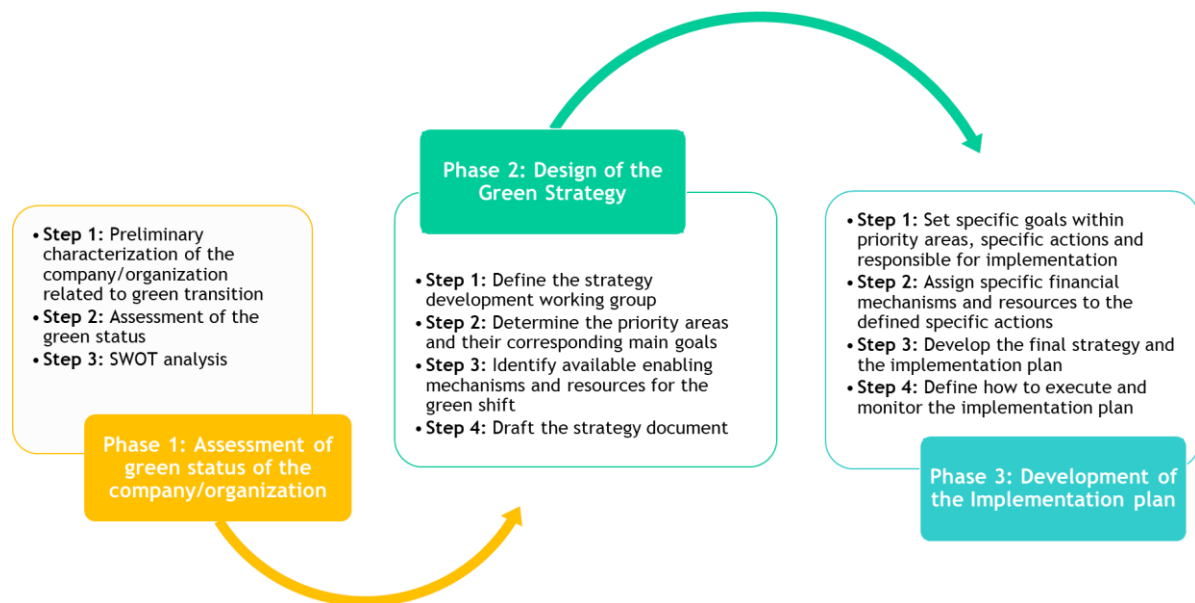


Figure 3: Methodology workflow for developing a Green Strategy



Figure 4: Methodology workflow for updating a Green Strategy

The following chapters describe the phases and steps in detail for each approach (New and Updated Strategy), including the necessary resources to implement them. To this end, there are some clarifications to facilitate the understanding of the Framework and how the final users can have access to the resources available in the digital TOOLBOX and how to use them.

In particular, for each Phase an **introduction** as well as a **steps' description** is included. In detail:

- **Introduction of the Phase:**

Each phase includes a short introduction that describes the aim of the phase and what the user can expect. It also includes a reference on who should be involved to provide complementary information on the target groups needed to engage in each phase.

- **Steps overview:**

Each phase describes the sequence of steps to be followed. Each step includes all or some of the following information:

- **Objective:** The objective of the step, clarifying what the user will gain at the end of each step.
- **Action:** An indication of how to use the resources available in that step.
- **Available Material:** It clarifies which are the available resources (type of resource). In the TOOLBOX, at this point, the user will be able to download or access the resources indicated.

4. Methodology to set up a NEW Green Strategy

4.1 Phase 1: Assessment of green status of the company

4.1.1 Introduction to Phase 1

The primary objective of Phase 1 is to evaluate the Couriers and Logistics companies' potential for a green shift by characterising their current green status. This process involves analysing different factors related to that, such as green operations, green competence and skills, certification of skills etc. Once completed, an outcome that outlines the potential of improved sustainability of the company, along with a Strengths, Weaknesses, Opportunities, Threats (SWOT) analysis will be produced. This information will serve as a foundation for the subsequent phases.

Who to involve in this phase?

The methodology suggests the involvement of various members of the company to analyse, use, and integrate the documents and material provided. This involvement should begin early in the Phase 1, and executives or managers should be involved. However, it is essential to engage the relevant departments of the company to gather the information needed to build or update the strategy in the upcoming steps.

4.1.2 Steps in Phase 1

Step 1: Preliminary characterization of the company related to green transition

- **Objective:** a preliminary analysis of the company to understand its green shift potential considering various aspects related to green transition. For this purpose, a form can be used to gather information about the current practices of the company towards sustainability. This information will provide a comprehensive overview of the company and serves as a baseline for subsequent steps to identify areas where improvements can be made to reduce the environmental impact of operations.
- **Actions:** During this step the company should complete the 'Green status characterization form' to get information and enable specificity in the answers.
- **Material available:** Green status characterization form: Template to collect general information about the company (Annex A).

Step 2: Assessment of the green status

- **Objective:** The second step evaluates the current situation of the company and its potential for establishing a new strategy (or updating an existing one) towards a green shift. This analysis is based on several criteria. The use of a checklist is suggested as a tool to assess the status of the company in transitioning to a greener strategy.
- **Actions:** The user can check if green initiatives have been considered, through the use of the assessment form. Additionally, the user can choose to assess the company's carbon footprint by using the "Measure my Green Readiness" Self-Assessment Tool.
- **Material available:**
 - Assessment form: Template to assess the green status (Annex A).
 - "Measure my Green Readiness" Self-Assessment Tool and Tool Manual (CGG PR3.1).

Step 3: SWOT analysis

- **Objective:** SWOT stands for strengths, weaknesses, opportunities, and threats. A SWOT analysis is a strategic planning tool used to assess those four aspects. This is how a company can capture its current performance and build a strategy to achieve its future goals. It involves identifying the internal and external factors that can impact the success of the business. The strengths and weaknesses refer to internal factors, such as the organization's resources, capabilities, and limitations. The opportunities and threats refer to external factors, such as market trends, competition, funding programmes and opportunities, current national policy targets and priorities and regulatory changes. By analysing these factors, the organization can develop strategies to capitalize on its strengths, address its weaknesses, seize opportunities, and mitigate threats. This provides a wide picture of how a company can carve a route to reach its objectives.
- **Action:** The user can review the provided template in order to familiarise in how to complete the SWOT matrix.
- **Material:** Template document for a SWOT analysis of the company (Annex A, An Example for a Transportation Service Company)

4.2 Phase 2: Design of a Green Strategy

4.2.1 Introduction to Phase 2

A green strategy combines a set of actions designed to mitigate the environmental impact of companies' operations and products while creating value for customers and other stakeholders involved in the value chain. By implementing a green strategy, companies can facilitate a transition towards sustainability, aiming to reshape their business models to operate in a more green and circular way. The design of an effective green strategy requires a sustainable approach that considers potential synergies between ecological responsibility and economic growth.

Who to involve in this phase?

To ensure the success of the goals and initiatives of the green strategy, a dedicated working group is recommended to be established for the development and execution of the strategy. This group should involve company executives belonging to different departments, such as management, marketing, finance, operations, logistics, and procurement, as well as external stakeholders, such as suppliers, external environmental consultants, etc. This cross-functional and cross-departmental team aims to ensure an integrated and collaborative approach to achieve the goals of the green strategy.

4.2.2 Steps in Phase 2

Step 1: Define the strategy development working group

- **Objective:** In this step, the strategy development group should be established. The role of the working group is to clarify the scope and objectives of the strategy, identify the key focus areas, prioritize initiatives, and develop the implementation plan. For the smooth operation of the working group, it is particularly important to clearly define the roles, responsibilities, and accountability of the members. Given the multidimensions of a green strategy, ensure the involvement of key members and their cross-functional cooperation within the working group. An indicative structure of the strategy development working group could involve the following sub-groups:

- **Company Leadership team:** Top-level executives and decision makers within the company. Their support and commitment to sustainable practices are crucial for implementing a green strategy. It is advisable to consider a strategy leader.
- **Environmental and Sustainability experts:** Collaborate with environmental consultants or experts who specialize in renewable energy, emissions reduction, and environmental impact assessment. If the company has a dedicated sustainability manager or department, involve them to help align the strategy with the overall environmental challenges and sustainability goals.
- **Operational and logistics team:** representatives from operations and logistics departments. They possess valuable knowledge about current processes, fleet management and operational challenges.
- **Technology experts:** engage professionals with expertise in sustainable transportation technologies and smart logistic solutions. Their knowledge can assist in identifying and implementing sustainable technological solutions.

- **Actions:**

Table 1 can serve as a guideline of actions to define the strategy development working group, including, tasks that should be implemented, as well as the responsible people/teams and possible methods to complete those tasks.

Table 1: Actions to define the strategy development working group, Phase 2, Step 1

Task	Responsible	Possible methods
Establishment of the working group	Leadership team Sustainability expert Strategy leader	<ul style="list-style-type: none"> • Including representatives from the executive leadership team, environmental/sustainability/technology experts, operations, and logistics team. • Identification of a project lead or coordinator who will facilitate meetings, track progress, and ensure the timely execution of the group’s tasks.
Clear definition of the purpose and goals of the working group	Leadership team Strategy leader	<ul style="list-style-type: none"> • Determination of the scope of the green strategy, including specific areas of focus such as carbon footprint reduction, smart logistics, waste management, or sustainable packaging.
Conduction of a kick-off meeting to communicate all the above	Strategy leader	<ul style="list-style-type: none"> • Bring together the working group members to introduce the project, discuss the objective, and establish a common understanding. • The share of relevant information on the company's current environmental performance, industry trends, and regulatory considerations.

Task	Responsible	Possible methods
Assign roles and responsibilities	Leadership team Strategy leader	<ul style="list-style-type: none"> Assign specific responsibilities to each working group member based on their expertise. Encourage collaboration and teamwork to leverage the diverse skill sets within the group.
Recommended resources		
<ul style="list-style-type: none"> It will be helpful for the responsible to consult: Assessment of the green status (Phase 1, Step 2) 		

Step 2: Determine the priority areas and their corresponding main goals

- **Objective:** To design an environmentally sustainable strategy, it is essential to identify and prioritize key focus areas and establish the main goals within the courier and transport sectors. The goal is to create a strategic plan that promotes green practices, reduces environmental impact, and enhances sustainability throughout the sector. The green status and SWOT analysis outcomes from Phase 1, as well as the company’s mission and vision, are the base for setting the priority areas of the strategy. This process should involve all relevant actors from the strategy development working groups, but also members from the advisory groups if needed. When defining the priority areas, their main goals should be clear and reveal how it relates to the achievement of the strategy vision.

- **Actions:**

Table 2 can serve as a guideline of actions to determine the priority areas and their corresponding main goals, including, tasks that should be implemented, as well as the responsible people/teams and possible methods to complete those tasks.

Table 2: Actions to determine the priority areas and their corresponding main goals, Phase 2, Step 2

Task	Responsible	Possible methods
Preliminary assessment	Strategy development working group	<ul style="list-style-type: none"> Based on the company’s green status and SWOT analysis (Phase 1), a comprehensive assessment of the status of the courier and transport sector should be conducted, including regulations, industry trends and best practices related to sustainability in these sectors.
Stakeholder engagement	Strategy development working group	<ul style="list-style-type: none"> Engagement of stakeholders such as environmental and sustainability experts, technical experts, and operational and logistics teams. Engage the advisory group, if necessary to capture their views.
Identification of priority areas	Strategy development working group	<ul style="list-style-type: none"> Based on the preliminary assessment and stakeholders’ insights and recommendations, identify priority areas that have the most significant environmental impact and potential for improvement. These may include fleet efficiency,

Task	Responsible	Possible methods
		logistics optimization, sustainable packaging, and employee engagement.
Set main goals	Strategy development working group	<ul style="list-style-type: none"> Clear and measurable main goals for each area should be established. The goals should align with the broader sustainability objectives, such as GHG emissions reduction, waste minimization, and renewable energy promotion usage.
Recommended resources It will be helpful for the responsible to consult: <ul style="list-style-type: none"> - Assessment of the green status (Phase 1, Step 2) - SWOT analysis (Phase 2, Step 3) - Catalogue of green solutions (Annex A) - Best practice examples (Annex A) - Policies to support green business models (Annex A) - Related projects (Annex A) - Training (Annex A) 		

Step 3: Identity available enabling mechanisms and resources for the green shift

- **Objective:** To implement the strategy effectively, it is important to define the required resources and mechanisms that will support the green transition. This process begins by identifying the supporting mechanisms and financial resources available at the national and European levels. This mapping will emerge various opportunities, for example the policy programs and plans, and the suitable financial instruments in different areas of the courier and transport sector, such as green transportation, smart logistics, energy efficiency, and waste management.

- **Actions:**

Table 3 can serve as a guideline of actions to identity available enabling mechanisms and resources for the green shift including, tasks that should be implemented, as well as the responsible people/teams and possible methods to complete those tasks.

Table 3: Actions to identity available enabling mechanisms and resources for the green shift, Phase 2, Step 3

Task	Responsible	Possible methods
Identification of available supportive resources and enabling mechanisms to achieve the objectives of the priority areas.	Strategy development working group Advisory Group	<ul style="list-style-type: none"> List of current operational programs at the national and European level. List of existing environmental policies and regulations in the country that promote green initiatives. List of sources of financial support and funding opportunities for green initiatives.
Recommended resources It will be helpful for the responsible to consult:		

Task	Responsible	Possible methods
<ul style="list-style-type: none"> - Determined priority areas for guidance (Phase 2, Step 2) - Financial instruments and tools (Annex A) - Policies to support green business models (Annex A) - Related projects (Annex A) - Training (Annex A) 		

Step 4: Draft the strategy document

- **Objective:** Based on the input from the previous steps, the strategy development working group will draft the green strategy document. During this step several aspects are recommended to be included, such as the motivation for the strategy development based on the company’s vision, the main goals to succeed, as well as the identification of priority areas and the financial mechanisms to support the transition. The outcomes of the green assessment status and the SWOT analysis should also be included, setting the background towards the transition. Finally, the consultation process within the strategy development working group, and the main conclusions should be presented to better capture the diverse perspectives of the strategy development.

Depending on the scope of green strategy development, in this step, companies can finalize the strategy draft, deliver the final document, and use it for their long-term mission. In case they need to produce an operational document for short to medium-term use, they are encouraged to move on to the next phase and develop an implementation plan that serves as a roadmap for strategy execution.

- **Actions:**

Table 4 can serve as a guideline of actions to draft the strategy document, including, tasks that should be implemented, as well as the responsible people/teams and possible methods to complete those tasks.

Table 4: Actions to draft the strategy document, Phase 2, Step 4

Task	Responsible	Possible methods
Draft the green strategy document	<p>Strategy development working group</p> <p>Advisory Group</p>	<ul style="list-style-type: none"> • Green strategy document draft finalization from the strategy development working group, considering several aspects such as the motivation for the strategy development based on the company’s vision, the main goals to succeed, the identification of priority areas and the financial mechanisms to support the transition as well as the outcomes of the green assessment status and the SWOT analysis.
Recommended resources – Material Available		

- It will be helpful for the responsible to consult:
- Results of Phases 1 and 2
 - Template of the strategy document (Template C-Annex A)

4.3 Phase 3: Development of the implementation plan

4.3.1 Introduction to Phase 3

For the finalisation of the strategy, an implementation plan is needed to achieve the main goals set within each priority area in Phase 2. The implementation plan acts as a detailed roadmap describing how these goals will be reached, which human and financial resources are needed, how they will be allocated and the performance measures while monitoring the strategy. This, in the end, increases the company's efficiency and effectiveness towards the execution of the strategy.

Who to involve in this phase?

It is recommended to involve the same actors as in Phase 2.

4.3.2 Steps in Phase 3

Step 1: Derive specific goals within priority areas, and specific actions and be responsible for the implementation

- **Objective:** According to the priority areas and the main goals defined in Step 2 of Phase 2, it is essential to provide more detailed objectives that are both specific and measurable. The initial formulation of the specific goals can be undertaken by the strategy development working group. For each goal relating to the corresponding area, it is important to draft feasible and actionable steps, while assigning the responsibility of implementation to a body of the company or organization. It is also crucial to clarify evaluation and monitoring methods for the successful execution of these measures.

- **Actions:**

Table 5 can serve as a guideline of actions to derive specific goals within priority areas, and specific actions and be responsible for the implementation including, tasks that should be implemented, as well as the responsible people/teams and possible methods to complete those tasks.

Table 5: Actions to derive specific goals within priority areas, and specific actions and be responsible for the implementation, Phase 3, Step 1

Task	Responsible	Possible methods
Derive specific goals, specific actions, and the responsible body for the implementation	Strategy development working group Advisory group	Working groups and feedback rounds within working group members.
Recommended resources It will be helpful for the responsible to consult: <ul style="list-style-type: none"> - Catalogue of green solutions (Annex A) - Best practice examples (Annex A) - Related projects (Annex A) - Training (Annex A) - Tools (Annex A) 		

Step 2: Assign specific resources to the defined specific actions

- **Objective:** Based on Step 4 of Phase 2, each planned action should be assigned to specific resources. Proper resource allocation is crucial to support the implementation of all actions during the implementation plan period, which in turn will ensure that the individual priorities of the strategy are effectively developed and achieved.

- **Actions:**

Table 6 can serve as a guideline of actions to assign specific resources to the defined specific actions, tasks that should be implemented, as well as the responsible people/teams and possible methods to complete those tasks.

Table 6: Actions to assign specific resources to the defined specific actions, Phase 3, Step 2

Task	Responsible	Possible methods
Assign specific mechanisms to the specific planned actions.	<p>Strategy development working group</p> <p>Financial expert</p> <p>Business development expert</p>	<ul style="list-style-type: none"> • Search for external funding opportunities. • Contact local utilities and energy programs • Budget and people allocation. • Feedback rounds with the Leadership team, the Operation team and the advisory group.
<p>Recommended resources</p> <p>It will be helpful for the responsible to consult:</p> <ul style="list-style-type: none"> - Determined priority areas and their main goals (Phase 2, Step 2) - Financial instruments and tools (Annex A) - Policies to support green business models (Annex A) - Training (Annex A) 		

Step 3: Develop the final strategy and implementation plan

- **Objective:** The final strategy and implementation plan documents should incorporate the results of the previous steps, taking into account available resources and dependencies, and setting realistic timelines. Monitoring and evaluation of key performance indicators (KPIs) help to track progress and identify areas for improvement, while risk assessment and mitigation strategies facilitate the address of potential obstacles. Finally, considering scalability and sustainability aspects throughout the strategy and implementation plan development will ensure the long-term impact of the green initiatives and the growth of the company. The strategy development working group will run this process, conducting a final consultation round with relevant stakeholders within group members for approving the strategy document and implementation plan.

- **Actions:**

Table 7 can serve as a guideline of actions to develop the final strategy and implementation plan, tasks that should be implemented, as well as the responsible people/teams and possible methods to complete those tasks.

Table 7: Actions to develop the final strategy and implementation plan, Phase 3, Step 3

Task	Responsible	Possible methods
Finalizing the green strategy and the implementation plan.	Strategy development working group	<ul style="list-style-type: none"> Final consultation with working group members and relevant stakeholders. Analysis of consultation feedback with the decision-level team and advisory group. Include approved changes to the final documents.
Recommended resources – Material Available It will be helpful for the responsible to consult: <ul style="list-style-type: none"> - Determined priority areas and their main goals (Phase 2, Step 2) - Derived specific goals, specific actions and responsible for implementation (Phase 3, Step 1) - Assign specific financial mechanisms and resources to the defined specific actions (Phase 3, Step 3) - Template D (Annex A) 		

Step 4: Define how to execute and monitor the implementation plan

- **Objective:** When implementing a plan, it is critical to regularly monitor and evaluate your progress toward meeting your sustainability goals. This involves tracking your KPIs and reporting progress back to the strategy development working group and the relevant stakeholders. Regular monitoring and reporting can help your business stay accountable to its sustainability commitments and identify new opportunities for improvement. Additionally, establish timelines with milestones, roles, and responsibilities to track the progress and address any delays or bottlenecks. This process also contributes to better monitoring of risks and taking proactive measures to mitigate them. Another important point is to maintain an open channel of communication with team members and stakeholders, asking for their feedback and continuously improving the plan based on their insights. Finally, keep detailed documentation and generate regular reports to update stakeholders and evaluate progress.

- **Actions:**

Table 8 can serve as a guideline of actions to define how to execute and monitor the implementation plan, tasks that should be implemented, as well as the responsible people/teams and possible methods to complete those tasks.

Table 8: Actions to define how to execute and monitor the implementation plan, Phase 3, Step 4

Task	Responsible	Possible methods
Identify roles, responsibilities and establish timelines	Operations managers	Break down the project into smaller tasks and assign time estimates, roles and responsibilities of execution team members to each task.
Maintain Communication	Strategy leader	Establish regular team meetings to discuss progress, challenges, and updates.
Monitor Risks	Operations team Strategy leader	Implement a risk monitoring and reporting system to track the status of risks and take timely actions.

Evaluate Effectiveness	Environmental, Technical & Sustainability experts	Use qualitative and quantitative data, such as surveys, performance reports, or stakeholder feedback, to evaluate effectiveness.
Implementation Process Documentation	Operations team Strategy leader	Maintain a centralized repository for documentation, such as an electronic document management system or a shared drive.
Evaluate Progress	Operations team Strategy leader	Compare actual progress against planned milestones and Objectives to evaluate the overall progress of the implementation.
<p>Recommended resources</p> <p>It will be helpful for the responsible to consult:</p> <ul style="list-style-type: none"> - Catalogue of green solutions (Annex A) - Best practices examples (Annex A) - Related projects (Annex A) - Training (Annex A) - Tools (Annex A) 		

5. Methodology to UPDATE a Green Strategy

5.1 Phase 1: Revision of the assessment of green status of the company

The revision of the assessment of the green status of a company is an important process to ensure that the company meets its goals and makes progress toward a more sustainable future. The upcoming phase will follow the same approach as Phase 1 of the methodology to develop new green strategies, as outlined in section 4.1 of this document. The structure and resources that were used in Phase 1 will also be available for this phase. To prevent repetition, this chapter will not include the same information as before.

5.2 Phase 2: Revision of the Green Strategy

5.2.1 Introduction to Phase 2

This phase should involve a wide range of actors participating in the strategy development working group, to ensure a comprehensive analysis of the existing green strategy and implementation plan. This diverse participation will bring different perspectives and expertise, enriching the review process and allowing for the effective identification of opportunities for improvement.

5.2.2 Steps in Phase 2

Step 1: Define the strategy and /or implementation update plan

- **Objective:** For the successful revision of the green strategy, it is recommended to engage the individuals who contributed during its development to define the plan to update the strategy. Thus, the strategy update working group should be set to provide their expertise. The plan for updating the strategy involves practical considerations such as assigning a group responsible for drafting the strategy document. Typically, this group comprises sustainability and technical experts from the relevant sectors. Finally, it is also crucial to establish monitoring mechanisms to track the implementation of the strategy.

- **Actions:**

Table 9 can serve as a guideline of actions to define the strategy and /or implementation update plan, tasks that should be implemented, as well as the responsible people/teams and possible methods to complete those tasks.

Table 9: Actions to define the strategy and /or implementation update plan, Phase 2, Step 1

Task	Responsible	Possible methods
Define the strategy and/or implementation update plan	Strategy update working group Advisory group	<ul style="list-style-type: none"> • At the company level set a group of technical experts to draft the document. • Invite the advisory group and ask for new members, based on the lessons learnt from the former process.
Recommended resources It will be helpful for the responsible to consult: <ul style="list-style-type: none"> - Results of the implementation of the previous green strategy (Monitoring phase, Methodology to set up a NEW Green Strategy, Phase 3, step 1) - Assessment of green status (Methodology to set up a NEW Green Strategy, Phase 1, Step 2) - Catalogue of green solutions (Annex A) - Best practices examples (Annex A) - Training (Annex A) 		

Step 2: Analyse opportunities for improvement in the strategy and the implementation plan

- **Objective:** Using the assessment of the company’s green status, the responsible can initiate an analysis of the current green challenges in the courier and transport priority areas. These challenges may have already been identified during the implementation of the green strategy, so it is advisable to conduct interviews with selected experts and representatives to help identify the main issues to be considered when updating the strategy. In addition, the responsible will identify areas where the existing strategy and implementation plan can be strengthened and optimized, enhance the accountability and monitoring mechanisms to track the progress and ensure continuous improvement. It is crucial to align with the evolving sustainability objectives and the latest industry best practices and improve the effectiveness, efficiency and impact of the initiatives being implemented.

- **Actions:**

Table 10 can serve as a guideline of actions to analyse opportunities for improvement in the strategy and the implementation plan, tasks that should be implemented, as well as the responsible people/teams and possible methods to complete those tasks.

Table 10: Actions to analyse opportunities for improvement in the strategy and the implementation plan, Phase 2, Step 2

Task	Responsible	Possible methods
Evaluate the current green strategy and implementation plan	Strategy update working group	<ul style="list-style-type: none"> • Review the existing green strategy and implementation plan in detail, considering its objective, initiatives, targets, and timelines. • Assess the clarity, coherence, and relevance of the defined goals and actions considering current environmental challenges and trends.
Gather feedback and insights	Strategy update working group	<ul style="list-style-type: none"> • Engage with relevant stakeholders, including employees, customers, suppliers, and industry experts, to gather feedback on the existing green strategy. • Conduct surveys, interviews, or focus groups to understand their perspectives, suggestions, and concerns regarding the implemented initiatives. • Get help from external sustainability consultants or experts who specialize in strategy review and optimization. • Benefit from their experience and best practices for evaluating and improving the existing strategy. • Incorporate the feedback received to identify areas for improvement and align the strategy with stakeholder expectations.

Task	Responsible	Possible methods
Collaborate with operational teams	Strategy update working group	<ul style="list-style-type: none"> Get their views on challenges, successes, and potential improvements in terms of strategy implementation. Draw on their operational knowledge and experience to identify practical opportunities for improvement.
Benchmark Against Best Practices	Strategy update working group	Benchmark your existing green strategy against industry best practices, guidelines, and standards.
<p>Recommended resources</p> <p>It will be helpful for the responsible to consult:</p> <ul style="list-style-type: none"> - Current green strategy vision - Assessment of green status (Methodology to set up NEW Green Strategy, Phase 1, Step 2) - Identified challenges and opportunities, SWOT analysis (Methodology to set up a NEW Green Strategy, Phase 1, Step 3) - Results of the implementation of the previous green strategy (Monitoring phase, Methodology to set up a NEW Green Strategy, Phase 3, step 1) - Catalogue of green solutions Annex A) - Best practices examples (Annex A) - Related projects (Annex A) - Training (Annex A) 		

Step 3: Update priority areas, corresponding main and specific goals

- **Objective:** During this step, the responsible will ensure that all necessary updates, modifications, or additions to the strategy's priority areas are considered. Whenever a new priority area is considered necessary the responsible should verify that it aligns with the company's vision and does not overlap with any other priority area.

The involvement of relevant experts and stakeholders and the feedback they provide will play a crucial role in determining whether new priority areas are needed or if changes should be made to the original strategic framework. Just like in the strategy development phase, any new or updated priority areas must have a clear main goal and specific goals, which will be reflected in the updated implementation plan.

- **Actions:**

Table 11 can serve as a guideline of actions to update priority areas, corresponding main and specific goals, tasks that should be implemented, as well as the responsible people/teams and possible methods to complete those tasks.

Table 11: Actions to update priority areas, corresponding main and specific goals, Phase 2, Step 3

Task	Responsible	Possible methods
Update, if necessary, the priority areas, main and specific goals	Strategy update working group	The consultation process with engaged experts and teams, as well as the advisory group.
Recommended resources		

It will be helpful for the user to consult:

- Current green strategy vision
- Results from the revision of the green status assessment analysis (Methodology to UPDATE a Green Strategy, Phase 1)
- Analysis of sustainability challenges from interviews with experts (Methodology to UPDATE a Green Strategy, Phase 1, Step 2)
- Results of green strategy implementation (Methodology to set up a NEW Green Strategy, monitoring of KPIs)
- Catalogue of green solutions (Annex A)
- Best practices examples (Annex A)
- Policies to support green business models (Annex A)
- Related projects (Annex A)
- Training (Annex A)

5.3 Phase 3: Update of the Implementation plan

5.3.1 Introduction to Phase 3

In this phase, the implementation plan is suggested to be designed to set the action map to achieve the updated goals set in Phase 2. The plan should present in detail how all goals will be reached, the human and financial resources that will be allocated, as well as the monitoring mechanism of the updated strategy.

Who to involve in this phase?

It is recommended to involve the same actors as in Phase 2.

5.3.2 Steps in Phase 3

Step 1: Revision and update of the implementation plan for the green strategy

- **Objective:** During this step, new actions can be incorporated into the implementation plan within both current and newly identified priority areas. This process aligns with the feasibility of the updated strategy, drawing upon the analysis of the strategy implementation, the underlying challenges within the transportation and logistics sectors, as well as the final decisions made by the strategy update working group.

- **Action:**

Table 12 can serve as a guideline of actions to revise and update the implementation plan for the green strategy, tasks that should be implemented, as well as the responsible people/teams and possible methods to complete those tasks.

Table 12: Actions to revise and update the implementation plan for the green strategy, Phase 3, Step 1

Task	Responsible	Possible methods
Based on Step 2, update (if necessary) specific activities in the implementation plan to correspond to the updated priority areas and specific goals.	Strategy update working group	Working groups and feedback rounds with the decision-level groups.
Recommended resources It will be helpful for the responsible to consult: <ul style="list-style-type: none"> - Current company's green strategy vision - Update priority areas and goals (Methodology to UPDATE a Green Strategy, Phase 2, Step 2) 		

- Catalogue of green solutions (Annex A)
- Best practices examples (Annex A)
- Related projects (Annex A)
- Training (Annex A)
- Tools (Annex A)

Step 2: Assign new financial mechanisms and resources to the updated strategy & implementation plan

- **Objective:** Similarly, to Step 2 (Section 4.3.2), specific financial and policy mechanisms should be assigned to the revised strategy.

- **Action:**

Table 13 can serve as a guideline of actions to assign new financial mechanisms and resources to the updated strategy & implementation plan, tasks that should be implemented, as well as the responsible people/teams and possible methods to complete those tasks.

Table 13: Actions to assign new financial mechanisms and resources to the updated strategy & implementation plan, Phase 3, Step 2

Task	Responsible	Possible methods
Revise current resources used in the existing green strategy and implementation plan and conduct a gap analysis to identify those that could support the updated priority areas, goals, and actions	Strategy update working group Financial expert Business development expert	<ul style="list-style-type: none"> • Evaluate the application and effectiveness of the already implemented mechanisms (monitoring of KPIs). • Focus groups and feedback rounds with the Leadership team, experts and advisory group.
<p>Recommended resources It will be helpful for the responsible to consult:</p> <ul style="list-style-type: none"> - Updated priority areas and goals (Methodology to UPDATE a Green Strategy, Phase 2, Step 2) - Policies to support green business models (Annex A) - Financial instruments and tools (Annex A) - Training (Annex A) 		

Step 3: Updated green strategy and implementation plan

- **Objective:** The final updated strategy and implementation plan documents should incorporate the results of the previous steps, taking into account available resources and dependencies, and setting realistic timelines. Monitoring and evaluation of key performance indicators (KPIs) help to track progress and identify areas for improvement, while risk assessment and mitigation strategies facilitate the address of potential obstacles. Finally, considering scalability and sustainability aspects throughout the strategy and implementation plan development will ensure the long-term impact of the green initiatives and the growth of the company. The strategy update working group will run this process, conducting a final

consultation round with relevant individuals within group members, and finally approve the strategy document and implementation plan.

Action:

Table 14 can serve as a guideline of actions to assign new financial mechanisms and resources to the updated strategy & implementation plan, tasks that should be implemented, as well as the responsible people/teams and possible methods to complete those tasks.

Table 14: Actions to update the green strategy and implementation plan, Phase 3, Step 3

Task	Responsible	Possible methods
Finalizing the green strategy and the implementation plan	Strategy development working group	<ul style="list-style-type: none"> • Final consultation with working group members and relevant stakeholders • Analysis of consultation feedback with the decision-level team and advisory group. Include approved changes to the final documents.
<p>Recommended resources – Material Available It will be helpful for the responsible to consult:</p> <ul style="list-style-type: none"> - Determined priority areas and their main goals (Methodology to UPDATE a Green Strategy, Phase 2, Step 2) - Derived specific goals, specific actions and responsible for implementation (Methodology to set up a NEW Green Strategy, Phase 3, Step 1) - Assign specific financial mechanisms and resources to the defined specific actions (Methodology to set up a NEW Green Strategy, Phase 3, Step 3) - Feedback from the consultation process to the final drafts of the strategy and implementation plan - Template E – Updating final strategy and implementation plan (Annex A) 		

Step 4: Define how to execute and monitor the implementation plan

This step will follow the same approach as in Step 4 of Phase 3 of the methodology to develop new green strategies, as outlined in section 4.3.2 of this document. The structure and resources that were used in that step will also be available for this phase. To prevent repetition, this step will not include the same information as before.

5. Connection between the Framework and the TOOLBOX

As already mentioned, the present framework has been incorporated in a TOOLBOX. The TOOLBOX is available in the following [LINK](#). The TOOLBOX is a multi-component platform that guides the responsible to all Phases and Steps in order to set up a new strategy, or update a current one, based on the Framework developed. It also integrates different information and resources, thus working as an elaborated repository of documents and tools. The full list of resources included in the TOOLBOX is provided in Annex A. The list identifies the resource type and format and the part of the methodology where it is made available.

6. Framework assessment

Before the finalization of the developed framework, a quality assessment was conducted in order to gather the feedback of testers and implement their suggestion to the final product. The assessment was conducted through 1) pilot studies conducted to assess the framework's applicability, reported in PR2.3 of the project and 2) internal evaluation from project partners.

In particular, the applicability of the designed framework was tested through two **separate pilot studies** conducted in A2.3 and reported in PR2.3 by Easy Mail SA. Specifically, the Strategic Planning Green Framework was implemented in two Courier/ Postal companies to verify and optimize the efficiency, feasibility, effectiveness, user-friendliness, usefulness, and quality of the Framework to meet the specific needs of the target group.

The pilot study comprised of three basic steps: pilot testers identification, pilot testers training, implementation of learning activities and pilot testers support. The two pilot testers identified were the Greek company "Easy Mail SA" and the Romanian company "Posta Romana" which were familiarized with the framework contents and training tools and then called upon to evaluate the framework.

In summary, the following feedback/ recommendations were collected for the developed framework:

- The TOOLBOX material needs some improvement or customization to suit the needs and preferences of different pilot testers, as some of them reported low satisfaction or ease of use. The suggestions of pilot testers indicate that the testers want more clarity, feedback, and customization in the TOOLBOX material. They also imply that the material may be too complex, generic, or broad for their specific needs and expectations.
- The methodology to develop a new green strategy should foster a culture of collaboration and trust among the internal and external experts, as well as the company leadership team, to ensure a smooth and successful implementation.
- The methodology to update an existing green strategy should be communicated and promoted effectively to the organization, highlighting its benefits and alignment with the organizational culture and objectives.
- The methodology to update an existing green strategy should be monitored and evaluated regularly to ensure that it is achieving its objectives and delivering its expected outcomes.
- Provide a lighter approach or a subset of toolkit materials relevant to each type of sector (technical, transport, environmental, financial, human resources, etc.).

All recommendations were addressed during the finalization of the Framework. Specifically, the GUI and user-tool interaction were improved to address issues of usability. In addition, the content of the tool itself was revised to be more precise, clear and straightforward. Lastly, the tool was enhanced through the introduction of "recommended sources", where a sources hub was constructed with links for sources useful in terms of drawing valuable insights for the green policies and options of the companies, but also in terms of better understanding the contents and the overall scope of the developed framework.

Moreover, the **internal evaluation** was conducted through a specially designed questionnaire by Eugene. The questionnaire comprised of 7 questions focusing on key aspects such as visual design and aesthetics, user friendliness, usefulness, innovation and creativeness, language and presentation, quality of presented data and communication effectiveness, using a 5-point Likert scale. To facilitate evaluation, two different relative existing frameworks were shared in the questionnaire for comparison. In total, the feedback of 7 internal testers was collected.

The questionnaire comprised of the following questions:

- 1) How would you rate on a scale of 1 to 5, the overall visual design and aesthetics of Couriers Go Green framework compared to the other two frameworks?
- 2) On a scale of 1 to 5, how useful are the tools and resources provided for facilitating and supporting of each target group activities in comparison with the other 2?
- 3) On a scale of 1 to 5, how innovative and creative are the solutions and strategies proposed in Couriers Go Green framework in comparison with the other 2?
- 4) How would you rate the quality of the data presented in Couriers Go Green framework in comparison with the other 2?
- 5) On a scale of 1 to 5, how effectively does the Couriers Go Green framework communicate its key points or core information, in comparison with the other frameworks?
- 6) On a scale of 1 to 5, how user-friendly and easy to navigate is Couriers Go Green framework in comparison with the other 2?
- 7) On a scale of 1 to 5, how clear and concise is the language and presentation of Couriers Go Green framework in comparison with the other 2?

The participation of internal testers was critical to ensuring a thorough evaluation of the framework's components and overall utility. In addition, the internal testers were equally distributed among the project partners, ensuring the robustness and transparency of the evaluation.

Responses showed consistently high ratings, with several testers answering with 5/5 for the most questions. The Framework scored an average of 4.8/5. This indicates that the framework met or exceeded internal expectations in terms of usability and quality. Such positive feedback demonstrated that the framework was ready for external testing, finalization and lasty public release. The aforementioned activities helped achieve the project's proposed quality indicators of 1) Number of internal testers that will use and evaluate the Strategic Planning Green Framework: minimum 6, 2) Number of pilot studies that will be conducted to test the applicability of the Green Framework: minimum 3) Overall partners satisfaction in relation to the level of achievement of the work package 2 objectives: minimum 80%, 4) Positive feedback from pilot study testers of the overall function of WP2: minimum 80% and 5) Quality assessment of the delivered Framework by comparing it with already potentially existing Frameworks.

7. Conclusions

Addressing the dynamic landscape of couriers and logistics, the need to develop a robust framework becomes evident, given the current sustainability challenges inherent in these sectors. From the ecological impact of transportation to the efficient management of supply chains, a comprehensive framework is essential for navigating and mitigating the complexities that inhibit the industry's sustainable evolution.

In the context of the Couriers Go Green project, a framework has been developed, in order to help couriers and logistics companies to make a green shift. Depending on the company's maturity level, the framework follows two different approaches, either to set up a new strategy or revise an existing one. In both cases, companies are invited to start with Phase 1 to assess their green status related to the status quo, the challenges, and the opportunities they face. Based on the preliminary assessment, companies are ready to start developing or updating the Green Strategy (Phase 2) and then its implementation plan assigning the necessary human and financial resources (Phase 3).

In order to validate the green framework, as integrated in the TOOLBOX, a Pilot test was performed where the Methodology to Develop a NEW Strategy and the Methodology to UPDATE an Existing Strategy showcased favourable results in terms of usability and utility. In the Usability category, the clarity and conciseness of language and presentation received high ratings from pilot testers. The NEW strategy earned an impressive average rating of 4.4 out of 5 stars (88%), signifying strong approval for its comprehensibility and organization. Similarly, the UPDATE strategy achieved positive feedback, with all testers rating the language and presentation as 4 or 5 stars, resulting in an average rating of 4.3 stars (86%). Additionally, both strategies demonstrated high user-friendliness and accessibility, with satisfaction levels of 84%. The NEW strategy, although generally well-received, displayed some variability in ratings, indicating potential areas for improvement. However, the UPDATE strategy garnered consistent positive feedback, with 90% of testers acknowledging its adaptability to changing conditions.

Moving on to the Utility aspect, both strategies aligned effectively with organizational objectives. The NEW strategy received an impressive average rating of 4.6 out of 5 stars (92%), indicating a strong agreement with the strategy's alignment with the organization's vision, mission, values, and goals. The UPDATE strategy demonstrated a high level of alignment as well, with an average rating of 4.4 out of 5 stars (88%). Furthermore, the feasibility and realism of objectives, strategies, and actions proposed in both strategies were generally well-received, with an average rating of 4.2 out of 5 stars (80%) for the NEW strategy and 4.2 out of 5 stars for the UPDATE strategy. The communication of benefits and challenges, efficient resource utilization, and incorporation of feedback and lessons learned were also positively assessed for both strategies, reflecting their effectiveness and comprehensive approach to planning.

In conclusion, the presented methodology provides a dynamic and iterative framework, promoting sustainability, and resilience in the courier and transportation sector. The integration of continuous assessment, stakeholder collaboration, and strategic planning positions companies to not only meet current environmental expectations but also to proactively address future challenges in a rapidly changing world.

References

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3. Michael Bernon, Benny Tjahjono & Eva Faja Ripanti (2018) Aligning retail reverse logistics practice with circular economy values: an exploratory framework, *Production Planning & Control*, 29:6, 483-497, DOI: 10.1080/09537287.2018.1449266
4. Corkery, Michael; Creswell, Julie (2 November 2021). "[Corporate Climate Pledges Often Ignore a Key Component: Supply Chains](#)". *The New York Times*. [ISSN 0362-4331](#). Retrieved 14 December 2021.

Annex A

Template A: Green status characterization form (Phase 1, Step 1)

This form can be used to conduct the preliminary characterisation of the company related to green transition, as suggested in Phase 1, step 1 of the methodology.

Based on the companies' maturity, they may fall into the following two categories:

- Company WITHOUT a Green Strategy
- Company WITH a Green Strategy

The factors that shall be taken into account for the preliminary characterisation in accordance with Paragraph 4.1.2 of the present report are:

- Green Operations
- Green Competencies and Skills
- Certification of skills
- <partners may add or amend as necessary>

Company Information
<i>Business name:</i>
<i>Name of the person completing the form:</i>
<i>Position:</i>
<i>Contact details:</i>
Green Shift Potential
1. Fleet Information:
<i>List and describe your current fleet of vehicles (e.g., trucks, vans, etc.).</i>
<i>Include the types of fuel used and any alternative fuel vehicles in your fleet.</i>
2. Fuel Efficiency:
<i>Provide information on the average fuel efficiency of your vehicles.</i>
<i>Mention any efforts to improve fuel efficiency or adopt cleaner technologies.</i>
3. Emissions Reduction Strategies:
<i>Outline strategies in place to reduce emissions from transportation activities.</i>
<i>Highlight any investments in eco-friendly technologies</i>
4. Route Optimization:
<i>Describe any systems or practices for optimizing delivery routes to minimize fuel consumption.</i>
5. Packaging Materials:
<i>Detail the types of packaging materials used for shipments</i>
<i>Indicate any sustainable packaging initiatives.</i>
6. Logistics and Supply Chain:

<i>Describe sustainability considerations in your logistics and supply chain processes.</i>
<i>Highlight any efforts to collaborate with suppliers for sustainable practices.</i>
7. Last-Mile Delivery:
<i>Explain your approach to last-mile delivery and any strategies for reducing its environmental impact.</i>
<i>Include information on electric vehicles or other sustainable solutions for last-mile delivery.</i>
8. Warehouse Operations:
<i>Provide an overview of sustainability practices within your warehouse operations.</i>
<i>Mention any initiatives to reduce waste and improve energy efficiency.</i>
9. Certified Green Competencies and Skills:
<i>Indicate if your management and personnel possess certified green competencies and skills.</i>
<i>Provide details about any certifications or training programs related to sustainability.</i>
10. Internal Audit for Certification:
<i>Specify if your company conducts internal audits for the certification of competencies and skills.</i>
<i>Describe the main objectives and outcomes of these internal audits.</i>
11. Strategy for Professional Development:
<i>Outline your company's strategy for continuous professional development related to sustainability.</i>
<i>Describe initiatives in place for developing and maintaining certified green competencies and skills.</i>

Template B: Assessment form (Phase 1, Step 2)

This form can be used to conduct the preliminary assessment of the current green status of company related to green transition as suggested in Phase 1, step 1 of the methodology.

The user can rate how much the company's operations cover the following priorities.

Company Information	
Legal business name:	
Name of the person completing the form:	
Position:	
Contact details:	
1. Fleet Information:	<i>Please Mark in the Scale: 1 (lowest) to 5 (Highest)</i>
The company utilises energy-efficient vehicles in the fleet.	
The fleet consumes alternative types of fuels instead of conventional.	
The company regularly updates the fleet to enhance sustainability and fuel efficiency.	
2. Fuel Efficiency:	
The company regularly monitors average fuel consumption.	
Based on monitoring results, the company proposes measures for fuel minimization or fuel efficiency improvement.	
3. Emissions Reduction Strategies:	
The company has set specific goals for emissions reductions.	
The company is regularly monitoring emissions and reporting progress towards specific goals.	
4. Route Optimization:	
The company has automations in transport operations.	
The company has invested in advanced route optimization software.	
5. Packaging Materials:	
The company uses "Green procurement" for sourcing materials and suppliers that meet environmental standards.	
The company is using eco-friendly packaging.	
The company applies a strategy for packaging minimizations.	
6. Logistics and Supply Chain:	
The company integrates sustainability considerations into logistics and supply chain processes.	
The company collaborates with suppliers adhering to sustainable	
7. Last-Mile Delivery:	
The company has installed smart delivery lockers in convenient	
The company uses alternative transportation modes like bicycles or electric scooters.	

The company has established collaboration with other relevant companies, sharing common resources.	
8. Warehouse Operations:	
The company has energy efficient buildings and equipment.	
The company is conducting life cycle management and assessment of operations.	
The company has automations in package handling operations.	
The company is implementing packaging waste reduction and recycling programs.	
9. Certified Green Competencies and Skills:	
The company uses certifications or training programs related to sustainability.	
The company is involved with management and personnel with certified green competencies and skills	
The company has a certification scheme for the certification of management and personnel "green" competencies and skills.	
10. Internal Audit for Certification:	
The company conducts 'certification of competencies and skills' internal audit / gap audit.	
11. Strategy for Professional Development:	
The company promotes employee awareness raising, training and	
The company networks with private and public organizations to advance green transition and share best practices.	
The company is using a green transition training plan/program for providing "green" competencies and skills to its management and personnel.	
The company incorporates certified green competencies and skills into its HR processes, including employment, professional development, career path, and remuneration considerations.	
Company's development in certified green competencies and skills are among the strategic objectives of the company.	
The company embraces certification of its management system to environment related international standards (e.g., ISO 14001, ISO 50001, EMAS etc.).	

SWOT analysis (Phase 1, Step 3) An Example for a Transportation Service Company

Strengths

Early Mover Advantage: Being one of the first in the industry to adopt green practices can enhance the company's reputation and position as an environmental leader.

Positive Brand Image: The green shift can boost the company's brand image and attract environmentally conscious customers.

Cost Savings in the Long Run: Transitioning to energy-efficient vehicles and practices can lead to reduced operational costs over time.

Market Differentiation: Offering eco-friendly transportation services can set the company apart from competitors and attract a niche customer base.

Weaknesses

Initial Investment: The upfront costs of transitioning to green technology and practices could strain the company's financial resources.

Operational Disruption: The implementation of new technologies and processes might lead to temporary disruptions in operations and require staff training.

Limited Infrastructure: Depending on the region, the availability of charging stations or other necessary infrastructure for green vehicles could be limited.

Resistance to Change: Employees and stakeholders might resist or struggle to adapt to new practices, potentially affecting morale and efficiency.

Opportunities

Growing Demand: Increasing awareness of environmental issues could lead to higher demand for eco-friendly transportation services.

Government Incentives: Government incentives for adopting green technologies could offset initial investment costs.

Partnerships and Collaborations: The company could form partnerships with green technology providers, further enhancing its reputation and capabilities.

Innovation and Research: The shift could stimulate internal innovation and research for new, sustainable transportation solutions.

Threats

Regulatory Changes: Rapidly evolving environmental regulations could impact operations and require constant adaptation.

Market Competition: Competitors might also adopt green practices, reducing the company's unique selling proposition.

Supply Chain Disruptions: Reliance on specific suppliers for green components could pose risks in the event of supply chain disruptions.

Consumer Perceptions: If the market doesn't value or understand the benefits of green services, there could be challenges in gaining customer traction.

Catalogue of green solutions

- <https://www.eiturbanmobility.eu/wp-content/uploads/2023/02/230116-Solution-Booklet-UFL.pdf>
- <https://www.sciencedirect.com/science/article/pii/S0959652623001567>
- https://civitas.eu/sites/default/files/CIVITAS_Replication%20Pack.pdf
- <https://greensolution.co.za/>
- <https://www.dbschenker.com/global/insights/blog?page=1>
- <https://www.agility.com/en/blog/how-green-warehouse-practices-reduce-cost-the-double-benefit-of-environmental-sustainability/>
- <https://civitas.eu/mobility-solutions>
- <https://changing-transport.org/publications/>

Best practices examples

- https://thegreen-group.com/logistics-sustainability.php?_ga=2.118675785.1717199782.1687259239-1800613559.1685537569
- <https://grow-smarter.eu/solutions/sustainable-urban-mobility/>
- <https://greencourier.co.uk/>
- <https://www.ecospeed.co.uk/>
- https://www.dpdlocal.co.uk/content/about_dpd/csr.jsp
- <https://group.dhl.com/en/sustainability/environment.html>
- <https://www.deutschepost.de/de/n/nachhaltigkeit.html>
- <https://www.citysprint.co.uk/about-us/csr/sustainable-courier>
- <https://www.absolutelycourier.com/sustainability/>

Policies to support green business models

- https://green-business.ec.europa.eu/eco-innovation_en
- https://circabc.europa.eu/ui/group/96ccdecd-11b4-4a35-a046-30e01459ea9e/library/72da759a-5d35-4756-9db4-0fd6c9b1e8ca?p=1&n=10&sort=modified_DESC
- https://transport.ec.europa.eu/transport-themes/sustainable-transport_en

Financial instruments and tools

- <https://www.eiturbanmobility.eu/impact-ventures/eit-urban-mobility-startup-investments/>
- <https://www.2zeroemission.eu/who-we-are/2zero/>
- https://commission.europa.eu/business-economy-euro/economic-recovery/recovery-and-resilience-facility_en
- <https://digital-strategy.ec.europa.eu/en/activities/digital-programme>
- <https://marketplace.eiturbanmobility.eu/opportunities?go-to=smart-mobility-in-cabin-sensors>
- <https://www.eiturbanmobility.eu/>
- https://investeu.europa.eu/index_en
- https://commission.europa.eu/strategy-and-policy/eu-budget/performance-and-reporting/programme-performance-statements/instrument-pre-accession-assistance-ipa-iii-performance_en
- https://commission.europa.eu/funding-tenders/find-funding/eu-funding-programmes/horizon-europe_en
- https://commission.europa.eu/funding-tenders/find-funding/eu-funding-programmes/european-regional-development-fund-erdf_en
- https://commission.europa.eu/funding-tenders/find-funding/eu-funding-programmes_en#heading-2-cohesion-and-values
- https://commission.europa.eu/funding-tenders/find-funding/eu-funding-programmes/connecting-europe-facility_en

Related projects

- <https://ulaads.eu/>
- <https://decarbomile.eu/>
- <https://urbanized.eu/>
- <https://www.urbane-horizoneurope.eu/>
- <https://greenlog-project.eu/>

Training

- <https://urbanmobilitycourses.eu/>
- https://coursersgogreen-83564.bubbleapps.io/version-test/knowledge_hub?lang=en_us
- <https://www.futurelearn.com/courses/sustainability-and-green-logistics-an-introduction>
- <https://www.green-courier.eu/index.php/online-current-state/?lesson=4>
- https://www.edx.org/learn/supply-chain-management/massachusetts-institute-of-technology-sustainable-supply-chain-management?utm_campaign=mitx&utm_medium=partner-marketing&utm_source=referral&utm_content=sustainable-landing
- <https://www.green-courier.eu/index.php/e-course-2/>
- <https://civitas.eu/learning-centre>

Tools

- <https://green-driving.jrc.ec.europa.eu/>
- <https://civitas.eu/tool-inventory>
- <https://changing-transport.org/tools/>

Template C: Strategy document (Phase 2, Step 4)

Creating a draft of a strategy document involves the initial stages of planning and organizing your thoughts before refining and finalizing the document. Here's a step-by-step approach to help you create a strategy document draft:

- **Define the Document's Purpose:** In this step, you clearly articulate the purpose and scope of the strategy document. It sets the foundation for the entire document and helps guide the subsequent sections.
- **Research and Gather Information:** Thorough research is essential to gather relevant data and information related to green shift strategies in the courier and logistics industry. This step involves examining industry trends, best practices, regulatory requirements, and other sources to inform your strategy.
- **Outline the Document:** Creating an outline helps structure your thoughts and organize the content flow of the strategy document. It provides a roadmap for the subsequent sections and ensures coherence and logical progression.
- **Executive Summary:** The executive summary is a concise overview of the strategy document, that highlights its key points and Objective. It provides a top-level summary of the green shift strategies and their potential benefits.
- **Introduction:** This section gives background information on the courier and logistics industry, emphasizing the need for greener operations. It may also touch upon the environmental challenges and opportunities in the industry.
- **Vision and Mission:** This section outlines the desired future state (vision) and the overall purpose (mission) of the green shift strategies. It establishes the guiding principles and aspirations of the courier and logistics company in terms of sustainability.
- **Goals and Objectives:** Here, you define specific goals and objectives that align with the vision and mission. These should be measurable, time-bound targets that address various aspects of greener operations, such as reducing carbon emissions, optimizing fuel consumption, or implementing sustainable packaging practices.
- **Strategy Development:** In this step, you outline the specific strategies and approaches to achieve the goals and objectives identified earlier. These strategies may include adopting alternative fuel vehicles, optimizing delivery routes, implementing recycling programs, and leveraging technology for efficiency improvements.
- **Action Plan:** The action plan section details the specific actions, tasks, and initiatives required to implement the identified strategies. It may include timelines, responsible stakeholders, and resource allocation to ensure systematic and effective execution of the green shift strategies.
- **Risk Assessment:** A comprehensive risk assessment helps identify potential challenges, barriers, and risks associated with the implementation of the strategy. This step involves evaluating environmental, operational, financial, and regulatory risks and developing mitigation strategies.
- **Conclusion:** The conclusion section summarizes the key points discussed throughout the document, emphasizing the importance of greener operations in the courier and logistics industry and reiterating the company's commitment to sustainability.
- **Review and Revise:** After creating the draft, it is crucial to review and revise the document for clarity, coherence, and completeness. This step ensures that the strategy document effectively communicates the green shift strategies and can be easily understood and implemented by relevant stakeholders

Template D: Final strategy and implementation plan (Phase 3, Step 3)

Task	Responsible	Possible methods
Identify key performance indicators (KPIs)	Sustainability expert /Operations team	Define specific, measurable, achievable, relevant, and time-bound (SMART) KPIs to track the progress of the goals.
Realistic timelines	Operations team	Develop a realistic timeline for implementing different aspects of the green initiatives, taking into account resource availability and dependencies.
Resource allocation	Operations team	Ensure that sufficient resources, including personnel, budget, and technology, are allocated to support the implementation of the green framework.
Risk assessment and mitigation	Environmental expert	Identify potential risks and challenges associated with implementing green initiatives and develop strategies to mitigate them.
Monitoring and evaluation	Operations team	Implement a monitoring system to track progress towards the Objective of the green framework. Regularly evaluate performance and make adjustments as necessary.
Training and support	Training Manager/Operations Manager	Provide training and support to employees to enable them to adopt sustainable practices and implement green initiatives effectively.
Documentation and communication:	Communication and Marketing Manager	Maintain comprehensive documentation of the green initiatives, including policies, procedures, and performance data. Communicate the company's sustainability efforts and progress transparently to stakeholders.

Template E: Update final strategy and implementation plan (Phase 3, Step 3)

Task	Responsible	Possible methods
Review and Upgrade Existing Strategy Documentation	Sustainability Manager	Evaluate the points of the existing strategy and determine necessary upgrades based on feasibility and current goals.
Define Clear Objective	Project manager	Ensure that Objectives are specific and aligned with the overall project goals.
Review and Adjust Timelines	Operations Manager	Review proposed timelines for each task and milestone, ensuring they are realistic and achievable considering available resources, team capacity, and dependencies.
Assess Resource Allocation	Operations Manager	Evaluate the availability of resources required for successful implementation, including human resources, financial resources, equipment, and technology.
Identify and Mitigate Risks	Project Manager	Identify potential risks and challenges that may arise during implementation, evaluate their impact, and develop strategies to mitigate and address them effectively.
Establish Monitoring and Evaluation Mechanisms	Quality Assurance Manager	Establish mechanisms to track and evaluate the performance of implemented initiatives regularly.
Address Training and Support Needs	HR Manager	Develop appropriate training programs or support mechanisms to bridge gaps and ensure sufficient support for successful implementation.
Assess Scalability and Sustainability	Communication Manager	Consider the potential for future growth or expansion, ensuring the implementation plan accounts for scalability and long-term viability.
Establish Lessons Learned and Continuous Improvement	Operations Manager	Use this feedback to identify areas for improvement and drive continuous improvement efforts.

Annex B

Table 15: List of resources to be made available in the TOOLBOX through steps and phases

Case	Category	no.	Title/Link Categories	Resource Type	Phase	Step	Status
A	Resources or steps in Phase 1	1	“Measure my Green Readiness” Self-Assessment Tool	Online tool	1	2	To be developed after the completion of this document
	Resources or steps in Phase 2	2	Catalogue of green solutions / Best practices examples / Policies to support green business models / Related projects / Training	Link	2	2	Integrated
		3	Policies to support green business models / Financial instruments and tools / Related projects / Training	Link	2	3	Integrated
	Resources or steps in Phase 3	4	Catalogue of green solutions / Best practices examples / Related projects / Training / Tools	Link	3	1	Integrated
		5	Policies to support green business models / Financial instruments and tools / Training	Link	3	2	Integrated
		6	Catalogue of green solutions / Best practices examples / Related projects / Training / Tools	Link	3	4	Integrated
B	Resources or steps in Phase 1	7	“Measure my Green Readiness” Self-Assessment Tool	Online tool	1	2	To be developed after the completion of this document
	Resources or steps in Phase 2	8	Catalogue of green solutions / Best practices / Training	Link	2	1	Integrated
		9	Catalogue of green solutions / Best practices examples / Related projects / Training	Link	2	2	Integrated

Case	Category	no.	Title/Link Categories	Resource Type	Phase	Step	Status
	Resources or steps in Phase 3	10	Catalogue of green solutions / Best practices examples / Policies to support green business models / Related projects / Training	Link	2	3	Integrated
		11	Catalogue of green solutions / Best practices examples / Related projects / Training / Tools	Link	3	1	Integrated
		12	Policies to support green business models / Financial instruments and tools / Training	Link	3	2	Integrated
		13	Best practices examples / Related projects / Training / Tools	Link	3	4	Integrated