



# PHOENIX 4.0

## Call for Competition Info Session

Empowering Tourism SMEs for a  
Sustainable Future

January 2026



Co-funded by  
the European Union



ÍSLENSKI  
FERÐAKLASINN  
Iceland Tourism Cluster



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the European Union

### SMP-COSME-2023-TOURSME

Project number: 101181258

Project starting date: 1  
November 2024

Project end date: 31 August  
2027

Duration: **34 months**

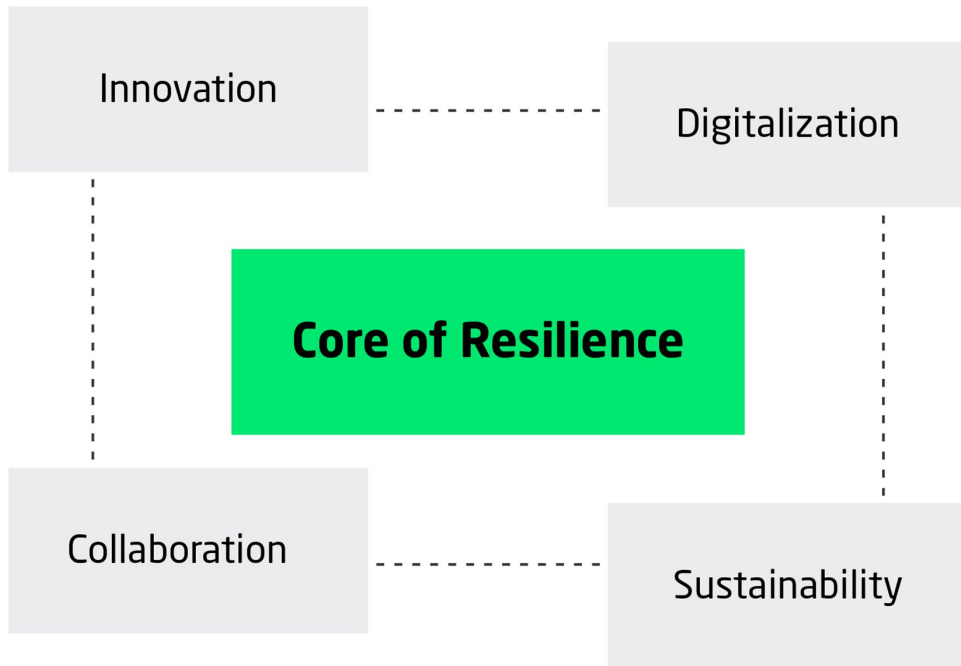


Max grant amount:  
**2.110.134 EUR**

Tourism SME  
support:  
**1.065.000 EUR**

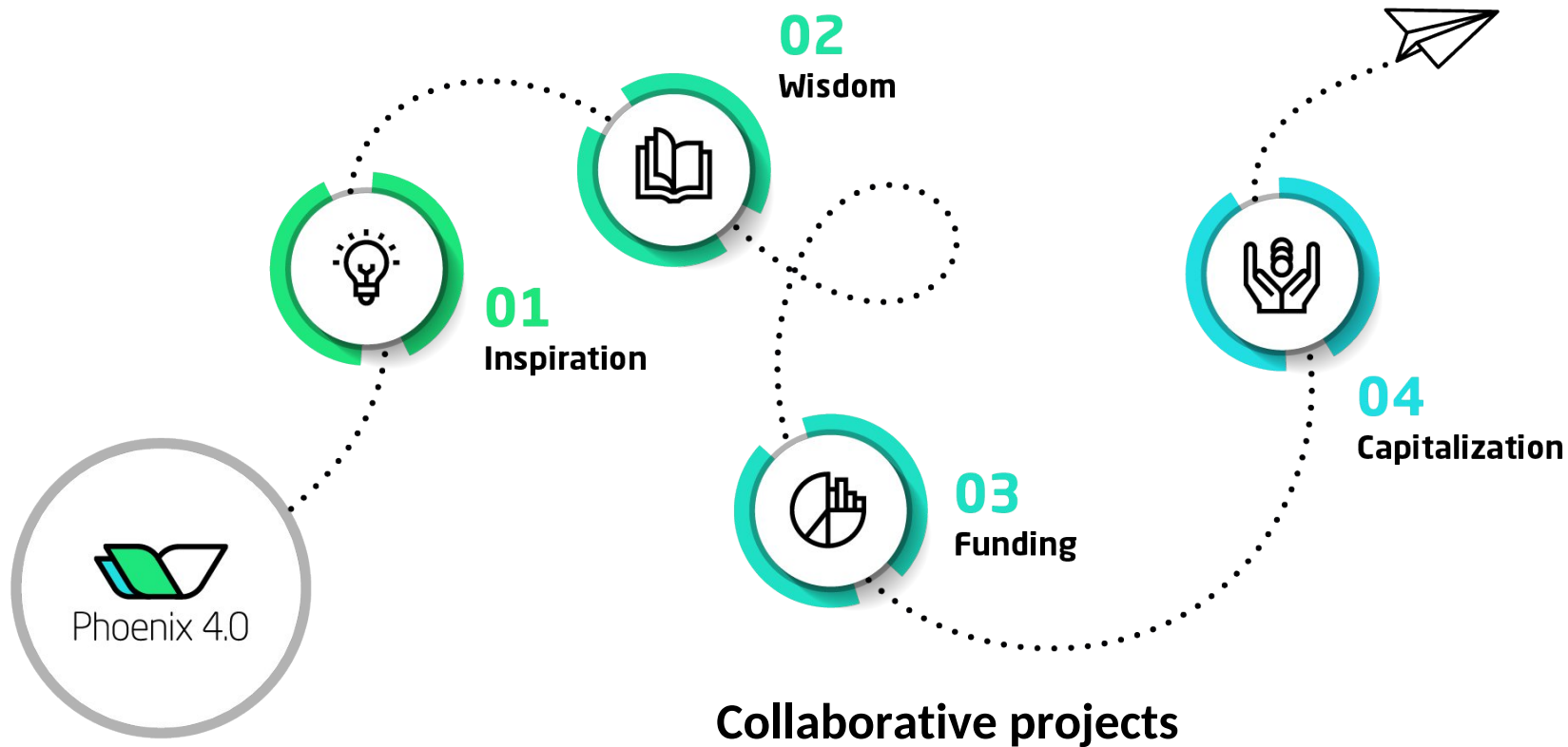


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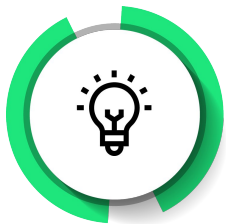


# Tourism SMEs



  
Phoenix 4.0





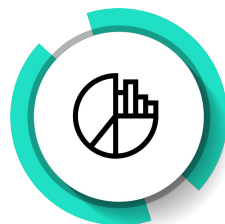
## 01 Inspiration

- Pathway Pioneers  
Compendium of Tourism best practices
- Blueprint for Resilient Tourism



## 02 Wisdom

- **SMEs Trainings**  
Resilience - Risk management  
Responsible and diversified tourism offer,  
challenges seasonality, social impact  
Management of tourism offerings and  
visitor flows  
Resilience and sustainability training  
Awareness raising campaigns  
Accessible tourism services
- **PHOENIX 4.0 Academy & Lab**
- **Risk and Management Education and  
Planning Guide**



## 03 Funding

Collaborative projects



## 04 Capitalization

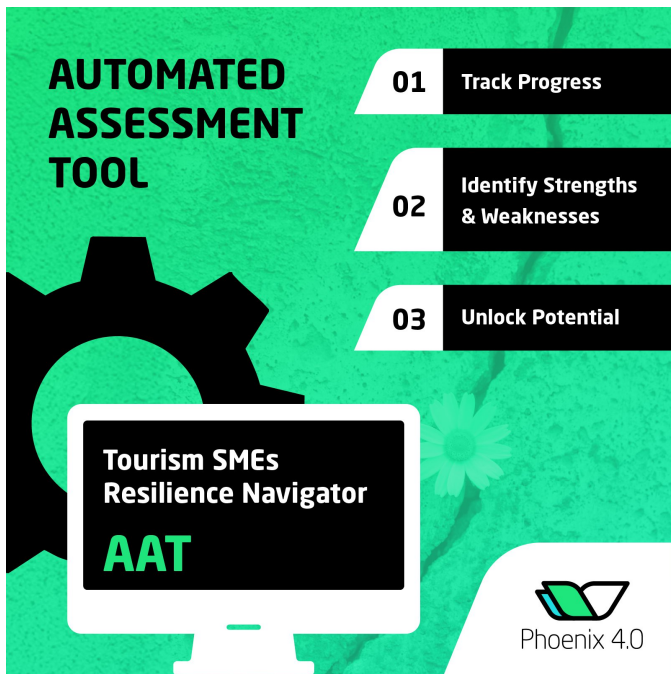
Knowledge & results sharing





## Don't miss

- Next training sessions for SMEs from 13 to 23 April
- [Resilience Navigator Tool](https://www.phoenix4tourism.eu/resilience-navigator-tool)




The graphic features a green background with a large black gear on the left. On the right, three white boxes with black text are stacked vertically, numbered 01 to 03. At the bottom left, a white computer monitor displays the text 'Tourism SMEs Resilience Navigator' and 'AAT' in green. At the bottom right, the Phoenix 4.0 logo and text are visible.

**AUTOMATED ASSESSMENT TOOL**

- 01 Track Progress
- 02 Identify Strengths & Weaknesses
- 03 Unlock Potential

Tourism SMEs Resilience Navigator  
**AAT**

  
Phoenix 4.0

- Advanced data collecting tool - quantitative and qualitative data.
- Automatic report with personalised recommendations for individual SME.
- Real-time crisis management and long-term planning, a better preparedness for future challenges.

<https://www.phoenix4tourism.eu/resilience-navigator-tool>



# PHOENIX 4.0 Connect Learning Platform

[phoenix4tourism.eu/](https://phoenix4tourism.eu/)



Digital platform

## Main content

Phoenix 4.0 Academy  
Trainers ToolKit  
Phoenix 4.0 Lab  
Pathway Pioneers  
Awareness raising  
Tourism SMEs  
Resilience Navigator

## Corporate content & contact

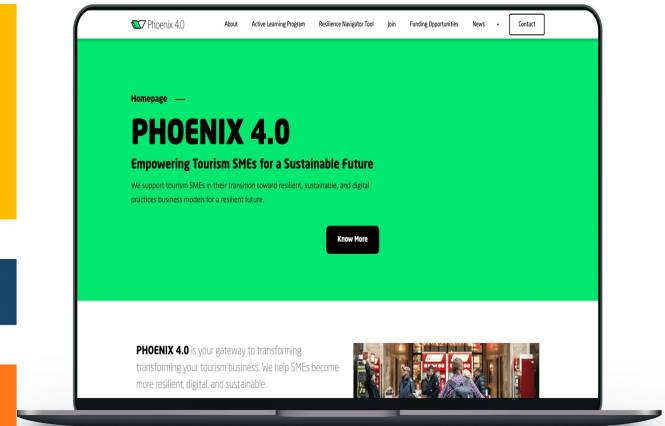
Partners  
About us  
Contact  
Press  
Events calendar

## Content providers

PHOENIX 4.0 Partners  
Associated Partners  
Trainers & experts

## TourBIZZ Community

## Social Network





## The Call in a Nutshell

- **Eligible Countries/Regions:** Croatia (only Dubrovnik), France, Iceland, Kosovo, Slovenia, and Spain (In two separate partners: Catalonia and other regions)
- **€25,000** per collaborative project for most regions, **€15,000** per collaborative project for those based in Kosovo.
- **Total Projects:** At least **45 collaborative** projects will be funded.
- **Funding Rate:** **100% Lump Sum** (No complex financial reporting based on costs).
- **Project Duration:** **9 months**, tentatively from July 2026 to March 2027.
- **Eligible applicants:** Lead applicants must be **Tourism SMEs** and projects must have from **2 to 5** independent organizations.





# Objectives of the Call

The Alliance Initiatives Programme funds projects that address one or more of these **six key thematic topics**. These topics are designed to tackle specific challenges through innovation and cooperation.

**1 Educate, plan and manage risks to enhance the resilience of tourism SMEs**

**2. Shape tourism offerings by considering factors such as seasonality, social impact and challenges to promote responsible and diversified tourism while mitigating the effects of overtourism.**

**3. Develop tools and methodologies to improve the management of tourism offerings and visitor flows.**

**4. Strengthen knowledge, awareness and skills related to resilience and sustainability among mid- and top-level management in tourism SMEs.**

**5. Design effective campaigns to raise awareness on key issues such as heritage preservation and climate action.**

**6. Create accessible tourism services to ensure inclusivity for all visitors.**





# Key challenges

Applicants must address one or more of these specific challenges within their chosen topic.

## Topic 1. Educate, plan, and manage risks to enhance the resilience of tourism SMEs

- Bridging the gap between theory and practice in **sustainable tourism**.
- Activating **territorial resilience** through storytelling, local cooperation, and heritage-based experiences.
- Improving **energy efficiency and circular practices** in tourism SMEs.
- Using **data** to anticipate risks and understand visitors.
- **Human resources and financial** preparedness.

## Topic 2. Responsible and Diversified Offerings

- Developing flexible and sustainable offers to **reduce seasonality**.
- Ensuring **stability and sustainable living conditions** for the seasonal workforce.
- Human-centred approaches to managing **overtourism**.
- **Collaboration and shared value creation** between all tourism actors and across sectors.

## Topic 3: Develop tools and methodologies to improve the management of tourism offerings and visitor flows.

- Optimizing **visitor flows** through data and digital solutions.
- Digital literacy and skills for **smart tourism management**.
- Improving **digital connections and integration** for tourism SMEs.
- Reducing the **carbon footprint** of visitor mobility.



# Key challenges

Applicants must address one or more of these specific challenges within their chosen topic.

**Topic 4: Strengthen knowledge, awareness and skills related to resilience and sustainability among mid-and top-level management in tourism SMEs.**

- Practical **sustainability training** and mindset shift.
- Formalizing **sustainability practices and certifications**.
- **Digital monitoring** for resource efficiency and resilience.
- **Cybersecurity** and risk management.

**Topic 5: Design effective campaigns to raise awareness on key issues such as heritage preservation and climate action.**

- Credible, transparent and actionable **sustainability communication**.
- Motivating **responsible visitor behaviour**.
- Designing targeted campaigns to promote **off-peak visitation and responsible tourism**.
- Fostering **social sustainability and hospitality**.

**Topic 6: Create accessible tourism services to ensure inclusivity for all visitors.**

- Clear and consistent **communication of accessibility**.
- Training and mindset shift for **accessible tourism**.
- Formalizing **accessibility strategies, plans and assessments**.





## Eligibility Criteria – Administrative (1/3)



-Lead partners must be  
**Tourism SME**

-Registered in the  
PHOENIX 4.0 community

-Complete the Resilience  
Navigator Tool (before and  
after the project starts)

- I5510 — Hotels and similar accommodation
- I5520 — Holiday and other short-stay accommodation
- I5530 — Camping grounds, recreational vehicle parks and trailer parks
- I5610 — Restaurants and mobile food service activities
- I5630 — Beverage serving activities
- N79 — Travel agency, tour operator reservation service and related activities
- R90 — Creative, arts and entertainment activities
- R93 — Sports activities and amusement and recreation activities.





# Join the PHOENIX 4.0 community

<https://www.phoenix4tourism.eu/how-to-join>

For SMEs

For Trainers

## Eligibility Check

### Self-Assessments

Determine if your business meets the eligibility criteria for PHOENIX 4.0

### Simple Application

Submit a quick and straightforward application to kickstart the process

### Review & Feedback

Receive personalized guidance on your eligibility status and next steps

## Access to Training & Funding

### Capacity-Building Programs

Participate in tailored workshops and training sessions

### Financial Support

Unlock grants and financial incentives to boost your growth

### Mentorship Opportunities

Learn from industry experts in digital marketing, sustainability, and crisis management

### Phoenix 4.0 Academy

Enhance your team's skills with practical and strategic insights

## Adoption of Digital & Sustainable Practices

### Personalized Roadmaps

Get bespoke strategies to transform your business digitally and sustainably

### Digital Tools & Resources

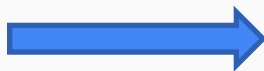
Access technology solutions that improve efficiency and visibility

### Sustainability Coaching

Implement eco-friendly practices that align with modern tourism trends

### Ongoing Support

Benefit from continuous advice and resources to help maintain your progress



Application Form



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## Eligibility Criteria – Administrative (2/3)



### Partnership size

Consists of minimum **2** and a maximum of **5** independent organisations

Only the lead tourism SMEs will receive the financial support directly.

Other partners (e.g., public, private or non-profit entities instrumental to the project) will receive funding from the lead applicant.

At least 50% of the partners in each partnership must be tourism SMEs.

Partnerships may be either national (all partners from the same PHOENIX 4.0 partner country) or transnational (partners from different eligible SMP-COSME countries). **Only partners registered in PHOENIX 4.0 partner countries may receive financial support.**





## Eligibility Criteria – Administrative (3/3)



Each organisation may participate in **only one application** as a lead applicant or a partner.

And must not have received financial support under other projects funded by the Call for Proposals SMP-COSME-2023-TOURSME.

State Aid “**De minimis regime**”: Not applicable, in principle, but check with the relevant national/regional authorities





# Eligibility Criteria - Technical

## Project types (or consortium types)

Every proposal must choose one of the following three collaboration structures:

### Type 1: Tourism SMEs-Only

- **Composition:** Exclusively of 2–5 independent tourism SMEs.
- **The Profile:** Ideal for businesses in the same sector (e.g., three hotels) or complementary tourism services (e.g., a hotel + a tour guide + an activity provider).
- **Example:** two or three hotels (SMEs) that develop a digital platform together.

### Type 2: Tourism Ecosystem

- **Composition:** 1 Lead Tourism SME + broader tourism ecosystem stakeholders .
- **Eligible Partners:** Can include Destination Management Organizations (**DMOs**), **NGOs**, Universities, Training Centers, or Research Institutions...
- **Example:** a hotel (SME)+ a DMO and/or university.

### Type 3: Cross-Sectoral

- **Composition:** 1 Lead Tourism SME + SMEs / entities from **non-tourism sectors**.
- **Allied Sectors:** Agriculture (Agrotourism), Creative Industries (Arts/Culture), Tech companies, or the Social Economy...
- **Example:** a hotel (SME) + a business of 4D projection.

**Tourism SMEs must receive the majority of the financial support.**

**In all collaboration types, tourism SMEs must represent at least 50% of the partnership.**





# Eligibility Criteria – Type of purchase (1/4)

## Eligible activities and costs:

- Implementation of new business ideas, new products' development, market studies; development and analysis of business plans; intellectual property development; such as consultants, experts, mentors, etc. offering advice on business plan development, Business modelling, IP protection, conducting market studies, etc.; such as design, development, testing of a prototype or other innovation measure.
- Design and implementation of measures on corporate social responsibility, ethic and conduct codes; due diligence (OECD guidelines) women's role in management jobs, accessibility (disable, elderly, children), LGBT, socially responsible job offers, value chain integration of social responsibility.
- Digital innovative projects that promote accessibility.
- Acquisition of software licenses.
- Development and implementation of new digital tools for tourism such as artificial intelligence, augmented reality, fine tuning algorithms.





## Eligibility Criteria – Type of purchase (2/4)

- Entry fees and travel costs to business meetings, trade fairs, training, provided that these are related specifically to the activities eligible for the financial support and they are organised externally to the consortium.
- Certification costs and implementation costs related to the certification schemes compliance relevant to sustainability, digitalisation and resilience
- Promotion and communication activities relevant to the activities in this list.
- Purchase costs of consumables / goods are eligible only if they contribute to resilience, green or digital transformation, and they must arise from the capacity building actions carried out by the consortium such as training, coaching or tailored consulting for SMEs. A maximum of 30% is permitted.





## Eligibility Criteria – Type of purchase (3/4)



### Compulsory costs

- Travel, accommodation and subsistence costs to participate in the PHOENIX 4.0 final conference to be held in Ljubljana (Slovenia) in Spring 2027.
- Minimum 1 representative per consortium is required to showcase the results and achievements.
- A fixed allocation of 1,000€ shall be foreseen in the project budget out of the overall grant received.





## Eligibility Criteria – Type of purchase (4/4)



### NON-eligible costs:

- Capacity-building activities provided by the consortium or by the trainers trained as part of activities “Capacity building for key tourism stakeholders (train the trainers)” in WP3;
- Coaching and consulting services provided by the consortium as part of activities “Advising and tailored consulting activities, and technical support” in WP4;
- Services provided by consortium or subcontractors;
- Vouchers or other non-financial support;
- Purchase of **infrastructure**.
- Financial support cannot be used to reimburse or purchase services from:
  - The members/partners of the PHOENIX 4.0 consortium;
  - Any persons with powers of representation within the SME acting as lead applicant in the collaborative project;
  - Service providers affiliated with any of the partners listed in the Collaborative Project Partnerships.
- Any expense that is not foreseen as eligible.
- **Staff costs**





## Your budget: Balanced and well-justified



The budget must be clearly linked to the project's activities, deliverables, and expected results.



Each budget line item must be justified in the context of the project's objectives.



An unbalanced financial plan (for example, allocating more than 30% of the budget to consumables and/or goods) is a common mistake that can penalise your proposal.



Purchases of consumables and goods are not automatically eligible. They must clearly support resilience, green or digital transformation and result from project capacity-building activities (e.g. training, coaching or consulting). A maximum of 30% of the total budget is permitted.



Equipment can be eligible **only** if it is small-scale, justified as project **goods**, directly linked to capacity-building activities, and clearly contributes to the project deliverables.



Remember: internal salaries and infrastructure purchases cannot be funded with this grant.



The mandatory €1,000 for the final conference in Ljubljana is part of the total project budget.





## **Transnational Collaboration (Optional Bonus)**

**What it is:** A consortium including at least two eligible entities from different PHOENIX 4.0 partner countries.

Any of the three project types above can be implemented as a **Transnational** partnership.

**Participating Territories:** Croatia (Dubrovnik), France, Iceland, Kosovo, Slovenia, and Spain. Entities from other SMP-COSME eligible countries may participate as partners with €0 budget (no financial support under this Call).

**Scoring Bonus:** Transnational projects receive an **extra +5 points** in the final ranking (provided if they reach the minimum eligibility score of 50/100).





## Funding scheme (1/3)

- Each selected project will be awarded a fixed lump sum grant of **€25,000** (€15,000 for Kosovo based projects).
- A total of 45 collaborative projects will be supported under the PHOENIX 4.0 Alliance Initiatives, following this indicative distribution:
  - Type 1 – Only Tourism SMEs: 8-29 projects
  - Type 2 – Tourism SMEs + ecosystem actors (e.g. DMOs, NGOs): 8-29 projects
  - Type 3 – Tourism SMEs + cross-sector SMEs: 8-29 projects
- Out of the total, at least 5 projects are estimated to be transnational collaborations, applicable across any of the three types above.





## Funding scheme (2/3)

- Territorial restrictions apply for Catalonia and Dubrovnik, in line with their institutional mandates:
  - Catalonia: eligible only for entities with an operational centre in the Catalonia Region.
  - Dubrovnik (Croatia): eligible only for entities registered in the City of Dubrovnik, Konavle, Župa Dubrovačka, and Dubrovačko Primorje.
- Applicants are required to complete the budget breakdown, justifying how the requested funds will be used to ensure the feasibility of the project and the achievement of its objectives. The budget breakdown template (Annex F. Budget Breakdown Template v2) is available for download on the PHOENIX 4.0 website and must be used for the application.





## Funding scheme (3/3)

It is estimated that at least 45 collaborative projects will be supported following this indicative distribution:

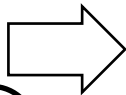
<b>Region/Country</b>	<b>Partner</b>	<b>No. prj</b>	<b>Budget</b>
Dubrovnik	DURA	6	€150,000
France	OTL	6	€150,000
Iceland	ITC	5	€125,000
Kosovo	REA	6	€90,000
Slovenia	ARCTUR	6	€150,000
	CBE	5	€125,000
Spain (not.Catalonia)	ANYSOL	5	€125,000
Catalonia	CTB	6	€150,000



# Application steps

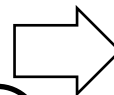


## 1. Administrative



- **Mandatory** to pass the eligibility check.
- All required fields must be accurately and fully completed
- The data collected will be handled in compliance with **EU data protection** regulations (e.g., GDPR) and used solely for the purpose of managing the call and grant
- Official document confirming the **legal status** of the applicant (registration certificate)
- Proof of **Identity** of the legal representative (ID or Passport)

## 2. Technical



- **Technical description**
- **Budget** breakdown / Project financial plan
- **Partnership Agreement**
- Language
- **Online:** phoenix4tourism.eu
- strongly encouraged to apply early and not wait until the last minute
- Contact regional contact point for any technical issues during submission

## 3. Pitch

- **Tourism Transition National Demo Day**
- Country/regional level - in local language - online
- Projects present their application in 5 minutes
- Tentatively during the week of **23–26 March**.





# Evaluation Criteria



<b>Criterion</b>	<b>Weight</b>
<b>Feasibility</b>	<b>10%</b>
<b>Innovation and Creativity</b>	<b>20%</b>
<b>Replicability and Transferability</b>	<b>10%</b>
<b>Collaboration and Partnership Potential</b>	<b>20%</b>
<b>Efficiency and Cost Effectiveness</b>	<b>10%</b>
<b>Resilience and Sustainability Potential</b>	<b>20%</b>
<b>Contribution to the Transition Pathway for Tourism</b>	<b>10%</b>

Projects must score at least 50/100 to be eligible, and 50% of points per individual criteria.

Additionally,

- transnational projects will receive an additional 5 points;
- 5 extra points awarded for the pitch evaluation.

The highest-ranking projects per country or region will be funded until the budget is exhausted.





# Post-award process

## Preparation of the Contract

## Implementation of the Contract (from July 2026 – March 2027)

### Duties of projects:

- **Inception questionnaire**, to be completed in September 2026;
- **Mid-term questionnaire and personal interview**, to be completed by November 2026;
- **Final Report**, to be provided within one month after finishing the project, including proof of the deliverables committed in your application.

### Payment terms:

- **First Installment (40%)**: Paid upfront within 30 days of signing the Grant Contract.
- **Final Balance (Up to 60%)**: Paid after the project ends, following the approval of the final report and deliverables.

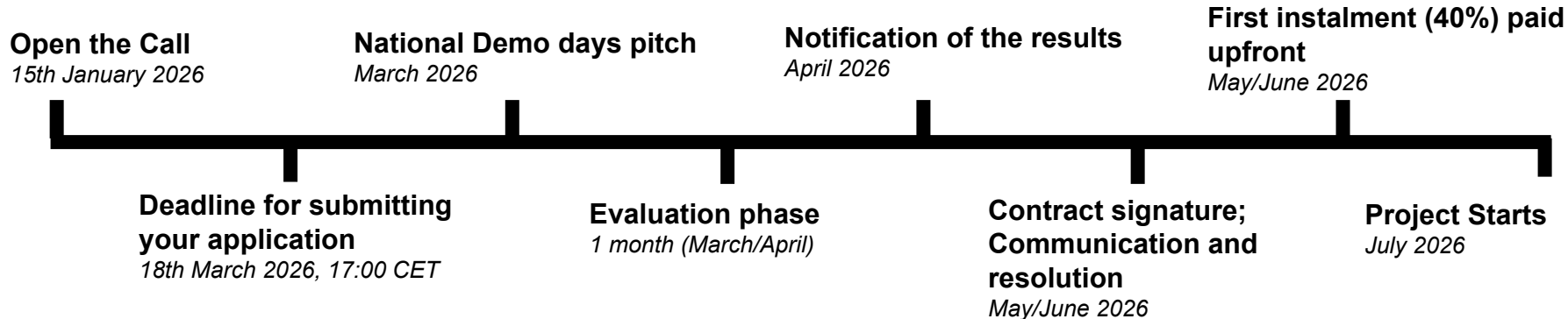
### Lump Sum Reporting Logic

- **Result-Oriented**: Financial reporting is not based on individual receipts or cost declarations.
- **Deliverable-Based**: Payment is triggered by the achievement of objectives and the submission of committed outputs (e.g., a finished sustainability plan or a functioning digital tool).





# Timeline (1/2)





# Timeline (2/2)





# Contacts

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<b>Territory</b>	<b>Organization</b>	<b>Contact</b>
<b>General</b>		<a href="mailto:phoenix4_0@arctur.si">phoenix4_0@arctur.si</a>
<b>Slovenia</b>	ARCTUR	lucija.barisic@arctur.si
<b>Slovenia</b>	Centre of Business Excellence	iana.bilynets@ef.uni-lj.si
<b>Iceland</b>	Iceland Tourism Cluster	olofyrr@icelandtourism.is asta.kristin@icelandtourism.is
<b>Kosovo</b>	Prishtina Rea	prishtinarea@yahoo.com
<b>Dubrovnik (Croatia)</b>	Dubrovnik Development Agency	mpuljas@dura.hr
<b>Spain</b>	Catalan Tourist Board for projects in Catalonia	msantaeulalia@gencat.cat
<b>Spain</b>	Anysolution for projects in Spain except Catalonia	lthomas@anysolution.eu
<b>France</b>	Open Tourism Lab	ebobin@opentourismelab.com

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# COMMON MISTAKES

- Participating in more than one application (as a lead or a partner)
- Including non-eligible partners
- Including internal salary or personnel costs (not eligible under the lump-sum scheme)
- Proposing activities not directly linked to the project objectives, deliverables, or selected topic
- Submitting unclear or unrealistic project plans within the 9-month timeframe
- Weak justification of the connection between the budget and project deliverables
- An unbalanced financial plan (e.g. excessive purchases or poorly justified cost allocation)
- Unclear partnership roles and responsibilities
- Missing or incomplete mandatory attachments



“Please also consult the FAQ, which is part of the Call documentation.





# Practical tips for a successful application

- **Don't wait until the last minute:** Submit your application well in advance to avoid technical or connectivity issues.
- **Check the FAQ section:** Many questions are already answered on the official PHOENIX 4.0 website.
- **Language:** you are encouraged to complete the online application in English. other programme language are also accepted, but an English summary must be included.
- **Verify the eligibility of all partners:** Make sure every partner meets the criteria and that the lead is a tourism SME.
- **Justify your budget clearly:** The budget must make sense within
- the scope of your project.





# PHOENIX 4.0 LAB & NATIONAL INFO SESSION

Phoenix Lab & Academy —

## Innovate, Learn, and Grow

**Hands-On Learning, Smart Tools, and Expert Training  
for a Thriving Future**

The **Phoenix Lab & Phoenix Academy** equips tourism SMEs with the tools, training, and insights to innovate and grow. Through **hands-on Lab experiments, expert-led Academy courses**, businesses gain the skills to thrive in a digital and sustainable future.

<https://www.phoenix4tourism.eu/lab-and-academy>



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# Q&A



**Thank you for  
your  
engagement!**

