TOURISM4.0

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Call for the selection of Tourism SMEs

Application guidelines

TOURISM4.0
Capacity building and peer-learning transnational supporting scheme
towards smart, innovative, and sustainable tourism

CALL FOR THE SELECTION OF TOURISM SMEs

Application Guidelines

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1. INTRODUCTION

The Tourism4.0 project aims at developing a capacity building, technology transfer, support, and assistance program to enable tourism sector SMEs to adopt and leverage emerging digital technologies, to improve their productivity, sustainability, and overall business performance.

The main types of activities that will be carried out during the implementation of the project are:

1. Technical and business assistance
2. Peer learning, training, and awareness support
3. Financial support to tourism SMEs.

More specifically, the project objectives will be achieved by:

1) Setting up a networking platform that will bring SMEs, technology providers, public authorities, and tourism stakeholders to build an ecosystem for knowledge transfer, peer learning, and innovation uptake.

2) Developing a funding scheme to assist tourism SMEs in digital transformation and innovation uptake, through Innovation & Feasibility Assessment Projects, in cooperation with innovation service providers.
3) Digital technologies skills upgrading, mentoring, and assistance program run by technology/business experts to build capacity, know-how, and technology transfer opportunities.
4) Supporting smart innovation and new initiatives via partners from cross-disciplinary areas including ICT, digital technologies, and sustainability.
5) Use case identification or flagship initiatives to demonstrate SMART tourism solutions to allow for the cross-regional and transnational transfer of best practices.
6) Promoting workshops/webinars/conferences on new trends and routes for post-Covid recovery, including networking with public/private tourism stakeholders and investors.

In particular, the project will train, assist, deploy, and showcase promising emerging digital technologies (e.g. data management and artificial intelligence, blockchain, internet of things, communications systems, cyber security, etc.) that represent added value for the tourism sector business (especially SMEs).

Based on the first activities carried out, the project partnership has established specific needs, issues, and challenges faced by tourism SMEs, particularly in the hospitality and tourism services trade.

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Supported by open innovation and challenging initiative, Tourism4.0 brings a valuable opportunity for co-design and joint collaboration between “problem owners” and “problem solvers”.

During the program, and through a process of business matchmaking, “problem owners” carrying out feasibility/viability initiatives towards digital transformation and innovation adoption will have the opportunity to engage directly with “problem solvers”.

This model creates a win-win approach, where “problem owners” engage to address digitalization business needs and acquire the relevant know-how and expertise to initiate digital transformation and adoption, while at the same time “problem solvers” have an opportunity to engage, test, and validate their value propositions with end-users (potential customers).

In addition, “problem solvers” will have the opportunity to be showcased through our platform, thus creating more awareness and visibility of their tourism solutions.

Tourism4.0 will provide support, coaching, mentoring, and guidance towards adopting solutions offered by experts and enabling organizations that will facilitate and build capacity via training, webinars and peer learning activities.

The 5 categories of innovation challenges identified are as follows:

1. Improve customer experience
2. Develop digitalization or environmental sustainability tools
3. Obtain and maintain quality of service parameters/improve automate operations
4. Improve Booking and revenue management
5. Improve communication and digital marketing with customers.

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1.1. Who do we address?

The call has addressed tourism SMEs belonging to well-defined categories of tourism service providers:

- Hotels and similar accommodations (NACE I5510),
- Holiday and other short-stay accommodation (NACE I5520);
- Camping grounds, recreational vehicle parks, and trailer parks (NACE I5530);
- Travel agency, tour operator reservation service, and related activities (NACE N79).

1.2. Who we are?

The Tourism4.0 consortium is composed of 10 leading partners from 6 European countries (IT, PT, HR, ES, PL, MT), operating in the tourism, innovation, and business services sectors.

The consortium was established by enhancing the complementarity of the different partners, who bring with them practical experiences on the best tools to support businesses and the main needs of tourism SMEs in terms of digitization and innovation.

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2. OPEN CALL FOR TOURISM SMEs

2.1 Why should your SME participate?

There are several reasons why your SME should participate in the Tourism 4.0 program:

- Increased knowledge of digital transformation within the tourism sector and facilitated access to digital transition that will allow your company to scale up its activities.
- Potential competitive advantage by getting access to new technologies, new trends, and knowledge in technological tourism offer
- Benefiting from the potential cost-saving opportunities that digital transition can help your company reach.
- Networking and collaboration with other SMEs in your sector, business accelerators, incubators, development agencies, and other tourism industry stakeholders.
- Financial support to participate in face-to-face and online capacity-building training, and matchmaking events, to receive tailored mentoring and advisory services from experts and certifying organizations.
- Visibility and promotion that your company will receive by disseminating your participation and your digital performance improvements.

2.2. What do we offer?

The Tourism4.0 program is built around digitalization improvement activities, involving mentoring, training and webinars for capacity building and knowledge transfer, as well as matchmaking events for transnational and cross-sectoral cooperation.

Your participation in our program is **free of charge** as there are no fees for any of our activities.

2.3 Activities

Activity 1 Mentoring

How does it work

Beneficiaries will select a TOURISM4.0 mentor from a pre-established pool of mentor profiles, who will provide expert knowledge in the specific area of focus of the initiative, working with each SME (or partnership of SMEs) offering tailor-made coaching, training, and skills development to elevate the team capabilities and advise projects to achieve increased success.

Beneficiaries will be guided through the 9-months duration of the program by the TOURISM4.0 mentor, having one-to-one sessions with their assigned mentor at least twice a month.

With our proposal the benefits of participating in the mentoring plan will be:

- improved business experience;
- assistance in identifying the strengths and weaknesses of the SMEs/Start-ups;
- assistance in making informed decisions about issues that the team has doubts about;
- opportunity to discuss strategic issues & receive advice from an experienced specialist;
- increase of contacts;
- new ideas, and knowledge;
- moral support and encouragement;
- cooperation with the coach will continue after the end of the program.

Activity 2: Online Webinars and Workshops

Beneficiaries will be invited to participate in 15 webinars (max. 50 minutes each) and 6 online workshops on the following pillar-topics:

Pillar #1: Technology and solutions towards productivity and efficiency
Pillar #2: Digital sustainability and low carbon solutions
Pillar #3: Resilience: safety and compliance-guidance solutions.

To receive funding, mandatory participation in at least 5 of the above webinars / workshops is required.

Activity 3: Pills of Knowledge

Beneficiaries will be invited to participate in online learning sessions (max. 20 minutes) always available online on the TOURISM4.0 YouTube channel / video podcast on the following subjects:

1. Challenges and opportunities of the tourism industry's digital transformation (Data Analytics; Cloud Computing; Artificial Intelligence; Internet Of Things; 5 G use cases; Blockchain; WEB 3.0; AR / VR; Cyber Security; Contactless)
2. Presentation of good practices for boosting the innovation capacity of tourism entrepreneurs, especially SMEs

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3. Use of digital technologies for SMEs operating in the tourism industry
4. Integration of the tourism SMEs in the global digital value chain
5. Digitalization as the driver of growth for tourism businesses
6. Digital solutions to find new business opportunities in the tourism sector.

The pills will be accompanied by infographics relating to:

- Improve customer experience
- Develop digitalization sustainability tools
- Obtain and maintain quality of service parameters/improve automate operations
- Improve booking and revenue management
- Improve communication and digital marketing with customers.

In order to achieve funding, beneficiaries must follow at least 3 Pills of Knowledge.

At the end of each "pill" there will be a multiple-choice questionnaire designed to certify assimilation of the content.

Activity 4: Networking, peer-learning activities and best solutions exhibition

Beneficiaries will be invited to join the Tourism4.0 Final Conference, which will be held in Portugal in late 2023. It is foreseen that the Final Conference will host a networking event between beneficiaries, peer-learning activities and an exhibition of the best solutions/cases. This event will increase the visibility and positioning of the participating SMEs. Any travel costs for participation in the event can be covered by the financial support granted.

Activity 5: Financial support for investments in digitalization and innovation

Beneficiaries can also plan and receive a financial contribution for activities (e.g., training, consultancy or other services) related to one or more of the following topics:

- Improve customer experience
- Develop digitalization / environmental sustainability tools
- Obtain and maintain quality of service parameters
- Improve automate operations
- Improve booking and revenue management
- Improve communication and digital marketing with customers.

While being able to draw from the database of innovative technology solutions providers for the tourism sector published on the website www.tourism4-0.eu, beneficiary SMEs will be free to search for and choose the problem solvers they consider best suited to their needs.

How will costs be covered?

Your SME will receive an advance payment of 50% of the value of the total voucher, while the remaining part (up to the other 50%) will be refunded after the verification of the results of program implementation.

To this end, you will be asked to fill in a simple template that will be provided, describing the impact of the digitization or innovation process that you have decided to carry out in your organization and explaining how the voucher was used (max 500 words).

Each beneficiary SME will receive financial support in terms of a Voucher valued at a maximum of **7,000 euros.**

The voucher represents the maximum amount and therefore the financial support your SME might receive could be less if incurred costs at the end of the program are below these caps.
Financial support must be justified with supporting documents such as receipts and invoices.
If the purchased good or service exceeds 7,000 euros, we will only refund 7,000 euros (for example, if a company purchases software for 15,000 euros, it will only get a reimbursement for 7,000).

Eligible Costs

1) Travel, registration and accommodation costs allow active participation of tourism SMEs in the training and support activities designed and established within the TOURISM4.0 program particular thematic workshops, one-to-one and peer group mentoring and coaching sessions, pitching and networking sessions, technology partnership matchmaking, and the final conference.

2) Digital innovation and smart tourism investments, comprising technology uptake facilitation and co-development with digital start-ups/SMEs related to smart tourism, innovation/digital advisory, and digital transformation advisory.

This may include:

- requirements and innovation/digitalization need analysis;
- business process and operationalization analysis;
- technical, business, and financial feasibility assessment;
- standardization, compliance, and legal analysis;
- digital skills improvement and upgrade assessment;
- product adaptation;
- technology adoption and technology/knowledge transfer;
- product trial awareness;
- small proof of concept, prototyping, testing, and piloting activities carried out within the project.

How long does the training program last?

9 months.

2.4 Who can apply?

To be eligible for the Tourism4.0 program your company must comply with all of the following requirements:

a. Be a small or medium enterprise (SME), as defined by the EU recommendation 2003/3611:

Company category	*Staff head counter*	*Turnover*	*Or*	*Balance sheet total*
Medium-sized	< 250	≤ € 50 m		≤ € 43 m
Small	< 50	≤ € 10 m		≤ € 10 m
Micro	< 10	≤ € 10 m		≤ € 2 m

b. Be a tourism SME from one of the following categories of the tourism industry:

- Hotels and similar accommodation (NACE 55.1);
- Holiday and other short-stay accommodation (NACE 55.2);
- Camping grounds, recreational vehicle parks, and trailer parks (NACE I5530);
- Travel agencies, tour operator reservation services, and related activities (NACE 79).

c. Be located in Italy, Portugal, Spain, Malta, or Croatia.

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2.5 How to apply?

Before getting started, please note that we will only accept applications submitted in English.
Then, follow these steps to successfully submit your application:

1. Click on the "**Apply now**" button available on https: **www.tourism4-0.eu**
2. Fill out all sections of the application form. If you wish to consult it beforehand, a template of the form's structure is available in Annex I.
3. Accept the privacy policy and declaration of honour at the end of the form.
4. Click on "**Submit**".

You will receive a confirmation e-mail with a copy of your answers (check the spam folder too). If you do not, please contact us to info@tourism4-0.eu.

The deadline for application is on 18 January 2023 at 17:00 CET.

2.6 What is expected from participating SMEs?

During our program, we would require only a few things from your SME:

a) Your active participation in the program's activities.
b) Report that will allow us to monitor your digitalization performance and results. We will provide you with a simple template to be filled out.
c) Allow us to access and use your path/experience, and publicly disseminate the results.
d) Provide us with basic information about your company such as logo, description, and contact information to publicly disseminate on our website and thus facilitate potential matchmaking between your company, other tourism service providers,
e) Keep and send invoices and payment statements of the costs you incur in during our program.
f) Your commitment to improving your SME's digital performance
g) Give visibility to the Tourism4.0 project and of EU funding while participating in the program. We will provide you with a standard sticker showcasing the project's logo and EU emblem and disclaimer to be visibly placed in your establishment (window, counter, etc.). Indications for dissemination on social media will also be provided (hashtags, keywords, etc.).

3. EVALUATION PROCESS

3.1. Evaluation Committee

The Evaluation Committee is composed of 1 evaluator from each of the following six countries: Italy, Portugal, Spain, Malta, Croatia, Poland.

Therefore, the committee will be formed by 6 evaluators, coordinated by Mr. Joan Puatè, Manager at Cluster Digital de Catalunya.

3.2 Evaluation process

The evaluation process of applications, which will take approximately 4 weeks after the call deadline is closed, is summarized in the following steps:

1. Administrative revision of applications and request of documentation, if needed.
2. Evaluation Committee's coordinator distributes applications proportionally among all 6 evaluators. SME general information (i.e., company name, country, etc.) will be hidden from evaluators to ensure a fair, independent process.
3. Each of the 6 evaluators will assess the applications assigned to him or her and will fill an evaluation form prepared for the purpose.
4. Evaluation Committee's Coordinator will collect all evaluation forms and generate a ranked list from the highest scored application to the lowest, according to country.
5. Evaluation Committee meets to validate the results and agree on the final list of selected SMEs and a reserve list.

To achieve our project objectives in relation to geographical distribution, we will select:

- 13 SMEs in Italy

- 15 in Portugal

- 11 in Spain

- 11 in Malta

- 10 in Croatia.

3.3 Selection criteria

The evaluation will be carried out based on the following criteria, which will be applied to the data you provide us in the application form (see Annex I):

1. Previous experiences and initiatives about innovation (the greater and more diversified initiatives an SME has been already engaged in, the higher score will achieve);
2. Current commitment to developing digitization and innovation within your SME (e.g., current involvement in technology development activities);
3. Relevance of the potential improvements triggered with the achievement of Tourism4.0 financial support.

For the **first criterion**, a score from 5 to 0 will be assigned, according to the following scale:

- **Score 5**: relevant and diversified initiatives have been adopted and the SME has already obtained a certification
- **Score 3**: relevant and diversified initiatives have been adopted
- **Score 1**: a minimum of initiatives has been adopted
- **Score 0**: no activities declared.

Minimum threshold: 1.

For the **second criterion**, a score from 3 to 0 will be assigned, according to the following scale:

- **Score 3:** high commitment
- **Score 2:** medium commitment
- **Score 1:** low commitment
- **Score 0:** no commitment.

Minimum threshold: 1.

Finally, for the **third criterion,** a score from 7 to 0 will be assigned, according to the following scale:

- **Score 7**: very high potential
- **Score 5**: high potential
- **Score 3**: medium potential
- **Score 1**: low potential
- **Score 0:** no potential.

Minimum threshold: 1.

Clarifications about the third assessment criterion (Relevance)

The assessment will focus on the actions that SMEs plan to implement, and the resources planned to support these actions.

Data collected in the application form will allow us to assess the ambition you have for your organization in terms of digitalization and innovation, the means you plan to engage to reach your goals, and the objectives you set in terms of the digitalization and innovation process to be implemented in the framework of Tourism4.0.

After applying the mentioned 3 criteria, each SME will obtain a total score between 0 and 15.
The minimum global threshold to reach is set to score 3 (i.e., current picture + commitment + relevance have to reach at least the overall score of ≥ 3).
However, notice that there is also a minimum specific threshold set for Digitalization relevance of score 1.
Applications under these thresholds will be rejected.

Case examples:

- Case 1: if your global score reaches 2 and your relevance score is equal to 0, your application will be rejected.
- Case 2: if your global score reaches 2 and your relevance score is equal to 1 (or 2), your application will be rejected.
- Case 3: if your global score reaches 3 (or higher) and your relevance score is equal to 0, your application will be rejected.
- Case 4: if your global score reaches 3 (or higher) and your relevance score is equal to 1 (or higher), your application will be selected to enter the ranking list.

3.4 Notification of selected SMEs and feedback on the evaluation

Once the evaluation process is completed, all applicants will receive a notification by e-mail about the results, which will lead to one of these scenarios:

1) NO SELECTION
The notification will be sent together with an unsigned copy of the evaluation report.

2) NO SELECTION (IN RESERVE LIST)
The notification that your SME has not been selected but is on the reserve list will be sent together with an unsigned copy of the evaluation report.

3) SELECTION
The notification will be sent to selected beneficiary SMEs together with a contractual agreement and indications of the next steps. This agreement should be signed within 3 weeks after receiving the notification, otherwise the applicant's interest in participating in the program will be considered withdrawn and its spot will be offered to the next ranked SME on the reserve list.

3.5 How to contact us

For more information on this call and the Tourism4.0 project, please contact us via e-mail to **info@tourism4-0.eu**.

To stay tuned for our activities and more opportunities, we would also like to invite you to visit our website (www.tourism4-0.eu), subscribe to our newsletter, and follow us on our social media.

Privacy policy

Tourism4.0 is responsible for the processing of the personal data provided with your consent when completing the application form. You are informed that these data will be processed in accordance with the General Data Protection Regulation (EU) 2016/679 of 27 April 2016 (GDPR), which includes the corrigendum of 23 May 2018, and other applicable rules, for the management of the Tourism4.0 project activities and to send other content-related electronic communications, under the protection given by your consent when applying. Personal and sensitive company data provided will only be used in the framework of the evaluation process of the present call. We will store such data until these are no longer necessary for us to process in this framework, and they will not be rented, sold neither transferred to third parties.
Your personal data will be also processed in accordance with Regulation (EU) No 2018/1725 on the protection of natural persons with regard to the processing of personal data by the European Union institutions, bodies, offices and agencies and on the free movement of such data.

Annex I. Application form template

Note: this annex contains only the structure of the application form but not the form itself, which is to be filled out electronically in the dedicated area of the TOURISM4.0 website by following the indications detailed in the paragraph 2.5.

SECTION 1. General Information

Name of your organization		
VAT identification number of your organization		
Website of your organization		
Location of your organization	Italy Croatia Malta Portugal Spain	*Single choice list*
Address		
Post code		
City		
Contact person Gender	Ms. Mr.	*Single choice list*
Contact person First Name		
Contact person Family Name		
Contact person Email address		
Contact person Telephone number		
Contact person Position	Owner Manager Other	*Single choice list*

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SECTION 2. SME's eligibility and economic data

Type of Activity	Hotels and similar accommodation (NACE 55.10) Holiday and other short-stay accommodation (NACE 55.20) Travel agency and tour operator activities (NACE 79.1) Other reservation services and related activities (NACE 79.9)	*Single choice list*
Number of employees in your organization	<10 from 10 to 49 from 50 to 249	*Single choice list*
Annual turnover of your organization in 2019 (before the COVID-19 pandemic)	<2 M€ from 2 to 10 M€ from 10 to 50 M€	*Single choice list*

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SECTION 3. Previous experiences and Current commitment

a. Have you already implemented innovation or digitalization practices in your SME?

Data Analytics	Yes No	*Single choice list*
Cloud Computing	Yes No	*Single choice list*
Artificial Intelligence	Yes No	*Single choice list*
Internet Of Things	Yes No	*Single choice list*
5 G use cases	Yes No	*Single choice list*
Blockchain technology	Yes No	*Single choice list*
WEB 3.0	Yes No	*Single choice list*
AR / VR	Yes No	*Single choice list*
Cyber Security	Yes No	*Single choice list*
Contactless	Yes No	*Single choice list*

b. Please briefly explain the results and benefits obtained from the innovation or digitization activities already implemented

(max 500 words)

c. Are you currently engaged in implementing one or more innovation or digitization activities for your SME? If yes, please describe them briefly, along with the expected benefits

(max 500 words)

SECTION 4. Relevance

Ambitions	
Could you describe briefly how you envisage the digitalization process in your organization? What is your vision?	*(max 200 words)*
Could you describe the means you will plan to engage or deepen digitalization policy in your organization (human resources, equipment, financial grant)?	*(max 400 words)*

Activities of interest		
Participation in MENTORING activities		
Improved business experience	Yes No	*Single choice list*
Assistance in identifying the strengths and weaknesses of the SME's/Startups	Yes No	*Single choice list*
Assistance in making informed decisions about issues that the team has doubts about	Yes No	*Single choice list*
Opportunity to discuss strategic issues &receive advice from an experienced specialist	Yes No	*Single choice list*
New ideas, and knowledge	Yes No	*Single choice list*
Moral support and encouragement	Yes No	*Single choice list*
Cooperation with the coach will continue after the end of the program	Yes No	*Single choice list*

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Activities of interest		
Participation in WEBINARS		
Pillar #1: Technology and solutions toward productivity and efficiency	Yes No	*Single choice list*
Pillar #2: Digital sustainability and low carbon solutions	Yes No	*Single choice list*
Pillar #3: Resilience: Safety and compliance-guidance solutions	Yes No	*Single choice list*

Activities of interest		
Attending the PILLS OF KNOWLEDGE		
Field Name		
Challenges and opportunities of the tourism industry's digital transformation	Yes No	*Single choice list*
Presentation of good practices for boosting the innovation capacity of tourism entrepreneurs, especially SMEs	Yes No	*Single choice list*
Use of digital technologies in the tourism industry	Yes No	*Single choice list*
Integration of the tourism SMEs in the global digital value chain	Yes No	*Single choice list*
Digitalization as the driver of growth for tourism businesses	Yes No	*Single choice list*
Digital solutions to find new business opportunities in the tourism sector	Yes No	*Single choice list*

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Objectives		
Participation in NETWORKING activities		
Participation in the final event of the Tourism4.0 project (scheduled in Portugal in late 2023)	Yes No	*Single choice list*

Tools / Means		
Investments in DIGITALIZATION OR INNOVATION ACTIVITIES for which full or partial financing is requested		
Improve customer experience	Yes No	*Single choice list*
Develop digitalization/environmental sustainability tools	Yes No	*Single choice list*
Obtain and maintain quality of service parameters	Yes No	*Single choice list*
Improve automate operations	Yes No	*Single choice list*
Improve Booking and revenue management	Yes No	*Single choice list*
Improve communication and digital marketing with customers	Yes No	*Single choice list*

For those who intend to apply for financial contribution, please briefly describe the results and benefits expected from the planned investment, also explaining how the voucher will be used for this purpose.

(max 500 words)

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