

# Terms of Reference for an External Evaluator for the PHOENIX 4.0 Call under the Alliance Initiatives Programme

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## 1. BACKGROUND INFORMATION - PHOENIX 4.0 PROJECT

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Arctur d.o.o., based in Slovenia, is the coordinator of the PHOENIX 4.0 project, co-funded by the European Commission (EC) under the Single Market Programme (SMP COSME). The project's main objective is to support the creation of a resilient, innovative, and sustainable ecosystem that enables tourism businesses to adapt to current challenges, translating the objectives of the Transition Pathway for Tourism into practical solutions for tourism SMEs. The project's mission is to foster sustainable and regenerative transformation in the European tourism sector, promoting digital preparedness, long-term resilience, and environmental responsibility.

PHOENIX 4.0 is led by a consortium of partners from across Europe:

1. **ARCTUR - Slovenia - Coordinator**
2. AnySolution S.L. - Spain
3. Catalan Tourist Board (CTB) - Catalonia (Spain)
4. Centre of Business Excellence (CBE) - Slovenia
5. Dubrovnik Development Agency (DURA) - Dubrovnik (Croatia)
6. The Iceland Tourism Cluster (ITC) - Iceland
7. Open Tourisme Lab (OTL) - France
8. Prishtina REA - Kosovo

The project started on 1 November 2024, and has a duration of 34 months.

The core activity under the PHOENIX 4.0 project relates to the implementation of the so-called **Alliance Initiatives Programme**, a funding scheme for tourism SMEs from the partner countries. To this end, the project will launch a "**Call for Competition for the selection of SMEs to be awarded financial support under the Alliance Initiatives of the PHOENIX 4.0 Project**" with the aim to select innovative collaborative projects for funding.

The Call for Competition is launched on a transnational level in the following territories: Croatia (limited to the area of Dubrovnik), France, Iceland, Kosovo, Slovenia, and Spain (where the call is implemented separately by two partners: one responsible for Catalonia and another responsible for the remainder of the Spanish territory).

The project will dedicate an overall amount exceeding €1,065,000 to fund at least 45 collaborative projects. Selected projects will receive a lump sum grant of **€25,000**, except for those in Kosovo, which will receive **€15,000**.

- Catalonia (Spain): 6 projects will be supported by the Catalan Tourist Board (CTB), with a maximum allocated budget of €150,000.
- Dubrovnik (Croatia): 6 projects will be supported by the Dubrovnik Development Agency (DURA), with an allocated budget of €150,000.
- France: 6 projects will be supported by Open Tourisme Lab (OTL), with a maximum allocated budget of €150,000.
- Iceland: 5 projects will be supported by the Iceland Tourism Cluster (ITC), with an allocated budget of €125,000.
- Kosovo: 6 projects will be supported by Prishtina REA (REA), with an allocated budget of €90,000.
- **Slovenia: 11 projects will be supported — 6 managed by ARCTUR and 5 by the Centre of Business Excellence (CBE) — with a total allocated budget of €275,000 (€150,000 for ARCTUR and €125,000 for CBE).**
- Spain (excluding Catalonia): 5 projects will be supported by Anysolution (ANYSOL), with an allocated budget of €125,000.

### Additional Information about the Call for Competition (PHOENIX 4.0)

- **Objective:** The programme supports innovative collaborative projects that introduce innovative and leading practices in sustainability, digitalization, and resilience. The initiative aims to strengthen resilience, sustainability, and digital transformation across the six countries/regions involved: Dubrovnik (Croatia), France, Iceland, Kosovo, Slovenia, and Spain. Projects must address one or more of the thematic topics outlined in the guidelines.
- **Innovation and Sustainability:** Proposals will be evaluated based on criteria mainly including Innovation and Creativity, Resilience and Sustainability Potential, and Contribution to the Transition Pathway and SMP Objectives.
- **Additional Criteria:** Extra bonus points (5 points) are awarded for Transnational Partnerships. An extra bonus of up to 5 points is also awarded for the Project Pitch evaluation at the Tourism Transition National Demo Day.
- **Requirements for Applicants:**
  - Applicants must be a tourism Small and Medium-sized Enterprise (SME) acting as the Lead Applicant, legally established and registered in one of the partner countries/regions.
  - Applications must be submitted by a partnership consisting of a minimum of two (2) and a maximum of five (5) independent organisations.
  - At least 50% of the partners in each partnership must be tourism SMEs.
- **Grant Amount:** Each selected project will be awarded a fixed lump sum grant of **€25,000**, except for projects in Kosovo, which will receive **€15,000**. The funding scheme is a 100% lump sum, which is non-repayable, and financial reporting is based on deliverables.
- **Eligible Activities:** The types of activities and costs that can be funded include, among others, specified in the guidelines:
  - Implementation of new business ideas, new products' development, market studies.

- Development and implementation of innovations, including prototypes, software licenses, and new digital tools.
- Design and implementation of measures on corporate social responsibility and accessibility.
- Certification costs relevant to sustainability, digitalization, and resilience.
- Promotion and communication activities.
- **Eligible costs:** The grant must primarily benefit the tourism SMEs. Compulsory expenses include travel, accommodation, and subsistence costs (fixed allocation of €1,000) to participate in the PHOENIX 4.0 final conference in Ljubljana (Slovenia) in Spring 2027. A maximum of 30% of the overall grant awarded can be allocated to non-tourism SME partners.
- **Ineligible costs** include, among others:
  - Capacity-building activities provided by the consortium or by trainers trained within WP3.
  - Coaching and consulting services provided by the consortium as part of activities in WP4.
  - Services provided by the consortium or subcontractors.
  - Purchase of infrastructure.
- **Approximate Timeline:** The call opens on **January 15, 2026**, and the deadline for submission is **March 18, 2026, at 17:00 CET**. Project implementation starts approximately in **July 2026** and lasts for **9 months** (until March 2027).
- **Additional Opportunities:** The project offers access to training and resources through the PHOENIX 4.0 Academy and Lab, expert mentoring and consultancy, networking opportunities, and international visibility.
- **Evaluation:** The call is based on a competitive selection system. The highest-ranking projects per country/region will be funded until the allocated budget is exhausted. An evaluation guide will be provided to the evaluators to harmonise the evaluation procedures among countries.

More information about PHOENIX 4.0 is available on the project [website](#).

## 2. DESCRIPTION OF THE ASSIGNMENT

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### 2.1 Objective

Arctur d.o.o., the coordinator of the PHOENIX 4.0 project, is seeking an external expert to support the evaluation of proposals submitted under the **Call for Competition for the selection of SMEs to receive financial support within the Alliance Initiatives of the PHOENIX 4.0 project**.

Each proposal submitted under the call will be evaluated by two evaluators, as well as by a single European panel composed of all evaluators appointed by the Project Partners. Consequently, the objective of this call is to contract one external evaluator to assess the proposals managed by Arctur.

## 2.2 Scope of the assignment

The selected evaluator under this assignment shall evaluate all proposals managed by Arctur d.o.o., in its role as coordinator of the PHOENIX 4.0 project. Please note that the final number of proposals will only be known after the closure of the call.

Please note that each proposal will be evaluated by at least two evaluators.

The evaluators will form part of an evaluation panel that will meet twice online:

1. Before the start of the evaluation, receive a common briefing on the Award Criteria, scoring rules and evaluation procedures. Estimated on 19-20 of March 2026.
2. After the national evaluations are completed, jointly review and confirm the ranked lists submitted by each evaluator. Estimated on 24 April 2026.

The evaluator will receive specific evaluation guidelines and an evaluation matrix to follow. Notwithstanding, for information, the award criteria are:

Criterion	Description
<b>Feasibility</b>	Evaluates whether the proposed action is technically, operationally, and economically feasible. Considers the soundness of the approach, resources available, risk management, and readiness for implementation.
<b>Innovation and Creativity</b>	Assesses the novelty and originality of the proposed solution or approach in addressing tourism resilience challenges. Looks at new methods, tools, or ideas that add value to the sector or improve competitiveness.
<b>Replicability and Transferability</b>	Considers whether the concept or model can be replicated or adapted in other regions, destinations, or market contexts, multiplying the impact.
<b>Collaboration and Partnership Potential</b>	Evaluates the participants' capacity, competence, and commitment to effective collaboration. Considers complementarity, governance, and stakeholder engagement.
<b>Efficiency and Cost-Effectiveness</b>	Examines the relationship between expected results and the use of resources. Ensures good value for money and optimal use of budget, time, and staff.
<b>Resilience and Sustainability Potential</b>	Evaluates the project's potential to strengthen tourism resilience — economic, social, and

	environmental — and its contribution to long-term sustainability, adaptability, and digital or green transitions.
<b>Contribution to the Transition Pathway and SMP Objectives</b>	Assesses alignment with the Tourism Transition Pathway and Single Market Programme goals, including competitiveness, innovation, and resilience of SMEs.

Moreover, Transnational partnerships will get extra points.

A national or regional **pitch evaluation** is expected to take place during the online National Demo Days, planned for the week of 23–26 March 2026. For Arctur d.o.o., the pitch evaluation is tentatively scheduled for **25 March 2026**, subject to confirmation. Applicants will deliver a clear and persuasive presentation that demonstrates the project’s relevance, collaborative nature, and potential impact, while evaluators will assess their presentation and provide extra points.

The evaluation process must be carried out according to pre-established criteria and must use official templates for the documentation of results. The evaluator must adhere rigorously to the instructions, procedures, and established timelines.

For each proposal evaluated, the evaluator must submit a short evaluation report (qualitative feedback—bullet point comments on each criterion—plus a quantitative score) in English language. While applicants are encouraged to submit the application in English, applications in any other programme language are accepted, provided an abstract in English is supplied.

It is expected that the evaluator carries out the work remotely.

Evaluators will have to sign **confidentiality and absence of conflict-of-interest declaration**.

## 2.3 Expected results

The evaluator is expected to deliver the following results:

- Evaluation report in English language and scoring of all proposals in each evaluation criterion using the official Excel template.
- Justification of evaluation results (if requested).

## 3. TECHNICAL REQUIREMENTS

Experts must comply with the following criteria in order to be selected as evaluators:

- At least 5 years of knowledge of and/or experience working in the tourism sector and EU-funded projects (to be demonstrated in the CV).
- Knowledge of innovation in the business areas highlighted in the Call for Competition: **resilience, sustainability, and digital innovation**.
- Knowledge of the national context (Slovenia), particularly regarding the tourism industry, the challenges businesses are facing, and their level of innovation.
- Proficiency in Slovenian and English (minimum B2 level for each language).

The completed application form (see last page of this call) together with the CV must be submitted to [info@tourism4-0.org](mailto:info@tourism4-0.org) by **6 March 2026**.

## 4. CONFIDENTIALITY AND ABSENCE OF CONFLICT OF INTEREST

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### **Conflict of Interest:**

The subcontracted evaluator must not have a direct or indirect conflict of interest with any of the proposals that he/she evaluates. An evaluator is deemed to have a direct conflict of interest when any of the following applies: he/she is employed by the applicant institution; works closely in collaboration with the applicant (professional relationship); was involved in the preparation of the proposal; or is in some other way closely related to the applicant (family relationship). An evaluator is deemed to have an indirect conflict of interest if any of the following applies: the evaluator would directly benefit from the proposal being funded or not funded in the context of his/her own professional activities. In such cases, the evaluator may not evaluate the proposal and may not take part in discussions related to the proposal. Evaluators must declare that no conflict of interest exists and that he/she will inform the consortium if any such conflict should arise in the course of his/her duties. If during the evaluation itself, it is discovered that an evaluator is in some way connected with a proposal or has some other involvement, which impairs his/her impartiality, he/she must inform the contractor immediately.

### **Confidentiality:**

Evaluators are responsible for maintaining confidentiality at all times during the process. The selected evaluator will have to sign a Conflict of Interest and Confidentiality declaration before receiving proposals for evaluation. When carrying out evaluations remotely, evaluators are expected to keep proposal information confidential and not release proposal or evaluation information to third parties. Under no circumstance may evaluators attempt to contact an applicant either during the evaluation or afterwards.

## 5. TIMELINE

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The technical evaluation process will start after the closure of the Call for Competition on **18th March 2026**. The evaluation phase is expected to last approximately **1 month**

(March/April 2026). A rigorous adherence to the established timeline is expected for the evaluator.

The subcontracting service is considered as finalized once the Selection Committee has approved the evaluation results.

**Overall calendar overview (estimated):**

Stages	Dates
Opening of the Call	15 January 2026
Call closure (Deadline)	18 March 2026 at 17:00 CET
Evaluator Info Session	Estimated on 19–20 March 2026
Technical evaluation of proposals (including Pitch Evaluation)	1 month (March/April 2026)
Submission of Final Evaluation Results to the European Panel – Consensus Between Internal and External Evaluators	Estimated on 20-23 April 2026
Evaluators 2nd meeting	Estimated on 24 April 2026
Final approval of evaluating results	May 2026
Start of approved projects	Estimated 1 June/1 July 2026

## 6. PAYMENT CONDITIONS

The remuneration for this subcontracting service is established as a global fixed price, regardless of the final number of proposals to be evaluated. The ultimate number of proposals is currently undefined and will only be known once the Call for Competition is closed.

The payment procedure is structured as follows:

- The provider will issue the corresponding invoice at the end of the service provision. The invoice must be addressed to the PHOENIX 4.0 partner organisation of the country/region that has subcontracted the service.
- The invoice must be identified with the specific purchase order number that the contracting partner will provide; otherwise, it will be returned for identification.
- The contracting partner will pay the invoice within a maximum of 60 days after the finalized evaluations and receipt of the valid invoice.

## PHOENIX 4.0 Evaluator's Offer Form

The most economically advantageous offer will be selected based on the following weighted criteria, prioritizing specific technical experience and cost-competitiveness:

Criterion	Maximum Score	Evaluation Focus
1. Advanced Experience and Technical Skills	70 points	Evaluation of professional qualifications and relevant technical experience
2. Local Contextual Knowledge and Linguistic Knowledge	20 points	Evaluation of understanding of the local tourism market and communication capacity.
3. Price and Economic Advantage	10 points	Evaluation of the competitiveness of the proposed daily or per-evaluation rate.

## APPLICATION TABLE

<b>Name &amp; Surname</b>	
Address	
City, ZIP code	
Country of residence	
Contact E-Mail	
Contact Phone Number	
<b>Price (VAT excluded)</b>	EUR
<b>Curriculum Vitae</b>	ATTACHED
<b>Legal Bases and Processing of Personal Data</b>	By submitting my offer, I confirm I have been informed about the legal bases and the processing of personal data indicated in the "Terms of Reference for the Subcontracting of an Expert for the Evaluation of Proposals for the PHOENIX 4.0 Alliance Initiatives Programme".

The completed application form together with the CV must be submitted to [info@tourism4-0.org](mailto:info@tourism4-0.org) by 6 March 2026 at 17:00 CET.