



Tourism of Tomorrow Data-Driven Destinations Hub

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D5.2 Competence Centre's Business Plan

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List of Acronyms

Abbreviation / acronym	Description
AI	Artificial Intelligence
CC	Competence Centre
DMO	Destination Management Organisation
EC	European Commission
ETC	European Travel Commission
ETDS	European Tourism Data Space
Eurostat	Statistical Office of the European Union
INE	National Statistics Institute (Spain)
JRC	Joint Research Centre
MFF	Multiannual Financial Framework
MST	Measuring the Sustainability of Tourism (UN Tourism statistical framework)
OECD	Organisation for Economic Cooperation and Development
P2P	Peer-to-Peer
SF-MST	Statistical Framework for Measuring the Sustainability of Tourism
SME	Small and Medium-Sized Enterprise
STR	Short-Term Rental
TSI	Tourism Sustainability Indicator
UVP	Unique Value Proposition
VAT	Value Added Tax

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1 Introduction

1.1 Purpose of the document

This deliverable aims to provide the European Commission and EISMEA, project partners, and the wider tourism community with a comprehensive blueprint to take the D3HUB-Data Driven Destinations Hub testing phase of the European Competence Centre to support Destinations on Data Management's next step and plan its long-term operation. It also serves as a foundation for dialogue on its future legal form, governance structure, and financial framework, ensuring that the Competence Centre emerges as a trusted, collaborative entity serving European destinations.

The D3HUB project's overarching goal is to design, test, and pave the way for a self-sustainable European Competence Centre that supports tourism destinations and their ecosystems — particularly SMEs — in their data-driven green and digital transition, while fostering collaboration and knowledge transfer across the European tourism sector. These are assumptions that the D3HUB project is testing by putting them into practice.

This document outlines:

- The methodological approach adopted, centred on the Business Model Canvas, to co-create and validate the business model with stakeholders.
- The rationale behind the selected value proposition, service portfolio, and customer segments reflects the real needs identified through surveys, workshops, interviews, and the pilot programme.
- Scenarios for governance, resources, and revenue models to be further explored during the D3HUB final project cycle, to ensure sustainability and continuity after the project funding period.

The confirmed and final elements of the European Competence Centre to support Destinations in Data Management will be gathered into the deliverable "5.3 Sustainability Plan".

1.2 From the D3HUB project to the European Competence Centre

Since May 2025, D3HUB submitted a deliverable to define the European Competence Centre to support Destinations in Data Management, and afterwards, the Support Scheme was also defined, activating the activities as CC:

- The Service Portfolio's key element, which is delivering capacity building, is being offered during an initial pilot period from February 2025 to February 2026, and it will continue beyond this date
- A group of 40 Destination Marketing Organisations from all over Europe, who are currently the D3HUB pilots and potentially the first clients, or at least users of the Competence Centre.
- The leading organisations specialised in the European tourism public-private sector have been engaged across key project milestones, contributing to defining the service portfolio, providing feedback on the current blueprint, sharing their interest and views in reinforcing this collaboration, and supporting the Competence Centre in pursuing its journey.
- Eurostat, the JRC, and a range of National-Regional Official Statistic Bodies have validated the D3HUB indicators framework, which the DMOs are testing by collecting data, and which are defined to gather the necessary data for DMOs to measure and take decisions leading to monitor and solve territorial challenges.

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Designing the European Competence Centre's business plan is an ongoing process, for which the D3HUB partnership applies the **following principles**:

- The European Competence Centre won't replace or overlap with other existing (EU) initiatives. It will run collaboratively in parallel, helping them maximise their projects' output and transfer the results to the EU Tourism Sector.
- This requires ongoing engagement and co-creation with key leading organisations representing both European destinations at different geographical levels and the interests of tourism and travel companies and tech companies, to ensure broad representation and alignment across the European tourism ecosystem and to enable a comprehensive, data-informed, and policy-aligned approach to coordination.
- Reaching consensus on why and how the Competence Centre solves a market failure: The European Competence Centre has the opportunity to deliver services that bring tourism data-related initiatives closer to the sector in a practical way.
- Ensuring that the Competence Centre plays as an intermediary role, operates as a non-profit entity, and provides a trusted space for public and private entities, statistical and research organisations to collaborate.
- A transition period between the D3HUB project end (by October 2026) and the official creation of the Competence Centre entity absorbing its initial capital to run its operations is the most probable scenario.
- Connection to the European Tourism Transition Pathways, the new Commission's ambitions, and the future European Tourism Strategy and broader European Agenda.

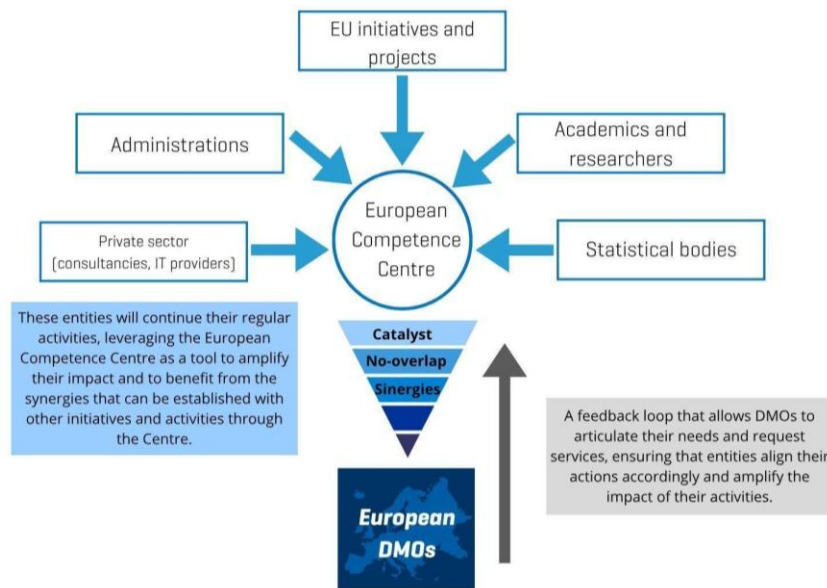
Therefore, the **Competence Centre is being designed as a catalyst for existing initiatives and to help create and participate in new ones, aiming to enhance their impact on the European tourism sector.** Thanks to its close contact with the European Tourism Ecosystem, the Competence Centre will have the potential to act as a feedback loop, informing other European policies and initiatives about the real needs, requirements, and priorities.

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Figure 1 EU Competence Centre for Tourism approach: to be a common playground where different existing stakeholders can provide services to the European DMOs. The EU Competence Centre doesn't want to overlap or compete with existing stakeholders.



1.3 European Competence Centre position and case for existence

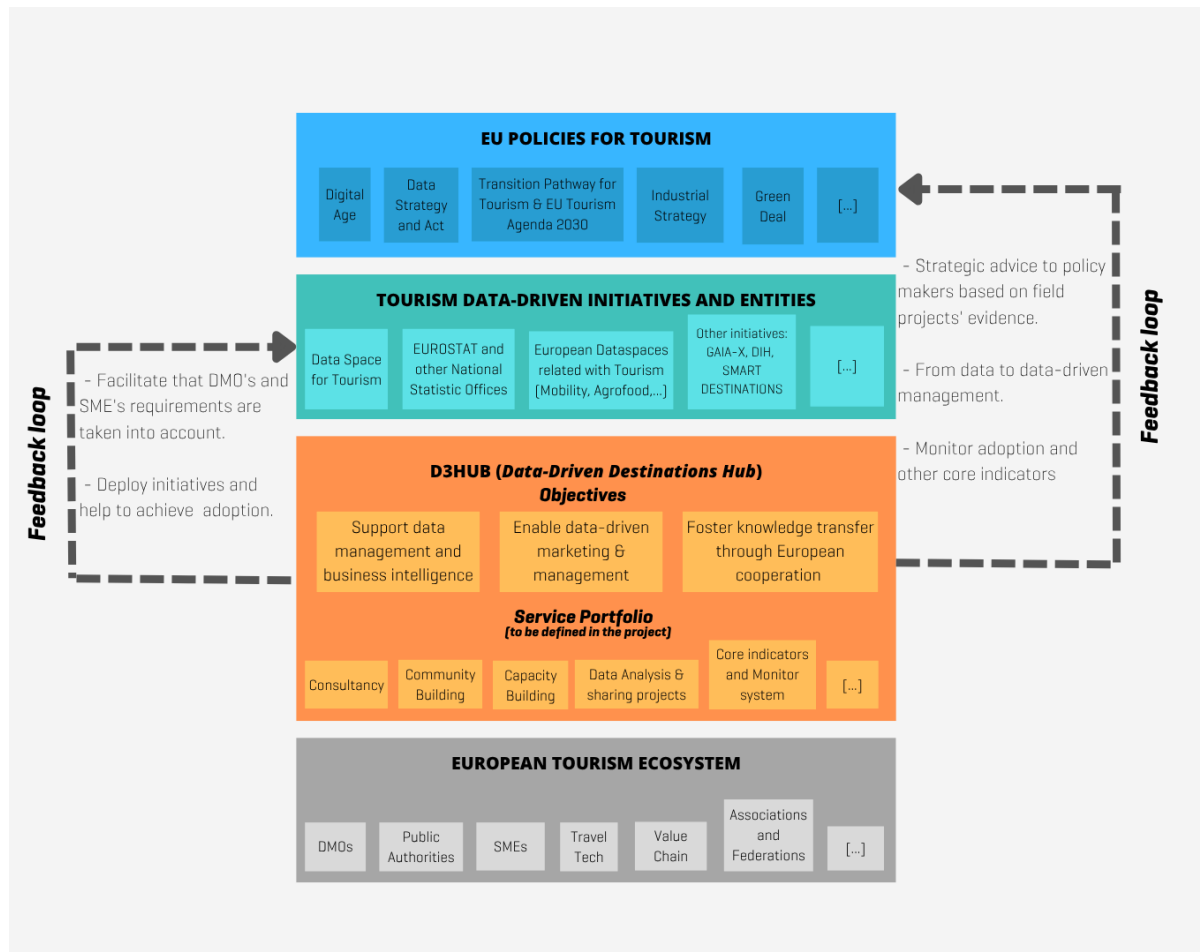
As described in the above section, the European Competence Centre to Support Destinations in Data Management is being designed to strategically position itself as a nexus for the European tourism ecosystem, the broader EU tourism policy landscape, and data-driven initiatives. As illustrated in the diagram, the CC could act as a bridge, connecting tourism stakeholders — such as DMOs, SMEs, public authorities, and industry associations — with key European data spaces, statistical bodies, policy frameworks, commercial data players, travel-tech companies, experts, consultancies, and the EU academic ecosystem. Through its service portfolio, capacity-building, data analysis, and community engagement, the CC can maintain direct, continuous engagement with tourism actors on the ground. This proximity will allow it to capture real-time needs, challenges, and **opportunities from the field and feed them upward into European-level strategies and initiatives**. In doing so, the CC ensures that the requirements of destinations and SMEs are not only heard but **actively integrated into the design and deployment of EU-wide data tools and tourism policies**, thereby establishing a vital feedback loop that streamlines information flow across different levels of governance.

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Figure 2 EU Competence Centre for Tourism position in the EU tourism and data ecosystem



As a result of the D3HUB partnership consultation and exchanges with key leading stakeholders, the Competence Centre's need for existence is justified and described below.

Indeed, European tourism stands at a critical juncture. Destinations face **unprecedented complexity**: managing unbalanced tourism in hotspots, **reversing depopulation in emerging regions**, addressing **climate adaptation and mitigation**, **balancing the needs of residents and visitors**, and responding to **global competition**. At the same time, they are expected to **align with EU-wide strategies** on sustainability, resilience, and digitalisation.

Despite this urgency, the **data maturity of European DMOs is alarmingly low**. Findings from surveys and workshops conducted in the D3HUB project indicate that most DMOs remain **severely limited in their ability to utilise data effectively**. They rely heavily on fragmented, highly aggregated official statistics and lack the resources and expertise to transform data into actionable strategies. Without targeted support, most destinations will be unable to fully participate in or benefit from various European data initiatives.

Europe already hosts several strong entities and initiatives, including Eurostat and JRC, which runs the EU Tourism Dashboard¹, and National Statistical Offices. Furthermore, the OECD's sustainability

¹ <https://tourism-dashboard.ec.europa.eu/>

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indicators and the **UN Tourism's Statistical Framework for Measuring the Sustainability of Tourism** are notable international initiatives.

However, these initiatives:

- Often, there is a lack of **sector-specific tailoring** for tourism management.
- They are not consistently **translated into operational tools** for local or regional DMOs;
- Do not provide the **capacity-building and mentoring** needed to bring smaller or less mature destinations along.

Consequently, this creates a **structural gap**: Valuable data exists but is inaccessible, underused, or misaligned with the practical realities of destinations. The Competence Centre fills this gap by acting as the **translator, integrator, and enabler** of Europe's tourism data ecosystem:

- **Translator**: converting complex statistical frameworks and EU policy requirements into practical methodologies and easy-to-use dashboards for DMOs.
- **Integrator**: bringing together data from multiple sources (official, private, real-time) and aligning them within the European tourism and data-related initiatives.
- **Enabler**: providing capacity-building, mentoring, and structured learning paths that empower destinations to become **self-sufficient in data-driven management**.

1.4 The European Competence Centre in the European Tourism Agenda

In addition to the above-presented reasons for existence, the Competence Centre has the potential to support the **European Tourism Transition Pathway** and the EU's broader objectives of sustainability, digitalisation, and resilience. It would ensure that the European tourism ecosystem can:

- 2 **Adapt to the European Green Deal** by embedding sustainability indicators into decision-making.
- 3 **Leverage the digital transition** by guiding destinations in the use of data spaces, AI, and predictive analytics.
- 4 **Strengthen resilience** by equipping destinations to anticipate crises, manage flows, and diversify tourism models.

The following table maps the thematic priorities of the EU Transition Pathway for Tourism.² To the specific contributions of the European Competence Centre, demonstrating how the Centre can act as the implementation engine that translates high-level policy objectives into actionable tools, methodologies, and services for destinations and SMEs.

² <https://op.europa.eu/en/publication-detail/-/publication/404a8144data-driven-8892-11ec-8c40-01aa75ed71a1>

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Alignment of the European Tourism Competence Centre to Support Destinations in Data Management and the European Tourism Transition Pathways

Table 1 EU Competence Centre for Tourism support for the Tourism Transition Pathway Themes and Objectives

Topics	Objectives	European Competence Centre contribution
Sustainable competitiveness	Boost innovation, sustainability, and global competitiveness of EU tourism	• Curated knowledge hub of best practices regarding data-driven policies for European DMOs. • Tailored DMO training on sustainability and digitalisation • Encourage tourism sustainability benchmarking between DMOs, aligned with the UN Tourism SF-MST and other international standards, adapting them to destinations' practical data and policy needs.
Regulation and public governance	Improve governance, harmonisation, fair STR, and digital markets	• Policy feedback loop that aligns DMOs' needs with EU frameworks • Governance innovation community for collaborative models. • Training and helping DMOs to comply with and support different regulations such as the STR, the Data Governance Act, and the Digital Services Act.
Green transition	Decarbonisation, climate adaptation, biodiversity protection	• Emissions accounting and carrying capacity analysis • Climate adaptation peer learning and mentoring

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Digital transition	Accelerate digitalisation and data sharing	• Proxy to the European tourism-data initiatives and projects, with existing methodologies and standards • Open-source dashboards for decision support (flows, sustainability, forecasting) • Tech-neutral evaluation of tools to reduce dependency on vendors
Resilience	Strengthen the ability to cope with shocks (pandemics, crises, climate)	• Forecasting and scenario planning. • Risk governance and crisis response models to be developed • Peer-learning networks to share lessons and solutions
Social dimension	Inclusiveness, skills, fair work, resident–visitor balance	• Pilots on balancing residents & visitors, measuring social carrying capacity • Workforce reskilling aligned with the EU Skills Agenda • Multilingual services ensuring inclusiveness across EU regions
Investment and funding	Mobilise EU, national, and private funds for twin transition	• Funding intelligence hub to advise destinations/SMEs in EU programmes to be offered as a service

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Monitoring and co-implementation	Track progress collaboratively, ensure accountability	• Common KPIs and indicators aligned with Eurostat/UN Tourism (SF-MST) • Common dashboard for DMOs across Europe so that they can benchmark. • Evaluation from 40 pilot destinations to scale what works
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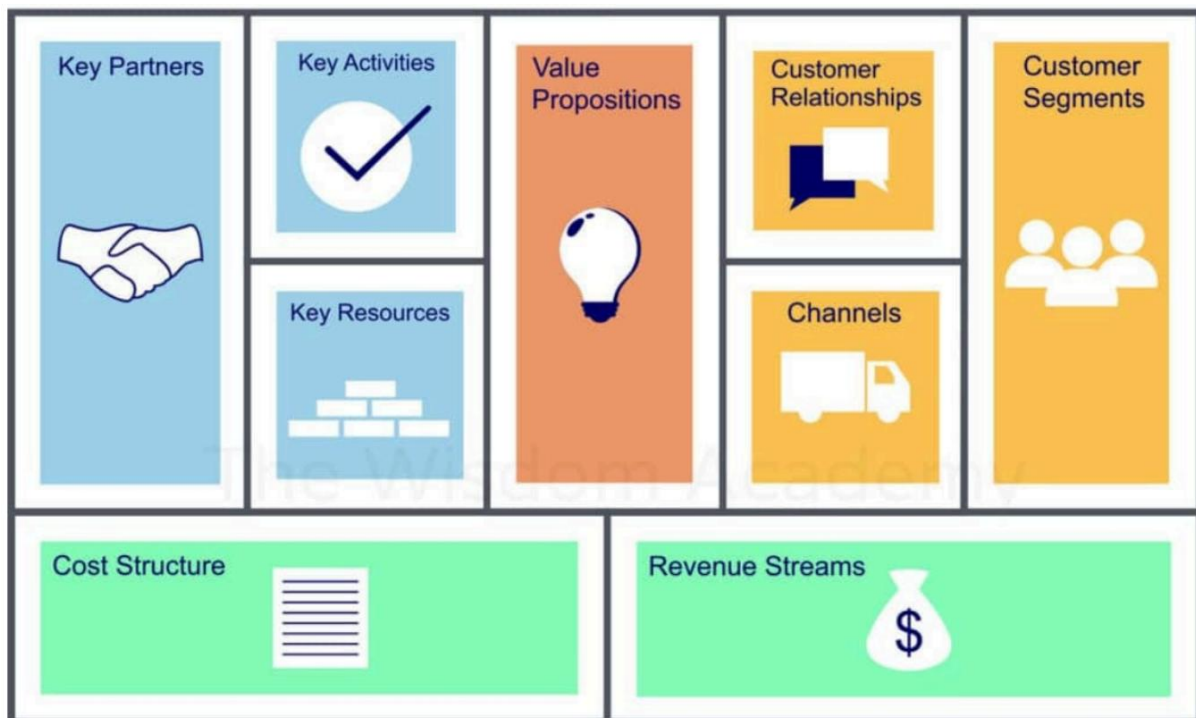
2 Baseline analysis and methodology

2.1 CANVAS Business Model

The European Tourism Competence Centre's Business Plan is being developed through a co-creation process that reflects the Centre's philosophy, based on the adoption of the **Business Model Canvas** as our methodology, tool, and reference framework. Its structured yet highly visual format provided a practical foundation for collaborative work, enabling diverse stakeholders to contribute their expertise in a clear and accessible way. The Canvas served not only as a methodological guide but also as a shared language, boosting participation during workshops, webinars, and partner meetings, and ensuring that all elements of the Competence Centre's business model were addressed in an integrated manner.

The Business Model Canvas organises these elements into nine interconnected building blocks, including value proposition, customer segments, customer relationships, channels, key activities, key resources, partnerships, cost structure, and revenue streams — providing a clear and concise framework for discussion.

Figure 3 Business Model Canvas visual representation showing the key business model areas.



Multiple sources of evidence and input were brought together to populate and refine the Canvas:

1. D3HUB project's previous deliverables and ongoing activities.
2. Interviews with leading European tourism organisations.
3. D3HUB Advisory Board Consultation.
4. Ongoing dialogue with the European Commission and relevant EU Institutions, so far, the EU Parliament and the Committee of the Regions.

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2.2 D3HUB Previous deliverables and ongoing activities

2.2.1 Organisational and Functional Structure of the EU Competence Centre

The **D5.1 Detailed Organisational and Functional Structure of the EU Competence Centre**³ Deliverable, developed in task **T5.1 Conceptualisation and formalisation**, sets out a detailed description of how the European Tourism Competence Centre could be organised and function, both during the D3HUB project implementation and in its long-term operation. The first part of the document outlines the proposed implementation structure for the Centre within the funded period. In contrast, the second part presents an initial analysis of potential legal forms, governance models, procedures, and resources available under European and national legislation. Several legal and organisational options are identified and described in depth; however, no single form is selected at this stage, as the decision will depend on further consultation and policy considerations.

This deliverable is highly relevant to the Business Plan because the final legal form of the Competence Centre will directly influence, and potentially constrain, its business model. Organisational and legal choices will determine administrative procedures, decision-making authority, financial management mechanisms, and operational flexibility—for example, the ability to subcontract external experts.

2.2.2 Support scheme

The **D2.2 Support Scheme Report is a core deliverable of the D3HUB project**, designed to detail the portfolio of services and information flows envisaged for the first pilot phase of the European Competence Centre. Building on the findings of the **D2.1 Information Needs and Qualifications Report**, it translates the identified needs of European DMOs and SMEs into a structured, multi-level capacity-building support system. The scheme is organised around three dimensions:

- **Stages of competence building, guiding** destinations from needs identification to action plan implementation
- **Training approaches**, including expert webinars, one-on-one mentoring, peer-to-peer learning, digital tools, and best practice documentation;
- **Training topics**, both cluster-specific (aligned with D3HUB's four thematic areas) and cross-cutting (sustainability indicators and data-sharing standards).

These three dimensions provide the structural backbone of the Support Scheme, ensuring that the Competence Centre's offer is coherent, comprehensive, and adaptable to the varying needs of European destinations. They translate into a set of concrete, practical services that address both the “what” and the “how” of capacity building, covering the whole journey from initial needs assessment to the implementation of data-driven destination management practices.

The CC's commitment to facilitating this transformation will manifest through a series of tailored services, including:

- **Webinars**: developed around particular topics and/or methodologies
- **P2P learning activities**: linking destinations based on shared needs and challenges
- **One-on-one mentoring and consultation**: help to understand local contexts, needs, and opportunities, and research action plans
- **Digital solutions**: development of an open-source dashboard for benchmarking
- **Documentation of best practices**: both part of P2P learning activities and as a more formal documentation and dispersion of best practices

³ https://www.d3hub-competencecentre.eu/wp-content/uploads/2024/07/D3HUB_D5.1_Detailed-Org-and-Func-Structure-EU-CC_v2.0-signed.pdf

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This support scheme is not a static blueprint; it is currently being tested in the Pilot Phase (**Task 4.3 Pilot phase**), involving 40 destinations across Europe. These pilots serve as a real-world laboratory to validate, refine, and adapt the proposed services. Each partner leading a pilot collects lessons learned from their implementation, while participating destinations and future CC customers are actively consulted for feedback. This dual input ensures the scheme is tested from both a service-delivery and user-experience perspective. In particular, Task **T4.4 Validating** aims to assess and gather insights on how the services defined in Task **T2.4 Competence Centre's Support Scheme** have been implemented during the testing phase. This will also provide feedback and allow for the fine-tuning of the support scheme, which will become the portfolio of services that the D3HUB will deploy once it is formally constituted.

The relevance of this source to the Business Plan is twofold. Firstly, it provides the foundational service offer on which the CC's value proposition and revenue model will be built. Secondly, because it is being piloted, it offers a unique opportunity to fine-tune the business model based on concrete operational feedback before launch.

2.2.3 Pilot phase

On January 15, 2025, as part of task **T4.2 Pilot selection**, the consortium selected 40 destinations to participate in the D3HUB pilot phase (task **T4.3 Testing**), which ran from February 2025 to February 2026. This pilot is designed to test and refine the services to be delivered by the future European Competence Centre for Tourism, ensuring they are practical, relevant, and aligned with the real needs of European tourism destinations.

The pilot phase has been carefully structured in task **T4.1 Pilot identification and assessment scheme**, to assess the Competence Centre's service portfolio by addressing key challenges identified through an extensive consultation process. This process, conducted via multiple channels, resulted in the selection of four thematic clusters:

- **Redistributing tourism flows in space and time**
- **Managing the balance between residents, visitors, and stakeholders**
- **Climate change mitigation and adaptation**
- **Supporting emerging destinations to attract quality and sustainable tourism**

In the initial stage, each participating destination was assigned to one thematic cluster. Personalised interviews were then conducted to capture each destination's specific requirements, priorities, and needs regarding its assigned topic. This tailored approach enabled the customisation of services and content to meet individual needs.

In response to participant feedback, an observer role was introduced for destinations that wish to follow more than one cluster. This role acknowledges that challenges are often interconnected, and it allows destinations to participate as listeners in additional clusters. By enabling cross-topic engagement, the pilot fosters a more holistic understanding of destinations' needs, enriching the overall experience and learning outcomes.

The D3HUB pilot methodology combines expert guidance, peer exchange, practical application, and cross-cluster collaboration:

- Expert insights and knowledge sharing – Presentations from the D3HUB team and external experts, real-world case studies, and the latest research, complemented by open Q&A sessions with expert panels.
- Peer learning and experience exchange – Participating destinations share challenges, initiatives, and best practices, promoting mutual learning within each cluster.
- Hands-on exercises and practical applications – Tools and frameworks are applied to real-life scenarios through collaborative problem-solving activities.

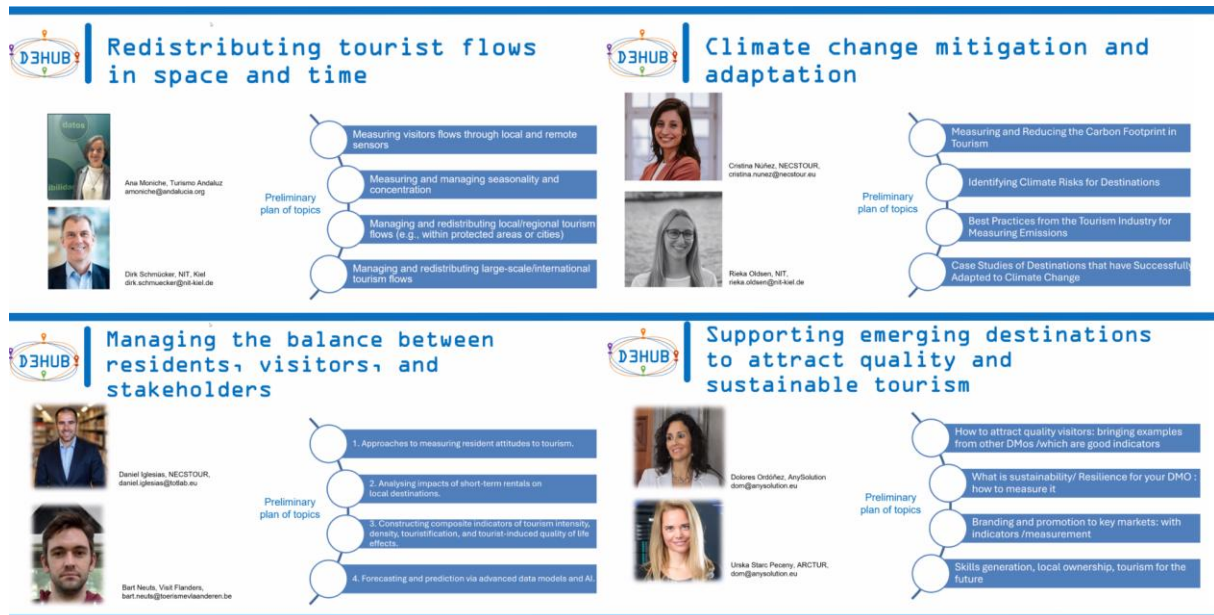
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- Cross-cluster learning – Two dedicated cross-cluster events enable knowledge exchange between thematic areas, broadening perspectives and deepening insights.

Figure 4 Four thematic clusters run in the pilot phase.



The pilot phase represents a cornerstone for the Competence Centre’s Business Plan development:

It serves as a **real-world testbed for the Support Scheme**, generating valuable operational insights into **service effectiveness, user needs, and delivery methods**. As the pilot phase is still ongoing, structured **feedback from participating destinations**, which are themselves **potential future customers of the Competence Centre**, will be gathered later in the process and subsequently **incorporated into future adaptations of both the Business Plan and the Sustainability Plan**. Furthermore, the active involvement of both partners and destination representatives in capturing lessons learned guarantees that the final business model reflects **practical realities, maximises relevance, and is tailored to the diverse needs of European tourism destinations**.

2.3 Advisory boards

Within the framework of Task **T5.3 Sustainability and Continuity**, the European Competence Centre has achieved Milestone **M8 Advisory boards**, with the formal establishment of two Advisory Boards. These bodies are far more than consultative committees; they are embedded in the European Competence Centre’s architecture as strategic assets, providing both the methodological rigour and market insight required to shape a viable and sustainable business model. Their function is contributing to the project execution to guarantee quality assurance and obtain sound feedback on key project milestones checks, promote stakeholder involvement and community building, and ensure alignment and compliance with relevant initiatives at the European level:

- **The Statistics and Research Board** brings together official European statistical bodies that are either associated partners or have formally expressed support for the D3HUB initiative, alongside internationally recognised research institutions. Eurostat, the European Commission’s Joint Research Centre, the UN Tourism Statistics Department, and the OECD are prominent examples. Their engagement ensures that the European Competence Centre is not

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only plugged into the European statistical ecosystem but also aligned with official methodological developments. This board plays a crucial role in ensuring that the methodologies used by the European Competence Centre are robust, comparable, and in line with international standards. Its members also contribute to capacity-building activities, helping destinations strengthen their “data literacy” and supporting a productive exchange between data producers and users. In some cases, they have also taken part in cluster sessions to support pilot DMOs (e.g., INE Spain in the cluster on the redistribution of tourism flows in space and time).

- **The DMOs and Ecosystem Board** operate at the heart of the tourism marketplace. Composed of umbrella organisations, destination networks, and hubs representing Destination Management Organisations at all governance levels (national, regional, and local), together with SMEs from the tourism value chain, it gives the European Competence Centre direct access to the perspectives of future customers. This board engages with both destinations involved in the pilot scheme and others beyond it, providing a rich and diverse base for feedback and co-creation. They advise on refining service specification and also gauge the potential for long-term engagement, laying the groundwork for a smooth transition from pilot participation to sustained, possibly fee-based, service relationships once the European Competence Centre moves beyond its initial funded phase.

Together, these two boards form a powerful and complementary mechanism for both quality assurance and market development. The Statistics and Research Board ensures the credibility and methodological soundness of the European Competence Centre’s outputs, guaranteeing that its analytics and advice meet the highest standards and remain relevant in the rapidly evolving landscape of European and international tourism statistics.

At the same time, it helps official statistics reach their final users and feeds back the needs that should be reflected in them, so they better capture what truly matters for tourism policy. The DMOs and Ecosystem Board, meanwhile, acts as a feedback forum, embedding the European Competence Centre’s activities in the operational reality of destinations and tourism businesses, and ensuring that services are tailored to real needs, aligned with existing initiatives, and backed by a community of engaged users, avoiding duplication and competition with the work of other actors.

In business model terms, the Advisory Boards are not peripheral; they are core partners and critical resources. They anchor the European Competence Centre within authoritative European networks, enhance its reputation, and provide early validation of its service offering. At the same time, they could act as a pipeline for customer acquisition, creating a ready community of destinations and ecosystem actors who have co-created, tested, and endorsed the European Competence Centre’s portfolio. As a result, they are well-positioned to become long-term users and advocates once the Centre becomes fully operational and self-sustaining. Their composition and level of participation will ultimately depend on the final legal form adopted for the Centre.

2.4 Interviews with leading European tourism organisations

The D3HUB consortium initiated a series of strategic conversations with key European tourism organisations to explore how they can actively shape and benefit from the future European Competence Centre. The purpose of these meetings has been to identify how the Centre can complement and scale up each partner’s existing research, data analytics, and knowledge-sharing services, while avoiding duplication of effort and maximising opportunities through European-level collaboration.

The organisations that participated in this round of interviews were:

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- [European Travel Commission](#) (ETC)
- [City Destination Alliance](#) (CityDNA)
- [European Tourism Association](#) (ETOA)
- [Eurostat](#)
- [Joint Research Centre](#) (JRC)

These organisations were selected according to the following criteria:

1. Entities with a recognised leadership role in the European tourism ecosystem, whose mandates, networks, and expertise position them as key influencers in shaping sector-wide approaches to data, research, and destination management. This included both representative bodies, such as the European Travel Commission, City Destination Alliance, and ETOA, that aggregate and amplify the needs of their member destinations and businesses, as well as institutional actors like Eurostat and the Joint Research Centre, which define and maintain the statistical and methodological frameworks underpinning European tourism data.

2. Complementarity with the European Competence Centre’s objectives. Each of them operates in a domain that complements, but does not duplicate, the Centre’s intended service portfolio. This enables a productive dialogue on how to align efforts, integrate resources, and address gaps in the current European tourism data landscape, thereby avoiding redundancy while strengthening the collective offer available to destinations and their ecosystems.

3. Strategic alignment (see [European Competence Centre position and case for existence](#)) **with the long-term mission of the European Competence Centre.** All participating organisations share a commitment to advancing data-driven decision-making, supporting the twin green and digital transition of the tourism sector, and fostering collaborative approaches across governance levels and market actors. By engaging them early in the design phase, the project ensured that the European Competence Centre’s business model would be informed by stakeholders whose visions, priorities, and operational realities resonate with its own, creating a strong foundation for enduring partnerships and mutual value creation.

2.5 Dialogue with the EU Institutions

The D3HUB Partnership has been maintaining an ongoing dialogue with the European Commission and relevant EU Institutions, so far with the EU Parliament and the Committee of the Regions, to connect the Competence Centre to the new European agenda, especially the upcoming tourism strategy and the next Multiannual Financial Framework.

The partnership’s main position has been that the European Competence Centre to Support Destinations in Data Management must become a priority within the upcoming European Sustainable Tourism Strategy and serve as the main instrument to deliver it.

Besides the already justified case for existence and the unique value proposition elements, which follow in the next section, the partnership and the stakeholders involved – both Advisory Board Members and pilot DMOs, see the need to guarantee consistency and legacy of the EU investments and alignment with the key European stakeholders involved in tourism and data: The Competence Centre is already addressing the challenges and providing solutions that match with the priorities evoked by Commissioner Tzitzikostas which he intends to address with the European Sustainable Tourism Strategy that his services are preparing and which a stakeholders consultation is publicly available.

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3 European Competence Centre Business Model

3.1 Vision, Mission, and Unique Value Proposition

The D3HUB Partnership defines the European Competence Centre to Support Destinations in Data Management as the **reference hub, empowering destinations to design and implement their data strategies**. This allows them to systematically measure impacts leading to strategic decisions, making their destinations more **sustainable and competitive**.

VISION

"We believe in a Europe where local, regional, and national destinations harness the power of trusted, interoperable data to make better decisions and accelerate their transition to a green, digital, and sustainable future."

Indeed, data-driven management is the cornerstone of a tourism ecosystem that is not only competitive and resilient but also environmentally responsible and socially inclusive. By turning knowledge into action, data into shared value, we aim to empower European destinations to lead the global transition towards a green, digital, and sustainable future for tourism.

MISSION:

The European Competence Centre to Support Destinations in Data Management offers accredited, specialised advice, training, and guidance to destinations to define and implement data strategies tailored to their own ecosystems and address their specific challenges for more sustainable destination management.

The Competence Centre would fulfil this mission by:

- 1. Supporting tourism destinations in their dual transition:** Provide tailored services spanning basic data literacy to advanced analytics and predictive modelling, making the benefits of European data initiatives accessible to all destinations, regardless of size or maturity.
- 2. Facilitating knowledge transfer and fostering collaboration:** Act as a European knowledge hub where destinations, industry associations, SMEs, public authorities, data and solution providers, and research bodies exchange insights, methodologies, and tools. Promote peer-to-peer learning and structured capacity-building paths, ensuring that destinations can progress step by step from data collection to sophisticated governance models.
- 3. Bridging the gap between local needs and European policy frameworks:** Function as a feedback loop for European institutions by capturing real-world challenges, barriers, and priorities from destinations and SMEs. Ensure that EU tourism policies, the European Tourism Data Space, and statistical tools are informed by practical needs, thereby driving greater adoption and stronger impact.

UNIQUE VALUE PROPOSITION

"The European Competence Centre to Support Destinations in Data Management empowers destinations to build and implement their own data strategies, acting as a trusted, independent partner that fosters self-sufficiency through collaborative learning, multilingual support, and actionable tools."

Indeed, the European Competence Centre to Support Destinations in Data Management offers a combination of **neutrality, sectoral specialisation, and actionable service delivery**, and strategic position between DMOs and key players in the field of tourism measurability, including the EU official statistics/dashboard providers, that no other European initiative currently provides.

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This UVP is built on multiple foundations:

1. **Independent and trustworthy entity**

- Operates without hidden interests, ensuring transparency and neutrality.
- Provides a **safe and credible environment** for destinations and SMEs to seek guidance, thus reinforcing trust across the European tourism ecosystem.

2. **Community-driven and collaborative**

- Positions itself as a **co-creation hub**, engaging destinations, SMEs, and associations in shaping services and methodologies.
- Encourages **collective problem-solving** through peer-to-peer learning, joint research themes, and collaborative projects.

3. **Proprietary methodologies and tools**

- Develops its own methodologies for managing visitor flows, balancing resident–visitor interests, and supporting emerging destinations.
- Provides an **open-source dashboard** for benchmarking, monitoring, and visualising sustainability and competitiveness indicators.

4. **Structured learning paths and roadmaps**

- Provides not only ad hoc services but also **stepwise competence-building pathways**, allowing destinations to advance their data maturity progressively.
- Prioritises "learning to do" over "doing for you," equipping destinations with the skills and tools to manage data, sustainability, and competitiveness independently.
- Supports long-term transformation rather than isolated interventions.

5. **Accredited expert network**

- Builds a **pool of accredited external experts** (consultants, IT firms, statisticians, sustainability specialists).
- Guarantees scalability and high-quality service provision across the continent, while fostering a European market of trusted tourism data professionals.

6. **Multilingual and localised services**

- Delivers services in multiple European languages, a distinctive feature that makes the Centre accessible to destinations of varying sizes and capacities.
- This approach ensures **proximity, inclusiveness, and cultural alignment** across the EU tourism ecosystem.

7. **Actionable, decision-oriented data solutions**

- Goes beyond data collection and analysis by translating insights into **practical strategies, governance models, and policy recommendations**.
- Prioritises **decision-making support** over purely academic or technical outputs.

8. **Holistic cross-sectoral integration**

- Tourism's inherently interconnected nature, spanning hospitality, transportation, cultural heritage, technology, energy, sustainability, accessibility, and local economic development, demands solutions that transcend traditional sector boundaries. Unlike isolated sector-specific initiatives, the European Competence Centre adopts a holistic approach that facilitates collaboration across diverse tourism-related stakeholders, projects, and initiatives. This cross-sectoral positioning enables the Centre to address complex, multifaceted challenges that cannot be solved by single actors operating in silos.
- The European Competence Centre serves as a nexus point for knowledge exchange and technology transfer across the entire tourism value chain, connecting DMOs with relevant expertise from complementary sectors and initiatives. By bridging sector silos and orchestrating integrated solutions, the Centre ensures that the support it provides

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reflects the sector's complexity and delivers complete, ecosystem-level outcomes rather than fragmented interventions.

9. Complementarity and amplifier of impact

- Thanks to its close contact with the European Tourism Ecosystem, the European Competence Centre will act as a strategic feedback loop, informing all other initiatives of the real needs, requirements, and priorities. This will allow other initiatives to align their activities with those needs.
- Ensures that EU-funded projects and statistical frameworks achieve maximum uptake and impact at the destination level
- Offers **tourism-specific contextualisation** of broader EU frameworks, which often lack direct applicability at the destination level.

3.2 Ecosystem: Users, partners, and service providers

As described, the European Competence Centre is being designed to be embedded in a highly interconnected ecosystem spanning destinations, public authorities, SMEs, statistical bodies, technology providers, and European networks. Its success depends on clearly positioning itself as a **neutral broker, catalyst, and enabler** within this ecosystem, while building strategic partnerships and ensuring alignment with EU values and initiatives.

Users and clients

First stage: National, regional, and local destination management organisations (DMOs) seeking EU-aligned sustainability frameworks, harmonised statistical reporting standards, and robust benchmarking capabilities. These DMOs require advanced analytical tools for sustainability monitoring, tourism flow management, and competitiveness assessment, as well as practical solutions to balance resident and visitor interests, monitor short-term rentals, and evaluate carrying capacity.

Medium stage, which requires a previous period of test: Tourism SMEs, which form the backbone of local visitor economies, will also benefit indirectly from the Competence Centre's activities through the enhanced capacities of the DMOs that support and coordinate them, improving the overall sustainability and competitiveness of Europe's tourism ecosystem.

Partners

To ensure a credible and scalable service portfolio, the Competence Centre requires a **robust partnership base** that complements its mission:

- **European umbrella organisations** serving as multipliers and access channels to the DMO community, including **European networks and industry associations**: co-investing in training, benchmarking, or co-branded initiatives for their members.
- **Official statistical bodies**: Eurostat, National Statistical Offices, OECD, and UN Tourism, which provide authoritative data and ensure methodological alignment.
- **Cross-sectoral initiatives, such as other Competence Centres and Digital Innovation Hubs**: ensuring that tourism destinations receive comprehensive support across all dimensions of their challenges
- **EU institutions and initiatives**: DG MOVE, JRC, ETDS, anchoring the CC within broader EU strategies and policy frameworks.

This way, the European Competence Centre builds on a strong partnership ecosystem that ensures both credibility and scale. European umbrella organisations connect it to the DMO community, while

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statistical bodies and EU institutions provide authoritative data and policy alignment. Together, these partners anchor the European Competence Centre as a trusted hub for Europe's data-driven tourism transition.

Service providers

To deliver high-quality, scalable, and EU-aligned services across Europe, the European Competence Centre will rely on a network of quality-assessed service providers. These partners extend the European Competence Centre's operational capacity by delivering specialised expertise, technical solutions, and training programmes:

- **Private consulting firms and expert networks** will play a dual role. First, they act as accredited providers of advisory and mentoring services, delivering tailored consultancy packages under the European Competence Centre umbrella. Second, they provide highly specialised expertise. To safeguard neutrality and quality, the European Competence Centre will establish a certification and validation scheme to ensure that private firms meet EU-aligned standards before being contracted. This system guarantees that DMOs receive consistent, comparable, and credible support irrespective of the provider.
- **IT providers, analytics companies, and technology integrators** represent another essential service group. They co-develop and deploy digital tools, such as dashboards for monitoring visitor flows, AI-powered forecasting solutions, and open-data platforms, in close collaboration with the European Competence Centre and in an interoperable manner.
- **Training organisations and academic partners** will also be recognised as service providers. They will contribute expertise on sustainability indicators, visitor flow modelling, and governance innovation, and support the delivery of the European Competence Centre's structured learning and capacity-building pathways by producing modular curricula, facilitating webinars, running peer-to-peer learning activities, and leading certification programmes.

3.3 Service Portfolio

The Competence Centre's Service Portfolio is designed to provide support to European Destination Management Organisations throughout the entire journey towards data-driven destination management, helping destinations in understanding current and future challenges, identifying potential data sources, statistics and tools, providing expertise in data collection and calculation, developing insights through analysis and interpretation, offer actionable advice on using data for destination management and supporting the broader tourism ecosystem.

The D3HUB Partnership envisions the Competence Centre's services to be structured in **4 main pillars**:

1. Core service: Capacity building path for European DMOs

A progressive learning path that DMOs can join regardless of their maturity level. The path is designed to equip the DMO to define and implement its **data strategy** through a **staged journey**, moving from **entry-level literacy to advanced strategic leadership**.

Through this capacity building and learning path, the European Competence Centre aims to harmonise knowledge and practices across European DMOs, ensuring that destinations evolve toward sustainable, resilient, and competitive tourism models:

- Increasing data literacy and evidence-based decision-making.
- Leading the green and digital transition of their ecosystems.
- Aligning with EU tourism strategy and priorities (e.g., sustainability, resilience, digitalisation).

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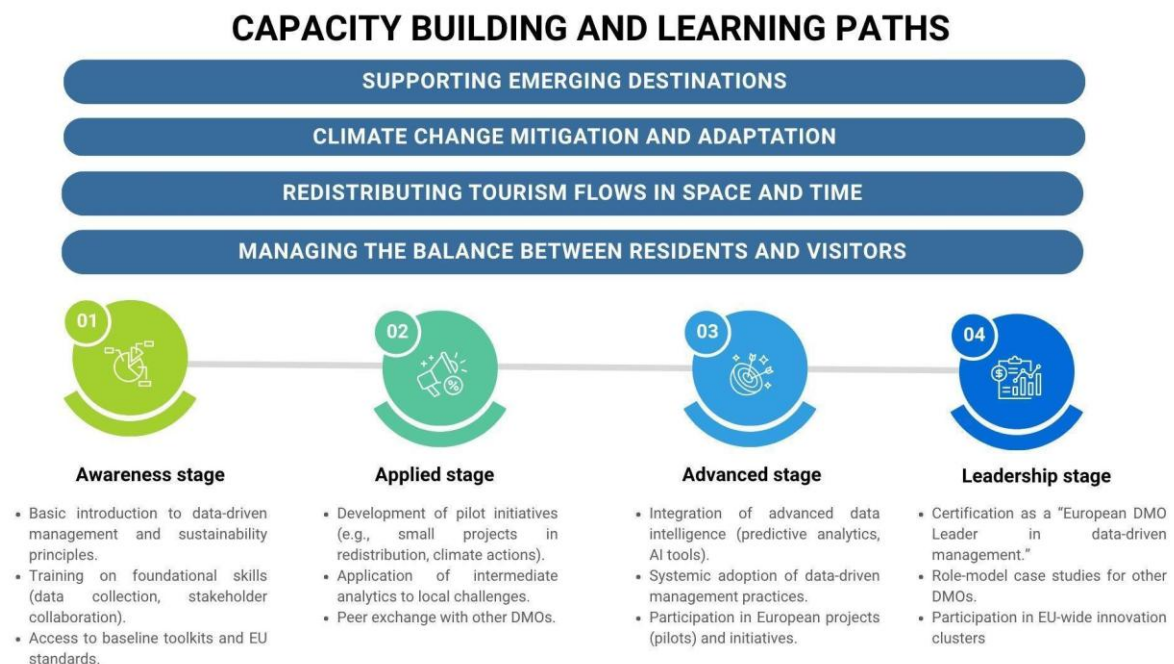


- Strengthening collaboration and knowledge exchange across borders.

The European Competence Centre will ensure harmonised knowledge transfer across Europe while enabling local adaptation. Program delivery will engage multiple knowledge partners, in line with the European Competence Centre's overarching objective of integrating key tourism actors at the European level.:

- 1) Universities and Research Institutes: providing scientific expertise and innovative approaches.
- 2) Tourism stakeholders from both the public and private sectors: ensuring alignment with the sector's needs.
 - Consultancies and experts: providing practical implementation guidance.
 - EU entities and policy makers: ensuring alignment with European regulatory frameworks and funding.

Figure 5 Different stages of the learning path offered by the European Competence Centre to European DMOs



2. Outsourced research and implementation support

A key strength of the Competence Centre lies in its ability to **act as a trusted partner to European and international institutions that need sector-specific tourism expertise** but lack the internal resources to deliver it. Many EU bodies, statistical agencies, and international organisations develop valuable methodologies, frameworks, or pilot actions, such as sustainability indicators, data-sharing protocols, or policy guidelines; yet, they often face constraints in conducting applied research or implementing these initiatives at the local level. As described earlier, this creates **a gap between policy design and real-world adoption, undermining the intended impact**.

The Competence Centre **addresses this gap by offering outsourced research and implementation support services**. Leveraging its sectoral expertise, its neutral positioning, and a pool of certified experts across Europe, the Centre can design and deliver applied research studies, conduct impact assessments, and pilot the roll-out of EU frameworks in collaboration with local DMOs and SMEs.

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This ensures that EU-level innovations are not only conceptually sound but also practically tested and adopted in diverse destination contexts.

By providing these services, the Competence Centre enhances the effectiveness of EU tourism strategies, reduces duplication of effort, and optimises resources. It reinforces the Centre's role as a catalyst that connects policy with practice, ensuring that institutional ambitions translate into measurable change on the ground. Moreover, by acting as a neutral broker, the CC safeguards the credibility and inclusiveness of these initiatives, avoiding potential conflicts of interest with private providers while strengthening Europe's collective capacity to innovate in tourism.

In concrete terms, the Competence Centre will offer:

- **Applied research studies and comparative analyses:** Conducting complementary, practice-oriented studies in collaboration with existing research bodies and institutions. The Centre will contribute by translating research into operational insights, facilitating data access, and coordinating comparative analyses on topics such as sustainable tourism indicators, visitor flow management, climate adaptation, and the socio-economic impacts of tourism.
- **Implementation of EU frameworks at the local level:** Supporting DMOs and national authorities in adopting methodologies such as the European Tourism Data Space, the Tourism Sustainability Indicators, or other statistical and monitoring frameworks.
- **Policy experimentation and pilot projects:** Acting as an operational arm to test EU-designed solutions in real destinations, ensuring feedback loops between local practice and EU policymaking.
- **Monitoring and evaluation services:** Providing independent assessments of the uptake and effectiveness of EU tourism policies and instruments, ensuring transparency and accountability.

Through this service line, the Competence Centre positions itself as the applied research and implementation partner for European tourism, ensuring that policies do not remain on paper but are translated into meaningful outcomes at the destination level.

3. Decision-support and digital solutions

For Europe's tourism sector to thrive amid rapid transformation, **destinations require** not only access to reliable data but also **the ability to translate that data into concrete decisions**. While large volumes of data exist, they are often fragmented, not interoperable, or complex to apply directly to destination management. Many DMOs and SMEs lack the analytical tools and frameworks needed to turn raw data into actionable strategies. This gap hampers the sector's ability to design effective policies, monitor sustainability, and remain competitive internationally.

The Competence Centre addresses this challenge by providing decision support and digital solutions that bridge the divide between data availability and data usability. Its positioning is deliberately technology-agnostic, ensuring that destinations are not locked into any single platform, provider, or methodology, even in a fast-moving technological environment accelerated by the advent of artificial intelligence and continuous waves of digital innovation. **Such neutrality is critical.** It allows the Centre to act as a trusted, independent broker, guiding destinations towards solutions most suitable to their specific contexts, free from conflicts of interest.

To guarantee this impartiality, the Competence Centre will rely on a dedicated technology partner that combines technical expertise with a clear mandate to remain conflict-free and aligned with the public interest.

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A defining feature of this service area is its practical orientation: the Competence Centre does not stop at data collection or reporting. Still, it develops decision-making frameworks and scenario-modelling tools tailored to real-world management problems. By **combining open-source dashboards, proprietary indices, curated data access, and analytical methodologies**, the Centre enables destinations to **move from monitoring to strategic planning and governance innovation**, always with the assurance that the chosen technologies serve their needs rather than dictate them. Following this principle, the Competence Centre will provide the **following services, combining digital tools with methodological guidance in a technology-neutral way**, ensuring that destinations can adopt the solutions best suited to their context while strengthening **evidence-based decision-making across Europe's tourism ecosystem**:

- **Open-Source benchmarking dashboard**: A central tool providing comparable KPIs on tourism sustainability, climate impacts, visitor flows, and socio-economic effects. Built to integrate with the future European Tourism Data Space and aligned with Eurostat and OECD frameworks.
- **Proprietary tourism sustainability benchmarking**: Development of tourism sustainability benchmarking, aligned with the UN Tourism SF-MST and other international standards, adapting them to destinations' practical data and policy needs.
- Resident-visitor balance frameworks, and climate impact assessment methods, enabling destinations to adopt harmonised yet customizable approaches.
- **Data access facilitation**: Acting as a gateway to statistical bodies and private providers, the Centre will curate, negotiate access to, and ensure the interoperability of critical datasets (e.g., mobility, accommodation, expenditure, climate risk).
- **Decision-making support tools**: Translation of raw data into actionable insights and scenario modelling for policy and management, going beyond monitoring to strategy design.

4. Ecosystem facilitation and knowledge exchange

Beyond tools and training, the Competence Centre is designed to act as a hub for collaboration, knowledge transfer, and policy alignment across the European tourism ecosystem. Destinations, SMEs, and public authorities often work in silos, with fragmented access to expertise, best practices, and policy guidance. This lack of coordination results in duplication of efforts, uneven adoption of innovative solutions, and missed opportunities for scaling successful practices.

The Competence Centre **addresses this gap by providing a neutral, trusted platform where knowledge, expertise, and feedback converge**. By curating a hub of proven solutions, certifying reliable experts, and facilitating structured exchanges, the Centre **helps destinations navigate complexity and identify the most suitable approaches and partners for their specific challenges**. At the same time, the Competence Centre catalyses collaboration, facilitating the exchange of best practices between stakeholders and ensuring that they are amplified, transferred, and scaled across Europe's diverse tourism ecosystem.

Equally important, it **establishes a permanent feedback loop between the realities on the ground and the European policy framework**, ensuring that initiatives such as the **European Tourism Data Space** and the **EU Tourism Dashboard** remain relevant and practical.

This role as a connector is underpinned by inclusivity. By providing **multilingual service delivery and maintaining close ties with DMOs and SMEs across all Member States**, the Competence Centre guarantees that no actor, large or small, central or peripheral, is excluded from the benefits of Europe's data-driven transition. In doing so, it **strengthens the cohesion, competitiveness, and sustainability of the tourism sector as a whole**.

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To achieve this objective, the Competence Centre will provide the **following services**, ensuring that European destinations can access trusted knowledge, reliable expertise, and a direct voice in shaping the policies and tools that will govern their future:

- **Best Practice repository and knowledge marketplace:** A curated platform showcasing proven solutions, innovative providers, and benchmark studies to guide DMOs in selecting suitable approaches and technologies.
- **Certification of experts and providers:** Establishing a quality-assured pool of consultants, IT firms, and academic experts, enabling destinations to access reliable external support while building a European standard of excellence.
- **Policy feedback and alignment:** Serving as a structured feedback loop from destinations and SMEs into EU tourism policies, ensuring that EU-level tools (ETDS, Eurostat dashboards, TSI frameworks) respond to real needs and are effectively adopted at the local level.
- **Multilingual service delivery:** Offering services in multiple EU languages, recognising the importance of accessibility and inclusivity across diverse cultural and institutional contexts.

The Competence Centre's approach: A demand-driven approach through "Thematic Service Clusters"

The European Competence Centre's service portfolio is structured around **thematic clusters** that reflect the most pressing challenges currently faced by European destinations. These clusters are the outcome of a broad consultation process with the EU tourism sector, including surveys, workshops, and interviews with DMOs, SMEs, associations, and policy actors. Their purpose is clear: to ensure that the Competence Centre delivers solutions directly **focused on solving real problems** encountered by destinations in their daily management:

1. **Managing the balance between residents and visitors:** measuring perceptions, analysing short-term rentals, assessing carrying capacity.
2. **Redistributing tourism flows in space and time:** tools for monitoring, forecasting visitor flows, and intervention design.
3. **Climate change mitigation and adaptation:** emission monitoring, adaptation governance, and decarbonisation strategies.
4. **Supporting emerging destinations:** resilience building, branding and promotion through smart specialisation, and local capacity development

A defining principle of the Competence Centre is its commitment to **continuous alignment with sector needs**. The thematic clusters are not static; they are designed to be updated and refined over time as new priorities emerge, ensuring the Centre remains relevant and future-oriented. This approach positions the Competence Centre as a **living interface between the European tourism community and EU-level initiatives**, constantly monitoring trends, capturing feedback, and translating challenges into actionable services.

In this way, the Competence Centre ensures that its service offering is not only methodologically robust and technologically advanced but also **practical, demand-driven, and responsive**, thereby anchoring its role as the trusted partner of European destinations in their green, digital, and sustainable transition.

3.4 Governance and legal structure

This section of the European Competence Centre to Support Destinations in Data Management's business plan is presented in the form of hypotheses and scenarios. Indeed, defining the Centre's

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Governance and Legal Structure is an interlinked set of elements, one consequential on the other, both of which require further analysis and discussion with the Advisory Board Members, the European Commission, and the pilot DMOs.

As described across the document, the Competence Centre's unique position is enabled by several key factors:

1. A balanced shareholder structure, bringing together umbrella organisations that represent all levels of destination governance, alongside private entities delivering data services and official statistical bodies.
2. A responsible business framework, ensuring that all activities are conducted in line with sustainability principles and fair market competition rules.
3. Institutional recognition and legitimacy, through endorsement by the European Commission, validation of methodologies, and empowerment to act as a certifying authority for quality and reliability in tourism data management.

Scenarios for Governance and Strategic Partnerships

The D3HUB Partnership's assumptions when it comes to the Competence Centre's governance are:

1. The success lies in the commitment and involvement of a wide range of public and private data players, as well as in the EC's endorsement:
 - Therefore, an ongoing dialogue leading to secure strategic partnerships will be intensified during the first quarter of 2026.
2. The D3HUB measurement methodology and dashboard, produced by the D3HUB consortium, will be key in the development
 - Therefore, this hypothesis requires formal validation by the EISMEA and political endorsement by the European Commission in the framework of the new European Tourism Strategy, revision of the revision "**Regulation concerning European statistics on tourism**" led by Eurostat, and any future development of the European Tourism Dashboard that the JRC may implement in the future on behalf of the European Commission DG MOVE.
3. The future EU Tourism Strategy will include, among other flagships, solutions to empower DMOs in accelerating the green-digital transition towards more resilient destinations, including the launch of a European Tourism Academy, for which the legal form is yet to be defined.
 - Therefore, the Competence Centre must be aligned with these to optimise the existing knowledge and expertise and to avoid any possible duplication with any new initiative that the European Commission would deploy in this field.

The D3HUB Partnership

Since the launch of the D3HUB call by EISMEA the EU Commission has made substantial progress in deploying a wide range of EU tourism-data-related initiatives, in the framework of the EU Data Strategy and Data Act: EU Tourism Data Space, the EU Sustainable Tourism Project, the project "Facilitate" while, as already mentioned, the DG Move prepares the future European Sustainable Tourism Strategy that will include the deployment of a European Tourism Academy.

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Equally important is the above-mentioned revision of the [Regulation concerning European statistics on tourism](#), led by Eurostat. Meanwhile, both the **OECD and the UN Tourism are intensifying efforts to standardise sustainable tourism metrics** for policy-making. In this context, the common interest of the UN Tourism, Eurostat, the European Commission, the JRC, the OECD, and national institutions, as evident in the recent Austrian Ministry meeting in Vienna during the first week of September, underscores the priority of moving towards a unified system of indicators. This is also a core task of the Competence Centre, which is already testing some of these indicators with 40 destinations to identify priorities, assess feasibility, and move towards a compilation guideline, in close cooperation with our Board members.

Meanwhile, the D3HUB partnership has been running the EU Competence Centre to support data management in tourism Destinations' Data by delivering **capacity-building-oriented services to 40 pilot European Destination Management Organisations, helping them make better decisions through data.**

This involves **defining a common set of meaningful, useful, and shared indicators** across territories facing the aforementioned similar challenges, each in its own unique setting and context. This set of indicators and the methodology behind it were **based on internationally agreed standards**. The indicators draw directly from the latest proposals aligned with the **UN Tourism Statistical Framework for Measuring the Sustainability of Tourism (SF-MST)**. Both the **JRC and Eurostat** have analysed and provided feedback to secure their alignment with the EU Tourism Dashboard and EUROSTAT's ongoing work on sustainability in tourism statistics, as both organisations are represented on the [D3HUB Advisory Board](#).

Consequently, the D3HUB partnership is developing unique and valuable expertise in coaching this group of DMOs, gathering a sound overview of their needs, challenges, good practices and solutions which the future European Tourism Data Competence Centre could use in developing its terms of reference for future operations, while developing the capacity to co-create and support the delivery and implementation of the new European Tourism measurement framework.

For this, the D3HUB partnership is ready to support a minimum viable product for the Competence Centre, for which the appropriate legal entity needs to be defined, in collaboration with the European Commission, the D3HUB Advisory Board, and the 40 pilot destinations.

Legal structure options

The long-term sustainability and institutional legitimacy of the European Competence Centre will depend on the selection of an appropriate legal structure.

As detailed in Deliverable D5.1 *Detailed Organisational and Functional Structure of the European Competence Centre*, the D3HUB project has examined several potential legal forms, each carrying specific implications for governance, funding, and stakeholder participation.

At this stage, the analysis remains open. The final decision will be informed by continued dialogue with European institutions, project partners, and pilot destinations. Given that one possible option is to establish the headquarters in Andalusia, Spanish legislation must also be carefully considered, as it will condition the legal viability and administrative requirements of the chosen structure.

The shortlist of viable legal structures comprises:

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1. **A Non-Profit Association** established under national or international law, depending on the host country (Spain);
2. **A Foundation** constituted either nationally (Spain) or internationally, and
3. **An embedded structure within an existing** European or international organisation. A subsidiary or branch in Spain.

1. Non-Profit Association

- **Rationale:**

The *non-profit legal form widely adopted by pan-European organisations based in Belgium and other EU countries* provides formal legal personality under the *Country Code on Companies and Associations*. It offers both flexibility and credibility at the European level.

- **Advantages:**

- Ensures a neutral and non-profit orientation consistent with the CC's mission to serve the public interest of the European tourism ecosystem.
- Facilitates broad and inclusive membership from public and private stakeholders, including DMOs, SMEs, technology providers, universities, and EU-level associations.
- Provides democratic governance mechanisms, supported by clearly defined statutes and transparent decision-making procedures.
- It is familiar to EU institutions, thereby facilitating cooperation, recognition, and potential access to EU funding mechanisms..

- **Challenges:**

- Requires a critical mass of founding members willing to commit both financially and strategically.
- Involves compliance with the country's corporate reporting and accounting obligations, including annual filings and potential VAT considerations.

- **Strategic Implications:**

- The non-profit association model represents a viable framework for ensuring openness, inclusivity, and participatory governance. Its effectiveness, however, will depend on successful stakeholder mobilisation and the establishment of a clear membership value proposition.

2. Foundation

- **Rationale:**

- In contrast to associations, the foundation model provides a mission-driven and institutional framework that emphasises neutrality, permanence, and a public-benefit purpose. Foundations are established based on statutes and an endowment, ensuring stability and independence from fluctuating membership structures. This model can be particularly effective in research-intensive or policy-oriented environments.

- **Advantages:**

- Guarantees a clear non-profit and general-interest orientation, reducing the risk of influence by particular member groups or political agendas.

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- Provides long-term stability through a statutory framework and endowment, rather than variable membership fees.
- Serves as a well-recognised legal vehicle across Europe for independent knowledge or competence centres.
- Can attract diversified funding streams, including public-private partnerships.
- Can be positioned as a neutral steward of public goods, such as data governance methodologies and benchmarking standards.
- **Challenges:**
 - Requires a substantial initial endowment, which can be challenging to secure at the outset.
 - Provides limited governance flexibility; stakeholders generally have no formal voting rights, which could reduce ownership among sector participants.
 - May adapt more slowly to evolving priorities due to the rigidity of statutory requirements.
 - Foundation law varies across Member States, necessitating careful analysis of the host country's legal and supervisory framework.
- **Strategic implications:**
 - The foundation model would signal neutrality, continuity, and long-term commitment to the public interest. It could effectively position the CC as a custodian of European public goods in tourism data management. However, the absence of a participatory governance layer could diminish stakeholder engagement unless complemented by an advisory council or other consultative mechanisms.

3. Embedded in an existing body

- **Rationale:**
 - Establishing the CC within an existing European or international organisation (NECSTouR, ETC,...) could substantially reduce start-up costs and administrative complexity while leveraging pre-existing infrastructure, governance mechanisms, and institutional credibility.
- **Advantages:**
 - Achieves economies of scale and streamlined administrative processes.
 - Grants immediate access to established networks, operational expertise, and brand recognition.
 - Enables rapid operationalisation, avoiding complex incorporation procedures and delays
- **Challenges:**
 - Creates a high risk of diluting the European Competence Centre's independent identity and visibility.
 - May give rise to misalignment of mandates or conflicts with the host organisation's strategic priorities.
 - Limits autonomy in determining long-term strategy, budgetary allocation, and external representation.

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- Unless contractually specified, it may deprive the CC of separate legal personality, thereby restricting its capacity to hold assets, enter into contracts, or assume liability independently.
- It limits the participatory Governance of other tourism stakeholders.
- **Strategic Implications:**
 - While administratively efficient, this model may constrain the CC's independence and capacity to act as a neutral, pan-European hub for the tourism ecosystem. If adopted, safeguards such as a dedicated governance board, ring-fenced budget, and clear decision-making authority should be contractually established to preserve autonomy and stakeholder trust.
 - Within the option of integrating the CC into an existing body, we need to consider a subsidiary or a branch located in Spain (potentially, Andalusia).

At this stage, no final decision has been taken. Each of the above legal models presents distinct advantages and constraints regarding independence, flexibility, funding, and institutional legitimacy.

The decision on legal form should therefore remain open and be informed by:

- The outcomes of the pilot phase and feedback from the EU tourism stakeholders (destinations, SMEs, associations, public EU entities, etc.).
- Dialogue with EU institutions regarding long-term anchoring and funding.
- Benchmarking against other European Competence Centres (e.g., in cybersecurity, social innovation, supercomputing).

This phased approach ensures that the CC's governance and legal structure evolve in step with its mission, stakeholder needs, and European policy context.

In developing the Business Plan, potential limitations or constraints associated with each legal form will be explicitly noted in the relevant sections. Where such constraints may impact service delivery, governance, or financial sustainability, different working hypotheses will be described to illustrate how the business model might operate under alternative legal scenarios. This approach ensures that the Business Plan remains adaptable, resilient, and fully informed by the structural realities that will shape the future Competence Centre.

Legal Form	Legal Personality	Governance Model	Financial Autonomy	EU Recognition Potential
Non-Profit Association	Yes	Democratic (member-based)	Moderate	High
Foundation	Yes	Centralised (board-driven)	High	High
Embedded Structure	Usually NO	Dependent on host	Limited	Medium

Table 2: Potential legal forms of the European Competence Centre.

The initial legal configuration of the European Competence Centre may serve as a transitional arrangement to enable its timely establishment and early operations. As the Centre evolves and its

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mandate expands, its legal status may be reviewed and adapted to better align with its strategic objectives, financial model, and European recognition. This flexibility will ensure that the Competence Centre can, where appropriate, transition into a more autonomous and impactful structure, in full compliance with European and national legal frameworks and in consultation with the European Commission and relevant partners.

3.5 Resources and revenue streams

It is important to emphasise that the current business model is based on the information available to date. The pilot phase, currently underway with forty destinations, will generate new evidence on the effectiveness of services, user preferences, and revenue potential. These results will lead to refinements and adjustments to the business plan. The European Competence Centre is conceived as a dynamic entity, capable of evolving in response to the needs of destinations and the broader policy environment.

Ensuring financial sustainability beyond the initial EU funding is a cornerstone of the business model.

Currently, the most probable funding scenario appears to be a hybrid revenue approach, therefore the combination of several sources of public-private funding, including an initial substantial capital coming from the EU to run the first years of the Competence Centre as the clients and partners exponentially grow:

- Framework agreements, including a potential “ad-hoc grant” with European institutions such as DG MOVE and the JRC, will provide stability through specific contracts for studies, monitoring frameworks, or policy-related work.
- Membership fees from DMOs willing to receive Competence Centre services, tiered by DMO size and level.
- A membership fee from private entities willing to access the Competence Centre knowledge hub..
- Pay-per-service income may be possible, deriving from previously agreed consulting assignments, tailored mentoring, certification schemes, and the customisation of digital tools.
- MFF 2028-2034: The proposed Competitiveness Programme and National and Regional Partnership Plans could serve as European financial instruments to co-finance the Competence Centre’s activities.

These hypotheses require further analysis and discussion with the institutions mentioned above. The results will be compiled into a comprehensive financial plan, including detailed resource and revenue stream schemes, which will be presented in one of the D3HUB project's final deliverables, “Sustainability Plan,” in October 2026.

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4 Conclusion

This business plan presents a concrete and evidence-based roadmap for launching and sustaining the European Competence Centre in Tourism as a neutral, demand-driven catalyst for data-informed destination management across Europe. Developed from the evidence and insights gathered to date through extensive needs assessments, pilot activities, and stakeholder consultations, it translates European tourism priorities into an operational model centred on capacity-building, evidence-based decision-making, and measurable impact for DMOs and their ecosystems.

The model rests on the following pillars:

- A clear value proposition, centred on providing independent guidance and curated knowledge that complement, rather than overlap, existing initiatives, positioning the Centre as an *impact multiplier* that delivers decision-oriented analytics and amplifies the value of Europe's tourism data ecosystem.
- A cross-sectoral partnership approach that recognises tourism's inherently interconnected nature, facilitating collaboration with competence centres and innovation hubs from complementary sectors (sustainability, digitalisation, energy, mobility, cultural heritage) to deliver integrated solutions that address the multidimensional challenges facing destinations, ensuring comprehensive support across the entire tourism value chain
- A comprehensive service portfolio, encompassing structured learning paths, peer-to-peer exchange, mentoring, and open digital tools designed to strengthen DMOs' analytical and operational capacities.
- An implementation approach grounded in real-world pilots with European destinations, ensuring that all services are practical, validated, and responsive to actual management challenges.
- A governance and legal framework that safeguards neutrality while allowing for scalability, long-term sustainability, and European-level recognition.

The business model is grounded in solid evidence gathered through deliverable D2.1: *Information Needs and Qualifications Report*, which shows that most DMOs face challenges in accessing and using data, require clear KPIs for economic impact and sustainability, and place high value on best-practice exchange and transparency. The proposed service portfolio responds directly to these needs, combining accessible group learning with tailored support and a streamlined set of analytical tools, while leveraging existing EU initiatives to enhance impact and avoid duplication.

Regarding services, deliverable D2.2: *Support Scheme Report* offers a pragmatic, modular blueprint to address concrete, real-world challenges faced by European DMOs. Each service module directly responds to operational needs, ensuring that solutions are practical, relevant, and results-oriented. This demand-driven approach enhances the Centre's capacity to deliver measurable impact. As pilots advance, the service portfolio will be further refined and structured, with "learning paths" consolidated based on varying levels of digital and data literacy maturity.

The pilot phase, running from February 2025 to February 2026 with 40 destinations, is currently validating the relevance and feasibility of the proposed service portfolio across four thematic clusters: resident–visitor balance, redistribution of visitor flows, climate mitigation and adaptation, and support for emerging destinations. While this business model reflects the most accurate and comprehensive information available at Month 24, the project remains in active development. As the pilots progress and their results are analysed during the final project year, new evidence and insights will be systematically incorporated. This will allow the business model to evolve dynamically, ensuring that by the end of the project, it captures the latest, most relevant findings needed to guide the successful establishment and long-term sustainability of the European Competence Centre.

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Several variables are appropriately framed as scenarios pending further evidence and stakeholder validation. Among them is the legal set-up. The deliverable *D5.1 Detailed organisational and functional structure of the Competence Centre Assessment* mapped viable forms, comparing governance, neutrality, VAT/fiscal treatment, liability, and EU-level recognition. Based on this analysis, a shortlist of the most suitable legal structures has been identified for the next stage of development. The final decision will depend on the outcomes of the pilot phase, partner commitments, and sustainability requirements, ensuring complete alignment between the Centre's legal personality, governance framework, and its mission of neutrality and European relevance.

Looking ahead to continuity and scale, this plan is closely aligned with forthcoming project deliverables. In particular, Deliverable D5.3: *Competence Centre's Sustainability Plan*, will complement the present business plan by defining concrete post-grant arrangements for governance, funding mix, staffing, and service expansion, integrating the evidence and stakeholder commitments gathered through the end of the D3HUB project. In parallel, the legal structure, location, and procedural setup will remain under review, assessed against the criteria established in D5.1 to safeguard the Centre's neutrality, operational efficiency, and recognition at the European level.

Finally, co-creation remains the cornerstone of the Centre's development. Throughout the remaining D3HUB project period, stakeholders will continue to be actively consulted, and strategic alliances will be pursued with European networks to ensure alignment, avoid overlaps, and strengthen complementarities. This continuous engagement will play a key role in refining and consolidating the Centre's activity portfolio, ensuring it is shaped through shared ownership, collective input, and collaborative governance. The business model presented here represents the best available synthesis of current insights but is conceived as a *living document* that will continue to evolve until the end of the project. As new evidence and lessons emerge from the pilot activities and stakeholder consultations, they will be progressively integrated to ensure the model reflects the most up-to-date and relevant information. This iterative approach will allow the European Competence Centre to Support Destinations in Data Management to launch on a solid, credible, neutral, and operationally ready foundation, capable of scaling sustainably and delivering tangible value to Europe's destinations.

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