



ANNEX 2 GUIDE FOR APPLICANTS

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3	MAGGIOLI SPA	MAG	Italy
4	Synelixis Solutions S.A.	SYN	Greece
5	Light and Shadows	LS	France
6	Scuola Universitaria Professionale Della Svizzera Italiana	SUPSI	Switzerland
7	Universiteit Maastricht	UM	The Netherlands
8	Hellenic Open University	HOU	Greece
9	Vereniging Van European Distance Teaching Universities	EADTU	The Netherlands
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LIST OF ABBREVIATIONS AND ACRONYMS

Acronym	Description
CET	Central European Time
EC	European Commission
EU	European Union
ESR	Evaluation Summary Report
IPR	Intellectual Property Rights
MRL	Market Readiness Level
MVP	Minimum Viable Product
NFT	Non-Fungible Tokens
OC	Open Calls
PIC	Participant Identification Code
SME	Small and Medium-sized enterprises
TRL	Technology Readiness Level
VAT	Value Added Tax
XR	Extended Reality

1 INTRODUCTION

The XR2LEARN (Leveraging the European XR industry technologies to empower immersive learning and training) is a project funded under the Horizon Europe framework Cluster 4-2022-HUMAN-01 (A Human-centred and Ethical Development of Digital and Industrial Technologies 2022).

Today, the interest for Virtual, Augmented or Mixed Reality (VR/AR/MR) - in general named using the term Extended Reality (XR) - is rising to unprecedented levels. The XR2LEARN project delivers a SW platform (XR2LEARN platform) around which it establishes a cross-border innovation community for XR in learning, bringing XR technology providers, application designers, education experts, application developers, end-users and decision makers in direct access to communicate, collaborate and matchmake interests enabling also bottom-up innovation creation.

XR2LEARN is a comprehensive platform that goes beyond providing technical and business support for the creation of XR applications for education. It offers access to authoring tools for application development. XR2LEARN incorporates tools for emotion/affect detection, allowing the system to adapt the learning experience based on the user's needs and emotions. It offers guidance and support for educational design, helping idevelopers define use cases and create effective XR applications tailored to specific learning objectives. Through its partnership networks, XR2LEARN provides opportunities for piloting and user testing of XR applications. XR2LEARN promotes the use of tools that enable and enhance the reusability and sharing of learning materials and XR applications. It offers comprehensive business development support to innovators and ICT-SMEs. This support encompasses the entire journey from ideation to commercialization, helping them navigate the challenges and opportunities in the market. XR2LEARN provides direct funding opportunities to innovators and developers and facilitates IPR management through the use of non-fungible tokens (NFTs). This innovative approach enables the implementation of novel business models, ensuring proper attribution and protection of intellectual property.

As a mean of enhancing the public awareness, boosting massive adoption and sustainability and ensuring engagement of 3rd parties, XR2LEARN will organize 2 open calls and embrace new members in the XR2LEARN ecosystem. The objectives of the open calls are:

- a) to increase EU competitiveness in the XR application market focusing on support to SMEs,
- b) to accelerate XR application design and development for education/training,
- c) to motivate collaboration between XR developers and education experts,
- d) to reduce the cost of XR educational applications development and
- e) to engage educational institution and XR applications developers, stakeholders, decision makers to utilize the XR2LEARN tools and make sustainable the XR2LEAR ecosystem.

XR2LEARN will organise **two** open calls (OCs) with different goals each time:

- The **1st Open Call** aims to ***extend the XR2LEARN scope and deliver novel XR-based applications primarily targeting the manufacturing domain***. It will open in June 2023 and run for 3 full months. Selected projects will start in January 2024 and run for 12 months.
- The **2nd Open Call** aims to ***perform test, piloting, evaluate and validate user acceptance of new or already developed XR-based applications***. It will open in October 2024 and run for 3 full months. Selected projects will start in April 2025 and run for 12 months.

This is the XR2LEARN Open Call #1 implementation. The total amount of funding that will be provided at Open Call#1 is **€2,100,000**. Each accepted sub-project may receive **€150,000 to €300,000** (100% funding as lump sum). As such, it is expected that **7 to 14 applications** will be selected via this open call to enter the process, extend XR2LEARN scope and deliver novel XR-based applications primarily targeting the **Industry 5.0 domain**.

The call targets industrial partners involved in XR development as well as XR application users and adopters. The call welcomes proposals from individual SMEs or small consortia consisting of up to three

partners. It is essential that the project coordinator is an SME with a specific focus on XR applications. Eligibility to participate in XR2LEARN extends to SMEs, mid-caps, research institutions, research organizations, and educational or training actors, including both private and public entities. These participants should be eligible for Horizon Europe calls, adhering to the program's criteria and guidelines.

Multiple entities can join a single proposal as members, except for the consortium's beneficiaries and any parties that may present a conflict of interest.

1.1 Background information on XR2LEARN project

The XR2LEARN project introduces innovative use of XR technologies in education and training and aims to

- bring all involved stakeholders into the **XR2LEARN community**
- render the XR2LEARN platform as a **unique entry point to XR for education applications**
- provide a holistic offering that encompasses both technical and business support services in order to attract the best-of-the-best SMEs, mid-caps, universities, academic institutions, and training organizations capable of developing novel XR applications
- organise activities to **push technologies** and ideas to the created XR/Educational community
- organise open calls to **engage audience, pull back results** and enable all actors to experience the **benefits of participating in this community**.

With respect to the provided technology, the XR2LEARN consortium is:

a) developing **three open-source XR-based applications**, “**PUSHing**” XR technologies to the target audiences. These applications will be showcased in dedicated workshops, capitalising on technologies already available through XR2LEARN partners to ensure a fast jump start. All three applications will be available to tailoring or for serving as basis for other application development by 3rd parties;

b) **communicating the value** of XR-based innovation and cultivate a better common understanding among **application developers, instructional designers and decision makers**

c) **creating a novel vision of XR** that is centred around the users and is aimed at providing them a learning/training experience that is **as “human as reality”**, as able to include users’ emotions in the experience

d) stimulating SMEs and educational/training organizations to develop **novel solutions exploiting XR technologies** i.e. **PULLing** smart solutions and to pilot novel XR-based solutions adopting the methodology suggested by XR2LEARN so that they gather meaningful feedback.



Figure 1: XR2LEARN concept and overall value chain for delivering innovative services to stakeholders

It is worth stressing that XR2LEARN platform will be populated with additional applications and best-practices which will come back to the platform as the result of the sub-projects that will be executed by third parties (Figure 1). The XR2Learn platform will operate as a Digital Innovation Hub that acts as a one-stop-shop for users interested in technological and business services as well as connecting with other users to exchange services and knowledge. For example, users delivering XR apps in the educational sector will be able to connect with instructional designers, decision makers and end-users with resources and competencies (e.g. business) required to create results with a product or market fit. XR2LEARN creates a win-win situation by fostering customer-business-market-oriented product development while also fulfilling the continuous needs for learning and training in knowledge societies.

1.2 XR2LEARN Open Call#1 Details

This is the implementation of the 1st Open Call of XR2LEARN project. The following details apply to the call:

- Each accepted sub-project may receive **between €150,000 and €300,000 funding**.
- **The total amount of funding that will be provided at this call is €2,100,000.** As such, it is expected that **7-14 applications** will be selected via this open call to enter the process, extend XR2LEARN scope and deliver novel XR-based applications primarily targeting the manufacturing domain.
- The Open Call is seeking applicant(s) **to propose the development of novel applications along with specifications that combine XR and educational use cases**. With respect to the targeted sectors, a **minimum of 70%** will be dedicated to XR-application relevant to industry 5.0 technologies and relevant skills and a **maximum of 30%** will be allocated to sub-projects targeting other educational sectors (e.g. healthcare and medical, manufacturing, construction and engineering).
- **An application may be submitted by an individual SME or a small consortium of up to 3 members in total.** The Project Leader/Coordinator must be an SME, while the inclusion in the consortium as a member of a potential user/early adopter (e.g. University, Academic or Training organization) may be a plus (although not mandatory), especially in the application specification and validation processes.
- In addition to presenting the technological concept and the use of **XR-technologies**, applicants are requested to provide **initial exploitation plans and business scenarios**, as these are important elements of the XR2Learn evaluation criteria.
- Delivery of **open-source versions of tools and/or applications will also be favoured**.
- The XR2Learn subprojects of this open call may have a total duration of **12 months**. The final delivered MVP should have a Technology Readiness Level (TRL) at least 6 (**TRL > 6**)¹, while Market Readiness Level (MRL) 3 or higher (**MLR ≥ 3**) is targeted².
- Each sub-project is organised in three (3) phases (DESIGN, DEVELOP and GROWTH) associated with relevant payments directly linked to deliverables as shown in the following figure.

¹ TRL 6 corresponds to technology demonstrated in relevant environment (industrially relevant environment in the case of key enabling technologies)

² MLR 3 indicates that stakeholders consider the application interesting

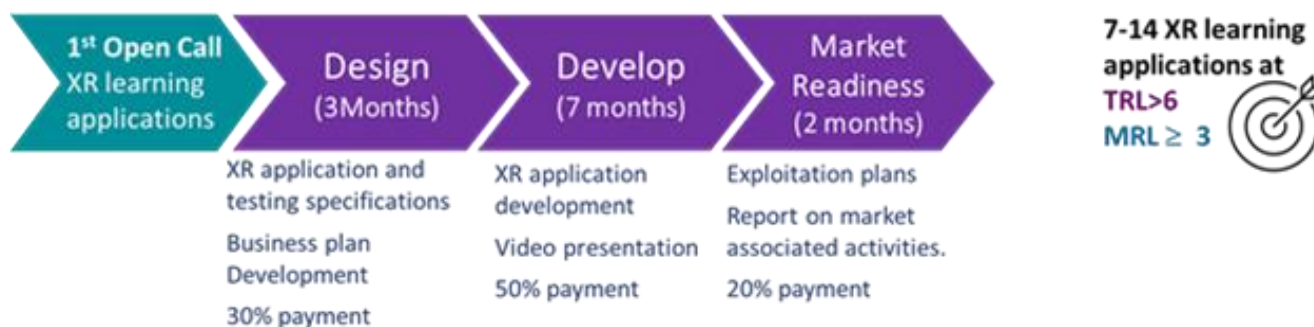





Figure 2: XR2LEARN Open Call#1 Phases

Sub-projects selected via Open Call #1 will run for 12 months (1/1/2024 – 30/12/2024) following a “DESIGN- DEVELOP- GROWTH” stages’ programme as shown in the next table.

Table 1. XR2LEARN Open Call #1 stages

Stage	Overview
DESIGN 	<ul style="list-style-type: none"> ● <i>Duration:</i> 3-months, the consortium will work remotely and occasionally participate in integration and testing activities. ● <i>Activities:</i> The consortium will fine-tune their application concept, prepare a detailed design deliverable (potentially including a mock-up or early prototype) and tech-business presentation. ● <i>Funding:</i> 30% (lump sum) per sub-project, associated to successful completion of the DESIGN phase, assessed by external reviewers.
DEVELOP 	<ul style="list-style-type: none"> ● <i>Duration:</i> 7 months, the consortium will work remotely and occasionally participate in integration and testing activities. ● <i>Activities:</i> The consortium will be developing the proposed XR tools or application, provide a MVP (Minimum Viable Product) and validate it. Delivery of open-source versions of tools and/or applications (under proper license) will also be favoured. ● <i>Funding:</i> Up to 80% (lump sum) per sub-project, associated to successful completion of the DEVELOP phase, assessed by external reviewers.
GROWTH 	<ul style="list-style-type: none"> ● <i>Duration:</i> 2 months, the consortium will participate in several meetings and events where they can promote their projects goals and outcomes. ● <i>Activities:</i> The consortium will realize activities associated with the promotion and exploitation of their project, aiming to engage new customers and/or partners and/or investors. ● <i>Funding:</i> Up to 100% (lump sum) per sub-project, associated to successful completion of the GROWTH phase, assessed by external reviewers.

This document provides a full set of information regarding the Open Call #1 for Proposals for the XR2LEARN project. Annex 1, Annex 3.1, Annex 4, Annex 5, Annex 6 and Annex 7 should also be considered for the submission of a Proposal.

1.3 General Funding Rules

The following rules apply to the project funding:

- Each accepted sub-project may receive funding between **€150,000** and **€300,000**.
- Each participating legal entity may receive funding between **€60,000** and **€200,000**.
- The total funding for all industrial partners should be at **least 60%** of the requested funding. Universities, academic, teaching or research organisations should request **up to 40%** of the total funding.
- All partners are funded at **100%**, through lump sum.

In total **€4,200,000** are available for the two Open Calls. The total funding to be distributed at Open Call #1 is **€2,100,000**; thus, the expected number of accepted projects will be between 7 and 14. In case, some funds remain unused from the Open Call #1, they will be transferred to Open Call #2. In case again there is a leftover, a hackathon will be organised to attract the interest of entrepreneurs/ innovators in the XR-technology sector.

1.4 Timeline – Open Call #1

Submission to the Open Call #1 will be enabled on Thursday, June 29th, 2023, and will end on **Friday September 29th, 2023, at 17:00CET time (Brussels time)**. Selected projects are expected to start on 1st of January 2024. Below are presented the dates for the different phases. The opening and closing dates for each phase can be subject to change in case of any modifications in the project's schedule.

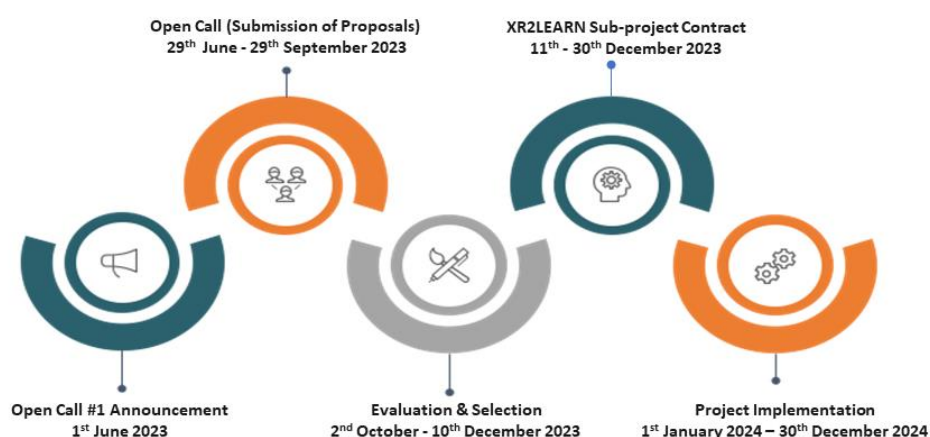


Figure 3: XR2LEARN Open Call #1 timeline

2 GENERAL INFORMATION

2.1 Means of submission

The F6S platform (<https://www.f6s.com/xr2learn/>) will be the entry point for all proposals' submissions to XR2LEARN Open Calls. Submissions received by any other channel will be automatically discarded. Documents required in subsequent phases will be submitted via dedicated channels, which will be indicated by the XR2LEARN consortium during the sub-granted projects execution.

2.2 Language

English is the official language for the XR2LEARN open calls. Submissions done in any other language will not be evaluated. English is also the only official language during the whole execution of the XR2LEARN programme. This means any requested submission of deliverables must be done in English to be eligible.

2.3 Documentation formats

Any document must be submitted electronically in PDF format without restrictions for printing.

2.4 Data protection

In order to process and evaluate applications, XR2LEARN will need to collect Personal and Industrial Data. F6S will act as Data Controller for data submitted through the F6S platform for these purposes. The F6S platform's system design and operational procedures ensure that data is managed in compliance with The General Data Protection Regulation (EU) 2016/679 (GDPR). Each applicant will accept the F6S terms to ensure coverage. Please refer to <https://www.f6s.com/terms> to check F6S platform data privacy policy and security measures.

Please also note that XR2LEARN requests the minimum information needed to deliver the evaluation procedures or introduce the new partners to the consortium. For example, **Annex 7: Bank account information** is provided just for reference and will only be requested if the applicant is accepted in the XR2LEARN consortium.

2.5 Origin of the funds

Any proposer chosen to participate in XR2LEARN will be associated with the consortium through a sub-project contract. This contract will outline the specific terms and conditions of their involvement in the project. In addition, by signing the XR2LEARN Consortium Agreement, the selected proposer will gain access to the benefits and adhere to the rules set forth by XR2LEARN.

The funds allocated to the selected applicants originate from the European Project XR2LEARN, which is funded under the EC Horizon Europe Framework Programme (HORIZON). These funds are the property of the European Union until the payment of the balance, and their management rights have been transferred to the project partners within XR2LEARN through the European Commission Grant Agreement Number 101092851.

The relationship between the new partners and the EC carries a set of obligations³

³ More information at https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/horizon/guidance/programme-guide_horizon_en.pdf

3 PROPOSAL ELIGIBILITY CRITERIA

XR2LEARN invites individual SMEs or small consortia of up to 3 partners active in XR applications development to implement innovative XR applications that offer new services and validate the XR2LEARN components in the educational domain.

3.1 SME Definition

An SME will be considered as such if they are compliant with the European Commission Recommendation 2003/361/EC [1] and the SME user guide [2]. As a summary, the criteria which define an SME are:

- a. Independent (not linked or owned by another enterprise), in accordance to Recommendation 2003/361/EC.
- b. Headcount in Annual Work Unit (AWU) less than 250.
- c. Annual turnover less or equal to €50 million OR annual balance sheet total less or equal to €43 million.

3.2 SME Eligibility Criteria

An SME applicant is considered eligible if it complies with ALL the following rules:

- i. It is a legal entity, that comply to the SME definition as defined in section 3.1⁴
- ii. It is established and based in one of the EU Member States or a Horizon Associated country as defined in Horizon Rules for participation [3]
- iii. It is an IT technology provider, such as XR tools, XR applications and services.
- iv. Applicants should be able to prove their financial stability and capacity and pass any financial check required by the European Commission, including a **Financial capacity assessment** [4]. Moreover, the SMEs should take into consideration that all funds are directly associated with the XR2LEARN project funding and any funding issue, including delays, in the XR2LEARN project financing is directly applied to the selected Open Call applicants/ sub-contracts.
- v. In case an SME is awarded a sub-contract, they will remain eligible even if, at a certain point during the project execution, it does not fulfil criteria (b) or (c) of section 3.1.
- vi. Have not been convicted for fraudulent behaviours, other financial irregularities, unethical or illegal business practices.
- vii. Are not under liquidation or an enterprise under difficulty accordingly to the Commission Regulation No 651/2014 art. 2.18.

⁴ In case you are not sure if the legal entity that you represent in an SME, run the EC self-evaluation test <https://ec.europa.eu/growth/tools-databases/SME-Wizard/>

3.3 Proposal specific Eligibility Criteria

The following proposal's eligibility criteria also apply:

- i. Proposals must offer technological developments such as **XR tools and applications targeting educational scenarios**.
- ii. Proposals must have a **clear European dimension** and contribute towards EU digitization, **targeting clear economic and societal impact**.
- iii. The application must be submitted either by an **individual SME or by a small consortium of up to 3 members. The project Leader/Coordinator must be an SME**. Inclusion in the consortium as a member of a potential user/ early adopter (e.g. University, Academic or Training organization) may be a plus (although not mandatory).
- iv. The requested funding per proposal should be between **€150,000 and €300,000**. Each participant legal entity may receive between **€60,000 and €200,000**. All partners are funded at **100% (lump sum)**. The total funding for the industrial partners should be at least **60%** of the requested funding, while academic, teaching or research organisations request up to **40%** of the total funding.
- v. **Each legal entity may participate in only one (1) proposal at each XR2LEARN open call**. If a legal entity participates, in any direct or indirect way in multiple submissions, all associated proposals are automatically disqualified and will be automatically excluded from the evaluation process.
- vi. **It is considered as Conflict of Interest and the relevant proposals will be automatically considered not eligible, in case an individual participates, controls, submits or is associated in any way with more than one proposal**. As indicative example, without excluding other cases, it is not allowed for an individual to be in the project team or the advisory board of more than one proposal. Moreover, it is not allowed for an individual to have a legal, administrative, technical, advisory or financial position or capacity in more than one applicant or is in the position to access or influence in any way more than one proposal.
- vii. **Any legal entity may participate in maximum one (1) accepted application**. Applicants that will be accepted via Open Call #1 are automatically excluded from participating in Open Call #2 even if they submit a different proposal and the proposal will be automatically rejected.

Please note that signed version of **Annex 4: Consortium Declaration** and **Annex 5: Declaration of Honour** are mandatory for all consortium partners and signed version of **Annex 6: SME Financial Stability Declaration** is mandatory for all SMEs participating in a proposal at submission time.

4 Open Call submission and selection process

XR2LEARN Open Call #1 targets XR application developers to build applications based on XR2LEARN project developments. The following figure summarizes the open call process:

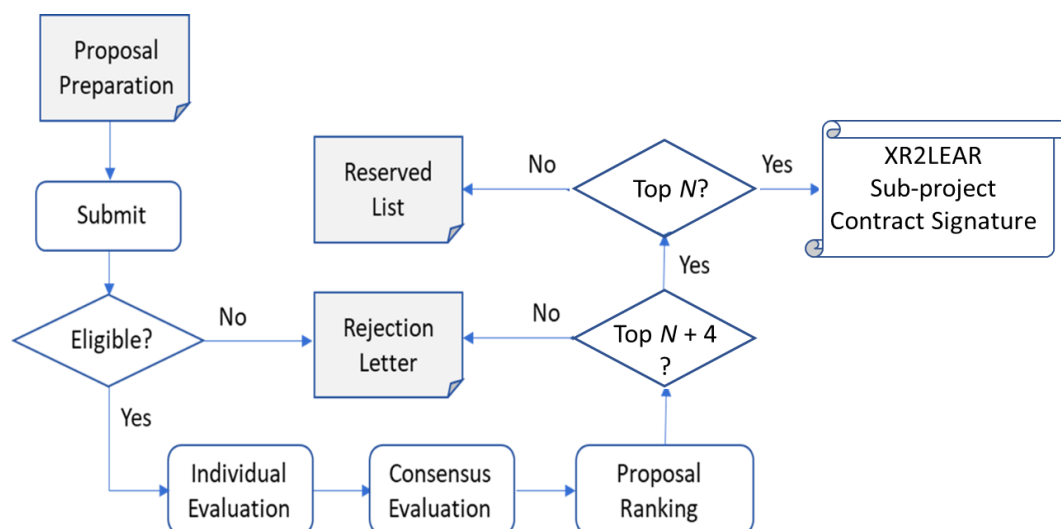


Figure 4: XR2LEARN Evaluation process summary

Each proposal will go via an eligibility checking and in case it is eligible, it will go via the evaluation process described in the section 4.2 4.2.2 below. Based on the evaluation criteria defined in section 4.2.2, the proposals will be ranked and then the top N proposals that the sum of their requested funding is lower than the available budget will be selected. We expect N to be a number between 7 and 14. The contract signature process will be initiated for these N proposals. Four (4) additional proposals that have ranked just below the selected N , will be kept at the reservation list in case one of the top N proposals fail during the sub-contract preparation phase.

Open Call Submission

The Open Call submission will follow the steps that are listed in this section:

4.1.1 Open Call publication

The Open Call #1 will be published on the dates shown in section §4.1.4. It will be supported by:

- **Annex 1: Open Call text**, which provides a full set of information regarding the Open Call for Proposals for the XR2LEARN project.
- **Annex 2: Guidelines for Applicants**, this document.
- **Annex 3: Proposal Template**, an online application form, available at F6S platform (<https://www.f6s.com/xr2learn-open-call-1>).
- **Annex 3.1: Proposal Supplement Template**, a word document to be completed and submitted together with the proposal. It includes information on proposal concept, schedule, applicant/team, Ethical & Security details.
- **Annex 4: Consortium Declaration**, which declares that all consortium members commit to the proposal submission, the consortium coordinator and funding distribution.
- **Annex 5: Honour Declaration**, which declares that all conditions of the Open Call are accepted by all legal representatives. At the end, a single file in pdf format should be submitted. Pages 2 & 3 should be replicated, completed and signed by the legal representative of each consortium member.

- **Annex 6: SME Financial Stability Declaration**, which evaluates the status of the coordinating SME and any other SME in the consortium and their financial stability. At the end, a single file in pdf format should be submitted, while pages 2 to 10 should be replicated, completed and signed by the legal representative of each SME which is a consortium member.
- **Annex 7: Bank account information**, which collects information on the consortium coordinator bank account where the XR2LEARN payments will be sent to (for reference at submission time).
- **Annex 8: Frequently Asked Questions & Answers**, a document with Q&A.
- **Annex 9: Open Call Beneficiary Agreement Template**, provided for reference at submission time.

4.1.2 Applicants Registration

Interested applicants should register at the XR2LEARN F6S page (<https://www.f6s.com/xr2learn-open-call-1/apply>). This will be the central interface for managing the proposal applications for the remainder of the open calls.

4.1.3 Proposal Preparation

Please follow the steps:

1. For the proposal preparation, the applicants are requested to apply online and answer to all mandatory questions (with no exception) at <https://www.f6s.com/xr2learn-open-call-1/apply>.
2. If an individual SME applicant or any applicant of a consortium does not accept the terms and conditions of the Open Call or does not sign and upload to the f6s Open Call portal the correctly completed **Annex 4: Consortium Declaration** and **Annex 5: Honour Declaration** documents covering all proposal applicants or a proposal has not correctly completed, signed and uploaded to f6s Open Call portal the **Annex 6: SME Financial Stability** declaration, covering all SMEs applicants of the proposal, the complete proposal will not be eligible.
3. When writing the proposal and completing the **XR2Learn Annex 3.1 Open Call Proposal Supplement** they need to be concrete and concise. Questions have character/page limitation. Please read carefully all open call documents/Annexes (<https://xr2learn.eu/open-call-1/>).
4. It is highly recommended to submit your proposal well before the deadline. If the applicant discovers an error in the proposal, and provided that the call deadline has not passed, the applicant may request its proposal to be withdrawn so that they may re-submit it (for this purpose please contact us at opencalls@xr2learn.eu . However, XR2LEARN consortium is not committed that the submitted proposal will be withdrawn in time in case the request for resubmission is not received by the XR2LEARN team at least 48 hours before the call deadline.

It is strongly recommended not to wait until the last minute to submit the proposal. Failure of the proposal to arrive in time for any reason, including network communications delays is not acceptable as an extenuating circumstance. The time of proposal receipt as recorded by the submission system will be definitive and the F6S platform will lock automatically, even if you are in a different time zone.

4.1.4 Proposals reception

Submissions will be done ONLY via the F6S platform on <https://www.f6s.com/xr2learn-open-call-1/apply>. A full list of proposers will be drafted containing their basic information for statistical purposes and clarity (which will be also shared with EC for transparency).

The application reception will close at **17:00 CET (Brussels time) on Friday September 29th, 2023**. There will not be any deadline extensions unless a major problem caused by the submission platform (and not by the proposers), makes the system unavailable.

4.2 Evaluation Procedures

4.2.1 Step 1.1: Eligibility

An automatic filtering to discard non-eligible proposals will follow the short list. The eligibility criteria check will verify that:

- The proposing entity is a legal entity eligible for EC funding under the rules of Horizon Europe [Y/N]
- The participation rules as expressed in **§3.3 "SME Eligibility Criteria"** are followed for all industrial partners of the consortium [Y/N]
- The participation rules as expressed in **§3.3 "Proposal specific Eligibility Criteria"** are followed [Y/N]
- The proposal and all associated documents are written in the English Language [Y/N]
- All required annexes i.e. **Annex 3.1, Annex 4, Annex 5** and **Annex 6** are correctly completed, signed, stamped and submitted [Y/N]

Proposals being marked as non-eligible will get a rejection letter including the reasons (a to e) for being catalogued as non-eligible. No further feedback on the process will be given.

4.2.2 Step 1.2: External remote evaluation

Two (2) evaluators external to XR2LEARN consortium with experience in XR technologies, education and business development will evaluate each proposal, scoring it based on the following evaluation criteria:

Table 2: XR2LEARN Open Call #1 applications evaluation Criteria

Criteria	Description
Criterion 1: Concept and Innovation	<ul style="list-style-type: none"> Innovation, novelty and feasibility of the proposed subsystem objectives. Design, reliability, feasibility, and quality of the proposed subsystem. Level of innovation and technological challenges addressed. Applicability to the XR and education scenarios. Applicability to Industry 5.0 technologies domain.
Criterion 2: Technology	<ul style="list-style-type: none"> Analysis of the technological and implementation capacity (existing and target TRL and MRL). Quality and feasibility of the workplan (including proposed milestones). Quality of the alignment with the XR2LEARN project. Details on how the proposed components will be tested and validated.
Criterion 3: Impact	<ul style="list-style-type: none"> Economic and societal impact of the proposed subsystem. Market potential and go to market strategy. European dimension, cross-sector/-border business scalability. Exploitation/business plan and commercialization milestones. Offering the application as open source or not.
Criterion 4: Applicant Entity/Team	<ul style="list-style-type: none"> Capacity to applicant entity/team to perform the task. Knowledge, technological and business expertise. Financial viability/stability and capacity. Commitment of the company and the team. Allocation and justification of requested resources.

Each criterion will get a mark between 1 and 10. Half point scores are not given. For each criterion under examination, score values will indicate the following assessments:

- **1-2: Fail.** The proposal fails to address the criterion under examination or cannot be judged due to missing or incomplete information.
- **3-4: Very poor.** The criterion is addressed in an unsatisfactory manner.
- **5: Poor.** There are serious inherent weaknesses.
- **6-7: Good.** While the proposal broadly addresses the criterion, there are significant weaknesses that would need correcting.
- **8-9: Very Good.** The proposal addresses the criterion well, although certain improvements are possible.
- **10: Excellent.** The proposal successfully addresses all relevant aspects of the criterion in question. Any shortcomings are minor.

The threshold for each criterion will be **six (6)**, while the overall score threshold will be **twenty-six (26)**. It means that **if a proposal receives less than 6 in one criterion or less than 26 overall score it is automatically rejected.**

Each evaluator will record his/her individual evaluation/opinion of each proposal on an Individual Evaluation Report. After individual evaluation, the experts will communicate to prepare a single consensus Evaluation Summary Report (ESR) for each proposal, representing opinions and scores on which the evaluators agree and which they will sign.

4.2.3 Step 1.3: Ranking and Selection Procedure

Within Open Call#1 there is an available funding of €2.100.000 in total to fund projects that apply XR technologies to educational scenarios. A minimum of 70% of the above budget (€1.470.000) will be granted to projects relevant to industry 5.0 technologies⁵. The selection of the projects to be funded will be based on the following procedure:

- **Step 1.3.1:** The projects dedicated to XR-applications relevant to industry 5.0 technologies will be ranked in a dedicated list following the rules that are described below in this section.
- **Step 1.3.2:** From the above list, the top projects in ranked order will be selected having a total requested funding of up to €1.470.000. In case, the total requested funding of the selected projects is below €1.470.000, one additional project will be selected.
- **Step 1.3.3:** All remaining projects will be ranked again in a single list following the rules that are described below in this section.
- **Step 1.3.4:** From the new list, the top projects in ranked order will be selected so that the total requested funding from all Open Call#1 projects (the ones selected in Step 1.3.2 plus the ones selected in this step) to be up to €2.100.000. In case the total requested funding of the selected projects is below €2.100.000, the remaining funding will be transferred to Open Call #2.

The criteria for the ranking of the proposals will be semi-automatic following the rules below:

- **Rule 1:** The proposals will be ranked based on their overall score (sum of criterion 1 to 4 scores).
- **Rule 2:** In case following Rule 1 there are proposals in the same position, priority will be given to innovation of the concept (Evaluation Criterion 1).
- **Rule 3:** In case following Rule 2 there are proposals in the same position, priority will be given to proposals with better technological and implementation capacity (Evaluation Criterion 2).

⁵ The XR2LEARN consortium reserves the right to modify the above 70% rate anytime in the selection process, given exceptional conditions. As an example, in case the number of the projects relevant to industry 5.0 technologies that are evaluated above the evaluation threshold are not sufficient to cover the above funding percentage.

- **Rule 4:** In case following Rule 3 there are proposals in the same position, priority will be given to proposals that have higher impact and market potential (Evaluation Criterion 3).
- **Rule 5:** In case following Rule 4 there are proposals in the same position, priority will be given to the application that has lower funding request.
- **Rule 6:** In case following Rule 5 there are proposals in the same position, priority will be given to the number of female researchers participating in the project team.
- **Rule 7:** In case following Rule 6 there are proposals in the same position, priority will be given to the application that increases XR2LEARN project footprint in Europe.

In case following Rule 7 there are still proposals in the same position, which are in the top ranked proposals and may get funding, the XR2LEARN consortium will invite at least 1 additional evaluator to read the specific proposals and break the conflict by re-evaluating them.

At the end, and based on the requested funding, at least 7 to 14 proposals will be selected, while four (4) additional proposals will remain in a reserve list. In case one of more selected proposals fail during contract preparation, the list of accepted proposals will be filled with proposals from the reserve list.

All proposals will receive an acceptance or rejection letter together with an anonymized version of their proposal Consensus Evaluation Report.

4.2.4 Step 1.4: Contract Preparation & Signature

After the Open Call evaluation conclusion and projects selection, the XR2LEARN coordinator will inform the EU of the results and start the sub-project contract preparation in collaboration with the applicants that have been evaluated in the short list. Contract preparation will go via administrative and financial checking (and potentially into technical or ethical/ security negotiations) based on evaluators' comments. On a case-by-case approach, at least one phone call or teleconference between the XR2LEARN coordinator and the sub-project coordinator may be needed for clarification.

The objective of the contract preparation is fulfilling the legal requirements between the European Commission, the XR2LEARN consortium and every beneficiary/consortium member of the selected sub-project. The items covered will be:

- To address the comments (if any) in the Evaluation Summary Report of the proposals, especially potential Ethical issues.
- To validate the status information, at least the following documents will be required for all applicants/consortium members of each sub-project:
 - **Legal existence of all applicants.** Company Register, Official Gazette or other official document per country showing the name of the organisation, the legal address, the official founding date, ownership and a copy of a document proving VAT registration (in case the VAT number does not show on the registration extract or its equivalent).
 - **Financial Stability of all SMEs.** It includes the headcount (AWU), balance, profit & loss accounts of the latest closed financial year and the relation, upstream and downstream, of any linked or partner company. In the event an applicant declares being non-autonomous, the balance sheet and profit and loss account (with annexes) for the last period for upstream and downstream organizations should also be provided.
 - In cases where the **number of employees and/or the ownership of an SME is not clearly identified:** any other supporting documents which demonstrate headcount and ownership such as payroll details, annual reports, national regional association records, etc.
- **To provide the sub-project coordinator Bank account information:** The account where the funds will be transferred will be indicated via a form signed by the Applicant legal representative and the bank representative. The account should be a business bank account of the applicant company.

It should be emphasised that each **SME should provide at contract preparation time a valid VAT⁶. Failure to provide the VAT number will automatically result in proposal rejection.**

In general, the contract preparation (including all the above documentation) should be concluded within 2 weeks. One additional week may be provided by the XR2LEARN coordinator in case of a significant reasoning. In case negotiations have not been concluded within the above period, the proposal is automatically rejected and the next proposal in the reserve list is invited.

The provided funding remains property of the European Commission until the payment of the balance, whose management rights have been transferred to the project partners in XR2LEARN via European Commission Grant Agreement Number 101092851.

4.2.5 Redress process

Within 3 working days of the delivery of a rejection letter considering the proposal as non-eligible or an ESR, a proposal coordinator may submit a request for redress if s/he believes that the results of the eligibility checks have not been correctly applied, or if s/he feels that there has been a shortcoming in the way his/her proposal has been evaluated that may affect the final decision on whether to enter the XR2LEARN Consortium or not.

In that case, an internal review committee of the XR2LEARN consortium will examine the request for redress. The committee's role is to ensure a coherent interpretation of such requests, and equal treatment of applicants.

Requests must be:

- Related to the evaluation process or eligibility checks.
- Clearly describe the complaint.
- Received within the time limit (3 working days) from the reception of a rejection letter considering the proposal as non-eligible or the ESR information letter delivered.
- Sent by the applicant coordinator legal representative that has also submitted the proposal.

The committee will review the complaint and will recommend an appropriate course of action. If there is clear evidence of a shortcoming that could affect the eventual funding decision, it is possible that all or part of the proposal will be re-evaluated.

Please note:

- This procedure is concerned only with the evaluation and/or eligibility checking process. The committee will not call into question the scientific, technical or impact judgment of appropriately qualified experts.
- A re-evaluation will only be carried out if there is evidence of a shortcoming that affects the final decision on whether to grant a sub-project to the application consortium or not. This means, for example, that a problem relating to one evaluation criterion will not lead to a re-evaluation if a proposal has failed anyway on other criteria.
- The evaluation score following any re-evaluation will be regarded as definitive. It may be lower than the original score.

Only one request for redress per proposal will be considered by the committee. All requests for redress will be treated in confidence and must be sent to Project Coordinator via the F6S platform.

⁶ To be checked at EC services such as http://ec.europa.eu/taxation_customs/vies/

5 Sub-projects Execution, Reviews & Financial Planning

The progress of the project execution and the deliverables' quality will be reviewed by external experts in sub-project month 3 (completion of DESIGN phase), month 10 (completion of DEVELOP phase), and month 12 (completion of GROWTH phase) as shown in Figure 3. Projects successfully passing each review will receive the relevant funding, given that the European Commission has released the relevant funding to XR2LEARN coordinator.

Table 3: XR2LEARN Open Call #1 Reviews schedule

Phase	Duration (months)	Scheduled Review	Funding %	Condition / Event
DESIGN	3	March 2024	30%	Successful completion of the sub-project DESIGN phase and acceptance of relevant deliverable D1
DEVELOP	7	October 2024	Up to 80%	Successful completion of the sub-project DEVELOP phase and acceptance of relevant deliverables D2, D3 and D4
GROWTH	2	December 2025	Up to 100%	Successful completion of the sub-project GROWTH phase and acceptance of relevant deliverable D5

*It should be noticed that:

- All payments are to be made promptly after the coordinator receives the sum? from the EC. Especially the last payment may be made after EC has made the final XR2LEARN payment.
- The Coordinator is entitled to withhold any payments due to a Defaulting Party except for the amount of contribution that the Funding Authority, after acceptance of reporting, decides to be provided to the Defaulting Party.

5.1 DESIGN phase project execution

After the proposal has been accepted and the sub-grant agreement has been signed, the applicant(s) will enter the DESIGN phase. The DESIGN phase will last three (3) months.

During this phase, the sub-project should clarify the details of the application, including both the technical and the business parameters, provide a detailed application design along with the potential economic/business impact in the XR2LEARN related domains and the European dimension/scale.

At least 5 working days before the end of the DESIGN phase the sub-project coordinator should provide a deliverable entitled: **D1 "Detailed XR Tools- Application Design"** with the following chapters:

- Motivation and technological background of the proposed XR Application
- XR Application to Educational scenarios
- Detailed design of the proposed XR Application
- Economic/business impact potential

5.1.1 Review of the DESIGN phase

At the end of the sub-project's month M3, the Open Call #1 subprojects will be remotely evaluated using a teleconference platform (e.g. Zoom, WebEx or Teams) by external experts to determine a) if the DESIGN phase is completed successfully and b) if the subproject is ready to enter the DEVELOP phase.

In case a sub-project consortium has not submitted the D1: “Detailed XR Tools - Application Design” deliverable on time, the DESIGN phase review will be cancelled, the DESIGN phase will be considered unsuccessful, and the sub-project will be automatically terminated.

The review committee will consist of:

- Two Independent Experts external to XR2LEARN consortium
- One XR2LEARN consortium member acting as moderator

During the meeting, the sub-project will provide a PowerPoint presentation or a similar tool format and make a presentation of the sub-project idea/concept focusing on the technological dimension and the implementation/experiment workplan and answer to questions of the evaluation team. Moreover, they may provide a mock-up or an early prototype of the proposed XR application.

Each sub-project should be well prepared for the meeting. Though not binding at this point, it is expected that the review will last 30-45 minutes. The evaluation team may extend the technical evaluation if they consider that it is necessary.

At the end of the review process, each external expert will evaluate each sub-project and a common **Review Report** per sub-project will be prepared. **In case of a positive review report and acceptance of the D1 deliverable, the DESIGN phase will be considered successful.**

In case, the review process is not successful and/or the deliverable D1 is not accepted by the external experts, the sub-project consortium will have one (1) additional month to update the deliverable D1 and re-submit it. A video of up to 5 minutes may optionally accompany the D1 deliverable resubmission. The resubmitted deliverable (and the video if any) will be reviewed again off-line by the same external experts.

In case the resubmitted deliverable D1 is accepted, a new Review Report will be prepared, and the sub-project DESIGN phase will be considered successful. In case the resubmitted deliverable D1 is not accepted, the DESIGN phase will be considered unsuccessful, and the sub-project will be automatically terminated.

5.1.2 DESIGN Phase Compensation

After the DESIGN phase review, the sub-projects that have successfully completed the DESIGN phase will be requested to send to the XR2LEARN coordinator **within 5 working days** a financial statement F1 (template will be provided) requesting a voucher equal to the 30% of the sub-project total requested funding.

The XR2LEARN coordinator after receiving the above document will proceed with the payment of the DESIGN phase voucher (provided in a lump sum mode). Though not binding, the voucher will be released within **15 days** after receiving the financial statement. The sub-project coordinator will be responsible for proportionally distributing the funding to the sub-project consortium.

In case a sub-project has not successfully completed the DESIGN phase, their sub-grantee contract will be automatically terminated, and no DESIGN phase compensation will be provided.

5.2 DEVELOP phase project execution

After the DESIGN phase successful completion, the sub-projects will enter the DEVELOP phase, which is the MVP implementation sub-phase. The duration of this phase will be 7 months, covering project months M4 (April 2024) to M10 (October 2024).

During this phase, the subproject consortium should develop their XR2LEARN MVP XR-application prototype which should reach a readiness level of at TRL > 6 and MRL ≥ 3.

At least one week before the scheduled deadline, the sub-project coordinator should submit the following deliverables:

Table 4: XR2LEARN Open Call #1 DEVELOP Phase deliverables

Deliverable ID	Title	Description	Schedule (Month)
D2	XR Tools/ Application MVP Documentation	A detailed deliverable analysing the sub-project XR tools and application, the implementation approach and provided functionality. The deliverable should include a detailed analysis and screenshots of the SW (tools or application). In case the sub-project is committed to provide the XR tools/application as open source (under proposer license), it should be provided as an attachment to this deliverable, uploaded to a public repository (i.e. GitHub).	M9
D3	Test and Validation	A report describing the system prototype testing and validation approach, along with the results of the validation. This deliverable will also include a section describing the impact potential, the exploitation plan, and the business considerations.	M10
D4	Project Video	A video with a duration of 5-10 minute describing the SME, the IoT application and the results. This video will be published at the XR2LEARN web site.	M10

5.2.1 Review of the DEVELOP phase

At the end of the sub-project's month M10, the Open Call #1 subprojects will be remotely evaluated using a teleconference platform (e.g. Zoom, WebEx or Teams) by external experts to determine a) if the DEVELOP phase is completed successfully and b) if the subproject is ready to enter the GROWTH phase.

In case a sub-project consortium has not submitted the deliverables D2, D3 and D4 on time, the DEVELOP phase review will be cancelled, the DEVELOP phase will be considered unsuccessful, and the sub-project will be automatically terminated.

The review committee will consist of:

- Two Independent Experts external to XR2LEARN consortium.
- One XR2LEARN consortium member acting as moderator.
- Any XR2LEARN consortium member or EU official may participate as audience.

Though not binding at this point, the DEVELOP review is expected to last for one (1) hour per sub-project. The sub-project consortium will make a short presentation of the sub-project (10-15 minutes) and a detailed demonstration of the tools /application (25-30 minutes), keeping 15-20 minutes for questions and answers. The evaluation team may extend the technical evaluation if they consider that it is necessary.

At the end of the review process, each external expert will evaluate each sub-project and a common **Review Report** per sub-project will be prepared. **In case of a positive review report and acceptance of all deliverables, the DEVELOP phase will be considered successful.**

In case, the review process is not successful and/or one of the deliverables is not accepted by the external experts, the sub-project consortium will have one (1) additional month to update the rejected deliverable(s) and re-submit it/them. The resubmitted deliverable(s) will be reviewed again off-line by the same external experts.

In case all deliverables are accepted, a new Review Report will be prepared, and the sub-project DEVELOP phase will be considered successful. In case one or more deliverables are not accepted again, the DEVELOP phase will be considered unsuccessful. If deliverable D2 is not accepted, the sub-project will be automatically terminated. If deliverables D3 and/or D4 are not accepted, the sub-project will continue in GROWTH phase, but rejected deliverables will not be compensated and will be re-evaluated at the final project review.

5.2.2 DEVELOP Phase Compensation

Just after the DEVELOP review report has been received, the sub-projects that have successfully completed DEVELOP phase will be requested to send to the XR2LEARN coordinator **within 5 working days** a financial statement F2 (template will be provided) requesting a voucher up to the 50% of the sub-project total requested funding (thus together with F1 financial statement will request up the 80% of the sub-project funding).

In case, deliverable D2 has not been accepted, the sub-project will be terminated, and the sub-project will NOT receive any compensation for the DEVELOP phase. In case D3 and/or D4 deliverables have been rejected, the rejected deliverables will not be compensated at this phase and F2 financial statement will be reduced accordingly.

The XR2LEARN coordinator after receiving the F2 financial statement will proceed with the payment of the DEVELOP phase voucher (provided in a lump sum mode). Though not binding, the voucher will be released within **15 days** after receiving the financial statement. The sub-project coordinator will be responsible for proportionally distributing the funding to the sub-project consortium.

5.3 GROWTH phase project execution

After the DEVELOP phase completion, the sub-projects will enter the GROWTH phase. The duration of this phase will be 2 months, covering project months M11 (November 2024) to M12 (December 2024).

During this phase, the subproject consortium should participate in various events, have f2f meetings with potential investors and finalize their business and market plans. **In case, a virtual or physical participation of the sub-project and demonstration of the XR tools/applications at an XR2LEARN event (i.e. project meeting, workshop, review) is requested, it will have a mandatory nature and failure to participate will result in automatic sub-project termination.** In case physical participation/demonstration is requested, the invitation to the sub-project coordinator should be submitted at least 2 weeks prior to the event.

One week before the end of the GROWTH phase, the sub-project coordinator should submit the deliverable **D5: Exploitation & Sustainability**, a report describing the dissemination, exploitation and commercialization activities and the sustainability potential. At this time, the sub-project should also re-submit deliverables D3 and/or D4 in case they have not been accepted during the DEVELOP phase review.

In case, the deliverable D5 (and potentially D3 and/or D4) will not be submitted on time, the sub-project will not be allowed to participate at the GROWTH review process.

5.3.1 Review of the GROWTH phase

At the end of the sub-project (M12), the Open Call #1 subprojects will be reviewed, remotely or physically, by external experts to determine if the GROWTH phase is completed successfully.

In case a sub-project consortium has not submitted on time the deliverable D5 (and potentially any D3 and/or D4 resubmission), the GROWTH phase review will be cancelled, the GROWTH phase will be considered that was completed unsuccessfully, and the sub-project will be automatically terminated.

The review committee will consist of:

- Two Independent Experts external to XR2LEARN consortium.
- One XR2LEARN consortium member acting as moderator.
- Any XR2LEARN consortium member, EU official or public in general may participate as audience.

Though not binding at this point, the GROWTH review is expected to last for 30-60 minutes per sub-project based on the selection of a virtual or physical review and the composition of the audience. The sub-project consortium will make a short presentation of the sub-project (10-15 minutes), keeping 10-15 minutes for questions and answers. In case of a physical review or participation of external audience, a detailed demonstration of the XR tools/application, either during the review session or in a separate session may

be requested. The evaluation team may extend the technical evaluation if they consider that it is necessary.

At the end of the review process, each external expert will evaluate each sub-project and a common **Review Report** per sub-project will be prepared. **In case of a positive review report and acceptance of all deliverables, the GROWTH phase will be considered that was completed successfully. In case, the review process is not successful and/or deliverable D5 or any resubmission of D3 and/or D4 is/are not accepted by the external experts, the decision will be definite, and the sub-project consortium will not be compensated for these deliverables.**

5.3.2 GROWTH Phase Compensation

Just after the GROWTH review report has been received, the sub-projects that have successfully completed the GROWTH phase will be requested to send to the XR2LEARN coordinator **within 5 working days** a financial statement F3 (template will be provided) requesting a voucher equal to the remaining of the sub-project total requested funding (thus together with F1 and F2 financial statement will request up to the 100% of the sub-project funding).

In case no deliverable has been accepted, the rejected deliverables will not be compensated and F3 financial statement will be reduced accordingly.

The XR2LEARN coordinator after receiving the F3 financial statement will proceed with the payment of the DEVELOP phase voucher (provided in a lump sum mode). Though not binding, the voucher will be released within **15 days** after receiving the financial statement. The sub-project coordinator will be responsible for proportionally distributing the funding to the sub-project consortium.

5.4 Summary of deliverables and relevant funding

Please find a summary of the deliverables expected by each sub-project phase and the associated funding per deliverable in the following table:

Table 5: XR2LEARN Open Call #1 deliverables

Deliverable ID	Title	Sub-project Phase	Schedule (Month)	Associated Funding %
D1	Detailed XR Tools- Application Design	DESIGN	M3	30%
D2	XR Tools/ Application MVP Documentation	DEVELOP	M9	30%
D3	Test and Validation	DEVELOP	M10	15%
D4	Project Video	DEVELOP	M10	5%
D5	Exploitation & Sustainability	GROWTH	M12	20%

6 RESPONSIBILITIES OF BENEFICIARIES

The selected consortia become beneficiaries of European Commission HORIZON framework funding. As such, they are responsible for the proper use of the funding and comply with obligations under Horizon Europe specific requirements as described in Horizon Europe Model Grant Agreement [5]. The obligations that are applicable to the recipients include⁷:

6.1 Participation to the XR2LEARN project

A non-exhaustive list of benefits and responsibilities include:

- The applications and consortium applicants selected from the Open Call will be communicated to the European Commission and listed at the XR2LEARN web site.
- All new XR2LEARN Applications and components will be offered as Open Source (if applicable).
- Sub-project participants may be invited in XR2LEARN activities, including consortium/WP meetings and phone calls, pilot and dissemination activities, reviews from the EC. Participation at least to one event/ review during the GROWTH phase review may have a mandatory nature.

6.2 Conflict of Interest

The sub-project consortium applicant(s) must take all measures to prevent any situation where the impartial and objective implementation of the proposed tasks are compromised for reasons involving economic interest, political or national affinity, family, or emotional ties or any other shared interest ('conflict of interests').

They must formally notify the XR2LEARN coordinator without delay about any situation constituting or likely to lead to a conflict of interests and immediately take all the necessary steps to rectify this situation. The XR2LEARN coordinator may verify that the measures taken are appropriate and may require additional measures to be taken by a specified deadline.

6.3 Data Protection & Confidentiality

During the implementation of the action and for five years after the end of the XR2LEARN project, the parties must keep confidential any data, documents or other material (in any form) that is identified as confidential at sub-project subcontract signing time ('confidential information').

Additional rules for data protection & confidentiality as part of the XR2LEARN consortium agreement may apply. It should be noticed that all tools/software/applications implemented within the XR2LEARN project as open source will be covered by the relevant Open-Source License. During the sub-project signature, the sub-project consortium beneficiaries may describe in a specific Annex any background knowledge or asset that they are willing to remain as background knowledge.

6.4 Give visibility to the EU funding

The sub-project consortium must promote the participation in the XR2LEARN project and its results, by providing targeted information to multiple audiences (including the media and the public) in a strategic and effective manner and to highlight the financial support of the EC.

⁷ The obligations described here are not binding and may be modified, refined or additional obligations may be inserted during the sub-project negotiation if needed.

Unless otherwise defined in the XR2LEARN subproject contract, or the European Commission or the XR2LEARN coordinator requests or agrees otherwise or unless it is impossible, any communication activity related to the action (including in electronic form, via social media, etc.), any publicity, including at a conference or seminar or any type of information or promotional material (brochure, leaflet, poster, presentation etc.), and any infrastructure, equipment and major results funded by the grant must:

- (a) display the EU emblem;
- (b) display the XR2LEARN logo and
- (c) include the following text:

For communication activities: *“Project [name of the project] has been indirectly funded, via the cascading funding mechanism, from the European Union’s Horizon Europe Research & Innovation programme under project XR2LEARN (grant agreement No 101092851)”*.

For application, software component/tools, and major results: *“This [application][software][insert type of result] has been indirectly funded, via the cascading funding mechanism, from the European Union’s Horizon Europe Research & Innovation programme under project XR2LEARN (grant agreement No 101092851)”*.

When displayed in association with a logo, the European emblem should be given appropriate prominence. This obligation to use the European emblem in respect of projects to which the EC contributes, implies no right of exclusive use. It is subject to general third-party use restrictions which do not permit the appropriation of the emblem, or of any similar trademark or logo, whether by registration or by any other means. Under these conditions, the Beneficiary is exempted from the obligation to obtain prior permission from the EC to use the emblem. Further detailed information on the EU emblem can be found on the Europa web page.

Any publicity made by the sub-project consortium beneficiary in respect of the project, in whatever form and on or by whatever medium, must specify that it reflects only the author’s views and that the EC or XR2LEARN project is not liable for any use that may be made of the information contained therein.

The EC and the XR2LEARN consortium shall be authorised to publish, in whatever form and on or by whatever medium, the following information:

- the name of the sub-project consortium coordinator and beneficiaries;
- contact address of the sub-project consortium coordinator and beneficiaries;
- the general purpose of the XR tools and/or application;
- the amount of the financial contribution foreseen for the consortium and after the final payment, the amount of the financial contribution actually received;
- the geographic location of the activities carried out;
- the list of dissemination activities and/or of patent (applications) relating to foreground;
- the details/references and the abstracts of scientific publications relating to foreground and the published version or the final manuscript accepted for publication;
- any picture or any audio-visual or web material provided to the EC and XR2LEARN in the framework of the project.

The sub-project beneficiaries shall ensure that all necessary authorisations for such publication have been obtained and that the publication of the information by the EC and XR2LEARN does not infringe any rights of third parties.

Upon a duly substantiated request by the beneficiary, the XR2LEARN coordinator, if such permission is provided by the EC, may agree to forego such publicity if disclosure of the information indicated above would risk compromising the beneficiary’s security, academic or commercial interests.

6.5 Financial audits and controls

The European Commission (EC) will monitor that XR2LEARN beneficiaries (including the newly added beneficiary) comply with all the Horizon Europe Grant Agreement obligations and responsibilities [5].

Moreover, the EC may at any time during the implementation of the XR2LEARN project and up to 5 (five) years after the end of the XR2LEARN project, arrange for financial audits to be carried out, by external auditors, or by the EC services themselves including the European Anti-Fraud office (OLAF). The audit procedure shall be deemed to be initiated on the date of receipt of the relevant letter sent by the EC. Such audits may cover financial, systemic and other aspects (such as accounting and management principles) relating to the proper execution of the grant agreement. They shall be carried out on a confidential basis.

Each sub-project consortium beneficiary shall make available directly to the EC all detailed information and data that may be requested by the EC or any representative authorised by it, with a view to verifying that the grant agreement is properly managed and performed in accordance with its provisions and that costs have been charged in compliance with it. This information and data must be precise, complete and effective.

Each sub-project consortium beneficiary shall keep all project deliverables and all documents relating to the activity for up to five years from the end of the project. These shall be made available to the EC where requested during any audit under the grant agreement.

In order to carry out these audits, each sub-project consortium beneficiary shall ensure that the EC's services and any external body(ies) authorised by it have on-the-spot access at all reasonable times, notably to the sub-project applicant offices, to its computer data, to its accounting data and to all the information needed to carry out those audits, including information on individual salaries of persons involved in the project. They shall ensure that the information is readily available on the spot at the moment of the audit and, if so requested, that data be handed over in an appropriate form.

On the basis of the findings made during the financial audit, a provisional report shall be drawn up. It shall be sent by the EC or its authorised representative to the beneficiary concerned, which may make observations thereon within one month of receiving it. The Commission may decide not to take into account observations conveyed or documents sent after that deadline. The final report shall be sent to the beneficiary concerned within two months of expiry of the aforesaid deadline.

On the basis of the conclusions of the audit, the EC shall take all appropriate measures which it considers necessary, including the issuing of recovery orders regarding all or part of the payments made by it and the application of any applicable sanction.

The European Court of Auditors shall have the same rights as the EC, notably right of access, for the purpose of checks and audits, without prejudice to its own rules.

In addition, the EC may carry out on-the-spot checks and inspections in accordance with Council Regulation (Euratom, EC) No 2185/96 of 11 November 1996 concerning on-the-spot checks and inspections carried out by the Commission in order to protect the European Communities' financial interests against fraud and other irregularities.

Checklist

- 1) **Does your planned work fit in with the call for proposals?** Check that your proposed work does indeed address the topics in this open call.
- 2) **Does your proposal address XR2LEARN technology?** Check that your proposed work does indeed address the XR2LEARN technologies (XR and educational scenarios are the target sectors).
- 3) **Is your proposal eligible?** The eligibility criteria are given in chapter **§3 “Proposal Eligibility Criteria”**. In particular, make sure that you satisfy the minimum participation requirements (consortium composition, SME coordinator, all legal entities are established in eligible countries).
- 4) **Is your proposal complete?** Have you completed all mandatory questions and uploaded all necessary documents/Annexes?
- 5) **Does your proposal fulfil questions requests/comments?** Proposals should be precise, concise and must answer the requested questions, which are designed to correspond to the applied evaluation. Omitting requested information will almost certainly lead to lower scores and possible rejection.
- 6) **Have you maximised your chances?** There will be strong competition. Therefore, edit your proposal tightly, strengthen or eliminate weak points.
- 7) **Have you submitted your proposal before the deadline?** It is strongly recommended not to wait until the last minute to submit the proposal. Failure of the proposal to arrive in time for any reason, including network communications delays, is not acceptable as an extenuating circumstance. The time of receipt of the message as recorded by the submission system will be definitive.
- 8) **Have you provided ALL necessary annexes completed and signed for ALL consortium beneficiaries as needed?** Remember that Annex 4 “Consortium Declaration” should be signed by all application consortium beneficiaries, Annex 5 “Declaration of Honour” should be completed and signed by all application consortium beneficiaries and Annex 6 “SME Financial Stability” should be completed and signed by all application consortium SMEs.
- 9) **Do you need further advice and support?** You are advised to communicate with the XR2LEARN team via the XR2LEARN F6S blog.

Do not forget that it is mandatory for each sub-project consortium applicant to have a valid PIC and a valid VAT number during contract preparation time.

7 CONTACTS

The XR2LEARN consortium will provide information to the applicants only via the XR2LEARN F6S blog, so that the information (question and answer), will be visible to all participants.

No binding information will be provided via any other means (e.g. telephone or email).

More info at: <https://xr2learn.eu/open-call-1/>

Apply via: <https://www.f6s.com/xr2learn-open-call-1/apply>

F6S support team: support@f6s.com

Online Q&A: <https://www.f6s.com/xr2learn/>

Other support⁸: opencalls@xr2learn.eu

⁸ For non-binding information

8 REFERENCES

- [1] European Commission , “Recommendation 2003/361/EC,” 2003. [Online]. Available: <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2003:124:0036:0041:en:PDF>.
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