



## D4.1 OPEN CALL DOCUMENTATION, REPORTS AND ANALYTICS

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## Acknowledgment

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## LIST OF ABBREVIATIONS

XR	Extended reality
AR	Augmented reality
MR	Mixed reality
SW	Software
SME	Small and medium-sized enterprises
NFT	Non-fungible token
IPR	Intellectual property rights
EU	European Union
KPI	Key performance indicator
KER	Key exploitable results
MRL	Market Readiness level
TRL	Technology readiness level
OC	Open call
WP	Work package
MVP	Minimum Viable Product
VAT	Valued Added Tax
FAQ	Frequently Asked Questions
ICT	Information and Communications Technology
CET	Central European Time
ESR	Evaluation Summary Report
PIC	Participant Identification Code
EC	European Commission

<b>Partners' names and acronyms</b>	
CNIT	CONSORZIO NAZIONALE INTERUNIVERSITARIO PER LE TELECOMUNICAZIONI
F6S	F6S NETWORK IRELAND LIMITED
MAG	MAGGIOLI SPA
LS	LIGHT AND SHADOWS
SYN	SYNELIXIS SOLUTIONS SA
SUPSI	SCUOLA UNIVERSITARIA PROFESSIONALE DELLA SVIZZERA ITALIANA
UM	UNIVERSITEIT MAASTRICHT
HOU	HELLENIC OPEN UNIVERSITY
EADTU	EUROPEAN ASSOCIATION OF DISTANCE TEACHING UNIVERSITIES
EITM	EIT MANUFACTURING SOUTH SRL

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## EXECUTIVE SUMMARY

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This report constitutes the first version of the deliverable 4.1 regarding the documentation and design of the first open call.

The report outlines a list of documents introducing the interested parties to the XR2Learn project and the first open call and guide them through the processes to follow. Specifically, they present the open call's objectives, targeted stakeholders and timeline and inform about the eligibility and evaluation criteria, as well as the expected phases for the execution of the sub-projects. Furthermore, they provide the applicants with templates that can be used to facilitate the submission process and ensure the immutability of the context. Lastly, applicants are also provided with a set of Frequently Asked Questions that help streamline information access and ensure uniformity of mandatory data.

This report will be updated in M22 with the documents relevant to the design of the second open call, centred around application piloting.



## 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 the XR2LEARN platform that serves as the foundation for a cross-border innovation community for XR in learning. The community is allowing the communication and collaboration of a range of relevant actors like technology providers, application designers and developers, education experts, end-users, and decision makers. By bringing them in direct access they it allows them to match-make interests, enabling as well bottom-up innovation creation.

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

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

The XR2Learn will organise two open calls that have different objectives:

- 1) **Open Call #1:** Will select 7-14 proposals to develop XR applications mainly focusing on industry 5.0 technologies, that will enrich the XR2Learn ecosystem. The projects are expected to start on M13 (January 2024) and will have a duration of 12 months.
- 2) **Open Call #2:** Will select 7-14 proposal to pilot new or already existing XR applications in real life settings. The duration for the execution of the second open call will also be 12 months, the details and its design will be reported in the updated version of this deliverable on M22.

The provided documents included as Annexes, consist of the official Open Call #1 and supply all interested parties with informational content. They can be used as a guide through the all the stages of submitting a proposal namely the preparation of the proposal, the eligibility criteria, the preparation of mandatory documents using the provided templates, and the submission of the proposal. Also, these documents provide additional information about the evaluation criteria and details regarding the execution of the accepted sub-projects. The documents are published as well on the project website: <https://xr2learn.eu/open-call-1/> and submissions are open at the F6S platform: <https://www.f6s.com/xr2learn-open-call-1/apply>.

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## 2. ANNEXES

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The open call materials consist of eight separate documents which are presented in the following subsections. Specifically, they include:

- Annex 1: Open Call #1, introduces the XR2Learn project, offering background information, and an overview of the Open Call is presented, including details about the funding scheme and the projected timeline.
- Annex 2: Guide for Applicants, outlines the eligibility criteria for the applicants and proposals, provides guidance towards the submission of a proposal, and gives insight into the evaluation process for accepting applications to fund.
- Annex 3.1: Open Call Proposal Supplement, includes the proposal template along with instructions for submission.
- Annex 4: Open Call Consortium Declaration, consists of a declaration that needs to be signed by all the consortium partners to ensure the agreement.
- Annex 5: Declaration of Honour, consist of a declaration that ensures the integrity of the information provided through the proposal submission.
- Annex 6: SME Financial Stability, includes the financial stability declaration sheets.
- Annex 7: Coordinator Bank Account Form, includes the bank account form containing the details of the applicant's bank information or the coordinator's if the proposal is submitted by a consortium.
- Annex 8: Frequently Asked Questions, includes commonly asked questions along with answers to streamline applicant's support through the open call proposal submission process.

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## 2.1. Annex 1: Open Call #1

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# ANNEX 1

## XR2LEARN OPEN CALL #1

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XR2LEARN Consortium			
Participant Number	Participant organisation name	Short name	Country
1	Consorzio Nazionale Interuniversitario Per Le Telecomunicazioni	CNIT	Italy
2	F6S Network Ireland Limited	F6S	Ireland
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
10	EIT Manufacturing South Srl	EIT	Italy

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The XR2LEARN project, co-funded from the European Union’s Horizon Research & Innovation programme under grant agreement No 101092851, foresees as an eligible activity the provision of financial support to third parties, as a mean to achieve its own objectives.

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Funding Scheme: Innovation Action (IA) ● Theme: HORIZON-CL4-2022-HUMAN-01-19  
Start date of the project: 01 January 2023 ● Duration: 42 months

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## LIST OF ABBREVIATIONS AND ACRONYMS

Acronym	Description
CET	Central European Time
EC	European Commission
EU	European Union
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 3<sup>rd</sup> 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 XR2LEARN ecosystem.

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

- The **1<sup>st</sup> 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 **2<sup>nd</sup> 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 extend the 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.

**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 with a learning/ training experience that is **as “human as reality”**, and 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 piloting 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 the 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 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 obligations<sup>1</sup>

## 1.3 XR2LEARN Open Call#1 Details

The following details apply to the 1<sup>st</sup> Open Call of XR2LEARN project:

- Each accepted sub-project may receive **between €150,000 and €300,000 funding**.

<sup>1</sup> More information at [https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/horizon/guidance/programme-guide\\_horizon\\_en.pdf](https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/horizon/guidance/programme-guide_horizon_en.pdf)



- **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/training 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**)<sup>2</sup>, while Market Readiness Level (MRL) 3 or higher (**MLR ≥ 3**) is targeted<sup>3</sup>.
- 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.

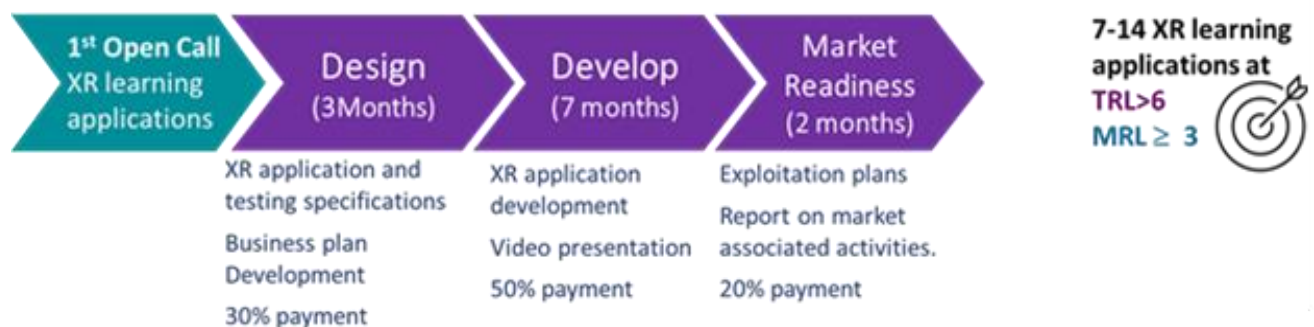





FIGURE 2: XR2LEARN OPEN CALL#1 PHASES

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.

<sup>2</sup> TRL 6 corresponds to technology demonstrated in relevant environment (industrially relevant environment in the case of key enabling technologies)

<sup>3</sup> MLR 3 indicates that stakeholders consider the application interesting

Stage	Overview
<b>DESIGN</b> 	<ul style="list-style-type: none"> <li>● <i>Duration:</i> 3-months, the consortium will work remotely and occasionally participate in integration and testing activities.</li> <li>● <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.</li> <li>● <i>Funding:</i> 30% (lump sum) per sub-project, associated to successful completion of the DESIGN phase, assessed by external reviewers.</li> </ul>
<b>DEVELOP</b> 	<ul style="list-style-type: none"> <li>● <i>Duration:</i> 7 months, the consortium will work remotely and occasionally participate in integration and testing activities.</li> <li>● <i>Activities:</i> The consortium will be developing the proposed XR tools or application, provide n MVP (Minimum Viable Product) and validate it. Delivery of open-source versions of tools and/or applications (under proper license) will also be favoured.</li> <li>● <i>Funding:</i> Up to 80% (lump sum) per sub-project, associated to successful completion of the DEVELOP phase, assessed by external reviewers.</li> </ul>
<b>GROWTH</b> 	<ul style="list-style-type: none"> <li>● <i>Duration:</i> 2 months, the consortium will participate in several meetings and events where they can promote their project goals and outcomes.</li> <li>● <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.</li> <li>● <i>Funding:</i> Up to 100% (lump sum) per sub-project, associated to successful completion of the GROWTH phase, assessed by external reviewers.</li> </ul>

This document provides a full set of information regarding the Open Call #1 for Proposals for the XR2LEARN project. Annex 2, Annex 3.1, Annex 4, Annex 5, Annex 6 and Annex 7 should also be considered for the submission of a Proposal.

## 1.4 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. Non-industrial partners, such as 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 XR2LEARN 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.

## 1.5 Timeline – Open Call #1

Submission to the Open Call #1 will be enabled on Thursday, June 29<sup>th</sup>, 2023, and will end on **Friday, September 29<sup>th</sup>, 2023, at 17:00CET time (Brussels time)**. Selected projects are expected to start on January 1<sup>st</sup>, 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.

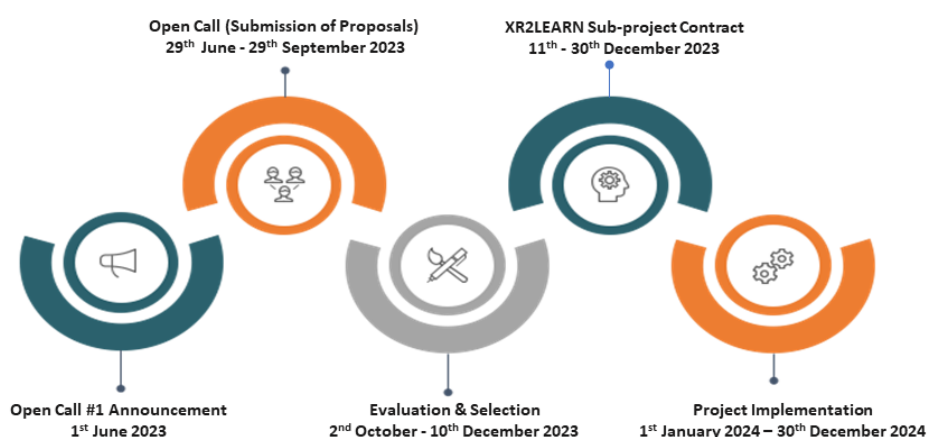


FIGURE 3: XR2LEARN OPEN CALL #1 TIMELINE

## 2 OPEN CALL OVERVIEW

Table 2 provides a summary of the XR2LEARN Open Call #1.

Open Call item Information	Open Call item Information
Call title:	XR2LEARN – Open Call #1
Full name of the EU funded project:	Leveraging the European XR industry technologies to empower immersive learning and training
Project acronym:	XR2LEARN
Grant agreement number:	HORIZON – 101092851
Call publication date:	1 <sup>st</sup> June 2023
Call deadline:	29 <sup>th</sup> September 2023
Expected duration of participation:	12 months (1 <sup>st</sup> January 2024 – 30 <sup>th</sup> December 2024)
Total EU funding available (Open Call #1):	€ 2,100,000
Submission & evaluation process:	<p>The objective of the XR2LEARN – Open Call #1 is to extend the XR2LEARN ecosystem with innovative XR tools and applications targeting training/educational scenarios. 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).</p> <p>An application may be submitted by an individual SME or a small consortium of up to 3 members in total. In case of a consortium, 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).</p> <p>The total amount of funding per successful sub-project will be in the range of €150,000 to €300,000. Each industrial entity may receive between €60,000 and €200,000, while the total funding for all industrial partners should be at <b>least 60%</b> of the total funding.</p> <p>Submissions are available via <a href="https://www.f6s.com/xr2learn-open-call-1/apply">https://www.f6s.com/xr2learn-open-call-1/apply</a></p>
Further information:	Details available at <a href="https://xr2learn.eu/open-call-1/">https://xr2learn.eu/open-call-1/</a>

### 3 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](mailto:support@f6s.com)

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

Other support<sup>4</sup>: [opencalls@xr2learn.eu](mailto:opencalls@xr2learn.eu)

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<sup>4</sup> For non-binding information

## 4 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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## 2.2. Annex 2: Guide for Applicants

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# ANNEX 2 GUIDE FOR APPLICANTS

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The XR2LEARN Consortium is the following:

XR2LEARN Consortium			
Participant Number	Participant organisation name	Short name	Country
1	Consorzio Nazionale Interuniversitario Per Le Telecomunicazioni	CNIT	Italy
2	F6S Network Ireland Limited	F6S	Ireland
3	MAGGIOLI SPA	MAG	Italy
4	Synelxis 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
10	EIT Manufacturing South Srl	EIT	Italy

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The XR2LEARN project, co-funded from the European Union’s Horizon Research & Innovation programme under grant agreement No 101092851, foresees as an eligible activity the provision of financial support to third parties, as a mean to achieve its own objectives.

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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 3<sup>rd</sup> 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 XR2LEARN ecosystem.

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

- The **1<sup>st</sup> 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 **2<sup>nd</sup> 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 3<sup>rd</sup> 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 1<sup>st</sup> 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**)<sup>5</sup>, while Market Readiness Level (MRL) 3 or higher (**MLR ≥ 3**) is targeted<sup>6</sup>.
- 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.

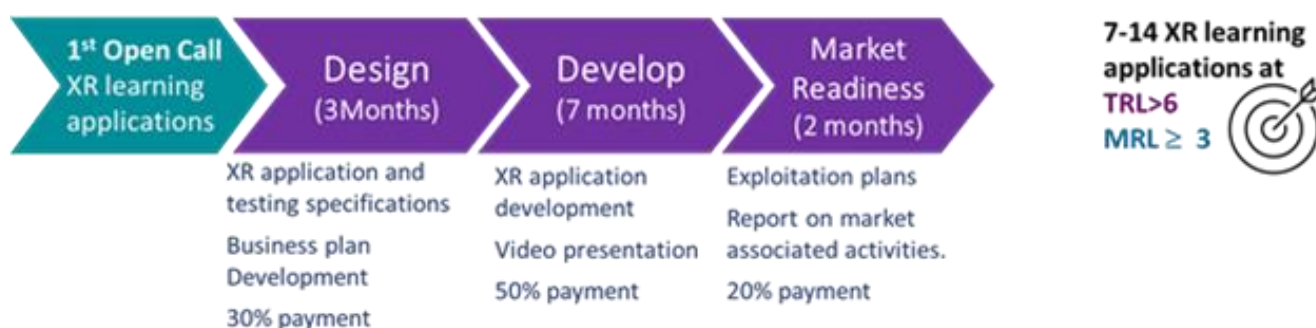




FIGURE 2: XR2LEARN OPEN CALL#1 PHASES


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.

Stage	Overview
<b>DESIGN</b> 	<ol style="list-style-type: none"> <li><i>Duration:</i> 3-months, the consortium will work remotely and occasionally participate in integration and testing activities.</li> <li><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.</li> <li><i>Funding:</i> 30% (lump sum) per sub-project, associated to successful completion of the DESIGN phase, assessed by external reviewers.</li> </ol>
<b>DEVELOP</b> 	<ol style="list-style-type: none"> <li><i>Duration:</i> 7 months, the consortium will work remotely and occasionally participate in integration and testing activities.</li> <li><i>Activities:</i> The consortium will be developing the proposed XR tools or application, provide an MVP (Minimum Viable Product) and validate it. Delivery of open-source versions</li> </ol>

<sup>5</sup> TRL 6 corresponds to technology demonstrated in relevant environment (industrially relevant environment in the case of key enabling technologies)

<sup>6</sup> MLR 3 indicates that stakeholders consider the application interesting



	<p>of tools and/or applications (under proper license) will also be favoured.</p> <p>6 <i>Funding</i>: Up to 80% (lump sum) per sub-project, associated to successful completion of the DEVELOP phase, assessed by external reviewers.</p>
<p><b>GROWTH</b></p> 	<p>7 <i>Duration</i>: 2 months, the consortium will participate in several meetings and events where they can promote their projects goals and outcomes.</p> <p>8 <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.</p> <p>9 <i>Funding</i>: Up to 100% (lump sum) per sub-project, associated to successful completion of the GROWTH phase, assessed by external reviewers.</p>

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 29<sup>th</sup>, 2023, and will end on **Friday September 29<sup>th</sup>, 2023, at 17:00CET time (Brussels time)**. Selected projects are expected to start on 1<sup>st</sup> 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.



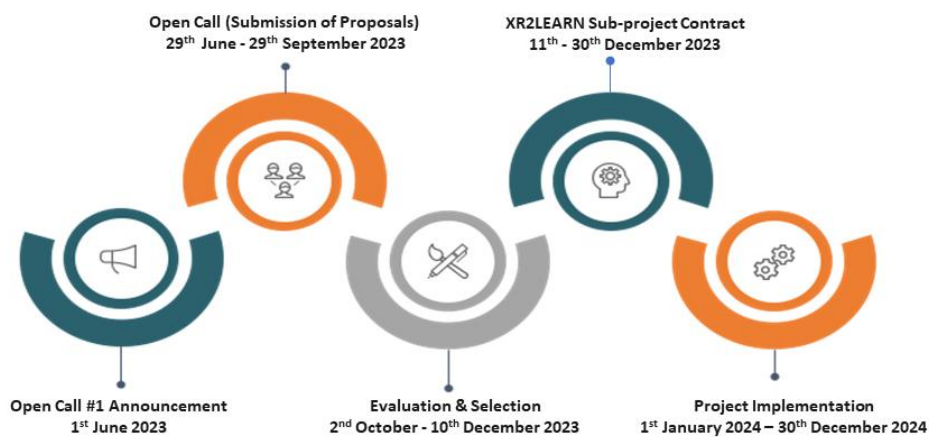


FIGURE 3: XR2LEARN OPEN CALL #1 TIMELINE

## 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 obligations<sup>7</sup>

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<sup>7</sup> More information at [https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/horizon/guidance/programme-guide\\_horizon\\_en.pdf](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:

- Independent (not linked or owned by another enterprise), in accordance to Recommendation 2003/361/EC.
- Headcount in Annual Work Unit (AWU) less than 250.
- 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:

- It is a legal entity, that comply to the SME definition as defined in section 3.1<sup>8</sup>
- 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]
- It is an IT technology provider, such as XR tools, XR applications and services.
- 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.
- 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.
- Have not been convicted for fraudulent behaviours, other financial irregularities, unethical or illegal business practices.
- Are not under liquidation or an enterprise under difficulty accordingly to the Commission Regulation No 651/2014 art. 2.18.

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<sup>8</sup> 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:

Proposals must offer technological developments such as **XR tools and applications targeting educational scenarios**.

Proposals must have a **clear European dimension** and contribute towards EU digitization, **targeting clear economic and societal impact**.

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).

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.

**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.

**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.

**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:

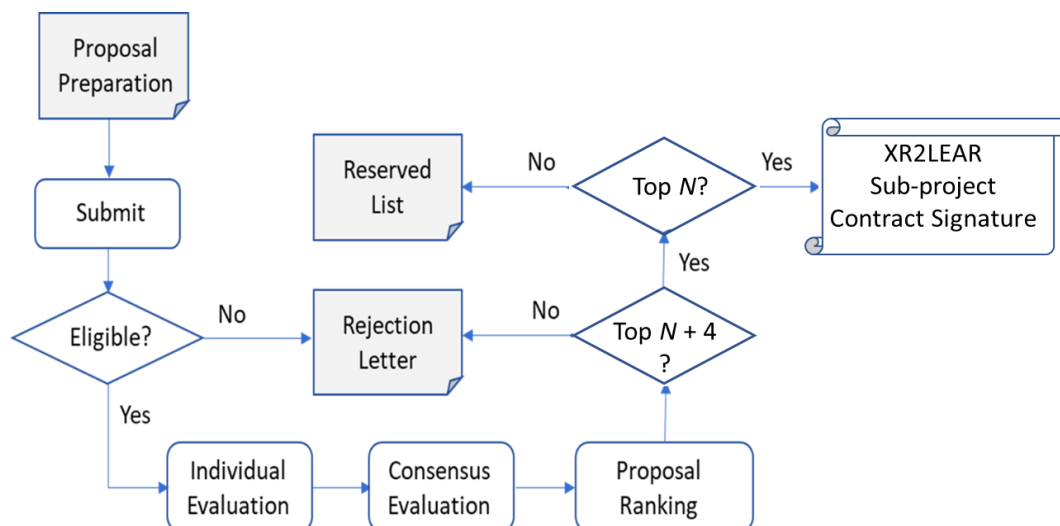


FIGURE 4: XR2LEARN EVALUATION PROCESS SUMMARY

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:

- (a) 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>.
- (b) 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.
- (c) 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/>).
- (d) 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](mailto: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 29<sup>th</sup>, 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 2.2 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:



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

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 (€1.470.00) will be granted to projects relevant to industry 5.0 technologies<sup>9</sup>. 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).
- **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**

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<sup>9</sup> 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.

**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:

- a. To address the comments (if any) in the Evaluation Summary Report of the proposals, especially potential Ethical issues.
- b. To validate the status information, at least the following documents will be required for all applicants/ consortium members of each sub-project:
  - a. **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).
  - b. **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.
  - c. 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.
- c. **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 VAT<sup>10</sup>. 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

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<sup>10</sup> To be checked at EC services such as [http://ec.europa.eu/taxation\\_customs/vies/](http://ec.europa.eu/taxation_customs/vies/)

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:

- a. Related to the evaluation process or eligibility checks.
- b. Clearly describe the complaint.
- c. 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.
- d. 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:

- e. 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.
- f. 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.
- g. 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.

## 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.

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:

- a) Motivation and technological background of the proposed XR Application
- b) XR Application to Educational scenarios
- c) Detailed design of the proposed XR Application
- d) 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:

- i. Two Independent Experts external to XR2LEARN consortium
- ii. 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:

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:

- iii. Two Independent Experts external to XR2LEARN consortium.
- iv. One XR2LEARN consortium member acting as moderator.
- v. 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:

- vi. Two Independent Experts external to XR2LEARN consortium.
- vii. One XR2LEARN consortium member acting as moderator.
- viii. 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:

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 include<sup>11</sup>:

### 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.

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<sup>11</sup> 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.

## 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.

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:

- 1 display the EU emblem;
- 2 display the XR2LEARN logo and
- 3 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:

- 1) the name of the sub-project consortium coordinator and beneficiaries;
- 2) contact address of the sub-project consortium coordinator and beneficiaries;
- 3) the general purpose of the XR tools and/or application;
- 4) the amount of the financial contribution foreseen for the consortium and after the final payment, the amount of the financial contribution actually received;
- 5) the geographic location of the activities carried out;

- 6) the list of dissemination activities and/or of patent (applications) relating to foreground;
- 7) the details/references and the abstracts of scientific publications relating to foreground and the published version or the final manuscript accepted for publication;
- 8) 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

- **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.
- **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).
- **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).
- **Is your proposal complete?** Have you completed all mandatory questions and uploaded all necessary documents/Annexes?
- **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.
- **Have you maximised your chances?** There will be strong competition. Therefore, edit your proposal tightly, strengthen or eliminate weak points.
- **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.
- **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.
- **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](mailto:support@f6s.com)

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

Other support<sup>12</sup>: [opencalls@xr2learn.eu](mailto:opencalls@xr2learn.eu)

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<sup>12</sup> 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>.
- [2] European Commission, “SME Definition Guide,” [Online]. Available: [http://ec.europa.eu/enterprise/policies/sme/files/sme\\_definition/sme\\_user\\_guide\\_en.pdf](http://ec.europa.eu/enterprise/policies/sme/files/sme_definition/sme_user_guide_en.pdf) .
- [3] European Commission, [Online]. Available: [https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/common/guidance/list-3rd-country-participation\\_horizon-euratom\\_en.pdf](https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/common/guidance/list-3rd-country-participation_horizon-euratom_en.pdf) .
- [4] European Commission, [Online]. Available: [https://ec.europa.eu/research/participants/docs/h2020-funding-guide/grants/applying-for-funding/register-an-organisation/financial-capacity-check\\_en.htm](https://ec.europa.eu/research/participants/docs/h2020-funding-guide/grants/applying-for-funding/register-an-organisation/financial-capacity-check_en.htm) .
- [5] European Commission, “Model Grant Agreement,” [Online]. Available: [https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/horizon/agr-contr/unit-mga\\_he\\_en.pdf](https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/horizon/agr-contr/unit-mga_he_en.pdf).

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## 2.3. Annex 3.1: Open Call Proposal Supplement

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# ANNEX 3.1 OPEN CALL PROPOSAL SUPPLEMENT

## PROPOSAL TEMPLATE - INSTRUCTIONS

### **Please read carefully before starting your proposal:**

Please use this template to prepare your proposal. It has been organized to ensure that the important aspects of your planned work are measurable with respect to the evaluation criteria. Sections 1 to 4 of this template each correspond to an evaluation criterion (for details see Annex 2: Guide for Applicants at <https://xr2learn.eu/wp-content/uploads/2023/06/XR2Learn-Annex-2-Guide-for-Applicants.pdf>).

The structure of this template **must** be followed when preparing your proposal. Applicants using another template/ document structure will be automatically disqualified. Only those proposals that successfully address all the required aspects included in the template will have the opportunity to be included in the XR2Learn consortium.

The page limit for the proposal (Sections 1-4) is **9 pages** (i.e., limit excludes the cover and summary of the project page, and Ethics and Security section). Consider the limits indicated below the title of each section as guidance to keep within the page limit. Tables are allowed and must be included within this page limit. The minimum font size allowed is 11 points (note: tables can use font size 10 points). The page size is A4, and all margins (top, bottom, left, right) should not be changed from their current setting. Paragraph spacing should be a minimum 0pt before/ after, and 1pt line spacing. It is recommended to use Calibri as the font style and black as the font colour to facilitate readability.

**If you attempt to upload a proposal longer than the specified limit, excess pages will not be taken into consideration by the evaluating experts.**

Please delete these first two pages when submitting the proposal. Delete the guidance/ information text in green in each section and any footnotes.

## XR2LEARN OPEN CALL – COVER PAGE

Proposal Information and Participants	
Proposal acronym:	
Proposal title:	
The proposal targets Industry 5.0 (YES/NO)	
The developed XR tools/application will be released as Open Source (YES/NO)	

Coordinator/Consortium Leader Information 1	
Applicant Name	
Applicant Short Name	PIC Number
Address	
Country	
Department Name	
SME [Yes/No]	

Consortium Partner Information 2	
Applicant Name	
Applicant Short Name	PIC Number
Address	
Country	
Department Name	
Industry [Yes/No]	

Consortium Partner Information 3	
Applicant Name	
Applicant Short Name	PIC Number
Address	
Country	
Department Name	
Industry [Yes/No]	

## SUMMARY OF THE PROJECT

**NOTE: MAXIMUM OF 1 PAGE**

*Provide a full public summary of the project that can be published if the project is funded.*

# 1 CONCEPT AND IMPLEMENTATION

**NOTE: MAXIMUM OF 3 PAGES, COVERING SECTION 1.1 AND 1.2**

## 1.1 Concept and objectives

*Describe the overall concept and objectives (general and specific) of the project within the scope of the open call and XR2Learn project, addressing the challenge proposed by the project and the selected sub-domain/s. Include also:*

- 1 The technical challenges and barriers expected to be solved, aligned with the XR2LEARN project concept.*
- 2 Expected project outcomes, which should be justified, measurable and realistic within the timeline of the project implementation.*
- 3 The innovation potential, and how the project is novel. The circular nature of the project.*
- 4 The current and the target technology readiness level (TRL) of the proposed tool/application.*

## 1.2 Implementation

*Describe the proposed workplan to be implemented towards the achievement of the objectives/ results. Include also:*

- 5 The specific activities that will be implemented, the time required, and expected outputs.*
- 6 Relevant milestones and KPIs to measure achievement of results.*
- 7 External barriers/ risks that may affect the workplan and compromise the project.*
- 8 How the experiment will be demonstrated and validated at the pilot location of the industrial partner.*

**Table 8. Suggested table for description of activities**

Workplan activity name	Activity description	Planned duration	Expected output
Activity 1			
Activity 2			
Activity 3			

**NOTE: Add lines (for activities) as required**

**Table 9. Suggested table for description of milestones**

Milestone name	Milestone description	Delivery month
Milestone 1		
Milestone 2		
Milestone 3		

**NOTE: Add lines (for milestones) as required**



## 2 IMPACT

**NOTE: MAXIMUM OF 3 PAGES, COVERING SECTION 2.1 TO 2.4**

### 2.1 Socio-economic impact

*Describe the overall impact of the project. Also:*

- 9 *Describe the relevance and socio-economic impact and benefits of your project/component and planned tools/ applications.*
- 10 *Describe the industrial relevance and market potential of the project and planned experiment.*
- 11 *Describe the circular nature of the planned experiment.*

### 2.2 Commercialisation and business strategy

*Describe the commercialization and business strategy of the project: Include also:*

- 12 *Planned activities (during and post-project) to ensure the commercialisation of the solution and business strategy to ensure the sustainability of expected project outcomes.*
- 13 *Describe the industrial relevance and market potential of the project and planned experiment.*
- 14 *In case the XR tools/applications will be provided as Open Source add details and Open-Source Licence.*

### 2.3 Dissemination Plan

*Describe the business and scientific dissemination plan. Include also:*

- 15 *Planned dissemination activities (during and post-project) to ensure the project's impact.*
- 16 *Planned scientific dissemination activities (during and post-project) to ensure the project's impact.*

### 2.4 Sustainability strategy

*Describe the sustainability strategy. Include also:*

- 17 *Planned activities to Open Source and XR Communities to ensure sustainability.*
- 18 *Planned contributions to clusters, partnerships, alliances and associations.*
- 19 *Planned activities to relevant standardization activities to ensure sustainability.*
- 20 *The current and the target Market readiness level (MRL) of the proposed tool/application.*

## 3 APPLICANT DESCRIPTION

**NOTE: MAXIMUM OF 2 ½ PAGES, COVERING SECTION 3.1 to 3.4**

### 3.1 Applicant Profile

*Provide the profile of the applicant. Please include:*

- 21 A short summary of the relevant experience of the applicant.*
- 22 Justification of the partners' complementarities.*
- 23 If applicable, explain the alignment of the proposed project with the applicant's business and strategy (e.g., if this is a new line of work, etc.).*
- 24 Participation in relevant open source or XR communities, along with active role in relevant clusters, partnerships, alliances, associations, and standardization organisms.*

### 3.2 Applicant Relevant Experience

*Justify the previous relevant experience. Please:*

- 25 Include references and role in previous projects relevant to the proposal.*
- 26 Include products or product-lines relevant to the proposal.*
- 27 Include up to 5 most relevant publications, participation in conferences, collaborations, community projects, etc. Links that evidence these records are recommended as they will help evaluators assess the consortium's experience and skills).*

### 3.3 Exploitation Plan

*Briefly justify the exploitation plan of the applicant.*

### 3.4 Short CVs of relevant personnel

*Briefly described the relevant personnel.*

- 28 Justification of how the team has the required knowledge and capacity to guarantee a successful project implementation.*
- 29 Justification of the applicant's gender balance.*

*Note that if the team suffers any modification after the submission of the proposal, this modification should be communicated and duly justified to the XR2Learn consortium via email for approval, as this section will be evaluated according to the specific people proposed.*

## 4 RESOURCES

### NOTE: MAXIMUM OF ½ PAGE

Please indicate the number of person-months (full-time equivalent) of people involved in the project in the table below for the duration (up to 12 months) of the project.

**Table 10. Person-months allocated to the project**

Employee name	Gender (M/F)	Organization	Role in the project	Person Months <sup>13</sup>
Person 1				
Person 2				
Person 3				
TOTAL				

NOTE: Add lines as required (for persons identified in Section 3.4)

**Table 11. Person-months allocated to the project**

Partner Short Name	Role in the project	SME (Yes/No)	Training / Educational Institute (Yes/No)	Requested Funding (in EUROS)	Requested Funding %
Total					100%

<sup>13</sup> Note that a Person Month is a metric for expressing the effort of a person dedicated full time in one month.

## 5 ETHICS AND SECURITY

**NOTE: PLEASE FILL OUT THE ETHICS/ SECURITY ANNEX ON THE FOLOWING PAGE.**

### 5.1 Ethics

If you have entered any ethics issues in the ethical issue table, you must:

submit an ethics self-assessment, which:

- describes how the proposal meets the national legal and ethical requirements of the country or countries where the tasks raising ethical issues are to be carried out;

- explains in detail how you intend to address the issues in the ethical issues table, in particular as regards:

  - research objectives (e.g. study of vulnerable populations, dual use, etc.)

  - research methodology (e.g. clinical trials, involvement of children and related consent procedures, protection of any data collected, etc.)

  - the potential impact of the research (e.g. dual use issues, environmental damage, stigmatization of particular social groups, political or financial retaliation, benefit-sharing, malevolent use, etc.).

provide the documents that you need under national law (if you already have them), e.g.:

- an ethics committee opinion

- the document notifying activities raising ethical issues or authorizing such activities

  - ⚠ If these documents are not in English, you must also submit an English summary of them (containing, if available, the conclusions of the committee or authority concerned).

  - ⚠ If you plan to request these documents specifically for the project you are proposing, your request must contain an explicit reference to the project title.

### 5.2 Security

**Please indicate if your project will involve:**

Activities or results raising security issues: [YES/NO]

'EU-classified information' as background or results: [YES/NO]

Any potential "dual use" of results: [YES/NO]

## ANNEX: Ethics/Security checklist

### ETHICAL ISSUES TABLE

	Page
<b>Informed consent</b>	
Does the proposal involve children?	
Does the proposal involve patients or persons not able to give consent?	
Does the proposal involve adult healthy volunteers?	
Does the proposal involve Human Genetic Material?	
Does the proposal involve Human biological samples?	
Does the proposal involve Human data collection?	
<b>Research on human embryo/foetus</b>	
Does the proposal involve Human Embryos?	
Does the proposal involve Human Foetal Tissue / Cells?	
Does the proposal involve Human Embryonic Stem Cells?	
<b>Privacy</b>	
Does the proposal involve processing of genetic information or personal data (e.g., health, sexual lifestyle, ethnicity, political opinion, religious or philosophical conviction)	
Does the proposal involve tracking the location or observation of people?	
<b>Research on animals</b>	
Does the proposal involve research on animals?	
Are those animals transgenic small laboratory animals?	
Are those animals transgenic farm animals?	
Are those animals cloned farm animals?	
Are those animals nonhuman primates?	
<b>Research involving developing countries</b>	
Use of local resources (genetic, animal, plant etc)	
Benefit to local community (capacity building i.e., access to healthcare, education etc)	
<b>Dual use</b>	
Research having direct military application	
Research having the potential for terrorist abuse	
<b>ICT implants</b>	
Does the proposal involve clinical trials of ICT implants?	
<b>I CONFIRM THAT NONE OF THE ABOVE ISSUES APPLY TO MY PROPOSAL</b>	<b>YES/NO</b>

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## 2.4. Annex 4: Consortium Declaration

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# ANNEX 4 OPEN CALL CONSORTIUM DECLARATION



## Consortium Declaration

**Title of the Project:** \_\_\_\_\_

On behalf of \_\_\_\_\_ (SME Company name)  
established in \_\_\_\_\_,  
(Official address), VAT/TAX number \_\_\_\_\_, represented for the purposes of  
signing and submitting the Declaration by \_\_\_\_\_ (Name of legal  
representative), declares that all provided information in the scope of this Open Call is  
true and legally binding.

As the consortium leader, I, \_\_\_\_\_ (SME legal representative name)  
declare that all consortium partners have agreed on their roles and budget shares and  
**I am solely responsible to distribute the budget shares to Consortium partners in  
accordance to this Consortium Declaration.**

**By signing this declaration, all consortium partners, SMEs, mid-caps or institution and  
all individuals participating in the proposal declare that:**

- **The Consortium Leader/ Coordinator is an SME**
- **XR2LEARN consortium bears no responsibility in case the Consortium coordinator/leader violates the mutual agreement set in this Consortium Declaration.**
- **XR2LEARN Consortium bears no responsibility in case of dispute among consortium partners regarding IP rights.**
- **The legal entities that we represent do not participate directly, indirectly or in any capacity to more than one proposal submitted in the XR2LEARN Open Call #1.**
- **There is no linked or associated entity participating to more than one proposal submitted in the XR2LEARN Open Call #1.** As indicative example, without excluding other cases, it is not allowed for two companies or institutions that are administratively associated or members of the same group to participate at two individual proposals.
- **The legal entities of the application consortium do not have any formal relationship with any XR2LEARN consortium beneficiaries.** As indicative example, without excluding other cases, it is not allowed any company or institution participating to the Open Call to be administratively associated or members of the same group with any XR2LEARN consortium member.
- **No legal entity or individual member of the Consortium team 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 a legal entity or individual to be in the project team or consortium, the advisory board or subcontractor of more than one proposal. Moreover, it is not allowed for a legal entity or 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 proposals.

**In case, one of the above conditions are violated, both Consortia in their entirety will be excluded.**

By submitting this document, Consortium accepts all the rules explained in **Annex 2: “Guidelines for Applicants.”**



**[1] Consortium leader/Coordinator**

SME Legal name	
Full address	
Country	
Legal representative name	
Is this entity an SME?	YES
Project requested funding (in EUROS)	_____ (min. 150.000€, max. 300.000€)
Funding for Industrial partners (%)	_____ (at least 60% of the funding)
Funding for Research Institutions, Educational, Teaching or Academia (%)	_____ (less than 40% of the funding)
Coordinator Budget share (in EUROS)	_____ (min. 60.000€, max. 200.000€)
Legal representative signature and stamp	

**[2] Consortium partner No 2**

Legal entity name	
Full address	
Legal representative name	
Is this entity an industrial entity? (YES/NO)	
Budget share (in EUROS)	_____ (min. 60.000€, max. 200.000€)
Legal representative signature and stamp	

**[3] Consortium partner No 3**

Legal entity name	
Full address	
Legal representative name	
Is this entity an industrial entity? (YES/NO)	
Budget share (in EUROS)	_____ (min. 60.000€, max. 200.000€)
Legal representative signature and stamp	

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## 2.5. Annex 5: Declaration of Honour

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# ANNEX 5 DECLARATION OF HONOUR

## Declaration of Honour<sup>14</sup>

**Proposal Title** \_\_\_\_\_

On behalf of \_\_\_\_\_ (Company name)  
established in \_\_\_\_\_,  
(Official address), VAT/TAX number \_\_\_\_\_, represented for the purposes of  
signing and submitting the Declaration by \_\_\_\_\_  
(Name of legal representative), declares that all provided information in the scope of  
this Open Call is true and legally binding.

By signing this document, I declare that:

1. I have the power of legally binding the legal entity that I represent on submitting/participating in this proposal.
2. Neither the above-mentioned legal entity nor any linked legal entity nor any individual member of the proposal team has submitted any other proposal under XR2LEARN Open Call. In case the above-mentioned legal entity or linked legal entity or individual member of the proposal team has submitted more than one proposals in this Open Call, all associated proposals will be automatically excluded from the evaluation process.
3. I and the above legal entity that I legally represent are fully aware and duly accept all XR2LEARN rules and conditions as expressed in XR2LEARN Open Call documents and all Annexes and will fully respect any evaluation decision and proposal selection. Failure to follow the rules defined in the Open Call document and the Annexes will result in automatic rejection of this application in its entirety.
4. In case of SME, the information included in the **Annex 6: SME Financial Stability Declaration** document is true and legally binding.
5. I declare that the mentioned legal entity is not in one of the following situations:
  - a. Is bankrupt or being wound up, is having its affairs administered by the courts, has entered an arrangement with creditors, has suspended business activities, is the subject of proceedings concerning those matters, or is in any analogous situation arising from a similar procedure provided for in national legislation or regulations.
  - b. It or the persons having powers of representation, decision making or control over it have been convicted of an offence concerning their professional conduct by a judgment which has the force of res judicata.
  - c. Has been guilty of grave professional misconduct proven by any means that the contracting authority can justify, including by decisions of the European Investment Bank and international organisations.
  - d. Is not in compliance with its obligations relating to the payment of social security contributions or the payment of taxes in accordance with the legal provisions of the country in which it is established, or with those of the country of the contracting authority or those of the country where the contract is to be performed, to be proved by the deliverance of official documents issued by the local authorities, according to the local applicable rules.
  - e. It or persons having powers of representation, decision making or control over it have been the subject of a judgment which has the force of res judicata for fraud, corruption, involvement in a criminal organization or any other illegal

<sup>14</sup> Repeat the Declaration of Honour section (pages 2 & 3 of this Annex) for ALL partners in the consortium

activity, where such illegal activity is detrimental to the Union's financial interests.

- f. Is subject to an administrative penalty for being guilty of misrepresenting the information required by the contracting authority as a condition of participation in a grant award procedure or another procurement procedure or failing to supply this information or having been declared to be in serious breach of its obligations under contracts or grants covered by the Union's budget.
6. I declare that neither myself nor any natural persons with power of representation, decision-making or control over the above-mentioned legal entity are not in the situations referred to in points (a) to (f) above;
  7. I declare that:
    - a. Neither myself nor any person that I know is subject to a XR2LEARN conflict of interest.
    - b. I have not made false declarations in supplying the information required by participation in the XR2LEARN Open Calls or does not fail to supply this information.
    - c. Neither myself nor any person that I know participates, controls, submits or is associated in any way with more than one proposals in the Open Call.
  8. I certify that the legal entity that I represent:
    - Is committed to participate in the abovementioned project.
    - Has or will have the necessary resources as and when needed to carry out its involvement in the above-mentioned project.
  9. I give the consent and permission to the XR2LEARN Project coordinator to use the attached information to contact me for any issue associated with the above application
  10. All provided information in this declaration is true and legally binding.

**Entity legal representative contact information:**

<b>Title (Mr, Mrs, Dr.)</b>	
<b>Name</b>	
<b>Surname</b>	
<b>Position in the legal entity</b>	
<b>Full Address</b>	
<b>Country</b>	
<b>Email Address</b>	
<b>Telephone</b>	
<b>Mobile</b>	
<b>Signature, Date and stamp</b>	



## 2.6. Annex 6: SME Financial Stability



## ANNEX 6 SME FINANCIAL STABILITY

## DECLARATION ON STATUS & FINANCIAL STABILITY<sup>15</sup>

**Specific identification of the applicant enterprise:**

<b>Name or Business Name</b>	_____
<b>Address (or Registered office)</b>	_____
<b>Registration/ VAT number</b>	_____
<b>Names and titles of principal directors</b>	_____
<b>Date of Foundation</b>	_____
<b>PIC number<sup>16</sup></b>	_____

**Type of enterprise** (see explanatory note)

Select to indicate which case(s) applies to the applicant enterprise:

<input type="checkbox"/>	<b>Autonomous enterprise</b>	In this case the data filled in the box below result from the accounts of the applicant enterprise only. Fill in the declaration only, without annex.
<input type="checkbox"/>	<b>Partner enterprise</b>	Fill in and attach the annex (and any additional sheets), then complete the declaration by copying the results of the calculations into the box below.
<input type="checkbox"/>	<b>Linked enterprise</b>	

**Data used to determine the category of enterprise**

Calculated according to Article 6 of the Annex to the Commission Recommendation 2003/361/EC.

<b>Reference period (*)</b> _____		
Headcount (AWU)	Annual turnover (**)	Balance sheet total (**)
_____	_____	_____

(\*) All data must be related to the last approved accounting period and calculated on an annual basis.

(\*\*) EUR 1 000.

<b>Is the organization an SME?</b>	<input type="checkbox"/> <b>Yes</b>	<input type="checkbox"/> <b>No</b>
------------------------------------	-------------------------------------	------------------------------------

<b>Important:</b> Compared to the previous accounting period there is a change regarding the data, which could result in a change of category of the applicant enterprise (micro, small, medium-sized, or big enterprise).	<input type="checkbox"/> <b>No</b>  <input type="checkbox"/> <b>Yes</b> (in this case fill in and attach a declaration regarding the previous accounting period).
--	---

**Signature**

Name and position of the signatory, being authorized to represent the enterprise:

\_\_\_\_\_

I declare on my honour the accuracy of this declaration and of any annexes thereto.

**Done at:** \_\_\_\_\_ (place) on \_\_\_\_\_ (day) \_\_\_\_\_ (month) \_\_\_\_\_ (year)

Signature: \_\_\_\_\_

<sup>15</sup> Replicate pages 2 to 10 to cover ALL SMEs which are members of the consortium.

<sup>16</sup> The European Commission 9-digit Participant Identification Code (PIC). For more information please visit:  
<https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/how-to-participate/participant-register>



# EXPLANATORY NOTE ON THE TYPES OF ENTERPRISES TAKEN INTO ACCOUNT FOR CALCULATING THE HEADCOUNT AND THE FINANCIAL AMOUNTS

## I. TYPES OF ENTERPRISES

The definition of an SME<sup>17</sup> distinguishes three types of enterprise, according to their relationship with other enterprises in terms of holdings of capital or voting rights or the right to exercise a dominant influence<sup>18</sup>.

### **Type 1: Autonomous Enterprise**

This is by far the most common type of enterprise. It applies to all enterprises which are not one of the two other types of enterprise (partner or linked). An applicant enterprise is autonomous if it:

- Does not have a holding of 25%<sup>19</sup> or more in any other enterprise,
- And is not 25%<sup>19</sup> or more owned by any enterprise or public body or jointly by several linked enterprises or public bodies, apart from some exceptions<sup>20</sup>,
- And does not draw up consolidated accounts and is not included in the accounts of an enterprise which draws up consolidated accounts and is thus not a linked enterprise<sup>21</sup>.

### **Type 2: Partner Enterprise**

This type represents the situation of enterprises which establish major financial partnerships with other enterprises, without the one exercising effective direct or indirect control over the other. Partners are enterprises which are not autonomous, but which are not linked to one another.

The applicant enterprise is a partner of another enterprise if:

- It has a holding or voting rights equal to or greater than 25% in the other enterprise, or the other enterprise has a holding or voting rights equal to or greater than 25% in the applicant enterprise.

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<sup>17</sup> Henceforth in the text, the term "Definition" refers to the Annex to Commission Recommendation 2003/361/EC on the definition of SMEs.

<sup>18</sup> Definition, Article 3

<sup>19</sup> In terms of the share of the capital or voting rights, whichever is higher is applied. To this percentage should be added the holding in that same enterprise of each enterprise, which is linked to the holding company (Definition, Article 3 paragraph 2)

<sup>20</sup> An enterprise may continue being considered as autonomous when this 25% threshold is reached or exceeded, if that percentage is held by the following categories of investors (provided that those are not linked with the applicant enterprise):

- a) public investment corporations, venture capital companies, individuals or groups of individuals with a regular venture capital investment activity who invest equity capital in unquoted businesses ("business angels"), provided the total investment of those business angels in the same enterprise is less than EUR 1 250 000,
- b) universities or non-profit research centres,
- c) institutional investors, including regional development funds,
- d) autonomous local authorities with an annual budget of less than EUR 10 million and less than 5000 inhabitants.

(Definition, Article 3 paragraph 2, second sub-paragraph)

<sup>21</sup> - If the registered office of the enterprise is situated in a Member State which has provided for an exception to the requirement to draw up such accounts pursuant to the Seventh Council Directive 83/349/EEC of 13 June 1983, the enterprise should nevertheless check specifically whether it does not meet one or other of the conditions laid down in Article 3 paragraph 3 of the Definition.

- There are also some very rare cases in which an enterprise may be considered linked to another enterprise through a person or a group of natural persons acting jointly (Definition, Article 3 paragraph 3).

- Conversely, there are very few cases of enterprises drawing up consolidated accounts voluntarily, without being required to do so under the Seventh Directive. In that case, the enterprise is not necessarily linked and can consider itself only a partner. To determine whether the enterprise is linked or not, in each of the three situations it should be checked whether or not the enterprise meets one or other of the conditions laid down in Article 3 paragraph 3 of the Definition, where applicable through a natural person or group of natural persons acting jointly.

- The enterprises are not linked enterprises within the meaning defined below, which means, among other things, that the voting rights of one in the other do not exceed 50%.
- And the applicant enterprise does not draw up consolidated accounts which include the other enterprise by consolidation and is not included by consolidation in the accounts of the other enterprise or of an enterprise linked to it<sup>21</sup>.

### **Type 3: Linked Enterprise**

This type corresponds to the economic situation of enterprises which form a group through the direct or indirect control of the majority of the voting rights (including through agreements or, in certain cases, through natural persons as shareholders), or through the ability to exercise a dominant influence on an enterprise. Such cases are thus less frequent than the two preceding types.

To avoid difficulties of interpretation for enterprises, the Commission has defined this type of enterprise by taking over – wherever they are suitable for the purposes of the Definition – the conditions set out in Article 1 of Council Directive 83/349/EEC on consolidated accounts<sup>22</sup>, which has been applied for many years.

An enterprise thus generally knows immediately that it is linked, since it is already required under that Directive to draw up consolidated accounts or is included by consolidation in the accounts of an enterprise which is required to draw up such consolidated accounts.

The only two cases, which are however not very frequent, in which an enterprise can be considered linked although it is not already required to draw up consolidated accounts, are described in the first two indents of endnote 5 of this explanatory note. In those cases, the enterprise should check whether it meets one or other of the conditions set out in Article 3 paragraph 3 of the Definition.

## **II. THE HEADCOUNT AND THE ANNUAL WORK UNITS<sup>23</sup>**

The headcount of an enterprise corresponds to the number of annual work units (AWU).

### **Who is included in the headcount?**

- The employees of the applicant enterprise
- persons working for the enterprise being subordinate to it and considered to be employees under national law
- owner-managers
- partners engaging in a regular activity in the enterprise and benefiting from financial advantages from the enterprise.

Apprentices or students engaged in vocational training with an apprenticeship or vocational training contract are not considered in the headcount.

### **How is the headcount calculated?**

One AWU corresponds to one person who worked full-time in the enterprise in question or on its behalf during the entire reference year. The headcount is expressed in AWUs.

The work of persons, who did not work the entire year, or who worked part-time – regardless of its duration – and seasonal work is counted as fractions of AWU. The duration of maternity or parental leaves is not counted.

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<sup>22</sup> Seventh Council Directive 83/349/EEC of 13 June 1983, based on Article 54(3)(g) of the Treaty and concerning consolidated accounts (OJ L 193 of 18.7.1983, p. 1), as last amended by Directive 2001/65/EC of the European Parliament and of the Council (OJ L 283 of 27.10.2001, p. 28).

<sup>23</sup> Definition, Article 5.

## ANNEX TO THE DECLARATION CALCULATION FOR THE PARTNER OR LINKED TYPE OF ENTREPRISE

### Annexes to be enclosed if necessary

- **Annex A** if the applicant enterprise has at least one partner enterprise (and any additional sheets)
- **Annex B** if the applicant enterprise has at least one linked enterprise (and any additional sheets)

### Calculation for the partner or linked type of enterprise<sup>24</sup> (see explanatory note)

Reference period <sup>25</sup> :			
	Headcount (AWU)	Annual turnover (*)	Balance sheet total (*)
1. Data <sup>25</sup> of the applicant enterprise or consolidated accounts (copy data from box B(1) in annex B <sup>26</sup> )			
2. Proportionally aggregated data <sup>25</sup> of all partner enterprises (if any) (copy data from box A in annex A)			
3. Added up data <sup>25</sup> of all linked enterprises (if any) – if not included by consolidation in line 1 (copy data from box B(2) in annex B)			
<b>Total</b>			
(*) EUR 1 000.			

**NOTE:** The data entered in the "Total" row of the above table should be entered in the box "Data used to determine the category of enterprise" in the declaration.

<sup>24</sup> Definition, Article 6 paragraphs 2 and 3

<sup>25</sup> All data must be relating to the last approved accounting period and calculated on an annual basis. In the case of newly-established enterprises whose accounts have not yet been approved, the data to apply shall be derived from a reliable estimate made in the course of the financial year (Definition, Article 4).

<sup>26</sup> The data of the enterprise, including the headcount, are determined on the basis of the accounts and other data of the enterprise or, where they exist, the consolidated accounts of the enterprise, or the consolidated accounts in which the enterprise is included through consolidation.

## ANNEX A

### Partner enterprises

For each enterprise for which a 'partnership sheet' has been completed (one sheet for each partner enterprise of the applicant enterprise and for any partner enterprises of any linked enterprise, of which the data is not yet included in the consolidated accounts of that linked enterprise), the data in the 'partnership box' in question should be entered in the summary table below:

#### BOX A

Partner enterprise (name / identification)	Headcount (AWU)	Annual turnover (*)	Balance sheet total (*)
1.			
2.			
3.			
4.			
5.			
6.			
7.			
<b>Total</b>			

(\*) EUR 1 000.

*(attach sheets or expand the present table, if necessary)*

#### Reminder:

This data is the result of a proportional calculation done on the 'partnership sheet' for each direct or indirect partner enterprise.

The data entered in the "Total" row of the above table should be entered in line 2 (regarding partner enterprises) of the table in the Annex to the declaration.

## PARTNERSHIP SHEET

### 1. Specific identification of the applicant enterprise

<b>Name or Business Name</b>	_____
<b>Address (or Registered office)</b>	_____
<b>Registration/ VAT number<sup>27</sup></b>	_____
<b>Names and titles of principal directors<sup>28</sup></b>	_____

### 2. Raw data regarding that partner enterprise

Reference period			
	Headcount (AWU)	Annual turnover (*)	Balance sheet total (*)
<b>Raw data</b>	_____	_____	_____
(*) EUR 1 000.			

**Reminder:** These raw data are derived from the accounts and other data of the partner enterprise, consolidated if they exist. To those are added 100% of the data of enterprises which are linked to this partner enterprise, unless the accounts data of those linked enterprises are already included through consolidation in the accounts of the partner enterprise<sup>29</sup>. If necessary, add “linkage sheets” for the enterprises which are not yet included through consolidation.

### 3. Proportional calculation

- a) Precisely indicate the holding<sup>30</sup> of the enterprise drawing up the declaration (or of the linked enterprise via which the relation to the partner enterprise is established) in the partner enterprise to which this sheet relates:

\_\_\_\_\_

\_\_\_\_\_

Also indicate the holding of the partner enterprise to which this sheet relates in the enterprise drawing up the declaration (or in the linked enterprise):

\_\_\_\_\_

\_\_\_\_\_

- b) The higher of these two holding percentages should be applied to the raw data entered in the previous box. The results of this proportional calculation should be given in the following table:

#### Partnership box'

Percentage:	Headcount (AWU)	Annual turnover (*)	Balance sheet total (*)
<b>Proportional results</b>	_____	_____	_____
(*) EUR 1 000.			

<sup>27</sup> To be determined by the Member State according to its needs

<sup>28</sup> Chairman (CEO), Director-General or equivalent.

<sup>29</sup> Definition, Article 6 paragraph 3, first sub-paragraph

<sup>30</sup> In terms of the share of the capital or voting rights, whichever is higher. To this holding should be added the holding of each linked enterprise in the same enterprise (Definition, Article 3 paragraph 2 first sub-paragraph).

These data should be entered in Box A in Annex A.

## ANNEX B

### Linked enterprises

#### DETERMINE THE CASE APPLICABLE TO THE APPLICANT ENTERPRISE:

- ☐ **Case 1:** The applicant enterprise draws up consolidated accounts or is included by consolidation in the consolidated accounts of another enterprise. (Box B(1))
- ☐ **Case 2:** The applicant enterprise or one or more of the linked enterprises do not establish consolidated accounts or are not included in the consolidated accounts. (Box B(2)).

**Please note:** The data of the enterprises, which are linked to the applicant enterprise, are derived from their accounts and their other data, consolidated if they exist. To them are aggregated proportionally the data of any possible partner enterprise of that linked enterprise, situated immediately upstream or downstream from it, unless it has already been included through consolidation<sup>31</sup>.

#### CALCULATION METHODS FOR EACH CASE:

**In case 1:** The consolidated accounts serve as the basis for the calculation. Fill in Box B(1) below.

**Box B(1)**

	<b>Headcount (*)</b>	<b>Annual turnover (**)</b>	<b>Balance sheet total (**)</b>
<b>Total</b>	_____	_____	_____

(\*) Where in the consolidated accounts no headcount data appears, the calculation of it is done by adding the data from the enterprises to which the enterprise in question is linked.

(\*\*) EUR 1 000.

The data entered in the "Total" row of the above table should be entered in line 1 of the table in the Annex to the declaration.

<b>Identification of the enterprises included through consolidation</b>			
<b>Linked enterprise (name / identification)</b>	<b>Address (of registered office)</b>	<b>Registration / VAT number (*)</b>	<b>Names and titles of the principal director(s) (**)</b>
1.			
2.			
3.			
4.			
5.			
6.			
7.			
<b>Total</b>			

(\*) To be determined by the Member State according to its needs

(\*\*) Chairman (CEO), Director-General or equivalent.

<sup>31</sup> Definition, Article 6 paragraph 3, second sub-paragraph



**Important:** Partner enterprises of such a linked enterprise, which are not yet included through consolidation, are treated like direct partners of the applicant enterprise. Their data and a 'partnership sheet' should therefore be added in Annex A.

**In case 2:** For each linked enterprise (including links via other linked enterprises), complete a "linkage sheet" and simply add together the accounts of all the linked enterprises by filling in Box B(2) below.

**Box B(2)**

<b>Enterprise No.:</b>	<b>Headcount (AWU)</b>	<b>Annual turnover (**)</b>	<b>Balance sheet total (**)</b>
<b>1. (*)</b>			
<b>2. (*)</b>			
<b>3. (*)</b>			
<b>Total</b>			

(\*) attach one "linkage sheet" per enterprise

(\*\*) EUR 1 000.

The data entered in the "Total" row of the above table should be entered in line 3 (regarding linked enterprises) of the table in the Annex to the declaration.

## LINKAGE SHEET

(only for linked enterprises not included by consolidation in Box B)

### 1. Precise identification of the applicant enterprise

<b>Name or Business Name</b>	_____
<b>Address (or Registered office)</b>	_____
<b>Registration/ VAT number<sup>32</sup></b>	_____
<b>Names and titles of principal directors<sup>33</sup></b>	_____

### 2. Data on enterprise

<b>Reference period</b>			
	<b>Headcount (AWU)</b>	<b>Annual turnover (*)</b>	<b>Balance sheet total (*)</b>
<b>Total</b>	_____	_____	_____

(\*) EUR 1 000.

These data should be entered in Box B(2) in Annex B.

<sup>32</sup> To be determined by the Member State according to its needs

<sup>33</sup> Chairman (CEO), Director-General or equivalent.

**Important:** The data of the enterprises, which are linked to the applicant enterprise, are derived from their accounts and their other data, consolidated if they exist. To them are aggregated proportionally the data of any possible partner enterprise of that linked enterprise, situated immediately upstream or downstream from it, unless it has already been included through consolidation<sup>34</sup>.

Such partner enterprises are treated like direct partner enterprises of the applicant enterprise. Their data and a 'partnership sheet' have therefore to be added in Annex A.

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<sup>34</sup> If the data of an enterprise are included in the consolidated accounts to a lesser proportion than the one determined under Article 6 paragraph 2, the percentage rate according to that article should be applied (Definition, Article 6 paragraph 3, second sub-paragraph).

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## 2.7. Annex 7: Open Call Bank Account Form

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# ANNEX 7 COORDINATOR BANK ACCOUNT FORM

## Coordinator Bank account information form

## ACCOUNT HOLDER INFORMATION

Account Name Holder The name or title under which the account has been opened and NOT the name of the authorized agent		
Holder's Address		
Postcode		
Town/City		
Country		

Contact Person It does not need to be an authorized agent.		
Email		
Phone		
Mobile Phone		

## BANK ACCOUNT INFORMATION

Bank Name	
Branch Address	
Postcode	
Town/City	
Country	
IBAN number / Account number Format example: ES76 2077 0024 0031 0257 5766	
SWIFT code 8 to 11 characters	

<p>BANK STAMP + SIGNATURE OF BANK REPRESENTATIVE</p>          <p>The bank stamp + signature of bank representative can be substituted by the attachment of a recent bank statement (less than 2 months)</p>	<p>DATE + SIGNATURE OF ACCOUNT HOLDER (<b>OBLIGATORY</b>)</p>          
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## 2.8. Annex 8: Frequently Asked Questions

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# ANNEX 8 FREQUENTLY ASKED QUESTIONS

# 1 INTRODUCTION

The objective of this Frequently Asked Questions (FAQ) document is to provide the XR2LEARN Open Call potential applicants with answers and complementary information to some of the possible questions that may arise when preparing a proposal.

Although this document provides summary information to the listed questions, applicants are advised to consult all annexes and the XR2LEARN F6S blog for detailed information.

This FAQ document is a living document and may be regularly updated with questions and answers that emerge while the open call is running.

## 2 GENERAL AND ELIBILITY QUESTIONS

### 2.1 When is the open call submission deadline?

The XR2LEARN Open Call is announced on June 1<sup>st</sup>, 2023, and it is open for applications from June 29<sup>th</sup>, 2023, till Friday, September 29<sup>th</sup>, 2023, at 17:00 CEST (Brussels time).

### 2.2 Can a University or a Research Centre lead a proposal?

No. A proposal may be submitted by an individual SME or by a small consortium of up to 3 members, having an SME as leader. However, a university or a research centre or a training/educational organization may participate as member of the consortium.

### 2.3 Can an industrial partner not SME lead a proposal?

No. A proposal may be submitted by an individual SME or by a small consortium of up to 3 members, having an SME as leader. However, an industrial partner may participate as member of the consortium.

### 2.4 Can a proposal be submitted by a consortium?

Yes. A proposal may be submitted by an individual SME or by a small consortium of up to 3 members, having an SME as leader. All partners of the consortium should be eligible under the Horizon Europe framework.

### 2.5 Can a start-up apply for the open call?

A start-up may apply for the open call given that they comply with the financial capacity assessment criterion.

### 2.6 Is Financial Stability mandatory?

Yes. Any entity SME or start-up should sign and submit the Annex 6: SME Financial Stability Declaration properly completed and signed, showcasing the SME's financial stability and capacity.<sup>35</sup>

### 2.7 Is the funding provided as lump sum?

Yes. The selected applicants will receive vouchers as they successfully complete each phase or sub-phase.

### 2.8 Is there any equity on XR2LEARN funding?

No. The funds to the selected applicants come directly from the funds of the European Project XR2LEARN, which is funded itself by the European Health And Digital Executive Agency (HADEA), and remain therefore, property of the EU until the payment of the

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<sup>35</sup> Please refer to [https://ec.europa.eu/research/participants/docs/h2020-funding-guide/grants/applying-for-funding/register-an-organisation/financial-capacity-check\\_en.htm](https://ec.europa.eu/research/participants/docs/h2020-funding-guide/grants/applying-for-funding/register-an-organisation/financial-capacity-check_en.htm)



balance, whose management rights have been transferred to the XR2LEARN project coordinator via the European Commission Grant Agreement Number 101092851.

## **2.9 I represent an SME/start-up, which does not have a valid VAT number or PIC number. Can I submit a proposal?**

The European Commission Participant Identification Code (PIC) can be easily obtained<sup>36</sup> and it is mandatory for submitting a proposal. The VAT is mandatory for signing the sub-project contract with the XR2LEARN project coordinator. Failure to provide a valid VAT number at sub-contract signature time will result in application rejection and replacement from the first one in the reserve list. Moreover, any SME/start-up needs to prove its financial stability (please look question 2.6 above).

## **2.10 I had issues with my internet connection and was not able to submit my proposal by the deadline. Can I submit after the 29<sup>th</sup> of September 2023 deadline?**

No. The deadline for proposal submission is September 29<sup>th</sup>, 2023, at 17:00 CEST (Brussels time). No extensions will be granted for any reason, unless a significant problem is identified related to the F6S platform that is unrelated to the applicant. If you experience problems with the F6S platform, report your problem to support@f6s.com. It is highly recommended that you submit your proposal well before September 29<sup>th</sup>, 2023.

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<sup>36</sup> <https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/how-to-participate/participant-register>

## 3 SUBMISSION AND EVALUATION

### 3.1 How do I submit a proposal?

To submit a proposal, you must be registered on F6S ([www.f6s.com](http://www.f6s.com)) and then complete the relevant on-line form accompanied by all required Annexes.

### 3.2 I am not very fluent in English. Can I submit the proposal in another official European Union Language?

No. For transparency reasons all proposals must be written in the English language. Yet, the language capacity is not an evaluation criterion, given that the proposal is readable, and the experts are able to clearly understand the content of the proposal.

### 3.3 I have many innovative ideas in the XR domain. Can I submit multiple proposals?

No. Each applicant may submit only one (1) proposal. Multiple submissions are a disqualifying factor. In case an entity submits more than one proposals, either as an individual entity or via multiple consortia, all proposals that they have submitted or participated in will be automatically excluded from the evaluation process. Moreover, 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. Please check thoroughly the eligibility criteria of Annex 2: “Guide for Applicants”.

### 3.4 What documentation should I include and submit with my proposal?

All documentation must be included as part of the proposal that must be submitted using the XR2LEARN – Open Call #1 F6S page.

It is mandatory to correctly complete and upload

- (1) Annex 4. “Consortium Declaration” completed and signed by ALL consortium members.
- (2) A single file of Annex 5. “Declaration of Honour” completed and signed by ALL consortium members. The relevant pages should be replicated and signed by each consortium partner.
- (3) A single file of Annex 6. “SME Financial Stability” completed and signed by ALL SMEs consortium members. The relevant pages should be replicated and signed by each SME consortium partner.
- (4) A well completed version of Annex 3.1 “Open Call Proposal Supplement”. Please respect the formatting rules and page limit as identified in the template.

All annexes must be uploaded in PDF format.

### 3.5 What are the different evaluation criteria?

All proposals will be evaluated against four criteria, namely:

Criterion 1: Concept and Innovation

Criterion 2: Technology

Criterion 3: Impact

Criterion 4: Applicant Entity/Team

Please refer to Annex 2: “Guide for Applicants” Chapter 4 for more details.

### **3.6 I have an idea on XR technology that is not related to XR2LEARN. How will my proposal be evaluated?**

The XR2LEARN considers XR technology in educational scenarios, which constitutes a broad scope. Yet, it is open to further innovative ideas and technologies on the XR domain given that a) it is feasible to implement, integrate, test and validate that idea within the XR2LEARN project lifetime, b) has a European Dimension and c) there are no security, dual use or ethical issues associated with the proposal.

### **3.7 My proposal scored maximum points (10) on three criteria and four (4) point on one. Is this sufficient to be awarded?**

No. The threshold for each criterion is six (6), while the overall score threshold is twenty-six (26). That means if a proposal receives less than 6 in one criterion or less than 26 overall score it is automatically rejected.

### **3.8 I believe there was an error in the evaluation of my proposal. Can I request for a re-evaluation?**

Yes. You can request for a redress on items solely related to the evaluation or eligibility verification process. A re-evaluation will not call into question the scientific, technical or impact judgement of appropriately qualified experts, but only if there is evidence of a procedural shortcoming that affects the final decision on the proposal. 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 another criterion. Please refer to Annex 2: “Guide for Applicants” Chapter 4.2.5 for more details.

## 4 PROJECT EXECUTION

### 4.1 I received notification that my proposal was awarded. Do I automatically start implementing my sub-project?

No. Additional steps are required before starting the project execution. After applicants are notified of being awarded, the XR2LEARN coordinator will contact the selected applicants to review and finalize the technical, financial and legal requirements of the application.

Then the XR2LEARN coordinator will inform the European Commission and get the permission to start the sub-contract preparation.

It is expected that the sub-project contract will be signed by 30 December 2023, so that the new sub-project may start on 1<sup>st</sup> of January 2024.

### 4.2 Do I have any obligations during the project execution?

A non-exhaustive list of benefits and obligations of the selected consortia members include:

The applicants selected from the Open Call will be published to the XR2LEARN web portal.

All impact creation and dissemination/standardization activities will be included in the XR2LEARN web portal.

Applicants may participate in XR2LEARN activities, including consortium/WP meetings and phone calls, pilot and dissemination activities, reviews from the EC.

Please refer to Annex 2: “Guide for Applicants” section 6 for more detailed list of applicant responsibilities.

#### 4.2.1 Do I have any obligations after the project execution?

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.

The beneficiary shall make available directly to the EC all detailed information and data that may be requested by the EC or any authorised representative, with the aim to verify 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.

Please refer to Annex 2: “Guide for Applicants” section 6 for more detailed list of applicant responsibilities.