



XR2 LEARN

D4.4 OPEN CALL DOCUMENTATION, REPORTS AND ANALYTICS

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TABLE OF CONTENTS

Table of Contents	5
List of abbreviations	6
○ EXECUTIVE SUMMARY	8
1. Introduction	9
1. Key Insights from Open Call #1	10
2. Annexes	12
1.1 Annex 1: Open Call #1	13
1.2 Annex 2: Guide for Applicants	27
1.3 Annex 3.1: Open Call Proposal Supplement	61
1.4 Annex 4: Consortium Declaration	72
1.5 Annex 5: Declaration of Honour	76
1.6 Annex 6: SME Financial Stability	79
1.7 Annex 7: Open Call Bank Account Form	91
1.8 Annex 8: Frequently Asked Questions	93

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

Partners' names and acronyms	
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

○ EXECUTIVE SUMMARY

This report includes information regarding the documentation and design of the second open call that focuses on the piloting of educational XR applications.

The report outlines a list of documents referenced to interested parties to the XR2Learn project and the second open call. The purpose of the documents is to 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.

Additionally, the document includes a section with lessons learnt from the first open call that driven the design of the second open call.

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 means 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 offers two open calls that have different objectives:

- 1) **Open Call #1:** 7 proposals were selected 7-14 to develop XR applications mainly focusing on industry 5.0 technologies, that will enrich the XR2Learn ecosystem. The projects started on M13 (January 2024) and 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 #2 and supply all interested parties with informational content. They can be used as a guide through 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-2/> and submissions are open at the F6S platform: <https://www.f6s.com/xr2learn-open-call-2/apply>.

1. KEY INSIGHTS FROM OPEN CALL #1

The present subsection provides some key insights extracted from the design and execution of the first open call application process. Open Call #1 provided the consortium with valuable experiences and information that were used to optimally design the second open call.

The purpose of the Open Call #1 was to enrich the XR2Learn ecosystem with new educational applications centred around XR technology focusing mainly on applications aligning with industry 5.0 goals. The first call opened on the 29th of June 2023 and closed submissions on the 29th of September 2023.

The call managed to gain a lot of traction, attracting major interest from companies and institutions across Europe. The high interest levels were evident from the large participation on the relevant webinars as well as from the number of threads from participants requiring support through the F6S blog of the call. In total the number of applications submitted to the first open call was 92. Following the eligibility criteria checks 78 out of the 92 applications were accepted. The eligible proposals arrived from 20 different countries while most of the accepted applicants were active in AR/VR and Software.

The large number of applications received was verified by the fulfilment of the KPI 5.3 “*Number of applications submitted to the open calls > 90*”. This indicated the following:

- Open call #1 had a successful campaign that achieved significant outreach on the targeted groups of the call.
- Overall, the call was well-designed and managed to gain the interest of the applicants and the instructions and guidelines were properly documented.
- The support procedures were efficient as they allowed the participants to prepare their applications and submit them. Specifically, having a channel of direct communication with individuals that handled every interaction enhanced the support efforts and decreased the expected workload. Interested parties that required clarifications could find their answers already posted on the F6S blog.

However, the process was not executed without challenges. Particularly, the large number of interested applicants required a lot of effort to be able to appropriately support everyone. Furthermore, the large number of applications required additional effort in the evaluation process.

Moreover, a preliminary analysis of the progress of the open calls has resulted in the following conclusions:

- a) Only a limited number of open call projects have introduced new enablers within the XR2Learn ecosystem.
- b) The projects have engaged a small number of trainees to validate their results.

While these findings are justified in the design of the first open call, considering the delivery timeline of the enablers and the rest of the XR2Learn offerings, it necessitates a different strategy in the second open call. Specifically, in light of KPI 2.2 “Number of enablers developed, contributed and used by third-parties: >10 until M42” and KPI 5.4 “Trainees reached through the piloting of sub-projects > 1000” and in addition to the reviewers’ comment on mandatory use of the educational framework, the marketplace (including IPR features) and the enablers of XR2Learn, the project has decided to

follow the funnel approach in the execution of the second open call in contrast to the first call. The decision to adopt this approach is based on the idea that fostering a kind of competitive environment could aid the project in increasing the outcomes, both quantitative and qualitative, and introducing intermediate control points. The experience of the partners suggests that the funnel approach cultivates healthy competition among the projects, motivating them to perform better and deliver superior results. The strategy is expected to steer/push the OC2 projects towards reaching the goals of the project, such as the aforementioned KPIs.

Detailed information regarding the first open call execution will be reported in D4.2 “XR-application delivery programme” in M26.

Additionally, the XR2Learn consortium shared questionnaires with the open call #1 winners to extract feedback regarding the technical and business supports services provided to them. Feedback was collected from six out of the seven open call projects. The feedback reflected the general satisfaction from the platform and the tools provided, receiving a mean of 7 out of 10 when asked about the satisfaction with the support provided for contributors in the marketplace. Furthermore, the questionnaire provided the consortium with insights about the goals that open call beneficiaries have when uploading the content on the XR2Learn platform, with 100% of the participants reporting “Visibility” as their main goal, and 67% of them reporting “Networking”. Lastly, another insight extracted is the type of content beneficiary contributed to the XR2Learn marketplace. 89% of the beneficiaries have used the platform to upload software, while 67% have used the platform to upload 3D models.

2. ANNEXES

The open call materials of the second call were designed driven by the lessons learnt from the first call along with feedback received from the first open call winners which are outlined in section 2. The basic structure of the provided materials follows the approach of the first call and consists of eight separate documents which are presented in the following subsections. Specifically, they include:

- **Annex 1: XR2Learn Open Call #2**, which provides a brief overview of the project as well as the purpose of the call, with reference to additional information that is expanded in Annex 2. It serves the goal of providing a glimpse into what the second call is about.
- **Annex 2: Guide for Applicants**, as in the first call, it 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**, consists 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.

1.1 Annex 1: Open Call #1



ANNEX 1 XR2LEARN OPEN CALL #2

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XR2LEARN Consortium			
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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 means 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
NFT	Non Fungible Token
ICT	Information and Communications Technology
AR	Augmented Reality
MR	Mixed 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 under the term Extended Reality (XR) - is rising to unprecedented levels. 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 will go beyond offering sound technical and business support for the creation of XR applications for education: XR2Learn will provide access to authoring tools for development of applications through its platform, deliver tools for emotion/affect detection and for automated adaptation of the learning experience to the user needs and emotions, deliver guidance relevant to educational design and use case definition, provide opportunities for piloting and user testing mediated by the large networks brought by XR2Learn partners, promote tools that enable and boost the re-use and sharing of the learning materials/ XR applications, offer business development support and additionally, support IPR management through NFTs enabling novel business model implementation. XR2Learn will support innovators (ICT-SMEs) all the way from ideation to commercialisation offering them tailored business and technical support as well as direct funding.

As a means of enhancing the public awareness, boosting massive adoption and sustainability and ensuring engagement of 3rd parties, XR2Learn will organize 2 open calls and embrace new members in the XR2Learn ecosystem. The objectives of the open calls are:

- a) to increase EU competitiveness in the XR application market focusing on support to SMEs,
- b) to accelerate XR application design and development for education/training,
- c) to motivate collaboration between XR developers and education experts and
- d) to reduce the cost of XR educational applications development and
- e) to engage educational institutions and XR applications developers, stakeholders, decision makers to utilize the XR2Learn tools and make the XR2Learn ecosystem sustainable.

XR2Learn will organize **two** open calls (OCs) with different goals each time:

The **1st Open Call** aims to **extend XR2Learn scope and deliver novel XR-based applications primarily targeting the manufacturing domain**. It will open in July 2023 and run for 3 full months. Selected projects will start in January 2024 and run for 12 months.

The **2nd Open Call** aims to **perform test, piloting, evaluate and validate user acceptance of new or already developed XR-based applications**. It will open in October 2024 and run for 3 full months. Selected projects will start in April 2025 and run for 12 months.

This is the XR2Learn Open Call #2 implementation. The total amount of funding that will be provided at Open Call#2 is **€2,100,000**. Each accepted sub-project may receive **€30,000 to €300,000** (100% funding as lump sum). As such, it is expected that **10 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**.

Small consortia of up to three partners consisting of XR-developing industrial partners, training organizations and XR-application user/adopters are eligible for applying. The project coordinator should be an SMEs, while SMEs, mid-caps or research institutions, research organizations and educational or training actors including private and public entities, eligible for Horizon Europe calls will be eligible to participate as members in a single proposal, except for the consortium's beneficiaries and parties that may have conflicts of interest. More details are available at section 1.2 Open Call #2 Details.

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 in the **XR2Learn community**
- render the XR2Learn platform as a **unique entry point to XR for education applications**
- create a **holistic offering** including technical and business support services to attract the best-of-the-best SMEs, mid-caps and Universities, Academic and Training Organizations that are capable of developing novel XR applications
- organise activities to **push technologies** and ideas to the created XR/Educational community
- organise open calls to engage the audience, **pull back results** and enable all actors to experience the **benefits of participation in this community**.

With respect to the provided technology, the XR2Learn consortium is:

a) developing three open-source XR-based applications, “PUSHing” XR technologies to the target audiences. These applications will be showcased in dedicated workshops, capitalising on technologies already available through XR2Learn partners to ensure a fast jump start. All three applications will be available to tailoring or for serving as basis for other application development by 3rd parties;

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

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

d) stimulating SMEs and educational/training organizations to develop **novel solutions exploiting XR technologies** i.e. **PULLing** smart solutions and to pilot novel XR-based solutions adopting the methodology suggested by XR2Learn so that they gather meaningful feedback.

XR2Learn provides tools, building blocks, and best practices to the XR2Learn community through its platform. To enable both learners and creators to evaluate the full potential of XR technologies for their specific industrial training use cases, XR2Learn offers Beacon Applications and Enablers as starting points to create and enhance their training scenarios and solutions. The implementation of these tools is publicly available in the [HYPERLINK "https://github.com/orgs/XR2Learn/repositories"](https://github.com/orgs/XR2Learn/repositories), supported by appropriate documentation., supported by appropriate documentation.

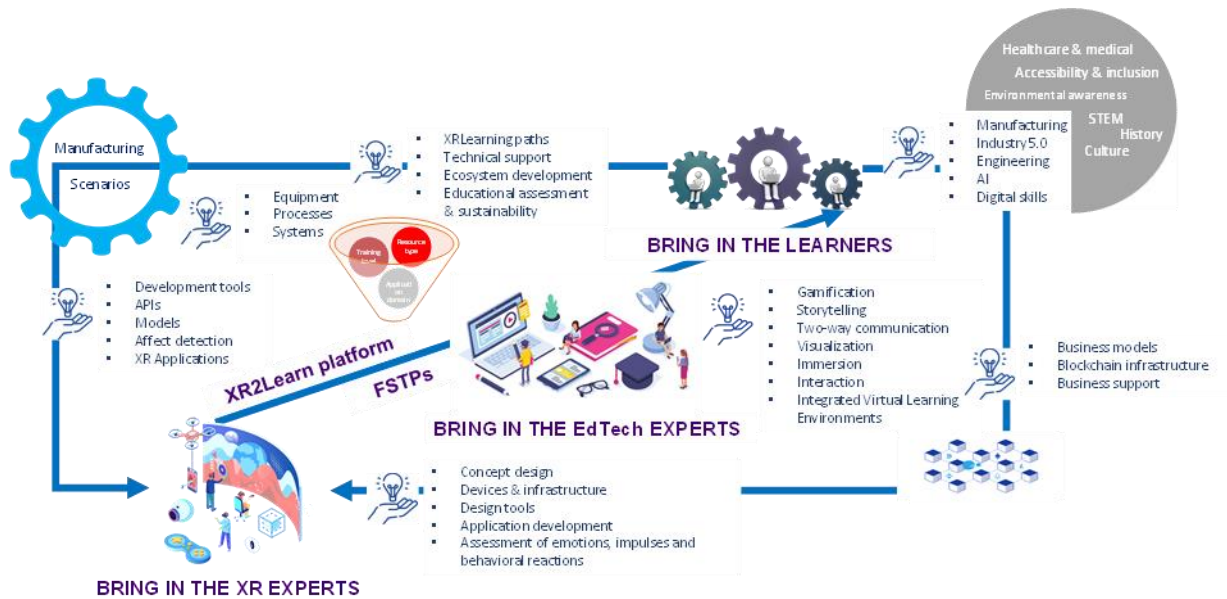


Figure 1: XR2Learn concept and overall value chain for delivering innovative services to stakeholders

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). XR2Learn will deliver its platform organised as a Digital Innovation Hub, which act as one-stop-shop, offering both technological and business services and connect that are interested in delivering XR apps in the educational sector with instructional designers, decision makers and end-users resources as well as with other auxiliary yet mandatory competencies (such as business) required to create results with a product/market fit. This is a win-win situation through which XR2Learn fosters customer-business-market oriented product development and harvests the fruits and at the same time feeds back the continuous needs for learning/training of our 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 obligations¹

¹ More information at https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/horizon/guidance/programme-guide_horizon_en.pdf

1.3 XR2LEARN Open Call#2 Details

This is the implementation of the 2nd Open Call of the XR2Learn project. The following details apply to the call:

- Each accepted sub-project may receive **between €30,000 and €300,000 funding**.
- **The total amount of funding that will be provided at this call is €2,100,000.** It is expected that **10 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.
- **An application may be submitted by a small consortium of up to 3 members in total** to pilot new or existing XR-application in real life settings. The Project Leader/Coordinator must be an SME, while the participation of a **training providing organization (private or public) is mandatory**. The inclusion in the consortium as a member of a potential user/ early adopter, especially in the application pilot 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 for the XR2Learn evaluation.
- 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 7 (**TRL > 7**)², while Market Readiness Level (MRL) 4 or higher (**MLR ≥ 4**) is targeted³.

Each sub-project is organised in three (3) phases (Pilot SPECIFICATION, EXECUTION and GROWTH) associated with relevant payments directly linked to deliverables as shown in the following figure and may run for 12 months (1/4/2025 – 31/03/2026) as shown in the next table






Figure 2: XR2LEARN Open Call#2 Phases

² TRL 7 corresponds to “system prototype demonstration in operational environment”

³ MLR 4 indicates that the application is tested with early adopters at small scale

Table 1. Details of the XR2Learn Open Call #2 Phases

Phase	Overview
<p data-bbox="225 477 456 506">SPECIFICATION</p> 	<ul style="list-style-type: none"> ● <i>Duration:</i> 3 months, the consortium will work remotely and occasionally participate in integration and testing activities ● <i>Activities:</i> The consortium will build/fine-tune their application concept, perform additional development/customization to utilize the XR2Learn technology, prepare a detailed pilot specification deliverable and a tech-business presentation ● <i>Funding:</i> ten (10) projects will be selected to get €30.000 (lump sum) each, associated to successful completion of the Pilot Specification, assessed by external reviewers.
<p data-bbox="256 869 424 898">EXECUTION</p> 	<ul style="list-style-type: none"> ● <i>Duration:</i> 7 months, the consortium will work remotely and participate in pilot execution activities ● <i>Activities:</i> The consortium will be performing pilot execution with real end users and validate the developed application. Delivery of open-source versions of tools and/or applications (under proper license) will also be favoured. ● <i>Funding:</i> eight (8) projects will be selected to get €200.000 (lump sum) each, associated to successful completion of the Pilot Execution phase, assessed by external reviewers.
<p data-bbox="272 1294 408 1323">GROWTH</p> 	<ul style="list-style-type: none"> ● <i>Duration:</i> 2 months, the consortium will participate in several meetings and events where they can promote their projects goals and outcomes ● <i>Activities:</i> The consortium will realize activities associated with replication analysis, promotion and exploitation of their project, aiming to engage new customers and/or partners and/or investors. ● <i>Funding:</i> three (3) projects will be selected to get €65.000 (lump sum) each, associated to successful completion of the GROWTH/Market Readiness phase, assessed by external reviewers. Additional €5.000 will be provided as a prize to the best performing project.

As shown in Figure 3, the Open Call #2 selection will follow a **funnel approach**, which will help the XR2Learn consortium to focus on the top projects along the programme.

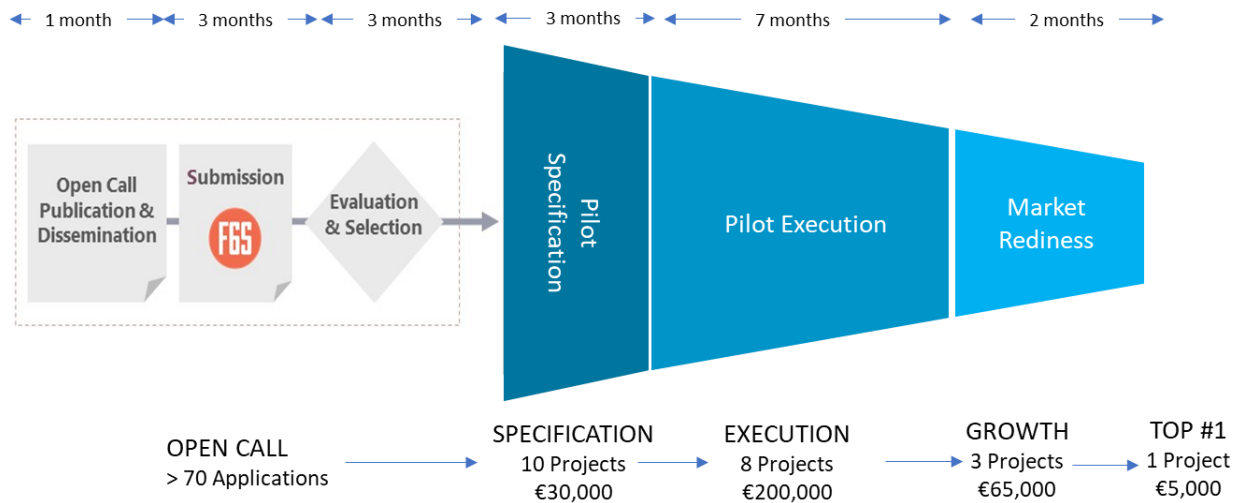


Figure 3: XR2Learn Overall process

The selected 10 SMEs from the Open Call #2 are first challenged to provide Application Customization/ Adaptation, Pilot Specification and a sound business plan that are presented at the end of the **SPECIFICATION phase**. These are filtered and the top eight (8) move on to the Pilot **EXECUTION phase**. They will be performing pilot execution with real end users, validate the developed application and provide a business plan, which are used to evaluate/select the top three (3) sub-projects towards the **GROWTH phase**. In the end the **Top #1** sub-project will be selected to receive an additional prize of €5,000. This structured approach allows the best and most promising applications to achieve growth and market uptake.

The full set of information regarding the Open Call #2 for Proposals for the XR2Learn project can be found in Annex 2: Guide for Applicants. Annex 1, Annex 3.1, Annex 4, Annex 5, Annex 6 and Annex 7 should also be considered for the submission of a Proposal.

1.4 General Funding Rules

The following rules apply to the project funding:

- Each accepted sub-project may receive funding between **€30,000** 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 **each phase at least 60%** of the funding. Universities, academic, teaching or research organisations will get **up to 40%** of the total funding at each phase.
- 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 #2 is **€2,100,000** and the expected number of accepted projects will be 10. **In case there is a leftover, a hackathon will be organised to attract the interest of entrepreneurs/ innovators in the XR-technology sector.**

The selected SMEs will be funded as follows⁴:

Table 2 XR2Learn funding schema

Number of consortia	Funding (in EUROS)	When (in Month)	Condition / Event
10	30.000	3	After successfully completing the SPECIFICATION phase.
8	100.000	6	After successful evaluation of the 1 st phase of the Pilot (mid Pilot EXECUTION phase)
8	100.000	10	After successful evaluation of the 2 nd phase of the Pilot results and the business plan (Pilot EXECUTION phase)
3	65.000	12	After success demonstration of the product (at TRL 7 or higher) and the dissemination (Market Readiness/GROWTH phase)
1	5.000	12	One project will be selected as Top#1 to get additional a voucher of €5.000 as prize

1.5 Timeline – Open Call #2

Submission to the Open Call #2 will be enabled on **Friday 27th of September 2024** and will end on **Friday 27th of December 2024 at 17:00CET time (Brussels time)**. Selected projects are expected to start on **1st of April 2025**. Below are presented the dates for the different phases. The opening and closing dates of each phase can be subject to change in case of any modifications in the project's schedule.

⁴ It should be noticed that the delivery of the funding to the applicants heavily depends on the availability of the relevant funding provided by the EC to the XR2Learn project coordinator, and delays should be expected.

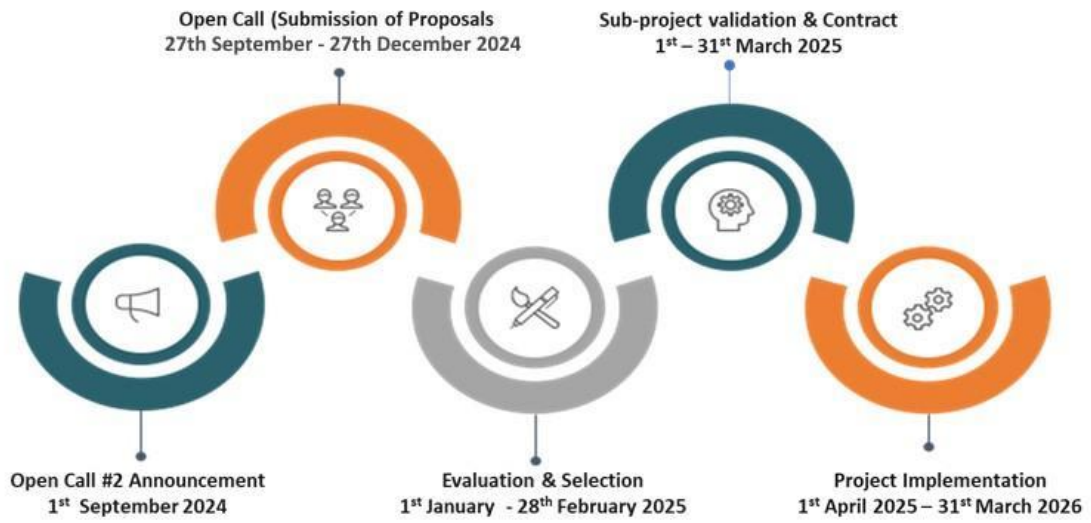


Figure 4: XR2Learn Open Call #2 timeline

2 OPEN CALL OVERVIEW

Table 3 provides a summary of the XR2LEARN Open Call #2.

Table 3: Details of the XR2LEARN Open Call #2

Open Call item Information	Open Call item Information
Call title:	XR2LEARN – Open Call #2
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 st September 2024
Call deadline:	27 th December 2024
Expected duration of participation:	12 months (1 st April 2025 – 30 th March 2026)
Total EU funding available (Open Call #2):	€ 2,100,000
Submission & evaluation process:	<p>The objective of the XR2LEARN – Open Call #2 is to perform test, piloting, evaluate and validate the user acceptance of new or already developed XR-based applications within the XR2LEARN ecosystem, 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 a small consortium of up to 3 members in total. The Project Leader/ Coordinator must be an SME. The participation of a training provider organization (private or public) is mandatory. 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 €30,000 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 least 60% of the total funding.</p> <p>Submissions are available via https://www.f6s.com/xr2learn-open-call-2/apply</p>
Further information:	Details available at https://xr2learn.eu/open-call-2/

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-2/>

Apply via: <https://www.f6s.com/xr2learn-open-call-2/apply>

F6S support team: support@f6s.com

Online Q&A: <https://www.f6s.com/xr2learn-open-call-2/discuss>

Other support⁵: opencalls@xr2learn.eu

⁵ For non-binding information

4 REFERENCES

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- [2] European Commission, “SME Definition Guide,” [Online]. Available: http://ec.europa.eu/enterprise/policies/sme/files/sme_definition/sme_user_guide_en.pdf .
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1.2 Annex 2: Guide for Applicants



ANNEX 2 OPEN CALL #2 GUIDE FOR APPLICANTS

SEPTEMBER 2024

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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	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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Table of Contents

List of Abbreviations and Acronyms

5

<u>1</u>	32
<u>1.1</u>	33
<u>1.2</u>	34
<u>1.3</u>	36
<u>1.4</u>	37
<u>2</u>	38
<u>2.1</u>	38
<u>2.2</u>	38
<u>2.3</u>	38
<u>2.4</u>	38
<u>2.5</u>	38
<u>3</u>	39
<u>3.1</u>	39
<u>3.2</u>	39
<u>3.3</u>	39
<u>4</u>	41
<u>4.1</u>	41
<u>4.1.1</u>	41
<u>4.1.2</u>	42
<u>4.1.3</u>	42
<u>4.1.4</u>	42
<u>4.2</u>	43
<u>4.2.1</u>	43
<u>4.2.2</u>	43
<u>4.2.3</u>	44
<u>4.2.4</u>	45
<u>4.2.5</u>	46
<u>5</u>	48
<u>5.1</u>	48
<u>5.2</u>	48
<u>5.3</u>	49
<u>5.4</u>	49
<u>6</u>	50
<u>6.1</u>	50
<u>6.2</u>	50
<u>6.3</u>	50
<u>6.4</u>	51
<u>6.5</u>	52
<u>7</u>	52
<u>7.1</u>	52
<u>7.2</u>	53
<u>8</u>	54
<u>8.1</u>	54

8.2	54
8.3	54
8.4	55
8.5	56
9	58
10	59
11	60

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
NFT	Non Fungible Token
ICT	Information and Communications Technology
AR	Augmented Reality
MR	Mixed 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 under the term Extended Reality (XR) - is rising to unprecedented levels. 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 will go beyond offering sound technical and business support for the creation of XR applications for education: XR2Learn will provide access to authoring tools for development of applications through its platform, deliver tools for emotion/affect detection and for automated adaptation of the learning experience to the user needs and emotions, deliver guidance relevant to educational design and use case definition, provide opportunities for piloting and user testing mediated by the large networks brought by XR2Learn partners, promote tools that enable and boost the re-use and sharing of the learning materials/ XR applications, offer business development support and additionally, support IPR management through NFTs enabling novel business model implementation. XR2Learn will support innovators (ICT-SMEs) all the way from ideation to commercialisation offering them tailored business and technical support as well as direct funding.

As a mean of enhancing the public awareness, boosting massive adoption and sustainability and ensuring engagement of 3rd parties, XR2Learn will organize 2 open calls and embrace new members in the XR2Learn ecosystem. The objectives of the open calls are:

- a) to increase EU competitiveness in the XR application market focusing on support to SMEs,
- b) to accelerate XR application design and development for education/training,
- c) to motivate collaboration between XR developers and education experts and
- 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 **1st Open Call** aims to **extend XR2Learn scope and deliver novel XR-based applications primarily targeting the manufacturing domain**. It will open in July 2023 and run for 3 full months. Selected projects will start in January 2024 and run for 12 months.

The **2nd Open Call** aims to **perform test, piloting, evaluate and validate user acceptance of new or already developed XR-based applications**. It will open in October 2024 and run for 3 full months. Selected projects will start in April 2025 and run for 12 months.

This is the XR2Learn Open Call #2 implementation. The total amount of funding that will be provided at Open Call#2 is **€2,100,000**. Each accepted sub-project may receive **€30,000 to €300,000** (100% funding as lump sum). As such, it is expected that **10 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**.

Small consortia of up to three partners consisting of XR-developing industrial partners, training organizations and XR-application user/adopters are eligible for applying. The project coordinator should be an SMEs, while SMEs, mid-caps or research institutions, research organizations and educational or training actors including private and public entities, eligible for Horizon Europe calls will be eligible to participate as members in a single proposal, except for the consortium's beneficiaries and parties that may have conflicts of interest. More details are available at section 1.2 Open Call #2 Details.

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 in the **XR2Learn community**
- render the XR2Learn platform as a **unique entry point to XR for education applications**
- create a **holistic offering** including technical and business support services to attract the best-of-the-best SMEs, mid-caps and Universities, Academic and Training Organizations that are 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 participation in this community**.

With respect to the provided technology, the XR2Learn consortium is:

a) developing three open-source XR-based applications, “PUSHing” XR technologies to the target audiences. These applications will be showcased in dedicated workshops, capitalising on technologies already available through XR2Learn partners to ensure a fast jump start. All three applications will be available to tailoring or for serving as basis for other application development by 3rd parties;

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

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

d) stimulating SMEs and educational/training organizations to develop **novel solutions exploiting XR technologies** i.e. **PULLing** smart solutions and to pilot novel XR-based solutions adopting the methodology suggested by XR2Learn so that they gather meaningful feedback.

XR2Learn provides tools, building blocks, and best practices to the XR2Learn community through its platform. To enable both learners and creators to evaluate the full potential of XR technologies for their specific industrial training use cases, XR2Learn offers Beacon Applications and Enablers as starting points to create and enhance their training scenarios and solutions. The implementation of these tools is publicly available in the [project's GitHub repository](#), supported by appropriate documentation.

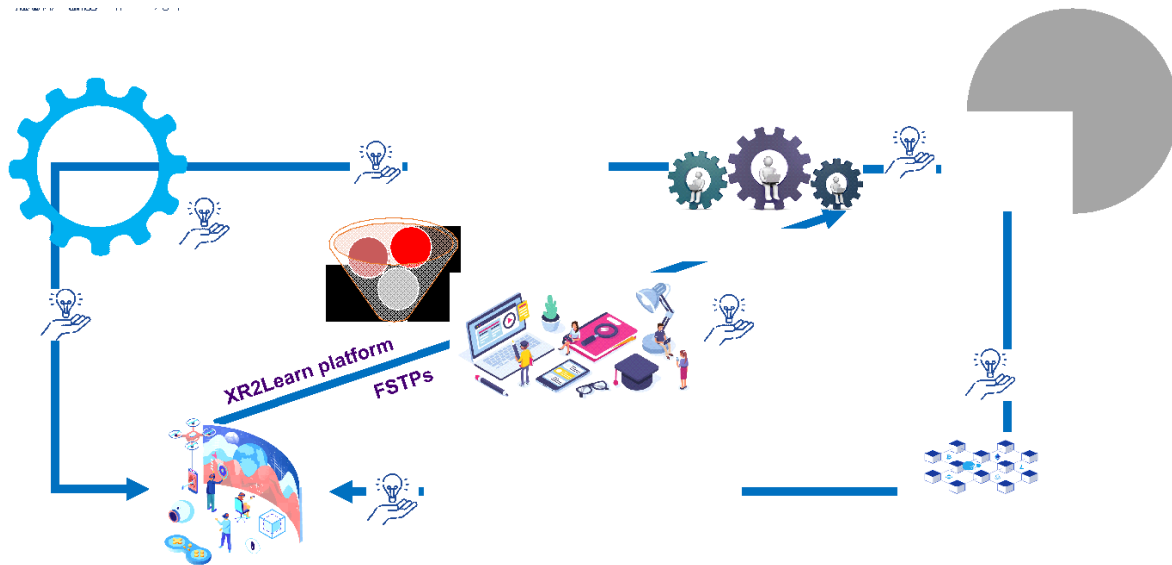


Figure 1: XR2Learn concept and overall value chain for delivering innovative services to stakeholders

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). XR2Learn will deliver its platform organised as a Digital Innovation Hub, which act as one-stop-shop, offering both technological and business services and connect that are interested in delivering XR apps in the educational sector with instructional designers, decision makers and end-users resources as well as with other auxiliary yet mandatory competencies (such as business) required to create results with a product/market fit. This is a win-win situation through which XR2Learn fosters customer-business-market oriented product development and harvests the fruits and at the same time feeds back the continuous needs for learning/training of our knowledge societies.

1.2 XR2Learn Open Call#2 Details

This is the implementation of the 2nd Open Call of the XR2Learn project. The following details apply to the call:

- Each accepted sub-project may receive **between €30,000 and €300,000 funding**.
- **The total amount of funding that will be provided at this call is €2,100,000.** It is expected that **10 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.
- **An application may be submitted by a small consortium of up to 3 members in total** to pilot new or existing XR-application in real life settings. The Project Leader/Coordinator must be an SME, while the participation of a **training providing organization (private or public) is mandatory**. The inclusion in the consortium as a member of a potential user/ early adopter, especially in the application pilot 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 for the XR2Learn evaluation.
- 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 7




(TRL > 7)⁶, while Market Readiness Level (MRL) 4 or higher (MLR ≥ 4) is targeted⁷.

Each sub-project is organised in three (3) phases (Pilot SPECIFICATION, EXECUTION and GROWTH) associated with relevant payments directly linked to deliverables as shown in the following figure and may run for 12 months (1/4/2025 – 31/03/2026) as shown in the next table



Figure 2: XR2Learn Open Call#2 Phases

Table 1. Details of the XR2Learn Open Call #2 Phases

Phase	Overview
<p style="text-align: center;">SPECIFICATION</p> 	<ul style="list-style-type: none"> ● <i>Duration:</i> 3 months, the consortium will work remotely and occasionally participate in integration and testing activities ● <i>Activities:</i> The consortium will build/fine-tune their application concept, perform additional development/customization to utilize the XR2Learn technology, prepare a detailed pilot specification deliverable and a tech-business presentation ● <i>Funding:</i> ten (10) projects will be selected to get €30.000 (lump sum) each, associated to successful completion of the Pilot Specification, assessed by external reviewers.
<p style="text-align: center;">EXECUTION</p> 	<ul style="list-style-type: none"> ● <i>Duration:</i> 7 months, the consortium will work remotely and participate in pilot execution activities ● <i>Activities:</i> The consortium will be performing pilot execution with real end users and validate the developed application. Delivery of open-source versions of tools and/or applications (under proper license) will also be favoured. ● <i>Funding:</i> eight (8) projects will be selected to get €200.000 (lump sum) each, associated to successful completion of the Pilot Execution phase, assessed by external reviewers.
<p style="text-align: center;">GROWTH</p> 	<ul style="list-style-type: none"> ● <i>Duration:</i> 2 months, the consortium will participate in several meetings and events where they can promote their projects goals and outcomes ● <i>Activities:</i> The consortium will realize activities associated with replication analysis, promotion and exploitation of their project, aiming to engage new customers and/or partners and/or investors. ● <i>Funding:</i> three (3) projects will be selected to get €65.000 (lump sum) each, associated to successful completion of the GROWTH/Market Readiness phase, assessed by external reviewers. Additional €5.000 will be provided as a prize to the best performing project.

⁶ TRL 7 corresponds to “system prototype demonstration in operational environment”

⁷ MLR 4 indicates that the application is tested with early adopters at small scale

As shown in Figure 3, the Open Call #2 selection will follow a **funnel approach**, which will help the XR2Learn consortium to focus on the top projects along the programme.

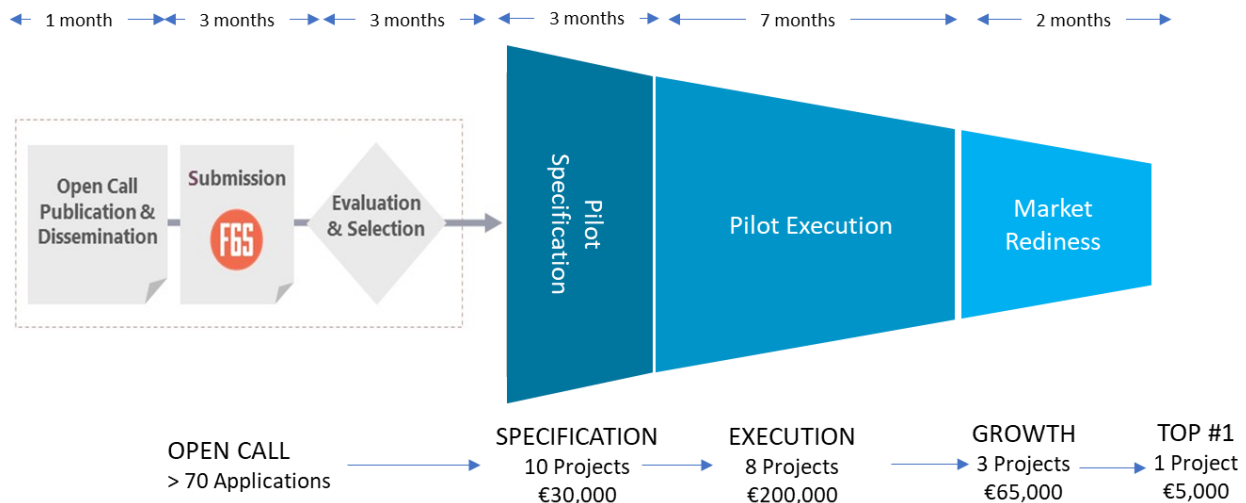


Figure 3: XR2Learn Overall process

The selected 10 SMEs from the Open Call #2 are first challenged to provide Application Customization/ Adaptation, Pilot Specification and a sound business plan that are presented at the end of the **SPECIFICATION phase**. These are filtered and the top eight (8) move on to the Pilot **EXECUTION phase**. They will be performing pilot execution with real end users, validate the developed application and provide a business plan, which are used to evaluate/select the top three (3) sub-projects towards the **GROWTH phase**. In the end the **Top #1** sub-project will be selected to receive an additional prize of €5,000. This structured approach allows the best and most promising applications to achieve growth and market uptake.

This document provides a full set of information regarding the Open Call #2 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 **€30,000** 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 **each phase at least 60%** of the funding. Universities, academic, teaching or research organisations will get **up to 40%** of the total funding at each phase.
- 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 #2 is **€2,100,000** and the expected number of accepted projects will be 10. **In case there is a leftover, a hackathon will be organised to attract the interest of entrepreneurs/ innovators in the XR-technology sector.**

The selected SMEs will be funded as follows⁸:

⁸ It should be noticed that the delivery of the funding to the applicants heavily depends on the availability of the relevant funding provided by the EC to the XR2Learn project coordinator, and delays should be expected.

Table 2 XR2Learn funding schema

Number of consortia	Funding (in EUROS)	When (in Month)	Condition / Event
10	30.000	3	After successfully completing the SPECIFICATION phase.
8	100.000	6	After successful evaluation of the 1 st phase of the Pilot (mid Pilot EXECUTION phase)
8	100.000	10	After successful evaluation of the 2 nd phase of the Pilot results and the business plan (Pilot EXECUTION phase)
3	65.000	12	After success demonstration of the product (at TRL 7 or higher) and the dissemination (Market Readiness/GROWTH phase)
1	5.000	12	One project will be selected as Top#1 to get additional a voucher of €5.000 as prize

1.4 Timeline – Open Call #2

Submission to the Open Call #2 will be enabled on **Friday 27th of September 2024** and will end on **Friday 27th of December 2024 at 17:00CET time (Brussels time)**. Selected projects are expected to start on **1st of April 2025**. Below are presented the dates for the different phases. The opening and closing dates of each phase can be subject to change in case of any modifications in the project’s schedule.

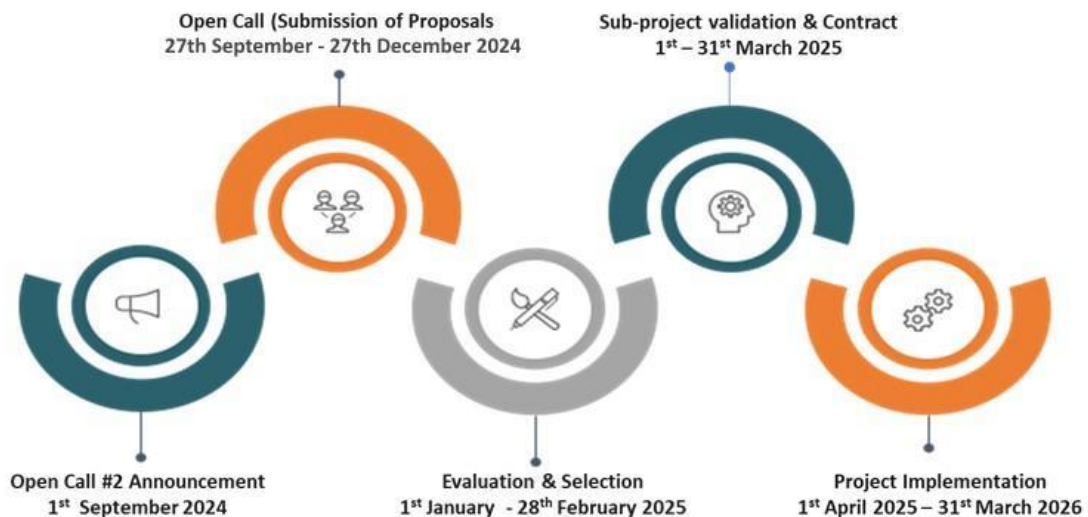


Figure 3: XR2Learn Open Call #2 timeline

2 GENERAL INFORMATION

2.1 Means of submission

The F6S platform (<https://www.f6s.com/XR2Learn/>) will be the entry point for all proposals' submission to the 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 XR2Learn consortium during the sub-granted projects execution.

2.2 Language

English is the only official language for 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 deliverable will 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 selected proposer will be associated with the XR2Learn consortium via a sub-project contract, while via signing the XR2Learn Consortium Agreement they will have access to the XR2Learn benefits and rules.

The funds to the selected applicants come directly from the funds of the European Project XR2Learn, funded itself by under the EC Horizon Europe Framework Programme (HORIZON), and remain therefore, property of the EU 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.

This relation between the new partners and the EC carries a set of obligations⁹.

⁹ More information at https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/horizon/guidance/programme-guide_horizon_en.pdf

3 PROPOSAL ELIGIBILITY CRITERIA

XR2Learn invites 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 complying with the European Commission Recommendation 2003/361/EC [1] and the SME user guide [2]. As a summary, the criteria which define an SME are:

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

3.2 SME Eligibility Criteria

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

- i. It is a legal entity, that comply to the SME definition as defined in section 3.1¹⁰
- ii. It is established and based in one of the EU Member States or a Horizon Associated country as defined in Horizon Rules for participation [3]
- iii. It is an IT technology provider, such as XR tools, XR applications and services.
- iv. Applicants should be able to prove their financial stability and capacity and pass any financial check required by the European Commission, including **Financial capacity assessment** [4]. Moreover, the SMEs should take into consideration that all funds are directly associated with the XR2Learn project funding and any funding issue, including delays, in the XR2Learn project financing is directly applied to the selected Open Call applicants/ sub-contracts.
- v. In case an SME is awarded a sub-contract, it will remain eligible even if, at a certain point during the project execution, it does not fulfil criteria (b) or (c) of section 3.1.
- vi. Have not been convicted for fraudulent behaviours, other financial irregularities, unethical or illegal business practices.
- vii. Are not under liquidation or an enterprise under difficulty accordingly to the Commission Regulation No 651/2014 art. 2.18.

3.3 Proposal specific Eligibility Criteria

The following proposal's eligibility criteria also apply:

- i. Proposals must offer technological XR pilots and experimentation such as **piloting of XR applications targeting educational scenarios**.
- ii. Proposals must have a **clear European dimension** and contribute towards EU digitization, **targeting clear economic and societal impact**.
- iii. The application must be submitted by **a small consortium of up to 3 members. The project Leader/ Coordinator must be an SME**. The participation of a **training provider organization (private or public) is mandatory**. Inclusion in the consortium as a member of a **potential user/ early adopter** may be a plus (although not mandatory).
- iv. The requested funding per proposal will be between **€30,000** and **€300,000**. Each participant legal entity may receive between **€60,000** and **€200,000**. All partners are

¹⁰ 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/>

funded at **100% (lump sum)**. The total funding for the industrial partners should be at least **60%** of the requested funding at each project phase, while academic, teaching or research organisations request up to **40%** of the total funding at each project phase.

- v. **Each legal entity may participate in only one (1) proposal at each XR2Learn open call.** If a legal entity participates, in any direct or indirect way in multiple submissions, all associated proposals are automatically disqualified and will be automatically excluded from the evaluation process.
- vi. **It is considered as Conflict of Interest and the relevant proposals will be automatically considered not eligible, in case an individual participates, controls, submits or is associated in any way with more than one proposal.** As indicative example, without excluding other cases, it is not allowed for an individual to be in the project team or the advisory board of more than one proposal. Moreover, it is not allowed for an individual to have a legal, administrative, technical, advisory or financial position or capacity in more than one applicant or is in the position to access or influence in any way more than one proposal.
- vii. **Any legal entity may participate in maximum one (1) accepted application.** Applicants that have been accepted via Open Call #1 are automatically excluded from participating in Open Call #2 even if they submit a different proposal or form a different consortium and the proposal will be automatically rejected.

Please note that a 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 #2 targets XR application developers to customize/adapt and pilot XR applications based on the XR2Learn project developments. The following figure summarizes the open call process:

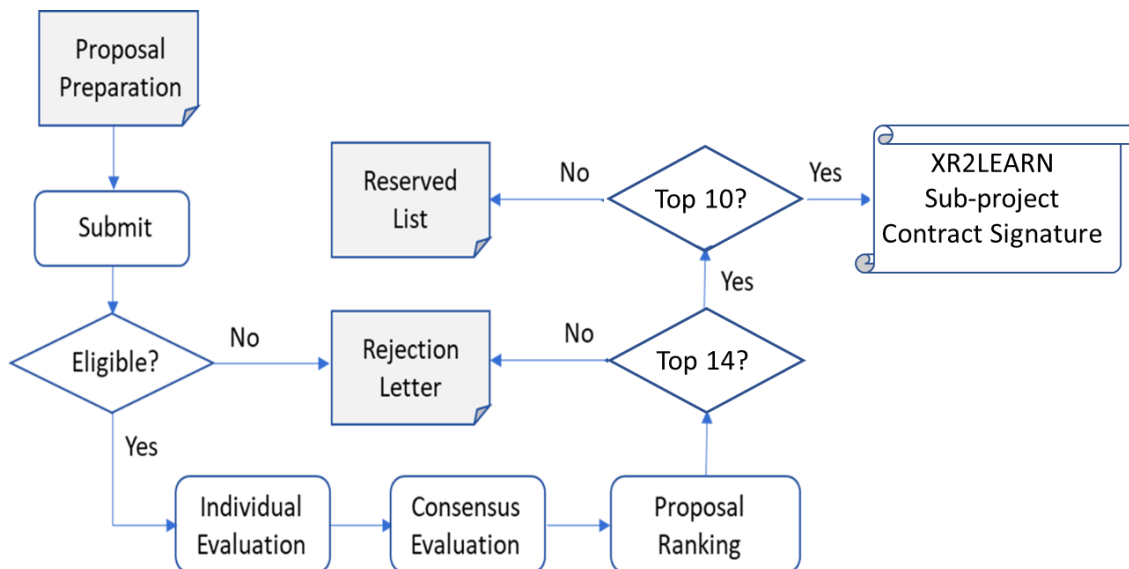


Figure 4: XR2Learn Evaluation process summary

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 4.2.2 below. Based on the evaluation criteria defined in section 4.2.3, the proposals will be ranked and then the top 14 proposals will be selected. The contract signature process will be initiated for the top 10 proposals, while four (4) additional proposals that have ranked just below the selected 10, will be kept at the reservation list in case one of the top 10 proposals fail during the sub-contract preparation phase.

4.1 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 #2 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-2>).
- **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.

4.1.2 Applicants Registration

Interested applicants should register at the XR2Learn F6S page (<https://www.f6s.com/XR2Learn-open-call-2/apply>). This will be the central interface for managing the proposal applications for the remainder of the open calls.

4.1.3 Proposal Preparation

Please follow the steps:

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

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

4.1.4 Proposals reception

Submissions will be done ONLY via the F6S platform on <https://www.f6s.com/XR2Learn-open-call-2/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 Tuesday 27th of December 2024**. 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. Eligibility criteria check will verify that:

- a. The proposing entity is a legal entity eligible for EC funding under the rules of Horizon Europe [Y/N]
- b. The participation rules as expressed in **§3.2 "SME Eligibility Criteria"** are followed for all industrial partners of the consortium [Y/N]
- c. The participation rules as expressed in **§3.3 "Proposal specific Eligibility Criteria"** are followed [Y/N]
- d. The proposal and all associated documents are written in the English Language [Y/N]
- e. All required annexes i.e. **Annex 3.1, Annex 4, Annex 5** and **Annex 6** are correctly completed, signed, stamped and submitted [Y/N]
- f. Table "Application in Numbers" in Annex 3.1 Cover Page is fully completed [Y/N]
- g. Use at least one of the existing XR2Learn Enabler [Y/N]
- h. Provide a new enabler or a Beacon Application [Y/N]

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

4.2.2 Step 1.2: External remote evaluation

Two (2) evaluators external to XR2Learn consortium with experience in XR technologies, education and business development will evaluate each proposal, scoring it based on the following evaluation criteria:

Table 2: XR2Learn Open Call #2 applications evaluation Criteria

Criteria	Description
Criterion 1: Concept and Innovation	<ul style="list-style-type: none"> ● Innovation, novelty and feasibility of the proposed XR Pilot objectives. ● Design, reliability, feasibility, and quality of the proposed XR pilot. ● Level of innovation and technological challenges addressed. ● Applicability to the XR and education scenarios. ● Number of VR models for educational applications provided through the XR2Learn platform ● Number of complete educational applications/tools provided through the XR2Learn platform ● Applicability to Industry 5.0 technologies domain.
Criterion Technology	<ul style="list-style-type: none"> ● 2: Analysis of the technological and implementation capacity (existing and target TRL and MRL).

- Quality and feasibility of the workplan (including proposed milestones).
 - Quality of the alignment with the XR2Learn project.
 - Justified utilization of XR2Learn technology, such as application of existing XR2Learn Enablers.
 - Utilization of the XR2Learn educational framework.
 - Details on how the proposed components will be tested and validated and trainees (including gender balance) reached through the piloting of sub-projects
 - Economic and societal impact of the proposed subsystem.
 - Market potential and go to market strategy.
- Criterion 3: Impact**
- European dimension, cross-sector/-border business scalability.
 - Exploitation / business plan and commercialization milestones.
 - Offering of the application as open source or not.
 - Capacity to applicant entity/team to perform the task.
- Criterion Applicant Entity/Team**
- 4: ● Knowledge, technological and business expertise.
 - Financial viability/stability and capacity.
 - Commitment of the company and the team.
 - Allocation and justification of requested resources.

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

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

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

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

4.2.3 Step 1.3: Ranking and Selection Procedure

Within Open Call#2 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 technologies¹¹. The selection of the projects to be funded will be based on the following procedure:

¹¹ 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.

- **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, ten (10) proposals will be selected, while four (4) additional proposals will remain in a reserve list. In case one of more selected proposals fail during contract preparation, the list of accepted proposals will be filled with proposals from the reserve list.

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

4.2.4 Step 1.4: Contract Preparation & Signature

After the Open Call evaluation conclusion and projects selection, the XR2Learn coordinator will inform the EU for 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 an administrative and financial checking (and potentially into technical or ethical/ security negotiations) based on evaluators' comments. On a case-by-case approach, at least one phone call or teleconference between the XR2Learn coordinator and the sub-project coordinator may be needed for clarification.

The objective of the contract preparation is fulfilling the legal requirements between the European Commission, the XR2Learn consortium and every beneficiary/consortium member of the selected sub-project. The items covered will be:

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

It should be emphasised that each **SME should provide at contract preparation time a valid VAT¹². Failure to provide the VAT number will automatically result in proposal rejection.**

In general, the contract preparation (including all the above documentation) should be concluded within 2 weeks. One additional week may be provided by the XR2Learn coordinator in case of a significant reasoning. In case negotiations have not been concluded within the above period, the proposal is automatically rejected and the next proposal in the reserve list is invited.

The provided funding remains property of the European Commission until the payment of the balance, whose management rights have been transferred to the project partners in XR2Learn via European Commission Grant Agreement Number 101092851.

4.2.5 Redress process

Within 3 working days of the delivery of a rejection letter considering the proposal as non-eligible or an ESR, a proposal coordinator may submit a request for redress if s/he believes the results of the eligibility checks have not been correctly applied, or if s/he feels that there has been a shortcoming in the way his/her proposal has been evaluated that may affect the final decision on whether to enter the XR2Learn Consortium or not. In that case, an internal review committee of the XR2Learn consortium will examine the request for redress. The committee's role is to ensure a coherent interpretation of such requests, and equal treatment of applicants.

Requests must be:

- Related to the evaluation process or eligibility checks.
- Clearly describe the complaint.

¹² To be checked at EC services such as http://ec.europa.eu/taxation_customs/vies/

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

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

Please note:

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

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

5 PILOT SPECIFICATION PHASE

5.1 Step 2.1: Pilot SPECIFICATION Phase execution

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

During this phase the sub-project will build/fine-tune their application concept, perform additional development/ customization to utilize the XR2Learn technology, prepare a detailed pilot specification deliverable and a tech-business presentation.

At least 5 working days before the end of the DESIGN phase the sub-project coordinator should provide a deliverable entitled: **D1 “Detailed XR Pilots Specification”** 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

5.2 Step 2.2: Review of the Pilot SPECIFICATION phase

At the end of the sub-project’s month M3, the Open Call #2 subprojects will be remotely evaluated using a teleconference platform (e.g. Zoom, WebEx or Teams) by external experts to determine a) if the Pilot Specification phase is completed successfully and b) if the subproject is ready to enter the Pilot EXECUTION phase.

The review committee will consist of:

- Two Independent Experts external to XR2Learn consortium
- One XR2Learn consortium member acting as moderator

During the meeting, the sub-project will provide a Power Point presentation or a similar tool format and make a presentation of the sub-project concept focusing on the technological dimension and the pilot implementation/experiment workplan and answer to questions of the evaluation team. Moreover, they should demonstrate that the proposed XR application is ready to enter the Pilot Execution Phase.

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

At the end of the review, each expert will score each sub-project with three marks between 1 and 10:

- a) one for their **technical excellence (Individual Technical Evaluation Score, ITES)**
- b) one for their **Pilot scale and potential (Individual Pilot Evaluation Score, IPES)** and
- c) one for the **Market Readiness and business potential (Individual Business Evaluation Score, IBES).**

The score given by each independent expert will be equal and independent from each other. The **Final Technical Evaluation Score (FTES)**, the **Final Pilot potential Evaluation**

Score (FPES) and the **Final Business potential Evaluation Score (FBES)** will be the average of the experts' ITES, IPES and IBES evaluation scores respectively.

In case a subproject has not delivered the D1 “Detailed XR Pilots Specification” deliverable or does not participate at the Pilot SPECIFICATION Phase Review all FTES, FPES and FBES will be zero (0).

5.3 Step 2.3: Selection to the Pilot EXECUTION Phase

At the end of the evaluation day the sub-projects will be ranked based on their technical evaluation scores. The **Final Evaluation Score (FES)** will be evaluated as follows:

$$\text{FES} = 0.3 \times \text{FTES} + 0.4 \times \text{FPES} + 0.3 \times \text{FBES}$$

The final ranking of the sub-projects will be based on the FES. In case there are two or more sub-projects that have equal FES, the one with higher FTES will be ranked higher. In case they have equal FTES, the external experts' committee will vote on the final ranking.

Though the sub-projects will be informed for their own FTES, FPES and FBES, the sub-projects final ranking will not be announced. Instead, the top eight (8) sub-projects will be announced to enter the Pilot EXECUTION phase. **The remaining 2 sub-projects will be automatically terminated.**

5.4 Step 2.4: Compensation of the SPECIFICATION phase

Given that FES is greater or equal to five (5.0) the DESIGN phase is considered completed successfully irrespective of the selection to enter the Pilot EXECUTION Phase or not.

The sub-projects that have successfully completed the Pilot EXECUTION phase will be requested to send to the XR2Learn coordinator **within 5 working days** a financial statement F1 (template will be provided) requesting the €30.000 voucher of the Pilot SPECIFICATION Phase.

The XR2Learn coordinator after receiving the above document will proceed with the payment of the phase voucher (provided in a lump sum mode).

In case a consortium has not successfully complete the Pilot SPECIFICATION phase or does not submit the above documentation within the foreseen timeframe, their sub-grantee contract will be automatically terminated, and no Pilot SPECIFICATION phase compensation will be provided.

After providing the Pilot SPECIFICATION phase funding to the sub-project consortium beneficiaries, the Pilot SPECIFICATION phase is completed.

6 PILOT EXECUTION PHASE

6.1 Step 3.1: Pilot EXECUTION sub-phase 1

After the Pilot SPECIFICATION phase successful completion, the sub-projects will enter the Pilot EXECUTION phase, which is the main project phase. The duration of this phase will be 7 months, covering project months M4 (July 2025) to M10 (January 2026).

During this phase, the subproject consortium should execute the pilot phase of their XR-application which should reach a readiness level of at TRL > 7 and MRL ≥ 4.

At the end of sub-project's month M6, a remote review will take place to evaluate the progress of the sub-project. Five (5) working days before the review, the sub-project coordinator should submit deliverable **D2: "Initial Pilot Execution Results"**, analysing in detail the sub-project pilot and the initial pilot results approach, including detailed analysis and screenshots of the application and the experiments. Short analysis of the impact potential and draft business considerations may also be included.

6.2 Step 3.2: Sub-phase 1 Review & Compensation

The Pilot EXECUTION sub-phase 1 review will be remote via a teleconference platform (e.g. Skype, Zoom or WebEx). The review committee will consist of:

- Two External Experts
- One XR2Learn consortium member acting as moderator

The evaluation will last for one (1) hour. The sub-project will make a short presentation of the sub-project (5-10 minutes), a detailed demonstration of the XR application (15-20 minutes), early results of the pilot (15-20 minutes), while keeping 15-20 minutes for questions and answers.

After the review, the sub-project coordinator will receive a review report, including comments and recommendations. The report will also state if the Pilot EXECUTION sub-phase 1 implementation is considered successful or not.

- On successful evaluation of the sub-phase and acceptance of the D2 deliverable, the sub-project coordinator will be requested within **five (5) working days** after receiving the evaluation report to submit the financial statement **F2** (template will be provided) requesting the intermediate €100.000 voucher of the mid Pilot EXECUTION sub-phase. Given the above, the coordinator will release the mid Pilot EXECUTION phase voucher of €100.000.
- On rejection of the D2 deliverable or in case of not satisfactory review, the sub-project coordinator will be requested to continue the Pilot EXECUTION phase without receiving the voucher of the sub-phase. The rejected D2 deliverable may be (re-)submitted at the end of the Pilot EXECUTION phase, hence qualifying for its payment, together with the amount due in the Pilot EXECUTION sub-phase 2 review, if and when D2 deliverable is approved.

6.3 Step 3.3: Pilot EXECUTION sub-phase 2

After the Pilot EXECUTION sub-phase 1 review, the sub-projects will enter the last part of the Pilot EXECUTION phase. During this sub-phase, the sub-project consortium must perform large scale pilots and validate their XR applications. The duration of this sub-phase will be approximately 4 months, covering project months M7 to M10.

One week before the end of the Pilot EXECUTION sub-phase 2, the sub-project coordinator should submit the following deliverables:

D3: PILOT EXECUTION Validation, a report describing the XR application testing and large scale pilot validation approach, along with the results of the validation. Additionally, it should provide information regarding the gender balance of the subjects participating in the training/piloting for the evaluation of the tools. This deliverable will also include a section (3-5 pages) describing the exploitation plan and the business potential

D4: Project Video, a video with a duration of 5-10 minute describing the consortium, the XR application and the pilot results. This video will be published at the XR2Learn web site.

6.4 Step 3.4: Sub-phase 2 Review & Compensation

At the end of sub-project month M10, a Pilot EXECUTION sub-phase 2 review will take place. The XR2Learn consortium reserves the right to select at that point if the Pilot EXECUTION sub-phase 2 review will take place remotely or with physical presence. **In case of a physical review, it will mandatory that at least one consortium representative/member appear at the event, sign the participants list and actively participate at the review process.** Moreover, if for any reason sub-project's D2 deliverable has not been previously accepted, participants may re-submit it at this evaluation phase.

During the Pilot EXECUTION sub-phase 2 review, each consortium will have a meeting with a review committee that will consist of:

- Two External Experts
- One XR2Learn consortium member acting as moderator

The evaluation will last for one (1) hour. The sub-project will make a short presentation of the sub-project (3-5 minutes), a presentation of the application and large scale pilot results (20-25 minutes), a presentation of the business and exploitation strategy (10-15 minutes), while keeping 10-15 minutes for questions and answers. **Successful evaluation of the deliverables, presentation and demonstration of the solution to the committee will result in successful completion of the Pilot EXECUTION Phase.**

Just after the Pilot EXECUTION sub-phase 2 review event, and within **5 working days**, all sub-project coordinators that have successfully complete the Pilot EXECUTION phase should send to the XR2Learn coordinator the financial statement F3 (template will be provided) requesting the €100.000 voucher of the Pilot EXECUTION sub-phase 2. In case the D2 deliverable was not accepted in sub-phase 1 review but was accepted at Pilot EXECUTION sub-phase 2 review, the sub-grantee should also submit the financial statement F2 requesting in total a €200.000 voucher.

The XR2Learn coordinator after receiving the above mentioned financial statements will proceed with the payment (provided in a lump sum mode), given that the relevant funding has been released by the EC for XR2Learn.

In case a sub-project, either has not participated in the review, or has not successfully completed both the Pilot EXECUTION sub-phases or has not submitted the deliverables D2, D3 and D4 or the financial statements F2 and F3 with the foreseen timeframe, their sub-grantee contract will be automatically terminated, and no compensation will be provided.

6.5 Step 3.5: Selection to the GROWTH Phase

During the Pilot EXECUTION sub-phase 2 review, the external experts will score each sub-project with a mark between 1 and 10 based on their pilot results, business and exploitation strategy and the quality of deliverable D4: “Project Video”. The value of the score of each committee member will be equal and the **Final Pilot EXECUTION Evaluation Score (FEES)** will be the average of the individual scores.

At the end of the Pilot EXECUTION sub-phase 2 review, the sub-projects will be ranked based on the FEES. In case two or more sub-projects have equal FEES, the external experts’ committee will decide on the final ranking based on each sub-project impact potential and probability to achieve the results.

At the end of the event the project coordinator will announce the top three (3) sub-projects that will enter the GROWTH phase. **The remaining 5 sub-projects will be automatically terminated.**

7 GROWTH PHASE PROJECT EXECUTION

After the Pilot EXECUTION phase completion, the sub-projects will enter the GROWTH phase. The duration of this phase will be 2 months, covering project months M11 (February 2026) to M12 (March 2026).

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.

In case, the deliverable D5 have not been submitted on time, the sub-project will not be allowed to participate at the GROWTH review process.

7.1 Step 4.1: Review of the GROWTH phase

At the end of the sub-project’s month M12, the Open Call #2 subprojects will be 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, the GROWTH phase review will be cancelled, the GROWTH phase will be considered that was completed unsuccessfully, and the sub-project will be automatically terminated.

The review committee will consist of:

- Two Independent Experts external to XR2Learn consortium
- One XR2Learn consortium member acting as moderator
- Any XR2Learn consortium member, EU official or public in general may participate as audience

Though not binding at this point, the GROWTH review is expected to last for 30-60 minutes per sub-project based on the selection of a virtual or physical review and the composition of the audience. The sub-project consortium will make a short presentation of the sub-project (10-15 minutes), keeping 10-15 minutes for questions

and answers. In case of a physical review or participation of external audience, a detailed demonstration of the XR tools /application, either during the review session or in a separate session may be requested. The evaluation team may extend the technical evaluation if they consider that it is necessary.

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

At the end of the process, all XR2Learn consortium members will vote for the **top #1 project**. Each XR2Learn consortium member will have up to two (2) votes and all votes will be equal. At the end, the projects will be ranked based on the votes that they will receive. The sub-project that will receive the maximum number of votes will be the Top #1 project and will receive the additional €5.000 voucher. If 2 or even all 3 sub-projects receive the same number of votes, they will equally share the prize.

7.2 Step 4.2: 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 (€65,000).

In case, deliverable D5 has not been accepted, the GROWTH phase will not be compensated. 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.

8 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 include¹³:

8.1 Participation to the XR2Learn project

A non-exhaustive list of benefits and responsibilities include:

- The application 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.

8.2 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 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.

8.3 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.

¹³ 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.

8.4 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:

- (a) display the EU emblem;
- (b) display the XR2Learn logo and
- (c) include the following text:

For communication activities: *“Project [name of the project] has been indirectly funded, via the cascading funding mechanism, from the European Union’s Horizon Europe Research & Innovation programme under project XR2Learn (grant agreement No 101092851)”*.

For application, software component/tools, and major results: *“This [application][software][insert type of result] has been indirectly funded, via the cascading funding mechanism, from the European Union’s Horizon Europe Research & Innovation programme under project XR2Learn (grant agreement No 101092851)”*.

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

Any publicity made by the sub-project consortium beneficiary in respect of the project, in whatever form and on or by whatever medium, must specify that it reflects only the author’s views and that the EC or XR2Learn project is not liable for any use that may be made of the information contained therein.

The EC and the XR2Learn consortium shall be authorised to publish, in whatever form and on or by whatever medium, the following information:

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

- any picture or any audio-visual or web material provided to the EC and XR2Learn in the framework of the project.

The sub-project beneficiaries shall ensure that all necessary authorisations for such publication have been obtained and that the publication of the information by the EC and XR2Learn does not infringe any rights of third parties.

Upon a duly substantiated request by the beneficiary, the XR2Learn coordinator, if such permission is provided by the EC, may agree to forego such publicity if disclosure of the information indicated above would risk compromising the beneficiary's security, academic or commercial interests.

8.5 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.

9 CHECKLIST

- 1) **Does your planned work fit with the call for proposals?** Check that your proposed work does indeed address the topics of in this open call.
- 2) **Does your proposal address XR2Learn technology?** Check that your proposed work does indeed address the XR2Learn technologies (XR and educational scenarios are the target sectors).
- 3) **Is your proposal eligible?** The eligibility criteria are given in chapter 3 “Proposal Eligibility Criteria”. In particular, make sure that you satisfy the minimum participation requirements (consortium composition, SME coordinator, all legal entities are established in eligible countries).
- 4) **Is your proposal complete?** Have you completed all mandatory questions and uploaded all necessary documents/Annexes?
- 5) **Does your proposal fulfil questions requests/comments?** Proposals should be precise, concise and must answer to requested questions, which are designed to correspond to the applied evaluation. Omitting requested information will almost certainly lead to lower scores and possible rejection.
- 6) **Have you maximised your chances?** There will be strong competition. Therefore, edit your proposal tightly, strengthen or eliminate weak points.
- 7) **Have you submitted your proposal before the deadline?** It is strongly recommended not to wait until the last minute to submit the proposal. Failure of the proposal to arrive in time for any reason, including network communications delays, is not acceptable as an extenuating circumstance. The time of receipt of the message as recorded by the submission system will be definitive.
- 8) **Have you provided ALL necessary annexes completed and signed for ALL consortium beneficiaries as needed?** Remember that Annex 4 “Consortium Declaration” should be signed by all application consortium beneficiaries, Annex 5 “Declaration of Honour” should be completed and signed by all application consortium beneficiaries and Annex 6 “SME Financial Stability” should be completed and signed by all application consortium SMEs.
- 9) **Do you need further advice and support?** You are advised to communicate with the XR2Learn team via the XR2Learn F6S blog.

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

10 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-2/>

Apply via: <https://www.f6s.com/XR2Learn-open-call-2/apply>

F6S support team: support@f6s.com

Online Q&A: <https://www.f6s.com/xr2learn-open-call-2/discuss>

Other support¹⁴: opencalls@xr2learn.eu

¹⁴ For non-binding information

11 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 .
- [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 .
- [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 .
- [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.

1.3 Annex 3.1: Open Call Proposal Supplement



ANNEX 3.1 OPEN CALL PROPOSAL SUPPLEMENT

SEPTEMBER 2024

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/2024/09/XR2Learn-Annex-2-Guide-for-Applicants-FINAL.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]

Application in Numbers¹⁵

Reply

¹⁵ Completing all replies of table “Application in Numbers” is mandatory and part of the eligibility criteria. All answers should be properly justified in sections 1-3

Number of VR models for educational applications to be provided through the XR2LEARN platform	
Number of complete educational applications/tools provided through the XR2LEARN platform	
Number of utilized XR2Learn Enablers	
Number of new Enablers or Beacon Applications provided	
Trainees reached through the sub-project piloting	

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:

- The technical challenges and barriers expected to be solved, aligned with the XR2LEARN project concept.
- Expected project outcomes, which should be justified, measurable and realistic within the timeline of the project implementation.
- The innovation potential, and how the project is novel. The circular nature of the project.

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:

- The specific activities that will be implemented, the time required, and expected outputs.
- Relevant milestones and KPIs to measure achievement of results.
- External barriers/ risks that may affect the workplan and compromise the project.
- 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. Include also:

- *Describe the relevance and socio-economic impact and benefits of your project/component and planned tools/ applications.*
- *Describe the industrial relevance and market potential of the project and planned experiment.*
- *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:

- *Planned activities (during and post-project) to ensure the commercialisation of the solution and business strategy to ensure the sustainability of expected project outcomes.*
- *Describe the industrial relevance and market potential of the project and planned experiment.*
- *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:

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

2.4 Sustainability strategy

Describe the sustainability strategy. Include also:

- *Planned activities to Open Source and XR Communities to ensure sustainability*
- *Planned contributions to clusters, partnerships, alliances and associations*
- *Planned activities to relevant standardization activities to ensure sustainability*
- *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:

- 1 A short summary of the relevant experience of the applicant.*
- 2 Justification of the partners' complementarities.*
- 3 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.).*
- 4 Participation in relevant open source or XR communities, along with active role in relevant clusters, partnerships, alliances, associations and standardization.*

3.2 Applicant Relevant Experience

Justify the previous relevant experience. Please:

- Include references and role in previous projects relevant to the proposal*
- Include products or product-lines relevant to the proposal*
- 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.

- Justification of how the team has the required knowledge and capacity to guarantee a successful project implementation.*
- Justification of the applicant 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 ¹⁶
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 Institut (Yes/No)	Requested Funding (in EUROS)	Requested Funding %
Total					100%

Total					100%
--------------	--	--	--	--	-------------

¹⁶ 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
Informed consent	
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?	
Research on human embryo/foetus	
Does the proposal involve Human Embryos?	
Does the proposal involve Human Foetal Tissue / Cells?	
Does the proposal involve Human Embryonic Stem Cells?	
Privacy	
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?	
Research on animals	
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?	
Research involving developing countries	
Use of local resources (genetic, animal, plant etc)	
Benefit to local community (capacity building i.e., access to healthcare, education etc)	
Dual use	
Research having direct military application	
Research having the potential for terrorist abuse	
ICT implants	
Does the proposal involve clinical trials of ICT implants?	
I CONFIRM THAT NONE OF THE ABOVE ISSUES APPLY TO MY PROPOSAL	YES/NO

1.4 Annex 4: Consortium Declaration



ANNEX 4
OPEN CALL CONSORTIUM DECLARATION

SEPTEMBER 2024

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 #2.**
- **There is no linked or associated entity participating to more than one proposal submitted in the XR2LEARN Open Call #2.** 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	

1.5 Annex 5: Declaration of Honour



ANNEX 5 DECLARATION OF HONOUR

SEPTEMBER 2024

Declaration of Honour¹⁷

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

¹⁷ 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:

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

1.6 Annex 6: SME Financial Stability



ANNEX 6 SME FINANCIAL STABILITY

SEPTEMBER 2024

DECLARATION ON STATUS & FINANCIAL STABILITY¹⁸

Specific identification of the applicant enterprise:

Name or Business Name	_____
Address (or Registered office)	_____
Registration/ VAT number	_____
Names and titles of principal directors	_____
Date of Foundation	_____
PIC number¹⁹	_____

Type of enterprise (see explanatory note)

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

<input type="checkbox"/>	Autonomous enterprise	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"/>	Partner enterprise	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"/>	Linked enterprise	below.

Data used to determine the category of enterprise

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

Reference period (*) _____		
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.

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

Important: 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"/> No <input type="checkbox"/> Yes (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)

¹⁸ Replicate pages 2 to 10 to cover ALL SMEs which are members of the consortium.

¹⁹ 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>

Signature: _____

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 SME²⁰ 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 influence²¹.

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%²² or more in any other enterprise,
- And is not 25%¹⁹ or more owned by any enterprise or public body or jointly by several linked enterprises or public bodies, apart from some exceptions²³,
- 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 enterprise²⁴.

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.

²⁰ Henceforth in the text, the term "Definition" refers to the Annex to Commission Recommendation 2003/361/EC on the definition of SMEs.

²¹ Definition, Article 3

²² 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)

²³ 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)

²⁴ - 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 it²¹.

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 accounts²⁵, 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 UNITS²⁶

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.

²⁵ 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).

²⁶ 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 enterprise²⁷ (see explanatory note)

Reference period²⁸:

	Headcount (AWU)	Annual turnover (*)	Balance sheet total (*)
1. Data ²⁵ of the applicant enterprise or consolidated accounts (copy data from box B(1) in annex B ²⁹)			
2. Proportionally aggregated data ²⁵ of all partner enterprises (if any) (copy data from box A in annex A)			
3. Added up data ²⁵ of all linked enterprises (if any) – if not included by consolidation in line 1 (copy data from box B(2) in annex B)			
Total			

(*) 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.

²⁷ Definition, Article 6 paragraphs 2 and 3

²⁸ 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).

²⁹ 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.			
Total			

(*) 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

Name or Business Name	
Address (or Registered office)	
Registration/ VAT number³⁰	
Names and titles of principal directors³¹	

2. Raw data regarding that partner enterprise

Reference period	Headcount (AWU)	Annual turnover (*)	Balance sheet total (*)
Raw data			

(*) 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 enterprise³². If necessary, add “linkage sheets” for the enterprises which are not yet included through consolidation.

3. Proportional calculation

- a) Precisely indicate the holding³³ 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 (*)
Proportional results			

(*) EUR 1 000.

³⁰ To be determined by the Member State according to its needs

³¹ Chairman (CEO), Director-General or equivalent.

³² Definition, Article 6 paragraph 3, first sub-paragraph

³³ 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 consolidation³⁴.

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)

	Headcount (*)	Annual turnover (**)	Balance sheet total (**)
Total	_____	_____	_____

(*) 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.

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

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

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

³⁴ 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)

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

(*) 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

Name or Business Name	_____
Address (or Registered office)	_____
Registration/ VAT number³⁵	_____
Names and titles of principal directors³⁶	_____

2. Data on enterprise

Reference period	Headcount (AWU)	Annual turnover (*)	Balance sheet total (*)
Total	_____	_____	_____

(*) EUR 1 000.

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

³⁵ To be determined by the Member State according to its needs

³⁶ 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 consolidation³⁷.

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.

³⁷ 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).

1.7 Annex 7: Open Call Bank Account Form



ANNEX 7 COORDINATOR BANK ACCOUNT FORM

SEPTEMBER 2024

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

BANK STAMP + SIGNATURE OF BANK
REPRESENTATIVE

DATE + SIGNATURE OF ACCOUNT HOLDER
(**OBLIGATORY**)

The bank stamp + signature of bank representative can be substituted by the attachment of a recent bank statement (less than 2 months).

1.8 Annex 8: Frequently Asked Questions



ANNEX 8 FREQUENTLY ASKED QUESTIONS

SEPTEMBER 2024

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.

1 GENERAL AND ELIBILITY QUESTIONS

1.1 When is the open call submission deadline?

The XR2LEARN Open Call is announced on 1st September 2024 and it is open for applications from the 27th of September 2024 till Friday 27th of December 2024 at 17:00 CET (Brussels time).

1.2 Can a University or a Research Centre lead a proposal?

No. A proposal may be submitted 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.

1.3 Can an industrial partner not SME lead a proposal?

No. A proposal may be submitted 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.

1.4 Can a proposal be submitted by a consortium?

Yes. A proposal may be submitted 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.

1.5 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.

1.6 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.³⁸

1.7 Is the funding provided as lump sum?

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

1.8 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

³⁸ 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

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

1.9 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 obtained³⁹ 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).

1.10 I had issues with my internet connection and was not able to submit my proposal by the deadline. Can I submit after the 27th of December 2024 deadline?

No. The deadline for proposal submission is December 27th, 2024, at 17:00 CET (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 December 27th, 2024.

³⁹ <https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/how-to-participate/participant-register>

2 SUBMISSION AND EVALUATION

2.1 How do I submit a proposal?

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

2.2 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.

2.3 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”.

2.4 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.

2.5 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.

2.6 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.

2.7 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.

2.8 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.

3 PROJECT EXECUTION

3.1 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 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 31st of March 2025, so that the new sub-project may start on 1st of April 2025.

3.2 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.