

D5.1: Report on link to national programmes and initiatives (V1)

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Abstract	This report outlines coordination efforts, engagement strategies, and progress in fostering collaboration with national initiatives focused on Virtual Worlds technologies across the EU. Covering the first 18 months of the project, the report introduces structured collaboration frameworks to enhance knowledge-sharing, strategic alignment, and coordination, while also setting the stage for future activities and ensuring the long-term sustainability of the Virtual Worlds ecosystem within national and EU-level innovation landscapes.
Keywords	Ecosystem



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* R: Document, report (excluding the periodic and final reports)

DEM: Demonstrator, pilot, prototype, plan designs

DEC: Websites, patents filing, press & media actions, videos, etc.

DATA: Data sets, microdata, etc.

DMP: Data management plan

ETHICS: Deliverables related to ethics issues.

SECURITY: Deliverables related to security issues

OTHER: Software, technical diagram, algorithms, models, etc.

EXECUTIVE SUMMARY

This report highlights the coordination efforts, engagement strategies, and progress in fostering collaboration with national initiatives focused on Virtual Worlds technologies across the EU. The overarching strategy is to support the continued integration of Virtual Worlds technologies into the European national innovation landscape, and to provide a vehicle for those organisations to be aligned – and to reach – the EU level.

The aim is to structure collaboration frameworks and tools used to promote knowledge-sharing, strategic alignment, and coordination with the identified ecosystem of national initiatives. The document should clear the path ahead with the next activities and related strategy, while ensuring the long-term sustainability of the Virtual Worlds ecosystem developed by this Task.

Covering the first half of the project - 18 months - it is the foundation for future reports (D5.2 and D5.7) documenting the identification, engagement, and initial collaboration with national initiatives. It provides a mapping of Virtual Worlds initiatives for creating a network that depicts the diversity of the current European landscape and leaving for the second half of the project activities on consolidating the network, identifying new members beyond the ones shown in this report, and bringing to them the assets produced in the context of this and other tasks and activities of the project.

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LIST OF ABBREVIATIONS

XR = Extended reality
PPP = Public Private Partnership
VW = Virtual Worlds
EC = European Commission

1 INTRODUCTION

Virtual Worlds are playing a growing role in the digital landscape, providing immersive environments that are proven to disrupt various sectors. Foremost among these, but not limited to, are industry, education, entertainment, and cultural heritage. While Virtual Worlds have the potential to positively impact the European digital ecosystem and wider economy, it is important to ensure that such benefits do not come to the detriment of European values and society. However, the potential of the European Virtual Worlds ecosystem is currently hindered by fragmentation and by the absence of an adequate mapping of the sector. Therefore, from a strategic perspective, there is a clear need to first identify and then consolidate the current actors operating in the European Virtual Worlds landscape.

Task 5.2 of the OPENVERSE project aims to provide an initial, pragmatic response to the needs identified above. Namely, the task identifies the efforts being currently made by multiple initiatives at Member State level. Additionally, the task provides an outline of coordination efforts, engagement strategies and progress made in building a network of collaboration with national initiatives focussing on Virtual Worlds-related technologies.

The overarching strategy is to support growth and communication among national initiative on Virtual Worlds, fostering collaboration between them and providing a vehicle to exchange practices, in order to avoid silos by knowing best how different parts of the European ecosystem are developing and upholding innovation.

The work started by performing an identification, mapping and with a view to ignite the engagement with national initiatives through a structured inventory to ensure that relevant stakeholders had the opportunity to be involved. This mapping effort also exhibits the diversity and complexity of the European Virtual Worlds ecosystem, showing different approaches to the uptake of the technology as well as the trends, needs and challenges.

Furthermore, a methodology was put in place to structure the collaboration with a view to foster knowledge-sharing, the development of joint activities, with the aim of promoting an alignment with national digital transformation strategies among participants. This facilitates coordination among stakeholders, ensuring that engagement efforts translate into meaningful and actionable outcomes. Additionally, this deliverable highlights some of the assets of the project, such as the OPENVERSE Technology Framework (OTF) and the Observatory that were introduced to the network of stakeholders.

Finally, this deliverable seeks to promote the long-term sustainability and growth of the Virtual Worlds ecosystem beyond the lifespan of the OPENVERSE project. By constructing and strengthening the network of national initiatives working on Virtual Worlds we are developing an instrument that ensures the growth of Virtual Worlds technologies as strategic element of digital innovation landscapes in the EU and can always be supported by the PPP or autonomously by the participants.

1.1 DEFINITION OF OBJECTIVES AND GOALS OF THE TASK

The main objectives of Task 5.2, as anticipated in the introduction, are: building synergies, aligning roadmaps and action plans, influencing standards and reinforcing the links among the different technological areas behind the multiple elements that make up Virtual Worlds. Thus, to converge into a general statement, the Task is to support continuous integration of Virtual Worlds technologies into national innovation landscapes, providing a vehicle for organisations to be aligned at EU level.

At OPENVERSE level, Task 5.2 supports two global objectives of the project:

- *OO7: Promote interdisciplinary cooperation of specialists from various sectors, including robotics, computer science, education, psychology, sociology, and design, in order to comprehensively address the opportunities and difficulties posed by the Virtual worlds. This will foster the exchange of information, resources, and best practices while preserving an open environment*
- *OO8: Collaborate with other initiatives to consider Virtual worlds as part of their roadmaps, align with each other, generate and discuss requirements, and facilitate alignment and implementation actions*

The synergies and collaboration, focus of this Task, are meant to deploy a methodology that ensures a long-term engagement of the participants. By providing a clear purpose and shared goals on the uptake of Virtual Worlds - open, accessible, ethical, and respectful of EU values - the stakeholders will be engaged over time. Participants are also to be encouraged to actively contribute, share insights, and to participate in co-creation activities (WP1), thus fostering a sense of ownership and long-term commitment to the community. This is also supported by recurring events and workshops planned to maintain momentum.

Finally, each of the activities with the stakeholders is value-driven, meaning that stakeholders should always get tangible benefits, such as exclusive insights, learning or networking opportunities, or more direct access to policy makers at the EU level.

1.2 DEFINITION OF OBJECTIVES AND GOALS OF THE DELIVERABLE

In a nutshell, the concrete objectives addressed in this deliverable are:

- **To develop a comprehensive mapping:** establish and maintain a living database of national initiatives in the EU promoting the uptake of Virtual Worlds, categorising them based on technological domains, use cases, and strategic significance.
- **To enhance visibility and collaboration:** enable national initiatives to network and collaborate, and to enhance the opportunities for national initiatives to engage at European level.
- **To advance the OPENVERSE Technology Framework:** enable national initiatives to engage with the definition of certain parts of the OTF, ensuring it incorporates a broad spectrum of stakeholders' views.
- **To establish the foundation for sustainability and future growth:** continuously support the network to strengthen the cooperation with the aim of identifying key contributors and viable operational models before end of project.

2 SCOPING THE ACTIVITY

The activity builds upon a multi-stakeholder approach to identify and engage national programmes and initiatives, considered key in the uptake of Virtual World technologies across the different EU members states. The strategy of Task 5.2 aligns with the general objective of WP5 to develop a collaboration network with national programs, initiatives, organisations and bodies.

Therefore, the plan foresaw the following points, encompassing a methodology definition and consequent execution.

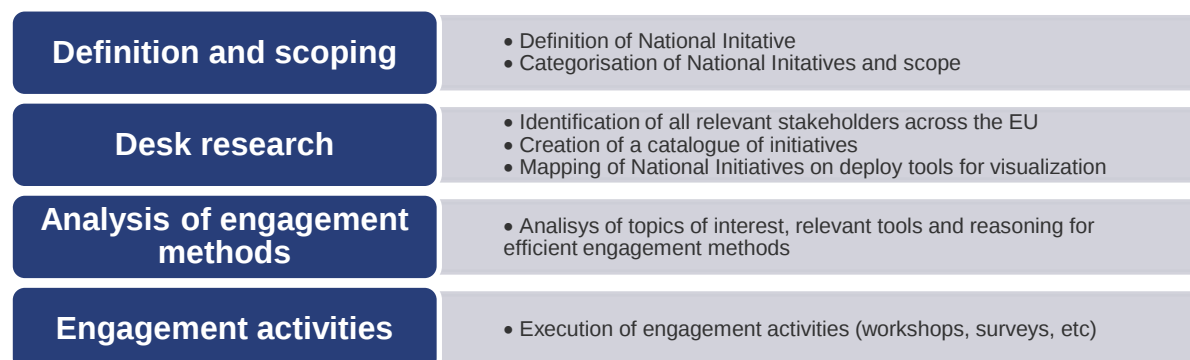


Figure 1 – methodology of T5.2

The next section and subsections will detail each of the above-mentioned stages.

2.1 DEFINITION OF NATIONAL INITIATIVES

To initiate the work on identifying and mapping national initiatives, avoiding having misleading definitions of what a National Initiative is, the project convey with a new definition as follows:

“A National Initiative refers to structured efforts, whether public, private, or community-driven, that promote the adoption and advancement of digital technologies that are key for the development of Virtual Worlds. These initiatives can be led by government agencies, industry stakeholders, research institutions, no-profit organisations etc, each playing a unique role in shaping the Virtual Worlds ecosystem.”

We acknowledge the fact that it might be different definitions for National Initiatives in the literature but in the continuation of the work in OPENVERSE we will be using this for scoping and execution of the work.

2.2 STRATEGY FOR THE CATEGORISATION OF THE STAKEHOLDERS

A strategy for the categorisation of the stakeholders was defined early in the process, with a view to ensure unbiased results during the identification and selection phases.

Two overarching categories of initiatives have been defined: top-down and bottom-up. The top-down category includes initiatives created by government-led actions including, for instance, government-led policy development, funding programmes, and regulatory frameworks to foster innovation. Conversely, the bottom-up category includes initiatives kick-started by private actors, and is made up of two sub-categories: on the one hand initiatives created by industrial or individual actors with an

interest in the topic or financial opportunity, for example industry-driven initiatives emphasizing technological advancements, commercialisation, and market expansion, and on the other hand grassroots initiatives stemming from open-source collaborations, community engagement, and experimental approaches to Virtual Worlds technology.

However, this distinction was not strictly considered as a binding criterion since the selection process examines first and foremost the effort of each of the initiatives to accelerate digital transformation and to create inclusive and sustainable Virtual Worlds ecosystems at the national level across the EU. Therefore, the description provided above is to be intended as means to provide the reader with a more thorough understanding of the reasoning underlying the initiatives identification process, rather than a prescriptive methodological approach.

There are a couple of filters that have been applied to the research process to prune the entire scope of national associations and to focus on those relevant for OPENVERSE. First, any of the selected national initiatives should belong to an EU country; second, they should belong to one of the building blocks (those are technological areas related to Virtual Worlds) as reported in *Chapter 3 – Stakeholder identification and analysis of D5.3 - Report on collaboration with other existing EU initiatives V1*, and the EC Communication *An EU initiative on Web 4.0 and virtual worlds: a head start in the next technological transition*¹ published by the European Commission in July 2023².

With a view to streamline the mapping process, a preliminary step has consisted in the identification of relevant initiatives through the OPENVERSE partners' networks. Despite being meant as a pragmatic entry-point, this only allowed to produce a preliminary list of initiatives, in most cases limited to the countries of establishment of the individual consortium partners. Additionally, language barriers have been identified as a challenge early in the process as the language used by the National Associations was not spoken by any of the consortium partners and thus these could have been hindered by the illiteracy of the local language.

The early identification of the above-mentioned challenges and limitations allowed to devise a mitigation strategy, mainly relying on the identification of proxies. These are entities that have a deep knowledge of the actions of the ecosystem developed in a specific country. The main categories of proxies identified are:

- **National trade associations:** also referred to as industry trade groups, business associations, sector associations, or industry bodies, these are organisations established and supported by businesses within a particular industry to represent their collective interests and promote sector-wide growth and development. Most national trade associations have working groups

¹ European Commission: *Commission Staff Working Document accompanying the document Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions an EU initiative on web 4.0 and virtual worlds: a head start in the next technological transition* (2023) <https://digital-strategy.ec.europa.eu/en/library/staff-working-document-information-insights-and-market-trends-web-40-and-virtual-worlds>

² For the sake of simplicity, the explanations on what each of the above technological areas contributes to the enabling of virtual worlds is not reported in this deliverable. To know more, please refer to the *Commission Staff Working Document* above mentioned. The areas are: Connectivity/Infrastructure, Computing, Data, Digital Twins, Distributed ledger – Blockchain, Extended Reality, AI, Electronics/photonics, IoT, Digital Identity, Standards, Integration for Virtual worlds, Edge AI (AIoT).

on digital technologies and, in some cases, specifically on Virtual Worlds. They therefore represent a good entry point to know more about the key industrial players in a country.

- **National contact points:** NCPs are government-funded structures established in the 27 EU Member States and Horizon Europe-associated countries. The organisation of NCPs varies across countries, ranging from highly centralised systems to decentralised networks. These organisations involve a diverse range of actors, including government ministries, universities, research institutions, specialised agencies, and private consulting firms. They are therefore important for understanding the R&I ecosystem and key players in each country.

Both categories of proxies were therefore relevant to get specific insights on the different ecosystems and stakeholders active in each country. The inputs received from the proxies can be summarised as follows:

- Understand the existence of a national strategy to promote the uptake of Virtual Worlds
- Understand if the strategy was government-led, industrial or grassroots
- Get in contact with stakeholders who may know more about that and that could point us to the right organisation or initiative (2nd degree proxies).
- Get in contact with projects and/or programmes that are somehow related to national initiatives on Virtual Worlds
- Get in contact with national initiatives on Virtual Worlds

To efficiently map the national initiatives, a classification schema was developed to guide the desk research. The final categorisation within the context of the OPENVERSE project was subsequently defined by T5.2 as follows:

- National trade associations (explained above)
- National contact points (explained above)
- European Digital Infrastructure Consortia (EDIC): instruments made available to Member States under the Digital Decade Strategy³ to speed up and simplify the setup and implementation of multi-country projects. Each EDIC is a legal person established by a Commission decision upon the application of at least three Member States and Commission approval.
- Non-profit organisations: entities dedicated to serving a social, educational, charitable, or community-driven mission rather than generating profits for owners or shareholders.
- Communities: group of people who share common professional interests, values, or goals in the uptake of Virtual Worlds, and interact with one another, forming social connections and a sense of belonging.

³ Digital Decade Strategy website: https://commission.europa.eu/strategy-and-policy/priorities-2019-2024/europe-fit-digital-age/europes-digital-decade-digital-targets-2030_en

- Research centres or groups: establishments founded, either privately or publicly for doing research.
- Public administrations / National agencies: actors managing public programs and policies, ensuring their effective execution for the benefit of society.
- Non-Governmental organisations: non-profit entities independent of governmental influence, although they may receive funding for operating.
- Incubators: organisations that help startup companies and entrepreneurs to develop businesses by providing a range of services.
- Innovation hubs: physical or virtual spaces that serves as a collaborative platform for individuals, organisations, and communities to come together to ideate, innovate, and create solutions for the world's most pressing challenges.
- National programmes: set of activities taken to implement specific objectives set forth by the central government.
- Regional programmes: set of activities taken to implement specific objectives set forth by the regional government.
- Skills development initiatives: set of activities dedicated to the development of people's skills according to some specific objectives.

Unlike T5.3, the categorisation based on building blocks involves a trade-off. Delving deeply into each building block—fully understanding the scope of each area in isolation without overlapping with any topics related to Virtual Worlds— would make the scoping exercise unfeasible. To address this, the national initiatives considered were those promoting Virtual Worlds and XR. In contrast to T5.3, this Task is more technology-focused, aiming to create an ecosystem that includes representatives from various technologies and communities already engaged in Virtual Worlds-related activities. The primary criterion for selection was the EU country of reference, followed by the type of stakeholder leading the national initiative. In a few cases, stakeholders were specifically focused on XR, and even fewer on digital twins, though Virtual Worlds remained a central application for the technologies they were promoting.

After the definition of national initiatives and programmes, and the categorisation to frame the search, the partners started the desk research by considering renown stakeholders in each country and, when possible, already adding national initiatives and programmes.

3 DESK RESEARCH

The engagement efforts of the proxies kept going in parallel to the desk research, so to continuously refine the search and to deepen the knowledge acquired on each Member State. Thus, after a first phase fully dedicated to the identification of the proxies, the two processes ran in parallel.

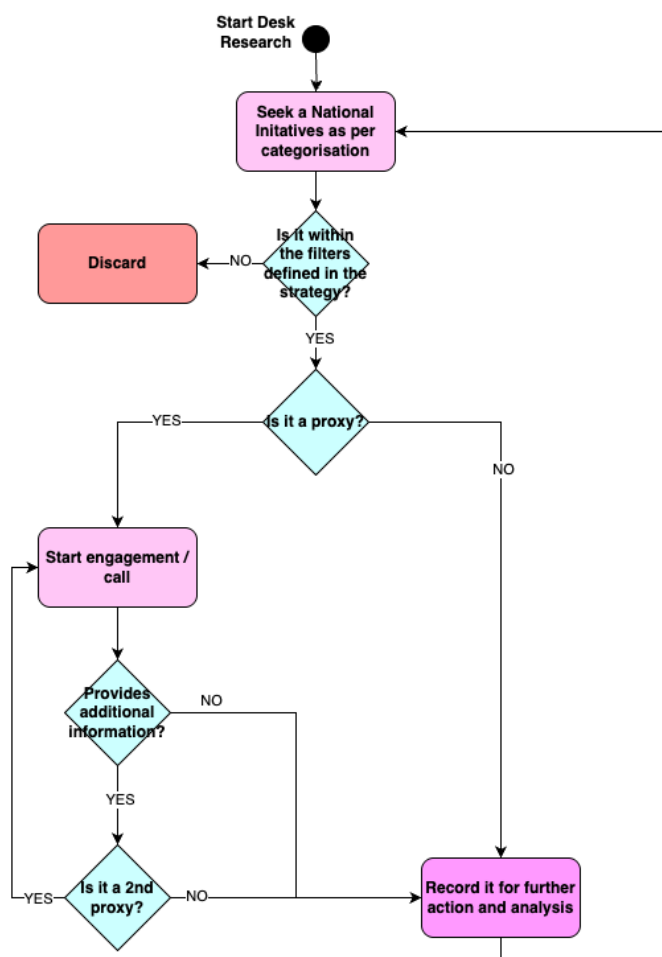


Figure 2 – Strategy for desk research

The flowchart depicted in Figure 1 describes the process followed for desk research. It starts with an initial identification of what could be considered as a national initiative. If the initiative identified fell within the scope outlined by the strategy in the previous chapter, it was then classified as either a proxy or non-proxy. Subsequently, two parallel processes were initiated. On one hand, initiatives classified as proxies were contacted to gather more information about the presence of national initiatives in their respective countries, with the possibility of leveraging their proxy status to establish contact with such initiatives. On the other hand, initiatives identified as ‘national initiatives’ were recorded in our internal repository for further analysis, after which they were contacted for additional information and to engage them in future efforts.

Based on the strategy and methodology outlined, all identified initiatives have been categorised and mapped to create a comprehensive overview of the national landscapes across the EU. The results of the desk research are available in Annex I.

3.1 MAPPING OF THE STAKEHOLDERS

Once the strategy, the objectives and a categorisation framework were put in place, the partners of T5.2 started mapping relevant stakeholders. First, each of the partners involved in T5.2 were tasked with adding stakeholders from their own networks. As Annex 1 shows, an excel table used by WP5 to map all the stakeholders engaged through T5.2 was created. The aim was to organise the inputs and evaluate the relevance of each stakeholder to the objectives of the Task. After a first round of research, a large number of proxies were added to the mapping (i.e. 30% National Contact Points and 25,8% National Trade Associations).

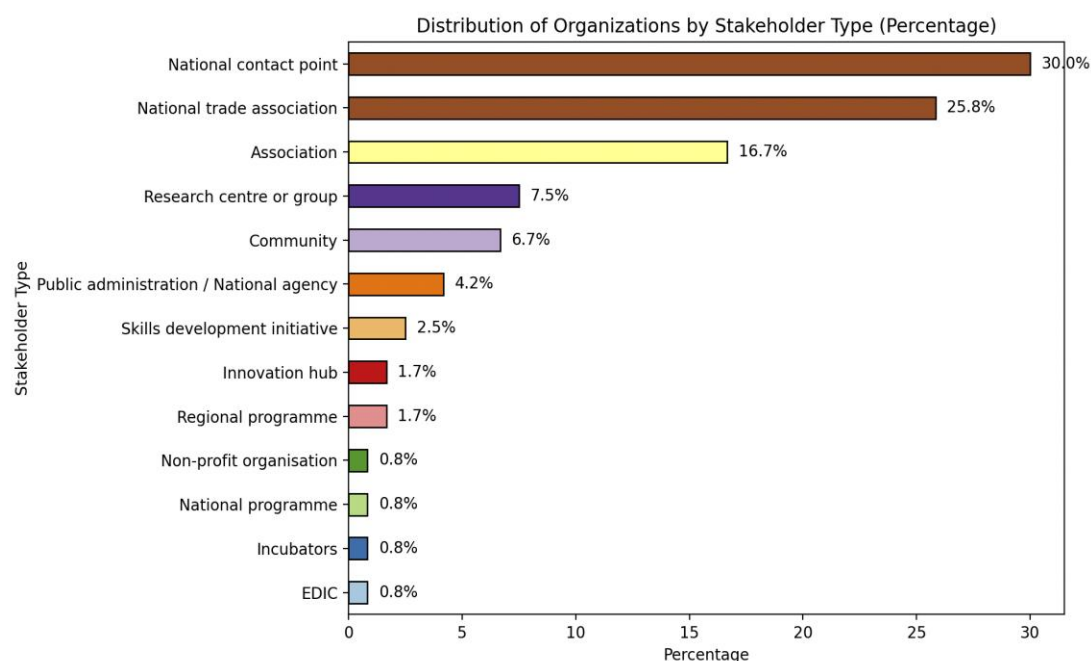


Figure 3 – Distribution of organisations by stakeholder type (including proxies)

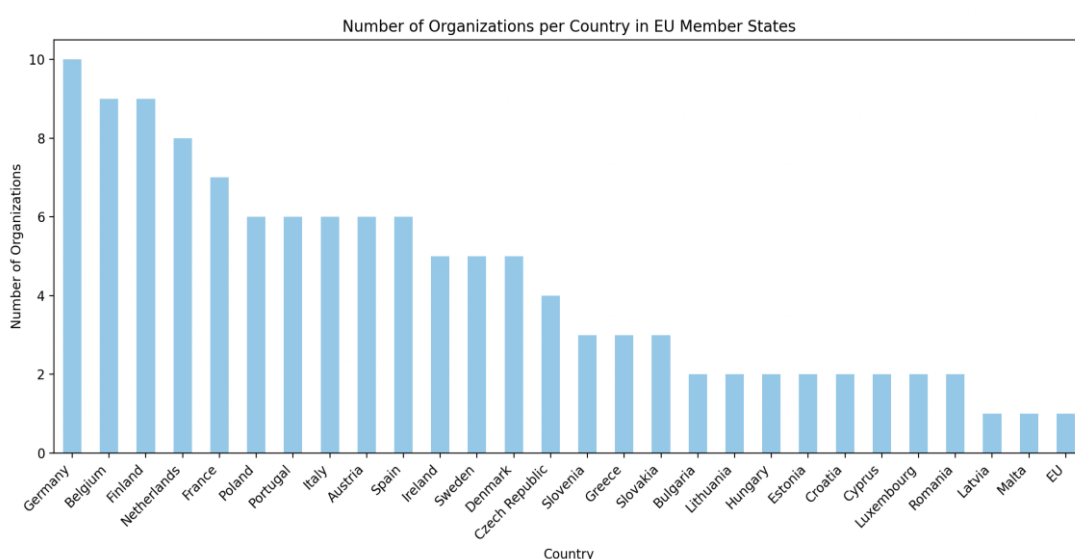


Figure 4 – Number of organisations per country in EU Member States (including proxies)

As one may notice, there is also an “EU” bar. For the sake of clarity, that indicates initiatives that are active in more than one country.

Among the proxies, the Task identified 33 national trade associations and 35 national contact points. The Task leader therefore contacted all the 68 proxies with the objective of receiving information on the existence of national initiatives (as per the definition outlined in Chapter 2. Those have been very helpful to gain insights and intelligence about each country. Moreover, in the case of Austria, a NCP (Österreichische Forschungsförderungsgesellschaft GmbH) was also part of a national initiative on Virtual Worlds. However, this outlier has been considered as national initiative for simplicity (see Annex 1 for reference).

Thanks to desk research, personal contacts of the different partners, direct contacts with the proxies identified, the Task managed to collect 65 initiatives that were eligible to be considered as national initiatives. The distribution of the initiatives can be visualised as follows:



Figure 5 – Distribution of organisations by stakeholder type (no proxies)

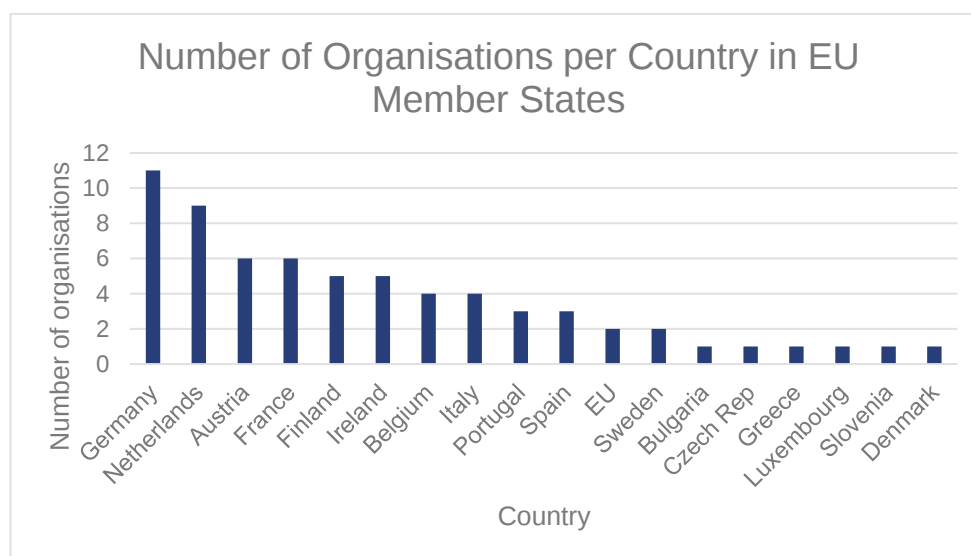


Figure 6 - Number of organisations per country in EU Member States (no proxies)

The first round of mapping managed to cover a very good area. Based on the mapping of the stakeholders, and the subsequent contacts, T5.2 managed to get positive answers that satisfied the

definition of a national initiative as outlined above in this document. As shown in the map below, the initiatives were identified in 17 Member States:

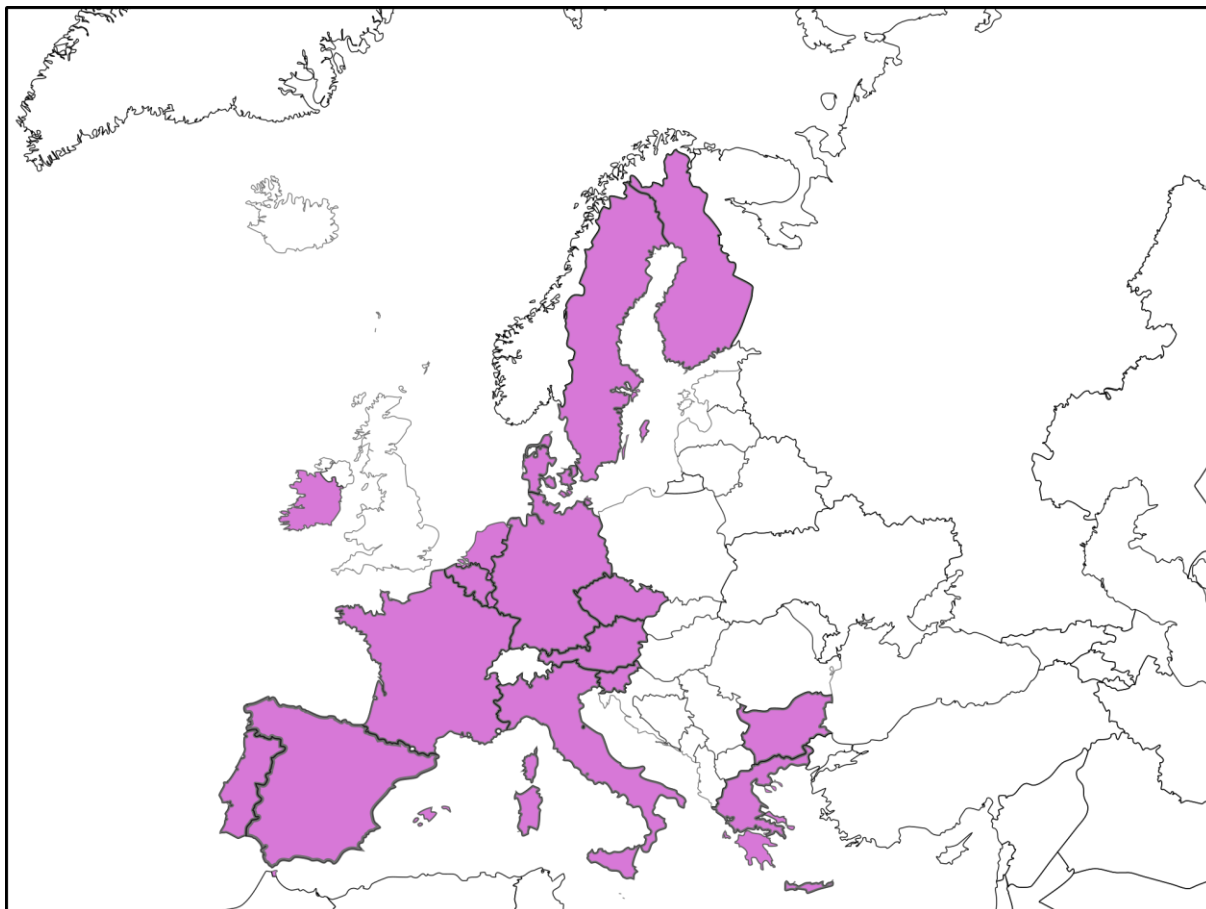


Figure 7 – EU countries with at least one initiative identified

For the 10 remaining Member States⁴, there were either negative, or no answers. In this case, these have been considered as priority countries for the next round of research.

The list of all stakeholders, including identified national initiatives and proxies, can be consulted in Annex 1.

⁴ Croatia; Cyprus; Estonia; Hungary; Latvia; Lithuania; Malta; Poland; Romania; Slovakia

4 ENGAGEMENT AND PARTICIPATION METHODS

Task 5.2 identified a series of methods that could be used for the engagement of stakeholders. Those methods are:

Instruments	Reasoning
Email outreach	Email outreach provides a scalable and cost-effective way to continue engagement, share key information, and invite participation. It allows stakeholders to engage at their convenience, making it an efficient tool for broad communication. However, emails often face low response rates and may be overlooked. For this reason, this method should be employed after the ground for a trusted relationship is laid down through one-to-one meetings. Follow-ups and integration with other methods, such as meetings or workshops, can further enhance impact and response rates.
Workshops	A well-balanced approach combining one-on-one meetings for deep engagement, email outreach for broad communication, and workshops for collective interaction ensures an effective and sustainable stakeholder engagement strategy. • Encouraging active participation: workshops involve hands-on activities, discussions, and group work, which keep participants engaged. • Fostering collaboration and networking: workshops bring people with shared interests together, allowing them to connect, exchange ideas, and build relationships that strengthen the community. • Enhancing knowledge sharing: participants learn from experts and peers, gaining insights from diverse perspectives and experiences. • Creating an inclusive space for discussion: they offer an inclusive environment where people can simultaneously discuss and openly interact. • Encouraging problem-solving: brainstorming and group discussions would help to get solutions to challenges related to the OPENVERSE Technology Framework. • Strengthening community engagement: when people actively participate in workshops, they feel more connected to the community and motivated to contribute and come to the next workshops.

Survey	Provides an approach for efficient data collection from a large number of stakeholders in a short time, and can be distributed easily via email, online forms, or even in-person. They standardised responses for comparisons. They identify stakeholder priorities and expectations and help to determine what matters most to groups of stakeholders (e.g. classified by building blocks). And finally, they are cost cost-effective and scalable compared to in-person meetings or workshops, surveys are relatively inexpensive. They can reach a broad audience, across different geographical locations. The main drawback is that the ecosystem is flooded by surveys from different initiatives and projects and manage to gather significant statistical inputs is challenging.
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Table 1 – Methods selected for stakeholders’ engagement

The following sections will outline the workshop and survey tools but will not go in detail of the email outreach.

5 ACTIVITIES

5.1 WORKSHOPS

Workshops are structured, participatory sessions designed to facilitate focused dialogue, knowledge exchange, and collaborative problem-solving among diverse stakeholders. Moreover, workshops play a crucial role in community building and knowledge sharing by providing an interactive and engaging space where participants can collaborate, learn, and grow together.

Within the context of the OPENVERSE project and the broader objective of developing interoperable and inclusive Virtual Worlds in the EU, workshops serve as a vital instrument for engagement with national initiatives. By convening relevant actors through workshops, the project ensures that national perspectives are effectively represented, contributing to a coherent and collaborative approach to shaping Europe's digital and virtual future.

Specifically, they serve as a key mechanism for fostering synergies with other related European initiatives while addressing the specific project objectives OO7 and OO8 outlined in Chapter 1.1.

5.1.1 Workshop - Developing Human-Centric Virtual Worlds in Europe: National and Regional Best Practices

Based on these strengths, the Task organised on 22 January 2025 the first workshop to gather all the initiatives identified until that moment.

The 2-hour workshop titled *“Developing Human-Centric Virtual Worlds in Europe: National and Regional Best Practices”* proved to be an effective tool to gather effectively the sparse community of national initiatives across the EU.

The objective of the workshop was to foster collaboration and communication between key stakeholders at both national and regional initiative levels. The expected outcomes were providing an initial overview of the current landscape of national Virtual World initiatives, offering valuable insights into their development. Also, actionable steps to enhance collaboration and expand this ecosystem at a European level were expected. Additionally, the project aimed at raising awareness on successful initiatives and strategies that can be adapted or replicated to drive further progress.



Agenda

Time (CET)	
15:00 – 15:05	Welcome words Gabriel González-Castañé (OpenVerse / BDVA)
15:05 – 15:25	Overview of the EU policy landscape European Commission – Marta Palau Franco, Project Officer
15:25 – 15:40	Overview of OpenVerse’s strategy, assets, value of collaboration with national initiatives Gabriel González-Castañé (OpenVerse / BDVA) & Michael Bamgrover (OpenVerse / XR4Europe)
15:40 – 16:40	National initiatives on Virtual Worlds • Eimerslive (Ireland) - Camille Donegan • Inmersiva XR (Spain) – Lorena Gonzalez Lopez • Helsinki XR Centre (Finland) – Janina Rannikko • BMK & FFG (Austria) - Jakob Werni and Peter Kersch • Technology Park Ljubljana - Aleš Pevc • Createch (Bulgaria) - Yurly Popov
16:40 – 16:50	Feedback session How can one benefit from the community?
16:50 – 17:00	Closing Summary and next steps in 2025

Figure 8 - Agenda of the workshop on 22/01/2025

In the next paragraphs, the reader can learn about the dynamic of the workshop:

While Europe has seen various national initiatives driving the development of Virtual World technologies, the fragmented nature of these efforts emphasised the need for enhanced collaboration and strengthened community ties, which will help to maximise their impact.

Experts from different European countries were invited to share their experiences with initiatives working in virtual worlds. The first presentation was given by Ms. Marta Palau Franco, the Project Officer of the project, who outlined the EU policy landscape and explained the European Commission's engagement in various VR initiatives. Afterwards, the moderator shared with the audience the status quo and planned activities of OPENVERSE and provided detailed insights into some of the assets produced in the project such as the OPENVERSE Technology Framework and the Observatory for Virtual Worlds, some of the key assets of the project.

The core part featured exchanges among national initiatives on Virtual Worlds. Mr. Mark Roddy, representing the Irish Community, Eimerslive stressed the importance of international collaboration in order to avoid the repetition of undertaken actions, as some local solutions could be replicated internationally. Inmersiva XR's representative, Ms. Lorena Gonzalez Lopez identified the challenges within the current Spanish XR ecosystem, including weak communication and gender gaps. We later found out how in Slovenia sectors such as tourism and marketing are the most prominent industries

adopting XR technology, through the presentation of Mr. Ales Pevc from XR Slovenia. Ms. Janina Rannikko from Helsinki XR Centre highlighted the strength of the XR ecosystem in Finland, which aims to become a European role model for its adoption. The series of presentations concluded with the presentation of several Austrian cooperative R&D projects in which virtual reality was used to support other disciplines, by Mr. Jakob Werni and Mr. Peter Kersch (affiliated to FFG and the Austrian Federal Ministry for Climate Action, Environment, Energy, Mobility, Innovation and Technology - BMK).

The OPENVERSE webinar provided a platform for dialogue and knowledge sharing among key stakeholders involved in national and regional initiatives. Participants shared experiences and insights, working together to establish a unified approach for advancing human-centric Virtual Worlds across the continent.

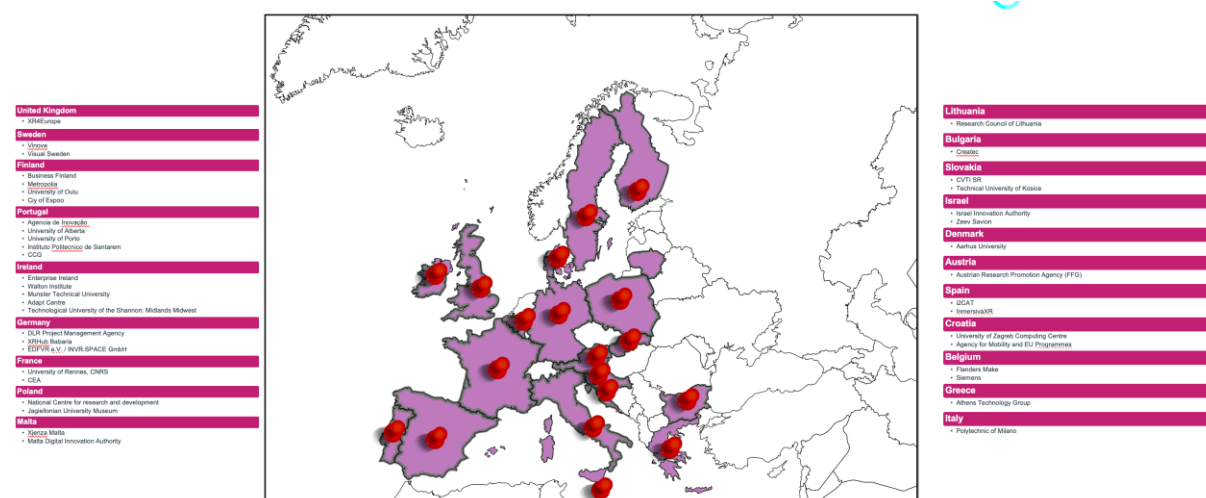


Figure 9- Visualisation of the participants according to countries

OPENVERSE's preliminary mapping of national Virtual World initiatives proved invaluable for the audience as did the webinar's collaborative approach on strategies to grow the European ecosystem. In particular, the participants appreciated the overview of ongoing projects and policies promoting Virtual World adoption.

Attendees left with a deeper understanding of the current landscape, actionable steps to foster cross-border collaboration and inspiration from successful strategies that could be adapted or replicated. The event also strengthened networks, paving the way for future community-building and innovation in the ecosystem of this highly dynamic domain.

5.1.2 Workshop - The European Partnership on Virtual Worlds: opportunities for national initiatives

On April 24th 2025, T5.2 organised a second workshop with national initiatives. The workshop's primary objectives were to promote the visibility of European initiatives across EU Member States, strengthen collaboration between national and European efforts and continue the momentum of fostering joint projects and cooperation among European actors in the Virtual Worlds space.

One of the key features of the event was a presentation by the co-programmed European Partnership on Virtual Worlds, which is working to align priorities and pool resources to drive innovation in this rapidly expanding field. Additionally, OPENVERSE presented a mapping of the current landscape of national Virtual Worlds initiatives, providing participants with an overview of ongoing efforts and projects across Europe.

During the second half of the the workshop, participants were asked to contribute to the shaping of the OPENVERSE Observatory which was, de facto, a co-creation activity of a specific asset of the project.

The participants gained important insights into the status of the co-programmed European Partnership on Virtual Worlds and a clearer understanding of the national initiatives and collaborations shaping the future of Virtual Worlds. A critical outcome of the event was also the development of actionable steps that will help to grow the ecosystem of Virtual Worlds initiatives at a European level, as well as fostering stronger networks to encourage community building and innovation.

The workshop was targeted at a wide array of stakeholders involved in Virtual Worlds initiatives across Europe. This includes associations, NGOs, technology platforms and collaborative partnerships working on Virtual Worlds at national level as a central theme or focus area. The workshop gathered a total of 90 participants.

5.2 SURVEYING ACTIVITIES

During M16, a survey was developed to gather insights into the various priorities, instruments, and challenges related to Virtual Worlds at the EU Member States level. Created by participants in Task 5.2, the survey will be distributed after M18, with its findings documented in Deliverable D5.2.

The survey is addressed to all the types of organisations that could be considered as national initiatives based on the definition given in Chapter 2. The survey aims to gather knowledge on the different priorities, instruments, challenges on Virtual Worlds at national levels.

Participants are asked questions to know more about their organisation, and to understand the importance given by the different national initiatives to the multiple technologies related to Virtual Worlds and have insights on the current situation in the respondents' countries. Specifically, those questions refer to:

- Share insights to national priorities or agendas for Virtual Worlds implementation in the respondents' countries
- Share insights on funding instruments to promote Virtual Worlds in the respondents' countries
- Gaps in technologies present in the respondents' countries
- Exports of technologies (excellence of a specific sector) in the respondents' countries
- Ranking the different technological areas/building blocks identified under chapter 3 of D5.3 in accordance with the importance of those to enable Virtual Worlds
- Which technologies are considered pivotal for implementing Virtual Worlds in the near future
- What kind of frameworks or standards are used or deemed important in the development of Virtual Worlds
- What challenges are envisaged in the adoption of Virtual Worlds in the respondents' countries

6 CONCLUSIONS AND WORK AHEAD

Task 5.2 has defined its scope and goals, as well as provided a definition and categorisation of national initiatives. Based on the methodology described in this document, T5.2 delivered an initial mapping of national initiatives, identified across multiple EU countries. The mapping of the stakeholders and their consequent engagement allowed the project to start build a solid network of national initiatives across the EU.

Looking beyond T5.2 objectives, this Task is contributing to O07 and O08 of the project (see Chapter 1.1). Additionally, throughout the execution of the Task, it became clear that T5.2 can support other endeavours of the OPENVERSE project with the perspective from the EU Members States' level. Namely:

- **To support IPR and standardisation efforts:** by aligning with existing and emerging EU policies and standards to ensure compliance and promote harmonisation in Virtual Worlds development across the EU, in coordination with *T3.5 IPR and Governance Models for Open and Human Centric virtual worlds* and *T6.1 Input to industry standards*.
- **To ensure sustainability and future growth:** by establishing the foundation for continuous support and expansion of the OPENVERSE technology framework beyond the project finalisation by identifying key contributors and viable operational models.

Given this framework of action within the broader picture of OPENVERSE objectives and activities, T5.2 has already identified a set of needs, challenges and trends from the Member States' perspective that may be interesting, if not useful, for the project. These are outlined below.

6.1 NEEDS, CHALLENGES AND TRENDS

The insights shared during the workshop -described in chapter 5.1- were important to frame the general situation of Virtual Worlds development across the different EU countries. The discussions have proven useful to get a glimpse in the reception and development of such technologies at local level.

For example, it has been highlighted that lack of awareness, high costs, regulatory challenges and a lack in technical skills and technology transfer are among the main challenges for Virtual Worlds initiatives across the EU. In parallel, participants agreed that the main gaps refer to a lack of cohesive guidance, for example an association that would promote use cases, promote industry collaboration and skills development. Moreover, technical gaps have also been identified, such as ownership of technical platforms, better access to experimental resources and stronger security and interoperability.

Finally, the participants gave insights on the Virtual Worlds areas that would benefit the most from regional cooperation. This is a key question that has driven the organisation of the workshop with National initiatives, and that will help shaping the work ahead OPENVERSE. Thus, training and education, R&D, content creation, hardware development and access, as well as better access to EU policies are all among key topics that shall be addressed when looking at cross-EU cooperation on Virtual Worlds.

6.2 WORK AHEAD

Based on the initial network of National initiatives and the insights gathered, the follow-up strategy is to establish regular workshops organised by OPENVERSE for several reasons. First, it will strengthen the relationship between national Virtual Worlds-related entities (associations, hubs, clusters, and initiatives) and the OPENVERSE project. Second, these workshops will support the identification and engagement of more national programmes and initiatives. Third, they will enable knowledge sharing across initiatives, disseminating and strengthening the project's key deliverables such as the Observatory and the OPENVERSE Technology Framework, while fostering sustainable engagement beyond the project's completion.

The workshops will:

- Facilitate ongoing dialogue between national stakeholders and OPENVERSE.
- Increase awareness of the OPENVERSE project and its long-term impact.
- Liaise with the European Partnership on Virtual World and support its establishment and growth.

The workshops will be organised as online calls, each with a pre-announced topic. The workshops will involve OPENVERSE experts, as well as representatives of other organisations (e.g. the European Partnership on Virtual Worlds, the European Commission etc) and will also serve as a stage for the different national initiatives to present and promote their work and best practices.

The workshops will be invitation-only, as participants will be drawn from previously identified national entities, particularly those that have attended prior OPENVERSE online workshops. These include may include:

- XR Associations & Clusters: IMMERSIVA XR, Eirmersive, XR Hub Bavaria, Baltic Film and Creative Tech Cluster, Helsinki XR Center, XR Wallonia, XR Valley, XRBB, EDFVR, XR Polska, CreaTech Bulgaria, XRS Bulgaria, XR Vienna, EuroXR, VRARA Lisbon & Porto, CNXR, AFXR.
- Other Key Technology Stakeholders: Experts in cloud computing, human-computer interfaces, 5G & 6G, digital twins, AI, and related fields, selected for their relevance to virtual worlds and the Strategic Technology Framework. For example, Siemens, Enterprise Ireland, Austrian Research Promotion Agency (FFG), Business Finland, CEA, Malta Digital Innovation Authority, Portuguese Innovation Agency, Research Council of Lithuania, Vinnova, Athens Technology Center, CCG/ZGDV Institute, Flanders Make, SETU, University of Oulu.

The full list of initiatives can be found in Annex 1. This however represents the status-quo at the month of writing (M18). The list of initiatives is a living document, and the final list of initiatives engaged will be delivered via D5.2 at M36.

Each workshop will focus on a strategic topic of interest of the community, aligning with the OPENVERSE objectives and deliverables. An initial proposal of topics of interest is:

1. **The European Partnership on Virtual Worlds: opportunities for national initiatives** (collaboration proposal to PPP – organised shortly before the submission of this deliverable)
2. **The Business Models of Virtual Worlds: Challenges & Opportunities** (collaboration proposal to WP1 and WP3)
3. **Towards the Strategic Technology Framework: Industry Perspectives** (with experts from T5.1)
4. **Best Practices in National Virtual Worlds Ecosystem Development** (Focus on the national initiatives that are part of the OPENVERSE network of stakeholders)

5. OPENVERSE Observatory: Insights and Data Sharing (collaboration proposal to WP2 and WP6)

The 5 topics above have been presented and approved by the partners. However, as a contingency plan, other topics have been selected as fall-back options in case some of the above would need to be changed:

1. Virtual World Partnership updates
2. Updates from High Level Governance Meetings
3. Governance & Ethics in the Metaverse (Collaboration proposal to WP3 and XR4HUMAN)

The expected outcomes of this strategy are:

- Strengthened ties between national Virtual Worlds organisations and OPENVERSE.
- Increased input into the Observatory and Strategic Technology Framework.
- A vehicle for real-time feedback from national stakeholders.
- A bi-directional communication and information flow: from national landscape to the EU and vice-versa.
- Broader awareness and engagement with the upcoming VW PPP.
- Enhanced visibility of OPENVERSE findings within national ecosystems.

Moreover, this strategy will unfold in alignment with other OPENVERSE Work Packages such as all the Tasks within WP5 – Collaboration and Synergies, but also:

- WP6 – Impact Creation: Enhancing visibility, sustainability and influence of OPENVERSE beyond its completion.
- WP4 – Communication and Dissemination: Engaging key stakeholders in discussions on project outcomes.
- Any other WP with tangible outcomes and deliverables

The strategy for the workshop series plays a crucial role in ensuring that OPENVERSE has a lasting and impactful presence in supporting the development of European Virtual Worlds ecosystems that are aligned with the EU strategy on Virtual Worlds and Web 4.0.

1 ANNEX 1 – LIST OF PROXIES AND NATIONAL INITIATIVES

Name	Stakeholder Type	Virtual World BB	Proxy	Country	Website
Aavit	National trade association	All	Yes	Czech Republic	https://aavit.cz/en/
Adigital	National trade association	All	Yes	Spain	https://www.adigital.org/
Afnum	National trade association	All	Yes	France	https://www.afnum.fr/
Agefe	National trade association	All	Yes	Portugal	https://www.agefe.pt/
Agoria	National trade association	All	Yes	Belgium	http://www.agoria.be/
Ametic	National trade association	All	Yes	Spain	http://www.ametic.es/
Anis	National trade association	All	Yes	Romania	http://www.anis.ro/
Anitec-Assinform	National trade association	All	Yes	Italy	http://www.anitec-assinform.it/
Apsi	National trade association	All	Yes	Luxembo urg	http://www.apsi.lu/
Bitkom	National trade association	All	Yes	Germany	http://www.bitkom.org/
GZS	National trade association	All	Yes	Slovenia	http://www.gzs.si/

OPENVERSE | D5.1: Report on link to national programmes and initiatives (V1)

Cytea	National trade association	All	Yes	Cyprus	http://www.citea.cy/
HGK	National trade association	All	Yes	Croatia	http://www.hgk.hr
Dansk Erhverv	National trade association	All	Yes	Denmark	https://www.danskerhverv.dk/engelsk/
DI Digital	National trade association	All	Yes	Denmark	http://digital.di.dk/
Digital Poland	National trade association	All	Yes	Poland	https://cyfrowapolska.org/en/
Fiar	National trade association	All	Yes	The Netherlands	http://www.fiar.nl/
Infobalt	National trade association	All	Yes	Lithuania	https://infobalt.lt/
Internet offensive	National trade association	All	Yes	Austria	http://www.internetoffensive.at/
ITAS	National contact point	All	Yes	Slovakia	http://www.itas.sk/
IT Branchen	National trade association	All	Yes	Denmark	http://www.itb.dk/
ITL	National trade association	All	Yes	Estonia	http://www.itl.ee/
IVSZ	National trade association	All	Yes	Hungary	http://www.ivsz.hu
KIGEIT	National trade association	All	Yes	Poland	http://www.kigeit.org.pl/

OPENVERSE | D5.1: Report on link to national programmes and initiatives (V1)

NL Digital	National trade association	All	Yes	The Netherlands	http://www.nldigital.nl
Numeum	National trade association	All	Yes	France	https://numeum.fr/
PIIT	National trade association	All	Yes	Poland	http://www.piit.org.pl/
Secimavi	National trade association	All	Yes	France	http://www.secimavi.org/
Sepe	National trade association	All	Yes	Greece	http://www.sepe.gr/
Technology industries of Finland	National trade association	All	Yes	Finland	http://techind.fi/
Tech Sverige	National trade association	All	Yes	Sweden	https://www.techsverige.se/
Technology Ireland	National trade association	All	Yes	Ireland	http://www.technology-ireland.ie/
Teknikforetagen	National trade association	All	Yes	Sweden	https://www.teknikforetagen.se/
zvei	National trade association	All	Yes	Germany	http://www.zvei.org/
Österreichische Forschungsförderungsgesellschaft GmbH (FFG linked to Austrian federal ministry BMK)	National contact point	All	No	Austria	http://www.ffg.at/

NCP Brussels hosted by hub.brussels	National contact point	All	Yes	Belgium	https://ncp.brussels/
NCP Flemish Region hosted by Flanders Innovation & Entrepreneurship	National contact point	All	yes	Belgium	https://ncpflanders.be/
NCP Wallonie	National contact point	All	yes	Belgium	https://www.ncpwallonie.be/
Institute of Information and Communication Technologies – Bulgarian Academy of Sciences	National contact point	All	yes	Bulgaria	http://www.iict.bas.bg/EN/
University of Zagreb, University Computing Centre	National contact point	All	yes	Croatia	https://www.obzoreuropa.hr/
Research & Innovation Foundation	National contact point	All	yes	Cyprus	http://www.research.org.cy/
Technology Centre Prague	National contact point	All	yes	Czech Republic	https://www.tc.cz/en
Danish Agency for Science, Technology and Innovation	National contact point	All	yes	Denmark	http://www.dasti.dk/

OPENVERSE | D5.1: Report on link to national programmes and initiatives (V1)

Danish Agency for Science and Higher Education	National contact point	All	yes	Denmark	http://www.dasti.dk/
Estonian Research Council	National contact point	All	yes	Estonia	http://etag.ee/
Business Finland	National contact point	All	yes	Finland	https://www.businessfinland.com/
Research Council of Finland	National contact point	All	yes	Finland	https://www.aka.fi/en/
Ministère de l'Enseignement Supérieur, de la Recherche et de l'Innovation	National contact point	All	yes	France	https://www.horizon-europe.gouv.fr/
DLR Project Management Agency	National contact point	All	yes	Germany	https://www.nks-dit.de/en/home
NKFIH - Nemzeti Kutatási, Fejlesztési és Innovációs Hivatal	National contact point	All	yes	Hungary	https://nkfi.gov.hu/
Enterprise Ireland	National contact point	All	yes	Ireland	http://www.enterprise-ireland.com/
Latvian Council of Science	National contact point	All	yes	Latvia	http://lzp.gov.lv/
The Research Council of Lithuania	National contact point	All	yes	Lithuania	https://europoshorizontas.lt/

OPENVERSE | D5.1: Report on link to national programmes and initiatives (V1)

LUXINNOVATION GIE	National contact point	All	yes	Luxembourg	http://www.luxinnovation.lu/
Malta Council for Science and Technology	National contact point	All	yes	Malta	http://www.mcst.gov.mt/
Netherlands Enterprise Agency	National contact point	All	yes	Netherlands	https://www.rvo.nl/subsidies-financiering/horizon-europe
Instytut Podstawowych Problemow Techniki Polskiej Akademii Nauk	National contact point	All	Yes	Poland	http://www.kpk.gov.pl/
National Centre for Research and Development	National contact point	All	Yes	Poland	https://www.kpk.gov.pl/
Instytut Podstawowych Problemow Techniki Polskiej Akademii Nauk	National contact point	All	Yes	Poland	http://www.kpk.gov.pl/
Agência Nacional de Inovação	National contact point	All	Yes	Portugal	https://www.ani.pt/
National Institute for R&D in Informatics	National contact point	All	Yes	Romania	http://www.ici.ro/
Centrum vedecko-technických informácií	National contact point	All	Yes	Slovakia	https://www.cvtisr.sk/en.html?page_id=58

OPENVERSE | D5.1: Report on link to national programmes and initiatives (V1)

CVTI SR	National contact point	All	Yes	Slovakia	https://eraportal.sk/horizont-europa/
Ministry of Higher Education, Science and Innovation	National contact point	All	Yes	Slovenia	https://www.gov.si/drzavni-organi/ministrstva/ministrstvo-za-visoko-solstvo-znanost-in-inovacije/
Centro para el Desarrollo Tecnológico Industrial	National contact point	All	Yes	Spain	http://www.cdti.es/
Vinnova	National contact point	All	yes	Sweden	https://www.vinnova.se/m/horisont-europa/
PCN Italia	National contact point	All	yes	Italy	https://pcnitalia.mise.gov.it/index.php/it/
National Documentation Centre	National contact point	All	yes	Greece	https://www.ekt.gr/en
CitiVERSE	EDIC	All	No	EU	https://living-in.eu/news/ldt-citiverse-edic-fact
Helsinki XR Center	Incubators	XR	No	Finland	https://helsinkixrcenter.com/
XR Landscape Austria	Research centre or group	XR	No	Austria	https://xr-austria.org/
Game Stage	Association	XR	No	Austria	https://www.gamestage.at/
SUBOTRON	Association	XR	No	Austria	https://subotron.com/aboutcontact/

OPENVERSE | D5.1: Report on link to national programmes and initiatives (V1)

XRVienna	Community	XR	No	Austria	https://xrvienna.at/
XR Valley	Association	XR	No	Belgium	https://www.xrvalley.be/
CreaTech	Community	XR	No	Bulgaria	https://www.createch-bulgaria.com/
EuroXR	Community	XR	No	EU	https://www.euroxr.org
AVRAR	Association	XR	No	Czech Republic	https://avrar.cz/en
FIVR	Association	XR	No	Finland	https://fivr.fi/
CNXR	Association	XR	No	France	https://cnxr.fr/
VR BUSINESS CLUB	Association	XR	No	Germany	https://vrbusiness.club/?lang=en
XR Hub Bavaria	Association	XR	No	Germany	https://xrhub-bavaria.de/
EDFVR	Association	XR	No	Germany	https://edfvr.org/
XRBB (Berling Brandenburg)	Association	XR	No	Germany	https://extendedrealitybb.org/?fbclid=IwAR2LulEVMvWycyzBsc2PeBABUFax4pDsdUel4vOCTOVImBJs4_DN2z-KSpU
Next Reality Hamburg	Community	XR	No	Germany	https://nextreality.hamburg/

XR Bavaria	Association	XR	No	Germany	https://xrbavaria.de/
XR Cosmos	Association	XR	No	Greece	http://www.xr-cosmos.gr/about.php
Eirmersive	Association	XR	No	Ireland	https://www.eirmersive.com/
AVRLAB	Research centre or group	XR	No	Italy	https://avrlab.unisalento.it/
XR Salento	Community	XR	No	Italy	https://www.xrsalento.it/index
Alpa XR	Association	XR	No	Luxembur g	https://alpaxr.lu/
DutchXR	Association	XR	No	Netherlan ds	https://dutchxr.nl/
XR4REHAB	Research centre or group	XR	No	Netherlan ds	https://vr4rehab.org/
Rathenau Instituut	Research centre or group	XR	No	Netherlan ds	https://www.rathenau.nl/nl
VRDays Immersive Tech Week	Community	XR	No	Netherlan ds	https://www.immersivetechweek.co/
VR/AR Association Portugal	Association	XR	No	Portugal	https://www.thevrara.com/blog2/2019/11/28/call-for-participation-in-the-portugal-ecosystem-report

APDC	Association	XR	No	Portugal	https://www.apdc.pt/apdc/seccoes/metaverso
Technology Park Ljubljana	Research centre or group	XR	No	Slovenia	https://www.tp-lj.si/en
Inmersiva XR	Association	XR	No	Spain	https://immersivaxr.com/
XR Impact	Association	XR	No	Sweden	https://xrimpact.com/
Narrative XR	Research centre or group	XR	No	Sweden	https://visualarena.lindholmen.se/en/project/narrative-xr-lab
Finnish Metaverse Initiative	National programme	XR	No	Finland	https://www.digitalfinland.org/initiative/
Medienboard berlin- Brandenburg.	Regional programme	XR	No	Germany	Immersive (medienboard.de)
Spain Audio Visual Hub	Community	Virtual Worlds	No	Spain	https://spainaudiovisualhub.mineco.gob.es/es/home
Osservatorio Metaverso	Community	Virtual Worlds	No	Italy	https://osservatoriometaverso.it/
National Strategic Initiatives · ANI Agência Nacional de Inovação	Public administration / National agency	All	No	Portugal	https://ani.pt/en/national-strategic-initiatives/
AFXR	Association	XR	No	France	https://www.afxr.org/page/1756926-accueil

Business Finland	Public administration / National agency	All	No	Finland	https://www.businessfinland.com/
City of Espoo	Public administration / National agency	All	No	Finland	https://www.espoo.fi/en
Digital Manufacturing Ireland	Public administration / National agency	All	No	Ireland	https://www.dmireland.org/
Digitaal Vlaanderen	Public administration / National agency	All	No	Belgium	https://www.vlaanderen.be/digitaal-vlaanderen
Germany XR apprenticeship	Skills development initiative	XR	No	Germany	
Irish XR apprenticeship	Skills development initiative	XR	No	Ireland	https://xrwailes.co.uk/apprenticeships/
POM Limburg	Regional programme	XR	No	Belgium	https://pomlimburg.be/nieuws/limburgse-kmos-nemen-innovatieve-duik-in-extended-reality/
PXN (producteur experiences numerique)	Association	XR	No	France	https://www.pxn.fr/
Industrial Reality Hub	Innovation hub	XR	No	Netherlands	https://industrialrealityhub.com/
Surf NL	Non-profit organisation	XR	No	Netherlands	https://www.surf.nl/en/themes/xr-extended-reality

i2Cat	Research centre or group	XR	No	Spain	https://i2cat.net/research-topics/virtual-immersive-technologies/
VR Business Club	Association	XR	No	Germany	https://vrbusiness.club
Virtual Dimension Centre - Fellbach	Association	XR	No	Germany	https://www.vdc-fellbach.de/en/
TNO	Research centre or group	n/a	No	Netherlands	https://www.tno.nl/en/digital/digital-innovations/digital-infrastructure/how-social-xr-extended-reality-reduces/
CEA List	Innovation hub	Digital Twins	No	France	https://list.cea.fr/en/
CNR-ISTI (Visual Computing Lab)	Research centre or group	XR	No	Italy	http://vcg.isti.cnr.it/
CNRS	Research centre or group	XR	No	France	https://gdr-igrv.fr/
Austrian federal ministry BMK (linked to FFG)	Public administration / National agency	Virtual Worlds	No	Austria	https://www.bmk.gv.at/en/ministry/organisation.html
Into CPS	Research centre or group	Digital Twins	No	Denmark	https://into-cps.org/
Bundesministerium fuer Bildung und Forschung (Federal Ministry of Education and Research)	National programme	Virtual Worlds	No	Germany	https://www.interaktive-technologien.de/foerderung/bekanntmachungen/var2

INRIA	Research centre or group	XR	No	France	https://www.vie-publique.fr/rapport/286878-mission-exploratoire-sur-les-metavers
Flanders Make	Research centre or group	XR	No	Belgium	https://www.flandersmake.be
ADAPT	Research centre or group	XR	No	Ireland	https://www.adaptcentre.ie/
d-real	Skills development initiative	XR	No	Ireland	https://d-real.ie/
Click NL (CIIC programme)	National programme	XR	No	Netherlands	https://www.clicknl.nl/en/immersive-content/
Topsector ICT	National programme	Virtual Worlds	No	Netherlands	https://topsector-ict.nl/en/