



Sustainable Blue
Economy Partnership

ROLLING TRANSNATIONAL ACCESS CALL TO RESEARCH INFRASTRUCTURES

Enabling pan-European access to marine and maritime Research Infrastructures to foster innovation, capacity building and the transition towards a sustainable blue economy



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TRANSNATIONAL ACCESS CALL TO RESEARCH INFRASTRUCTURES ROLLING CALL, IN BRIEF

DISCLAIMER: This Transnational Access (TA) Call to Research Infrastructures (RIs) is intended as a *groundbreaking* action in the framework of a European Partnership programme to demonstrate the added value of the transnational shared access to RIs for the transformation towards a sustainable blue economy. This pilot activity starts to fill gaps of the uneven distribution of access to infrastructures and introduces an impact-oriented approach to research and innovation (R&I), support knowledge and data sharing and dissemination across Europe. The Sustainable Blue Economy Partnership will offer the opportunity to use a RI, but no other expenses will be reimbursed. Therefore, the organisation submitting an application will have to illustrate the feasibility of the projects by declaring availability of own resources.

This Call text, prepared under the relevant tasks of the Partnership and including input by the European Commission, has been validated by the RI providers and approved by the General Assembly of the Partnership.

The experience gained in the development of this TA Call will be useful to inform possible updates under each cut-off, duly adapting contents and procedures.

WHAT

The **European Sustainable Blue Economy Partnership (hereafter the Partnership)** is launching **an open rolling call for access to Research Infrastructures (RIs)**, inviting private and public organisations to submit impact-oriented R&I proposals to use the portfolio of RIs made available by providers that are partners of the Partnership, by contributing to the objectives of the Partnership. The call is inspired by the Transnational Access schemes with specific constraints, i.e. while access to the RIs is offered, the implementation of the project is self-funded.

RIs providers, being partner of the Partnership, will make available a portfolio of RIs of the following typologies:

- *Research Vessels*
- *Fixed platforms, auxiliary devices and experimental stations*
- *Mobile platforms (AUVs, gliders, aircraft)*
- *Portable equipment*
- *Analytical labs and Test benches (pressure chambers, pools, calibration/inter-calibration bench, including sample analysis)*
- *Digital Facilities (high Performance Computing Infrastructures, data centres, satellite communication stations)*

The RIs of the portfolio are offered to public and private selected groups of users of the blue economy pan-European community, i.e. researchers, engineers and technical staff of research organisations, private companies, non-profit organisations etc. **submitting a successful proposal to the 2026 TA Call to RIs.**

WHO

PROVIDER: An organisation offering access to its own RI in the TA Call. The Provider designates a keyperson for contacts referred to as ‘RI provider contact point’ (see **Annex A**).

USER: A user is the entity / group of subjects that accesses a RI. For this Call and the technical parts of the submission form, the term USER is associated with the Team members of the organisations requesting access to the RI, and whose proposal is selected for implementing the access.

APPLICANT: General term used for indicating either person or organisation presenting a proposal.

PRINCIPAL INVESTIGATOR (PI): Leader of each organisation applying to the TA Call, either as Project Leader (i.e. Partner 1 of the Project) or as Project Partner.

TEAM MEMBER OR USER TEAM: Staff of the Project Leaders / Project Partners involved in the proposal.

PROJECT LEADER: Organisation coordinating the proposal. It must be from one Country of the Partnership.

PROJECT PARTNER: Organisation participating in the proposal. , which may be established in any country worldwide SUSTAINABLE BLUE ECONOMY

PARTNERSHIP (or PARTNERSHIP): Pan-European R&I initiative, joined by

Member States, Associated and Third Countries together with the EU Commission to support the transition towards a sustainable blue economy by 2030, launching the second 2026 TA Call for RIs.

TA MANAGEMENT WORKING GROUP (OF THE PARTNERSHIP): Technical secretariat in charge of: (i) collecting and dispatching the proposals to the evaluators; (ii) checking and adapting the work plans (feasibility and timeline) of the selected proposals together with the RIs' owners; (iii) organising and facilitating the meetings of the International Evaluation Panel (IEP); (iv) communicating to the applicants the result of the evaluation; (v) supporting the selected projects and the RI providers in resolving any possible dispute that may arise; and (vi) supporting the smooth implementation and follow-up of projects, at first by facilitating the signature of the user-provider agreement.

INTERNATIONAL EVALUATION PANEL OF THE TA CALL TO RIs (IEP): Group of independent international scientific and technical experts from the relevant research areas covered in this call, including experts in ethics and in RIs' management, in charge of the evaluation of the proposals.

GENERAL ASSEMBLY OF THE PARTNERSHIP: Decision-making body of the Partnership. It is joined by all members of the Partnership. Only full beneficiaries have voting rights with a maximum of two voting members per country.

EXECUTIVE COMMITTEE OF THE PARTNERSHIP: Operational body for the execution of the Partnership composed of all Work Packages' leaders and co-leaders, assisting the other Consortium for the implementation of the activities.

HOW

- > Consult the catalogue (<https://www.bluepartnership.eu/transnational-access-call-research-infrastructures>) and the relevant RI provider¹
- > Draft your proposal and submit it on the on-line platform (<https://proposals.etag.ee/sustainable-blue/>)
- > Receive the feedback from the evaluation
- > If successful, sign the provider-user agreement
- > Implement the project through access to the selected Research Infrastructures (RIs), in accordance with the access modality indicated in the proposal.

WHEN The Partnership's Transnational Access Call to Research Infrastructures (RIs) will remain continuously open for a period of 24 months, from February 2026 to February 2028.

¹ *Given the long-term nature of the Rolling Call, the list of Research Infrastructures (RIs) made available by the Partnership may be subject to updates and modifications over time. Applicants are therefore invited to always consult the most recent version of the RI Catalogue before preparing or submitting a proposal.*

Proposals can be submitted at any time via the EPSS platform, and they will be evaluated at regular cut-off intervals every four months. Cut-off dates will be clearly published on the Partnership website.

Applicants are encouraged to consult the website regularly to verify:

- *the next evaluation cut-off deadline;*
- *updates on RI availability;*
- *possible thematic focus updates for each cut-off.*

Following each cut-off:

- *results of the evaluation will be communicated **four months after the cut-off**;*
- *projects will start **within six months from the evaluation results**, subject to confirmation by the RI provider.*

All projects must be completed no later than **October 2029**, in line with the overall SBEP timeline.

1. CONTEXT AND OBJECTIVES

The Partnership enhances the science-policy interface in marine and maritime domains at both EU and international levels by aligning national, regional, and EU R&I priorities. It fosters deep collaboration between science, industry, policy, and civil society, building bridges across disciplines and sea basins.

Its strategic priorities are closely aligned with key EU and international frameworks, including:

- the EU Biodiversity Strategy for 2030²;
- the Farm to Fork Strategy³ and Zero Pollution Action Plan⁴;
- the EU Mission “Restore our Ocean and Waters by 2030”⁵;
- the Circular Economy Action Plan⁶;

² [Biodiversity strategy for 2030 - Environment - European Commission](#)

³ [Farm to Fork Strategy - Food Safety - European Commission](#)

⁴ [Zero Pollution Action Plan - Environment - European Commission](#)

⁵ [Restore our Ocean and Waters - Research and innovation](#)

⁶ [EUR-Lex - 52020DC0098 - EN - EUR-Lex](#)

- the communication on “Transforming the EU's Blue Economy for a Sustainable Future”⁷;
- the newly launched EU Ocean Pact, fostering multi-actor commitment for a sustainable ocean⁸;
- the *European Strategy on Research and Technology Infrastructures*⁹, which establishes a renewed framework for sustainable and digital research infrastructures, reinforcing transnational access.
- and global frameworks such as the UN Decade of Ocean Science for Sustainable Development (2021–2030)¹⁰ and the G7 Future of the Seas and Ocean Initiative¹¹

According to the official figures for 2022, the established sectors of the EU Blue Economy directly employed close to 4.82 million people, generated about EUR 890.6 billion in turnover and EUR 250.7 billion in gross value added (GVA).. Furthermore, the estimates suggest that

⁷ [COMMUNICATION FROM THE COMMISSION TO THE EUROPEAN PARLIAMENT, THE COUNCIL, THE EUROPEAN ECONOMIC AND SOCIAL COMMITTEE AND THE COMMITTEE OF THE REGIONS](#)

⁸ [EUR-Lex - 52025DC0281 - EN - EUR-Lex](#), https://eur-lex.europa.eu/legal-content/EN/ALL/?uri=comnat:COM_2025_0281_FIN

⁹ [The European Strategy on Research and Technology Infrastructures - Research and innovation](#)

¹⁰ <https://www.unesco.org/en/decades/ocean-decade>

¹¹ <https://www.g7fsoi.org/>

the EU Blue Economy sectors continued to grow in 2023, contributing EUR 263 billion to the EU GVA, and employing 4.88 million persons¹².

Recent analyses show that sustainable management and innovation in ocean sectors could significantly boost food security, biodiversity, job creation, and resilience to climate change. Leveraging the Digital Twin of the Ocean (DTO) will be pursued in alignment with the objectives of the Strategic Research and Innovation Agenda (SRIA 2024).

These objectives are structured under three overarching Pillars:

Pillar 1 – A blue economy in harmony with nature

1. Enhancing the scientific basis for the sustainable use of living and non-living marine resources.
2. Fostering collaboration with the private sector and industry to understand their capacity, needs, and trade-offs for increased pressures from use and multiuse of the ocean and seas in the face of a changing climate and associated extreme events, e.g. in relation to port developments, dredging, and maritime security.
3. Introducing innovative technological and circular developments, which follow the 'Rethink, Refuse, Reduce, Reuse, Recycle, Repair' principle (e.g. in R&I of materials).
4. Nature-based Solutions (NbS) for sustainable use and protection of marine ecosystems against eutrophication, harmful algal blooms (HAB), non-indigenous species, hazardous substances, litter, introduction of anthropogenic energy (underwater noise, light), overfishing, and physical damage to benthic and pelagic habitats, thereby restoring biodiversity.

¹² European Commission: Directorate-General for Maritime Affairs and Fisheries, Borriello, A., Calvo Santos, A., Feyen, L., Ghiani, M. et al., The EU blue economy report 2025, Publications Office of the European Union, 2025, <https://data.europa.eu/doi/10.2771/2333701>

5. Improving the monitoring of the health of our ocean and seas in concordance with the Marine Strategy Framework Directive (MSFD; Good Environmental Status criteria, GES) requirements of the assessment and predictable frameworks for the industry. Better understanding of (cumulative) impacts of (blue) economic activities from shallow areas to the deep sea in all European seas to improve effectiveness of measures.
6. Contributing to understanding and quantifying the ecosystem responses to climate change and direct and indirect anthropogenic pressures on the European sea basins at relevant spatial and temporal scales and in line with the specific requirements of the MSFD assessment framework, e.g. further development of existing and new indicators and related reference and threshold values forming baselines for activities at sea.
7. Delivering FAIR data (including socioeconomic and socioecological) and science-based recommendations for coherent ecosystem-based management, including Marine Protected Areas (MPAs), Maritime Spatial Planning (MSP) and multi-use of marine spaces.
8. Contributing to the development of tools to support maritime spatial planning (MSP), such as sensitivity mapping or modelling of cumulative impacts.
9. Promoting standardisation in innovation and procurement processes to scale up the application of new solutions at higher Technology Readiness Levels (TRL).
10. Enhancing and optimising the cost-benefit ratio of ocean and seas' modelling and observation capacities, including fostering the development of sensors, sensor networks and marine robotics, as well as by means of artificial intelligence (AI) and machine learning tools. This will include advancing digital twin technologies and supporting the European Digital Twin of the Ocean (EDITO) initiative.
11. Contributing concretely to alignment of national efforts to strengthen activities along the ocean observation value chain and data management and avoid duplication and fragmentation, including innovative governance concepts, e.g. demonstrating the value of ocean observation to society and removal of outdated regulations blocking transformation.

Pillar 2 – Blue economy solutions towards climate neutrality

12. Developing marine Nature-based Solutions (NbS) to improve resilience to natural disasters, increase natural capital, and restore ecosystems.
13. Fostering the carbon sequestration capacity and resilience of coastal and marine environments ('blue carbon'), including related management actions and preventing carbon seepage to the atmosphere caused by humans.
14. Supporting knowledge production and evidence-based recommendations for ocean and coastal resilience by quantifying at regional-scale and across basins the impacts of climate change and related stressors.

15. Supporting inventions for upscaling innovation in the renewable ocean energy sector (e.g. wind, wave and tidal energy) and focusing on solutions that reduce the use of energy, materials, and other resources and the impact on marine life.
16. Enabling novel materials and technologies for sustainable manufacturing and product lifecycle management.
17. Developing sustainable and cost-efficient solutions for construction, maintenance, reuse of multi-use offshore platforms.
18. Designing green and smart ports, blue marinas and transport.
19. Contributing to innovative and sustainable concepts for small- and medium-sized vessels and recreational boating.

Pillar 3 – A thriving blue economy for the people

20. Promote efficient and sustainable use of bioresources through biotechnology, AI, machine learning, digital twins and ICT. This includes value chain co-development and optimisation within the blue bioeconomy and biotechnology to reduce waste and ensure safe, healthy, affordable, and traceable products within a circular economy.
21. Enhance safety and efficiency in maritime operations by advancing autonomous technologies for offshore operations, including underwater deployment and maintenance while reducing risks for humans and the environment.
22. Encourage product and process innovation and exploration of low trophic level bioresources, innovate sustainable seafood production systems, including offshore, closed, low- and multi-trophic aquaculture, and low impact sustainable fisheries.
23. Strengthen resilience of coastal communities and sectors through preparedness for climatic, geological, and anthropogenic hazards, while analysing community needs, building diverse employment opportunities, and formulating sustainable tourism models valuing coastal and maritime heritage.
24. Promote human health and safety by generating knowledge that helps mitigate risks from marine-borne pathogens, toxins, harmful algae, toxicants, and pollutants.
25. Ensure equitable benefit-sharing in marine activities, including biodiscovery.
26. Explore and harness the potential of blue spaces and economies to improve the health and well-being of diverse communities, ensuring equitable access and benefits.
27. Foster equity from innovation, circularity, and job creation in coastal communities.
28. Foster a community of practice (CoPr) for knowledge sharing and co-creation of skills on advancing the sustainable blue economy.
29. Promote financial instruments for inclusion (especially for disadvantaged/marginalised groups) and transparency, while ensuring accountability of key actors.

Applicants are expected to clearly demonstrate how their proposals contribute to one or more of the SRIA objectives listed above, ensuring alignment with the Partnership’s overall goals towards a sustainable, climate-neutral and resilient blue economy. Proposals should explicitly indicate the relevant Pillar(s) and Objective(s) addressed and describe how the planned activities will generate measurable impact in line with the Strategic Research and Innovation Agenda (SRIA 2024).

In addition to yearly **Joint Calls for R&I proposals**¹³, the Partnership implements a set of **structuring actions**, such as piloting access to **marine and maritime Research Infrastructures (RIs)**. These infrastructures include, among the others, research vessels, fixed and mobile platforms, high-performance computing, analytical labs, virtual labs and calibration facilities. This structuring effort capitalises on decades of European investment and cooperation on RIs. The EU Strategy Forum for Research Infrastructures (ESFRI) and successive Framework Programme projects (e.g., JERICO, Euro-Argo, Blue-Cloud, LifeWatch, DANUBIUS-RI) have laid the foundation for access mechanisms, data harmonisation and integration across basins. National RI plans are increasingly coordinated under EU guidance, enabling smoother access, shared protocols, and regional cohesion. Many of the RIs participating in this initiative are part of national or EU roadmaps (e.g. ESFRI) and have been made available through an

¹³ To date, the Partnership has launched three Joint Calls for R&I projects, co-funding a total of 43 transnational projects (19 from the first call and 24 from the second), while the evaluation of proposals submitted under the third Joint Call is currently ongoing. Further information on the funded projects is available in the Partnership’s brochures, accessible at: <https://bluepartnership.eu/projects>

open expression of interest from participating countries and organisations. Their **ESFRI or equivalent international affiliation** is indicated in the **Partnership’s Research Infrastructure Catalogue**, which provides detailed information on the infrastructures, services, and access modalities offered.

In 2024, the **G7 Working Group on the Future of the Seas and Oceans**, under the Italian Presidency, explicitly recognised marine RIs and their integration as a top priority. This was further reinforced by the **EU Council Conclusions of 29 November 2024** (“Building Bridges: Strengthening Europe’s Research and Technology Infrastructures”), which highlight RIs as strategic enablers for scientific progress, deep-tech development, talent training, and the delivery of public-good services – such as near-real-time ocean data and ecosystem monitoring.

In this framework, Research Infrastructures are not only enablers of scientific research but also strategic assets to:

- strengthen the innovation capacity of Research Performing Organisations (RPOs), start-ups, SMEs, and local industry;
- overcome regional fragmentation and enhance cooperation between countries with diverse capacities thus favouring internationalization;
- support **open science, ocean literacy**, and uptake of ocean data by decision-makers;
- promote **transnational collaboration**, technology transfer, and cross-sector innovation;
- align with initiatives such as the **Blue Skills Compact, Pact for Skills**, and the **EU Knowledge System for the Ocean**.

The creation of dynamic **user communities**, networks, and ecosystems around marine RIs enhances operational efficiency, fosters excellence, and widens participation. As part of its **widening and internationalisation strategy**, the Partnership also encourages access from countries with less-developed RI systems or those affected by barriers to marine operations (e.g. geopolitical instability or limited infrastructure, as observed in parts of the Black Sea).

The Rolling **Transnational Access (TA) Call to RIs** builds on the outcomes of the first TA Call, integrating lessons learned and feedback from the pilot phase to further streamline procedures and strengthen feasibility checks with RI providers launched by the Partnership. It allows applicants from across the pan-European and international blue economy community — including research institutions, private companies, public authorities, NGOs and more — to submit proposals requesting access to one or more RIs made available by the Partnership’s participating providers.

In line with the **Partnership’s operational priorities**, the call aims to:

- **Contribute to the implementation of the SRIA** through strategic, impact-oriented access projects;
- **Support the Partnership’s widening and internationalisation strategy**, including sea-basin and regional coverage;
- **Foster synergies** with other EU initiatives, notably the EU Mission “Restore our Ocean and Waters”, the EU DTO, and the Horizon Europe Work Programme for RIs;
- Promote **open data, open science and FAIR data principles**;

- Facilitate **technology testing, innovative service development, and SME-driven solutions**;
- Improve **skills, capacity building, and human capital development**;
- Leverage national RI investment plans and align with the **ESFRI roadmap**;
- Reinforce the **strategic-operational interface** between the Partnership and marine RIs;
- Ensure **efficient use and sharing of RIs**, enhancing value for public investment.

Ultimately, the outcomes of this pilot action will help inform the design of future calls, joint programming activities, and broader RI integration within the Sustainable Blue Economy Partnership framework.

2. DESCRIPTION OF THE CALL FOR ACCESS TO RESEARCH INFRASTRUCTURES

2.1 General requirements

Applications in this call must be impact-driven contributions to the transformation into a blue economy for a more resilient future and towards carbon neutrality targets, following an impact pathway approach. Each project should therefore describe its impacts accordingly. The possible users of the outcomes of the projects should be identified in the application.

Applications should briefly describe how they relate to the relevant strategies and initiatives described in the context and objectives of the Call (Section 1.0).

Proposals will be evaluated in terms of scientific excellence, impact and implementation (see **Annex B**), and considered eligible if contributing to at least one Strategic objective of the Partnership SRIA (see 2.2). At the same time, reflections on contributions to relevant initiatives will be appreciated as well as on stakeholders' engagement, including a broad range of actors, i.e. industry partners, citizens, and policy makers. These are indeed considered as means to enhance innovation and societal relevance and, ultimately, to promote a change and increase the impact of the projects. In the framework of dissemination, communication and outreach activities, capacity building actions, such education and training, will also be positively considered.

The projects must be developed at a pan-European level and located in European Sea basins: the Mediterranean Sea, the Black Sea, the Baltic Sea, the North Sea, the Atlantic Ocean, and other regional European areas such as Arctic Ocean, Barents Sea, Celtic Sea, Adriatic Sea, Aegean Seas, etc.

Applicants are expected to assess the projects' impact on the sea-basin(s) targeted in their proposal and address possible scalability in other basins. At the regional level, complementarities and synergies with the lighthouses of the EU Mission 'Restore our Oceans and Waters' will be requested especially for the potential joint valorisation of the outcomes of the projects. Furthermore, **the SBEP Transnational Access scheme complements existing Horizon Europe INFRA initiatives that offer access to marine and maritime Research Infrastructures (e.g. AQUARIUS, AQUASERV, POLARIN)**. These initiatives provide access opportunities that may partially overlap with the infrastructures offered within SBEP. To ensure clarity for applicants and maximise European added value, proposals are invited to:

- *indicate whether they have previously benefited from access under these initiatives;*
- *describe how the proposed access under SBEP is complementary to previous access;*
- *explain whether the new access supports a subsequent research phase, additional analyses, or broader geographic coverage.*

2.2 STRATEGIC OBJECTIVES OF THE SRIA

The Strategic Objectives of the Sustainable Blue Economy Partnership (SBEP) translate the high-level ambitions of the Strategic Research and Innovation Agenda (SRIA) into actionable priorities for access projects under this Transnational Access (TA) Call. Unlike the former *Intervention Areas*, which framed Partnership activities in 2024, the Strategic Objectives provide a **cross-cutting, enabling perspective** that addresses the technological, societal, and systemic needs required for the transition to a sustainable blue economy.

Applicants must clearly indicate in their proposals which Strategic Objective(s) their project will address, and describe how the requested Research Infrastructure (RI) access will contribute to achieving these goals. Proposals may target more than one objective, provided the contribution is substantial and well justified.

Th

Applicants should explicitly reference in their proposal which Strategic Objective(s) are addressed in Part A of the application form, ensuring that the rationale for the chosen objective(s) is clearly articulated. Proposals that demonstrate clear and measurable contributions to more than one Strategic Objective will be considered particularly valuable, provided that the requested RI access remains coherent with the overall scope of the call. In addition, the evaluation of proposals (see Annex C) will explicitly include an assessment of their alignment with the Strategic Objectives, thereby replacing the previous criterion of “fit to Intervention Areas.”

2.3 Impact of the proposals

Under Horizon Europe, the EU Members-States and Associated Countries aim to create significant societal and environmental impacts. In this context, applicants need to describe the expected impact of their R&I project that applies for RI access and how it contributes to the overall impacts defined under this call:

- *The potential for impact beyond the academic world, such as in societal, technical, environmental, economic, policy-making, or behavioural realms;*
- *How relevant stakeholders, including industry, and blue economy communities can be involved in, and/or benefit from, the design and achievement of the R&I project;*
- *To what extent the project contributes to address the enhancement of human capacity building development;*
- *How approaches for achieving impact are integrated into the project design and conducted by the team;*
- *The potential for a long-term collaboration at international level.*

One way to make such a plan is to rely on a methodology of Theory of Change (ToC) with a related Impact Pathway (IP) to describe the research process, mentioning well-specified outputs and outcomes. It is recommended to rely on this methodology to describe the expected impact of the project. Projects are encouraged to structure their impact plan according to the TOC approach. This methodology helps applicants describe how and why the proposed activities are expected to lead to desired changes, by identifying the logical sequence between **inputs, activities, outputs, outcomes and impacts**. A well-defined ToC makes explicit the underlying assumptions and external factors influencing the expected

results, providing a clear and transparent framework to monitor progress and measure impact throughout the project lifecycle¹⁴.

The credibility of the pathways to achieve the expected outcomes and impacts specified in the call text will be considered in the evaluation of the proposals.

¹⁴ For further guidance, applicants may consult the workshop provided by the Dutch Research Council (NWO): <https://impact.nwo.nl/en/working-with-an-impact-plan>

3. TECHNICAL INFORMATION ON RESEARCH INFRASTRUCTURES AVAILABLE FOR THE CALL

Transnational Access (TA) means the free of charge use of research infrastructures or installations for users selected on competitive basis. According to the TA approach, the majority of the team members (> 50%) must be employed in a country other than the country that owns and operates the infrastructure.

The Partnership offers a portfolio of 50 Research Infrastructure services through the integrated availability of the following typology of RIs:

- *Research Vessels*
- *Fixed platforms, auxiliary devices and experimental stations*
- *Mobile platforms (AUVs, gliders, aircraft)*
- *Portable equipment*
- *Analytical labs and Test benches (pressure chambers, pools, calibration/inter-calibration bench, including sample analysis)*
- *Digital Facilities (high Performance Computing Infrastructures, data centres, satellite communication stations)*

A detailed **catalogue** is available at this link: <https://www.bluepartnership.eu/transnational-access-call-research-infrastructures>.

The Partnership portfolio of RIs is made available through different access typology: physical and remote access.

- **Physical** (in person/hands-on): the presence of the user team is required/recommended during the whole operation period
- **Remote**: the requested facility is operated by the owner's staff and the presence of the user team is not required.
- **Virtual**: access is provided through digital platforms, computational infrastructures, databases, or simulation environments, where no physical presence is needed. This includes the use of high-performance computing facilities, cloud-based services, data repositories, or virtual laboratories, enabling advanced modelling, digital testing, or analysis of datasets. Please note that some providers may also enable partially remote access: the presence of the user team is required at some stage (e.g. installing and un-installing, sample collection and storage). Please contact the provider to further explore.

4. PROCEDURES, ELIGIBILITY, AND SELECTION CRITERIA

4.1 Call process

The TA Call to RIs will be advertised online from the following web pages:

- *Sustainable Blue Economy Partnership website and social media:*
 - o Website: <https://www.bluepartnership.eu/transnational-access-call-research-infrastructures>,
 - o LinkedIn: <https://www.linkedin.com/company/blue-economy-eu/>
 - o X: @BlueEconomyEU
- *Online Submission Tool:* <https://proposals.etag.ee/sustainable-blue/>
- *Relevant webpages of Partnership's partners and the European Commission as well as of other relevant EU projects/infrastructure Consortia.*

The Transnational Access (TA) Call to Research Infrastructures (RIs) under the Sustainable Blue Economy Partnership (SBEP) is implemented through a **rolling call format**, designed to ensure maximum flexibility for applicants and providers while guaranteeing transparency, fairness, and scientific excellence in the selection process.

The call will remain **open continuously for a period of 24 minimum months**, during which applicants may submit proposals at any time through the **Electronic Proposal Submission**

System (EPSS). Proposals submitted will not be evaluated on an ongoing basis but will instead be collected and assessed at **regular cut-off dates** scheduled every **four months** (see **table above at page 9**). The indicative timetable for these cut-offs, together with any updates, will be made publicly available on the Partnership website and communicated through the official channels of the Partnership Secretariat.

At each cut-off date, the following sequence of steps will be applied:

1. Submission of proposals

- Proposals submitted before the cut-off deadline are automatically time-stamped and registered by the EPSS.
- Each proposal receives a unique proposal number
- Only the most recent version submitted by the Project Leader before the cut-off will be considered; earlier drafts will be disregarded.

2. Eligibility check

- Immediately following the cut-off, the **TA Management Working Group (TA MWG)** verifies that proposals comply with the **eligibility criteria** defined in Section 4.6 of this document.
- This check ensures that proposals are complete, submitted on time, written in English, identify at least one RI provider, and include a preliminary Data Management Plan.

- Proposals not meeting the eligibility requirements are declared **ineligible** and will not proceed to evaluation. Applicants will be notified of the reasons for ineligibility.

3. Independent scientific and technical evaluation

- Eligible proposals will be evaluated in a single step and assigned to the **International Evaluation Panel (IEP)**.
- Each proposal is reviewed by at least three independent experts, selected according to their expertise in the relevant scientific field, technology domain, RI management, and ethics.
- Evaluators assess proposals against the criteria of **Excellence, Impact, and Implementation**, as described in Annex C, with explicit consideration of alignment with the **Strategic Objectives** of the SBEP (see Section 2.2).
- Evaluators complete individual assessments, followed by a consensus meeting chaired by the Rapporteurs to agree on consolidated scores and comments.

4. Consensus ranking and prioritisation

- The IEP establishes a consensus ranking of all evaluated proposals, taking into account the minimum thresholds (3/5 per criterion, 10/15 overall).
- In case of high number of applications received, projects above threshold are categorised as “High Priority” or “Low Priority” according to their overall score and strategic relevance.

- In cases of tied scores, the IEP applies additional prioritisation principles, such as maximising geographical coverage, supporting new users, balancing sea basins, and ensuring diversity across Strategic Objectives.

5. Logistic validation with RI providers

- Successful proposals undergo a feasibility and scheduling validation by the **RI provider(s)** concerned (see Annex B for provider contact points).
- This step ensures that the requested RI access is technically possible, safe, and compatible with availability (time slots, location, equipment).
- Where necessary, RI providers may propose adjustments to scheduling, suggest alternative or complementary infrastructures, or recommend integration with other projects to optimise resources.

6. Final decision and communication of results

- Following logistical validation, the IEP Chair and Vice-Chair, together with the TA MWG and the Executive Committee of the Partnership, confirm the final list of selected proposals.
- Applicants are formally notified of the outcome by official communication.
- Unsuccessful applicants will receive a summary of the evaluation report, including strengths and weaknesses of the proposal, to support possible resubmission at a later cut-off.

7. Agreement and project start

- Successful applicants are invited to enter into a **User-Provider Agreement** with the relevant RI provider(s) (see Annex F).
- The TA Mgmt WG facilitates this process and ensures that agreements are signed within the indicative timeframe.
- Projects are expected to start implementation within **six months** of the evaluation results being communicated, unless otherwise agreed due to logistical constraints.

This structured process ensures that the TA Call is **fair, competitive, transparent, and impact-oriented**, while also allowing flexibility for applicants through the rolling format. It also reflects the Partnership’s commitment to balancing **scientific excellence** with **feasibility, inclusiveness, and strategic impact** across European and international blue economy communities.

4.2 Call timetable

The Transnational Access (TA) Call to Research Infrastructures (RIs) operates as a Rolling Call, allowing applicants to submit proposals on a continuous basis within a structured framework of defined **cut-off dates**. This model ensures flexibility for applicants while maintaining transparency, predictability, and coordination with the Partnership’s overall implementation cycle.

Each phase of the Rolling Call follows a sequence of activities that includes:

- *Pre-announcement and official launch of the call and information webinar;*
- *A cut-off date for proposal submission (four months after launch);*
- *Eligibility checks, evaluation by the International Evaluation Panel (IEP), and communication of results (within four months after the cut-off);*
- *Fine-tuning and agreement phase between selected applicants and RI providers;*
- *A project execution and reporting period lasting up to 18 months from the start date of access.*

The indicative schedule for the upcoming Rolling Call phases is presented below:

Launch	Cut-off	Evaluation & Communication of	Project duration and reporting
11 February 2026 – Pre-announcement 20 February 2026 – Official Launch	20 June 2026	October 2026	Access and project execution from November 2026 to April 2028
June 2026 – Second Launch Window	October 2026	February 2027	Access and project execution from March 2027 and August 2028

Launch	Cut-off	Evaluation & Communication of	Project duration and reporting
October 2026 – Third Launch Window	February 2027	June 2027	Access and project execution from July 2027 to December 2028
February 2027 – Fourth launch window	June 2027	October 2027	Access and project execution from November 2027 to April 2029
June 2027 – Fifth Launch Window	October 2027	February 2028	Access and project execution from March 2028 to August 2029
October 2027 – Sixth Launch Window	February 2028	June 2028	Access and project execution from July 2028 to October 2029 ¹⁵

Table 2 Rolling SBEP TA Call to RIs Timetable

Each cut-off will be followed by an evaluation cycle coordinated by the TA Management Working Group and the International Evaluation Panel (IEP). Results will be validated by the RI Providers and communicated to applicants shortly after the IEP meeting.

Any changes to this timetable will be communicated through the official channels of the Partnership and published on the website: <https://bluepartnership.eu>.

¹⁵ *The final phase will conclude by **October 2029**, corresponding to an overall duration of approximately **16 months** from the start of access (instead of the standard 18 months). This shorter timeframe ensures alignment with the official end of the Sustainable Blue Economy Partnership project and the closure of its contractual and reporting obligations.*

4.3 Confidentiality and conflict of interests

The Partnership is committed to avoiding any Conflict of Interest and safeguarding good scientific practice.

A Code of Conduct related to Conflict of Interests, confidentiality and non-disclosure is defined and applies to the representatives of the General Assembly of the Partnership, the TA Management Working Group, the contact persons of the RI providers and the International Evaluation Panel (IEP, see below paragraph). An important aspect of this code is the avoidance of any conflicts between personal and applicants interests.

Representatives of the Partnership’s General Assembly and relevant support bodies (TA Management Working Group and International Evaluation Panel)

The representatives of the General Assembly of the Partnership, the TA Management Working Group and the IEP will perform their work impartially and take all measures to prevent any situation where the impartial and objective implementation of the work is compromised for reasons involving economic interest, political or national affinity, family or emotional ties or any other shared interest (‘conflict of interests’).

The following situations will automatically be considered as a conflict of interest:

1. Involvement in the application process

- *Being involved in any proposal and in the preparation of any proposal, either as PI and team member or being involved in the publication or exploitation of the results;*
- *Having submitted a proposal as a PI or a team member, under the call;*

2. *Relationship towards the applicant*

- *Being a director, trustee or partner or in any way involved in the management of an applicant;*
- *Being employed or contracted by one of the applicants;*
- *Having close professional proximity, e.g., being a member of the same scientific institution with a hierarchical or department relation or impending change of the IEP member to the institution of the applicant in a position with a hierarchical or department relation or vice-versa;*
- *Having close family ties (spouse, domestic or non-domestic partner, child, sibling, parent etc.) or other close personal relationships with the applicants (PIs and team members) or being involved in the publication or exploitation of the results of the proposal;*
- *Having implemented with an applicant (PIs and team members) joint projects or joint publications within the past three years (e.g., have co-authored and published an article with an applicant during the last three years);*
- *Having (or having had during the last three years) a close scientific collaboration with an applicant (PIs and team members) of the proposal;*
- *Having (or having had) a relationship of scientific rivalry or professional hostility with an applicant (PIs and team members) of the proposal;*
- *Having (or having had), a mentor/mentee relationship specifically with a Principal Investigator of the proposal;*

- *Having a current or prior (in the last three years) activity in advisory bodies of the applicant's institution, e.g., scientific advisory boards;*

3. Personal interest

- *Having direct or indirect benefit if any proposal submitted is accepted or rejected;*
- *Having personal economic interests in the funding decision.*

Other situations preventing the IEP members from participating in the evaluation impartially could be considered a conflict of interest and should be reported as such by the IEP members.

Applicants of a proposal submitted under this SBEP Rolling TA Call to RIs (including the PIs and team members) may not serve as IEP members.

Beneficiaries/affiliated entities of the Partnership being RI providers and participating in this TA Call to RIs

Research teams of some beneficiaries/affiliated entities of the Partnership, or specific research teams of a partner where applicable, that are providers of RIs may participate in this SBEP Rolling TA Call to RIs. For those partners, firewall measures have been foreseen to mitigate the risk of, perception of, or de facto conflict of interest or unequal treatment of applicants, including clear segregation of duties.

To ensure complete transparency and inform the recipients of calls, the organisations that are RIs providers and partners of the Partnership's Consortium who may apply to the SBEP Rolling TA Call to RIs are explicitly listed in **Annex A 'CONTACT POINTS'**, emphasising their compliance with the firewall measures. Their involvement in the preparation, selection and follow-up/monitoring of the calls is regulated as follows:

- Preparation of the TA Call: *The RI Providers support the identification of the relevant framework rules embedded in this Call and the drafting of the standard template of the agreement regulating the relationship between the providers and the users. In this regard, they also validate the final text of the TA Call to RIs*
- Selection of projects: *Following the finalisation of the evaluation procedure by the IEP, the contact points of the RI provider organisations for which the RI has been requested, listed in Annex A, will oversee the validation of the ranking list with specific regard to the technical feasibility of the proposal and are thus impeded to apply to this [Rolling SBEP TA Call to RIs]. They can also be consulted in case a dispute is put forward e.g. by an applicant on the outcome of the evaluation.*
- Follow-up of Projects: *Providing the subscription of or compliance with the user-provider agreement, RI Providers can request specific information to the users. Also the TA Management Working Group can make inquiries about the state of play.*

Furthermore, the following firewall measures apply: (i) an organisation from a given country is not allowed to request access as Project Leader to a RI run by an organisation of the same country, under this TA to RIs Call; (ii) the majority (> 50%) of the team members must be employed in a country other than the country that owns and operates the infrastructure.

Concrete measures to avoid potential Conflicts of Interest or unequal treatment of applicants are ensured.

4.4 Publishable information

A list of the projects for which access to RIs will be granted will be published at the end of the call process (once the projects have been selected) on the Partnership website. Therefore, applicants should be aware that the following information from the proposals may be published by the Partnership and RI Providers for promotional purposes: (1) Project Title and Project Acronym, (2) Publishable short abstract, (3) Main Research Infrastructure requested for access, (4) Duration of the project, (5) Total costs of the project, (6) Organisation name and country of each Partner, (7) Name of the PI.

The Partnership, through the dedicated TA Management Working Group, will subsequently handle projects approved for access. Those will be governed by the confidentiality rules according to the provision of the user-provider agreement.

4.5 Privacy policy

By applying, the PIs and team members agree to the use, share (for specific purposes: *e.g.*, evaluation, for the future nomination of experts, Partnership-specific communication) and the storage of projects-related information according to the Privacy Policy and the General Data Protection Regulation (GDPR). The Online Submission Tool presents further information on the Privacy Policy at this link <https://proposals.etag.ee/sustainable-blue/>

4.6 Eligibility criteria

Applicants to the Rolling SBEP TA Call to RIs can be employed by an organisation in any country of the world. It must be noted that access for team members of a proposal selected for access with a majority of Partners not working in an EU Member State or Horizon Europe Associated country is limited to 20% of the total amount of units of access provided.

The organisations can be any legal entity including public organisations, private companies, non-profit organisations, etc. Participation of legal entities from third countries (not Member States nor associated to Horizon Europe) shall be demonstrated as essential for the implementation of the action.

Proposals must comply with the following 14 strict **general eligibility criteria**:

Scope

1. *Proposals must address **at least one specific objective** of the SRIA*
2. *Proposals must formulate a clear **request of access to at least one and up to two RIs**.*
3. *Proposals must address **at least one geographical area** among: Mediterranean Sea, Black Sea, Baltic Sea, North Sea, Atlantic Ocean. If applicable, proposals must indicate regional areas (e.g. Arctic Ocean, Barents Sea, Celtic Sea, Adriatic Sea, Aegean Seas, etc.) or their scope must be proved to be relevant for one or more above mentioned geographical areas.*

Feasibility

4. *The PIs of the Project Leader and Partners must declare the feasibility of the project as far as regard the self-funded component. by agreeing the declaration of commitment of the*

Team
composition

submisison portal The applicant, through the Project Leader PI, must confirm the consensus by the RI provider on the feasibility of the proposal.

- 5. International cooperation - Proposals must involve at least two Partners from two different countries and requesting access to a beneficiary making RIs available as provider. Not all team members shall necessarily access the infrastructure and can be involved in other activities in support to the project, also considering the availability of RI provider.*
- 6. Firewall measure - The Project Leader PI and the majority (> 50%) of the team members must be employed in a country other than the country that owns and operates the infrastructure. They cannot apply for access to a research infrastructure from their own country.*
- 7. Firewall measure - An organisation being RI provider cannot be Leader/Partner in a proposal requesting access to the same RI it owns/runs. Users-providers' synergies are anyway encouraged and can be outlined as part of the user-provider agreement.*
- 8. Firewall measure - The Project Leader PI and the majority (> 50%) of the team members must be employed in a country other than the country that owns and operates the infrastructure. They cannot apply for access to a research infrastructure from their own country.*

Example 2: If an application is requesting access to an infrastructure based in Germany 1 to be located on/used together with another infrastructure based in Spain 2, the PIs and the majority (> 50%) of team members must be employed in a country other than both Germany and Spain(1 and 2).

Example 1: A PI based in Germany is entitled to apply for access to all of the listed RIs, except the RIs run in Germany, and/or any piece of equipment provided in Germany.

Principal Investigator (PI) of the Project Leader

9. *In each proposal, one entity must act as the Project Leader.*
10. *The PI of a given entity submitting a proposal can act as PI of the Project Leader (coordinator) only in one proposal per cut-off. He/she can apply as PI/team member of a Project Partner in other proposals under the same cut-off. A PI of a Project Leader whose proposal was not selected may resubmit a revised proposal at a subsequent cut-off."*

Duration of the requested access

11. *The access must be **initiated within 6 months** from the reception of the outcomes of the evaluation and **terminated within 18 months** from the starting date.*

Proposals submission

A single-step process will apply, with a mandatory submission of proposals. Proposals must be:

12. *Written in English.*
13. *Submitted electronically with the Electronic Proposal Submission System (EPSS) before the set deadlines at <https://proposals.etag.ee/sustainable-blue/> (instructions for electronic submission will be available on the Partnership website at <https://www.bluepartnership.eu/transnational-access-call-research-infrastructures>) in February 2026.*

14. Complete, respectful of the page limits and the number/type of attachments allowed, including CV template (to be filled in online) that are in line with sound principles for research assessment according to the proposal form (Annex C) and information provided in the EPSS.

Table 2 – SBEP Rolling TA Call to RIs general eligibility criteria

When applying to this call, applicants must be aware that their proposals must meet the general eligibility criteria as summarised in Table 2.

A proposal that does not fulfil all the general eligibility criteria reported above will be considered ineligible, declined from any further review and not considered for access to any RIs.

Any change in the Partners' composition must conform to the general eligibility criteria defined in this section and be validated by the TA Management Working Group.

Proposals that fulfil all requirements i.e., general eligibility criteria, will enter the evaluation process described in **Annex B**. The TA Management Working Group will communicate the results of the eligibility check and the decisions taken to the PI of the Project Leader after the completion of the evaluation procedure.

4.6.1 Recommendations for the applicants

Collaborative applications from teams and institutions where no equivalent RI exist are strongly encouraged, as well as applications from female, young and early career scientists. International and/or industrial partners are welcome.

All partners within a team should take into consideration the following recommendations for setting up their project proposals:

Scope:

- *Proposals should go beyond the state of the art by providing high-quality R&I and, when appropriate, make use of innovative technologies, approaches, and concepts to do so;*
- *Proposals should be scientifically excellent and relevant to policies framed under the Blue Economy and consider ongoing research activities funded by other EU Missions, INFRA projects, European RI Consortia, other instruments, programmes, or projects. Cooperation with these activities is of high importance to avoid redundancy, favour complementarity and increase synergies;*
- *Proposals should highlight the added value of the requested RIs to address the challenges outlined in the strategic objectives of the SRIA and are recommended to address more than one objective valuing opportunities for cross-fertilisation;*
- *Proposals should contribute to cross-cutting themes such as the open data policy, development of capacity-building activities and ocean literacy activities, promote the inclusion of young people in the activities and knowledge transfer, follow partnership communication guidelines using a common visual identity, to promote equal opportunities for participation of women and men in the research consortia and comply with EC ethics self-assessment principles;*
- *Where applicable, proposals are strongly encouraged to envisage fertilisation measures across sea-basins, including by covering a broad geographic scale (i.e.,*

more than one sub-sea basin) and/or considering the impact of the projects on other EU sea basins.

Team composition:

- *All proposals are encouraged to consider the geographical balance of the applicants and the implementation in appropriate geographic settings and according to the objectives of the proposal, including in low- and middle-income countries/regions, and less-performing countries; a particular consideration for PIs/team members working in countries/regions where no equivalent infrastructures exist or are presently unavailable for use is also encouraged.*
- *It is encouraged to involve stakeholders from the blue economy community (i.e., SMEs), industries, authorities, public administrations, associations, as well as civil society organisations) at the appropriate scale. Stakeholder engagement in the research projects will enhance innovation, policy, and societal relevance and ultimately the impact of the projects;*
- *All proposals should integrate the gender dimension¹⁶ of R&I activities;*

Budget:

- *Successful applicants will be granted free access to the selected RIs. The cost for using the RIs are co-funded by the Partnership, the European Commission and the RI provider.*

¹⁶ https://erc.europa.eu/sites/default/files/document/file/GEPs_in_HE_guidelines.pdf

- No other costs of the project nor personnel effort/travel/shipping of equipment or any other support will be provided to the members of the team. Therefore, the feasibility of the project through own resources shall be proved.

Data management:

Applicants are expected to clearly address data management aspects within their proposal, ensuring that research data are handled according to Open Access and FAIR (Findable, Accessible, Interoperable and Reusable) principles. A sound data management approach should describe how data will be collected, stored, shared, and preserved, while considering ethical, legal, and security requirements.

For further guidance, applicants may consult the European Commission's resources on Open Access and FAIR data: https://research-and-innovation.ec.europa.eu/open-science/open-access_en.

Please note: A formal Data Management Plan (DMP) will be requested at a later stage, following project selection or during the early implementation phase, to ensure compliance with the Partnership's open data and FAIR principles. **The DMP must be submitted within 3 months from the signature of the User–Provider Agreement. An updated version of the DMP may also be requested during project implementation, in order to ensure compliance with FAIR principles and alignment with evolving data workflows.**

4.6.2 Ethical issues

The TA Management Working Group will include the evaluation of compliance with relevant ethical criteria. Applicants should always describe any relevant ethical aspects in their research plans. If a research permit or a statement by an ethics committee is required for the implementation of the project, applicants should provide information on the permits or permit proposals.

Applicants are required to adhere to the principles of good scientific practice and to follow the European Code of Conduct for Research Integrity by ALLEA¹⁷ (All European Academies) and the Global Code of Conduct for Research in Resource-Poor Settings¹⁸. Projects must comply with the 'Do no significant harm principle'¹⁹. Furthermore, in case of physical access to a RI, any investigation will be observed and carried out in accordance with the general principles of the 'Code of Conduct for Responsible Marine Research in the Deep Seas and High Seas of the OSPAR Maritime Area'²⁰, regardless of the area of operation.

Any proposal which seems to contravene fundamental ethical principles will not be selected and may be excluded from the selection procedure by the IEP. Judgment of the significance

¹⁷ <https://allea.org/code-of-conduct/>

¹⁸ <https://www.globalcodeofconduct.org/>

¹⁹ <https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/support/faq/15485>

²⁰ https://www.ospar.org/site/assets/files/1357/mou_isa.pdf

of ethical issues will be made by using the criteria published by the European Commission in its guidelines on How to Complete your Ethics Self-Assessment²¹.

4.7 Submission procedure

A single step procedure will apply to this Access Call; the submission of proposals is mandatory.

Proposals must be submitted electronically using the Electronic Proposal Submission System (EPSS): <https://proposals.etag.ee/sustainable-blue/>

Instructions for electronic submission will be available on the Partnership website at <https://www.bluepartnership.eu/transnational-access-call-research-infrastructures>, in February 2026.

For any technical questions regarding the submission procedure using the EPSS, please contact the SBEP EPSS technical helpdesk: epss.sbep-ris@g.etag.ee.

Please note that:

- *The online system may experience high traffic volumes in the last hours before the submission deadline, and it is therefore highly recommended to submit the final*

²¹ https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/common/guidance/how-to-complete-your-ethics-self-assessment_en.pdf

version of the proposal well in advance of the deadline to avoid any last-minute technical problems;

- *The submission system will close at 11:00 CEST on each cut-off date. Applicants are strongly encouraged to submit their proposal well in advance of the cut-off.*
- *Please note that the TA Management Working Group can provide support only during standard working hours (09:00–17:00 CEST) on working days. No support can be guaranteed after 17:00 CEST on the cut-off date. Proposals submitted after 11:00 CEST will automatically fall into the next evaluation cycle. Requests for extensions of the deadline due to last-minute technical problems will not be considered. Any proposals not correctly submitted by the cut-off deadline will not be considered for the current evaluation cycle. Applicants may revise and resubmit their proposal for the next cut-off.*
- *Applicants may submit their proposal early and continue refining or replacing it until the cut-off date. Only the latest submitted version will be considered. Early submission is highly recommended to avoid last-minute congestion and technical limitations.*

4.7.1 Submission of a Proposal (mandatory stage)

Applicants must submit proposals within the established deadline and according to the procedure illustrated below. It is not possible to enter the procedure at a later stage.

A proposal eligibility check will be carried out by the TA Management Working Group, based on the general eligibility rules. The eligible proposals will be sent to the scientific evaluation at the international level.

Submission on the EPSS:

- *The Principal Investigator (PI) of the Project Leader creates an account on the EPSS (<https://proposals.etag.ee/sustainable-blue/>);*
- *The Project Leader can enter, edit and save the electronic forms, add team members, indicate the required infrastructure(s) (up to max 2), upload the project description (12 pages maximum) and submit the proposal. Partners can enter and edit their own data only.*
- *All PIs of the Project Partners shall create an account and log into the EPSS to provide the information required for the participation;*
- *All information must be written in English. The proposal is a self-contained document. Links and hyperlinks are not allowed;*
- *Information entered or uploaded on the platform can be updated until the submission deadline.*

4.8 Evaluation of proposals

Access to any infrastructures offered by the Partnership will be regulated according to the Excellence-driven access mode. This mode of access is dependent on the scientific excellence, originality, quality and technical and ethical feasibility of an application evaluated through peer review conducted by IEP. Only scientifically top-ranked proposals will be considered for the logistical fine-tune, ensuring that only excellent proposals are considered for access.

The TA Management Working Group in supporting the IEP will apply the principles of transparency, fairness and impartiality. The TA Management Working Group accompanies the proposals throughout the different steps of the evaluation process and – if the proposal is successful – even afterwards for the access and reporting.

A single-step procedure will apply for the proposals' evaluation.

4.8.1 The International Evaluation Panel

4.8.1.1 Selection of reviewers

The TA Management Working Group will establish an International Evaluation Panel (IEP) for access to RI upon input of the RI providers, the General Assembly of the Partnership as well as making profit of the portfolio of evaluators of the transnational Joint Calls #1 and #2 and/or

the portfolio of evaluators from other relevant RI TA projects/networks (e.g. Science Europe²², the European Marine Board²³, EurOcean²⁴, etc.).

The composition of evaluation panels will consider the gender and geographical balance.

The IEP will comprise international scientific and technical experts from the relevant research areas covered in this call, including experts in ethics. The IEP composition should allow covering, as far as possible, the range of intervention areas of the present call as well as consider RIs' management competences.

The experts examine the proposal(s) assigned to them, score and comment each proposal following strictly the Evaluation Criteria (see **Annex B**) using an individual Proposal Assessment Form.

IEP members will have to sign a confidentiality, non-disclosure and conflict of interest policy and will have to declare all their potential conflicts of interest with submitted proposals (Declaration of Confidentiality and Conflict of Interest Form). The TA Management Working Group will also check that no conflict of interest exists concerning the proposals evaluated.

IEP members cannot be applicants in the joint call and cannot evaluate proposals with which they declared a conflict of interest, to ensure a fair evaluation process and equal treatment of applicants. The IEP will be headed by a Chair and a Vice-Chair. The Chair and the Vice-

²² <https://scienceeurope.org/>

²³ <https://www.marineboard.eu/>

²⁴ <https://eurocean.org/>

Chair will be regular members of the IEP with the added duties of moderating the IEP meeting and conveying the results of the discussions through the TA Management WG to the RI providers for validation and to the General Assembly for information.

The Chair and Vice-Chair of the IEP will be selected from a country not represented within the RIs providers to avoid as much as possible conflicts of interest. Members take part in the IEP as independent experts and do not represent any organisation, nor can they send any replacements. This means that their work on this Panel does not represent any organisation or nation.

4.8.1.2 Review process

All eligible proposals will be subject to a scientific evaluation by three IEP members, one of the IEP members will be nominated as a rapporteur. They must assess the proposal and prepare individual evaluation reports, in advance of the IEP meeting while the rapporteur prepare a Proposal Assessment Summary Form (PASF). Information about the assessment criteria and scoring of proposals are detailed in **Annex B**.

During the IEP consensus meeting, the evaluation results for each proposal will be presented by the rapporteur. The IEP will discuss the proposals, agree on the final individual score for each criterion and the overall score for each proposal and establish the final ranking of proposals based exclusively on the set of criteria defined. With the support of the TA Management WG and the Executive Committee of the Partnership. In case of large number of proposals received and deemed eligible projects over the threshold will be set by the Chair and Vice-Chair of the IEP to the 'High' or 'Low' priority category. Proposals falling in the category A will then be ranked by infrastructure according to their overall score.

The decisions of the IEP should be taken collectively, preferably by consensus or by a simple majority of the panel members in case consensus cannot be reached. The IEP will produce a final Evaluation Summary Report for each proposal, which will be transmitted to the applicants.

In case of a dispute that may occur with an applicant, e.g. in relation to the ranking list, the IEP can be asked by the TA Management WG, if needed supported by the Executive Committee of the Partnership, for a binding opinion.

5. AGREEMENT BETWEEN THE RI PROVIDERS AND THE PROJECT LEADERS

Projects granted for access to RIs need to be concluded within 18 months from the starting date. It is necessary for user and RI provider to sign an agreement for the implementation of the activity, providing an implementation plan and list of duties. The Partnership, through the TA Management Working Group, will assist users and providers in this process.

It is up to the Partners to decide whether to make a formal agreement among themselves.

5.1 Specific Access Conditions/Funding

Access is offered by the Partnership through the relevant Partners being RI providers and making available the RI they operate. The Partnership does not support any costs of the project nor personnel effort/travel/shipping of equipment. Projects activities will need to be self-funded.

5.2 Formalisation of the agreement between the providers and the users of the RIs

Before accessing to the requested RI, the **Project Leader** on behalf of all Partners is required to **sign the user agreement with the RI provider (see Annex D)**. The TA Management Working Group should also be notified of the signed agreement.

6. PROJECT IMPLEMENTATION AND REPORTING

For the whole duration of the project, it is the responsibility of the Project Leader to inform the RI provider and the TA Management Working Group about any changes in the project, i.e., modifications of the work plan or the project team.

Any financial issue is under the responsibility of each Partner involved in the selected project

6.1 Communications, meetings and reports

The Project Leader, on behalf of the Partners, should **communicate** to the TA Management Working Group **the starting of the activities**. The access projects must be completed within a maximum of 18 months. They are part of an international research programme for which some joint activities may be organised, with reference to those providing networking and future collaboration opportunities, including remote and in-person meetings/workshops/events and contribution to communication and dissemination. Also, RIs providers can be invited to such gatherings. A **final meeting**, preferably on-line, with all projects will be organised for assessing the results and discussing how the activity was developed.

Besides this, on behalf of the user team, the PI will be required to submit a **digital final access report** to the relevant RI provider and the Partnership within two months after the conclusion of the project. A template will be circulated in due time by the TA Mgmt WG, including a few

reliable KPIs.. All Partners will have to deliver input for this report. The Partnership will provide a template for this task (after the starting of projects). The access report should be notified to the Partnership.

The TA Management Working Group will check and validate the report with possible support of experts from the IEP.

6.2 Data Policy

In compliance with the EU's General Data Protection Regulation (2016/679)²⁵ (GDPR) and with specific regard to personal data, data protection is regulated as detailed in the relevant document published in the EPSS platform addressing data provided to the Partnership and the purpose of processing of these data for (1) application submission, (2) application evaluation by an independent International Evaluation Committee, (3) application eligibility check, (4) monitoring and evaluation of the call process, (5) general use of the EPSS.

In terms of data generated by the projects, specific data policy will be further regulated in the user-provider agreement if needed.

²⁵ <https://eur-lex.europa.eu/eli/reg/2016/679/oj/eng>

6.3 Acknowledgments and Dissemination requirements

Dissemination of project outputs is the responsibility of the Partners. Measures for dissemination of the results must be described in the proposal and are considered in the evaluation procedure. This can be organised in the form of various communication routes such as (contribution to) scientific papers, posters, course or training material, web-based tools, stakeholders' engagement, workshops, or direct intervention towards end users, including citizens.

Further, the Partners must acknowledge the support of the Partnership under Horizon Europe in any document that is published (in written, oral, or electronic form) within the research project, mention the RI and the organisation that has provided access to the RI. In accordance with good scientific practice, users are encouraged to offer co-authorship to those working at the RI having made genuine scientific contributions to their work²⁶.

RIs providers and users must ensure that all outcomes (publications, etc.) of TA to RIs projects include a proper acknowledgement of the Partnership. All the publications resulting

²⁶ In line with the European Charter for Access to Research Infrastructures", November 2024,

<https://op.europa.eu/en/publication-detail/-/publication/ec4692ae-ac6f-11ef-acb1-01aa75ed71a1>

from the TA projects must be published in adherence to the EC Open Science Policy²⁷ but for private companies and SMEs.

²⁷ https://research-and-innovation.ec.europa.eu/strategy/strategy-research-and-innovation/our-digital-future/open-science_en

ANNEX A – RESEARCH INFRASTRUCTURES’ PROVIDERS CONTACT POINTS

ANNEX B – EVALUATION PROCEDURE AND CRITERIA

ANNEX C – GUIDELINES FOR APPLICANTS AND PROPOSAL FORM

ANNEX D – USER-PROVIDER STANDARD AGREEMENT TEMPLATE