



POLARIN

POLAR
RESEARCH
INFRASTRUCTURE
NETWORK

POLARIN TRANSNATIONAL
ACCESS

INFORMATION FOR TA USER
GROUPS

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1. NEGOTIATION

The negotiation phase takes place before the access implementation and is done in collaboration with the RI(s) where access is granted and the User Group Leader (UGL). The negotiation phase consists of agreeing on the access dates, choosing the method of travel costs reimbursement, signing the contracts and preparing for the access implementation.

1.1. ACCESS DATES, POSTPONEMENTS, TEAM MEMBER CHANGES

The RI Operator confirms the timing of the access implementation with the UGL during the negotiation phase.

Postponement of the access implementation. Postponement of the access implementation can be granted only once per User Group, and in maximum by one year. The postponement must be requested and negotiated with the RI operator, and by keeping the TA management informed. The postponement is granted by the TA management, upon request by the RI operator, based on the following justifications: illness or health related issues, family issues (e.g. parental leave), logistic issues, limitations in RI availability.

Changes in User Group members. Keep in mind the Eligibility Rules ([link](#)) in case of user group member replacement. It's easiest to replace a team member with a user from the same institution as in the original proposal. Access implemented by non-eligible users will imply non-gratuity of the access. Consult the TA coordination in case of user replacements to check their eligibility for access.

1.2. USER CONTRACTS

UGL-POLARIN Agreement. The Agreement between the UGL and POLARIN is mandatory for all granted projects. It defines the general funding and access conditions, travel, logistics, and shipment costs directly associated to access, as well as aspects related to liability, scientific data, open access publication requirements, access reporting and conditions for project cancellation or suspension.

The Agreement template is available in [TAP](#) document library. Both the UGL and the UGL institution's legal representative must sign the agreement. After that, the signed agreement is downloaded into TAP to be countersigned by POLARIN.

The deadline to submit the signed agreement is a soft deadline, meaning that the TAP system remains open for submissions after the deadline. However, the Agreement signed by both the UGL institution and POLARIN must be in place before the access implementation.

User Group Leader – RI Operator Agreement. The Agreement between the UGL and RI is not mandatory and is done upon request by the RI where access is granted. The agreement defines e.g. the mandatory health checks, firearm licence, mandatory trainings, reimbursement of expenses. The UGL-RI Agreement template is provided for signature by the RI. Additional articles can be added to the Agreement depending on the RI and UGL needs.

1.1. DATA MANAGEMENT PLAN

Updates on the TA Data Management Plan are done by the UGL based on the comments and instruction provided the POLARIN Data Management lead. The comments are sent by e-mail during the first weeks of the negotiation phase, by a date indicated by the TA Management.

The updated Data Management Plan should be downloaded into TAP by the end of the negotiation phase, and in any case before the access implementation.

1.2. TRAVEL ARRANGEMENTS AND TRAVEL COST REIMBURSEMENTS

The User Group Leader is required to contact the respective RI operator before making travel arrangements for his/her user team. Advice on travel options can be obtained on request from the RI operator.

Users should then make their own travel arrangements (unless otherwise agreed with the research infrastructure operators) and keep all original tickets and receipts. The UGL must closely monitor the expenses incurred by the team participating in the access, to ensure that the expenses incurred are not exceeding the amount granted.

The method of travel costs reimbursement is selected by the RI operator that provides the access. The methods include:

1. Pre-financing (up to 80 % of the granted travel budget). Only when UGL institution is not a beneficiary in POLARIN consortium.
2. Personal travel claim. Only when the UGL personally pays the travel costs first.
3. Invoice from UGL institution to RI operator. Only when UGL institution is not a beneficiary in POLARIN consortium.

4. If the UGL is affiliated with beneficiaries in the POLARIN project, the travel, logistic and shipment expenses are first covered by the respective beneficiary and after that claimed by the beneficiary in the next POLARIN periodic reporting.

The reimbursement of costs will take place after finalizing the visit to the research infrastructure granted by POLARIN, and in any case after the submission and approval of the Access Report in POLARIN TAP (see section 1.5).

All costs incurred must be duly justified by the User Group Leader to the RI Operator within 2 months after the access takes place. Reimbursement of costs will follow the standard reimbursement policy and praxis of the RI operator. Only travel, logistic and shipping expenses directly associated with the granted RI access and up to the granted amount will be reimbursed.

2. ACCESS IMPLEMENTATION

Permits, licenses and training. UGL is responsible for applying any mandatory permits or licenses and participating in any mandatory training to conduct the research and implement the granted access.

Insurance coverage and medical checks of the TA users are under the responsibility of the TA Users and their institutions and should meet the requirements of the RI (e.g. SAR insurance and/or mandatory health check is required at certain RIs).

It is important to start the licensing and permitting process as early as possible after the access has been granted to ensure all permits and licenses are in place by the time of access implementation.

Consultation on the required licenses, permits, training, and insurance and medical checks is available upon request from the RI operator.

The access implementation on site at RI must **follow the RI's field work and safety regulations** and other practices.

Please also do not forget to contribute to the POLARIN [Ambassadors Programme](#) activities to tell the world about the excellent research you are doing!

3. REPORTING

Reporting done by the UGL. The UGL must provide a report on the implemented access in TAP within 2 months after the project implementation. The report consists of a short on-line form

with information on the access used, and a pre-structured Access Report document summarizing the scientific aspects of the used access.

The pre-structured **Access Report template** can be uploaded from the TAP document library, and downloaded back to TAP once filled in.

Access provider reporting. Once the access report has been submitted by the UGL, the access provider approves the report and access use in TAP. The RI proceeds with the travel reimbursement only after the approval of the access report.

4. PUBLICATIONS AND DATA RESULTING FROM ACCESS

In accordance with the Horizon Europe open access policy, all publications and data arising from data acquired through POLARIN Transnational Access must be made openly accessible. This obligation ensures that research funded by the European Union remains widely available to the scientific community and the public, fostering transparency, innovation, and collaboration.

Furthermore, the User Groups must comply with the POLARIN Data Policy and agree to publish their data in a trusted repository the latest within 24 months from the completion of their access and provide the DOI or relevant persistent identifier of the dataset in POLARIN TAP.

To meet the requirement for sharing your data and publications resulting from POLARIN TA, do the following:

1. Refer to the POLARIN Open Access guidelines already when planning and preparing publications and open access data.
2. Refer to the POLARIN Data Management Plan (especially p. 15-16) for specific requirements for making data openly available.
3. Follow your publication plan as in Access Report and make the data and metadata available as you have indicated in the TA DMP.
4. Publish in open access journals or deposit publications in recognized open repositories.
5. Ensure proper acknowledgment of POLARIN funding in all relevant publications.

Example acknowledgment to be used in all publications incorporating the results developed, acquired or obtained during the transnational access to the RI, whoever the author:

“This research has benefitted from transnational access to (name of Research Infrastructure) funded by the European Union HORIZON EUROPE through the EU Project POLARIN Grant Agreement ID: 101130949.”

All the above-mentioned materials and guidelines are available in TAP document library and on the [Information for TA Users webpage](#). For any additional questions regarding the open access requirement, please contact POLARIN TA management.

5. FEEDBACK SURVEY TO EUROPEAN COMMISSION

To enable the European Commission to evaluate the outcome of Transnational Access, and to improve the services provided to the scientific community, UGL is requested to complete the "User Group Questionnaire". The questionnaire must be submitted once by each user group as soon as the access at the RI(s) has been completed. The questionnaire is available at <https://ec.europa.eu/eusurvey/runner/RIsurveyUSERS>

When completing the questionnaire, please indicate the POLARIN Grant Agreement ID: 101130949 and your project acronym. You can find your project acronym from TAP.

6. CONTACT INFORMATION

You can contact the POLARIN TA management team with any questions related to your Transnational Access: polarin_ta@listserv.dfn.de

In technical matters regarding POLARIN TAP, please contact: polarin@inkode.it

In matters related to the RI where access is implemented, you can also directly contact the RI Operator. The RI contact information is available at <https://eu-polarin.eu/infrastructure/>