



# Call documentation for the AQUARIUS Transnational Access Calls

Alfred Wegener Institute

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## About this document

Title	D3.4 - Call documentation for the AQUARIUS Transnational Access Calls
Work Package	WP3 - RI Call Design, Management, Evaluation and Access Platform
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Due Date	31.10.2024, M8
Submission Date	30.10.2024
Version	<b>2.0</b>

### Dissemination Level

<input checked="" type="checkbox"/>	PU: Public
<input type="checkbox"/>	PP: Restricted to other programme participants (including the Commission)
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<input type="checkbox"/>	CO: Confidential, only for members of the consortium (including the Commission)

**AQUARIUS: Aqua Research Infrastructure Services for the health and protection of our unique, oceans, seas and freshwater ecosystems** is a Research and Innovation action (RIA) funded by the Horizon Europe Work programme topics addressed: HORIZON-INFRA-2023-SERV-01-01 - Research infrastructure services to enable R&I addressing main challenges and EU priorities. Start date: 01 March 2024. End date: 29 February 2028.



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# Table of Contents

Table of Contents.....	3
1. Introduction .....	4
2. Implementation of an evaluation system and process.....	4
2.1. Available infrastructures .....	5
2.2. Application.....	6
2.3. Terms and Conditions.....	6
2.4. Eligibility Criteria .....	6
2.5. Call promotion.....	7
3. Annex 1 – AQUARIUS Guidelines for Applicants .....	8
4. Annex 2 – AQUARIUS Research Plan Template .....	22
5. Annex 3 – AQUARIUS TAP Online Submission Guidelines .....	30
6. Annex 4 – CV template .....	40
7. Annex 5 – DMP template.....	41
8. Annex 6 – Evaluation Guidelines and Criteria .....	47

## 1. Introduction

AQUARIUS will provide a highly comprehensive suite of integrated research infrastructures appropriate to addressing significant challenges for the long-term sustainability of our unique oceans, seas and freshwater ecosystems. An impressive range of 57 research infrastructure services will be made available to include research vessels, mobile marine observation platforms, aircraft, drones, satellite, sensors, fixed freshwater and marine observatories and test sites, experimental facilities, and sophisticated data infrastructures.

Through Transnational Access (TA) funding calls, the project will facilitate access to these research infrastructures, fostering large-scale, multidisciplinary projects aimed at generating impactful results.

The AQUARIUS Work Package (WP) 3 is devoted to the Transnational Access Call Design, Management, Evaluation and the TA Access Platform within AQUARIUS. The tasks in this WP include the preparation and management of a user-friendly TA management, application and evaluation platform, the launch of the TA calls, the handling of the scientific and logistical review process, and the post-access project evaluation.

The following calls are designed for AQUARIUS:

- 1) **Call 1 – Regional Lighthouse Access Call**. This call is looking for applications that address scientific challenges in the EU Lighthouse regions.
- 2) **Call 2 – Super-integrated Lighthouse Call**. This call will be responsive and shaped by the outcomes of the first call.

It is planned that the two AQUARIUS calls will be open at the following times:

- 1) Call 1: open **11 November 2024 – 20 January 2025**
- 2) Call 2: open **2 September 2025 – 28 October 2025**

The TA calls will prioritise projects that align with the core objectives of Mission Ocean, ensuring a strong thematic and geographic focus on key regions such as the Baltic, North Sea, Black Sea, Atlantic/Arctic, and Mediterranean, along with their associated river systems.

## 2. Implementation of an evaluation system and process

The AQUARIUS proposal evaluation system is based on evaluation structures, procedures and best practices from previous Transnational Access projects (e.g. EUROFLEETS 1, 2 & Plus; ARICE; INTERACCESS; JERICO, JERICO-NEXT, JERICO-S3 and ASSEMBLE Plus).

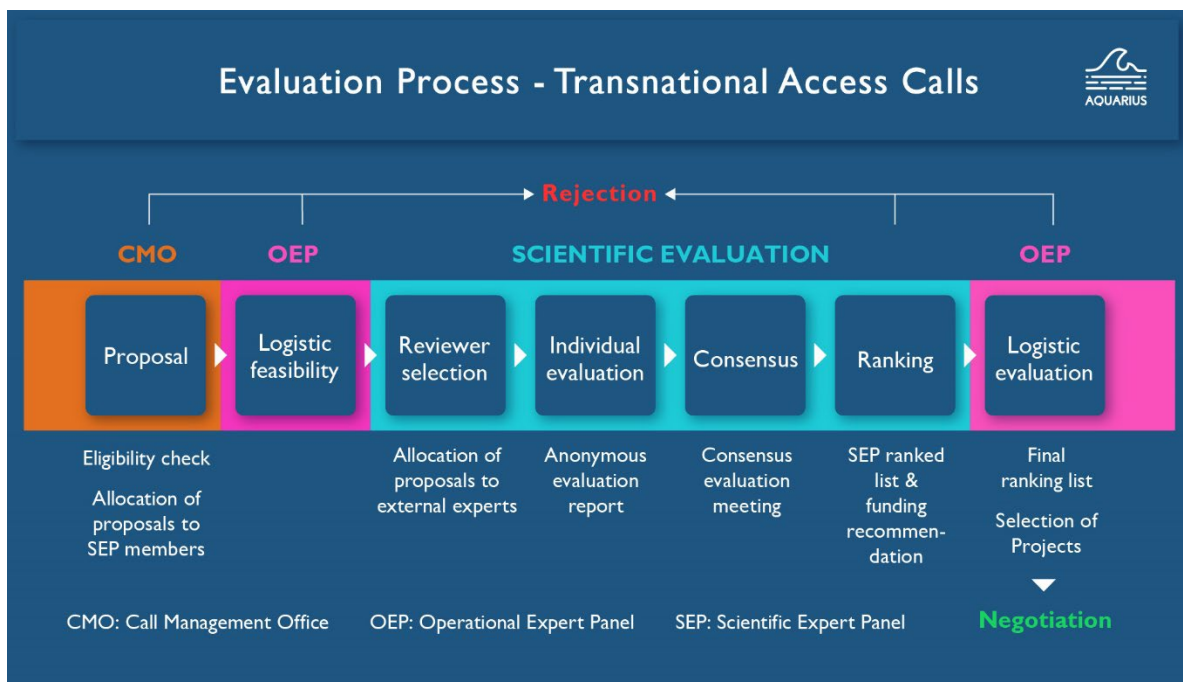
Proposals submitted to the AQUARIUS calls are evaluated both scientifically and logistically:

1. **Scientific Evaluation:** Proposals are first evaluated scientifically by at least two scientific experts (referees). The evaluations are overseen by a Scientific Expert Panel (composed of at least three scientific experts or referees), which ensures that the process is open, transparent, merit-based, impartial, and fair, strictly following the principles of equal opportunity. The panel also considers the alignment of the application with call topics and infrastructure integration. A

consensus is reached by the Scientific Expert Panel as the final decision-making body.

2. **Logistical Feasibility Evaluation:** After the final recommendation of the Scientific Expert Panel, high-ranked proposals are examined by the AQUARIUS Operational Expert Panel to determine the logistical feasibility of the proposed work. The decisions are finalized by the infrastructure operators, based on the recommendations from both the Scientific and Operational Expert Panels.

This evaluation process ensures that only scientifically excellent proposals are considered for funding. The selection of user groups is based on scientific excellence, and only those proposals that are highly ranked scientifically are considered for logistical evaluation and funding.



**Figure 1:** Work flow and different steps involved in the AQUARIUS evaluation procedure.

Details about the evaluation workflow and the evaluation criteria are given in the "Evaluation guidelines and criteria" in Annex 6.

### Contact point:

The email address [aquarius.eu@awi.de](mailto:aquarius.eu@awi.de) was established to serve as a contact point for scientists requesting information related to the calls and evaluation procedure.

## 2.1 Available infrastructures

The infrastructures offered in AQUARIUS are categorised in the following nine categories:

- 1) Research Vessels
- 2) Marine Mobile Observation Platforms
- 3) Fixed Marine Facilities
- 4) Experimental Research Facilities
- 5) River & Basin Supersites

- 6) Aircrafts
- 7) Drones
- 8) Satellite Services
- 9) Data Centers & Virtual Labs

For more information on AQUARIUS TA calls and on the infrastructure capabilities, schedule and geographic areas offered visit the infrastructure catalogue at <https://aquarius-ri.eu/ri-catalogue/>.

## 2.2 Application

The submission of proposals is through the AQUARIUS [Transnational Access Platform \(TAP\)](#), a customised, user-friendly, online platform for AQUARIUS' TA applications. It will be based on the INTERACCESS platform, an online application system developed in previous TA projects (INTERACT, Grant Agreement No 730938). The platform was customised especially for AQUARIUS, also based on the proposal submission needs of the Eurofleets projects (e.g. Eurofleets+ Grant Agreement No 824077).

The AQUARIUS portal for the TA call applicants consists of an application form requesting basic project details, the contact information of the user-group and the requested infrastructure and access types to be filled out online by the applicant. Once the application framework conditions have been completed online, a research plan, CV of the user-group leader, an initial data management plan and, if applicable, a letter of recommendation must be uploaded. The application can then be submitted to the TAP.

The detailed documents describing in detail the call and application process and application structure, the "Guidelines for Applicants" (Annex 1), "Research Plan template" (Annex 2), "TAP Online Submission Guidelines" (Annex 3), "CV template" (Annex 4) and "Data Management template" (Annex 5), can be found in Annexes of this deliverable.

## 2.3 Terms and Conditions

The Terms and Conditions for Funding have been adapted for the large number and variety of research infrastructures offered in AQUARIUS. They include information about the eligible costs, non-eligible costs, conditions of Remote Access, conditions concerning access time, liability, signature of agreements, ethics, data management and the encouragement of collaboration and the integration of multiple infrastructures in the application.

The detailed Terms and Conditions are listed in the "Guidelines for Applicants" in Annex 1.

## 2.4 Eligibility Criteria

Special reference should be made to some eligibility criteria in AQUARIUS. AQUARIUS allows applications from all nationalities. However, Access for user groups with a majority of users not working in a EU Member State or Horizon Europe associated country is limited to 20% of the total amount of units of access provided by AQUARIUS. To strengthen international cooperation, proposals for the TA calls must involve at least

three partners from three different countries. In contrast to earlier TA projects such as Eurofleets+, AQUARIUS now pays special attention to ensuring that eligible TA projects contribute to the selected research challenges of the TA calls and to the objectives of the European Mission Ocean 2030. This now forms part of the eligibility criteria.

Detailed Eligibility criteria are listed in the “Guidelines for Applicants” (Annex 1).

## 2.5 Call promotion

The strategy to promote the AQUARIUS calls is described in deliverable [D7.1 Communication and Dissemination Plan](#). Dedicated outreach and engagement campaigns are planned for each call to encourage applications for the TA calls. Among other things, the TA calls will be presented at AQUARIUS brokerage events, there will be webinars on how to apply for the calls and training on how to use the TAP. Webinars will be recorded and made available via the website, and disseminated to target audiences. Information on the AQUARIUS TA calls is also available on the AQUARIUS website, AQUARIUS posters/banners, an AQUARIUS project brochure, newsletter and email campaigns, and dedicated factsheets which will be widely disseminated, both electronically and at relevant events. The TA calls are actively advertised on the AQUARIUS social media channels, e.g. by means of promotional videos and news items, before and during the call opening, and through AQUARIUS and partners’ networks.

Further information can be found in [deliverable D7.1](#).

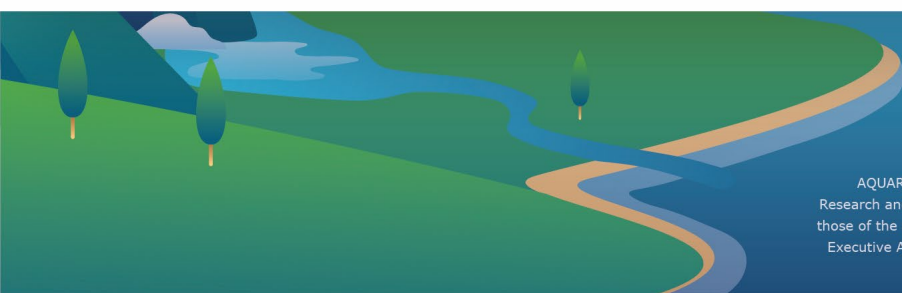
### 3 Annex 1 – AQUARIUS Guidelines for Applicants



# AQUARIUS Guidelines for Transnational Access (TA) Applications

Guidelines for Applicants

18.10.2024/V2.0



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## About this document

Title	Guidelines for Transnational Access Applications
Work Package	WP3 - RI Call Design, Management, Evaluation and Access Platform
Lead Partner	Alfred Wegener Institute
Status Date	18.10.2024
Version	<b>2.0</b>



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# Table of Contents

Table of Contents.....	10
1. Introduction .....	11
1.1. Background.....	11
1.1.1. Access types .....	11
1.1.2. Proposal submission .....	11
1.1.3. Research plan .....	12
1.1.4. Logistical requirements.....	12
1.2. Description of the calls .....	12
1.2.1. Call 1 – Regional Lighthouse Access Call.....	12
1.2.2. Call 2 – Super-integrated Lighthouse Call .....	13
1.3. Call timing .....	14
1.4. Available infrastructures .....	14
2. Eligibility Criteria .....	14
3. Terms and Conditions .....	15
3.1. Terms and Conditions for Funding .....	15
3.1.1. Eligible costs .....	15
3.1.2. Non-eligible costs.....	16
3.1.3. Remote Access .....	16
3.1.4. Further Access Conditions .....	17
3.2. Evaluation and Selection Procedure .....	18
3.3. Reporting.....	19
3.4. Acknowledgements .....	19
3.5. AQUARIUS Data Policy concerning TA .....	19
4. Technical information on infrastructures .....	20
5. Application procedure .....	20
6. Privacy Policy .....	21
7. Contact Information .....	21

## 1. Introduction

### 1.1 Background

On the first of March 2024 the Horizon Europe project AQUARIUS “Aqua Research Infrastructure Services for the health and protection of our unique, oceans, seas and freshwater ecosystems” was launched.

AQUARIUS brings together diverse research infrastructures to address the long-term sustainability of marine and freshwater ecosystems. For the first time, a broad suite of 57 research infrastructure services - including research vessels, mobile marine observation platforms, aircraft, drones, satellite, sensors, fixed freshwater and marine observatories and test sites, experimental facilities, and sophisticated data infrastructures - will be integrated to support researchers and stakeholders in tackling pressing environmental challenges.

Through Transnational Access (TA) funding calls, the project will facilitate access to these research infrastructures, fostering large-scale, multidisciplinary projects aimed at generating impactful results. The focus will be on research that informs evidence-based marine and freshwater policies, with the ultimate goal of protecting ecosystems, reducing pollution, and promoting a sustainable blue economy.

The TA calls will prioritise projects that align with the core objectives of Mission Ocean, ensuring a strong thematic and geographic focus on key regions such as the Baltic, North Sea, Black Sea, Atlantic/Arctic, and Mediterranean, along with their associated river systems.

#### 1.1.1 Access types

Transnational Access (TA) is defined as free of charge, transnational access to research infrastructures or installations for selected user groups. The access includes the logistical, technological and scientific support and the specific training that is usually provided to external researchers using the infrastructure.

Remote Access (RA) is a form of Transnational Access in which the user(s) do not visit the infrastructure or installation physically themselves, instead the staff of the infrastructure or installation conducts the study/collects the samples/does the monitoring for the user(s) according to their research plan.

Virtual Access (VA) means free and open access to stations’ data and databases for everyone, without selection or evaluation processes. Those interested in Virtual Access do not have to apply for Virtual Access as part of a TA call.

#### 1.1.2 Proposal submission

Check carefully if you fulfil the **AQUARIUS Eligibility Criteria (see below)** before submitting your application.

**Proposals must be submitted** using the online [Transnational Access Platform](#) (TAP).

Instructions on how to use the TAP, as well as background documents and **mandatory templates** (except the recommendation letter) are available in the document library of the TAP and at: <https://aquarius-ri.eu/access/>

The following **attachments** must be included with the application:

- Research plan (max. 10 pages),
- Curriculum Vitae of the main applicant (TA user group leader) (max. 2 pages),
- Initial Data Management Plan (DMP). More details can be found [here](#),
- Recommendation letter: Applicants such as PhD students and Master's or Bachelor's students applying to be TA User Group Leaders must include a signed letter of recommendation from their academic supervisor and/or another relevant person.

### 1.1.3 Research plan

The research plan is a mandatory annex to the application. It must follow the structure specified in the instructions for the research plan and can be a maximum **10 pages** in length (excluding the CV, DMP or recommendation letter). Research plans that do not adhere to the specified structure and exceed the length limit will be excluded from the assessment.

### 1.1.4 Logistical requirements

Pay particular attention to information on research permits and special logistical requirements that are necessary for some infrastructures (import and export licences, diplomatic clearance, etc.). Check the [AQUARIUS infrastructure catalogue](#) for availability, area of operation, and requirements of the infrastructures. We recommend contacting the infrastructure operator at an early stage regarding exact availability, technical capabilities, interoperability with other infrastructures, necessary permits, etc.

## 1.2 Description of the calls

### 1.2.1 Call 1 – Regional Lighthouse Access Call

The **Regional Lighthouse Access Call** is looking for applications that address scientific challenges in the EU lighthouse regions. In [deliverable 3.1](#), AQUARIUS has listed the scientific and societal priorities and challenges that are of particular focus in the respective lighthouse regions. Applications are strongly encouraged to focus on the challenges listed in the Lighthouse access call and take place in the relevant lighthouse regions.

Applications that also integrate challenges and regions from another lighthouse region can also qualify.

**Table 1** organises the key research challenges into five main themes for the four lighthouse regions, as defined in AQUARIUS deliverables 3.1 and 3.3. A more detailed overview of the lines of action and the scientific and societal challenges of the AQUARIUS calls can be found in [deliverable 3.3](#).

Region	Marine Resources & Ecosystem Management	Pollution & Biodiversity	Blue Economy	Climate Change	Societal Engagement
<b>Atlantic-Arctic</b>	Sustainable management of marine resources	Monitoring Marine Protected Areas (MPAs), biodiversity changes, and interaction between species	N/A	Climate Change Impact Assessment, understanding vulnerability of local communities	Engaging local communities, combining traditional knowledge and scientific research, ensuring equity
<b>Danube River</b>	Ecosystem restoration (river basin and wetlands/floodplains), innovation transfer for water management	Improving water quality and habitats, understanding pressures on freshwater and marine ecosystems	N/A	Nature-based solutions for extreme phenomena (floods, droughts), cumulative pressure assessment	Public awareness on habitat restoration, aligning with EU and regional policies
<b>Mediterranean Sea</b>	N/A	Enhancing biodiversity monitoring, mitigating marine pollution (oil, hazardous substances)	Sustainable blue economy development (tourism, aquaculture)	Understanding ecosystem resilience to environmental stressors	Public engagement in marine conservation, enhancing regional cooperation
<b>Baltic &amp; North Sea</b>	Restoration of marine habitats, supporting sustainable fisheries and aquaculture	Studying cumulative impacts of pollution (nutrients, chemicals), noise, and other stressors on marine biodiversity	Circular economy, green shipping, multipurpose platforms, blue economy solutions (wind parks, aquaculture)	Managing multi-stressors, exploring CO <sub>2</sub> storage impacts, shifting fuel emissions (e.g., from diesel to LNG)	Optimizing marine space usage (e.g. wind farms, aquaculture), mitigating habitat loss, public engagement in conservation efforts

### 1.2.2 Call 2 – Super-integrated Lighthouse Call

The second AQUARIUS call, the “Super-integrated Lighthouse Call” will be responsive and shaped by the outcomes of the first call. It will focus on new emerging issues, themes not adequately covered in Call 1, or developments within the EU Mission Ocean.

Call 2 is expected to focus more on the key challenges identified for call 1 that affect more than one of the lighthouse regions. This approach will ensure that the Super-integrated Lighthouse Call is even more flexible than Call 1 in terms of cross-cutting topics and regions and can respond to the evolving needs and priorities of the research community and stakeholders.

### 1.3 Call timing

- The first call will open on November 11, 2024, and will remain open for the submission of proposals until January 20, 2025.
- The second call will open on September 2, 2025, and will remain open for two months. The closing date will be October 28, 2025.

The portal for the submission of applications will be closed at 23:59 CEST on the closing date of each of the calls, respectively. Applications received after the closing date and time of the call will not be considered.

### 1.4 Available infrastructures

The infrastructures offered in AQUARIUS are categorised in the following nine categories:

1. Research Vessels
2. Marine Mobile Observation Platforms
3. Fixed Marine Facilities
4. Experimental Research Facilities
5. River & Basin Supersites
6. Aircrafts
7. Drones
8. Satellite Services
9. Data Centers & Virtual Labs

For more information on AQUARIUS TA calls and on the infrastructure capabilities, schedule and geographic areas offered visit the infrastructure catalogue at <https://aquarius-ri.eu/ri-catalogue/>.

The infrastructures available as part of the individual TA calls can be found on the [AQUARIUS website](#) and the TAP.

## 2. Eligibility Criteria

Transnational Access (TA) or Remote Access (RA) will be provided to selected 'user groups'. User groups are teams of one or more researchers (users) led by a 'user group leader', also understood as principal investigator (PI) or chief scientist. A user group eligible for TA must meet the following **strict criteria**:

### 1. Affiliation/Country of work:

- 1.1** The user group leader (PI) and the majority of the users must work in a country other than the country(ies) where the installation is located (unless access is

provided by an international organisation, the Joint Research Centre (JRC), an ERIC or similar legal entity).

**1.2** The user group leader and the designated leader of the team conducting the fieldwork (also understood as chief/co-chief scientist) must be affiliated to the same institution.

- 2. International collaboration:** The proposals for the AQUARIUS TA calls must involve at least three partners from three different countries.
- 3. Dissemination:** Only user groups that are allowed to disseminate the results and knowledge they have generated in the context of the access may benefit from the TA, unless they are working for small- and medium-sized enterprises (SMEs).
- 4. Expertise:** The user group leader (and designated chief scientist, if applicable) must have the appropriate scientific/ technical expertise to conduct proposed work.
- 5. European Mission Ocean 2030 scientific challenges:** User groups must make it clear how the proposed work contributes to selected priorities/challenges of the TA calls and the objectives of the European Mission Ocean 2030 according to AQUARIUS Deliverable 3.1 - AQUARIUS call priority and D6.1 – Data gaps report.
- 6. Access limit:** Access for user groups with a majority of users not working in a EU Member State or Horizon Europe associated country is limited to 20% of the total amount of units of access provided by AQUARIUS. I.e., at least 80% of the total units of access provided by the AQUARIUS project will be granted to parties with the majority of users working in a EU Member State or Horizon Europe associated country.

The non-fulfilment of any of the previous criteria implies the non-acceptance of the application for further evaluation.

## 3. Terms and Conditions

### 3.1 Terms and Conditions for Funding

#### 3.1.1 Eligible costs

1. Funding is provided for accessing the Research Infrastructures owned by the AQUARIUS beneficiaries. For the estimated number of days' access available, please refer to the respective infrastructure profile in the [AQUARIUS RI Catalogue](#). There is flexibility to increase length/days of access if well justified and logistically feasible. Additional days may be funded if logistically and economically feasible and/or can be chartered independently of AQUARIUS funding, if agreed with the infrastructure operator.
2. Access to the AQUARIUS research infrastructures (from 01.03.2024 to 29.02.2028) is free of charge for the selected user groups. It covers the entire use of the infrastructures (in some cases with berth restrictions), including the logistical, technological and scientific support for external researchers using the research infrastructure. Furthermore, it includes costs directly incurred to

implement the project (e.g. consumables, chemicals, shipping of samples, customs of users own equipment), and other standard operating costs.

3. The access time can be granted in a single stage or in several stages, depending on the recommendations of the AQUARIUS Scientific Expert Panel and Operational Expert Panel.
4. Estimated travel and logistics' budget should be described in the TAP and can include costs such as the scientific party's travel and subsistence costs from their home institution to the infrastructure and back, accommodation and meals en-route and possible freight and logistic costs.
5. The amount of the travelling expenses for the user group and the transport of the equipment to the individual infrastructures can be negotiated after the positive scientific evaluation of the proposal.
6. Accommodation and meals may be provided free of charge during the access period (e.g. on board some Research Vessels) but please check with the infrastructure operator in advance. If this is not the case, accommodation and meals onboard can also be requested as part of the travel and subsistence costs applied for.

There is a limited travel and logistics budget available to cover selected users' direct travel and logistics costs incurred while accessing the infrastructures. The amounts vary for each infrastructure so please check the infrastructure profile page for confirmation.

### **3.1.2 Non-eligible costs**

The following costs are not eligible, and are NOT REIMBURSED by the AQUARIUS Transnational Access programme or infrastructure operator. Therefore, do NOT include these in the budget:

1. Additional or third-party costs, such as salary costs or personnel costs of any kind, equipment manufacture, repair and rental of (scientific) equipment, sub-contracting and assistance, vaccination and health care costs, publication costs, overheads and the costs of analysing and evaluating the research samples or results after the TA has been carried out.
2. Insurance costs, or any extra costs of unforeseen circumstances related to travel (e.g. delays or cancellations), bar bills, and other extra services at the place of accommodation. AQUARIUS has no legal responsibility for the health and welfare, including emergency and accident situations, of those who are awarded AQUARIUS Transnational Access.

### **3.1.3 Remote Access**

Include only logistics costs (freight) into the budget, as in remote access the applicants will not be visiting or using the infrastructures themselves and the infrastructure



staff/technicians will do the sampling/monitoring and send the samples/data to the TA users.

### **3.1.4 Further Access Conditions**

#### **1. Access time:**

- a) The maximum duration of access granted to a user group requesting visits to the RI offered in AQUARIUS should be less than three months.
- b) The access time funded by AQUARIUS might be extended providing sufficient complementary funding by the applicant for additional days time. The leveraging of funds from other sources for a portion of the total amount of access-time applied for is encouraged and should be clearly stated in the application. However, cross funding from other EU projects is not permitted. The access or work funded already by another EU project cannot be proposed to AQUARIUS funding.
- c) Allocated RI time includes mobilisation in the place of departure and demobilisation at the end of the project (vessels). Please contact the RI operator for concrete calculations of mobilisation/demobilisation time and estimated passage time (vessels) to the work area and include this time in your research plan/number of days' requested.
- d) AQUARIUS funded access may form part of longer cruises or fieldwork with different working groups included. Applicants should incorporate this possibility as required in their proposals when applying for RI access.
- e) If the number of funded units of access is reduced by the AQUARIUS Consortium for any reason or if the Research Infrastructures are prevented from working (e.g. by poor weather or technical difficulties) no form of compensation shall be payable in respect of any time lost. Please note that the RI schedules are subject to change.

2. **Liability:** RI users should note that installation and operation of any equipment that they bring to the RI is done at their own risk, even when it is carried on board or deployed from a research vessel or other kinds of RIs. Further details will be provided during the negotiation phase.

#### **3. Signature of agreements and affiliation.**

The institution of the user group leader (PI of an application) has the responsibility to sign the access agreement(s).

Applicants (and user-groups) must comply with all affiliation regulations. Any change in the user group composition must be notified to AQUARIUS and will be subject to approval.

The following agreements may be accepted or signed during the negotiation phase:

- a) Acceptance agreement, in which the institution of the user group leader accepts the conditions of the AQUARIUS consortium regarding responsibilities and obligations (e.g. reporting, access conditions, data publication, reimbursement).
  - b) Between the PI of a funded project and the RI operator, if applicable. The beneficiary giving access to its infrastructure may require an additional contract laying out terms and conditions of access, detailing the support granted, reporting, liability, applicable safety/security regulations and modalities of payment of travel and subsistence costs of the scientific party.
4. **Ethics:** Regarding the access to infrastructures and any research funded through AQUARIUS, facilitated or executed therein, the ethical standards and guidelines of Horizon Europe will be rigorously applied, regardless of the country in which the research is carried out.
5. **Encouraging integration.**
- a) Users can select an unlimited number of infrastructures from the nine infrastructure categories offered as part of AQUARIUS. The selection and integration of at least two infrastructures from multiple categories is strongly encouraged.
  - b) Proposals are strongly encouraged to include scientists from less well-equipped countries and an advanced training or educational element for scientists or technicians in their projects.
  - c) Collaboration with researchers from the Ukraine and researchers with refugee status, as well as the inclusion of industry, is encouraged.
6. **Data Management:** Funded TA research projects and user groups will implement data management plans (DMPs) for each TA project, which will be supervised and reviewed by assigned data centres. Researchers from the awarded projects will be educated in open science practices, European marine data infrastructures, and FAIR standards, services and tools to use for processing, documenting, and ingesting their newly collected marine data and resulting data products.

### 3.2 Evaluation and Selection Procedure

The incoming proposals received by the specified submission date will be checked for compliance with the eligibility criteria by the Call Management Office (CMO). Afterwards, the proposal is preliminary reviewed by the Operational Expert Panel (OEP) to check whether the logistical framework for the TA is fulfilled. In the following, the proposals are scientifically evaluated by members of the Scientific Evaluation Panel (SEP) and external, independent scientific experts.

Each application is assessed according to several evaluation criteria: Each criterion is scored from 1-5, where 1=weak, 2=satisfactory, 3=average, 4=good, 5=excellent. The individual assessment criteria are weighted differently, with the scientific and technical quality of the planned research being the most important. The ranking of the

applications is based on the total number of points that the applications have received for the criteria.

After the individual evaluation, the SEP meets for a consensus evaluation and draws up a ranking list of proposals and a shortlist of user groups recommended for funding. After the final recommendation of the Scientific Expert Panel, highly ranked proposals will be examined by the AQUARIUS Operational Expert Panel (OEP) to determine the logistical feasibility of the proposed work. The decisions are finalised by the infrastructure operators, based on the recommendations from the SEP and OEP.

### 3.3 Reporting

Upon completion of a funded transnational access, the user group leader must submit a digital TA project report (in English) via the TAP, within two months of the completion of the access. The TA report is designed to describe the scientific work carried out during the TA, how the work plan was fulfilled, how the results of the TA contribute to the theme and objectives of the call and if there are new discoveries, innovative and industrial potential of the work and results, or applied research investigations.

A **TA report template** will be provided prior to access commencement. The AQUARIUS Scientific Expert Panel may request further information/clarifications (or re-submission of the report) within a reasonable time-frame.

Publications arising in connection with AQUARIUS-funded projects will later be entered in the TAP.

### 3.4 Acknowledgements

All results/publications/presentations/publicity arising from AQUARIUS funded TA should include a reference to the source of funding and the infrastructure used, referring to support given by the European Union's Horizon Europe Framework Programme for Research and Innovation under grant agreement No 101130915.

Accordingly, the END USER must mention the following:

- The research leading to these results was funded by AQUARIUS. AQUARIUS received funding from the European Union's Horizon Europe Framework Programme for Research and Innovation under grant agreement No 101130915; and
- the participation of the INFRASTRUCTURE OPERATOR.

This article applies to all publications containing the results developed, acquired or obtained in the framework of the TA project.

### 3.5 AQUARIUS Data Policy concerning TA

AQUARIUS has adopted an open data policy, which will be implemented with a dedicated Data Management approach, to ensure that all gathered and generated metadata and data will be managed in line with the FAIR principles (Findable, Accessible, Interoperable, Reusable). In order to ensure quality assurance, long-term stewardship and wide access and use of the data collected in the AQUARIUS TA projects, it is

envisaged that the data and metadata, and possible resulting data products, become part of the repositories managed and operated by the leading European data management infrastructures. The AQUARIUS approach is documented in [Deliverable 6.2 – AQUARIUS Data Management Plan](#).

TA applicants must create an initial Data Management Plan following the [AQUARIUS DMP template](#) (available in the TAP document library) and submit it as part of their TA application via the TAP. The initial DMP is not part of the scientific evaluation.

The AQUARIUS Data Management approach is aimed at inclusion and publishing of the data collected/generated during a TA project as open metadata and data in trusted repositories, within the lifetime of the AQUARIUS project. However, temporary embargos (max. 2 years after collection) are possible for specific data that require additional processing and to allow for scientific analyses that will lead to scientific papers.

## 4. Technical information on infrastructures

In preparation of their respective proposal, applicants are advised to consult the AQUARIUS [research infrastructures catalogue](#) on the technical capabilities and interoperability of the infrastructures. Please consider the number of technicians needed to operate specific marine equipment when requesting a certain number of berths in a project.

Please contact the infrastructure operators directly or [aquarius@marine.ie](mailto:aquarius@marine.ie) for more details, if needed.

## 5. Application procedure

Proposal submission involves the steps outlined below. Proposals have to be submitted exclusively via the [AQUARIUS Transnational Access Platform \(TAP\)](#). Please note that a user can **only submit one application per call as user group leader**. However, it is possible for a user group leader to be a member of a user group in other AQUARIUS applications of the same call.

- 1) **Register** on the [AQUARIUS TAP](#) and activate your account.
- 2) **Contact the operators** of the RI to which you are requesting access to find out whether your proposal can be implemented in the RI as planned.
- 3) Fill in the **TA application form** in the TAP. The application consist of two parts.

**A:** General information about the proposal, applicants (user group leader/principal investigator and user group) and technical/logistical information regarding the proposed TA.

**B:** Document/appendices upload to the TAP. The following [documents](#) have to be uploaded as unprotected pdf file.

**A. Research plan.** Applicants should follow the AQUARIUS research plan template, provided in the TAP document library (mandatory).

**B. CV of the user group leader,** using the dedicated CV template in the TAP document library (mandatory).

**C. Preliminary/Initial Data Management Plan**, using the dedicated [DMP template](#) in the TAP document library and specified in [AQUARIUS deliverable 6.2](#) (mandatory).

**D. Optional: Letter of Recommendation** for applicants without a PhD.

- 4) **Review and submit** your application. On the finalisation of the proposal submission the TAP will automatically generate an Application Summary for review before final submission.

The evaluation of proposals will be based upon the information provided in the completed application form, which should be correct, sufficient and adequate for this purpose, taking into consideration the outlined evaluation criteria.

## 6. Privacy Policy

The handling of Personal Data as part of the AQUARIUS Transnational Access application, evaluation and reporting process is in accordance with Data Protection Legislation. Please carefully read the [AQUARIUS Privacy and Cookies Policy](#) for more information on how your Personal Data is handled.

All applicants who wish to query the outcome of their application and/or the processing of their personal data may contact AQUARIUS via the contact email at the [AQUARIUS website](#).

## 7. Contact Information

For general questions regarding AQUARIUS and the RI, please contact: [aquarius@marine.ie](mailto:aquarius@marine.ie).

For questions regarding the AQUARIUS TA calls and the scientific proposal evaluation, please contact: [aquarius.eu@awi.de](mailto:aquarius.eu@awi.de).

For technical questions about the AQUARIUS TAP, contact: [aquarius@inkode.it](mailto:aquarius@inkode.it).

## 4 Annex 2 – AQUARIUS Research Plan Template



[Your project logo/picture, if applicable]

**[Title]**  
**[Acronym]**

AQUARIUS TA Call 1  
Research Plan

[User group leader/applicant(s)]  
[Date]



# Table of Contents

Table of Contents.....	23
Introduction .....	24
Background.....	24
Research plan format .....	24
Scientific project description .....	24
Research Plan template .....	25
1. Information about the applied Transnational Access (TA) project .....	25
2. Scientific background & Motivation .....	25
3. Work Programme.....	25
3.1. Research methods and material .....	25
3.2 Timetable, working area and sampling sites.....	25
3.3 Risk management/Contingency plan .....	26
4. Scientific impact and challenges .....	26
5. User Group .....	27
6. Technical capability and logistic implications .....	28
7. Data exploitation and dissemination .....	28
8. References/Bibliography .....	28
Attachments to TA applications .....	29

## Introduction

### Background

Proposals must be submitted exclusively in electronic form via the [AQUARIUS TA Portal](#). In order to be able to login you have to register to the system. Once registered you are able to proceed with the submission of your application.

This document will guide you to prepare the **SCIENTIFIC RESEARCH PLAN**.

The research plan is a mandatory annex to the application via the AQUARIUS TA Portal. Research plans that do not adhere to the specified structure and exceed the length limit will be excluded from the assessment.

Pay particular attention to information on research permits and special logistical requirements that are necessary for some infrastructures (import and export licences, diplomatic clearance, etc.). Check the [AQUARIUS Infrastructure Catalogue](#) and the responsible infrastructure operator for the necessary permits, if required.

### Research plan format

To guarantee the comparability of applications, the research plan must follow the structure below. Please **use this AQUARIUS word template for your research plan**.

Name the file as follows: **Project acronym\_your surname\_research plan**.

**Document length & format: 10 pages.** A font size of Times New Roman 12 pt or corresponding should be used, max. 3500 characters without spaces per page, including appendices, tables, maps and references. Research plans exceeding 10 pages will not be evaluated.

The plan will be reviewed by international experts and shall include information and structure provided below.

### Scientific project description

The most important parts are the **Scientific Background, Objectives and the Work Programme**. When writing your proposal, please keep in mind that the evaluation of the proposal will be based, in large part, on the information provided in these sections. The proposal should provide a comprehensive and robust justification for the provision of funding, without referring to cited or additional literature. When writing your proposal, you should bear the [AQUARIUS evaluation criteria](#) in mind. The proposal should be as concise as possible to ease the proposal evaluation.



## Research Plan template

### 1 Information about the applied Transnational Access (TA) project

Provide project name, project acronym, name and contact information of the user group leader, duration of the planned access (applied access time, preferred dates of the planned research), requested infrastructures.

### 2 Scientific background & Motivation

- General background
  - Current state of scientific knowledge in the field of research directly linked to the proposed work, including relevant citations and challenges of the proposed work.
  - Your own, previous work in the field and how the research project links to other research by the group leader or research team.
- Relevance of the proposed research, innovative aspects and novelty.
- Research objectives
  - Description of the scientific objectives to be achieved with the proposed project.
  - Clear evidence of expected outputs and deliverables from the proposed work.

### 3 Work Programme

#### 3.1 Research methods and material

- Explain how the research methods will contribute to answering the research questions and objectives, and how they will support the chosen approach.
- Which equipment, which infrastructures are used and integrated for which methods?
- Which research material and data will be collected?
- An outline and timeline of how and when gathered data and samples will be analysed, considering additional funding sources.

#### 3.2 Timetable, working area and sampling sites

- a) **General timetable** and a description of activities in relation to requested access time and for the research per station/sampling site or similar (e.g. station, timing, what is done and by who). See example below, please adopt according to requested infrastructure(s).

Example: Timetable for research cruises:

- a) Include distances to be covered and a calculation of time needed to accomplish them at a given cruise speed as well as station time
- b) Please consider that the passage from the port to the work site is counted as part of the access time. Furthermore, allocated access-time includes mobilisation in the port of departure and demobilisation at the end of the access. Please contact the vessel operator for concrete calculations.

Example for access to research vessels:

Activity	Timing	Geographic coordinates		Depth / Distance	Est. time	Operations (what is done)	Responsible person
		Latitude (N)	Longitude (W)				
<b>Mobilisation</b>						Mobilisation of scientists and equipment onboard, safety briefing	Name, User group leader
<b>Passage from preferred Port of Departure – Station 1</b>		Horta Start: 38.537 End: 37.930	Start: -28.626 End: -15.820	605nm	60	Training, setting up laboratory, underway measurements SST, nutrients	Name, User group leader
<b>Station 1/Task 1</b>		37.930	-15.820	4283m	2.5	CTD cast	Student (NN)
<b>Station 1/Task 2</b>		37.930	-15.820	4283m	3	Multicorer cast	Name, Technician
<b>Transect 1</b>		Start: 37.930 End: 35.770	Start: -15.820 End: -13.180	188nm	30.4	Multichannel seismics line	Name, Early Career Researcher
<b>Etc.</b>							
<b>De-mobilisation</b>						De-mobilisation of users' equipment, samples etc	Name, User group leader

Total units of access:

Total steaming/transit time:

### 3.3 Risk management/Contingency plan

- Critical points, alternative ways to implement the project
- Downtime/bad weather, contingency plan

## 4 Scientific impact and challenges

- Impact

Explain the scientific impact of the project. Are the results expected to raise awareness among potential end-users, the scientific community and the general public?

- **Challenges**  
Clear outline of the specific benefits and impacts related to the call theme and challenges (c.f. AQUARIUS [Deliverable 3.3](#))
- **Collaboration**  
If applicable, please provide information on how your proposed project is embedded into other larger research projects or programs on a national or international level. If applicable, describe how new user groups with limited access to infrastructures will be integrated, or if there is collaboration with industry.

## 5 User Group

Provide information on the number of people in the user group who are directly involved in and joining the TA project on site (user group) and their assigned tasks. Please provide details of their career status, expertise and tasks in the project. It is not necessary to list the expertise of the remote participants, if there are any. Please indicate whether the team members are funded by a source other than AQUARIUS. Provide information on the involvement of Early Career Researchers and how you will support the training of young scientists in the frame of your project.

Match the expertise of your team in relation to the objectives and work to be carried out. **Use the table format as in the example below!**

### Example:

#### On-site participants/user group

No	Name	Gender	County of the workplace	Career status*	On-board tasks, expertise	AQUARIUS-financed (Y/N)
1	Peter Jansen	M	The Netherlands	Senior scientist	<b>User group leader</b> Sedimentologist	
2	NN, Student	F	Finland	Student	CTD work, Nutrient analysis	
Etc.						

#### Remote participants

No	Name	Gender	County of the workplace	Career status*	Tasks	AQUARIUS-financed (Y/N)
1	Laura Sánchez	F	Spain	Early career	Palinology	

2 Folco Rossi M Italy In formation Data processing  
Etc.

---

**\*Senior scientist/Early Career Researcher (ECR)/In formation.** ECR: up to five years active in science from PhD degree; Student: PhD/MSc/BSc student.

## 6 Technical capability and logistic implications

- Provide information on the infrastructures and technical equipment necessary to carry out the proposed work and its availability
- Describe how the requested infrastructures contribute to the fulfilment of the objectives of the research plan. Also describe whether other infrastructures than those offered by AQUARIUS are necessary to fulfil the project objectives.
- If applicable: "own equipment" or complementary funding available to support the proposed work
- Specific logistical needs, including import licenses for equipment, export licenses for samples requests for specific scientific equipment
- Required diplomatic clearances, research permits or information on pending permit applications
- In case of Remote Access: Please include particularly what expertise Remote Access would require from the infrastructure staff, how many measurements/sample collections would be needed, what kind of facilities the infrastructure should have etc.

## 7 Data exploitation and dissemination

- Describe the applicability of the results of the proposed research, and if the publication of results is expected to raise awareness among potential end-users, the scientific community and the general public.
- Describe how you plan to analyse and publish the collected data.
- Describe how the knowledge gained through an AQUARIUS funded project will be disseminated and where gained data will be stored.
- Specify which activities will be undertaken to inform the scientific community and general public about your research activities.

## 8 References/Bibliography

List of references used in the research plan

- end of research plan -

## Attachments to TA applications

Attach the (scientific) research plan and a maximum 2-page CV of the user group leader to your application through the AQUARIUS TA Platform.

An initial Data Management Plan (DMP) must also be uploaded as part of the application. For the CV and the DMP, AQUARIUS templates can be found in the TA Platform document library, which must be used. The CV and DMP will not count against the research plan page limit.

Applicants who apply as user group leaders and do not have a PhD must upload at least one Letter of Recommendation with their application.

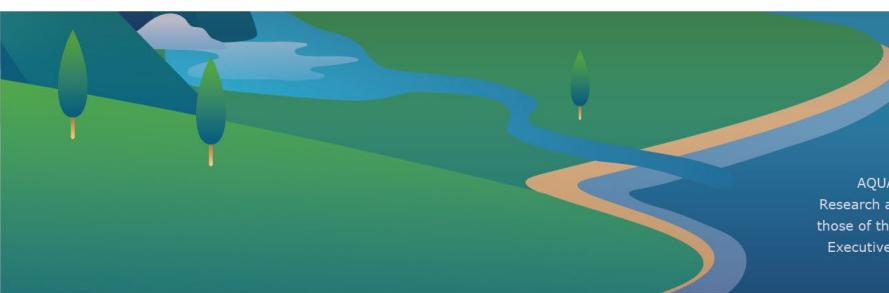
# 5 Annex 3 – AQUARIUS TAP Online Submission Guidelines



## AQUARIUS Transnational Access Platform (TAP)

Online Submission Guidelines

02.10.2024/V1.0



AQUARIUS has received funding from the European Union's Horizon Europe Framework Programme for Research and Innovation under grant agreement No 101130915. Views and opinions expressed are however those of the author(s) only and do not necessarily reflect those of the European Union or European Research Executive Agency. Neither the European Union nor the granting authority can be held responsible for them.

## About this document

Title	AQUARIUS Transnational Access Platform (TAP) – Guidelines for Online Application Submission
Work Package	WP3 - RI Call Design, Management, Evaluation and Access Platform
Lead Partner	Alfred Wegener Institute
Status Date	02.10.2024
Version	<b>1.0</b>



Funded by  
the European Union

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# Table of Contents

Table of Contents.....	32
1. Application steps and form .....	33
2. Transnational Access Platform (TAP) .....	33
2.1. Step 1 - Registration .....	33
2.2. Step 2 – Preparation of the application.....	34
2.2.1. Overview .....	34
2.2.2. Project information.....	34
2.2.3. User Group .....	35
2.2.4. Logistic information.....	36
2.2.5. Travel and logistic costs.....	37
2.2.6. Publications.....	38
2.2.7. Appendices .....	39
2.3. Step 3 - Submission .....	39
3. Contact details .....	39



## 1. Application steps and form

The following pages offer a step-by-step guideline for the online submission process. You can use them as a checklist to make sure you have all the information needed in order to fill in the form. The different screenshots displayed in this document will guide you through the submission process.

Proposals must be submitted exclusively in electronic form via the **AQUARIUS Transnational Access Platform (TAP)**.

The proposal submission involves the following steps:

- 5) **Step 1:** Registration on the [TAP](#) and confirmation of e-mail address.
- 6) **Step 2:** Complete the TA application form in the TAP with all relevant information. This step consists of two main parts:
  - A. Application information to be inserted in TAP forms:** General information about the proposal, applicants (user group leader and user group) and logistic/technical information regarding the intended access.
  - B. Appendices to the application:**
    - 1) **Research plan.** Applicants should follow the AQUARIUS research plan template, provided in the TAP document library (mandatory).
    - 2) **CV of the user group leader**, using the dedicated CV template in the TAP document library (mandatory).
    - 3) **Preliminary/Initial Data Management Plan**, using the dedicated DMP template in the TAP document library and specified in [AQUARIUS deliverable 6.2](#) (mandatory).
    - 4) Optional: **Letter of Recommendation** for applicants without a PhD.

These documents must be uploaded at the end of the online application process as separate, unprotected PDF files.

- 7) **Step 3:** Review the application and submit it.

## 2 Transnational Access Platform (TAP)

### 2.1 Step 1 - Registration

In order to be able to use the AQUARIUS [Transnational Access Platform \(TAP\)](#), you have to create an user account by inserting your registration details and confirm your e-mail address.

You can request a new password at any time if you have lost it.

When you have confirmed your e-mail address, you receive immediate access to the TAP login page.

On the TAP landing page, you will find the open TA call for which you can apply.

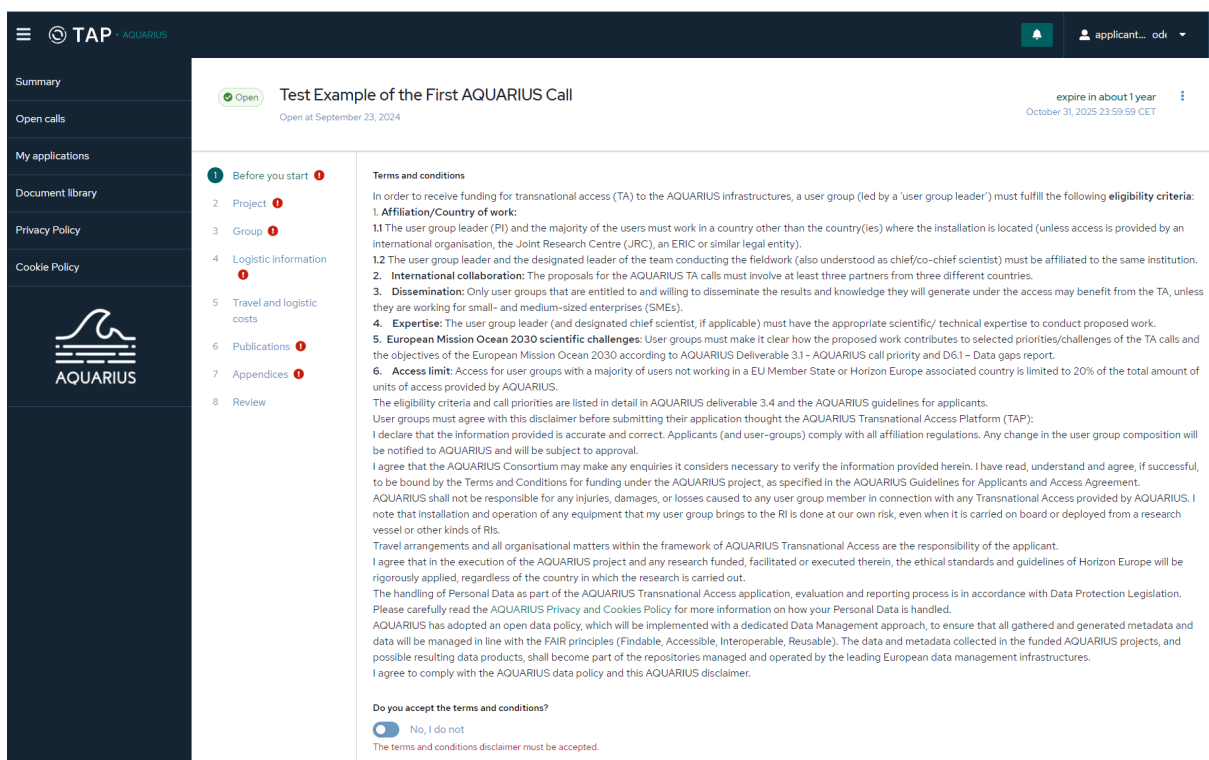
## 2.2 Step 2 – Preparation of the application

### 2.2.1 Overview

On the left side of the TAP you can see the TAP menu with the open TA calls, your application, the document library where you can find all guidelines and templates for the application, as well as the AQUARIUS Privacy and Cookie Policy.

As soon as you start the application process, the call menu will guide you through the various steps of the application.

Before you can start the application, you must agree to the Terms and Conditions of AQUARIUS.



You must complete the various forms for the application one after the other. After completing each form, you must save the content so that you can open the completed form again later. You can then go back to the individual forms of the application process at any time.

The individual forms and data entered can be changed and adapted at any time until you finally submit the proposal.

Fields marked with a red asterisk are mandatory.

### 2.2.2 Project information

In the **Project** form, you must include information on the project, a summary/abstract and scientific discipline and keywords. The keywords will be used to find scientific

reviewers for your application later. Therefore, please enter the 5 most suitable keywords.

Open Test Example of the First AQUARIUS Call expire in about 1 year  
October 31, 2025 23:59:59 CET

Open at September 23, 2024

---

- 1 Before you start
- 2 Project !
- 3 Group !
- 4 Logistic information !
- 5 Travel and logistic costs
- 6 Publications !
- 7 Appendices !
- 8 Review

**Acronym \***

The acronym is required. !

**Title \***

The title is required. !

**Project summary \***

Project summary may be used and shared publicly

The description is required. !

**Scientific discipline \***

Choose from the list

The scientific discipline is required.

**Topic keywords \***

Please, select no more than 5 keywords according to the most relevant subjects of your research. The chosen keywords will be used to find the reviewers and evaluators.

Choose from the list

The activity keywords list is required.

**Have you previously received EU Transnational Access funding?**

If yes, please specify by providing the project name, acronym, where, when, and by which EU project (e.g. EUROFLEETS, INTERACT, JERICO, ARICE, etc.)

### 2.2.3 User Group

Now enter all participants who are requesting access in your application. Only those who are listed here will be eligible for financial compensation. Please indicate who will be the user group Leader and who is an Early Career Researcher.

You can add new user group members by clicking on **+ Add new member** at the bottom of the page.

Please note: In order to fulfil the eligibility criteria of the AQUARIUS TA call, the user group must consist of at least three applicants (1 user group leader/PI and 2 user group members) who are all based in different countries.

**Member 1**

**1. Group Leader**  
 This person will be the TA User Group leader for the project's implementation at any kind of research infrastructure where access is applied. The TA User Group leader will be the main point of contact of the group, also in terms of signing agreements, submitting project reports, reporting publications, etc.

False  
 One member should be leader

**1. Early career researcher**  
 False

**1. Name \***  
  
 The name is required.

**1. Surname \***  
  
 The surname is required.

**1. Email \***  
  
 The email is required.

**1. Gender \***  
 Choose from the list  
 The gender is required.

**1. Year of birth \***  
  
 The year of birth is required.

**1. Researcher status \***  
 Choose from the list  
 The researcher status is required.

**1. Field of research \***  
 Choose from the list  
 The field of research is required.

**1. Nationality \***  
 Choose from the list  
 The nationality is required.

**1. Country of residence \***  
 Choose from the list  
 The country of residence is required.

**1. City of residence \***  
  
 The city of residence is required.

**1. Organization name \***  
  
 The organization name is required.

**1. Organization type \***  
 Choose from the list  
 The organization type is required.

**1. Organization country \***  
 Choose from the list  
 The organization country is required.

**1. Organization city \***  
  
 The organization city is required.

[+ Add new member](#)

## 2.2.4 Logistic information

To include infrastructures in your application, click on **+Choose first research infrastructure**.

After you have selected an RI, click on **+Add first access** for this RI.

You must now specify whether you require physical or remote access for this RI, depending on what the RI offers, the requested access period and the number of units of access.

Now also specify which of your user group members would like to have access to the requested RI. This only applies for physical access.

**For each additional member of your user group** who would like to have access to the requested RI, you must click on **+Add new access**.

- 1 Before you start
- 2 Project
- 3 Group
- 4
- 5 Travel and logistic costs
- 6 Publications
- 7 Appendices
- 8 Review

1
Research Infrastructure 1 3
Empty + Add

**1. Research infrastructure \***

Choose from the list

The research infrastructure is required.

**1. Research infrastructure second option, if first not available**

Choose from the list

The second infrastructure must be different from the first selected.

2
Accesses 1 1
Empty + Add

The accesses section is required.

+ Add first access

+ Choose new research infrastructure

Do you need research infrastructure training (e.g. on safety regulations, permits, licenses, etc.). If yes, please specify

Do you need data management training (e.g. on data standards, metadata standards, etc.). If yes, please specify

Are you willing to offer spare berths or places in your project for the training programme? If so, how many?

**Transnational access justification \***

Brief scientific justification why you and your team are not carrying out your project on a national infrastructure in your own country or elsewhere (e.g. national infrastructures location in a foreign country)

To apply for multiple RIs, click on **+Choose new research infrastructure**.

Now you have to specify the access for each user group member who wants to have access to this additional RI, by clicking on **+Add new access**.

You can repeat this for any number of RIs.

At the end, each member of the user group should have access to each of the RIs requested for them.

### 2.2.5 Travel and logistic costs

Now enter the planned travel route for the requested RI for each user group member individually. Under **+Add first/new cost for physical access** you can enter the costs you want to request for each user. You can select cost categories from the drop-down menu or enter manually requested cost categories. Several cost categories can be requested for each user.

- 1 Before you start
- 2 Project
- 3 Group
- 4 Logistic information
- 5 Travel and logistic costs
- 6 Publications !
- 7 Appendices !
- 8 Review

physical access - Test Name Surname

📍 RV Belgica from February 03, 2025 to March 14, 2025

Describe the travel route for the member from the point of departure to the RI and back. \*

Test city 1 - port of departure

1 Costs Empty + Add

**1. Item \*** -

Select from the list or, if not already available, enter the item you wish to add (e.g. 'Hotel', 'Car hire', etc.). Information on eligible costs can be found in the AQUARIUS Guidelines for Applicants ⋮

Travel cost x ▾

**1. Cost \***

1,000.00 €

**1. Notes**

+ Add new cost for physical access at RV Belgica

physical access - test2 test

📍 RV Belgica from February 03, 2025 to March 14, 2025

Describe the travel route for the member from the point of departure to the RI and back. \*

Test city 1 - port of departure

0 Costs Empty + Add

+ Add first cost for physical access at RV Belgica

## 2.2.6 Publications

In this form, it is important to indicate how your proposed work **contributes** to at least one of the given **priorities and challenges of the TA call** and the objectives of the European Mission Ocean 2030.

This is an important eligibility and evaluation criterion.

Indicate here if you already have publications planned, as well as the 5 most relevant publications of the user group for the application.

## 2.2.7 Appendices

Open Test Example of the First AQUARIUS Call  
Open at September 23, 2024

- Before you start
- Project
- Group
- Logistic information
- Travel and logistic costs
- Publications
- Appendices** !
- Review

**Research plan**

+

The research plan is required.

---

**Group Leader CV**

+

The group leader cv is required.

---

**Recommendation letter**

+

---

**Data management plan**

+

You must now upload the attachments for the application. The documents must be prepared in accordance with the Guidelines for Applicants and the AQUARIUS templates.

All guidelines and templates can be found in the TAP Document Library.

Important note: You can upload a modified version of your attachments at any time until the call deadline. However, no changes are possible after you have submitted your final proposal as described in the next step.

## 2.3 Step 3 - Submission

After preparing your application, you can now view a preview of the data you have entered and the documents you have uploaded.

**Change information:** Before finalising the submission, all data in all forms as well as the appendices can be changed. Simply go to the relevant page and enter your changes. When the page is saved, the information on the final review page will also change.

**Important note:** If you click on the "Submit" button, your submission is finalised and you can no longer make any changes.

After the final submission of the proposal, the user group leader will receive an automatically generated e-mail confirming the successful submission.






Additional information: The same user can only submit **one proposal**.

## 3 Contact details

For questions regarding the AQUARIUS TA application procedure and call documentation, please contact: [aquarius.eu@awi.de](mailto:aquarius.eu@awi.de).

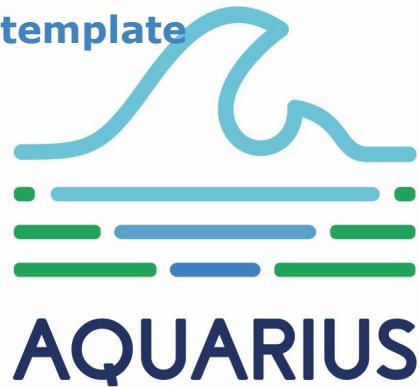
For technical questions about the AQUARIUS TAP, contact: [aquarius@inkode.it](mailto:aquarius@inkode.it).

## 6 Annex 4 – CV template

PERSONAL INFORMATION	<p>Replace with Title, First name(s) Surname(s)</p> <p> Replace with affiliation (Institution name, house number, street name, city, postcode, country)</p> <p> Replace with telephone number     Replace with mobile number</p> <p> <u>State e-mail address</u></p> <p> <u>State personal/institutional website(s)</u></p> <p>Gender Enter gender   Date of birth dd/mm/yyyy   Nationality Enter nationality/-ies</p>
CURRENT POSITION	Replace with current position / personal statement
ROLE IN THE AQUARIUS TA PROJECT	Specify your role in the AQUARIUS TA project
CAREER STAGE	Replace with Category A/B/C/D <sup>1</sup> (delete footer in the end)
YEARS ACTIVE IN SCIENCE SINCE OBTAINING PHD	Number
WORK & SCIENTIFIC EXPERIENCE	
	[Add separate entries for each experience. Start from the most recent.]
Replace with dates (from - to)	<p>Replace with occupation or position held</p> <p>Replace with employer’s name and locality (if relevant, website)</p> <ul style="list-style-type: none"> <li>▪ Replace with main activities, responsibilities and <b>research topics</b></li> </ul>
SCIENTIFIC EDUCATION AND TRAINING	
	[Add separate entries for each career step. Start from the most recent.]
Replace with dates (from - to)	<p>Replace with degree/qualification awarded</p> <p style="text-align: right; color: blue;">Replace with EQF (or other) level if relevant</p> <p>Replace with education or training organisation’s name and locality (if relevant, country)</p> <ul style="list-style-type: none"> <li>▪ Replace with a short list of principal subjects covered or skills acquired</li> </ul>
EXPERIENCE AS USER GROUP LEADER	<p>Name your 5 most important experiences as a group leader of scientific fieldwork or a research cruise</p> <p>[Remove any headings left empty.]</p>
FIELD WORK EXPERIENCE	<p>Replace with your fieldwork or sea-going experience. Specify in what context they were acquired.</p> <p>Example: Co-chief scientists in 5 cruises in the Baltic Sea. Work with moorings and acoustic current profilers...</p>
PROJECT-RELATED SKILLS	<p>Replace with any project-related skills not listed elsewhere. Specify in what context they were acquired.</p>
ADDITIONAL INFORMATION	
Publications (max. 5) Projects Courses Certifications	<p>Replace with maximum five relevant publications, relevant projects, trainings or certificates relevant to the project. Remove headings not relevant in the left column.</p>



## 7 Annex 5 – DMP template



# **AQUARIUS initial Data Management Plan template for TA Call applications**

September 2024



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## AQUARIUS initial Data Management Plan template for TA Call applications

As part of the Transnational Access (TA) projects in AQUARIUS, many new data sets in a large variety of data types will be collected by the TA scientific teams, making use and combining multiple and different observation installations as provided. There will be a strong effort in AQUARIUS to get the maximum return of investment from the TA activities towards serving the EU Mission and AQUARIUS Partnership targets and associated initiatives and projects with new data, data products, and scientific knowledge. Therefore, AQUARIUS has adopted an **open data policy**, which will be implemented with a **dedicated Data Management approach**, to ensure that all gathered and generated metadata and data will be managed in line with the FAIR principles (Findable, Accessible, Interoperable, Reusable). The metadata and data should become part of the archives managed and operated by leading European data management infrastructures for quality assurance, long term stewardship, and wide access and use.

**TA scientific teams are advised to take note of the AQUARIUS Data Management approach document and guideline which can be found at:**

**<https://zenodo.org/records/13642869>**

The AQUARIUS data management flow scheme includes a number of steps from planning to training to deployment to publishing, and a number of instruments, which should be applied in those steps by the TA scientific teams.

An initial step is that TA Call applicants are requested to complete an **initial Data Management Plan** for their proposed project, following the **AQUARIUS DMP template phase 1**, and to submit this as part of their TA Call application

Once the TA proposal has been awarded, the TA project team will be requested to review and refine the DMP once the TA team has a better understanding of the TA project that will be deployed and the AQUARIUS data management approach. AQUARIUS expert data centres can assist with the Call process and respond to questions about the AQUARIUS data management approach, for as far as answers cannot be found in the AQUARIUS Data Management approach document. In the phase after the TA project awarding there will be a kick-off meeting for selected TA projects with the AQUARIUS expert data centres to give support for completing and refining the TA project DMP template.

The questions in the DMP template are derived from the Horizon Europe DMP template and adapted for use as part of the AQUARIUS data management approach.

## **AQUARIUS initial Data Management Template - to be completed and submitted as part of the TA Call application**

### **1. Data Summary**

What is the purpose of the data collection/generation and its relation to the objectives of the project?

What types and formats of data will the project generate/collect?

How is the original data gathered on the TA installation(s) and how do you plan to transfer it to you?

What processing on the raw data do you plan? Please differentiate between data quality assurance (handling of outliers, missing and suspect values, null observations) and data harmonisation (code, label and QC flag explanations, consistent use of headers and units, data formatting, conforming to standards).

When do you plan to perform these processing steps by means of a concise planning?

### **2. Making data FAIR**

#### **2.1 Making data findable, including provisions for metadata**

The **AQUARIUS Data Management approach** is aimed at inclusion of your collected/generated data in leading European aquatic data management infrastructures such as **SeaDataNet**<sup>1</sup> (physics, chemistry, geophysics, geology, and biology), **EurOBIS**<sup>2</sup> (marine biodiversity), **ELIXIR-ENA**<sup>3</sup> (biogenomics), **ICOS-Ocean**<sup>4</sup> (carbon), and **Copernicus INSTAC**<sup>5</sup> (Near- Real-Time data). Inclusion will be mediated through expert data centres which are partners in the AQUARIUS project. They will give training and education to the TA teams about planned data management practices as part of AQUARIUS WP5. In addition, as part of AQUARIUS WP6, they will give support to the TA teams for the adoption of the preferred metadata and data standards, and ingestion of the resulting metadata and data in repositories that are nodes of the indicated European data management infrastructures. This way, the metadata and data from the TA projects will become FAIR and also available for EMODnet, Copernicus Marine, DTO developments, EOSC, and global data exchanges such as GEOSS and the digital ocean ecosystem which is being developed in the framework of the UN-IOC-Ocean Decade programme. In the AQUARIUS Data Management approach, it is recommended to make use of the online **Data Submission service of EMODnet Data Ingestion**<sup>6</sup> and/or **SeaDataNet SeaNoe service**<sup>7</sup> for transfer of your metadata and data packages to the AQUARIUS expert data centres.

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<sup>1</sup><https://www.seadatanet.org>

<sup>2</sup><https://www.eurobis.org>

<sup>3</sup><https://www.ebi.ac.uk/ena/>

<sup>4</sup><https://www.icos-cp.eu/observations/ocean/otc>

<sup>5</sup><https://marine.copernicus.eu/about/producers/insitu-tac>

<sup>6</sup><https://www.emodnet-ingestion.eu>

<sup>7</sup><https://www.seadatanet.org/Software/SEANOE>

Paragraph 5.4 of the **AQUARIUS Data Management approach** document lists the minimum set of metadata that EMODnet Ingestion requests you to enter in order to document your data packages submission. In addition, Annex 1 of the document gives a list of items that should be documented during the TA data acquisition and processing activities as these are later needed, when transforming data to the standard metadata and data formats as required.

Will you in principle be able to follow the **AQUARIUS Data Management approach** for metadata? What possible challenges do you foresee?

How will you document all this information before submission, especially lineage information (i.e. processing and QC steps)?

## 2.2. Making data openly accessible

The AQUARIUS project follows an **open data access policy**. Therefore, the **AQUARIUS Data Management approach** is aimed at inclusion and publishing of your collected/generated data as open metadata and data in trusted repositories, within the lifetime of the AQUARIUS project. However, temporary embargos (max 2 years after collection) are possible for specific data that require additional processing and to allow for scientific analyses that will lead to scientific papers.

Will you collect/generate data that might require a temporary embargo? Indicate which type of data and motivate its temporary embargo for each case.

Do you also plan to make the data and metadata available on another repository next to the AQUARIUS repositories, for instance an institutional, national or general data repository?

## 2.3. Making data interoperable

The **AQUARIUS Data Management approach** is aimed at making the collected/generated data interoperable by adopting common standards from leading European data management infrastructures. Use will be made of standard formats, QA-QC procedures, and controlled vocabularies for many metadata tags. For this process the TA teams will be given support by the AQUARIUS expert data centres, who also can help with use of common tools and services. To be able to do these transformations from original metadata and data to standardised metadata and data, it is important that relevant information about the data collection/generation is noted down during the actual events.

This consists of the **AQUARIUS TA Data Summary Log** which should be maintained by the PI of the TA project scientific team to keep an overview and index of the data collection events. It should be shared afterwards with the AQUARIUS data centre experts as it will provide an index to the collected/generated data and relevant documentation, such as who, when, where, how, etc. It contains only metadata and no data. For keeping this log, the PIs of the TA projects will receive a tablet from WP6 with a preloaded app, that will facilitate entering, browsing, and exporting information. The tablet should be returned to the WP6 team after finalisation of the TA acquisition activities. The **AQUARIUS TA Data Summary Log** will serve as a list for the expert data centres to know what data to expect from where and who and as a checklist for the following steps in the data management workflow.

In addition to the TA Data Summary Log it is recommended that the researchers of the TA teams document several aspects of the data acquisition and following processing, so that the later transformation to the common standards of the European marine data management infrastructures will be easier. Annex 1 of the AQUARIUS Data Management approach document gives a checklist which documentation TA researchers are recommended to maintain for this purpose.

Will you in principle be able to organise your TA team during the TA activities in order to gather the input required for the **AQUARIUS TA Data Summary Log**? What possible challenges do you foresee?

#### **2.4. Increase data re-use (through clarifying licences)**

The AQUARIUS project follows an **open data access policy**, and the AQUARIUS Data Management approach is aimed at inclusion and publishing of your collected/generated data as open metadata and data in trusted repositories, within the lifetime of the AQUARIUS project. The preferred licence for use of AQUARIUS data is CC-BY-4.0.

Do you foresee any difficulty for your collected/generated data to follow this policy?

#### **3. Other research outputs**

Do you plan to generate other research outputs next to the collected/generated data such as digital (e.g. software, workflows, protocols, models, etc.) or physical (e.g. new materials, antibodies, reagents, samples, etc.) results?

#### **4. Allocation of resources**

Terms & Conditions of AQUARIUS Funding require TA teams to follow the AQUARIUS Data Management Approach. This includes efforts for:

- updating their initial **Data Management Plan (DMP)** per TA project, as included in their original proposal submission, after being awarded and getting ready for the actual TA project deployment
- taking part in WP5 data management training activities to learn about AQUARIUS data management standards and getting experience with tools and services
- using the app during TA activities to complete the **AQUARIUS TA Data Summary Log**
- completing a **Cruise Summary Report (CSR)**<sup>8</sup> in case the TA project will involve scientific cruises with Research Vessels
- transforming the original metadata and data to the AQUARIUS prescribed standards, performing QA-QC, and making these FAIR and ready for inclusion in AQUARIUS repositories, thereby supported by AQUARIUS expert data centres.

#### **5. Data security**

The operators of the repositories as used for the AQUARIUS archival and long-term stewardship have security provisions in use such as for backups, secure storage, firewalls, etc.

What provisions are in place by the TA teams for data security (including backups, secure storage and transfer) in the initial phase, before the data is transferred to the AQUARIUS expert data centres?

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<sup>8</sup><https://www.seadatanet.org/Metadata/CSR-Cruises>

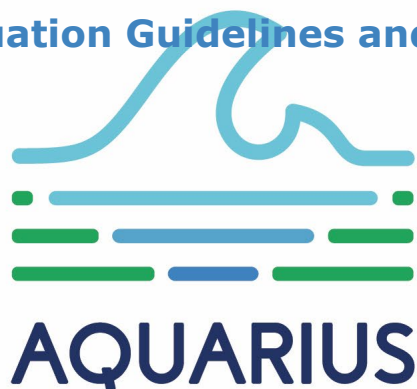
## **6. Ethical aspects**

Are there, or could there be, any ethics or legal issues that can have an impact on data sharing?

## **7. Other issues**

Will you follow any other national/ sectoral/ departmental procedures for data management, on top of the infrastructure and procedures that AQUARIUS will provide as part of its data management approach?

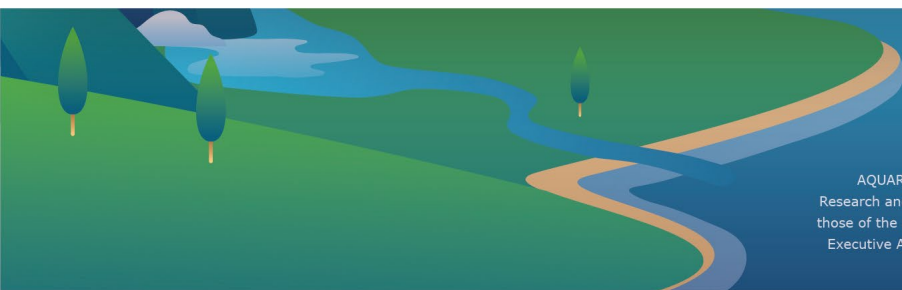
## 8 Annex 6 – Evaluation Guidelines and Criteria



# AQUARIUS Transnational Access Calls

Evaluation Guidelines & Criteria

19.09.2024/V1.0



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## About this document

Title	Evaluation guidelines and evaluation criteria for AQUARIUS Transnational Access call applications
Work Package	WP3, RI Call Design, Management, Evaluation and Access Platform
Lead Partner	Alfred Wegener Institute
Status Date	19.09.2025
Version	<b>1.0</b>



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# Table of Contents

Table of Contents.....	49
1. Introduction .....	50
2. The AQUARIUS Evaluation System.....	50
3. Evaluation of the TA applications.....	50
3.1. The AQUARIUS Scientific Expert Panel (SEP).....	50
3.2. The Evaluation Workflow.....	51
3.2.1. Eligibility check.....	51
3.2.2. Logistic pre-check .....	51
3.2.3. Scientific evaluation .....	51
3.2.4. Logistic evaluation .....	52
3.2.5. Negotiation .....	52
3.2.6. Evaluation publicity .....	52
4. Evaluation criteria .....	53
5. Selection priorities .....	54

## 1. Introduction

On the first of March 2024 the Horizon Europe project AQUARIUS “Aqua Research Infrastructure Services for the health and protection of our unique, oceans, seas and freshwater ecosystems” was launched.

AQUARIUS will provide a highly comprehensive suite of integrated research infrastructures appropriate to addressing significant challenges for the long-term sustainability of our unique oceans, seas and freshwater ecosystems. AQUARIUS will support the development phase of the EU Mission to Restore our Ocean and waters by 2030, the Sustainable Blue Economy Partnership, the European Green Deal, and international climate initiatives.

Through funding Transnational Access (TA) projects and allowing access to the RI, it is anticipated that large scale and significant research and innovation projects can be supported. The needs of researchers will be met through a robust and transparent system of Transnational Access (TA) funding calls, facilitated by a newly customised and user-friendly access portal.

Access will be granted based on scientific excellence. Thus, the individual assessment of proposals by experts in the respective field of research forms an integrative and essential part of the access modalities. We are well aware of the crucial role of the evaluators, the time and effort associated with this task, and hence we highly appreciate their valuable contribution.

## 2. The AQUARIUS Evaluation System

The AQUARIUS proposal evaluation system is based on evaluation structures, procedures and best practices from previous Transnational Access (TA) projects (e.g. EUROFLEETS 1, 2 & Plus; ARICE; INTERACCESS; JERICO and ASSEMBLE Plus).

**Excellence-driven Access:** The evaluation system of AQUARIUS, in which only scientifically excellent-ranked proposals are considered for the logistical evaluation, ensures that only excellent proposals are considered for funding.

## 3. Evaluation of the TA applications

### 3.1 The AQUARIUS Scientific Expert Panel (SEP)

Evaluations are overseen by the AQUARIUS Scientific Expert Panel (SEP) and based on open, transparent, merit-based, impartial, and fair evaluation and selection procedures, strictly following the principles of equal opportunity. The AQUARIUS Scientific Expert Panel (SEP) consists of international experts in the field, at least half of them independent from the consortium.

The membership of the AQUARIUS SEP is personal and public. For more details concerning the panel’s members please consult <https://aquarius-ri.eu/>.

The members of the SEP play a central role in the evaluation of submitted TA proposals to ensure a standardised and transparent evaluation process. The role of the SEP is to assist the AQUARIUS Call Management Office in the TA evaluation process, finding

external reviewers for the TA proposals and providing constructive feedback to applicants.

## 3.2 The Evaluation Workflow

### 3.2.1 Eligibility check

The TA applications received by the specified submission date undergo a first check by the Call Management Office to ensure that all eligibility criteria and call requirements are met. The requirements include:

- a. Are the application documents complete?
- b. Is the proposal complying with the eligibility criteria? (Full eligibility criteria are available here: [AQUARIUS Deliverable 3.4: Call Documentation for AQUARIUS Transnational Access Calls](#))
- c. Are all sections of the application form completed correctly and the requested research plan structure (scientific project description) followed?
- d. Is there a reasonable explanation of how the project contributes to the AQUARIUS call requirements and challenges (c.f. [AQUARIUS Deliverable 3.3: Design and Definition of Transnational Access Calls](#))?

Proposals considered to be ineligible will be returned to the applicant with a note explaining why they were considered to be not eligible.

### 3.2.2 Logistic pre-check

Preliminary review of the TA applications by the Operational Expert Panel (OEP) to check whether the logistical framework for the TA is fulfilled (e.g. availability of infrastructure for the requested period, requested costs, requested places for participants).

### 3.2.3 Scientific evaluation

The proposals are scientifically evaluated by external, independent scientific experts, and SEP members when appropriate.

- a. **Selection of reviewers**  
Eligible applications are allocated to SEP members with the respective expertise. The SEP members assist the AQUARIUS Call Management Office in finding external reviewers for the TA proposals. The names of the experts assigned to individual proposals are not made public. Evaluators are required to declare NO conflict of interest and must agree to the AQUARIUS confidentiality clause before reviewing their assigned AQUARIUS TA proposals.
- b. **Individual assessment**  
Eligible applications are evaluated by at least two external evaluators, and a member of the SEP, if required. Evaluators are chosen in mutual agreement by the SEP and the Call Management Office.

The experts assess the application(s) assigned to them and score and comment on each of the **Evaluation Criteria** (see paragraph 4 below) using dedicated **Assessment Form**, which is embedded in the AQUARIUS TA Platform.

In the assessment form in the TA Platform, the assessors should award marks on a rating scale for each assessment criterion (see paragraph 4 below).

The individual assessment criteria are weighted differently (paragraph 4). The ranking of the applications in the consensus assessment is based on the total number of points that the applications have received for the criteria.

c. **Consensus Evaluation**

After the individual evaluation, the SEP meets in person or online for a consensus evaluation and draws up a **ranking list of proposals and a shortlist of user groups recommended for funding**. Evaluators justify their marks with constructive comments. The SEP will agree on an overall Consensus Feedback: All applicants, whether successful or unsuccessful, will be given feedback on the outcome of the evaluation.

The proposals recommended for implementation are then ranked according to their total score and recommended for implementation or rejection.

### **3.2.4 Logistic evaluation**

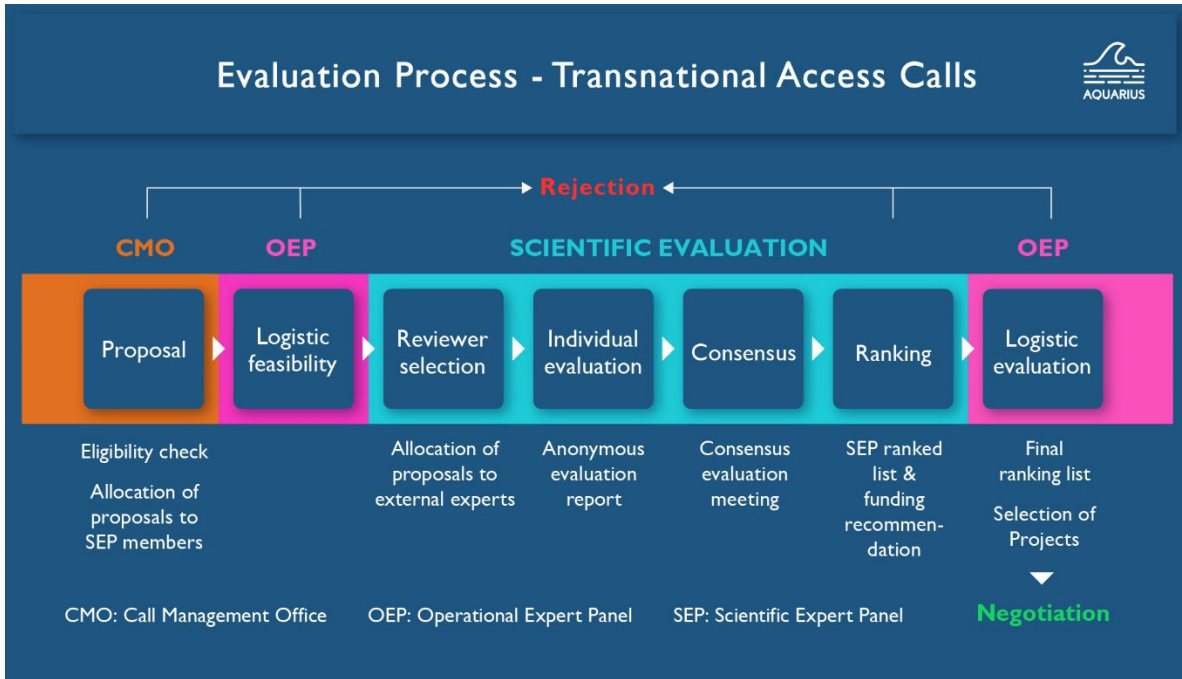
After the final recommendation by the SEP, high ranked proposals will be examined by the AQUARIUS Operational Expert Panel (OEP) to determine the logistical feasibility of the proposed work. The OEP will aim at optimising the use of infrastructure time and associated costs. The decisions are finalised by the Research Infrastructure managers, based on the recommendations from the SEP and OEP.

### **3.2.5 Negotiation**

Successful applicants may be asked to make changes to their proposals during the funding negotiation phase to accommodate the comments of the evaluators and/or the comments of the AQUARIUS SEP or OEP, e.g. on possible integration of other infrastructures or with other projects or cruises. Successful applicants will be invited to enter into negotiation to conclude a contract between the AQUARIUS consortium and the user group leader.

### **3.2.6 Evaluation publicity**

All applicants whether successful or not will be contacted after the final decision of the SEP and OEP. Information about the funded projects will be available on the AQUARIUS website. The timeline for the evaluation until the announcement of the results of the evaluation process are listed in the AQUARIUS TA Platform.



**Figure 1:** Work flow and different steps involved in the AQUARIUS evaluation procedure.

## 4. Evaluation criteria

Access to any infrastructure in AQUARIUS will be regulated according to the excellence-driven access mode<sup>9</sup>. This mode of access is dependent on the scientific excellence, originality, quality and technical and ethical feasibility of an application evaluated by international experts. In this way, AQUARIUS ensures that only scientifically excellent proposals are considered for funding.

<sup>9</sup> European Charter for Access to Research Infrastructures, doi:10.2777/524573

Eligible proposals will be evaluated using the following criteria.

<b>Criteria</b>	<b>Weighting</b>
<b>1) Scientific quality of the planned research</b> <ul style="list-style-type: none"> <li>Is the general scientific background well described and challenges clearly identified?</li> <li>Is the proposed topic of high scientific relevance, is it innovative?</li> <li>Are the research objectives clearly stated?</li> </ul>	30%
<b>2) Quality of the work plan</b> <ul style="list-style-type: none"> <li>Is the work plan clearly described and are the scheduled tasks and methods adequate to the set objectives?</li> <li>Is the work plan feasible considering resources and time?</li> <li>Are potential risks and contingency plans well addressed?</li> </ul>	20%
<b>3) Scientific impact and challenges</b> <ul style="list-style-type: none"> <li>Is the expected scientific impact well addressed?</li> <li>Is the proposed research/topic contribute to addressing at least one of the requested call themes and challenges (AQUARIUS <a href="#">Deliverable 3.3</a> and <a href="#">website</a>)?</li> <li>Is the proposed project embedded into larger research programmes on a national, EU or international level? Is international collaboration envisaged?</li> </ul>	10%
<b>4) Composition and scientific competence of the user-group leader and user-group</b> <ul style="list-style-type: none"> <li>Is the background/track record of the user group leader related to his/her career stage sound enough?</li> <li>Are the roles and responsibilities of the user team clearly stated?</li> <li>Do early career researchers have a clearly identified role and is there appropriate training for early career researchers?</li> <li>Does the user group contain diversity in nationalities, gender and in different stages of their scientific careers?</li> </ul>	15%
<b>5) Technical capability</b> <ul style="list-style-type: none"> <li>Is all necessary equipment requested and available to carry out the proposed project?</li> <li>Are logistical needs and research permits clearly identified?</li> <li>Is an appropriate number of relevant infrastructures meaningfully integrated into the proposal?</li> </ul>	10%
<b>6) Data exploitation and dissemination</b> <ul style="list-style-type: none"> <li>Is a clear plan presented how the gathered data will be managed, analysed and published?</li> <li>Does the data management comply to open science practices?</li> <li>Are the proposed dissemination and outreach activities during and after the campaign adequate?</li> </ul>	15%

All evaluation criteria receive a score of 1-5 each.

Applicants have to ensure that sufficient information is provided in the proposal to enable a thorough evaluation of all criteria.

## 5. Selection priorities

The selection of user groups is based on scientific excellence. The SEP will apply the principles of transparency, fairness and impartiality.

Collaborative applications from teams and institutions where no equivalent research infrastructure exist, collaboration with vulnerable groups such as researchers from Ukraine and researchers with refugee status, and the inclusion of female, young and early career scientists, as well as a strong training aspect in the project are strongly encouraged. International and/or industrial partners are welcome.

Priority should be given to user groups composed of users who:

- have not previously used the installation and
- are working in countries where no equivalent research infrastructure exist.