

Sir Roger Penrose Institute
for Interdisciplinary Sciences

Regulations of the Programme for the Support of Independent Systemic Analysis

under the Institute's Fund for Research
and Systemic Analysis Support

Document defining the rules for natural persons applying
for support for access to publications, volumes, monographs, licences
and individual access packages to the Report K* series.

The Programme for the Support of Independent Systemic Analysis
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1. General Provisions

1. These Regulations define the rules of operation of the Programme for the Support of Independent Systemic Analysis, conducted by the Sir Roger Penrose Institute for Interdisciplinary Sciences.
2. The Programme is intended for natural persons conducting scientific, research, analytical, educational, expert, journalistic, civic or other activity consistent with the statutory objectives of the Institute.
3. The Programme is intended to partially finance access to publications, reports, monographs and individual access packages to the Report K* series for persons who may use these materials in scientific, educational, analytical, civic, authorial or expert work.
4. The Programme is not a commercial promotion, sales discount or automatic price reduction. It is a form of targeted, non-refundable support for access to knowledge, granted as part of the scientific, educational and social activity of the Institute.
5. The Programme is financed from the resources of the Institute's Fund for Research and Systemic Analysis Support.
6. The rules for establishing, financing, accounting for and allocating the resources of the Fund are set out in a separate document: Regulations of the Institute's Fund for Research and Systemic Analysis Support.
7. The Programme may also be financed from the resources of the Guarantee Reserve for Support Programmes, if the Management Board of the Institute makes such a decision.
8. The granting of support depends on an individual assessment of the application, fulfilment of formal requirements, the consistency of the application with the objectives of the Programme and the availability of resources allocated to a given call.
9. The establishment of the Programme does not create, on the part of any person, any claim to receive support.

2. Definitions

For the purposes of these Regulations, the following terms shall have the meanings set out below:

1. **Institute** – the Sir Roger Penrose Institute for Interdisciplinary Sciences.
2. **Programme** – the Programme for the Support of Independent Systemic Analysis.
3. **Fund** – the Institute's Fund for Research and Systemic Analysis Support.
4. **Reserve** – the Guarantee Reserve for Support Programmes.
5. **Applicant** – a natural person applying for support under the Programme.
6. **Support** – non-refundable, targeted co-financing intended for access to a publication, volume, monograph, licence or individual access package to the Report K* series.

7. **Institute Publications** – volumes of the Report K* series, special volumes, analytical monographs, methodological notes, reports and other materials published or made available by the Institute.
8. **Individual Access Package** – a package covering access to selected publications of the Report K* series by one natural person, within a specified settlement period and in accordance with the rules of an individual licence.
9. **Individual licence** – a licence enabling one natural person to use a publication, without the right to make the publication available to other persons, teams, institutions or organisations.
10. **Call** – the monthly application period for support specified in these Regulations.

3. Purpose of the Programme

1. The purpose of the Programme is to support natural persons who may use the Institute's publications in scientific, research, analytical, educational, expert, civic, authorial or journalistic activity.
2. The Programme is intended to enable broader access to in-depth systemic analyses for persons who do not have sufficient institutional financing, but whose work may contribute to the development of knowledge, education, public debate, independent analysis or research on complex systems.
3. The Programme serves in particular to support persons who may use publications of the Report K* series as research, educational, analytical, source or expert material.
4. The Programme is not intended to finance commercial activity, resale of publications, further distribution of content or the creation of materials using the Institute's publications without respecting copyright and licensing rules.
5. The Programme does not constitute a form of remuneration, scholarship, social assistance benefit or monetary benefit for the Applicant.

4. Persons Eligible to Apply for Support

1. Support under the Programme may be applied for in particular by:
 - a) independent researchers,
 - b) doctoral candidates,
 - c) students carrying out scientific or educational projects,
 - d) authors of scientific, popular science, analytical or expert publications,
 - e) specialist publicists,
 - f) journalists dealing with strategic, technological, social, political, international or scientific topics,
 - g) independent analysts,

- h) educators,
 - i) persons conducting civic or social projects,
 - j) persons preparing lectures, classes, publications, analyses, reports, educational materials or research projects related to the subject matter of the Report K* series.
2. The Institute may also admit another natural person to participate in the Programme if it considers that the person's activity or planned manner of using the publication is consistent with the objectives of the Programme.
 3. The mere fulfilment of formal criteria does not automatically mean that support will be granted.
 4. One natural person may receive support under the Programme no more than once in a calendar year.
 5. A person who has received support under another programme financed from the Fund in a given calendar year may not be admitted to receive support again in the same year, unless the Management Board of the Institute decides otherwise.
 6. The rule limiting support to one person in a given calendar year is intended to ensure the broadest possible distribution of the Fund's resources among different persons and communities.

5. Subject of Support

1. Support may concern:
 - a) the purchase of a single volume of the Report K* series,
 - b) the purchase of a special volume of the Report K* series,
 - c) the purchase of an analytical monograph published by the Institute,
 - d) the purchase of an individual annual access package to the Report K* series,
 - e) obtaining an individual access licence to the Institute's publications,
 - f) access to other publications of the Institute, if they are covered by the Programme.
2. Support does not automatically cover dedicated reports, analyses prepared on individual request, consultations, workshops or expert services.
3. Support may be used only for the purpose indicated in the decision granting it.
4. Granted support may not be paid in cash, transferred by bank transfer to the Applicant or converted into another purpose.
5. Granted support may not be used for other services, publications, materials, consultations, activities or benefits of the Institute, even if they fall within the scope of the Institute's paid activity, unless the Institute expressly decides otherwise in the decision granting support.

6. Nature of Support

1. Support granted under the Programme is non-refundable, provided that it is used in accordance with the decision of the Institute, these Regulations and the licensing rules applicable to the publications covered by the support.
2. Support is not paid to the Applicant in monetary form and may not be converted into cash, a bank transfer, another service, another publication or any purpose other than that indicated in the decision granting support.
3. Granted support may be used only within the time limit and for the purpose indicated in the decision of the Institute.
4. Support not used within 30 days from the date on which the Institute sends the e-mail containing the decision granting support expires, and the resources corresponding to the unused support return to the Fund or the Reserve.
5. In the event that support is used contrary to the Regulations, the decision of the Institute or the licensing rules, the Institute may withdraw the support, refuse to grant support in the future and pursue protection of its rights in accordance with applicable law.

7. Amount of Support

1. The standard level of support under the Programme may amount to up to 30% of the price of a publication, licence or individual access package.
2. In particularly justified cases, the Institute may grant extended support of up to 50% of the price.
3. Extended support may be granted in particular to:
 - a) doctoral candidates,
 - b) young researchers,
 - c) persons without institutional support,
 - d) persons carrying out non-commercial educational projects,
 - e) persons conducting unpaid social, civic or popularisation activity,
 - f) persons who demonstrate limited capacity to cover the full price of access.
4. In the case of persons using the Institute's publications in commercial, media, advisory, training, political or expert activity, the level of support may be limited.
5. The Institute may refuse to grant support or grant support in an amount lower than requested if it considers that the Applicant has sufficient capacity to cover the price of the publication, licence or access package independently.
6. The Institute may refuse to grant support without the obligation to provide detailed justification, in particular in the absence of resources allocated to a given call, lack of

consistency of the application with the objectives of the Programme or failure to meet formal requirements.

7. The amount of support is determined each time on the basis of an individual assessment of the application, the availability of resources in a given call and the nature of the planned use of the publication.
8. The maximum amount of one-off support for one natural person is PLN 1 500, unless the Management Board of the Institute determines a different maximum amount for a given call.

8. Prohibition of Double Financing and Financing from Other Sources

1. The Applicant is obliged to indicate in the application whether he or she is applying, has applied or has received financing for the same publication, licence or access package from another grant, subsidy, scholarship, institutional or support programme.
2. If the Applicant is applying, has applied or has received other financing, he or she should indicate:
 - a) the name of the financing institution,
 - b) the name of the programme,
 - c) the amount of financing requested or granted,
 - d) the status of the application, in particular: submitted, under assessment, granted, refused or settled.
3. The total value of support granted by the Institute and financing obtained from other sources may not exceed 100% of the price of the publication, licence or access package to which the application relates.
4. In the case of active VAT taxpayers entitled to deduct VAT, the limit referred to in paragraph 3 applies to the net price.
5. The Institute may limit the amount of support if the information presented in the application indicates that the Applicant has received or may receive financing from other sources.
6. Concealment of information on financing from other sources may result in refusal to grant support, withdrawal of support already granted or refusal to participate in subsequent calls.

9. Application Submission and Assessment Deadlines

1. Applications under the Programme are accepted from the 1st to the 5th day of each month, provided that the Institute announces a call in that month.

2. The date of submission of the application shall be the date on which the complete, signed application is received at the e-mail address indicated by the Institute.
3. Applications submitted after the deadline indicated in paragraph 1 shall not be considered.
4. Applications submitted after the deadline do not automatically transfer to the next monthly call.
5. An Applicant whose application was submitted after the deadline may submit a new application in the next call period, provided that he or she meets the conditions for participation in the Programme.
6. The results of the call are announced by the 25th day of the month in which the call was conducted.
7. If the 5th or 25th day of the month falls on a statutory holiday, Saturday or Sunday, the Institute may consider that the relevant deadline expires on the next following business day.
8. The Institute may refrain from announcing a call in a given month if the resources allocated to the Programme are insufficient to grant support or if organisational, financial or statutory reasons justify this.

10. Pool of Resources in a Given Call

1. The Institute may announce a monthly pool of resources allocated to support under a given call.
2. The monthly pool may result from the quarterly settlement of the Fund, resources transferred from previous calls, resources derived from targeted fundraising campaigns, donations, subsidies, the Reserve or other sources indicated in the Regulations of the Fund.
3. Support may be granted only up to the amount of resources available in a given pool.
4. If the available pool of resources is insufficient to consider applications in a given month in a manner consistent with the objectives of the Programme, the Institute may:
 - a) refrain from announcing a call in that month,
 - b) limit the number of support decisions granted,
 - c) grant support in an amount lower than requested,
 - d) transfer the consideration of applications to the last month of the given quarter.
5. The transfer of the consideration of applications to the last month of the quarter does not change the rules concerning application submission deadlines.
6. Applications submitted outside the call period shall not be considered even if the consideration of other applications is transferred to a later date.

11. Language of the Application and Attachments

1. Applications under the Programme are accepted only in Polish or English.
2. Applications submitted in any other language shall be left without consideration.
3. All attachments to the application should be submitted in Polish or English.
4. If the original attachment was drawn up in a language other than Polish or English, the Applicant is obliged to attach:
 - a) a copy of the original document,
 - b) a translation of the document into Polish or English.
5. The translation referred to in paragraph 4(b) does not have to be a certified translation, unless the Institute expressly decides otherwise in the conditions of a given call.
6. An application containing attachments drawn up in a language other than Polish or English, without an attached translation into one of these languages, shall be left without consideration.
7. The Institute does not request the Applicant to supplement translations, missing attachments or other formal deficiencies, unless it expressly decides otherwise in the conditions of a given call.
8. The formal and substantive assessment of the application is carried out on the basis of documents submitted within the call period.
9. Submission of an incomplete application, an unsigned application, an application submitted after the deadline, an application submitted in a language other than Polish or English, or an application containing untranslated attachments shall result in the application being left without consideration.

12. Method of Submitting the Application

1. In order to apply for support, the Applicant submits the application form made available by the Institute.
2. The application should contain at least:
 - a) the Applicant's first name and surname,
 - b) contact details,
 - c) a brief description of the Applicant's activity,
 - d) indication of the publication, licence or access package to which the application relates,
 - e) indication of the expected level of support,
 - f) description of the planned use of the publication,
 - g) justification of the need for support,

- h) information on possible institutional financing or lack thereof,
 - i) declaration of compliance with licensing rules,
 - j) declaration of the truthfulness of the data contained in the application,
 - k) consent to the publication of information on granted support if the application is approved,
 - l) declaration of acceptance of these Regulations.
3. The application should be sent to the e-mail address indicated by the Institute.
 4. The application should be signed by the Applicant and then sent as a scan of the signed document or as a document signed with a qualified electronic signature, trusted signature or another form of electronic signature accepted by the Institute.
 5. The subject line of the message should read:

Application for support – Report K*
 6. The Institute assesses only complete applications, signed, submitted on time and drawn up in Polish or English. Applications that do not meet formal requirements shall be left without consideration.
 7. The date of submission of the application shall be the date on which the complete, signed application is received at the e-mail address indicated by the Institute.

13. Application Assessment Criteria

1. When assessing the application, the Institute takes into account in particular:
 - a) the consistency of the Applicant's activity with the scientific, educational, research, analytical or social objectives of the Institute,
 - b) the nature of the Applicant's activity,
 - c) the planned manner of using the publication,
 - d) the potential significance of the publication for the Applicant's research, education, public debate, analytical activity or civic activity,
 - e) lack of or limited access to institutional financing,
 - f) the financial capacity of the Applicant,
 - g) the non-commercial or social nature of the planned use of the publication,
 - h) declaration of compliance with licensing rules,
 - i) previous cooperation with the Institute, if any,
 - j) the availability of resources in the given call pool.
2. The Institute may also take into account other circumstances if they are relevant to assessing whether support should be granted.

3. Applications are not assessed solely in the order of receipt. The Institute may give priority to applications that best fulfil the objectives of the Programme.
4. The Institute may limit the amount of support if it considers that the Applicant intends to use the publication primarily in commercial, media, advisory, training, political or expert activity conducted for remuneration.
5. The Institute may refuse support if the planned use of the publication could lead to a breach of copyright, licensing rules, the independence of the Institute or the good name of the Institute.

14. Decision to Grant Support

1. If support is granted, the Institute informs the Applicant by e-mail about:
 - a) the subject of support,
 - b) the amount of support granted,
 - c) the amount remaining to be paid,
 - d) the deadline for using the support,
 - e) the method of making the purchase or obtaining the licence,
 - f) the applicable rules for using the publication.
2. Granted support may be used only for the purpose indicated in the decision of the Institute.
3. Support not used within 30 days from the date on which the Institute sends the e-mail containing the decision granting support expires.
4. The resources corresponding to unused support return to the Fund or the Reserve and may be allocated to support another application submitted by another participant of the Programme.
5. The granting of support does not constitute an indefinite reservation of resources.
6. The Institute may withdraw granted support if it appears that the support was granted on the basis of false, incomplete or misleading information.
7. Support may not be transferred to another person without the prior consent of the Institute.

15. Announcement of Results and Publication of Information on Granted Support

1. The results of the call are published on the Institute's website.
2. Publication of results includes information on applications for which support has been granted.
3. In the case of natural persons, the published information may include:

- a) first name and surname of the person to whom support has been granted,
 - b) project title, purpose of support or title of the publication to which the support relates,
 - c) name of the support programme,
 - d) percentage or amount of support granted.
4. By submitting the application, the Applicant acknowledges that the transparency of results is one of the conditions of participation in the Programme.
 5. The application form contains consent to the publication of the data indicated in this section.
 6. Lack of consent to the publication of data required for the announcement of results shall result in the application being left without consideration.
 7. The Institute does not publish applications, justifications, contact details, addresses, identification numbers, financial information or any other data not listed in this section.
 8. Information on refusal to grant support does not have to be published, unless the Institute decides otherwise in a given call.

16. Nature of Decisions and No Appeal Procedure

1. Decisions of the Institute concerning the granting of support, refusal to grant support, amount of support, leaving an application without consideration or transferring the consideration of applications to a later date are discretionary.
2. No appeal is available against decisions of the Institute.
3. The Applicant may submit another application only in the following calendar year, unless the Institute expressly allows another possibility in the regulations of a given call.
4. An application submitted after the deadline, in a language other than Polish or English, unsigned, incomplete or submitted by an unauthorised person may be left without consideration.

17. Rules for Using Publications Covered by Support

1. Publications purchased with the use of support are subject to the same copyright protection and licensing rules as publications purchased at full price.
2. The granting of support does not mean the transfer of copyright, consent to further distribution of the publication or extension of the licence beyond the scope specified by the Institute.
3. In the case of an individual licence, the publication may be used only by the Applicant to whom support has been granted.

4. An individual licence does not include the right to make the publication available to other persons, teams, institutions, organisations, editorial offices, law firms, companies or third parties.
5. Multi-user, library, academic, departmental or institutional access requires a separate licence.
6. In particular, it is prohibited to:
 - a) send PDF files to unauthorised persons,
 - b) copy publications beyond the scope permitted by the licence,
 - c) place publications in open repositories,
 - d) place publications on an intranet without an appropriate licence,
 - e) make publications available as part of a shared team resource without an institutional licence,
 - f) resell publications,
 - g) distribute publications in whole or in substantial part without the consent of the Institute,
 - h) use publications as shared material for a team, editorial office, company or organisation without an appropriate licence.
7. Quoting fragments of publications is permitted in accordance with applicable law and provided that the source is clearly indicated, including at least the title of the publication, the author's first name and surname, the name of the Institute and the name of the Report K* series.

18. Marking of Digital Copies

1. The Institute reserves the right to use individual markings of digital copies, including markings identifying the purchaser, order number, type of licence or scope of access.
2. Markings may be visible or technical in nature and may be used to protect copyrights, prevent unauthorised distribution of publications and identify the source of a possible licence breach.
3. Removing, modifying or circumventing the markings of a digital copy is prohibited.
4. The detailed method of marking digital copies may depend on technical solutions used by the Institute.

19. Applicant's Liability

1. The Applicant is responsible for the truthfulness of the information provided in the application.

2. The Applicant undertakes to use the publication in accordance with the licence granted and the rules specified by the Institute.
3. In the event of a breach of licensing rules, the Institute may:
 - a) withdraw the support granted,
 - b) refuse to grant support in the future,
 - c) restrict access to subsequent publications,
 - d) pursue protection of its rights in accordance with applicable law.
4. The Applicant is liable for unauthorised disclosure of the publication to third parties or use of the publication outside the scope of the licence.

20. Personal Data and Contact

1. Data provided in the application are processed for the purpose of considering the application, implementing the Programme, contacting the Applicant, documenting the support granted and publishing call results within the scope specified in these Regulations.
2. The data controller is the Sir Roger Penrose Institute for Interdisciplinary Sciences.
3. Data are processed to the extent necessary to implement the Programme.
4. Detailed information concerning the processing of personal data may be specified in a separate privacy policy of the Institute or in an information clause made available together with the application form.
5. The Applicant is obliged to provide true and current data.

21. Amendments to the Regulations

1. The Institute may amend these Regulations, in particular in the event of changes to the rules of operation of the Programme, changes to the scope of publications covered by support, changes to the method of financing the Programme or the need to clarify procedures.
2. The amended Regulations shall apply from the date of their publication on the Institute's website, unless the Institute specifies a later effective date.
3. An amendment to the Regulations does not affect support already granted, unless the amendment results from applicable law, a breach of the Programme rules by the Applicant or the need to protect the Institute's copyrights.

22. Final Provisions

1. The Programme is conducted as part of the Institute's activity and may be suspended, limited or terminated at any time, in particular if the resources allocated to the Programme are exhausted.

2. The Institute may specify additional conditions of a given call, provided that they are not contrary to these Regulations.
3. In matters not regulated by these Regulations, decisions are made by the Institute.
4. These Regulations enter into force on the date of publication on the Institute's website.