

Sir Roger Penrose Institute
for Interdisciplinary Sciences

Terms of the Premium / Strategic Package for publications of the Report K* series

a document defining the scope of access
to regular volumes, special volumes,
digital publications, printed publications
and additional materials of the Institute

This document defines the terms of the Premium / Strategic Package
as an extended access package to the Report K* series
and other publications of the Institute. The Premium / Strategic Package
does not constitute a standalone user licence, but defines
the scope of publications and services covered by access.
The rules for using publications are defined by the applicable licence,
in particular the Corporate / Strategic Licence,
unless the offer provides otherwise.

These terms constitute an implementing document
to the Corporate / Strategic Licence approved
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Contents

1	General provisions	2
2	Definitions	2
3	Nature of the Premium / Strategic Package	3
4	Basic scope of the package	4
5	Regular volumes	5
6	Special volumes	5
7	Digital format and printed format	6
8	Language versions	7
9	Additional materials	7
10	Preferential access to additional publications	8
11	Access period	8
12	Change of publication schedule	9
13	Exclusions from the package	9
14	Relationship to user licences	10
15	Price and nature of the service	11
16	Breach of package terms	11
17	Amendment of package terms	12
18	Final provisions	13

1. General provisions

1. This document defines the terms of the Premium / Strategic Package for publications of the Report K* series and other publications made available by the Sir Roger Penrose Institute for Interdisciplinary Sciences.
2. The Premium / Strategic Package is an extended access package to the Institute's publications, intended for individuals, institutions, organisations, business entities, academic units, analytical teams, public administration, strategy departments, risk departments, funds, think-tanks and other recipients requiring broad access to regular volumes and special volumes of the Report K* series.
3. The Premium / Strategic Package is not a standalone user licence. This means that the purchase of the package itself defines the scope of publications covered by access, whereas the manner in which those publications may be used is defined by the applicable licence indicated in the offer, order, licence document or individual agreement.
4. Unless the offer provides otherwise, the Premium / Strategic Package is linked to the Corporate / Strategic Licence.
5. If the Premium / Strategic Package is purchased by one natural person, a team, institution, library, university or organisation, the Institute may indicate another applicable user licence if the manner of using the publications corresponds to the scope of the Individual, Expert, Institutional Single-Copy, Team / Departmental, Library or Academic / Teaching Licence.
6. Purchasing the Premium / Strategic Package, accepting an offer or commencing use of publications covered by the package constitutes acceptance of these terms and of the applicable user licence.
7. The Premium / Strategic Package does not transfer to the package purchaser any economic copyrights to publications or any intellectual property rights to the methodology, analytical structure, models, concepts, forecasts, charts, tables, diagrams, studies or other elements of publications protected by law.

2. Definitions

For the purposes of this document, the following terms shall have the meanings set out below:

1. **Institute** – the Sir Roger Penrose Institute for Interdisciplinary Sciences.
2. **Premium / Strategic Package** – an extended access package to the Institute's publications, including regular volumes, selected special volumes and other elements indicated in the offer description.
3. **Package purchaser** – a natural person, institution, organisation, enterprise, public unit, university, library, fund, think-tank or other entity that has purchased the Premium / Strategic Package.
4. **Publication** – any volume, report, monograph, analysis, methodological note, digital

file, printed edition, additional material or other work made available by the Institute, in particular within the Report K* series.

5. **Report K*** – a series of specialised analytical publications of the Institute devoted to systemic analysis of technology, civilisation, social, economic, political, scientific and strategic processes, and complex transformational phenomena.
6. **Regular volume** – a recurring volume of the Report K* series, covering a specific area of systemic analysis and published in accordance with the Institute’s publishing rhythm.
7. **Special volume** – a publication of the Report K* series devoted to a particular problem, event, systemic threshold, strategic situation or topic requiring separate analysis.
8. **Access period** – the period during which the Package purchaser is entitled to receive publications covered by the Premium / Strategic Package, in accordance with the offer description.
9. **Publications covered by the package** – publications indicated in the description of the Premium / Strategic Package, in particular regular regular volumes, special volumes or additional materials.
10. **Applicable user licence** – the licence defining the manner of using publications covered by the Premium / Strategic Package, in particular the Corporate / Strategic Licence or another licence indicated by the Institute.
11. **Preferential access** – the possibility to purchase additional publications, in particular special volumes not included in the scope of the package, on terms more favourable than standard terms, if provided for in the offer description or by an individual decision of the Institute.
12. **Digital format** – a publication made available in electronic form, in particular as a PDF file or through the Institute’s digital reading room.
13. **Printed format** – a physical copy of a publication made available in printed form.
14. **Language version** – the Polish, English or another language version of a publication, if prepared and published by the Institute.

3. Nature of the Premium / Strategic Package

1. The Premium / Strategic Package defines the scope of access to the Institute’s publications and not a standalone scope of user rights.
2. This means that the Premium / Strategic Package answers the question of which publications the Package purchaser obtains access to, whereas the applicable user licence answers the question of how, by whom and within what scope those publications may be used.
3. The Premium / Strategic Package may be made available in particular as:
 - a) an annual package,
 - b) a half-year package,

- c) a package covering a specified number of regular volumes,
 - d) a package covering regular volumes and selected special volumes,
 - e) a package individually structured for the Package purchaser,
 - f) a package linked to the Corporate / Strategic Licence,
 - g) a package linked to another licence indicated by the Institute.
4. If the offer description provides for a specified access period, the Premium / Strategic Package covers only publications included within the scope of the package and published or made available by the Institute during that period.
 5. The Premium / Strategic Package does not automatically include all future publications of the Institute, dedicated reports, analyses prepared on request, consultations, workshops, expert presentations, confidential materials or documents prepared individually, unless the offer description or an individual agreement expressly provides otherwise.

4. Basic scope of the package

1. The scope of the Premium / Strategic Package is defined by the offer description, order, licence document or individual agreement.
2. Unless the offer description provides otherwise, the Premium / Strategic Package may include:
 - a) regular volumes of the Report K* series published during the access period,
 - b) up to 3 special volumes of the Report K* series published during the access period,
 - c) preferential access to additional special volumes if, during a given period, the Institute publishes more than 3 special volumes,
 - d) digital publications within the scope indicated in the offer,
 - e) printed publications within the scope indicated in the offer,
 - f) Polish and English language versions of publications, if they have been prepared and included in the offer,
 - g) additional materials, if expressly indicated in the offer description.
3. The Premium / Strategic Package may include both digital and printed formats if the offer description so provides.
4. If the offer description does not expressly indicate that the package includes both formats, it is assumed that the format scope follows from the specific variant of the package purchased.
5. If the offer description provides access to the Polish and English versions, the Package purchaser receives access to both language versions of the publications covered by the package, provided that both versions have actually been prepared and published by the Institute.

6. If a given publication has been prepared only in one language version, the Premium / Strategic Package includes only the version actually published, unless the Institute decides otherwise.

5. Regular volumes

1. The Premium / Strategic Package may include regular volumes of the Report K* series published during the access period.
2. If the offer description provides for an annual package, the package may include up to 6 regular volumes of the Report K* series, provided that such number of volumes is actually published during the access period.
3. If the offer description provides for a half-year package, the package may include up to 3 regular volumes of the Report K* series, provided that such number of volumes is actually published during the access period.
4. If the offer description provides for a package covering another number of regular volumes, that number follows from the offer description, order or individual agreement.
5. The Institute reserves the right to change the publication rhythm of regular volumes for substantive, organisational, editorial, technical or other justified reasons.
6. If, during the access period, the Institute publishes fewer regular volumes than the maximum limit specified in the package description, the Package purchaser receives access to the regular volumes actually published during that period, without any claim for the publication of additional volumes, refund of part of the price or automatic extension of the package, unless an individual offer or agreement provides otherwise.
7. If, during the access period, the Institute publishes more regular volumes than the number covered by the package, the scope of access to additional regular volumes depends on the offer description or an individual decision of the Institute.

6. Special volumes

1. The Premium / Strategic Package may include selected special volumes of the Report K* series published during the access period.
2. Unless the offer description provides otherwise, the Premium / Strategic Package may include a maximum of up to 3 special volumes published by the Institute during the access period.
3. The limit of 3 special volumes means the maximum number of special volumes covered by the package and not an obligation of the Institute to publish exactly 3 special volumes in a given period.
4. If, during the access period, the Institute publishes fewer than 3 special volumes, the Package purchaser receives access to the special volumes actually published during that period, without any claim for the publication of additional volumes, refund of part of the

price or automatic extension of the package, unless the offer description or an individual agreement provides otherwise.

5. If, during the access period, the Institute publishes more than 3 special volumes, the Package purchaser receives access to 3 special volumes covered by the package, and may purchase the remaining special volumes on preferential terms if this is provided for in the offer description or by an individual decision of the Institute.
6. The Institute may indicate which special volumes are covered by the Premium / Strategic Package if, for substantive, strategic, publishing or licensing reasons, not all special volumes may be included in the package.
7. Special volumes prepared as dedicated reports, reports on request, confidential studies, individual analyses or publications with a special status are not automatically included in the scope of the Premium / Strategic Package.

7. Digital format and printed format

1. The Premium / Strategic Package may include publications in digital format, printed format or both formats, in accordance with the offer description.
2. If the offer description provides that the Premium / Strategic Package includes both formats, the Package purchaser receives access to the digital version and a printed copy of the publications covered by the package, provided that the given format has actually been prepared by the Institute.
3. The digital version and the printed version contain the same substantive content, unless the Institute expressly marks a given version as extended, abridged, working, repository or special.
4. The form in which a publication is made available does not change the substantive value of the content or the scope of legal protection of the publication.
5. In the case of digital publications, the Institute may apply individual copy markings, watermarks, metadata, order numbers, licence data, user markings or other technical safeguards.
6. In the case of printed publications, the Institute may apply copy markings, numbering, licence markings or other identifying information.
7. Shipping costs for printed copies are included in the package price only if the offer description so provides.
8. International shipping, courier shipping, special shipping or re-shipping of publications may require an additional fee if this follows from the offer description or individual arrangements.

8. Language versions

1. The Premium / Strategic Package may include Polish, English or other language versions of publications, if they have been indicated in the offer description.
2. If the offer description provides that the package includes the Polish and English versions, the Package purchaser receives access to both language versions of the publications covered by the package, provided that both versions have actually been published.
3. If a translation of a publication is published later than the original version, access to the translation may be granted after its completion, in accordance with the scope of the package.
4. The Institute is not obliged to prepare a translation of every publication, unless an individual offer or agreement expressly provides otherwise.
5. The absence of a translation of a publication in a given period does not constitute grounds for requesting a refund of part of the package price, unless the offer description or an individual agreement provides otherwise.

9. Additional materials

1. The Premium / Strategic Package may include additional materials, if they have been expressly indicated in the offer description.
2. Additional materials may include in particular:
 - a) methodological notes,
 - b) analytical supplements,
 - c) updates of selected indicators,
 - d) short systemic commentaries,
 - e) announcements of upcoming volumes,
 - f) informational materials,
 - g) other materials indicated by the Institute.
3. Additional materials do not automatically include consultations, individual analyses, expert meetings, presentations, training sessions, workshops, dedicated reports or studies prepared on request.
4. The Institute may make additional materials available according to its own schedule, unless the offer description provides otherwise.
5. The absence of additional materials in a given month or settlement period does not constitute grounds for requesting a refund of part of the package price, unless the offer description or an individual agreement provides otherwise.

10. Preferential access to additional publications

1. The Premium / Strategic Package may include preferential access to additional publications of the Institute, if this is provided for in the offer description.
2. Preferential access may apply in particular to:
 - a) additional special volumes,
 - b) extended monographs,
 - c) methodological publications,
 - d) selected additional reports,
 - e) selected printed publications,
 - f) selected digital publications.
3. Preferential access means the possibility to purchase additional publications on terms more favourable than standard terms, but does not mean an automatic right to receive those publications without an additional fee.
4. The level of preference, the deadline for using the preference and the scope of publications covered by the preference are defined by the offer description or an individual decision of the Institute.
5. The Institute may limit preferential access to publications available for sale, publications published in a given period or publications not excluded from promotional packages.

11. Access period

1. The access period under the Premium / Strategic Package is defined by the offer description, order or individual agreement.
2. If the offer description provides for an annual package, the access period is 12 months from the date indicated in the offer, order, invoice, purchase confirmation or access document.
3. If the offer description provides for another access period, that period follows from the content of the offer.
4. The Premium / Strategic Package covers publications included within the scope of the package and published or made available by the Institute during the access period.
5. The end of the access period does not deprive the Package purchaser of the right to use publications already received within the scope resulting from the applicable user licence, unless the offer description or an individual agreement provides otherwise.
6. The end of the access period means that there is no right to receive further publications, updates, new volumes or additional materials, unless the Package purchaser renews the package or obtains new access.

12. Change of publication schedule

1. The Institute reserves the right to change the publication schedule of regular volumes, special volumes, additional materials or translations.
2. A change of schedule may result in particular from:
 - a) substantive reasons,
 - b) editorial reasons,
 - c) the need to update data,
 - d) the need to deepen the analysis,
 - e) external events affecting the current relevance of a publication,
 - f) technical reasons,
 - g) organisational reasons,
 - h) a decision to change the order of topics,
 - i) the need to preserve the quality of publications.
3. The Premium / Strategic Package does not constitute an obligation of the Institute to publish volumes according to a rigid calendar rhythm, unless the offer description or an individual agreement expressly provides otherwise.
4. The Institute's priority is to maintain the substantive, analytical, methodological and editorial quality of publications.
5. A delay in publication does not automatically constitute grounds for a refund of part of the package price, unless the offer description or an individual agreement provides otherwise.

13. Exclusions from the package

1. The Premium / Strategic Package does not automatically include:
 - a) dedicated reports,
 - b) analyses prepared on request,
 - c) individual consultations,
 - d) workshops,
 - e) training sessions,
 - f) expert presentations,
 - g) public appearances,
 - h) confidential materials,
 - i) publications prepared for a specific client,
 - j) publications excluded from the package in the offer description,

- k) advisory services,
 - l) implementations of analytical tools,
 - m) individual updates prepared for the needs of the Package purchaser.
2. Publications or services listed in the preceding paragraph may be included in the Premium / Strategic Package only if the offer description or an individual agreement expressly so provides.
 3. The Premium / Strategic Package does not include the right to demand the preparation of a specific volume, specific topic, specific translation, specific special report or specific update.

14. Relationship to user licences

1. The Premium / Strategic Package defines the scope of publications covered by access, whereas the applicable user licence defines the manner of using those publications.
2. In particular, the Premium / Strategic Package does not independently extend the right to:
 - a) redistribute publications,
 - b) make publications available to third parties,
 - c) provide PDF files to clients or contractors,
 - d) publish full excerpts,
 - e) create copies,
 - f) digitise printed editions,
 - g) make publications available in repositories,
 - h) train artificial intelligence models on the Institute's publications,
 - i) create products substituting the Institute's publications.
3. The scope of these rights or restrictions follows from the applicable user licence.
4. If the Package purchaser uses publications in a manner exceeding the applicable user licence, the Institute may regard this as a licence breach regardless of the fact that the publication was covered by the Premium / Strategic Package.
5. In the event of any discrepancy between this document and the applicable user licence concerning the manner of using publications, the applicable user licence shall prevail.
6. In the event of any discrepancy between this document and an individual offer or agreement concerning the number of publications, format, language, access period or price, the individual offer or agreement shall prevail.

15. Price and nature of the service

1. The price of the Premium / Strategic Package covers the scope of access indicated in the offer description, order or individual agreement.
2. The package price is not a simple sum of the prices of individual publications, but a price for extended access to a defined scope of publications, informational priority, the convenience of package purchase, the possibility of including regular and special volumes in the package, and any preferential terms.
3. The package price may take into account in particular:
 - a) the scope of publications,
 - b) the type of user licence,
 - c) the number of users,
 - d) publication format,
 - e) language versions,
 - f) special volumes,
 - g) preferential access,
 - h) the strategic level of the package,
 - i) costs of handling, preparation, marking, shipping or technical access.
4. The Institute may change the prices of future Premium / Strategic Packages, their scope, structure, variants, limits of special volumes, scope of available formats and preferential terms.
5. A change in the price of future packages does not affect the scope of a package already purchased, unless the offer description or an individual agreement provides otherwise.

16. Breach of package terms

1. A breach of the terms of the Premium / Strategic Package is any use of publications covered by the package beyond the scope of the applicable user licence or beyond the scope defined in this document.
2. A breach of package terms includes in particular:
 - a) making publications available to unauthorised persons,
 - b) exceeding the scope of the applicable user licence,
 - c) exceeding the user limit,
 - d) exceeding the organisational scope,
 - e) providing PDF files to third parties,

- f) placing publications in repositories, intranet or systems accessible beyond the scope of the licence,
 - g) removing markings from digital copies,
 - h) circumventing technical safeguards,
 - i) creating materials substituting the Institute's publications,
 - j) using publications to train artificial intelligence models without the consent of the Institute,
 - k) presenting the methodology, models, structures or conclusions of the Institute as one's own.
3. In the event of a breach of the Premium / Strategic Package terms or the applicable user licence, the Institute may in particular:
- a) revoke access to digital publications,
 - b) suspend further provision of publications under the package,
 - c) block access to the digital reading room or user accounts,
 - d) refuse to renew the package,
 - e) refuse to sell further publications,
 - f) refuse participation in support programmes,
 - g) demand the purchase of the appropriate extended licence,
 - h) demand an additional payment corresponding to the actual scope of use,
 - i) pursue copyright protection,
 - j) seek damages or other claims provided for by law.
4. Revocation or suspension of access in connection with a breach of the package terms or the applicable user licence does not create an obligation to refund the package price or any other fees paid by the Package purchaser.

17. Amendment of package terms

1. The Institute may amend these terms, in particular in the event of a change in the structure of the Report K* series, a change in the method of distribution of publications, launch of a digital reading room, change in the licence system, change in the manner of publishing special volumes, changes in law or the need to clarify the rules for using the package.
2. The amended terms apply to packages purchased after the date of entry into force of the new terms, unless the offer description, individual agreement or applicable law provides otherwise.
3. The current version of the Premium / Strategic Package terms is published on the Institute's website or made available together with the offer.

18. Final provisions

1. In matters not regulated by this document, the applicable user licences, the Institute's regulations and applicable law shall apply.
2. If any provision of these terms proves invalid, ineffective or impossible to perform, this shall not affect the validity of the remaining provisions.
3. In the event of any discrepancy between this document and an individual agreement concluded with the Package purchaser, the provisions of the individual agreement shall prevail.
4. In the event of any discrepancy between this document and the description of a specific offer, the offer description shall prevail to the extent that it defines special access conditions.
5. In the event of any discrepancy between this document and the applicable user licence concerning the manner of using publications, the applicable user licence shall prevail.
6. The Premium / Strategic Package applies from the moment of purchasing the package, accepting the offer, obtaining access or concluding the agreement, unless the offer description or agreement provides otherwise.
7. These terms enter into force on the date of their publication on the Institute's website.