

Sir Roger Penrose Institute
for Interdisciplinary Sciences

Regulations of the Programme for the Support of Research on Complex Systems

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

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

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Contents

1	General Provisions	2
2	Definitions	2
3	Purpose of the Programme	3
4	Entities Eligible to Apply for Support	3
5	Subject of Support	4
6	Nature of Support	5
7	Amount of Support	5
8	Prohibition of Double Financing and Financing from Other Sources	6
9	Application Submission and Assessment Deadlines	6
10	Pool of Resources in a Given Call	7
11	Language of the Application and Attachments	7
12	Method of Submitting the Application	8
13	Application Assessment Criteria	9
14	Decision to Grant Support	10
15	Announcement of Results and Publication of Information on Granted Support	11
16	Nature of Decisions and No Appeal Procedure	11
17	Rules for Using Publications Covered by Support	12
18	Marking of Digital Copies	13
19	Applicant's Liability	13
20	Personal Data and Contact	14
21	Amendments to the Regulations	14
22	Final Provisions	15

1. General Provisions

1. These Regulations define the rules of operation of the Programme for the Support of Research on Complex Systems, conducted by the Sir Roger Penrose Institute for Interdisciplinary Sciences.
2. The Programme is intended to partially finance access to publications, reports, monographs and annual access packages to the Report K* series for scientific, educational, research and library institutions, as well as organisations conducting activities consistent with the statutory objectives of the Institute.
3. 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.
4. The Programme is financed from the resources of the Institute's Fund for Research and Systemic Analysis Support.
5. 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.
6. 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.
7. The establishment of the Programme does not create, on the part of any person, institution or organisation, 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 Research on Complex Systems.
3. **Fund** – the Institute's Fund for Research and Systemic Analysis Support.
4. **Applicant** – an institution, organisational unit or organisation applying for support under the Programme.
5. **Support** – non-refundable, targeted co-financing intended for access to a publication, volume, monograph, licence or annual access package to the Report K* series.
6. **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.
7. **Annual Access Package** – a package covering access to selected publications of the Report K* series within a specified settlement period and in accordance with the selected licence variant.

8. **Academic, library or institutional licence** – a licence enabling more than one person to use a publication, in accordance with the scope specified by the Institute. The scope of the licence may include in particular the number or category of authorised users, the organisational unit covered by access, the method of access, the duration of the licence, the scope of permitted use and restrictions concerning further making the publication available.
9. **Authorised users** – persons covered by the scope of the licence granted to the Applicant, indicated in the decision of the Institute or in the licence agreement, or belonging to a category of users expressly covered by a given licence, in particular employees, students, doctoral candidates, library readers, members of a research team or persons connected with a specific organisational unit, if the given licence so provides.
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 institutions that may use the Institute's publications in scientific, teaching, research, analytical, library, educational or social activity.
2. The Programme is intended to enable broader access to in-depth systemic analyses in environments that conduct research on complex systems, social, technological, political, economic, informational, civilisational or strategic processes.
3. The Programme serves in particular to support those institutions that may use publications of the Report K* series as research, teaching, library, expert or analytical 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.

4. Entities Eligible to Apply for Support

1. Support under the Programme may be applied for in particular by:
 - a) higher education institutions,
 - b) academic libraries,
 - c) scientific libraries,
 - d) scientific institutes,
 - e) research units,
 - f) organisational units of universities,
 - g) scientific student circles,
 - h) foundations and associations conducting scientific, educational, analytical or social activity,
 - i) think tanks with a research, educational or analytical profile,

- j) non-profit organisations implementing projects related to systemic analysis, education, science, security, technology, public policy or civic debate.
- 2. The Institute may also admit another entity to participate in the Programme if it considers that the entity's activity 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 Applicant may receive support under the Programme no more than once in a calendar year.
- 5. One Applicant shall be understood as a legal person, institution or organisation as a whole, regardless of the number of its internal units, faculties, departments, libraries, teams, projects, scientific circles or other organisational units.
- 6. If support in a given calendar year is received by one organisational unit operating within a given institution, the remaining units of the same institution may apply for support only in the following calendar year.
- 7. The rule limiting support to one Applicant in a given calendar year is intended to ensure the broadest possible distribution of the Fund's resources among different persons, institutions 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 annual access package to the Report K* series,
 - e) obtaining an academic licence,
 - f) obtaining a library licence,
 - g) obtaining an institutional licence,
 - h) 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.

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.
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 annual 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) small libraries,
 - b) independent educational units,
 - c) scientific student circles,
 - d) non-profit organisations conducting non-commercial educational or research activity,
 - e) social projects of significant educational, scientific or civic importance,
 - f) institutions that demonstrate limited capacity to cover the full price of access.
4. The Institute may grant support in an amount lower than requested.
5. 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 or where the application is not consistent with the objectives of the Programme.
6. 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.

7. One-off support may concern one publication, one licence or one access package, unless the Institute expressly decides otherwise in the conditions of a given call.
8. The maximum amount of one-off support for one Applicant is PLN 2000, unless the Management Board of the Institute determines a different maximum amount for a given call.
9. In the case of applications covering more than one publication, licence or access service, the Institute may limit support to one item indicated by the Applicant or independently select the item that best fulfils the objectives of the Programme.

8. Prohibition of Double Financing and Financing from Other Sources

1. The Applicant is obliged to indicate in the application whether it 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, it 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.
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 it 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 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 name of the Applicant,
 - b) contact details,
 - c) indication of the person responsible for contact with the Institute,
 - d) description of the Applicant's activity,
 - e) indication of the publication, licence or access package to which the application relates,
 - f) indication of the expected level of support,
 - g) description of the planned use of the publication,
 - h) justification of the need for support,
 - i) declaration of compliance with licensing rules,
 - j) declaration of the truthfulness of the data contained in the application,
 - k) declaration of acceptance of the rules of transparency of call results.

3. The application should be sent to the e-mail address indicated by the Institute.
4. The application should be signed by a person authorised to represent 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 institution or organisation applying for support,
 - c) the planned manner of using the publication,
 - d) the potential significance of the publication for the Applicant's research, teaching, education, public debate or analytical activity,
 - e) the scope of planned access, including the number of persons who are to use the publication,
 - f) the financial capacity of the Applicant,
 - g) lack of or limited access to institutional financing,
 - 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. In the case of applications concerning access for an institution, library or a larger number of users, the Institute may also take into account the scope of the planned use of the publication and the type of licence required.

5. The Institute may also refuse to grant support if the content of the application, the circumstances of its submission or circumstances known to the Institute indicate a risk of a conflict of interest, instrumental use of the Programme, breach of the independence of the Institute, circumvention of licensing rules or use of the publication in a manner contrary to the objectives of the Programme.

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 concluding 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 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 is assigned exclusively to the Applicant to whom it has been granted and to the publication, licence or access package indicated in the decision of the Institute. Support may not be transferred, resold, donated, lent, assigned or used for the benefit of another entity, organisational unit, consortium, project partner, related entity or other actual beneficiary without the prior consent of the Institute.
8. Granted support does not entitle the Applicant to extend access to persons, organisational units, libraries, teams, projects, consortia, partners or related entities that are not covered by the scope of the licence indicated in the decision of the Institute or in a separate licence agreement.
9. In the event of transformation, merger, division, liquidation, a change in the organisational structure of the Applicant, a change in the organisational unit using the publication or the transfer of the project to another entity, the Applicant is obliged to promptly inform the Institute. Further use of the publication requires confirmation by the Institute of the scope of the licence. The Institute reserves the right to refuse to transfer the licence in exceptional and justified cases, in particular where this could lead to circumvention of the Programme rules, extension of access beyond the original scope of the licence, breach

of licensing rules or use of the publication in a manner contrary to the objectives of the Programme.

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 institutions, organisations or other entities, the published information may include:
 - a) the name of the entity to which support has been granted,
 - b) the name of the organisational unit, if indicated in the application,
 - c) the project title, purpose of support or title of the publication to which the support relates,
 - d) the name of the support programme,
 - e) the 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. Failure to accept the rules for publishing information on granted support shall result in the application being left without consideration.
6. The Institute does not publish applications, justifications, contact details, addresses, identification numbers, financial information or any other data not listed in this section.
7. 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 entity 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. The scope of use of publications depends on the type of licence purchased and on the decision of the Institute, the licence agreement or another document specifying the access conditions. Use of publications is permitted only by authorised users and only within the scope covered by the given licence.
4. In the case of a single-user licence, the publication may be used only by one natural person.
5. Multi-user, library, academic, departmental or institutional access requires a separate licence specifying the scope of permitted use.
6. The Applicant is obliged to organise access to publications in a manner that prevents their use by unauthorised persons and to ensure that authorised users are informed of the basic rules for using the publications, in particular the prohibition of further making them available, copying, distribution, placing publications in repositories, internal systems or automated content processing tools, unless the licence provides otherwise.
7. A library, academic or institutional licence does not automatically include the right to interlibrary loans, making publications available outside the scope of authorised users, placing publications in a repository, remote access system, intranet, file catalogue, full-text database or transferring the file to other libraries, organisational units, project partners or users outside the scope of the licence, unless the given licence expressly provides otherwise.
8. 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) make publications available to users outside the scope of the licence, to other organisational units, project partners, related entities, consortia, libraries or institutions not covered by the licence,

- i) use publications as part of interlibrary loans, repositories, remote access systems, full-text databases, file catalogues or internal knowledge bases, unless the given licence expressly permits this,
 - j) enter the whole or substantial parts of publications into artificial intelligence systems, language models, automated analysis tools, databases, text corpora, datasets, RAG systems, internal repositories or other tools used for automated processing, reproduction, summarisation, classification, extraction or commercial use of content,
 - k) create and make available studies, summaries, presentations, scripts, tables, maps, compilations or other materials covering such a broad scope of the content of publications that they could replace access to the Institute's publications, interfere with normal use of them or limit the legitimate interest of the Institute as publisher and rights holder.
9. 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. Quoting may not lead to the reproduction of the whole or a substantial part of the publication, the creation of material replacing access to the publication, or the circumvention of licensing rules.

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, use of support contrary to the decision of the Institute, making the publication available to unauthorised persons or entities, use of support for the benefit of another actual beneficiary, extension of access beyond the scope of the licence, use of the publication in a manner inconsistent with these Regulations, or

obtaining support on the basis of false, incomplete or misleading information, the Institute may:

- a) withdraw the support granted,
 - b) request the return of the equivalent of the support granted,
 - c) withdraw the licence or restrict or block access to the publication covered by support if the licence is used in a manner inconsistent with these Regulations, the decision of the Institute or licensing rules,
 - d) refuse to grant support in the future,
 - e) restrict access to subsequent publications,
 - f) request payment of the difference between the full price and the price paid with the use of support, if the support was obtained or used in breach of these Regulations,
 - g) pursue protection of its rights in accordance with applicable law.
4. The Applicant is liable for the actions of persons to whom it makes the publication available under the institutional, academic or library licence granted, to the extent arising from the licence concluded. The Applicant is obliged to ensure that access to the publication is organised only for authorised users and that the manner in which the publication is made available does not allow persons or entities not covered by the scope of the licence to use it.

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 another 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 cancel, suspend, postpone or limit a call for organisational, technical, financial or other reasons preventing the proper conduct of the call.
3. The Institute may specify additional conditions of a given call, provided that they are not contrary to these Regulations.
4. In the event of any discrepancy between these Regulations, the conditions of a specific call, the application form, information published on the Institute's website, a social media post, an informational announcement or any other information about the Programme, these Regulations and the conditions of the specific call published by the Institute shall prevail.
5. In matters not regulated by these Regulations, decisions are made by the Institute.
6. These Regulations enter into force on the date of publication on the Institute's website.