



**Guidelines for Transnational Access and National Open Access
(TNA/NOA) to Research Infrastructures within MEET WP3-ILGE:
Processes, Procedures, and Management.**

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1. Introduction and scope of the document

Research Infrastructures are pivotal in cultivating collaborative efforts within the research community and fostering the principles of open science, open innovation, and global accessibility. They form the cornerstone for realizing the European Commission's three strategic imperatives (Open Science, Open Innovation, and Open to the World), working collectively to unify, disseminate, and optimize the use of critical national and regional research assets. This collective synergy opens avenues for scholars from academia and research institutes, ensuring their access to these facilities to foster shared development and mutual progress.

The significance of Research Infrastructures is underscored by the European Commission's strategic imperatives. On November 26, 2021, the EU Council Recommendation 2021/2122 on a Pact for Research and Innovation in Europe established the need to further enhance open access, capitalizing on existing and new European and national research infrastructures, across all scientific domains. This strategic move propels the foundation of scientific excellence and equips European science to engage, collaborate, and compete on the global stage. Notably, this strategic priority aligns with the ambitions of several European countries, exemplified by their commitment to HORIZON 2020 principles, compliance with national requests such as the PNR 21-27 and PNIR 21-27, and their collective vision for the forthcoming Valutazione della Ricerca 2020-2024 (VQR 2020-2024).

Within the context of MEET WP3 - ILGE, a comprehensive protocol has been established to coordinate and manage the services and procedures for enabling transnational access (TNA) and national open access (NOA). This effort draws upon the experience gained from previous involvement in the framework of EPOS-ERIC and the EC projects EXCITE and EUROVOLC. The initiative aims to provide access to the National Institute of Geophysics and Volcanology (INGV) and partner institutions, including the University “Roma Tre” (UniRomaTre), the

National Research Council of Italy (CNR) and National Institute of Oceanography and Experimental Geophysics (OGS), responsible for ILGE Activities 3.1-3.10.

At its core, the TNA and NOA initiatives in ILGE seek to promote open science and innovation, as well as to enhance the efficient and effective use of laboratory equipment, by bringing together and opening up key national facilities to students (i.e. BSc, MSc, PhD), researchers, professors and technicians. This forward-looking initiative envisions providing a platform where individuals can exchange facilities, expertise, and ideas, all in pursuit of a common goal—enhancing our understanding of the intricate dynamics characterizing natural processes within the Earth system.

ILGE's foundational vision revolves around the establishment and rejuvenation of critical facilities within multidisciplinary laboratories throughout Italy. In alignment with this vision, the creation of a TNA/NOA network through two pilot calls aims to optimize investments in research infrastructures and catalyze collaboration at both national and international scales. Within ILGE, the management of TNA/NOA in the framework of Activity 3.11 guarantees centralized coordination for access to all WP3 laboratory facilities, by designing services and procedures to deliver competitive access to network laboratories in alignment with open science principles.

This document outlines the procedures practiced within ILGE for preparing and executing two pilot TNA calls to the facilities available in the network. This workflow serves as a general framework for the development of access procedures and modalities at laboratory facilities of ILGE partner institutions, offering a blueprint for regulating access to research infrastructures over a longer temporal scale.

2. Definitions

Transnational access (TNA): Transnational access provides free-of-charge access to laboratory facilities for applicants/Users (both EU and non-EU) located in a different country than the host institution.

National open access (NOA): Free-of-charge access to laboratory facilities on a national scale for applicants/Users employed in the same country as the host institution, with the exclusion of intra-institutional access.

Facility: A component of a research infrastructure (or a coherent group of facilities) along with their associated services, typically located at the same physical address. A facility may comprise one or multiple pieces of equipment and it serves as a TNA/NOA provider.

TNA/NOA activity: The execution of a granted TNA/NOA proposal at a facility within the ILGE network, which can involve either physical access or remote service.

Equipment: A single analytical device located at TNA/NOA facilities, which applicants/Users apply to access.

Research infrastructure: The infrastructure serving as TNA/NOA provider, granting access or offering service(s) to equipment and associated laboratories as part of a facility.

Organization: Refers to the research infrastructure as defined within the MEET-WP3 ILGE network.

Installation/Laboratory: This represents the physical location where equipment associated with facilities are housed, and thus it is the place where TNA/NOA activities take place.

Physical access: TNA/NOA activity where the Users physically visit the facility to perform sample analysis.

Remote service: TNA/NOA activity where the Users benefit from services, such as sample analysis performed by the operator at the facility.

Applicant/User: Individual who applies as the primary User or participates as secondary User for proposed research conducted using the selected equipment at the hosting facility or via remote service. The secondary User is allowed only in proposals involving field activities and Physical Access. In such cases, the primary and secondary Users are collectively referred to as “User group”. Individuals eligible for these roles include, but are not limited to researchers, doctoral candidates, technical staff and students (BSc, MSc, and PhD) actively participating in research within the framework of their studies.

Access Agreement: The agreement signed between the facility and the User/User group under a single approved TNA/NOA project, encompassing all aspects of service provision and regulations.

Access Days: Days within the access period on which access is actually delivered and during which expenses incurred by the User/User group are eligible for reimbursement. Access days may include holidays and weekends, but only if research activities are conducted on those days. For all projects, Access Days must be clearly specified in both the Access Agreement and the Scientific Report. The number of Access Days may differ from that in the Access Agreement, only if a valid reason is provided.

TNA/NOA Management Team: The team responsible for overseeing and managing TNA/NOA activities.

Facility Manager: The individual responsible for a specific facility handling all matters related to the TNA/NOA activities at the facility.

Review panel: An advisory panel of experts selected to evaluate the scientific excellence of proposals received during the TNA/NOA call and the positive outcome of the technical evaluation.

3. Preliminary steps for the TNA/NOA calls

3.1 Establishment of the TNA/NOA Management Team

The TNA/NOA Management Team, established under ILGE Activity 3.11, guarantees the centralized coordination of access to all WP3 laboratory facilities, by designing services and procedures to allow competitive access to the network laboratories. The tasks performed by the Management Team include various activities such as establishing TNA/NOA workflows, publishing online information about laboratories offering TNA/NOA, advertising open calls, providing guidance to applicants, organizing the evaluation process, reporting on the outcomes of the calls and organizing dissemination meetings. Additionally, the TNA/NOA Management Team produces a range of templates and documents, including call texts, technical and scientific evaluation forms, Access Agreements and policies, as well as proposal and reporting templates.

3.2 Compilation of available facilities

In the preparation of TNA/NOA calls, creating a comprehensive catalog of available facilities is a fundamental step that serves as a key resource for streamlining the process of offering laboratory access to potential Users. This catalog is essential for facilitating the identification of willing research infrastructures, noting that laboratories within the ILGE network are not obliged to participate. To facilitate this process, the TNA/NOA Management Team, in collaboration with MEET-WP11 personnel has undertaken the critical task of identifying existing infrastructures as part of the initial preparatory phase for the first call. Through this effort, a dedicated [data portal](#) has been established, and a comprehensive catalog has been compiled, including information on organizations, installations, facilities, and related equipment. This information is seamlessly integrated into the web platform for application submissions. Each Facility Manager will then decide on each call for access to facility availability.

The catalog not only provides technical specifications of facilities and equipment but also includes contact details of Facility Managers and their respective organizational affiliations.

Users can select the organization and installation of partner laboratories within WP3-ILGE and gain detailed insights into each facility of the network, including a preliminary version of the Access Agreement (section 3.7.2). The final Access Agreement is provided by the facility once the project has been granted access and is customized individually for each project. This underscores ILGE TNA/NOA's focus on facilities as the primary recipients of applications. Once a facility is selected, the catalog provides comprehensive data sheets for each piece of equipment associated with that facility. Each piece of equipment represents an independent component of the facility, and its usage during research activities carried out during TNA/NOA access may vary. These equipment details serve primarily to help applicants understand the facility's capabilities, though the final decision on equipment usage during research activities lies with the facility's staff. This decision takes also into account prior communication with the User to best align with project needs. The catalog is not only a vital part of the ILGE network, but it also represents a dynamic entity which is periodically updated to account for: i) new facilities and pieces of equipment made available in subsequent calls; ii) new facilities and pieces of equipment acquired in the framework of the MEET project, representing also a milestone of the infrastructural developments attained in the framework of ILGE.

3.3 Defining access modalities

The modalities for accessing laboratory facilities within the framework of ILGE TNA/NOA are Physical Access (i.e., hands-on) and Remote Service (i.e., send-in-sample). Note that both modalities may not be available for every facility.

Physical access entails the direct involvement of the User, or the group of Users, in all research activities at the specified laboratory facility, as outlined in the granted proposal. The maximum number of access days per proposal is specified in the online application portal and is ultimately decided by the facility for each project. Typically, only one User is eligible for physical access; however, exceptions allowing an additional User may be granted for projects involving field-based activities and Physical Access during the access period. Users who are granted physical access on a project cannot have physical access granted on another project. In any case, the number of Users allowed to participate in TNA/NOA activities rests with the facility, within

these limits. Details regarding the logistics of access are outlined in the Access Agreement (see Section 3.7.2), which must be signed by both the User/User group and the Facility Manager before the access period begins. Users may incur individual expenses, such as living and transport costs, which can be partially or fully covered by the facility according to different modalities, as detailed in Section 7.4. Additional researchers may be allowed by the facility to access the premises and participate in the scientific activities. However, these individuals are not considered part of the TNA/NOA activities and, therefore, should not be included in the Access Agreement. These individuals are also not eligible for reimbursements from the ILGE network and are not subject to reporting obligations (Section 7).

Remote service is a modality in which the User does not physically visit the facility but provides samples ahead of agreed access days, typically via shipment, if samples are required for research activities. This approach offers significant advantages, such as minimizing the carbon footprint associated with facility access in compliance with the [DNSH principle](#) and mitigating the potential impact of adverse circumstances affecting individuals' travel plans and natural phenomena that could disrupt logistics. This, in turn, reduces their impact on project deliverables.

3.4 Defining access costs to TNA/NOA facilities

Access costs for research infrastructures to be covered in ILGE TNA/NOA calls consist of infrastructure costs and User costs. The budget allocated for these costs is assigned before the access period begins.

The infrastructure costs are costs related to the use of ILGE infrastructures in ILGE. They will be calculated as direct costs, which are expenses related to the use of the infrastructure exclusively during the access period. In the frame of the MEET project, it will not be possible to consider personnel costs related to facility use during TNA activities for the two pilot calls. As such, direct costs in ILGE include only consumable materials. In a future perspective, the ILGE network aims at establishing itself as a TNA/NOA provider. Accordingly, it is foreseen to adopt an estimate of infrastructural costs based on the actual costs, which encompass all expenses incurred by the infrastructure for the facility's operation. These expenses may be

covered within the budget allocated to each infrastructure for the expected service days within the calendar year, and include consumables (including eventual replacement of equipment parts), personnel and maintenance. Proper accounting records will be needed for estimating actual costs.

Within the framework of the ILGE network, direct costs related to consumables are deemed eligible based on the actual number of access days conducted at the facility.

User costs encompass personal expenses incurred during access, including transportation and living costs directly associated with the access period and location, as well as potential sample shipment expenses. Two options are available for covering User costs, based either on a *per diem* or on actual expenses, both within pre-established limits. More details on reimbursement procedures are given in section 7.4.

3.5 Development of the online application platform

The platform for advertising calls and collecting proposals streamlines TNA/NOA management by guiding applicants through the proposal submission process and providing support to both Users and Facility Managers with the required documentation. It provides access to information about facilities, general eligibility rules and User obligations, funding and reporting guidelines, as well as privacy and data policies. On each call for access, the portal will provide Users with information about available facilities and related equipment, period of availability and maximum number of access days per project and for the entire call. Additionally, the portal includes links to the repositories for collecting necessary documents from Users both before and after access.

Within the framework of WP3-ILGE, the collection and management of applications during the two TNA/NOA pilot calls will adopt an existing platform that will be adjusted to fulfill ILGE needs. Simultaneously, WP11 will develop and maintain a new dedicated online platform. This platform will improve the organization of future TNA/NOA calls, incorporating the lessons learned from the TNA/NOA pilot calls conducted during the MEET project.

3.6 Selection of the reviewers' panel

The review panel includes experts from various geoscientific fields represented by partner institutions. The expertise of the panel's members is indicated by keywords describing the main geoscientific topics of interest. These keywords will be made available to Users during the submission proposal phase to facilitate the matching process, ensuring that projects align effectively with the expertise of the reviewers. The review panel primarily consists of external reviewers to the hosting institutions (more than 50%). In all circumstances, it shall not include scientists working in the facility to which the application is directed. This approach will help to prevent conflicts of interest. The Management Team will directly contact scientists on the basis of their expertise, and the conditions to serve as reviewers will be regulated by an appointment letter.

3.7 Preparation of documentation

3.7.1 Call texts

The call text provides potential applicants with all the necessary information to begin the application process for the TNA/NOA programme. This information includes details on the call opening and the period of access, eligibility criteria (e.g., nationality requirements, compliance with the ILGE Data Policy), evaluation criteria and available facilities within the network. The primary purpose of the call text is to inform potential applicants about the application process and rules, important deadlines and the access period. It also serves as the foundation for promoting the TNA/NOA call, announcing its opening and guiding prospective applicants to the online application portal where they can complete the application. Applicants and third parties involved in the TNA/NOA programme are responsible for thoroughly reading the call text and the associated documentation before proceeding to the application portal. A link to the online application portal is provided in the call text. More detailed information about each

facility, such as specific periods of facility availability, details on equipment and contact information for Facility Managers are provided within the online application portal.

3.7.2 Access Agreement

The Access Agreement serves as a comprehensive document that lays out the terms and conditions governing access within the TNA/NOA project, ensuring clarity, accountability and a smooth collaborative process. This document addresses various aspects of the TNA/NOA activity, including access protocols, financial arrangements, compliance with the ILGE regulations and Data Policy, as well as privacy standards.

Key components of the Access Agreement include:

- TNA/NOA project details: This section outlines crucial project information, such as the project title, project ID, the designated Facility, the responsible Facility Manager, the chosen type of access (physical or remote service), and the project's timeframe;
- User Compliance with Research Institute rules: Users are required to adhere to a set of rules and regulations that ensure the safe and efficient use of the Facility. Depending on the type of access (physical or remote), compliance may encompass health and safety guidelines, access protocols, and more. Misconduct can result in exclusion from both the ongoing project and future ILGE TNA/NOA activities;
- Data Management: The Access Agreement enforces the FAIR (Findable, Accessible, Interoperable, and Reusable) principles for research data, emphasizing proper data storage, archiving, and open accessibility. Additionally, it outlines specific terms for data publication, including a maximum moratorium period and requirements for peer-reviewed publications;
- User Compliance with ILGE Regulations: Users are obliged to comply with ILGE Data Policy and TNA/NOA General principles, which may include documenting the effective number of access days, submitting scientific and financial reports, and providing feedback on their TNA/NOA experience;

- Reimbursement of User expenses: This section outlines the provisions and procedures for financial reimbursement of TNA/NOA activity and may include specific details established by the facility, which must comply with ILGE regulations;
- Liability and Confidentiality: These sections outline the provisions related to liability and confidentiality, detailing responsibilities and commitments of both parties

It is important to note that specific conditions within the Access Agreement may vary among different facilities, aligning with their unique needs and resources within the TNA/NOA collaboration. Each facility adopts a customized version of the Access Agreement tailored to the specifics of the scientific activities to be conducted, and is responsible for providing this document to the User/User group. The Management Team collects the Access Agreement once it has been countersigned by both parties through a dedicated repository, accessible via a link provided on the ILGE website.

Access Agreements for projects involving physical access must specify the exact days on which access is provided. In cases where projects involve field-based activity, which is the only circumstance under which two Users can participate in the physical access activities, the Access Agreement must be signed by both Users. For remote service projects, the Access Agreement must also be provided. In this case, the agreement should specify the period during which the analyses are conducted rather than indicating the exact days for each analysis, covering the total access days granted to the User. In any case, the Access Agreement should contain the number of Access Days to be provided.

At any time after the project approval, the Facility Manager may propose to the User to switch modality of access, to mitigate any circumstance adverse to the project fulfillment. All such amendments must be included in an updated version of the Access Agreement and promptly communicated to the Management Team. If agreement is not met between the User and the Facility Manager, it is the ultimate decision of the TNA/NOA Management Team if the TNA/NOA project and the related Access Agreement is to be discontinued.

3.7.3 Submission Template

The submission template for TNA/NOA is tailored to collect specific information for the evaluation of the project. A fac-simile of the submission template is available in the online application portal. Below is a description of the fields that applicants will encounter when submitting their applications in the online portal:

- **User information:** This section collects information about the Primary User and the eventual Secondary User, including their names, academic positions, affiliations, and contact details.
- **Scientific and Technical Objectives of the Project:** This section collects essential project information, including the project's title and acronym. Applicants are required to describe the project's main objectives, methodology, work plan, the project's benefits to the scientific community, emphasizing the project's uniqueness and innovative aspects. Applicants must also provide a list of keywords to describe the project's focus and detail a preliminary dissemination plan. Additionally, applicants can emphasize the scientific excellence of the User/User group.
- **Selection of the Facility and access type:** This section focuses on the selection of the facility. Applicants specify the access type (TNA vs NOA), the access mode (Physical Access or Remote Service) and the proposed period for access. They also provide a brief explanation of the Facility's relevance for the project. If the project involves sample analysis, relevant information about these samples should be included.

Applicants are also asked to provide their Curriculum Vitae (CV), which is essential for assessing their qualifications and expertise. A cover letter should also be provided, in case the primary User is a student (MSc, PhD). In addition to the CV, this section includes a declaration that the User/User group are either insured from the sending institution or will take full responsibility for any damage to users, facilities and facility personnel that may be caused on their part during TNA/NOA activities. Applicants are also required to upload a copy of personal documents to verify their identity.

3.7.4 Reporting documents

Following completion of TNA/NOA projects, Users are required to submit reports to a dedicated online form, covering both logistics and scientific aspects of their visits. The scientific and financial report template is available to the User/User group through the submission portal to create a comprehensive account of the scientific activities, access period and incurred expenses related to TNA/NOA activities. In more detail, the scientific section of the report includes a scientific summary followed by a more in-depth description of the main outcomes and results of the investigation conducted in the laboratory, possibly integrated with a preliminary interpretation of the data and the potential for future continuation of the research. Prospective outcomes of the scientific activities, such as dataset and peer-reviewed publications, presentation at conferences, and dissemination activities, should also be included in the scientific report. Any encountered challenges or critical issues should also be detailed, serving to justify any deviations from the work plan outlined in the Access Agreement, including eventual changes in the days of delivered access.

The financial section of the report must detail all costs incurred during TNA/NOA, including exact dates for each expense, travel and sustenance costs for physical access and sample shipment costs for remote service projects. Receipts do not need to be included with the report, as they are to be provided to the access provider, in the form and modality requested by the access provider itself. The modality of reimbursement in projects involving physical access, as well as the modality of sample shipment in projects involving remote service, are always to be agreed with the Facility before the User/User group incur any expense.

The scientific and financial report, signed by the User/User group and countersigned by the Facility Manager, must be uploaded to a dedicated online form. This form also allows the User/User group to provide feedback on the TNA/NOA experience (see Section 7.3). The information collected during reporting serves as the basis for the Management Team to assess any challenges or critical issues within the TNA/NOA programme, allowing the network to grow and improve. This information will also be used to populate WP3-ILGE reporting documents, in order to record the progress of the access program during the MEET project.

4. Proposal submission procedure

4.1 Pre-submission feasibility check

Once the call opens, the proposal submission procedure takes around two months. The TNA/NOA applicant is required to interact with the selected Facility Manager to discuss the technical, logistic and financial feasibility of the proposal before submission. The Facility Manager may suggest modifications to the proposal, such as adjustments to the number of samples, experiments, access days, or experimental conditions. In some cases, re-direction of the proposal to more appropriate facilities may also be recommended. It is the responsibility of the applicant to incorporate these amendments in the proposal before proposal submission and the actual feasibility assessment (see section 5.2).

4.2 Proposal submission phase

The TNA/NOA applicant submits the proposal through the online application portal described in Section 3.5. To be eligible for TNA/NOA, applicants must ensure they meet specific TNA/NOA rules, which include the following:

- For the TNA programme, the User/User group must be based in a EU*+EFTA^{\$}, or in a extra-EU*+EFTA^{\$} country, but must not be based in the same country where the facility is located.
- For the NOA programme, the User/User group must work in the same country as the host institution, with the exclusion of intra-institutional access. Nonetheless, projects may take place in the same city as the User/User group affiliation, although in such circumstances no User cost is eligible to be reimbursed.
- The proposal is eligible only if the User/User group is allowed to disseminate results in compliance with the ILGE Data Policy and any additional requirements specified by the facility in the Access Agreement.

[EU* = EU member states and countries associated with other european programmes, determined also on the basis of geographic criteria (Iceland, Norway, Albania, Bosnia and Herzegovina, North Macedonia, Montenegro, Serbia, Turkey, Israel, Moldova, Switzerland, Faroe Islands, Ukraine, Tunisia, Georgia, Armenia, Kosovo, United Kingdom).

EFTA^{\$} = member states of European Free Trade Association (Iceland, Liechtenstein, Norway and Switzerland).]



All personal data collected from the User/User group during the application process are used solely by the ILGE Network for the operational management of TNA/NOA and for the proper performance of its legal tasks and duties related to communication and research. Data handling complies with the General Data Protection Regulation (GDPR – Regulation (EU) 2016/679) and the [institutional Privacy statement](#) adopted by the ILGE network, which applicants are required to review and consent upon application. No personal data is shared with the external review panel during the review phase, nor will personal data be rented, sold, or otherwise shared with or provided to third parties other than for reporting purposes.

5. Proposal evaluation

5.1 Eligibility assessment

Proposal evaluation starts after proposal reception and lasts between one and two months. Upon receiving applications, the Management Team conducts an initial eligibility check to ensure compliance with ILGE TNA/NOA regulations. Applications compliant with regulations are then forwarded to the Facility Managers to assess their technical feasibility, and stripped of all personal information to be sent to the scientific review panel for the subsequent scientific evaluation.

5.2 Technical evaluation

The technical evaluation ensures that the User/User group needs and project requirements align with the laboratory's capabilities. The Facility Manager serves as an internal reviewer assessing the technical feasibility of the proposal based on the project's scientific goals and the User's requests in terms of equipment and duration of access. To standardize this technical assessment, a dedicated form is provided to Facility Managers.

A feasible project could undergo minor amendments at the request of the Facility Manager (e.g., details on sample preparation or changes in the proposed period for access) to optimize the use of the requested equipment. During the technical evaluation, the Facility Manager assigns a feasibility ranking to the proposals, which is used along with other criteria, to prioritize access to overbooked facilities for proposals with the same scientific score (see Section 5.3). Additionally, within the context of the technical evaluation, the Facility Manager also specifies the maximum number of projects that can be conducted at the facility during the access period. If projects are found to be unfeasible during the technical evaluation, the Facility Manager may suggest amendments that could help the applicant review the project for future TNA/NOA calls. As outlined in Section 4.1, to ensure the best outcomes in terms of technical feasibility, applicants must reach out to the Facility Manager before finalizing their application. This consultation is mandatory and provides an opportunity to discuss strategies and procedures related to the requested equipment, as well as the logistics for the TNA/NOA visit/service. Failure to contact the Facility Manager prior to submission will result in the application not

being considered. The final number of projects to be conducted at each facility during each call for access is to be confirmed by the Facility Manager during the technical assessment.

5.3 Scientific evaluation

If the proposal is determined to be technically feasible in terms of its technological and logistical aspects, it undergoes scientific evaluation, which is aimed at assigning scientific score and ranking. A minimum score is necessary for the proposal to be evaluated positively. The review processes for TNA/NOA are designed to ensure that project evaluation is based exclusively on the scientific quality of the proposals. To maintain fairness, the ILGE network adopts a double-blind evaluation process of TNA/NOA proposals, ensuring transparency, anonymity, gender equality and the overcoming of regional barriers. To ensure consistency in the scientific assessment of all proposals, a standardized evaluation form is provided to the scientific review panel. Different aspects of the proposed research are evaluated, including innovativeness and overall quality of the scientific rationale, the clarity of the proposal text and the robustness of the proposed methodology.

5.4 Evaluation outcome & Proposal ranking

The final project ranking and approval are determined based on the scientific evaluation outcome, which is assigned by the scientific review panel (see Section 3.6). Proposals that successfully pass both technical and scientific revisions are ultimately ranked based on the score assigned during the scientific evaluation. This ranking is used only when there is an excess of access demands in comparison to available supply at a given facility. In such a case, proposals are assigned to the overbooked facility based on their score. In any case, access is granted solely after agreement between the User/User group and the Facility is reached, the details of which will be included in the final Access Agreement, signed by both parties. Acceptance of the proposal does not grant access until confirmation is provided by the facility.

Proposals with lower scores may be considered for assignment to the desired facility if higher-ranking projects do not meet agreement, or to another facility capable of conducting the

requested research project, provided that the respective Facility Manager agrees. If decisions need to be made between proposals with equal ranking, priority is given to early career scientists (i.e., individuals who received their highest certificate within the past 7 years), Users who have not previously visited the facility within the TNA/NOA programme. Priority will be also given to proposals considered more optimal for facility use during the technical revision (see above). A positive evaluation of the proposal does not guarantee access in subsequent calls, and a new proposal should be submitted if the project cannot be carried out during that call. Disruptive events, unforeseen logistical issues or equipment malfunctions at the facility may preclude access, based on the evaluation of the Facility Manager.

Even positively evaluated proposals may still be subject to small amendments at the request of the Facility Manager. It is the responsibility of the Facility Manager to request minor changes to proposals that have received a positive technical evaluation, if needed. These requests are intended to be fulfilled by the applicant within the short time frame between the review phase and the access period, by direct communication with the Facility Manager.

Rejection of proposals is communicated to the Users after the evaluation phase, along with eventual feedback provided by Facility Managers and reviewers. These comments can be instrumental in helping applicants improve the weaker aspects of their research projects, especially if they intend to submit an improved version of their proposals in a subsequent call for access.

In some instances, it may occur that the maximum number of accepted proposals for a certain facility is not met. In such cases, there may be unspent dedicated TNA/NOA budget left. In this situation, the Management Team may decide to make this budget available to already approved projects. Before finalizing the Access Agreements, the Facility Manager may decide to distribute the left-over funding over the accepted TNA/NOA projects, for instance, by increasing the number of samples/days for the proposed experiments. Subsequent changes to the Access Agreement are, in all circumstances, subject to evaluation by the Management Team before approval.

In the ILGE TNA/NOA programme, in alignment with Horizon 2020 and Horizon Europe, the total amount of access granted to extra-EU*+EFTA^S countries cannot exceed 20% of the total

access delivered. This limit is based on the total number of access days delivered in ILGE during the MEET project. Accordingly, if positively evaluated projects lead to the number of access days requested by Users from institutions based in extra-EU*+EFTA[§] countries exceeding this limit during the duration of the ILGE TNA/NOA programme, proposals from these countries in the last call for access will be selected based on the scientific merit to ensure compliance with the 20% limit. The Management Team may propose to Facility Managers and Users to reduce the number of access days requested for certain projects, in order to comply with this limit, while still ensuring that access can be delivered in the context of such projects.

[EU* = EU member states and countries associated with other European programmes, determined also on the basis of geographic criteria (Iceland, Norway, Albania, Bosnia and Herzegovina, North Macedonia, Montenegro, Serbia, Turkey, Israel, Moldova, Switzerland, Faroe Islands, Ukraine, Tunisia, Georgia, Armenia, Kosovo, United Kingdom).

EFTA[§] = member states of European Free Trade Association (Iceland, Liechtenstein, Norway and Switzerland).]

6. TNA/NOA operational phase

6.1 Signing the Access Agreement

The Management Team provides a template for the access agreement, which the Facility Manager is responsible for adapting to the facility. The Facility Manager then provides the final copy of the agreement to the Management Team for fac-simile publication on the ILGE website. The agreement may be tailored to meet the specific requirements of each project, if necessary, and must be completed and signed by both the Facility Manager and the User/User group before the starting date of each TNA/NOA project. Thus it is recommended that the document is finalized and signed prior to making any travel and logistics arrangements related to access. By signing the Access Agreement, the User/User group agrees to data management and reporting policies, which are accessible to the User/User group via the website. Once signed, the document should be forwarded to the Management Team via a dedicated repository. Any amendments to the Access Agreement must be made through a new Access Agreement, which should be countersigned by the Facility Manager and submitted to the Management Team via the same repository. Such changes are not accepted *a priori* and should be approved by the Management Team. Any violation of the terms of the Access Agreement or the ILGE regulations as detailed in these guidelines and related documentation (Data Policy, funding guidelines, call text), may result in the discontinuation of the ILGE TNA/NOA project at any time, based on the decision of the Management Team and the Facility Manager.

6.2 Access to facilities

Successful proposals are eligible to be granted access to facilities. In ILGE, the access phase on each call encompasses a total of up to six months, during which individual facilities may be available for the entire period or part of it. Depending on the access modality chosen (Remote Service or Physical Access), the TNA/NOA operational phase varies. In the case of Remote Service, the Facility Manager or designated laboratory personnel perform experiments based on the User's instructions and sent-in samples. In contrast, the Physical Access modality

requires the User/User group to participate directly in experiments within the selected facilities, under the guidance of the Facility Manager, who provides safety regulations and essential training. Users are responsible for organizing visits, travel arrangements, and accommodation. Physical access in ILGE is normally provided to only one User, except for TNA/NOA projects involving field-based activities. Thorough communication between Users and Facility Managers is encouraged to optimize the planning of research activities. Before incurring any expenses, the User/User group must coordinate logistics with the Facility Managers to ensure that such expenses are eligible for reimbursement under the ILGE TNA/NOA programme. Should equipment malfunction occur, whether before or during access, the project may be halted. Access days affected by equipment issues are rescheduled, if possible, at the discretion of the Facility Manager. Under certain circumstances, a transition from Physical Access to Remote Service may also be deemed necessary. This decision is typically proposed by Facility Managers when it is considered the most effective way to complete a project that has been interrupted. Such a change may be prompted by factors like a significant increase in costs associated with maintaining physical access during equipment downtime. Normally, only one round-trip travel is eligible for reimbursement; however, this rule may be waived in cases of equipment malfunction or other unforeseen disruptive event. In any case, reimbursement limits per project must still be adhered to, except for special circumstances to be evaluated solely by the Management Team.

7. Post-TNA/NOA

7.1 Reporting templates

Once the project is concluded, the User/User group is required to submit reports detailing the activities carried out during the access period. A total of one scientific report per project and one financial report per User must be submitted. All reports are generated using a dedicated template and collected by the Management Team via a dedicated repository, after being signed by both the User/User group and the Facility Manager. The report template is a comprehensive document that includes scientific methods, experimental setup, preliminary results and conclusions, and potential future outcomes that are expected to result from this project.

Additionally, the report template includes information about the access periods during which TNA/NOA activities were carried out, the actual number of access days delivered during the project, any critical issues encountered during the research activities and expenses for which reimbursement is sought. Matters related to the reimbursement of the User/User group expenses will be handled exclusively by the local administration of the organization department/division to which the laboratory/installation belongs.

The reports must be signed by the User/User group and reviewed by Facility Managers, who will agree on the report's content and countersign the document. Then, Users are required to upload the reports to a dedicated repository handled by the Management Team, no later than one month after completing the project. Projects that are not properly reported will not be considered as completed. Accordingly, only projects for which scientific and financial reporting are provided, along with a completed User feedback questionnaire, can be considered eligible for reimbursement.

After the conclusion of the access period for each call, the Management Team elaborates the reports and the feedback. The Management Team then produces a final TNA/NOA report, which documents the performance of the call, including anonymized statistics on the applicants, User feedback, and lessons learned. This report is provided as part of the MEET deliverables report.

7.2 Data sharing

Data produced during access within the ILGE network will adhere to [FAIR](#) principles. This means data will be deposited with metadata through trusted repositories (Findable), have persistent identifiers and made available under open licenses (Accessible), in a common format following open data standards (Interoperable), and comply with high-quality documentation practices (Reusable), according to the modalities mentioned below and fully detailed in the ILGE TNA/NOA Data Policy, available on the ILGE website. Compliance to FAIR principles will be ensured by requesting Users to publish their data sets on the [GFZ Data Services repository](#) or any other repository in use by the EPOS MSL community. Alternatively, if the data formats or size are unsuitable for these portals, Users are requested to publish data in

another appropriate data repository under a CC:BY 4.0 license, which permits data sharing and reuse with proper attribution. An embargo period of two years, during which metadata publication must be ensured, may be adopted. The duration of the embargo will be determined based on the duration of the main external project (e.g. PhD or ERC) associated with the TNA/NOA project. If no specific project exists, the embargo period is set to 2 years. In all cases, this embargo period begins the day after the TNA/NOA project is completed. During the embargo period, the data will not be made publicly available, but a DOI will still be assigned to the dataset publication. If the User/Users group is unable to comply with these moratorium periods, Facility Managers are obliged to ensure compliance. Based on arrangements made in the Access Agreements between the host facility and the User, a copy of the raw data is also left with the host facility and the User/User group. The User/User group also commits to adhering to a maximum moratorium period of 1 month for the creation of metadata, a copy of which must be provided in the User's scientific and financial report, and 3 months for the data set publication. Both periods start the day after the TNA/NOA project is completed. All details regarding data management are included in the ILGE TNA/NOA Data Policy available on the ILGE website. As the document may be updated, Users are encouraged to regularly review the policy to stay informed of any changes.

If peer reviewed publication(s) result from the data acquired through TNA/NOA activities, Users must ensure open access publication as detailed in the ILGE TNA/NOA Data Policy. They are also required to acknowledge the MEET project, the ILGE network and the support from the NGEU Programme, in any resulting data set and peer-reviewed publication, using the standard statement: *“This publication results from work conducted under the transnational access/national open access at <FACILITY NAME - LABORATORY NAME>, supported by WP3 ILGE - MEET project, PNRR - EU Next Generation Europe program, MUR grant No. D53C22001400005.”*.

7.3 Feedback questionnaire

As part of the commitment to continuously improve the TNA/NOA program, User feedback is highly valued. Therefore, a comprehensive Feedback Questionnaire will be developed to assess the TNA/NOA User experience. The questionnaire covers aspects about the application and proposal submission process, specific choices made in terms of facility and modality of access, the efficiency of the application platform, the quality of communication with Facility Managers and delivery of information to Users, the sufficiency of safety regulations and training, and overall satisfaction with the TNA/NOA program. Users will be encouraged to share their suggestions for improvements, any challenges encountered, and recommendations for fellow researchers. By collecting this valuable feedback no later than a month after facility access, the aim is to enhance the TNA/NOA program and better cater to the needs of the research community, ensuring a seamless and productive experience for all participants.

7.4 Reimbursement procedures

In ILGE, the maximum allowable costs for travel and living expenses are centrally determined by the Management Team. As outlined in Section 3.4, User costs encompass personal expenses incurred during access, including transportation and living costs directly associated with the access period and location, as well as potential sample shipment expenses. Two options are available for covering User costs:

- a. Reimbursement and reporting through a *per diem*, in accordance with ministerial regulations for institutions that adhere to this procedure. *Per diem* rates vary based on institutional arrangements, and the reimbursable amount per individual researcher is subject to a cap determined by the ILGE network.
- b. Reimbursement and reporting of actual expenses for institutions unable to implement a *per diem* system. This method involves the submission of documented expenses directly associated with the period of TNA/NOA service utilization at the host institution. Receipts, boarding passes, and travel tickets, either in their original form or as copies depending on the facility's regulation, must be provided to the Facility Manager for this option. In this case as well, reimbursement is subject to a spending limit established by the ILGE network.



Reimbursement procedures are the responsibility of the institution, and, depending on its internal administration, may more specifically pertain to the department that houses the facility providing access. The modality of reimbursement depends on the institution's policies, and in some cases, per diem reimbursement may not be allowed. Specific details concerning the limits and typologies of User costs to be considered eligible for reimbursement by the ILGE network are to be found in the ILGE TNA/NOA funding regulations, available on the ILGE website. All information regarding the expenses for which Users request reimbursement must be included in the report provided no later than one month after the end of the access period, which is countersigned by the Facility Manager. Only Users who have correctly deposited the report on the dedicated repository and ensured compliance with the ILGE Data Policy and ILGE TNA/NOA regulations will be eligible for reimbursement.