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1. Introduction

The ATMO-ACCESS project aims to develop sustainable processes for efficient and effective provision of access to distributed atmospheric research infrastructures (RIs). With a goal to provide guidelines and recommendations for governance, management and funding (see D8.1 and D8.2 [1]), ATMO-ACCESS seeks to investigate, pilot and implement suitable mechanisms for sustainable access provision. Accepting that any such mechanism will involve the proposal of access activities, to maintain high standards and foster excellence, the assessment and evaluation of proposals must be central to the provision, whatever form they may take. Robust evaluation is necessary for several reasons, though fundamentally the driver is the optimum distribution of finite resource. ATMO-ACCESS work package 7 (WP7) was designed, constructed and implemented to deliver an effective programme of trans-national and virtual access (TNA-VA). As a measure of the success of WP7, the access programme itself was subjected to two evaluations. The interim evaluation was conducted midway through the project and reported in Deliverable D7.1 [2], with the final programme evaluation reported in D7.2 [3]. To supplement the programme evaluations, it was recognised that an assessment of the proposal evaluation process was provided in the form of the current supplementary deliverable D7.3 to describe the means whereby the programme was constructed to be competitive, fair, effective and transparent. There are many competing tensions in the formulation of evaluation criteria and processes, explored and outlined in the context section below.

2. Context

Deliverables D7.1 and D7.2 build on the KPIs in the ACTRIS Access Management Plan, approved by the ACTRIS GA. Whilst no KPIs have been explicitly defined for the evaluation of the access proposals, within ATMO-ACCESS a series of criteria have been developed with the aim to embed competitiveness, fairness, effectiveness and transparency into the process of access provision.

Access is a process by which users can avail themselves of the services of one or more facilities provided within an RI. The time and material resources of the facility and facility provider (and user) are finite and, those made available to external users, variable. Management of the demand for access to the RI services will be necessary wherever demand outstrips supply. Capacity to accommodate users and their various requirements and maturity of service provision will vary between facilities, and not all services or facilities will necessarily be equally attractive or suitable for all users. This will depend upon a wide range of external (e.g. geographical location) and internal (e.g. instrumentation payload) factors. There may be other imperatives and strategic reasons to manage the user access across the RI that may include (but are not limited to) encouragement of new users, balancing access across gender, career stage, geographical location, sector or access modality, explorations of novel discipline areas,



alignment with societal challenges and programmatic opportunities and new ways to exploit available capacity. In addition to assessing proposals purely in terms of scientific and technical excellence, such considerations need to be embedded in the evaluation process for demand management of user access. The application process comprises three stages – proposal submission by the user through the PASS application system, (<https://passactris.smapplly.io/>, MS42 [4]), evaluation by expert reviewers against pre-defined criteria and panel rank ordering and selection of successful proposals by the Strategic Trans-National and Virtual Access Review Board (STVB).

3. Application process design effectiveness for efficient evaluation

For any targeted strategic imperative or desired programmatic outcome, access evaluation must generate objective metrics to enable evidence-based informed decision. The first step in the process for access provision is therefore the solicitation of the required information for evaluation in the form of proposals in an unambiguous and consistent format.

a. Formulation of proposal fields

To conduct fair evaluation of a proposal, the desired information must be solicited in the proposal pro forma. This requires appropriate formulation of the proposal fields to clearly address all evaluated criteria. Across the atmospheric RIs, and the predecessor component infrastructures, there have been many years of successful access provision from which to draw expertise and experience of evaluation. This enabled rapid convergence by the Service and Access Management Unit of the ACTRIS Head Office (SAMU) on a conditional set of proposal fields for initial pro forma formulation according to each access category. In broad terms, the conditional fields were directly tailored to provide all information necessary for objective evaluation against i) general information on the applicant and selected facility followed by ii) conditional requests for details of the research and innovation or training services, as appropriate for the proposal category.

b. Access feasibility

Since it is not obligatory for an applicant to contact a service provider prior to proposal submission, a successful access feasibility assessment from the facility is a prerequisite to inform the evaluation ahead of the merit review. Applicants are advised to contact the service provider at the facility before developing their proposal. The extent of any co-design of proposals between users and service providers has deliberately not been universally specified throughout the development of the ATMO-ACCESS TNA/VA programme. The types of projects, facilities, services and sectors served have varied throughout the programme and successful



access can require varying degrees of involvement of the service providers according to user requirements. The access feasibility assessment needs to account for the availability of any necessary co-design of access as well as all other provider support requirements.

c. Merit review

The form of the merit review is determined by the goals of the specific element of the access programme being requested. In ATMO-ACCESS, these were subdivided into several categories:

- i. Excellence-driven: Primarily purposed to deliver excellent scientific or technical results with the potential for novel scientific outputs and / or potential for societally impactful outcomes;
- ii. Technical Need-driven: Aiming to improve the technical capabilities to deliver enhanced atmospheric science outcomes, without necessarily delivering immediate scientific results;
- iii. Training Need-driven: Focused on the provision of training of users in skills relevant to atmospheric sciences and / or use of instrumentation or tools available to the host facility and required by the user to enhance their career and / or scientific goals;
- iv. Market-driven: Targeting the delivery of new or improved products, processes or services to market with high potential for market penetration.

It is important that a multiplicity of categories is supported and that the evaluation criteria weightings continue to be used to encourage balance in access to match strategic requirements of the RI. The information required for the merit review in each category differs, with the weighting for each criterion varied for optimal access selection. The merit review fields and evaluation criteria classifications are detailed in the ATMO-ACCESS TNA General Evaluation Guidelines produced and regularly updated in WP9 based on feedback received and ongoing developments in the programme. The criteria groupings for each access category are briefly described and justified here in sections 7 to 10, along with the weightings that were converged upon as the programme developed. **During the application process the available scores for each section should be transparently communicated both in the proposal and elsewhere in guidance documentation.** To this end, the General Evaluation Guidelines were openly available on the same page of the ATMO-ACCESS website (<https://www.atmo-access.eu/tna-call-application/>), and linked to the version current at the time of the open call. It should be noted that the ATMO-ACCESS programme comprised 4 general open calls and 3 specific (EU Green Deal-aligned, remote access and Multidisciplinary) calls. The evaluation criteria for the specific calls included “fit to call” requirements. As a result of some applications with a poor fit to the call, the specific calls had a lower success rate than the general calls. Whilst general calls were proven to be most popular, the specific calls were successful in guiding the



strategic direction and alignment. **Targeted calls should be retained for this purpose and evaluation should have sufficient weight on the “fit to call” to ensure the intended objectives are met.**

4. Selection and Roles of Reviewers

The aim was always to secure a minimum of 2 expert reviews for each access proposal. The numbers of access proposals to facilities across the RI can be considerable, especially in open calls which are most popular. Solicitation of a sufficient number of proposal reviewers with the requested scientific expertise and prerequisite skills to cover the breadth and number of proposals for all calls, and with homogeneity in their judgement, is a perpetual challenge. SAMU has made the exemplary proposal submission and evaluation system, PASS, enabling extremely efficient access for applicants and reviewers alike. Nevertheless, with increasingly competing pressures on academic time, additional spiralling peer-review duties are unattractive, voluntary and unpaid, and **substantial effort must be made to minimise review requirements as far as possible. Whilst recognising the essential requirement for rigorous scientific review, as much automation of assessment as possible should be implemented to reduce reviewer burden.** Evaluation of proposals against criteria in each classification requires a level of specialist expertise and judgement, as well as clear scoring guidelines. **Guidance for reviewing should be as clear as possible and objectivity in the scoring should be made as simple as possible by tight definition of fit to assessment criteria.** Such guidance will enable the greatest chance of homogeneity in review allowing comparability and, so far as possible, objective access selection.

5. Roles of the Strategic TNA/VA Access Board (STVB)

The STVB was established as the primary decision-making body for programme development, with its constitution and terms of reference defined in the initial project implementation document. The STVB plays a pivotal role in each task in the programme development work package WP7, and as such its establishment was the first activity of WP7. It is essential that such a board with strategic oversight gains confidence of the RI and consensual mandate, and its membership was ratified at the first ATMO-ACCESS General Assembly. The STVB was chaired by the WP7 leader and comprised representatives from each type of facility across the RI, with observers from each WP, ensuring expertise across the RI and balance across the requirements for the access programme. The membership covered a range of expertise: remote-sensing, in-situ gas and aerosol and atmospheric processes. The terms of reference of the STVB, as specified in the CA, were to



- i) Assimilate and analyse information provided from WP1 to WP6 representatives and take decisions on the timing, nature and thematic scope of calls for TNA/VA to achieve the strategic goals of the programme;
- ii) Conduct panel selection of supported TNA/VA projects based on reviewer recommendation and all relevant information provided by the project Scientific Steering Committee. Within each selection panel meeting, a reflection on the evaluation criteria and moderation of any ambiguity and contradiction in reviewer comment and scores was conducted. Careful consideration of both scores and associated comments is required in moderation to account for heterogeneity between reviews;
- iii) Liaise with WP2 to ensure that the communication strategy reflects and is adapted to the TNA/VA calls;
- iv) Monitor success of the call strategy, informs WP8, based on information received from WPs, and on key performance indicators developed in WP2.

Each of these roles has a direct influence on the development, implementation and evaluation of each individual access and of the programme in its entirety. The STVB thereby ensures the selection of successful access proposals most effectively satisfies the evaluation criteria and contributes to the strategic objectives of the programme. It is therefore **strongly recommended that any RI constitutes an internal expert panel to provide strategic oversight of access programme development and evaluation criteria.**

So far as possible, the scoring of proposals in evaluation should be objective, and if possible automated. Where there is any ambiguity, it is important that scores are allocated according to the criteria by a sufficiently qualified body, following a consistent and transparent process to ensure fairness. A key role of the STVB that leans heavily on their expertise, experience, trusted status by project partners and hence mandate for distribution of resources, is the resolution of discrepancy at the funding thresholds and of contradictory review scoring. By definition, such “greyzone” decision-making is not black and white and cannot be formulaic and requires careful review-by-review and proposal-by-proposal consideration. This is particularly necessary when considering the moderation of scores provided by multiple reviewers, whose interpretation of the evaluation guidelines and criteria weightings will vary. **Owing to this lack of formula, any such adjustments, moderations, discrepancy resolutions and rationalisation of contradictions must be clearly communicated for full transparency** (see section 14).



6. Roles of Access Providers

Numerous considerations influence the roles of facility / service providers in delivering access. These may relate to the maturity of the facility and service delivery, the strategic objective of the proposal or call, the alignment of the proposal with other external programmes or any number of other factors. A user may simply wish to select a well-defined service from a catalogue and to be directed to the most appropriate facility by the RI coordination. Alternatively, they may have quite specific requirements, requiring detailed dialogue with providers and development of interfaces to specialised equipment or instrumentation. Users may have a wide range of experience and knowledge with a range of drivers, expertise and simplicity of requirement or otherwise. The interaction between user and provider pre-proposal can range from mere indirect contact with the RI to detailed co-design of collaborative cooperation. Co-creation of access may be more necessary if a call aims to engage users from outside the atmospheric domain, or from outside the research sector. **It is therefore recommended not to prescribe a pre-defined degree of engagement between user and provider before proposal construction. Involvement of a provider in proposal co-design should not, a priori, influence the reviewer or panel evaluation.** The provider must submit an access feasibility assessment prior to evaluation and it may be envisaged that this will be more likely to be positive if there has been prior contact from the user, but access may or may not require detailed discussion. In practice, it is challenging not to favour construction of a proposal that demonstrates better understanding of a facility's capabilities as would be possible with a provider's input into a co-designed application. An example of such desirable provider input could be in the in-house practical understanding of the timescales, duty cycles and background interferences that would influence the likelihood of success in a programme of work in a chamber campaign. A novice, or indeed even experienced, user would likely lack such appreciation. Beyond the feasibility report, there is no pre-defined role for the provider ahead of delivering the facility access beyond a willingness to accommodate the user. **The provider can give their assessment of the proposed access in the feasibility report, but should have no role in the evaluation and access decision, since they cannot provide the strategic insight to access across the RI beyond their own facility nor understanding of the balanced distribution of resources across the RI.**

7. Evaluation criteria classification goals – Excellence-driven proposals

The evaluation requires information to address 3 groups of criteria. Scoring is from a total of 54 points (including the 3 bonus points, see section 8):



- a. Scientific & technical value: informs the degree to which the objectives, context and motivation are scientifically and technically sound, demonstrating creativity and originality and with potentially transformative impact on the state-of-the-science. Cross-disciplinarity is encouraged, as is alignment and synergy with programmes and initiatives beyond the RI. There are 30 points available for this group of criteria, 55.6% of the total.
- b. Novelty & innovation: enables evaluation of the application of new technology, methods or analytical approaches, the potential for commercial / industrial application and the novelty of the approach. There are 15 points available for this group of criteria, 27.8% of the total.
- c. Quality & efficiency of implementation: allows the workplan feasibility and methodology to be evaluated, along with the application and dissemination of results. Also details the user group track record, balance, expertise and experience. There are 6 points available for this group of criteria, 11.1% of the total.

8. Evaluation criteria classification goals – Technical need-driven

The evaluation requires information to address 2 groups of criteria. Scoring is from a total of 48 points (including the 3 bonus points, see section 8):

- a. Scientific relevance: allows assessment of the needs of the scientific community and end users as served by the instrument, and its exploitation plans. There are 30 points available for this group of criteria, 62.5% of the total.
- b. Technical need: enables evaluation of whether the service satisfies a current or future measurement requirement, whether a training element is involved and the suitability of the user group profile. There are 15 points available for this group of criteria, 31.25% of the total.

9. Evaluation criteria classification goals – Training need-driven

The evaluation requires information to address 2 groups of criteria. Scoring is from a total of 43 points (including the 3 bonus points, see section 8):

- a. Scientific/learning objectives and motivation: allows assessment of the appropriateness of the training objectives and motivation, the usefulness and benefits of the training to the user and their organisation and the exploitation and dissemination of the training by the user within their organisation. There are 30 points available for this group of criteria, 69.8% of the total.



- b. Quality of the applicant: enables evaluation of the quality and potential of the applicant to benefit from the training and contribute to the field. There are 10 points available for this group of criteria, 23.2% of the total.

10. Evaluation criteria classification goals – Market-driven

The evaluation requires information to address 2 groups of criteria. Scoring is from a total of 48 points (including the 3 bonus points, see section 8):

- a. Scientific / technical value and innovation: allows assessment of the scientific context and likelihood of success of the proposed innovation, its potential for improved product or process development and the market potential. There are 30 points available for this group of criteria, 62.5% of the total.
- b. Quality and efficiency of the implementation: enables evaluation of the workplan, the commercialisation and protection pathway, the technical and scientific competence of the team and the novelty of the proposed access. There are 15 points available for this group of criteria, 31.25% of the total.

11. Goals of bonus evaluation criteria common to all access categories

In addition to the access category-specific criteria, each proposal can benefit from enhanced evaluation according to the profile of the access leadership and group participation. In alignment with the Horizon Europe prioritisation requirements, these bonus criteria aim to encourage gender balance, new users of facilities and participation of early career scientists and students at PhD level and below. Therefore, as outlined in section 3a), the pro forma requires proposal fields related to the user group profile that do not directly relate to the classifications in sections 7 to 10. These fields contribute to the bonus scoring in the evaluation, but do not require reviewer input. The bonus criteria are applied identically across categories, meaning that they are least important for proposals in the scientific excellence category (5.5% of the available total) and most important for those in the training need-driven category (7% of the available total).

12. Special Cases

There are a small number of special cases requiring deviation from the standard process and flexibility in approach.

- a. Pilot demonstrators in WP6 (International Stakeholders, Technology Innovators and Public Authorities): Work Package 6 was specifically designed to pilot new trans-national



access modalities to support research, technology and innovation. Specifically, five tasks were conducted to design, implement and evaluate access benefiting international stakeholders, technology innovators and public authorities. Building on preliminary stakeholder workshops and a series of follow-up discussions, the pilot modalities most suited to the stakeholder groups were explored and developed. The international stakeholders targeted were ESA and EUMETSAT, with an aim to engage with these non-traditional users with whom the RI has had limited interaction, to exploit clear synergies with the atmospheric RI capabilities, providing direct benefit to the stakeholder, widen the RI user base and potential funding streams and enhance the visibility of the RI. The targeted technology innovators included instrument and sensor developers, exploring how they could make effective use of the RI facilities for calibration, testing and benchmarking. The targeted public authorities were identified as those having responsibility for regulatory air quality monitoring, for implementing interventions to achieve air quality targets and for data-driven decision support for atmospheric episode response. In all cases, substantial engagement with the users was necessary even at the stage of familiarisation with the RI capabilities, prior to the co-creation of access to the facilities.

Whilst the access was managed with the assistance of the STVB, all access in the WP6 pilots involved a substantial element of co-design. Moreover, the evaluation process for proposals within the pilots was dictated and determined within WP6. Owing to the nature of the pilots, which primarily aimed to demonstrate novel modalities of access, no optimisation of individual proposal evaluation criteria was possible, though the success of the pilot programme as a whole was reported in D6.5 [5].

- b. Fast-track access: this was designed for the agile provision of access within a time-limited window aiming to flexibly exploit opportunity that would otherwise be inaccessible through a “standard” access stream. Theoretically, fast-track access was available for any category. The specific criterion for fast-track access was strictly applied and only available for genuinely urgent access (such as for unusual meteorological events and unforeseen atmospheric phenomena), the meaning of which was clearly communicated. Rapid proposal review is required for fast-track access and frequently this required solicitation from STVB members. All other evaluation criteria were identical to non-fast-track access applications. Whilst the evaluation of fast-track access always required exceptional activity outside the standard cycle, its opportunistic provision is important as it allows timely responses to urgent scientific needs. **It is therefore recommended to retain the capability for fast-track access wherever possible.**



13. Management of demand for access through competitive selection

It is important for access provision to the RI services to be demonstrably competitive, whilst encouraging participation from less experienced or underrepresented users to maximize the RI's scientific and societal impact. There will never be unlimited capacity, so availability of resources (funding, staff time, facility availability) must be allocated efficiently, necessitating implementation of a process to manage the demand for access and optimise facility usage. Demonstration of competitive allocation of resources requires definition and use of objective metrics. There are many potential mechanisms for competitive access dictated by the resource availability and user demand including pre-definition in a call or across the programme of a) success rate; b) minimum score threshold; c) number of successful projects or d) total / fractional budget allocation (potentially for each proposal category). Each has advantages and drawbacks, and it can be argued that all are somewhat arbitrary. Nonetheless, demand management has been found to be an effective tool for distribution of access against allocated budget in the ATMO-ACCESS project (see D7.2 for a summary of the overall programme effectiveness, and D6.5 for that of the pilots). For the programme outside of the pilots, the overall success rate was 75% (80% for the general calls, 64% for the specific calls). Central to this was the centralised decision-making process, implemented through the STVB and afforded by the strategic overview, and drawing on the insight, of the coordination, project office, Scientific Advisory Board (SAB) and Scientific Steering Committee (SSC). One consideration in delivery of a competitive access programme is the sporadic nature of calls. This is necessary for the logistics of managing the proposal volume through the PASS system, of securing reviews and for panel selection. Continuously open general calls are widely considered attractive, though evaluation and demand management would require substantial resourcing and modification to the proposed process. There may be special cases where continuity of access availability is desirable, such as when attracting private sector use or for rapid access, though this should be considered exceptional.

Ahead of programme design, a fixed budget may be available for access, as in ATMO-ACCESS, and all IA and INFRA-SERV projects. **The process for distribution of the maximum budget for access at each facility in an RI in such a fixed budget scenario should be fully transparent, enabling appropriate management of the volume of access and monitoring of success rate and resource usage throughout the programme.** This allowed the strategy to be broadly defined a priori and a programme to be designed and implemented to provide access relatively smoothly to consume the available resources. As the programme unfolded, with a greater number and variety of calls than originally envisaged, it was possible to iteratively optimise the success rate between calls and in response to the demand. This was done during



the selection panel meetings of the STVB with full availability of access provision data from SAMU and in full knowledge of the profiling of budget and consumption of allocated access. This enabled management of proposal success rate in each category through setting grade boundaries according to aggregate scores from reviewers. It is not clear that a sustainable funding model will always be profiled in such a way, and an RI may have a revenue generation model where income is less guaranteed and “lumpier”. Nonetheless, an experienced expert panel with strategic oversight has the best chance of effectively managing a competitive access programme in any funding model. **It is strongly recommended that the decision-making body for a competitive access programme is sufficiently experienced and endowed with the necessary strategic insight and the mandate from project partners to allocate available resources, in-project, fairly and transparently.**

14. Transparent communication of the evaluation principles

In any organisation or project where resource is rationed and allocated to manage the demand, details of the decision-making processes must be effectively communicated. Without effective communication, any information vacuum will be rapidly filled. Partners and stakeholders will have insufficient context and strategic oversight to understand decisions related to resource allocation, irrespective of whether they are affected (positively or negatively) by the process. Since there is complexity in the design, construction, implementation and especially the evaluation of an access programme, it is important to clearly communicate the basis for the programme design and the principles for proposal evaluation. This is especially the case at the time of communicating proposal outcomes. **For full transparency, these application results should be delivered to the user and provider with reviewer / panel comments and provided in the context of the results from the call, along with score thresholds and percentage success rates in each proposal category along with any changes and requirements for grade adjustment or moderation.** It can be challenging to understand the reasons for proposal decisions, and it can avoid later misunderstanding by presenting any envisaged changes in emphasis in the evaluation process between calls to project partners before the call. Such communication could take advantage of webinars and open consultation meetings. The internal communication strategy concerning the evaluation process might use a variety of tools (web, email etc.) to reach the widest range of stakeholders. **It would be useful to produce a handbook that included the principles for programme design, including the rationale for the calls along with the target criteria for proposal success.** It may be that the target is a specific proposal success rate. If this is the case, it can be stated, even if this is achieved in the selection panel by managing the grade boundary thresholds. In order to maintain confidence in the process and the bodies responsible for its implementation, there



should be regular discussion and renewal of the STVB mandate, at the GA of the project or its organisational equivalent.

15. List of Recommendations

1. A multiplicity of call categories should be supported and evaluation criteria weightings used to encourage balance in access to match strategic requirements of the RI.
2. The scores available for each proposal section should be transparently communicated both in the proposal pro forma and elsewhere in guidance documentation.
3. Targeted calls should be retained and evaluation should have sufficient weight on the “fit to call” to ensure the intended objectives are met.
4. Review requirements must be minimised as far as possible. Whilst recognising the essential requirement for rigorous scientific review, maximal automation of assessment should be implemented to reduce reviewer burden.
5. Guidance for reviewing should be as clear as possible and objectivity in the scoring should be made as simple as possible by tight definition of fit to assessment criteria.
6. An RI should constitute a sufficiently qualified internal expert panel to provide strategic oversight of access programme development and evaluation criteria.
7. Scoring of proposals in evaluation should be objective so far as possible, and automated where possible. Where there is any ambiguity, it is important that scores are allocated according to the criteria by the expert panel, following a consistent, fair and transparent process.
8. Any adjustments, moderations, discrepancy resolutions and rationalisation of contradictions by the panel must be clearly communicated for full transparency
9. A pre-defined degree of engagement between user and provider before proposal construction should not be prescribed. Involvement of a provider in proposal co-design should not, a priori, influence the reviewer or panel evaluation.
10. The provider can give their assessment of the proposed access in the feasibility report, but should have no role in the evaluation and access decision, since they cannot provide the strategic insight to access across the RI beyond their own facility nor understanding of the balanced distribution of resources across the RI.
11. The capability for fast-track access should be retained wherever possible.
12. The process for distribution of the maximum budget for access at each facility in an RI should be fully transparent, enabling appropriate management of the volume of access and monitoring of success rate and resource usage throughout the programme.



13. The decision-making body for a competitive access programme must be sufficiently experienced and endowed with the necessary strategic insight and the mandate from project partners to allocate available resources in-project fairly and transparently.
14. For full transparency, evaluation results should be delivered to the user and provider with reviewer / panel comments and provided in the context of the results from the call, along with score thresholds and percentage success rates in each proposal category along with any changes and requirements for grade adjustment or moderation.
15. A handbook including the principles for programme design, including the rationale for the calls along with the target criteria for proposal success should be openly available.

References

- [1] [D8.2 A strategic access plan for access provision to atmospheric RIs](#)
- [2] [D7.1 Interim Evaluation Report on Access Programme](#)
- [3] [D7.2 Final evaluation report on access programme](#)
- [4] [MS42 Access Management Platform](#)
- [5] [D6.5 Report on evaluation of the TNA pilots and future recommendations](#)

