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Smart Grid-Efficient Interactive Buildings

Deliverable D8.6

Data Management Plan v1

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Deliverable D8.6

Data Management Plan v1

Deliverable number	D8.6
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Lead beneficiary	UBE
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WP	8
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2nd review	08.01.2024	Sections Elaboration	UBE
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ABBREVIATIONS

Abbreviation	Name
DMP	Data Management Plan
EC	European Commission
ERC	European Research Council.
EU	European Union
FAIR	Findability, Accessibility, Interoperability, Re-usability
HE	HORIZON Europe
RI	Research Item
PC	Project Coordinator
WP	Working package

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EXECUTIVE SUMMARY

EVELIXIA project's primary aim is the social engagement of citizens not only as validators of the solutions but also, as their co-designers by applying methodologies for citizen and consumer engagement and advanced human-to-building interfaces.

During the EVELIXIA platform deployment and validation, different actors (i.e., DSOs, DNOs, ESCOs, aggregators) from various sectors (electricity, heating/cooling, mobility) will exchange data for providing B2G and G2B services and they will participate in the development of Business Models showcasing the economic viability of the solutions proposed.

This document constitutes the first version of the Data Management Plan (DMP) and it outlines how the research data generated during and after the project development will be managed. Essentially, the Data Management Plan (DMP) is the illustration of the data management processes which will be carried out in the WP8. This deliverable also describes the methodologies which will ensure that the efficiency of data collection and dissemination.

The F.A.I.R. (Findable, Accessible, Interoperable, Re-usable) Data Management guidelines, outlined by EC for Horizon Europe projects, in conjunction with EC's DMP template, were followed to produce this document. An initial version of the project's DMP (Data Management Plan as a deliverable, D8.6) will be submitted covering the first 6 months of the project. The deliverable D8.7 will follow at a later stage of the project as an updated version of D8.6 including EVELIXIA's refined technical, monitoring and data requirements.

EVELIXIA project's data will be produced by contributions from partners, demonstrations of the pilot sites, peripheral evaluators' activities, and extensive literature review.

The data derived from the project will be anonymized for impact assessment and research purposes. All the personal data will be treated in line with the:

- REGULATION (EU) 2016/679 of the European Parliament and of the Council of 27 April 2016 and it will be accessible for authorized users only (validated via authentication processes)
- Regulation (EU) 2018/1725 of the European Parliament and of the Council of 23 October 2018 on the protection of natural persons regarding the processing of personal data by the Union institutions, bodies, offices, and agencies and on the free movement of such data, and repealing Regulation (EC) No 45/2001 and Decision No 1247/2002/EC

This report illustrates the data handling framework within the EVELIXIA project.

1 INTRODUCTION AND OBJECTIVES

Research and innovation projects like EVELIXIA are the source of vast sets of data.

In EVELIXIA these data will be generated by scientific research, laboratory analysis, testing in demo sites, observations, questionnaires, feasibility studies and literature reviews. For the majority of these projects, after the data are used and the project's activities are concluded, they remain unexploitable. Therefore, the partners involved in the EVELIXIA project should ensure that this data remains available to researchers and scientists around the world in the future.

Purpose of the document

The Data Management Plan (DMP) aims to map the road for managing data created and collected from EVELIXIA's researchers while developing the post-project access to these data. The DMP document will be evolved throughout the project's timeframe and will continuously shape the way that the research data will be handled. Reviews and updates will be performed during specific time periods.

The DMP also defines the methodology of producing, collecting, and storing the data, the categories of these data and the policies and protocols that identify how these data will be used.

To sum up, EVELIXIA DMP covers the data handling during and after the project, the categories and formats of data that will be generated/collected/stored, the methodologies and standards that will be applied and ways for the data to be protected and openly accessible. There is also a synopsis of the datasets that will be produced in the project. The next version of the DMP (D8.7) will enter in more detail and describe the practical data management procedures applied by the EVELIXIA project.

Target Audience

The target audience for this deliverable is:

- European Commission
- EU Parliament
- Partners and Advisory Group in the EVELIXIA project
- Horizon Europe projects and other energy related projects (clustering activities)
- Organizations, specialists, and stakeholders involved in the EVELIXIA demonstration cases
- Relevant public and private organizations

2 DATA MANAGEMENT IN HORIZON EUROPE

According to the European Research Council (ERC) established by the European Commission (EC):

“Under the Horizon Europe all projects that generate research data have to submit a DMP (at the latest, six months after the start of the project), deposit such data in a ‘trusted’ repository and provide access to them, under the principle ‘as open as possible, as closed as necessary’. There are also a number of requirements concerning the bibliographic and administrative metadata of deposited data, which also have to be made openly accessible to enhance findability and facilitate reuse.”

The DMP evaluates the main characteristics of the data management policy that will be used by the consortium regarding all the datasets that will be generated by the project.

The data should be accessible, unambiguous, quantifiable, compatible, and usable beyond the original purpose of collection.

EVELIXIA participating in the Open Research Data Pilot of the European Commission, which means that all the data should be saved in a repository where anyone (free of charge) could access, exploit, reproduce and disseminate:

- the required data and methods to validate the results presented in scientific publications (including metadata).
- any other data produced and indicated in the data management plan.

The EVELIXIA DMP ensues the Guidelines on FAIR Data Management in Horizon Europe, released by the European Commission Directorate – General for Research & Innovation. The FAIR DMP template has been intended to be applicable to any Horizon Europe project that produces, collects, or processes research data. Consistent with these guidelines the

management of data should be based on basic principles, which determine how research data should be processed so that they can be accessed, understood, exchanged, and re-used. This means that data must be findable, accessible, interoperable, and re-usable.

Table 1 – Clarifications of Terms

Terms	Clarification
Research data	The facts that lead to research conclusions and consisting of data that have been collected, observed, produced, or obtained from commercial, government or other sources, followed by analysis resulting to the generation of original research results. These results are used to produce research papers and publications.
Open research data	Data that can be freely accessed, mined, exploited, reproduced, and disseminated.
Secondary data	Data already available, irrespective of the research to be carried out.
Open access	Online access to outcomes produced by research activities at the minimum cost (or free) to the end-user.
Metadata	Data describing and explaining other data which can make finding and/or working with them easier.
Research data repositories	Data online archives that manage, share, access, and store research datasets.

As a guideline the EC proposes a number of topics to be addressed within a DMP such as:

- Data Summary
- FAIR data
- Allocation of resources
- Data security
- Ethical aspects
- Other issues

Each one of these topics has its own sections, with issues that has to be dealt with. The first version of DMP is not required to provide answers to all the issues, however as DMP is meant to be an evolving document, more details and information will be provided by the next versions.

3 EVELIXIA'S DATA MANAGEMENT SUMMARY

The Data Management Plan has an essential role in the appropriate and efficient management of the project's data. As a first step, the categories of data that will be produced in the framework of the project have to be identified. Therefore, during EVELIXIA project:

- Data will be retrieved from accessible information such as scientific publications on the field of energy efficient buildings, developments in energy storage technologies and/or other areas related to the objectives of the project.
- Data will be produced by project partners' activities, such as expert meetings, evaluation reports, reviews, technical data processing, business process development, activities on demonstration sites and other related events.
- Data will be obtained from third party recipients and use cases, such as interviews, presentations, meetings with beneficiaries and synergies with other related projects.

Purpose of the data collection/generation

Through the duration of the EVELIXIA project, data will be produced, gathered, archived, and processed by the partners of the project, stakeholders, and third-party participants. All the data will be used for research, impact assessment and evaluation of deliverables/proposals.

Types and formats of data generated/collected.

Table 2 presents a synopsis of the different datasets that will be generated during the EVELIXIA project along with the source, the archiving format, and the WP responsible for the generation/collection of these data sets.

Table 2 – Types of Data Generated/Collected

Data type	Source	WP	Format
Partners contacts collection	Openly available	7,8	.xls, .pdf, .txt
Quantitative data	Raw data	1,2,3,4,5,6,7,8	.xls, .csv, .txt, .pdf
Expert interview data	Primary data	1,2,3,4,5,6	.doc, .xls, .csv, .txt, .pdf
Demonstration generated data	Raw data	5	.xls, .doc, .csv, .txt, .pdf, .xml
Workshops data	Primary data	1,2,3,4,5,6,7,	.doc, .xls, .pdf
Validation data	Primary data	1,2,3,4,5,6,	.xls, .csv

Data Protection

All the datasets generated during the EVELIXIA project will be anonymised for impact assessment and research purposes. Personal data of the participants will be gathered only for the project's submission process, and their informed consent will be required. All personal identifiers will be encrypted and stored securely.

The personal data protection processes will follow the REGULATION (EU) 2016/679 OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL of 27 April 2016 on the protection of natural persons regarding the processing of personal data and on the free movement of such data, and until valid, the repealing Directive 95/46/EC (General Data Protection Regulation). The relation of applications will be coded and will be available for external evaluators with such a coding. In case data needs to be transferred to non-EU partners, we will obtain approvals from the Data Protection Office.

Artefacts and Access Rights.

In the beginning of the project, the artefact contribution of each partner was requested. Table 3 summarises the artefacts that will be produced and their status considering whether they are publishable or not.

It is worth to mention that all future additions and updates will be documented under the relevant deliverables.

Table 3 – Artefact types

Partner	Artefact type	Artefact	Publishable/ Non-Publishable
CERTH	Research Item	Deliverables: D1.5, D1.6, D3.3, D3.4, D3.5, D3.6, D4.1, D4.2, D4.5, D4.6, D8.1, D8.2, D8.3	Publishable
CERTH	Software	Building Investment Planning Assistant	Publishable
CERTH	Software	Flex Forecasting	Non-publishable
CERTH	Software	Demand Forecasting	Non-publishable
CERTH	Dataset	(Templates for VERIFY) - to be edited	Non-publishable
CERTH	Software	Digital Building Logbook	Non-publishable
CERTH	Software	Aggregated Demand Portfolio Manager	Non-publishable
CERTH	Software	Visual Analytics Engine	Non-publishable
CERTH	Software	Data Transformation and Quality Assurance	Non-publishable
CERTH	Software	Proactive Demand Planning	Non-publishable
CERTH	Software	Data Transformation and Quality Assurance	Non-publishable
CERTH	Software	Continuous Energy Performance Management	Non-publishable
CERTH	Software	Multi-vector Network Manager	Non-publishable
CERTH	Software	Aggregated Demand Portfolio Manager	Non-publishable
CERTH	Research Item	Research Paper	Publishable
RINA-C	Research Item	Deliverables: D6.4, D7.1, D7.2, D7.3, D7.4, D7.5, D7.6, D7.7, D7.11	Publishable
CEA	Research Item	Deliverables: D5.6, D5.7	Publishable
CIRCE	Software	Middleware layer (interoperability & abstraction services: northbound and southbound APIs)	Non-publishable
CIRCE	Research Item	Deliverable D3.1, D3.2, D3.7, D3.8	Publishable
UBE	Research Item	Deliverables: D8.4, D8.5, D8.6, D8.7	Publishable
UBE	Software	DSM Services Advisor	Non-publishable
UBE	Software	Smart Grid Maintenance	Non-publishable
HAEE	Research Item	Deliverables: D1.1, D1.2, D6.1	Publishable
SOLVUS	Research Item	Deliverable: D1.7, D1.8, D5.1, D5.2	Publishable
SOLVUS	Software	Middleware software platform	Non-publishable
SOLVUS	Software	APIs for integrated platform	Publishable
SOLVUS	Software	Blockchain / smart contract software and APIs	Publishable
R2M	Software	SRI Advisor tool	Publishable
R2M	Research Item	Deliverables: D6.2, D6.3	Publishable
EI-JKU	Research Item	Deliverable D7.10	Publishable

EEE	<i>Research Item</i>	Deliverables: D5.3, D5.4, D5.5	Publishable
TUCN	<i>Research Item</i>	Deliverables: D2.3, D2.4	Publishable
ENTECH	<i>Research Item</i>	Deliverables: D2.1, D2.2, D2.5, D2.6	Publishable
HEDNO	<i>Dataset</i>	Smart metering data for selected MV/LV Substations	Non-publishable
BER	<i>Research Item</i>	<i>P&ID, specs and other layouts of the power-to-hydrogen-to-power system to be demonstrated in Ptolemais demo site</i>	Non-publishable
BER	<i>Software</i>	<i>Tools used to size the power-to-hydrogen-to-power system to be demonstrated in Ptolemais demo site</i>	Non-publishable
ITG	<i>Research Item</i>	Deliverables: D1.3, D1.4, D5.8, D5.9	Publishable
HES-SO	<i>Research Item</i>	Questionnaire targeting owners and tenants who live in the buildings where new technologies will be deployed.	Publishable
HES-SO	<i>Research Item</i>	Deliverables: D7.8, D7.9	Publishable
HES-SO	<i>Dataset</i>	Data collected through the questionnaire.	Non-publishable
HES-SO	<i>Software</i>	Stata and/or R codes to analyse the questionnaire data.	Publishable
HES-SO	<i>Research Item</i>	Research papers presenting the results obtained by the questionnaire data.	Publishable

It is clear from the table above that the partners' contribution of artefacts consists of:

- publishable research items (reports, deliverables, papers)
- non-publishable RIs (evaluation methods, questionnaires)
- non-publishable Datasets (mainly from Demo sites)
- publishable Software
- non-publishable Software with limitations sharing specific data of the project.

Existing data re-used.

EVELIXIA's datasets will be generated/collected during the project's lifespan. Datasets from preceding research will not be used and it is not expected sharing of data with non-EU members.

Expected size of the data

The EVELIXIA project is expected to produce a large number of research products (datasets, publications, new services proposal, dissemination and communication material) but the size of them cannot be estimated yet, mainly due to the complexity of the project.

4 FAIR DATA

The data that will be produced during the EVELIXIA project will be in line with the FAIR principles and will support the re-use of the research data. This will be achieved by making the data:

- Findable: data has an exclusive, permanent ID, located in a searchable resource, and documented with meaningful metadata.
- Accessible: data is readily and freely accessible using common techniques and protocols, metadata is always accessible.
- Interoperable: data is presented in commonly identified standard formats, vocabularies, and languages.
- Re-useable: data has clear licenses, and accurate meaningful metadata compliance to relevant community standards and identifying its content and background.

Making data findable, including provisions for metadata.

This document introduces the data management plan which supports the effective collection and handling of EVELIXIA's data. Storage, processing and sharing (among partners) will occur through a data exchange platform (Microsoft365, MS Teams). Interaction with the public will be accomplished through the official project's website.

Additionally, the data will be archived, for a minimum of 5 years after the end of the project, at the coordinator's repository. Data will be anonymized and will be shared only in relation to publications (deliverables and papers). Consequently, the publication will be the main source of metadata for the shared data. If the publication is not enough for the comprehension of the raw data, an explanatory report will accompany the data.

Discoverability of the data

It is necessary to combine data from the participants' activities in the open calls so that the datasets to be reusable. Considering the FAIR data principles (meta)data should:

- have an exclusive and permanent identifier.
- contain enough metadata for the analysis of the data.
- be archived in a searchable source.

These principles ensure that both the data and their authentication details will be retrievable.

Data identification mechanisms

Documents related to the project will be identified by the project's name and a unique, constant document style. Any versioning should be added to the document's name and title.

Documents produced by project activities (i.e., WP activities, deliverables), will use the corresponding number (WP or deliverable) followed by a short title.

For example:

- **EVELIXIA_D8.4-Project Management Handbook-v0.1.pdf**
- **EVELIXIA_D8.6-Data Management Plan-v0.1.pdf**

Naming agreements.

Documents and datasets produced during the project will be named in a specific and consistent way including information about any versioning. The names should be short and meaningful, to be identified easily but without abbreviations, contractions or acronyms not widely accepted. Language-specific or non-numeric characters should be avoided, a 2-digit number must be added at the end to indicate the version and the date should be present in the form of YYYYMMDD.

Deliverables: **EVELIXIA_[Deliverable Code]-[Deliverable Title]-vA.B** i.e.: **EVELIXIA_D8.4-Project Management Handbook-v1.0** (for submission to the Commission)

For datasets: **WP [Work Package number] D [Demo number_Demo activity number] - [description of the activity]** i.e.: **WP5 D1_1 Collecting baseline sensory data.**

Approach towards search keywords

All the documents produced in relation to the project's activities will follow the templates agreed by the consortium. These templates include a keywords section to make documents findable.

These keywords are related to the topics covered by the EVELIXIA such as:

- Energy efficiency
- Smart Buildings
- Active utility nodes
- Predictive maintenance
- Interoperable platform
- Energy Storage solutions
- Building-to-grid integration solutions

The keywords are intended to identify documents related to the project without difficulty. The keywords will be used throughout the submission process.

Clear versioning of the documents

Official documents of the project considered only the ones versioned by the consortium. All partners will identify the different versions of the documents by using a 2-digit number at the end of the title and the word 'Draft'. When

the document has been reviewed by another partner the original author can replace the 'Draft' with 'Final' and send the document for submission.

Table 4 – Proposed Document History Table

Version	Date	Changes	Author
V1 – first draft	DD.MM.YYYY	Initial Version	Partner's Acronym

The document history included in the document template should be filled in as follows:

Table 5 – Document History table example

Version	Date	Changes	Author
V1 – first draft	DD.MM.YYYY	ToC Introduction	X
V1 – reviews	DD.MM.YYYY	Sections Elaboration	Y
V1 – consolidated version	DD.MM.YYYY	Initial version	X
2nd review	DD.MM.YYYY	Sections Elaboration	Y
V2 – second draft	DD.MM.YYYY	Second draft	X
3rd review	DD.MM.YYYY	Sections Elaboration	Z
Final version	DD.MM.YYYY	Reviewers feedback added	X,Y
Final deliverable submission	DD.MM.YYYY	Ready for submission	X,Y,Z

Standards for metadata creation (if any)

In order to promote the efficient retrieval of information by project partners and external evaluators all the documents will have a cover page including information such as the author(s), the editor(s), the WPs, the dissemination level and the version.



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European Climate, Infrastructure and Environment Executive Agency

Grant agreement no. 101123238



Smart Grid-Efficient Interactive Buildings

Deliverable DX.X

XX Title XX

Figure 1. Template to be used for project documentation metadata overview.

Making data openly accessible.

Data will be made available depending on ethics and participant agreement. Validation and assessment of the project's findings is getting simpler when the data are openly accessible while it assists the use of the data in new ways. Additionally, minimizes any duplication of effort, reduces the environmental impact of research activities, and increases efficiency among experts of the same field.

All the available data will be stored in the coordinator's repository and on EVELIXIA SharePoint. Whoever requests access should contact the Project Coordinator describing their intended use of a dataset. The PC will send a terms and conditions document for them to sign and return. Upon return, the dataset will be released.

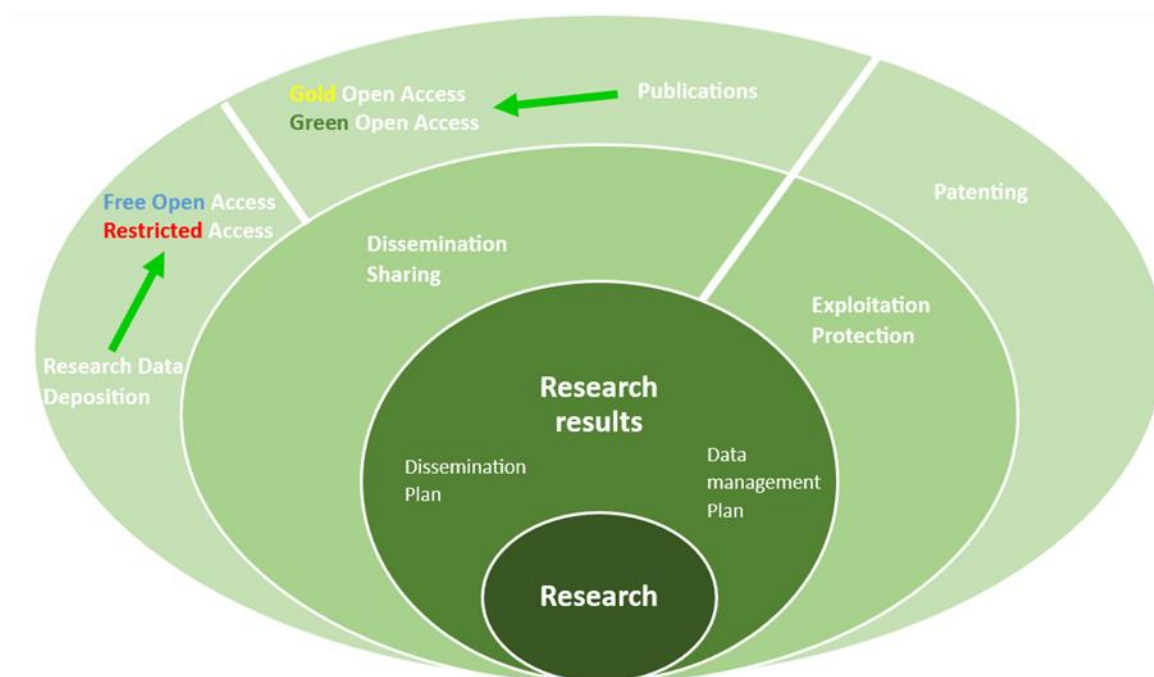


Figure 2 - Open access to scientific publication and research data in the wider context of dissemination and exploitation

Table 6 is highlighting:

- which data are produced and used in the project.
- which data will be made openly available.

Table 6 – Datasets accessibility

	Data Type	Data openly available	Justification
1	Partners' contacts collection	No	Privacy and security concerns.
2	Public security services collection	Yes	
3	Digital security solutions collection	Yes	
4	Quantitative survey data	Yes	
5	Expert interview data	No	Expert interview (recordings, protocols and transcriptions) data will not be published as primary data due to privacy and security concerns. The sample size allows drawing conclusions on the participant, so anonymization is not an option.
6	Focus groups data	No	Focus groups' data will not be published as primary data due to privacy and security concerns. The sample size allows drawing conclusions on the participants, so anonymization is not an option.
7	Workshops data	No	Workshops' data will not be published as primary data due to privacy and security

			concerns. The sample size allows drawing conclusions on the participant, so anonymization is not an option.
8	Validation cycles data	No	Validations' data will not be published due to privacy and security concerns. The sample size allows drawing conclusions on the participant, so anonymization is not an option.

As indicated above, the following data sets will be made openly accessible:
Data type 2 (Public security services collection) 3 (Digital security solutions collection) and 4 (Quantitative survey data).

Table 7 describes the accessibility details of these datasets.

Table 7 – Accessibility details

	Data Type	Accessibility	Availability and software tools required	Information on metadata and additional data information
2	Public security services collection	Public	Searchable database; can be accessed with a modern web browser	No metadata needed; additional information will be provided on the platform
3	Digital security solutions collection	Validated professionals	Searchable database; can be accessed with a modern web browser	No metadata needed; additional information will be provided on the platform
4	Quantitative survey data	Public	Primary data; can be accessed with SPSS or Excel	No metadata needed; additional information will be provided on the platform

No specific software tools will be needed to access any of the data. Anonymized data sets will be saved and stored in word, pdf or excel to assist its exploitation and ensure their long-term accessibility.

All Data will be archived and secured on Microsoft365 platform and on coordinator's account.

Making data interoperable.

The (meta)data will follow a common format, terminology and will be machine readable in order to become interoperable.

Interoperability of data assessment

All the project's data will be archived in an unambiguous user-friendly format considering the actual needs of the specialists/researchers interested in using or developing the data. This will be a responsibility for every partner in the Consortium. The interoperability of the data will be evaluated and updated in future reviews.

Vocabulary use

Terminology will not be an obstacle for data interoperability and/or re-use. Standard vocabulary and language will be used according to the business creation culture and logistics.

Increase data re-use through clarifying licenses.

Due to the sensitive nature of the data, they will be available on EVELIXIA SharePoint(Microsoft365), and their use will be restricted to the research use of the licensee and colleagues on a need-to-know basis. This non-commercial license is renewable after 2 years, data may not be copied or distributed and must be referenced if used in publications. These arrangements will be formalized in a User Access Management license which describes in detail the permitted use of the data.

Data quality assurance process

The project coordinator will be responsible for safeguarding the quality of the datasets. He should be confident that the data follow the FAIR principles and that are constantly updated.

Personal data will be processed following the EU, national and international laws and the “data quality” principles in **Figure 3**.



Figure 3 - Personal Data Quality Principles

Data quality assurance process will be led in accordance with the REGULATION (EU) 2016/679 OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL of 27 April 2016 on the protection of natural persons about the processing of personal data and on the free movement of such data.

Length of time for which the data will remain re-usable.

The Consortium aims to keep the datasets re-usable for as long as it is possible after the project's completion. A period of 5 years has been proposed. However, this time can be extended, subject to the partners' agreement.

5 ALLOCATION OF RESOURCES

Data management responsibilities

The data will be archived in EVELIXIA SharePoint (MS Teams) which will act as the project's repository and will be kept for 5 years after the end of the project. The coordinator (CERth) will manage the repository for EVELIXIA including all data management issues.

The research data will be evaluated and then will be presented through publications in international conferences and open access journals. The costs related to open access will be claimed as part of the Horizon Europe grant.

The WP leaders have the responsibility to archive the data generated from the project's activities and to upload them in the EVELIXIA SharePoint.

The coordinator along with the WP leaders are responsible for updating the current document and to further support the:

- identification of appropriate data-sharing methods
- efficient use of data
- validation of rules for accessibility
- quality of the data
- safe storage

Cost of potential value of long-term preservation

The cost of operating and maintaining the EVELIXIA SharePoint for the length of the project and beyond will not need more funds. Considering the potential value of the data, it has to be noted that the issues covered by the project are linked with the current needs, meaning that will have a direct impact in the near future but it is unknown if the solutions can be applied further.

6 DATA SECURITY

All the data produced from the EVELIXIA project (including personal data) will be securely stored in EVELIXIA data exchange platform (SharePoint-Microsoft365) which has measures in place to protect the data from any change, loss, damage, or destruction. These measures are detailed in the Table 8.

Table 8 – Security measures of SharePoint-Microsoft365

Security Measures	Explanation
Physical protection	Limited access of staff to datacenters. Verified identities with multiple authentication factors (smart cards, biometrics). Security officers, motion sensors, video surveillance and intrusion detection alerts in place.
Network protection	The networks and identities are isolated from the Microsoft corporate network. The service is administrated by a dedicated Active Directory domain, separate domains for test and production, and the production domain is divided into multiple isolated domains for reliability and security.
Content protection	The Data is encrypted using BitLocker encryption at disk level while at the file level using keys.
Application security	Automated and manual analyses help identify possible vulnerabilities. The Microsoft security response center helps assessing incoming vulnerability reports and evaluate mitigations.
Recoverable	Datacenters are geo-distributed within the region and are fault tolerant. Data is copied in minimum two datacenters to mitigate the impact of a natural disaster or service-impacting outage.
Data Transit	When data transferred into the service from users, and between datacenters, it's protected using best-in-class encryption.
Audited and Compliant	Regulatory compliance is fundamental to Microsoft 365. The service complies with regulatory and compliance standards.

7 ETHICAL ASPECTS

The activities of the EVELIXIA project might prompt issues in relation to privacy, data protection, copyright, and ethical aspects. So, it is crucial to discuss ethical and legal compliance issues such as:

- data protection and sharing consent
- safeguarding the identity of participants
- methodologies on handling personal data
- safe and secure storage or transfer of data
- copyright and intellectual property rights (IPR) issues.

The EVELIXIA consortium in order to treat these issues properly examined carefully the legal framework that oversees the activities of the project i.e. a) the European Union ePrivacy Directive 2002/58/EC, b) the Directive 2016/680 of the European Parliament and of the Council of 27 April 2016 on the protection of natural persons with regard to the processing of personal data by competent authorities for the purposes of the prevention, investigation, detection or prosecution of criminal offences or the execution of criminal penalties, and on the free movement of such data thus repealing Council Framework Decision 2008/977/JHA and c) the (EU) Regulation 2016/679 of the European Parliament and of the Council of 27 April 2016 on the protection of natural persons with regard to the processing of personal data and on the free movement of such data thus repealing Directive 95/46/EC.

What is more, the consortium explored the ethical guidelines for research projects in the EU under Horizon Europe which must comply with ethical principles and relevant national and EU legislation i.e., a) HE Framework Programme Regulation 2021/695: Eligible actions and ethical principles (Article 18) and Ethics (Article 19), b) HE Model Grant Agreement: Ethics (Article 14 and Annex 5) c) EU Grants: HE Programme Guide: Guidelines on serious and complex ethics issues (July 2021). d) EU Grants: HE Programme Guide: How to complete your ethics self-assessment (July 2021).

This is the legislation and the Horizon Europe ethical principles that the EVELIXIA consortium will follow in order to protect any person involved in the project whether are a participant or not.

The EVELIXIA project deals with the ethics requirements related to the project's objectives, processes, methodologies, tasks, and results. The ethics requirements basically have to do with the handling of personal data and the protection of the data overall. Therefore, in this deliverable will not be covered requirements that are dealing specifically with the procedures in respect to the data protection.

Prior to the signature of the GA, an ethics check process took place and Ethics Requirements were determined by the EC. All these requirements have been considered by the consortium and general guidelines have been provided on all aspects such as data protection, privacy issues, research participants' safety, etc.

Confidentiality

Every EVELIXIA's partner ought to preserve any data, documents or other material as confidential during the project. Additional details on confidentiality can be found in Article 13 of the Grant Agreement.

Personal Data

This project requires the collection of personal data which will be stored and studied anonymously. The people will be notified about the use of their information, and they will have to provide a written consent to declare their agreement in collection and processing of their data. The personal details of any interviewee related to the project will be protected by anonymization.

Intellectual Property Rights (IPR)

Data access and sharing activities will be thoroughly applied in compliance with the privacy and data collection regulations, as they are practiced nationally, internationally and in the HORIZON Europe rules. Primary data collected through the interviews originated outside of the consortium may be available either to all or specific partners upon authorization of the interviewees. These datasets will be restricted from the public. EVELIXIA's results will become publicly available based on the Access Rights as described in the Consortium Agreement (Article 16).

8 CONCLUSIONS

The present, deliverable represents the EVELIXIA Data Management Plan at M6 and provides a clear view on how the data will be collected and handled during the project while offering information on the significance of FAIR principles. D8.6 also presents a preliminary strategy for the ethics and security of some data generated during the project activities that could come from human participation and related to personal data. It should be noted that the DMP is a document that will be continuously updated by all relevant partners through the duration of EVELIXIA project.