Data Management Plan (D3.3)

Research infrastructures cooperation for energy transition between European and Latin American and the Caribbean countries.

Content

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- Editorial, formatting, and spelling
- Clarification

To request a change to this document, contact the Document Author or Owner.

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Revision	Date	Created by	Short Description of Changes
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Executive Summary

Within the framework of the ENERGYTRAN project, for the Work package 3 leading by the OEI, the Deliverable D3.3 – Data Management Plan (DMP) will be prepared .The objective of the DMP within the framework of the project is to generate and collect data and other outputs in the different work packages, following different specific goals, but mainly with the aim of carrying out investigations - through collecting - and scientifically enriching the research infrastructures and the energy sector as a whole.

1. Data Management Plan

This is a first version of the Data Management Plan (DMP) for ENERGYTRAN, which provides an analysis of the main aspects to be followed by the project's data management policy. The DMP will evolve during the course of the project and will be completed accordingly as research data is collected. The DMP needs to be updated over the course of the project whenever significant changes arise, such as (but not limited to):

· new data
· changes in consortium policies (e.g. new innovation potential, decision to file for a patent).
· changes in consortium composition and external factors (e.g. new consortium members joining or old members leaving).

Consortium partners can fill in the information requested directly in the data management plan as it evolves during an iterative lifecycle throughout the duration of the project. Regarding data protection and privacy, the communication approach, informed consent and relevant regulations on data security, please consult the ethic plan of the ENERGYTRAN project.

1 .1. Data Summary

This project uses both quantitative and qualitative data. Data will be gathered for stakeholder mapping to find appropriate participants for the co-creation workshops, through events and workshops to evaluate the outreach activities and materials produced, and secondary data about the energy transition in Europe and Latin America and the Caribbean regions to identify and analyze the content of our outreach activities and materials. Furthermore, ENERGYTRAN will be using the produced data (written documents, video and audio documents, etc.) to communicate achievements, challenges, and lessons learned based on the deliverables' results, international events (online and final event) and the conclusions of the thematic events. The ENERGYTRAN project will analyze the secondary data about energy transition communication.

The following primary data will be collected in this project: (1) workshop/events transcripts hosted in the portal of the project, (2) interview protocols conducted with specific stakeholders of the project and (3) qualitative and quantitative feedback of participants. Additionally, metadata on methodologies, instruments, procedures, the research goal and its target groups will be collected to be used for the final report of the project as for the policy brief. The collected data of the Policy brief of the project, might be useful to other researchers and policymakers who are working in the field of outreach, energy transition communication and education of scientific cooperation and other research fields.

2. Open Science

Open science is an approach to the scientific process based on open cooperative work, tools and diffusing knowledge.

- **Open science practices**

As mentioned in the Grant Agreement of the ENERGYTRAN project, Open science will be an essential part of the proposed methodology due to the nature way to work of the entities and research infrastructures involved in the consortium. The open science requirement will be accomplished following the recommendation The European Open Science Cloud.

Projects' results and data used during the project will be open access. Open access is an —
Online access to research outputs provided free of charge to the end-user.

In addition, project's implementation will be based on cooperative and sharing knowledge through internships among partners and developing technical tools that allows peer learning and exchange of multidisciplinary knowledge provided by partners from different areas of knowledge (public policy, energy, environment, and social science). As it was mentioned on project's principles description, plus the scientific collaboration and sharing of information, relevant actors such as policy makers, citizens and social society will be involved in the co-creation of innovation solutions related to energy transition.

Considering the UNESCO Recommendations about Open Science as the international framework to make multilingual scientific knowledge openly available, accessible and reusable for everyone, the key pillars of the EULAC FOR ENERGY TRANSITION project will be: open scientific knowledge, open research infrastructures, science communication (explained on communication and dissemination part), open engagement of societal actors and open dialogue with other knowledge systems.

- *Open scientific knowledge*, refers to open access to scientific publications, research data, metadata, open educational resources, software, and source code and hardware that are available in the public domain or under copyright and licensed under an open license that allows access, re-use, repurpose, adaptation and distribution under specific conditions, provided to all actors immediately or as quickly as possible regardless of location, nationality, race, age, gender, income, socio-economic circumstances, career stage, discipline, language, religion, disability, ethnicity or migratory status or any other grounds, and free of charge. It also refers to the possibility of opening research methodologies and evaluation processes.

- *Open research infrastructures*, refer to shared research infrastructures (virtual or physical, including major scientific equipment or sets of instruments, knowledge-based resources such as collections, journals and open access publication platforms, repositories, archives and scientific data, current research information systems, open bibliometrics and scient metrics systems for assessing and analyzing scientific domains, open computational and data manipulation service infrastructures that enable collaborative and multidisciplinary data analysis and digital infrastructures) that are needed to support open science and serve the needs of different communities.

- *Open engagement of societal actors* refers to extended collaboration between scientists and societal actors beyond the scientific community, by opening up practices and tools that are part of the research cycle and by making the scientific process more inclusive and accessible to the broader inquiring society based on new forms of collaboration and work such as citizens' science. Public sector has a leading role to play in the implementation of open science.

- **Open science: open access to scientific publications**

The beneficiaries must ensure open access to peer-reviewed scientific publications relating to their results. In particular, they must ensure that:

- o at the latest at the time of publication, a machine-readable electronic copy of the published version or the final peer-reviewed manuscript accepted for publication, is deposited in a trusted repository for scientific publications.

- o immediate open access is provided to the deposited publication via the repository, under the latest available version of the Creative Commons Attribution International Public License (CC BY) or a license with equivalent rights; for monographs and other long-text formats, the license may exclude commercial uses and derivative works (e.g. CC BY-NC, CC BY-ND) and

- o information is given via the repository about any research output, or any other tools and instruments needed to validate the conclusions of the scientific publication.

Beneficiaries (or authors) must retain sufficient intellectual property rights to comply with the open access requirements.

Metadata of deposited publications must be open under a Creative Common Public Domain Dedication (CC 0) or equivalent, in line with the FAIR principles (in particular machine- actionable) and provide information at least about the following: publication (author(s), title, date of publication, publication venue); Horizon Europe or Euratom funding; grant project name, acronym and number; licensing terms; persistent identifiers for the publication, the authors involved in the action and, if possible, for their organizations and the grant. Where applicable, the metadata must include persistent identifiers for any research output or any other tools and instruments needed to validate the conclusions of the publication.

The publication fees in full open access venues for peer-reviewed scientific publications are eligible for reimbursement.

- *Open science: research data management*

The beneficiaries must manage the digital research data generated in the action ('data') responsibly, in line with the FAIR principles.

Metadata of deposited data must be open under a Creative Common Public Domain Dedication (CC 0) or equivalent (to the extent legitimate interests or constraints are safeguarded), in line with the FAIR principles (in particular machine-actionable) and provide information at least about the following: datasets (description, date of deposit, author(s), venue and embargo); Horizon Europe or Euratom funding; grant project name, acronym and number; licensing terms; persistent identifiers for the dataset, the authors involved in the action, and, if possible, for their organizations and the grant. Where applicable, the metadata must include persistent identifiers for related publications and other research outputs.

- **Open science: additional practices**

Where the call conditions impose additional obligations regarding open science practices, the beneficiaries must also comply with those.

Where the call conditions impose additional obligations regarding the validation of scientific publications, the beneficiaries must provide (digital or physical) access to data or other results needed for validation of the conclusions of scientific publications, to the extent that their legitimate interests or constraints are safeguarded (and unless they already provided the (open) access at publication).

Where the call conditions impose additional open science obligations in case of a public emergency, the beneficiaries must (if requested by the granting authority) immediately deposit any research output in a repository and provide open access to it under a CC BY license, a Public Domain Dedication (CC 0) or equivalent. As an exception, if the access would be against the beneficiaries' legitimate interests, the beneficiaries must grant non- exclusive licenses — under fair and reasonable conditions — to legal entities that need the research output to address the public emergency and commit to rapidly and broadly exploit the resulting products and services at fair and reasonable conditions. This provision applies up to four years after the end of the action.

3. Research data management and management of other research outputs

This project aims to generate and collect data and other outputs in the different work packages, following different specific goals, but mainly with the aim of carrying out investigations - through collecting - and scientifically enriching the research infrastructures and the energy sector as a whole – by generating and disseminating -. Taking this into account, that the objective of these practices is not going to be different from those in this project, the management of data and research outputs is going to respond to FAIR (*findability', 'accessibility', 'interoperability' and 'reusability')* principles, in alignment with the General Data Protection Regulation 2016/679 (GDPR), using practices as the following ones:

- o Findable: outputs will be identified with concrete and unique names, and metadata will be enriched and related to the name. With these characteristics, outputs will be communicated in order to improve their presence in platforms.
- o Accessible: The outputs will be retrievable through their identifiers.
- o Interoperable: The (meta)data will share a language and vocabulary that accomplish FAIR principles.
- o Reusable: (Meta)data will expose its characteristics of provenance, usage license and ethics and security in order that they are susceptible of being replicated or combined with other data.

All (meta) data management will be developed in accordance with the Research Data Alliance recommendations and the practices of ENVRI-FAIR proposals.

3.1 Types and formats

The project will generate secondary data, numerical (quantitative) and/or text (qualitative) data, on:

SECONDARY DATA GENERATE BY THE PROJECT	
Project management and coordination:	reporting data related to project management and consortium meetings; data about the project partners.
Institutional information:	data about the participating institutions.
Researcher information:	data about the researchers from the partner institutions who work at the project.
Metadata:	data describing the context and characteristics of the other data, such as the data format, provenance, quality, and ownership.
Ethics and policy data:	data related to ethics and policy considerations, such as consent forms, institutional management data approvals and data security.

The project will also generate primary from the technical activities of the Project such:

PRIMARY DATA GENERATE BY THE PROJECT	
Inventory of research infrastructure:	data from the research infrastructure from EU and EULAC countries.
Data related with the mobilities:	names of participants, participating institutions and data on the topics covered.
Papers, monographies and technical reports:	Data collected and generated through preparation of Papers, monographies and technical reports.
Workshops, virtual events and e-learning courses:	Data generated through workshops, Workshops, virtual events and e-learning courses, which may include presentations, lectures, discussions, and data collected during activities conducted on digital platforms.

The data generated and collected by the project will be stored in the following formats:

DATA STORED FORMAT	
Text:	Text files contain plain text data and can be easily read and edited using a simple text editor.
CSV:	The CSV stands for "comma-separated values". is commonly used to store tabular data in a plain-text format. The data in this format is widely used in spreadsheet software and can also be easily imported and exported from databases.
Image Formats:	Images can be stored in various formats such as JPEG, PNG, BMP, TIFF, and more.
Audio and Video Formats:	Audio and video can be stored in various formats such as MP3, WAV, AVI, MP4, and more.

A detailed list of all the data that will be generated by WP and the associated tasks and subtasks in the framework of the ENERGYTRAN project is presented below:

Work Package(s), Task (s), Subtask (s), and Deliverable (s)		Description of context for dataset generation
WP1	T1.1 Organizing Mobilities between Research Entities	N/A
	ST 1.1.1 Organizing Mobilities between Research Entities (from LAC to Europe)	The data generated during the process for mobilities is as follow: • "Mobility offers from host entities.xlsx" where the EU institutions prepared the mobility offer according to their capabilities. • "LAC Mobility Request.xlsx" where the LAC institutions propose the researchers. "EULAC Final Mobility list.xlsx" Once candidates have been approved by EU institutions and the list is agreed.
	ST 1.1.2 Signing of a Memorandum of Understanding between the parties	The formal agreement between the EU and LAC institutions will be formalized through a "Memorandum of Understanding" or a similar document. *The final format is yet to be confirmed.*
	ST 1.1.3 Organizing Mobilities between Research Entities (from Europe to LAC)	To be defined
	ST 1.1.4 Mobilities from Europe to LAC	To be defined
	D1.2 Monitoring Report for Technology Mobilities I	Creating a dataset for organizing mobility between research entities from Europe to LAC requires an approach that considers the strategic goals, stakeholders, logistical details, challenges, and the broader policy context. The dataset should enable stakeholders to identify opportunities, manage logistics, and measure the impact of mobility programs effectively, fostering stronger and more sustainable research collaborations. The report entails collecting, organizing, and structuring data on the objectives, characteristics, and key results of the mobilities. Proposed Dataset Structure in the monitoring report: -Institution name (Name of the university or research center)

WP1		-Country (Location of the institution) -Research Focus (Primary areas of research and expertise). -Mobility program (Name and description of the mobility program) -Historical Mobility Data (Number of participants, duration, and fields of study) -Partnerships (Existing/developing collaborative agreements and networks) -Visa and travel Information (Requirements and guidelines for researchers) -Cultural and language support (resources available to assist with cultural and language adaptation) -Impact metrics (Outcomes of the mobility, including publications and others).
	D1.3 Monitoring Report for Technologies Mobilities II	Creating a dataset for organizing mobility between research entities from Europe to LAC requires a comprehensive approach that considers the strategic goals, stakeholders, logistical details, challenges, and the broader policy context. The dataset should enable stakeholders to identify opportunities, manage logistics, and measure the impact of mobility programs effectively, fostering stronger and more sustainable research collaborations. The report entails collecting, organizing, and structuring data on the objectives, characteristics, and key results of the mobilities. Proposed Dataset Structure in the monitoring report: -Institution name (Name of the university or research center) -Country (Location of the institution) -Research Focus (Primary areas of research and expertise). -Mobility program (Name and description of the mobility program) -Historical Mobility Data (Number of participants, duration, and fields of study) -Partnerships (Existing/developing collaborative agreements and networks) -Visa and travel Information (Requirements and guidelines for researchers) -Cultural and language support (resources available to assist with cultural and language adaptation) -Impact metrics (Outcomes of the mobility, including publications and others).
	T1.2 Providing Technical Assistance for Capacity Building	To be defined
	ST1.2.1 Preliminary analysis of potential uses of CST for native populations communities in LAC and rural areas	To be defined

WP1	ST 1.2.2 Dialogue with local communities to confirm that the bases are correct. Also analyze synergies between different locations	To be defined
	ST 1.2.3 Develop training and dissemination sessions with native populations in LAC and rural area. (paper??)	To be defined
	D - No deliverable assigned to this task	
	ST 1.3 Developing Inventory of Research Infrastructures	N/A
	ST 1.3.1 Develop Inventory of Research Infrastructures LAC	To be defined
	ST 1.3.2 Develop Inventory of Research Infrastructures EU	To be defined
	ST 1.3.3 Agree with and confirm the expectations with the project (including interaction with tool developed in WP4&5)	To be defined
	D1.1 Inventory of RI for Energy Transition	To be defined
WP2	**D.2.2 Monograph on Research Infrastructures for Green Hydrogen and Lithium**	To be defined
	2.1 Joint Assessment on Solar Thermal Energy	N/A
	2.1.1 Define the topic of the paper (CSP, CST, focused on industry, etc).	List of interesting research topics identified by the consortium
	2.2.2 Define the authors	Establishment of research groups for the development of the research topics identified in the previous point, including institutions not belonging to the consortium
	2.2.3 Develop paper	All generated data will be disseminated in the deliverable D2.1

WP2	**D2.1 Paper about Solar Thermal Energy Assessment**	This section corresponds to the research articles that have been generated, as well as any additional material necessary for proper open access dissemination (metadata, software, etc.)
	2.2 Organization of Virtual Thematic Event	N/A
	2.2.1 Develop VTE content	No data to be generated here
	2.2.2 Agree VTE content	No data to be generated here
	2.2.3 Finding speakers	No data to be generated here
	2.2.4 Date VTE	No data to be generated here
	2.2.4 Deliverable development	No data to be generated here
	D2.5 Conclusions on the Virtual Thematic Event	The deliverable will be a report, containing the following information (subject to change): • Event description, including panels, topics, speakers, etc. • A comprehensive description of the topics discussed in each panel, compared with the themes identified in the panel's content definition. A description of conclusions regarding public policies, best practices, and recommendations, which are the fundamental outcomes of the virtual thematic event. These conclusions will be based on the contributions of expert speakers who participated in the discussions.
	2.3 Lithium Extraction Report	To be defined
	2.3.1 subtasks need to be developed, add as many subtasks as necessary	To be defined

WP	Deliverable	Description
WP2	**D2.3 Report about Lithium Extraction, Generate synergies with CSIC**	To be defined
	2.4 Online-Presential International Workshop	To be defined
	2.4.1 Agree OIW content and partners participation, as well as the date	To be defined
	2.4.2 Finding speakers and organizing the event	To be defined
	2.4.3 Event management	To be defined
	D2.4 Conclusions on the Online International Workshop	To be defined
WP3	**D3.1 – Project webpage**	Provide information in terms of Energy transition, news site, connects users for communication and interaction, displays work, such as a multimedia content (images, videos) portfolio of the project, offers services like booking, consulting regarding the deliverables, documents and information of the project.
	D3.2 – Ethic Plan	Ensure compliance and adherence to legal and regulatory requirements, foster a culture of honesty, transparency, and accountability and encourage practices that contribute to social and environmental well-being, based on the project-specific ethical compliance considerations unique to the EULAC -Energytran project. Impact Analysis: Assessment of the potential impact of identified risks on stakeholders and actions in the framework of the project.
	D3.3 – Data Management Plan	Creating a dataset for a Data Management Plan (DMP) involves gathering, organizing, and structuring data, that will guide the management of data throughout the lifecycle activities and actions of the ENERGYTRAN project. The DMP ensures data handled consistently, securely, and efficiently, facilitating accessibility, sharing, and long-term preservation, based on the characteristic of the project.

WP3	**D3.4 – Gender equality plan**	The Gender Equality Plan (GEP) involves gathering, organizing, and analyzing data to develop strategies that promote gender equality within the ENERGYTRAN project, based on the exchange of the consortium partners also based on the policies and actions applicable across project.
	D3.5 – Plan for dissemination and exploitation	The Plan for Dissemination and Exploitation involves gathering, organizing, and structuring data that supports the effective dissemination and use of project results. This plan is based on the outcomes of the project to reach appropriate audiences to maximize impact and value.
	D3.6 – Policy brief I	The Policy brief involves gathering, organizing, and analyzing data that supports the formulation and communication of concise, evidence-based recommendations to policymakers, in order to inform decision-making processes, advocate for specific actions, and facilitate the understanding of complex issues, based on the evidence-based information of the ENERGYTRAN project.
	D3.7 – Memorandums of Understanding	The Memorandum of Understanding (MoU) involves gathering, organizing, and structuring data that supports the formulation of agreements between parties, outlining the terms and details of the mutual agreement, setting the groundwork for collaboration, partnership, and the coordination of efforts, based on the goals and objectives of the project.
	D3.8 – Updated plan for dissemination and exploitation	The Plan for Dissemination and Exploitation involves gathering, organizing, and structuring data that supports the effective dissemination and use of project results. This plan is based on the outcomes of the project and in the evolution of the progress status of the project's actions and activities to reach appropriate audiences to maximize impact and value.
	D3.9 – Policy brief II	The Policy brief involves gathering, organizing, and analysing data that supports the formulation and communication of concise, evidence-based recommendations to policymakers, in order to inform decision-making processes, advocate for specific actions, and facilitate the understanding of complex issues, based on the evidence-based information of the ENERGYTRAN project.
	D3.10 – Project Management Handbook	The Project Management Handbook (PMH) involves collecting, organizing, and structuring information that supports the effective planning, execution, monitoring, and closing of the Project . the PMH, provides standardized guidelines, processes, and best practices to ensure the project success based on its specificities.
	D3.11 – Quality Assurance Plan	The Quality Assurance (QA) Plan involves gathering, organizing, and structuring data that supports the development and implementation of processes to ensure the quality and reliability of the actions of the project. The QA Plan outlines the procedures, standards, and responsibilities necessary to achieve quality objectives based on comprehensive documentation of the quality management system adapted to the ENERGYTRAN project.

WP4	T4.1.1. Organizing Mobilities between Research Entities (from LAC to Europe and from Europe to LAC)	The mobilities between RI involve gathering, organizing, and structuring data that supports the planning, organization and execution of these activities, including information on candidate profiles and their institutions, the objectives of the mobilities, as well as the date and location of the activity.
	T4.1.2. MoUs between the EULAC RIs for the mobilities	The Memorandum of Understanding (MoU) involves gathering, organizing, and structuring data that supports the formulation of agreements between parties, outlining the terms and details of the mutual agreement, setting the groundwork for collaboration, partnership, and the coordination of efforts, based on the goals and objectives of the mobility.
	T4.1.3. Monitoring Report for Mobilities I (D4.2)	This report entails collecting, organizing, and structuring data on the objectives, characteristics, and key results of the mobilities.
	D4.1. Mobilities	This deliverable entails collecting, organizing, and structuring data on the objectives, characteristics, and key results of the mobilities organized under WP4.
	T4.2.1 Content identification	This task involves collecting, organizing, and structuring data to identify the content material for the e-learning course.
	T4.2.2 Identification of potential experts and contributions	This task involves collecting, organizing, and structuring data to identify the potential experts and their contributions to the e-learning course.
	T4.2.3 Identification of partners' contributions	This task involves collecting, organizing, and structuring data to identify the contributions of project partners to the e-learning course.
	T4.2.4 Development of course material (D4.1)	This deliverable entails collecting, organizing, and structuring data on the materials that will be created and/or re-used for the e-learning course that will be organized in the ENERGYTRAN project.
	T4.2.5 Course logistics	This task involves gathering, organizing, and structuring data on the logistical aspects of the e-learning course, including the venue, dates, duration, format, registration, technical requirements, contact persons, etc.

WP4	T4.2.6 Communication and Dissemination	This task involves gathering, organizing, and structuring data to support the communication and dissemination of the e-learning course to key target audiences
	T4.2.7 Course registration	The course registration form involves gathering, organizing, and structuring data to support the registration of participants in the e-learning course, whether they attend in person or online.
	T4.2.8 Course execution	This task encompasses collecting, organizing, and structuring data on course attendees, satisfaction surveys, and materials for disseminating the course results.
	D 4.2 E-learning course on Open Science	
WP5	T 5.1.1 Presentation of My.lifewatch Platform (Software)	This task does not generate/re-use data.
	T 5.1.2 Identification of partner's contributions	This task involves collecting, organizing, and structuring data to identify the contributions of project partners to the e-learning course.
	T 5.1.3 Identification of indicators	This task comprises collecting, organizing, and structuring data concerning the indicators deemed relevant for integration into the software by the energy transition community.
	T 5.1.4 Workflow design tutorials	The creation of workflow tutorials involves gathering, organizing, and structuring data to assist in the scientific and technical design and implementation of the workflows intended for integration into My.lifewatch Platform. These tutorials include information on the objectives, background and scientific questions to be responded with the workflows, as well as the technical requirements for their integration and reuse in the Platform.
	T 5.1.5 Identification or modeling of the various workflow operations	This task entails collecting, organizing, and structuring data, specifically pieces of code, for each step of the workflows to analyze each indicator.
	T 5.1.6 Encapsulation of each workflow component (wrappers)	This task entails collecting, organizing, and structuring data, specifically pieces of code, to create the wrappers corresponding to the different steps of the workflows to analyse the selected indicators.

WP5	T 5.1.7 Workflow integration in the Platform and validation	This task entails collecting, organizing, and structuring data to support the integration of the workflows and wrappers into My.Lifewatch Platform, including the publication of each component in the LifeWatch ERIC metadata catalog.
	T 5.1.8 Final version of the Software (D5.1)	This deliverable entails collecting, organizing, and structuring data to support the development of the software, already specified in the previous tasks.
	T 5.1.9 Dissemination and community engagement	This task involves gathering, organizing, and structuring data to support the communication, dissemination and engagement of the final version of the workflows.
	T 5.1.10 Task periodic meeting	This task involves gathering, organizing, and structuring data to support the organization of the WP periodic meetings, including the agenda, the participants, and the main meeting notes.
	D 5.1. Software for the SDG achievement on research	
	T 5.2.1. Implementation of the Software (D5.2)	This task does not generate/re-use data.
	T 5.2.2 Administration of the community in the virtual environment	This task does not generate/re-use data.
	T 5.2.3 Stakeholder's mapping	The stakeholder mapping process entails gathering, arranging, and organizing data concerning potential users who will be involved in utilizing the virtual environment.
	T 5.1.4 Dissemination and community engagement	This task involves gathering, organizing, and structuring data to support the communication, dissemination and engagement of the final virtual environment to exchange know-how in the context of the Energytran project.
	T 5.2.5 Task periodic meetings	This task involves gathering, organizing, and structuring data to support the organization of the WP periodic meetings, including the agenda, the participants, and the main meeting notes.

WP	Task / Deliverable	Description
WP5	**D 5.2 Virtual environment to exchange know-how**	
	Task 5.3.1 Develop the virtual event agenda	This task does not generate/re-use data.
	Task 5.3.2. Agreement on the agenda	This task does not generate/re-use data.
	Task 5.3.3. Identification of speakers	This task involves collecting, organizing, and structuring data to identify the potential speakers contributing to the virtual thematic event.
	Task 5.3.4. Dissemination and communication of the event	This task involves gathering, organizing, and structuring data to support the communication and dissemination of the virtual thematic event.
	Task 5.3.5. Organization of the event	The course registration form involves gathering, organizing, and structuring data to support the registration of participants in the virtual thematic event
	D 5.3 Virtual thematic event *Conclusions of virtual thematic event WP5	
WP6	Task 6.1. Monitoring report for social impact mobilities I	The mobilities, oriented to field research in the selected case studies, will generate transcripts of interviews and field notes.
	Task 6.2. Monitoring report for social impact mobilities II	The mobilities, oriented to field research in the selected case studies, will generate transcripts of interviews and field notes.
	D6. Monitoring report for social impact mobilities	The mobilities, oriented to field research in the selected case studies, will generate transcripts of interviews and field notes.
WP7	Task 7.1. Ethnographic research about the social impacts of energy transition *Conclusions of virtual thematic event WP7	The ethnographic research involves an extensive academic monograph that will include a general introduction to the social study of the energy transition, an overview of the situation in Ibero-America, the compilation of the case studies investigated during the mobilities and general conclusions. At the same time, a summary report will be prepared for policy makers. The ethnographic research will be generated from interview transcripts, field notes (produced during the mobilities) and bibliographic study notes. The conclusions of the thematic event will be structured in a synthesis document that will form part of the theoretical framework of the ethnographic research.
	D7. Ethnographic research	

3.2 FAIR principles

This consortium is composed by eleven entities from Europe and Latin America and the Caribbean. It is characterized by the disciplinary and interdisciplinary knowledge and by the complementarity of its partners. When forming the consortium, minimum standards of action have been assured. Among them, the agreement to act with open science practices, as well as the respect to FAIR principles in (meta)data management and practices concerning ethic, security, as the "do not significant harm" principle and the gender policy consideration and accomplishment. Besides, it has been also agreed that the exploitation of the results of the proposal is going to be related to the public sector; therefore, although there is not going to be industrial/commercial involvement in the project, civil society is represented by some of the LAC entities and public government through the project's leader OEI that is composed by LAC, Spanish, Portuguese, and Andorra governments. In fact, both, society, and public government will be the main users of the project's effect.

3.3. FAIR data

3.3.1. Making data findable, including provisions for metadata

The ENERGYTRAN project will make its produced data available also on platforms such as the project intranet platform that will be hosted on the Project website: www.energytran.oei.int , as well as from three particular deliverables of the project: **D.4.1 E-learning course on Open Science; D5. 1 – Software for achieving the SDGs in research** (to generate traceability chains -blockchain, mobilities traceability, etc.) **and D5.2 – Development of the climate change and diversity research platform for the energy transition** (the platform will be open Access, with the possibility to share data, resources, etc.).

The mentioned deliverables belong respectively to work packages 4 and 5, both under the execution of an European Research Infrastructure Consortium (ERIC), working in specialized knowledge, open and FAIR data, semantic resources and tools, BIG DATA analysis, computational power, web services and training, among others, in topics as energy supply and climate change.

The project will try to optimize the possibilities for maintain and re-use data in the framework of the life of the project but also as a way to capitalize information for reporting, recommendation and learning phase, as well to be used for European and LAC researchers and policy makers. All the quantitative and qualitative research in the project, included metadata produced will be available on the platform of the project. Metadata will describe instruments used, methodologies employed and goals and target groups of the research.

3.3.2. Making data openly accessible

All data produced in the ENERGYTRAN project will be openly accessible. Data sets and metadata (anonymized) will also be openly accessible without login. The data will be made accessible on a repository accessible on the ENERGYTRAN platform and on open data platforms such as mentioned above regarding the deliverables: *D.4.1, D5. 1 and D5.2.* These kinds of repositories will allow researchers to store and publish both research outputs and data, while providing tools to link them. To access ENERGYTRAN website data and materials created, special software tools or methodologies will not be needed. All data produced and the associated anonymized metadata, documentation and code could be stored on the ENERGYTRAN repository and in the open data platform Zenodo, as platform recognized by the European Commission for Horizon projects, which will support open access. The repository will be hosted by OEI website domain who will guarantee its accessibility.

The project coordination team will create an account in Zenodo and will upload all information that may go public. When uploading documents to Zenodo, a persistent identifier (DOI) is automatically generated, which serves as a unique and permanent reference.

3.3.3. Making data interoperable

To allow data exchange and re-use between researcher, institutions, organizations, countries, etc. the ENERGYTRAN project will assure the use of interoperable formats like those supported by Microsoft Excel and Microsoft Word, as described in subsection 3.3 (Types and format). Moreover, standard vocabularies for all data types will be used to allow inter-disciplinary interoperability.

Additionally, all uploaded data to Zenodo is available for harvesting by other repositories using the OAI-PMH protocol, supported by Zenodo.

3.3.4. Increase data re-use (through clarifying licenses)

All data produced in the ENERGYTRAN project will be open access and licensed under the creative commons license. The data produced and used in the project will be useable by third parties, before and after the end of the project. This will be guaranteed by providing the data on platforms such as www.energytran.oei.int and from the deliverables: *D.4.1, D5. 1 and D5.2.* of the project. The time limit of the data being re-usable will be interlinked with the ENERGYTRAN platform.

4. Allocation of resources

The data will be openly accessible as far as there are no extra costs. Open access publications must be covered by the partner organizations themselves, as the ENERGYTRAN project cannot allocate resources for this purpose. Besides, the coordination team and Work Package leaders are ultimately responsible for the data management of their tasks. Decisions on what data will be kept and for how long will be taken by the General Assembly.

After completion of the project, data preservation will be ensured for a minimum period of 5 years, in accordance with legal obligations and good data management practices. This duration can be extended if necessary for audits, investigations or litigation. Data will be preserved in a secure and accessible manner, with appropriate measures implemented to protect against unauthorized access or loss. This will use existing resources in the partner institutions.

5.Data security

According to the general data protection regulation each partner is responsible for data security of the data they gather within their organization. However, all partners guarantee to meet the European data protection standards within their organizations[1].

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[1] https://commission.europa.eu/law/law-topic/data-protection/data-protection-eu_en

6.Data Protection

In the section 2 Rules for carrying out the action of the Grant Agreement, it is mentioned the Article 15, regarding the Data Protection.

6.1. Data processing by the granting authority

Any personal data under the Agreement will be processed under the responsibility of the data controller of the granting authority in accordance with and for the purposes set out in the Portal Privacy Statement. For grants where the granting authority is the European Commission, an EU regulatory or executive agency, joint undertaking or other EU body, the processing will be subject to Regulation 2018/1725[2].

6.2. Data processing by the beneficiaries[3]

The beneficiaries must process personal data under the Agreement in compliance with the applicable EU, international and national law on data protection (in particular, Regulation 2016/67914).

They must ensure that personal data is:

- o processed lawfully, fairly and in a transparent manner in relation to the data subjects;
- o collected for specified, explicit and legitimate purposes and not further processed in a manner that is incompatible with those purposes;
- o adequate, relevant and limited to what is necessary in relation to the purposes for which they are processed;
- o accurate and, where necessary, kept up to date;
- o kept in a form which permits identification of data subjects for no longer than is necessary for the purposes for which the data is processed and
- o processed in a manner that ensures appropriate security of the data.

The beneficiaries may grant their personnel access to personal data only if it is strictly necessary for implementing, managing and monitoring the Agreement. The beneficiaries must ensure that the personnel is under a confidentiality obligation. The beneficiaries must inform the persons whose data are transferred to the granting authority and provide them with the Portal Privacy Statement.[4]

7. Resources

ENERGYTRAN Grant Agreement.
ENERGYTRAN Consortium Agreement.

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[2] Regulation (EU) 2018/1725 of the European Parliament and of the Council of 23 October 2018 on the protection of natural persons with regard to 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 (OJ L 295, 21.11.2018, p. 39).

[3] See Annexe I: Specific Data Procedures for the ENERGYTRAN project.

Annexe I

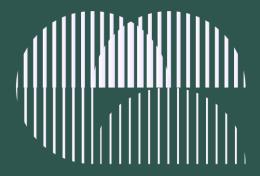## Specific Data Procedures for the ENERGYTRAN project:

The Data procedures give instructions and details of the processes to follow concerning data.

In this regard, the ENERGYTRAN project has identified three types of data procedures as follow:

- **Data Collection, Acquisition, and Documentation**: This procedure outlines how data will be collected, acquired, and documented during project research activities. It includes protocols for data collection methodologies, instrumentation, and metadata documentation to facilitate data interpretation and reuse.

- **Data Storage, Management, and Security**: This procedure delineates how data will be stored, managed, and secured throughout the project lifecycle. It encompasses strategies for data storage infrastructure, version control, backup procedures, and encryption methods to protect against unauthorized access, loss, or corruption.

- **Data Access, Sharing, and Distribution**: Here, protocols and policies are established to facilitate data access, sharing, and distribution among project collaborators and external stakeholders. It covers mechanisms for data sharing platforms, access controls, and data dissemination strategies to promote transparency and collaboration while safeguarding intellectual property and sensitive information.

Applying this procedure to the different Work-package of the ENERGYTRAN project, we can identify the following steps:

- o **Data Collection, Acquisition, and Documentation**:

  - WP1&2 (the most representative will be the tasks 1.3, 2.1,2.3).
    For this WP, an identification of data generated in each of the tasks (data, metadata, formats, etc) will be carried out.
  - WP3 (Coordination)
  - WP4&5: a large part of the data identified in the ENERGYTRAN project will come from these WPs.
  - WP6&7: although most of the data to be collected by these work packages will be qualitative, the application of data will also be considered.

- o **Data Storage, Management, and Security:** the OEI as Project coordinator will be in charge of uploading data of the project, taking also into account the review processing of data collection of the others consortium members to guarantee that the process is carried out correctly. This step is about defining the detail of this procedure.

- o **Data Access, Sharing, and Distribution**: all data produced, and the associated anonymized metadata, documentation and code could be stored on the ENERGYTRAN repository and in the open data platform Zenodo, as platform recognized by the European Commission for Horizon projects, which will support open access. For example, regarding the mobilities of the project, it is possible that the data generated by the mobilities concerning personal data (name, surname...etc) will be stored in Zenodo but in a restricted way.

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