



**TRUEDEM: Trust in European Democracies
2023-2025
European Commission Grant No 101095237**

Deliverable D12.2. Data Management Plan (DMP) V2.0

Due date: 31 Dec 2023 (V2.0)

Type: DMP (Data Management Plan)

Dissemination Level: PUBLIC

Work Package: WP12 Project Management

Lead Beneficiary: ICSR-AT

**Contributing
Beneficiaries:** All partners

Authors: Prof. Christian Haerpfer, Dr. Kseniya Kizilova,
Dr. Alexander Chvorostov

Purpose and scope of the deliverable:

The objective of D12.2 (the Data Management Plan) is to describe what data the TRUEDEM project will collect and proceed, whether and how it will be exploited or made accessible for verification and re-use and how it will be curated and preserved after the end of the project.

Versions history and updates schedule

Number	Date	Author(s)	Partner	Comments, input
V0.1	15 May 2023	Prof. Christian Haerpfer, Dr. Alexander Chvorostov	ICSR-AT	First outline and incomplete draft
V0.2	06 June 2023	Dr. Kseniya Kizilova	ICSR-AT	Additions for sections 1, 2, 3
V0.3	08 June 2023	Prof. Christian Haerpfer, Dr. Alexander Chvorostov	ICSR-AT	Additions for sections 4, 5, 6
V0.4	12 June 2023	Dr. Kseniya Kizilova	ICSR-AT	Additions for sections 2, 4, 5, 6
V0.5	26 June 2023	Joint discussion at the Executive Committee Meeting	All partners	Minor amendments and remarks
V1.0	30 June 2023	Prof. Christian Haerpfer, Dr. Kseniya Kizilova, Dr. Alexander Chvorostov	ICSR-AT	Submission
V1.1	5 December 2023	Prof. Christian Haerpfer, Dr. Kseniya Kizilova, Dr. Alexander Chvorostov	ICSR-AT	Amendments to sections 1, 2, 3, 4
V1.2	25 December 2023	Inputs and review by all partners	All partners	Further minor amendments and remarks
V2.0	31 December 2023	Prof. Christian Haerpfer, Dr. Kseniya Kizilova, Dr. Alexander Chvorostov	ICSR-AT	Submission
V3.0				
V4.0				

Contents

Introduction	5
Project summary	5
Objectives TRUEDEM Data Management Plan (DMP) and its overview	5
1 Research data and non-data outputs in TRUEDEM	6
1.1 Principal types of project research outputs and Open Science practice	6
1.1.1 Research data and non-data research outputs	6
1.1.2 Overview of the Research Data Management and Open Science Practices	7
1.1.3 Making research data FAIR: Findable, Accessible, Interoperable and Re-usable	9
1.2 Project’s steering bodies responsible for data management and administration.....	9
1.3 TRUEDEM research data: definitions and overview.....	10
1.3.1 Working definitions	10
1.3.2 Data formats.....	11
1.3.3 Software packages in TRUEDEM: TRINT, JDSurvey and EMDESK	13
1.4 Clusters of data in TRUEDEM	16
1.4.1 Pre-existing raw and processed research data (data cluster A).....	26
1.4.2 Newly processed and agglomerated research data (data cluster B).....	27
1.4.3 Data from quantitative online survey (WP8) (data cluster C)	28
1.4.4 Data from expert interviews with politicians and policymakers (WP8) (data cluster C).....	29
1.4.5 Data from consultations with CSO leaders (WP8) (data cluster C)	30
1.4.6 Data from focus-group discussions (FGD) with citizens (WP8) (data cluster C).....	31
1.4.7 Data from policy workshops (WP10) (data cluster C)	32
1.5 Non-data research outputs.....	33
2 FAIR data policy in TRUEDEM project	35
2.1 Making data findable, including provisions for metadata.....	35
2.1.1 General remarks	35
2.1.2 Naming conventions	35
2.1.3 Persistent Identifier	37
2.1.4 Metadata.....	37
2.1.5 Other data documentation.....	38
2.1.6 Keywords	38
2.2 Making data accessible	39
2.2.1 Repository and open access publications.....	39
2.2.2 Open data access and embargo	40
2.2.3 Data access protocols.....	42
2.2.4 Applicable software allowing accessibility of data	42
2.3 Making data interoperable.....	43
2.4 Increase data re-use	43
3 Allocation of resources	44
3.1 Costs related to data storage, maintenance, transfers, and dissemination.....	44
3.2 Data management policies and procedures in TRUEDEM project	45
3.2.1 Data management overview.....	45

3.2.2	Data management bodies	45
3.2.3	Data management cycle	47
4	Issues of data security.....	52
4.1	General notes on data security	52
4.2	Sensitive data: Secured storage, archiving and transfer.....	52
4.3	The issue of data transfer to the EU from non-EU countries and vice-versa (cases of Ukraine and Canada).....	53
4.3.1	General provisions	53
4.3.2	Project data exchange with Ukraine	53
4.3.3	Project data exchange with Canada	54
5	Ethics of data management in TRUEDEM.....	55
5.1	Overview of ethics aspects.....	55
5.2	Legal aspects of project data sharing	56
5.3	Issues of informed consent.....	56
6	Continuous and periodic reporting of project data.....	56
6.1	Continuous reporting on Horizon Europe portal.....	56
6.2	Periodic and Final Reporting	58
6.3	TRUEDEM data description form	59
ANNEXES.....		60
	Grant Agreement: Data Protection and IPR issues.....	60
	ANNEX 5 to the Grant Agreement	62
	Relevant provisions from GDPR.....	63

Introduction

Project summary

TRUEDEM is a 3-year multinational research project funded by the Horizon program of the European Commission with several core objectives. TRUEDEM aims to design and implement a complex research effort to collect comprehensive evidence on the perceptions of trust and judgments of trustworthiness in a range of European states. The project will create a robust and comprehensive knowledge base on long-term dynamics and predictors of trust in political institutions of representative democracy (parties, executives, parliaments, judiciary etc.) in the EU. TRUEDEM will examine the role of new patterns of electoral behaviour, impact of socioeconomic transformations, the erosion of old and emergence of new political cleavages for the inclusiveness, representativity and legitimacy in European democracies, and political trust. TRUEDEM will identify strategies to address the demands and needs of citizens expressed via both electoral and non-electoral forms of political participation as means to enhance active engagement and inclusion and thus booster inclusive and responsive decision-making and governance in Europe. TRUEDEM will distinguish clusters of values that can hinder or foster pro-democratic values and attitudes and thus contribute to the barriers and opportunities to re-invigorating and enhancing representative democratic systems. Finally, TRUEDEM will develop a comprehensive and transparent toolbox of policy interventions including recommendations, toolkits and methodologies for enhancing trust in political institutions, boosting transparency inclusiveness of representative systems. TRUEDEM is coordinated in Austria with partners in Czechia, France, Germany, Greece, Italy, Poland, Romania, Slovakia, Slovenia, Sweden, and Ukraine. The three-year program runs from January 2023 to December 2025.

Objectives TRUEDEM Data Management Plan (DMP) and its overview

This document is produced as a part of work package 12 (Project Management), led by the Project Coordinator ICSR-AT. In accordance with the Annex 1 (part A) to the Grant Agreement, deliverable D12.2 “Data Management Plan” (further referred to as “DMP”).

The objective of the document is to report the steps for data management, which are to be followed during the execution of TRUEDEM project. The target of the document is twofold: first, to report the detailed data handling and preservation activities, and second, to define the detailed data management plan towards the dissemination of project outcomes. This document provides the most recent information about the data types used and generated by the project consortium partners including focus on the means of sharing the data captured by the TRUEDEM framework and further specifies the methods of data storage. In this way, the DMP provides a general overview of the complete data management life cycle. The plan for data management includes aspects such as:

- (a) data safety procedures which are compliant with privacy by design and protection of confidentiality (including GDPR);
- (b) procedures for quantitative and qualitative data collection, storage, protection, retention, transfer if any, destruction or reuse;
- (c) the metadata documentation, the expected schedule for data access, data limitations for secondary use, data repository/sharing/archiving;
- (d) procedures related to the data employed for secondary data analysis;

- (e) choice of data, sharing and ownership of data, choice of software;
- (f) use of methods when observing participants;
- (g) roles and responsibilities of project staff in the management and retention of data.

This DMP therefore provides a framework for good data management in the TRUEDEM project and describes the data management life cycle for the data to be collected, processed and/or generated by the project. These rules are detailed in the following chapters:

- a) Overview of the types of data and research outputs produced within TRUEDEM project;
- b) Principles of FAIR data policy (making project data Findable, Accessible, Interoperable and Reusable);
- c) Rules for administration and management of non-data research outputs (NDRO);
- d) Data management policy, procedures and allocated resources;
- e) Issues of data security;
- f) Issues related to ethics;
- g) Other issues of data management.

An Annex is added that quotes the related provisions from the Grant Agreement with regard to the data management. It is the responsibility of each TRUEDEM partner to notify the Coordinator of changes in the data they are collecting, using or producing throughout the project life cycle.

As this report was first generated at the early stage of the project execution (month 6), it is considered as a living document which is regularly updated during the project lifetime. DMP V2.0 has been approved by the TRUEDEM Consortium in M12 (end of year 1) and features further clarifications and specifications concerning the primary qualitative data outputs to be produced in year 2; data security measures (anonymization); and data sharing.

1 Research data and non-data outputs in TRUEDEM

1.1 Principal types of project research outputs and Open Science practice

1.1.1 Research data and non-data research outputs

As a social sciences research project, TRUEDEM pursues research objectives described in the section “Project Summary” (see above) and generates two principal types of RESEARCH OUTPUTS

(i) research data outputs that stand for numeric and non-numeric annotated data collections, accompanied by the related metadata and documentation, and

(ii) non-data research outputs, in textual, graphic or other formats, such as reports, papers, research and journalist publications, web- and video contents, etc.

This document (DMP) addresses research outputs of the first type, while research outputs of the second type are described mainly in TRUEDEM Dissemination, Communication and Dissemination Plan (D11.1).

The main research data outputs produced in TRUEDEM project are described in Section 1.4 and include:

- Pre-existing raw and processed research data and datasets.
- Newly processed and agglomerated secondary research data and datasets.
- Newly collected primary research data and datasets (qualitative from focus group discussions and expert interviews, and quantitative from population online survey).
- Ad-hoc data: tailored datasets and software codes (syntax).
- Non-research data: administration, financial, personal.

1.1.2 Overview of the Research Data Management and Open Science Practices

TRUEDEM research agenda involves analysis of secondary survey data and collection of primary personal data that may involve sensitive data. Hence, special procedures to collect, process, manage and store data have been developed. The project coordinator and project partners are aware that research data management deserves special attention and are transparent about the way their research is done, and the way in which data are handled. All data management is conducted in compliance with applicable national and international legislation. The TRUEDEM project participants commit to following the principles described in the General Data Protection Regulation (Regulation (EU) 2016/679), Data Protection Law Enforcement Directive (Directive (EU) 2016/680), Regulation on processing the personal data (Regulation 2018/1725), Regulation on European Data Governance (Regulation (EU) 2022/868); the Data Act adopted by the European Parliament in November 2023 (COM(2022)0068 – C9-0051/2022 –2022/0047(COD)). Furthermore, the project team shall observe and carefully follow the code of ethics of the International Sociological Association, OECD recommendation concerning guidelines governing the protection of privacy and transborder flows of personal data, UN guidelines concerning Computerized personal data files, and other relevant documents available at the level of individual universities, countries and the European community.

TRUEDEM Grant Agreement includes general procedures on how the data management plan (DMP) of the project will be prepared¹. The DMP is developed in compliance with the existing framework for data management plans extensively applied in EU Universities and research organizations. The DMP also complies with the national and EU legislation. The DMP is applicable to all researchers of the TRUEDEM consortium. It includes the following aspects: (1) data safety procedures which are compliant with privacy by design and protection of confidentiality (including GDPR); (2) procedures for quantitative and qualitative data collection, storage, protection, retention, transfer if any, destroying or reuse; (3) metadata documentation, expected schedule for data access, possible restrictions and prohibitions on data reuse, long term preservation and archiving, data repository and sharing; (4) procedures related to the data used for secondary data analysis; (5) ensuring data quality for secondary and primary data, sharing and ownership of data, choice of software; (6) use of methods when observing participants; (7) roles and responsibilities of project staff in the management and retention of data.

The data will be processed lawfully and in line with FAIR principles; processed for the purposes of the project; the collected data is adequate, relevant and not excessive; the data is accurate; the

¹ Grant Agreement: Part B, Description of the Action, Chapter 1.2.10 “Research data management” and Chapter 1.2.9 “Open Science Practices”

data is not kept longer than necessary; the data processed in accordance with the data subject's rights; the data is secure; and not transferred to countries without adequate protection. All data collected will be safeguarded according to the provisions of the General Data Protection Regulation (GDPR) and the relevant laws arising from transposition of the directive into national law, as well as relevant international guidance. The overall project and the research and data management in each Work Package (WP) are subject to compliance with the national legislature of participating countries.

While TRUEDEM relies heavily on the re-use of existing secondary public opinion, expert surveys and statistical data, the key issues associated with data storage, access and safety are applicable to the primary quantitative and qualitative data to be collected in M13-18. During the fieldwork, special care will be taken to uphold high ethical standards with respect to the three key issues:

- (1) Participation of research subjects (as interviewees or survey respondents) will be organized on the basis of **informed consent**. Participants will be given written information sheets, in the language of the country where the study is conducted, explaining the purpose and structure of the project and the use to which data collected through their participation will be put, including open/FAIR data policy principles applied to anonymised data. Participation in the study shall be based on the voluntary basis. The participants have the right to withdraw from the research at any point. Every effort will be made to ensure the safety and security of participants, both in conduct of data collection (e.g. locations of interviews) and in the subsequent use of the information provided. No research participants will be under the age of 18, and the project will not involve any covert research.
- (2) The **privacy of research subjects** will be respected at all times. This is especially important with respect to the collection of data concerning political values and attitudes, political trust, electoral preferences, media use etc. (WPs 1-7). The right of respondents to choose not to answer the questions or provide information will be offered, acknowledged, and respected. Data collection will be thorough and rigorous without being intrusive. Raw data and information that might compromise the privacy of individual participants will be treated as confidential and processed in anonymized form or in generalized (aggregated) format.
- (3) Data will be collected, stored and employed according to the **GDPR and national data protection legislation**. Quantitative data collected in online survey with citizens will be anonymous (identifiers such as IP address, name, address, telephone number etc. that link responses to a specific individual are not collected; the TRUEDEM research team does not know the identity of the respondents). Qualitative data in focus-groups with citizens, interviews with politicians and policymakers, and consultations with CSO leaders will be collected to ensure the confidentiality of the participants. In this case, the personalities and identifiers of the research subjects are known to the research team but are not disclosed any further; the transcripts of interviews are prepared in anonymized format (the name of the expert cannot be matched with the transcript of the interview by anyone, including the research team). As guaranteeing absolute confidentiality is not possible, the participants shall be notified of it (for example, in focus-group interviews all participants of the group will see each other). All details are summarized in the informed consent form signed by every participant in writing. Primary data collection tools developed within the project will be subject to the internal approval by the Working Group on Ethical and Gender Issues and

the Ethical Issues Officer of TRUEDEM as well as the respective ethical boards of the participating organizations.

The consortium will publish all written reports and analytical deliverables under open CC-BY licenses². Scientific papers shall be submitted to open access journals, publications in national languages specially written for target groups and local/regional stakeholders will be published preferably in open access repositories (such as QUCOSA³ or SOAAR⁴), accompanied by social media and mass media announcements or press releases. Paper supporting data will be uploaded to the open-access publications as supplementing materials. The underlying data files will be made openly available through ZENODO⁵ which is the open access repository of the Open Access Infrastructure for Research in Europe. TRUEDEM primary collected data which can be made openly accessible, will be submitted to the repository within 12 months after the approval of the deliverable they have contributed to (D8.1 “Quantitative study: online module (tools, dataset)” (SEN) and D8.2 “Qualitative studies: tools, transcripts, summaries” (SEN)).

1.1.3 Making research data FAIR: Findable, Accessible, Interoperable and Re-usable

The full compliance of TRUEDEM with the FAIR principles of data management will be ensured in the course of project implementation, using the procedures and protocols described in this document (DMP) in Section b) (such as open access to the data when possible and following the rule “as open as possible, as closed as necessary”; unique identifier DOI; multiple open data formats; extensive metadata; open licences, sharing through ZENODO repository, among the other). Extensive use of qualitative research methods, which involve collecting personal and sensitive data, creates certain challenges for making the research data FAIR. For one, transcripts of qualitative interviews will be anonymized, but there still exists a risk of breaching participants' confidentiality. On the other hand, extensive process of anonymisation of qualitative data may compromise the data quality. Due to this, to prevent such breaches or compromises, qualitative data will be made available under restricted access for research purposes only.

1.2 Project's steering bodies responsible for data management and administration

In full compliance with project's Grant Agreement and the Consortium Agreement, as well as in accordance with provisions of the Administrative Manual (D12.1), the steering bodies responsible for the implementation and proper management of data generated by the project are described in section 3.2.3. and include the Project Coordinator, Data Administration Group, Dissemination Group among the others.

² See <https://creativecommons.org/licenses/by/4.0/>

³ See <https://www.qucosa.de/en/startseite/>

⁴ <https://www.ssoar.info/ssoar/>

⁵ See <https://zenodo.org/>

1.3 TRUEDEM research data: definitions and overview

1.3.1 Working definitions

Confidentiality refers to the research team's duty not to share personal information of research participants with the persons who are not qualified to receive that information, in accordance with Article 5(f) of Regulation (EU) 2016/679 and Article 4(f) of Regulation (EU) 2018/1725.

Consent refers to a freely given, specific and informed indication expressed by the research participants by which they agree to participate in the study. In the context of data protection, consent refers to a such (freely given, informed, specific) agreement concerning the procession of their personal data, in accordance with Article 4 (11) of Regulation (EU) 2016/679 and Article 3 (15) of Regulation (EU) 2018/1725.

Dataset generally refers to a digital file that comprises a collection of data. For the purposes of the TRUEDEM project, dataset is understood as a) a collection of quantitative data organized in a tabular format where every row stands for a unit of observation (respondent, country, elections) and every column represents a variable with a characteristic of the unit; b) collection of anonymised qualitative interview transcripts. Both textual and numeric data is included into the datasets in TRUEDEM.

Open access to research data is a principle that stands for the right to access and reuse digital research data under the terms and conditions set out in the Grant Agreement.

Personal data is any information that relates to an identified or identifiable living individual. An identifiable natural person is one who can be identified, directly or indirectly, in particular by reference to an identifier such as a name, an identification number, location data, an online identifier or to one or more factors specific to the physical, physiological, genetic, mental, economic, cultural or social identity of that natural person, in accordance with Article 4 (1) of Regulation (EU) 2018/1725.

Primary data refers to datasets newly collected specifically for the purpose of the ongoing research by the project investigator(s), in accordance with the developed data collection tools and respective theoretical and methodological frameworks.

Quantitative data refers to facts that can be counted or measured in numeric values.

Qualitative data refers to information that is represented through non-numeric units such as words, texts, graphical images, audio- or video-recordings etc. For the purposes of the TRUEDEM project, qualitative data comprises transcripts from focus groups, interviews and consultations represented as textual documents.

Research data refers to information (whether in numeric, textual or other formats) comprising all generated or collected facts, materials that are necessary to validate the research findings. Such data is newly collected (generated) or derived from the previous research, already existing databases, or other sources, and serves as a basis for reasoning, discussion, or calculation.

Research participants refers to individuals, including citizens, and representatives of specific groups such as politicians, civil society leaders, who on a voluntary basis, upon signing a written

consent form act as informants in the study and provide their opinion on a number of issues based on a semi-structured interview guide or a standardized questionnaire. Research participants in the context of TRUEDEM are data subjects as their personal data is being collected, stored, and processed.

Secondary data refers to the pre-existing datasets that has been previously collected for purposes other than the TRUEDEM project and in accordance with other methodologies and techniques. Secondary data could have been collected by the members of the TRUEDEM consortium or third parties, however, that data collection effort was not a part of the TRUEDEM research agenda.

Sensitive data is personal data revealing characteristics and details of an identified or identifiable individual such as racial or ethnic origin, political opinions, religious or philosophical beliefs; trade-union membership; health-related data; genetic data, biometric data; data concerning person's sex life or sexual orientation.

1.3.2 Data formats








Whether primary or secondary, all data to be employed into the TRUEDEM research, dissemination, and exploitation activities can be divided into several groups by its format:

1. **Spreadsheet** refers to a document that enables computation, analysis, and storage of data in a tabular form. In TRUEDEM, the spreadsheet format shall mainly be used for the primary and secondary quantitative data such as the standardized population survey dataset; secondary survey datasets from international cross-country public opinion research projects in Europe and beyond (Eurobarometer, European Social Survey, European Values Study, World Values Survey, Global Barometer Survey among the others); secondary datasets from international cross-country expert surveys (Varieties of Democracy, Quality of Government, Freedom House); population statistics from Eurostat, national statistical offices; macro-economic and other developmental indexes (World Bank, International IDEA etc.). Specific spreadsheet formats to be used in TRUEDEM include Excel, csv, SPSS, Stata, SAS, and R. Secondary data employed for analysis and production of analytical reports and academic publications can be organized and processed in all or any of the listed formats, upon the agreement of the project partners involved into the production of a specific deliverable. Newly processed, agglomerated secondary data as well as primary data which serves as the basis for the project deliverables will be produced and distributed in csv, SPSS, Stata, SAS, and R formats to enhance data usability for the various target audiences and facilitate data re-use.
2. **Online data analysis (ODA)** is an extended version of a standard quantitative spreadsheet which – powered by the JDSurvey software (described below) – provides easy access to the project quantitative datasets declared as project deliverables. ODA employs stepwise approach to the data search by period/ year; country/ territory; specific variable/ indicator. ODA enables all types of users who have no knowledge of use or access to special statistical software to obtain simple statistical outputs of national, cross-country, and time-series data (frequencies, cross-tabulations by one or multiple variables, means) and data visualizations (charts and graphs, including cartography), download and store them as Excel outputs, use in further research, presentations, publications, teaching, or study. ODA is an integral part of the TRUEDEM website (under the section Resources and Deliverables). ODA was first introduced in month 9 (alongside with the publication of D2.1) and is further updated in due course upon

the emergence of other project deliverables (D1.3; D5.2; D6.3; D8.1) represented through primary and secondary quantitative datasets.

3. **Software application codes** refer to the data processing or calculations algorithms that allow to obtain specific findings used to support or refute the research hypothesis. The type of data that comprises this data file is not the descriptive information about the units of analysis (individuals, countries), but the description of the calculation or analytical approach or technique. Software application codes use file formats derivative from the software type used for analysis (i.e. whether SPSS or Stata or else). As a rule, software application codes do not constitute stand-alone deliverables and do not contain immediate research findings, however, become useful information stored in the appendix to a report or an academic publication necessarily for re-use to replicate the analysis and validate the findings.
4. **Textual document** refers to a written, electronic or printed document presenting or communicating a narrative text, data or other information that forms a report, a working paper, a research note or else. Text document format is used for such project data outputs as codebooks for quantitative datasets (WPs 1, 2, 5, 8); transcripts, interview notes and English summaries of expert interviews (WP8); transcripts, interview notes and English summaries of focus-group discussions (WP8); transcripts, interview notes and English summaries of consultations with civil society organizations' leaders (WP8); transcripts and translations of policy workshops/deliberative discussions with civil society organizations and trade unions (WP10); population survey questionnaire (WP8). Text document format will also be employed for most non-data project deliverables and outputs. The main formats used include Word, txt, and pdf files.
5. **Audio** (mp3, wav, aiff, ogg, etc.) data will be obtained in a format of recordings of expert interviews with politicians and policymakers and interviews with civil society organization leaders (WP8). Interviews will be conducted in national languages and further employed for analysis by the national TRUEDEM teams as well as for the production of transcripts and English language summaries (the latter, in a format of a textual file, shall be shared with the whole project consortium).
6. **Video** (mpeg, avi, wmv, mp4 etc.) data will be obtained in a format of recordings of focus group discussions with citizens (WP8) and workshops/ deliberative discussions with civil society organizations (WP10). The interviews/ workshops will be conducted in national languages and further employed for analysis by the national TRUEDEM teams as well as for the production of transcripts and English language summaries (the latter, in a format of a textual file, shall be shared with the whole project consortium).
7. **Graphics/images** (jpeg, svg, png, gif, tiff, etc.) will be created as integral elements of various working papers and analytical reports; data organized in graphical format will become the fundamental element of the set of infographics (D2.2), education materials (D1.4), and project information and dissemination materials (WP11).

Figure 1. Types of research (green) and non-research (red) data outputs in TRUEDEM in the order presented above

							
WP1. Quantitative indicators and long-term trends of political trust	✓	✓	✓	✓			✓
WP2. Voting and electoral behaviour: new challenges for democratic systems	✓	✓	✓	✓			✓
WP3. Socioeconomic transformations in reshaping European democracies	✓		✓	✓			
WP4. Democratic systems and national cultures: transition and interplay of values	✓		✓	✓			
WP5. New identities and emerging cleavages: implications for political polarization	✓	✓	✓	✓			
WP6. Social media and political trust: democracy backing or democracy destabilization	✓	✓	✓	✓			
WP7. Information environment, media use and trust	✓		✓	✓			
WP8. Empirical data collection (quantitative and qualitative studies)	✓	✓		✓	✓	✓	
WP9. Democratic innovations and policy toolkit: knowledge-based policy actions catalogue				✓			
WP10. Multi-level policy interventions for trust-building at local, national, regional, and EU levels				✓		✓	
WP11. Dissemination, Exploitation, Communication				✓	✓	✓	✓
WP12. Project management	✓			✓		✓	✓

1.3.3 Software packages in TRUEDEM: TRINT, JDSurvey and EMDESK

Apart from the standard office software (applications to produce/edit textual files such as word, txt, excel spreadsheets, power point presentations and similar), the following specific software will be employed in TRUEDEM to produce, store, and distribute research data:

Trint (<https://trint.com/>) is an Artificial Intelligence (AI) transcription that converts audio and video files to text, making them editable, searchable and collaborative as a text file. Trint will be employed by the TRUEDEM team to produce the transcripts of expert interviews, focus-group discussions, and interviews with the civil-society organizations conducted in national languages. Trint offers production of automated transcriptions from all languages spoken in the TRUEDEM participating countries where such interviews are to be conducted (Czech, French, German, Greek, Italian, Polish, Romanian, Slovakian, Slovenian, and Swedish), which makes this tool extremely useful for the TRUEDEM research purposes. Trint accepts original files in various formats (audio: MP3, M4A, MP4, AAC and WAV; video: MP4, WMA, MOV and AVI). Transcription is made in the actual interview time duration, and a notification is sent once the transcription is ready. Transcription can be further edited in Trint or exported into other formats such as MS Word, html or csv. According to the TRUEDEM work plan, automated transcripts in national languages shall be verified, proofread and anonymized by human experts (project national team members) and serve as the basis of the interview summaries in English to be produced by the members of each

TRUEDEM team. English summaries will then be shared with the whole project consortium and become the primary data resource (qualitative interview data) for analysis to support research hypothesis and illustrate claims in analytical reports as well as to complement the findings from quantitative analysis.

Data security provisions by Trint: audio, video files and transcripts are securely stored on Amazon Web Services in the us-east-1 (N. Virginia) region (or in Europe, in eu-west-1 (Dublin) for Enterprise accounts). All data is encrypted at-rest using the industry standard AES-256 algorithm. The practice of storing data in the United States is GDPR compliant: “Transfers may be made where the Commission has decided that a third country, a territory or one or more specific sectors in the third country, or an international organisation ensures an adequate level of protection” (article 45 of GDPR⁶). The European Commission recognizes the US as having an adequate level of protection, and Trint has signed an explicit GDPR-compliant agreement with Amazon Web Services (AWS). Original uploaded media is retained for 30 days. Transcripts and transcoded media, required for the purpose of transcript playback, are retained until the user deletes the transcript from their Trint account. Secure deletion may additionally be requested via the Trint customer support team. Trint is ISO 27001 certified⁷.

Software for the online public opinion data collection (details to be confirmed in month 14) will be employed by the subcontracted international data collection agency (to be hired following a public call for tenders announced in January 2023) to conduct an online population survey in 6-8 European countries. More information on the software, data privacy and security provisions associated with the data collection process will be specified upon availability in the next versions of the DMP.

JDSurvey is a data management software that includes functions of data storage, data cleaning and maintenance, production of datasets and codebooks in various formats, as well as online data analysis tool. The architecture of the JDSurvey can be described as a set of coordinated databases combining the survey datasets for multiple countries, with the integrated textual fields that can be used for remarks, questions wording and translations, codes and labels as well as command line to run the harmonization syntax. Additional elements include thesaurus dictionaries, thematic indexes, geographical scope structure and country specific variables dictionaries. The software has been developed with the overall aim to automate all procedures (where technical assistance is possible and meaningful) at all stages of the population survey cycle. The JDSurvey software is primarily employed in the data management procedures associated with the quantitative databases such as online survey and processed, agglomerated secondary data. The JDSurvey is first used to split the questionnaire/ list of indicators into variables with relevant codes and labels, which thus generates the structural matrix for the subsequent data-file. JDSurvey includes also function for comparative revision of the master English questionnaire and an automated English back-translation of the national questionnaires (back-translation first need to be run independently). The system marks any potential items where discrepancies in the meaning of the question might be present, and which are subsequently checked by language experts. This step allows to reach high data comparability in a cross-country survey.

⁶ https://gdprhub.eu/index.php?title=Article_45_GDPR

⁷ <https://support.trint.com/en/articles/3004400-data-security>

All datasets upon their submission are uploaded into the JDSurvey. The software runs algorithms to perform the data quality checks. The technical aspects of data cleaning and data harmonization are also run automatically by JDSurvey, though person-made decisions are required on the exact recordings to be made and steps to follow. The most typical use of JDSurvey is automatic detection of variables featuring “irrelevant” labels and codes – those which are not included into the structure of the target variables. The program allows both assigning correct codes and storing the original codes. Thus, original data is never lost, and the recoding or harmonization decision can be re-visited any time. Computing rules are developed in such a way that applying syntax to a variable that participates in another variable’s syntax results in cascade recalculation. The second group of quality checks includes the filter verification procedures, non-complying cases are signalled, and the variable can be adjusted optionally using recodes or syntax to match the filter rule. Once the syntax with the harmonization decision is written, a note on the decisions made and the applied mapping is added into the particular variable for the particular national dataset. Such notes are stored and can be accessed any time in the future to check or amend the decision. The program documents every cleaning and harmonization step being undertaken for each deposited national dataset. JDSurvey is also used to store the national survey technical documentation as well as to produce textual (pdf) and tables (excel) outputs for different stages of the survey cycle. The software has built-in functions for checking the consistency, completeness, and comparability of the harmonization procedures and outputs. The JDSurvey is also used to enable Online Data Analysis format of data distribution (described above). Finally, JDSurvey servers are also used for storage of public project deliverables that are later made available via the project website (www.truedem.eu).

Data security provisions of JDSurvey: the servers are located in an internal network with no access to any external persons or companies. There are two firewalls and database servers have no public access; only SSL port is open. Servers can only be accessed through the ODA. Internal access uses SSL VPN. Databases are anonymized, and user passwords encrypted in SHA256. JDSurvey servers are located in Madrid, Spain, with all data-related processes being subject to compliance with the GDPR European and national legal provisions on personal data protection. While JDSurvey has the necessary survey measures in place, at the same time only previously anonymized population survey data will be stored and maintained via JDSurvey. The effort on data anonymization and protection of personal data of the respondents will be undertaken by the data collection agency who will conduct the population survey as the subcontract.

EMDESK is a project management software tailored to the specifications of Horizon 2020 and Horizon Europe research programs. EMDESK is employed as the project management software in TRUEDEM and used for purposes such as:

- Coordination of joint efforts on the production of deliverables
- Setting up goals, tasks, deadlines, and to-do lists for partners
- Storage and sharing of project-related administrative documentation
- Drafting joint analytical reports, comments and discussion of the report drafts
- Storage and sharing of secondary data, literature, research notes
- Storage and sharing of sensitive data such as transcripts of expert interviews etc.
- Meeting of project participants.

Therefore, EMDESK is the key project software used for the production, internal storage, exchange and maintenance of research data and non-data research outputs in TRUEDEM. All project teams

have been granted access to EMDESK with three active user accounts and unlimited number of read-only guest accounts per team. EMDESK is the hub for the flows associated with the exchange of internal research data and non-data research inputs and outputs. Project partners upload their country-specific input and other related materials to the relevant WP-related folder or To-Do record.

Security provisions: EMDESK is characterized by a high security level; it has enterprise-class security measures and follows strong technical, logical, and legal precautions to protect the data from loss or unauthorised access. EMDESK platform is developed and maintained in Germany, with the production system and customer data hosted in redundant, secure data centres with the Open Telekom Cloud (OTC by Deutsche Telekom) in Germany, providing end-to-end security and privacy features. EMDESK fully complies with the General Data Protection Regulation (GDPR), the German Federal Data Protection Act (BDSg), as well as the CAN-SPAM Act. EMDESK is a website-based software. The site uses SSL or TLS encryption for security reasons and for the protection of the transmission of confidential content. User files uploaded to EMDESK servers are automatically encrypted with AES 256 using per-file keys. All services are strictly regulated and are regularly checked and certified by independent institutions, in order to meet the latest security and data protection requirements (TISAX, Trusted Cloud, ISO 14001, ISO 22301, ISO 9001, ISO 20000, ISO 27001, ISO 27017, ISO 27018, CSA Star Level 2, TÜV Trusted Cloud Service, TCDP version 1.0). Each user in EMDESK has a unique account with a verified business email address. EMDESK forces users to set account passwords validated against password policies with high security criteria, including complexity, reuse, and expiration requirements. Passwords are hashed and salted in accordance with industry best practice. 2-Factor Authentication is available as an additional security measure to protect EMDESK accounts. User sessions and IP addresses are individually tracked and can be individually audited or revoked by their user⁸.

1.4 Clusters of data in TRUEDEM

TRUEDEM operates with the following types of research data, datasets and non-data outputs united into several principal clusters (see Figure 2 below):

- A. Pre-existing raw and processed research data and datasets.
- B. Newly processed and agglomerated secondary research data and datasets.
- C. Newly collected primary research data and datasets.
- D. Ad-hoc data: tailored datasets and software codes (syntax).
- E. Non-research data: administration, financial, personal.

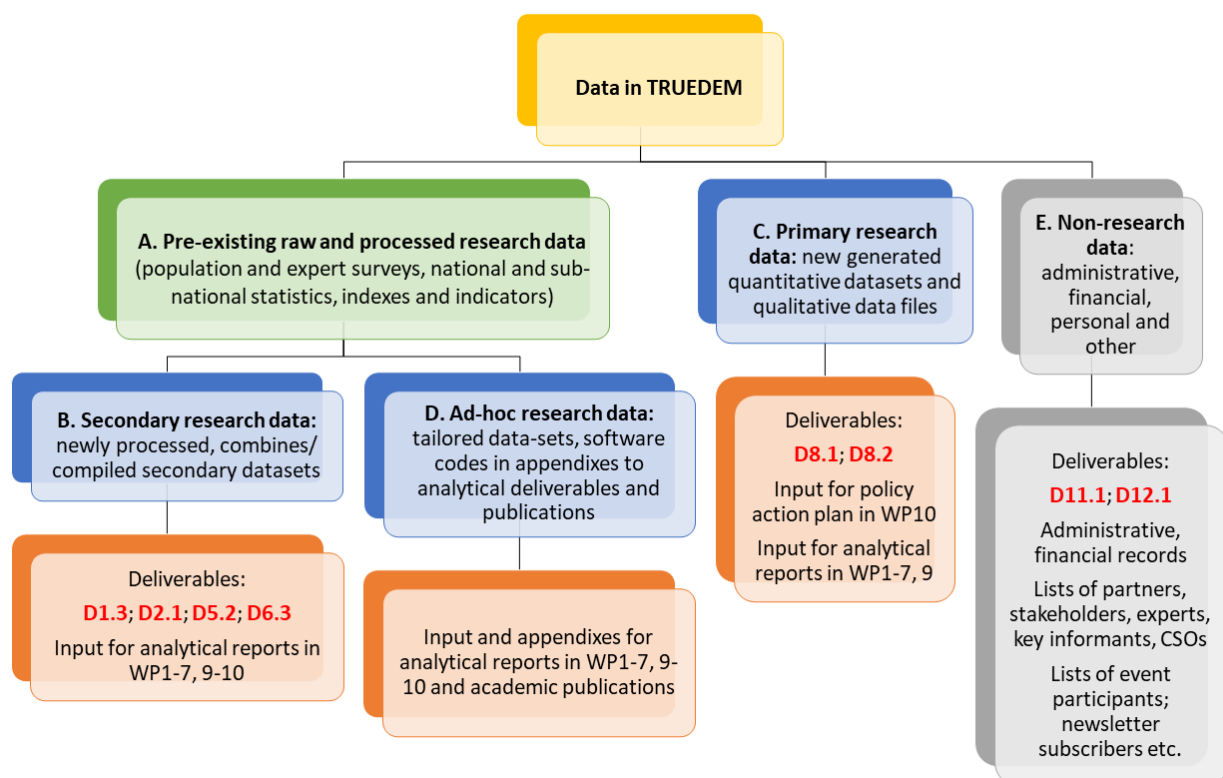
A. Pre-existing raw and processed research data and datasets. TRUEDEM makes a great use of the already available, previously collected public opinion research secondary and statistical data. Reusing data becomes important to main research continuity, efficiently use resources to achieve project goals, save time and resources. Reusing good quality data fosters interdisciplinarity and research visibility thus reinforcing dissemination and exploitation of both project data and findings. Reusing data allows to evaluate the existing methods and findings, which serves as additional review for rigor and validity, originality of findings and contribution to knowledge, avoiding previous errors and enhancing future usefulness of the data. Re-use of the data increases visibility

⁸ <https://www.emdesk.com/product/emdesk-security-centre/security>

of the project and the research team, thus reinforcing dissemination and exploitation of both project data and findings.

Main types of secondary data comprised under this cluster include public opinion research surveys of national level (country-level data on a different set of indicators for every country, employed by the project teams to produce the joint deliverables or to address country-specific issues) and international comparative survey research projects (Eurobarometer, European Social Survey, European Values Study, World Values Survey, Global Barometer Survey among the others). Many of these programs provide their data in free access via repositories or their respective project websites; data can be used openly for research purposes, alongside with a relevant metadata, documentations, references, and acknowledgement. This data are quality-ensured survey research datasets and their validity and reliability have been confirmed by thousands of scholarly publications. In case this is explicitly requested, the TRUEDEM coordinator will request written permission for all project teams to use the data in their deliverables and project-related publications.

Figure 2. Clusters of data in TRUEDEM



Other types of secondary data to be employed include population statistics (from Eurostat, national statistical offices); macro-economic and other developmental indexes (originating from the World Bank, International IDEA etc.); observational, historical and event data (such as the ACLED database of events on the number of protests during the pandemic; dates of elections and other) and data reported by experts (experts surveys such as the Freedom House survey, Varieties of Democracies project and similar). This type of data is analysed to investigate the context in which citizens operate and make their decisions about trust and trustworthiness of political institutions. Thus, depending on the specific focus of deliverables and their separate chapters, further types of secondary data from this category can be included into analysis.

Data in this cluster will primarily be sourced from public sources, networks, agencies, libraries, archives, websites, social media platforms, and other public institutions, including Eurostat, national statistical offices, different research projects and authorities. Preliminary checks have confirmed availability, and where appropriate data is not currently available in existing datasets, actions for the collection of new primary data have been built into WP8 and WP10 (see data cluster C on primary data to be collected). The described above secondary data is primarily used in descriptive narratives, with the relevant references being provided alongside the text. In case secondary data is employed as the basis for calculations and modelling, metadata or references (with link to the source and PID e.g. DOI) will be provided. Alternatively, if requested (for example, by a journal or a publishing house), respective datasets comprising selected variables can be uploaded to the repository together with the report (this type of data is described under cluster D – ad-hoc research data). Secondary datasets used in the project are to be stored securely in EMDESK. As a rule, such datasets have been previously anonymized by the primary data producer and there are no security or ethical aspects related to storage and use of such data.

B. Newly processed and agglomerated secondary research data and datasets. Secondary data, apart from being a source of valuable information on the context, factors, and predictors of political trust, can also generate new knowledge following the application of the new approaches to processing and agglomeration of the previously collected data. TRUEDEM aims to reuse the already existing survey and statistical data on public opinion research perceptions of trust; voting in elections; social and political polarization; and use and political participation via social media. Available secondary data will be collected, harmonized, documented through the addition of metadata, and integrated into several datasets that will serve as input data for all WPs in the project and will be distributed to the public. The new datasets correspond to the project deliverables D1.3; D2.1; D5.2; D6.3. Where requirement, the project coordinator will secure written permission and agreement for the TRUEDEM to process this data from the primary datasets’ producers. Original data sources and other data parameters will be described in the metadata; the detailed description of the new data processing and agglomeration methodology will be provided in the codebook. Newly processed and agglomerated secondary datasets will be distributed in free access via the project website and ZENODO repository. Datasets are first produced in months 9, 12, 16 and 26, and will be updated annually till the end of the project to ensure it remains relevant and up to date. Datasets are produced in multiple FAIR formats, as described in the section below, to facilitate data usability by a greater number of external data users. All databases will remain available at the project website for at least 5 years after the end of the project. Main types of outputs produced within this data cluster include:

RESEARCH DATA

- Agglomerated quantitative cross-country dataset (database in SPSS, Stata, SAS, R, csv formats, in English)

DOCUMENTATION

- Codebook (textual PDF document containing variables report, in English)
- Technical report (textual PDF document summarizing data cleaning and merge methodology, in English; if applicable)
- Variable information log⁹ (Excel table, in English; if applicable)

METADATA

- Metadata in English (XML document).

⁹ <https://ukdataservice.ac.uk/learning-hub/research-data-management/document-your-data/data-level/data-documentation-secondary-sources/>

C. Newly collected primary research data and datasets (WP8, WP10). Cluster C comprises primary empirical research data – data first collected by the TRUEDEM consortium specifically for the purposes of the project. All procedures on planning and implementing the data collection, as well as storage, archiving and maintenance are implemented within WP8. Data collection activities comprise a quantitative survey and a series (portfolio) of qualitative studies that aim to investigate the deeper mechanisms of how citizens perceive trustworthiness and make decisions about trust to political institutions, and what can be the role of institutions and CSOs in strengthening the trust. The set of studies divided by method includes: (1) online population survey with the split-sample experiment; (2) focus group discussions with citizens; (3) expert interviews with politicians and policymakers; (4) consultations with CSO leaders. Design of the new research tools and coordination of their implementation is conducted by ICSR-AT, in cooperation with GAU-FR and with the support of other project partners. Types of data collected within these research activities can be described as personal both sensitive and non-sensitive data. Special case will be taken to ensure anonymization of the collected data, so that no links between the identifiers of the respondents (name, contact details, address etc.) and data on their opinions and attitudes could be established. All data will be used in anonymized and aggregated format only. Participants of all TRUEDEM data collection activities (survey, interviews, FGDs, consultations) will be fully informed about both the aims and purposes of the project, but also the way how collected information will be anonymized and processed; who, how and when has a right to run data quality control; where, for how long it will be stored; who will have access rights to it; how it will be disposed.

Online survey (preliminary planned in 6 countries) in France, Greece, Italy, Poland, Romania, and Sweden (N=1500 per country; N=9000 in total) will be conducted by a single professional data collection agency (selected through a publicly announced call for tenders) to ensure methodological comparability. General population includes adult nationals and long-term residents of the specified countries in the age of 18 years or older. Respondents will be recruited via an established online panel (random selection) or a probability random selection from the general population method. The key requirements to the sample include national-wide coverage and representativity (distribution of groups by gender, age, education, income, settlement type) of the country's overall population to ensure the findings can be extended to the society as a whole. An essential requirement for an online survey tool is that the database in which information about the participating subjects/individuals and the database with the answers are strictly separated from each other. Technically speaking, the links that lead to the online survey receive personalization such as an ID, which records whether the person who clicked on the link has already responded. However, the answers themselves are stored in a second database. The respondents will be informed about the project at the beginning; participation in the survey shall be volunteer and anonymous. The respondents will be given a possibility, upon their free will, to send their email address (strictly separated from the questionnaire) to the project team in order to learn more about the survey and project findings, leave their detailed feedback or engage into other research activities within the project. The email addresses shall be separated from the dataset and stored safely by the data collection agency and the TRUEDEM team.

The online survey is aimed to examine the factors affecting perceptions of trustworthiness and causal mechanisms of trust-building based on the trustworthiness assessment. The survey questionnaire will be designed to address also the research aims and objectives of all WPs, covering a broad scope of questions on trust and its predictors, attitudes to democracy and satisfaction with

the national governing bodies, among the others. More specifically, the topics to be addressed in the quantitative survey include: (1) measures of public trust in diverse agencies at local, national, European and international levels; (2) public values and policy priorities; (3) public evaluations of the performance of agencies and political institutions; (4) measures of civic knowledge, civic education, civic literacy, and cognitive skills; (5) sources of information about politics, media consumption patterns, social media use; (6) political attitudes and socio-political characteristics; (7) demographic and socio-economic characteristics. Main types of outputs produced in relation to this research activity include:

RESEARCH DATA

- Cross-country dataset in English (database in SPSS, Stata, SAS, R, csv formats, in English);

DOCUMENTATION

- Survey questionnaire (textual document in PDF format, in English, and translations in 6-8 European languages);
- Interviewer manual (textual document in PDF format, in English, and translations in 6-8 European languages);
- Respondent information sheet and consent form (textual document in PDF format, in English and translations in 6-8 European languages; presented also at the project website and accessible via an URL);
- Codebook in English (textual document in PDF format containing variables report, in English);
- Survey technical (textual document in PDF format containing survey technical details and methodology of the data collection and cleaning, in English).

METADATA

- Metadata in English (XML document).

All data, accompanied by DOI and metadata, will be shared freely, upon the expiration of the internal embargo period, via the project website (www.truedem.eu), and ZENODO repository.

Focus group interviews with citizens: Czechia (3), France (4), Greece (4), Italy (4), Poland (3), Romania (4) (22 FGDs in total). Focus group discussions represent a method of collecting qualitative sociological information. FGD involve a relatively small number of participants (6-12) meeting together to address one or several specific issues. The discussion is coordinated by a moderator who poses questions, follows the dynamics of the discussion, and adapts the content of main and additional questions, if necessary. FGDs allow learning about the causal mechanisms behind individual actions and options, but at the same time to observe how those opinion might change under the influence of the group. In TRUEDEM, FGDs will be organized on the country-by-country basis, with the project partners organizing and conducting the FGDs themselves. Methodological guidelines for the FGDs study have been developed by the Qualitative Studies Group. In accordance with it, TRUEDEM partners are advised on the average FGD size of 8 (minimum) to 10 (maximum) participants. The major sociodemographic criteria identified for FGDs participants based on the previous study of political trust attitudes are age and education level. Each group should respect gender balance and should be mixed in terms of political interest/political attitudes. Primary topics to be addressed in FGDs include: (1) major challenges faced by the European societies nowadays and participation of political actors and institutions in addressing those; (2) political decision-making practices and ways of their improvement; (3) perceptions of the impact of immigration and the war in Ukraine on the country's development, including the performance of the political system; (4) trustworthiness of politicians and institutions:

personal qualities and other reasons to trust; (5) trust in the EU in the context of European parliamentary elections. Main types of outputs produced in the FGDs sub-study include:

RESEARCH DATA

- Anonymized transcripts (textual documents in MS Word format in the original language of the FGD);
- Summary of the focus-group discussions (textual documents in MS Word format in English);
- Video- and audio-records of FGD interviews (video- and audio-files, sensitive data not for distribution, to be stored by the project teams safely);
- Field notes and observations from the FGD (textual document in PDF format, in English).

DOCUMENTATION

- FGD guide (textual document in PDF format, in English, and translations into European languages);
- Methodological guidelines for FGDs organization, recruitment of participants, recording and transcription, anonymization of transcripts (textual document in PDF format, in English, and translations into European languages);
- Participant information sheet and consent form (textual document in PDF format, in English and translations into European languages; presented also at the project website and accessible via an URL);
- Completed and signed consent forms (sensitive, not for distribution, to be stored by the project teams safely);
- Technical report (textual document in PDF format, in English).

METADATA

- Metadata in English (XML document).

Expert interviews with policymakers and politicians: Austria (N=20), Czechia (N=15), France (N=10), Greece (N=15), Italy (N=15), Poland (N=15), Romania (N=15), Slovakia (N=15), Slovenia (N=20), Sweden (N=15) (155 expert interviews with policymakers and politicians in total). The expert interview is another qualitative method of data collection with the objective of gathering information about a particular issue or a field. Participants of expert interviews - respondents - are identified as experts meaning they have a broad and deep understanding, competence and skills on the studied subject. Experts from the political domain will be invited to comment on the issues of public trust and the role of trust for the country's governance, the quality of governance and the efficiency of political institutions. Other topics to be addressed in the set of expert interviews include: (1) societal and political cleavages shaping the European societies; (2) new democratic innovations and policy actions to enhance trust; (3) political communication and its role in forming the perceptions of trustworthiness and trust-building. In all participating countries, experts shall include representatives of the local, national and European governmental bodies (local/ municipal councils, national government, national parliament, European Parliament, European Commission) as well as members of the groups within the governing political party(s), government or any established special groups, commissions who are directly involved into the design of new / amendment of existing public policies. Gender balance between male and female experts shall be met in every country. The exact composition of the group of experts in every country might be somewhat diverse, depending on the peculiarities of organization of the national political system. It is recommended that at least 1-2 experts are interviewed who specialize in

political communications and public relations. Main types of outputs produced in the experts interviews sub-study include:

RESEARCH DATA

- Anonymized transcripts (textual documents in MS Word format in the original language of the interview);
- Summary of interviews (textual documents in MS Word format in English);
- Audio recordings of interviews (audio-files, sensitive data not for distribution, to be stored by the project teams safely);
- Field notes and observations (textual document in PDF format, in English).

DOCUMENTATION

- Interview guide (textual document in PDF format, in English, and translations into European languages);
- Methodological guidelines will be provided for the organization of work, conducting the interviews, the recruitment of participants, the recording and transcription, and the anonymization of transcripts (textual document in PDF format, in English, and translations into European languages);
- Participant information sheet and consent form (textual document in PDF format, in English and translations into European languages; presented also at the project website and accessible via an URL);
- Completed and signed consent forms (sensitive, not for distribution, to be stored by the project teams safely)
- Technical report (textual document in PDF format, in English).

METADATA

- Metadata in English (XML document).

Consultations with CSO leaders: Interviews in Austria (N=20), Czechia (N=15), France (N=10), Greece (N=15), Italy (N=15), Poland (N=15), Romania (N=15), Slovakia (N=15), Slovenia (N=20), Sweden (N=15) (155 expert interviews with policymakers and politicians in total). Consultation can generally be defined as a process through which the subjects or issues of interest are discussed within or across constituency groups. The aim of a consultation is to seek information, opinion, or advice. Consultations can be conducted in a format of focus group discussions, workshops or webinars, telephone discussions or hotlines, public forums, online communication platforms, and interviews. Consultations become instrumental to establishing two-way communication with stakeholders and thus tailor the research process to the particular demands, development goals, and enhance the policy relevance of results. Civil society organizations can provide local and national knowledge and expertise that is vital to the policy process. In the discussion of the matters of political trust, trust-building and trustworthiness of political institutions the input of civil societies becomes particularly valuable amid their position as an “intermediary” between the political system and the public, their ability to give voice to the opinion of citizens, including underprivileged and underrepresented groups. Experience of other projects in various domains has proven that consultations with CSO contribute to the improvement of policymaking and promotion of public-sector transparency and accountability. The first round of consultations with CSOs is planned in a format of individual interviews with the leaders of civil society organizations of various types. The consultations with CSOs in WP8 in TRUEDEM will kick off the project team’s dialogue and long-term cooperation with civil society; participants of the

consultations, upon their agreement, will be added to the project mailing list and will be offered participation in the observatory of trust (WP1). They will be invited to attend future project events, presentations. Another round of consultations with CSOs will be organized within WP10 in a format of policy workshops (see below).

Consultations with CSOs in WP8 are of exploratory nature aimed at collecting information and seeking CSO's opinion and perspective on a number of project research questions. Topics to be addressed in the set of consultations with CSOs include: 1) role of civil society and their position between the political elite on one hand and citizens on the other; 2) CSO's perspective on trust relations in the country and the underlying mechanisms that affect citizens' trust or mistrust; 3) trust as an assessment of trustworthiness, and the key characteristics that contribute to greater trustworthiness perception; 4) enhancement of trustworthiness and trust of political institutions, and the role of CSOs.. Consultations will involve both operational and advocacy CSO, including community-based organizations, development NGOs, people's organizations, trade unions, foundations, and social movements. In terms of the level of activity, both CSOs active at the local, national and supranational/ EU levels will be included in the consultations. The exact composition of the group of CSOs per country will vary depending on the country's specifics and peculiarities of political development. Main types of outputs produced in this sub-study include:

RESEARCH DATA

- Anonymized transcripts (textual documents in MS Word format in the original language of the interview);
- Summary of interviews (textual documents in MS Word format in English);
- Audio recordings of interviews (audio-files, sensitive data not for distribution, to be stored by the project teams safely);
- Field notes and observations (textual document in PDF format, in English).

DOCUMENTATION

- Interview guide (textual document in PDF format, in English, and translations into European languages);
- Methodological guidelines will be provided for the organization of work, conducting the interviews, the recruitment of participants, the recording and transcription, and the anonymization of transcripts (textual document in PDF format, in English, and translations into European languages);
- Participant information sheet and consent form (textual document in PDF format, in English and translations into European languages; presented also at the project website and accessible via an URL);
- Completed and signed consent forms (sensitive, not for distribution, to be stored by the project teams safely)
- Technical report (textual document in PDF format, in English).

METADATA

- Metadata in English (XML document).

Consultations with CSO leaders: policy workshops in Austria (N=3), Czechia (N=2), Greece (N=2), Italy (N=4), Poland (N=3), Romania (N=2), Slovakia (N=2), Slovenia (N=4), Sweden (N=2), Ukraine (N=2) (26 deliberative policy workshops with CSOs). A set of workshops at local, regional, national and EU level with representative and relevant civil society organisations and trade unions is organized to develop together in deliberation an improvement to the existent policy actions as well as design new policy actions and recommendations for more transparent, representative, responsive

and inclusive political systems. Deliberative democracy is grounded in an ideal in which people come together, on the basis of equal status and mutual respect, to discuss the political issues they face and, on the basis of those discussions, decide on the policies that will then affect their lives. Deliberative approach enables structured process to learn about, discuss, and develop collective solutions to complex social and policy problems and to obtain public input. In frame of this process, we will develop policy actions that will increase inclusion on one hand of civil society organisations and on the other citizens as individuals. CSOs and trade unions engaged in social dialogue can play an important role in enhancing representative system by enabling inclusiveness, responsiveness, promoting transparency and contributing to representativeness of democratic systems.

The aim of this round of consultations with CSOs is to capture the experience of specialized civil society organizations and other similar groups to improve the quality of policies and decision-making; to promote sustainability of the proposed new policy measures; to give voice to the poor and excluded social groups; to set foundations for broad participation to ensure implementation of the new policy measures. Workshops will be conducted (online or in-person) in national language, using a common guide, localized and adapted to the country-specific policy context. Workshops will be video recorded, and transcripts in national language and English translations will be produced afterwards. Main types of outputs produced in this sub-study include:

RESEARCH DATA

- Anonymized transcripts (textual documents in MS Word format in the original language of the consultation);
- Translations of workshop transcripts (textual documents in MS Word format in English);
- Audio and video recordings of workshops (audio- and video-files, sensitive data not for distribution, to be stored by the project teams safely);
- Field notes and observations (textual document in PDF format, in English).

DOCUMENTATION

- Consultation guide (textual document in PDF format, in English, and translations into European languages);
- Methodological guidelines for consultations' organization, recruitment of participants, recording and transcription, anonymization of transcripts (textual document in PDF format, in English, and translations into European languages);
- Participant information sheet and consent form (textual document in PDF format, in English and translations into European languages; presented also at the project website and accessible via an URL);
- Completed and signed consent forms (sensitive, not for distribution, to be stored by the project teams safely)
- Technical report (textual document in PDF format, in English).

METADATA

- Metadata in English (XML document).

For all qualitative studies, the data collection tools, accompanied by DOI and metadata, will be shared openly, upon the expiration of the internal embargo period, via the project website (www.truedem.eu) and ZENODO repository. Anonymized transcripts and summaries in English will be available in restricted access, requiring submission of an access application, including the purpose of use, description of the project, non-redistribution agreement. Original transcripts in multiple languages are considered highly sensitive data and will not be redistributed outside the project team. In the same vein, video and audio recordings which potentially allow to identify the personality of the respondent/

expert/ informant will not be available for re-use outside the TRUEDEM consortium. Non-research data associated with the collected primary data will include names and contact details of key informants (experts) and other participants. Alongside with the audio and video files, this data will be securely stored by the project partners locally, in accordance and compliance with the GDPR and national provisions for the protection of the personal data.

D. Ad-hoc research data (WPs 1-7, 9-10). Cluster D comprises datasets and data-related outputs such as syntaxes for indexes construction, calculation of statistical models etc. that are not stand-alone project deliverables but are used to validate research hypotheses in analytical reports and, following the existing good practice in Social Sciences, are included into appendix to the respective report or academic publication. Such practice contributes further to FAIRification, the increase of re-use of data and projects findings, reproducibility of findings, and greater continuity of research. Ability of other members of the international scientific and research community to reproduce the findings of a specific analytical effort becomes an important criterion of the validity of the obtained results. This is particularly relevant for evidence-based policymaking. TRUEDEM consortium follows this practice and, alongside with the actual deliverables and report texts, provide also description of the relevant methodologies, techniques, and calculation syntaxes describing the analytical algorithm and formulas, models used to arrive at particular research results. Such appendixes, while submitted as a part of the original deliverable, do not constitute examples of stand-alone project data outputs and are categorized in a separate group. This type of information (whether data or calculation syntax) is ad-hoc in its nature, its scope is decided by the WP leader and authors of the report for each analytical deliverable separately and might change during the report writing. The list of specific outputs belonging to this group and their description will be included into the later versions of the DMP.

E. Non-research data (WPs 11, 12). The last cluster of data in TRUEDEM comprises types of data which are used to enable administrative and financial management as well as conduct the planned research, information, dissemination, and exploitation activities. Examples of such non-research data include:

- Personal data from sign-up sheets at workshops, conferences
- Personal data from sign-up form of the electronic newsletter
- Names and contact details of project participants
- Names and contact details of advisory board members
- Working plans, lists of to-dos, minutes from the project meetings.
- Financial records, timesheets.

In compliance with the GDPR regulations (see annex), special care will be applied to store securely personal data. Personal details of the event attendees (name, affiliation, email) will be stored securely at the server of the project coordinator, under password protection, with no external access to it. Personal details of the participants of the research activities (survey, qualitative interviews) will be stored by the survey provider and each project partner separately in a secure location. This data will not be shared with other consortium members, maintaining limited access for the purposes of quality control checks only. Personal data of the e-newsletter subscribers is stored securely in Mailchimp (Mailchimp application is encrypted with TLS 1.2 or higher). Contact details of the project team and advisory board members who gave their agreement for participation in the project and being contacted by the TRUEDEM consortium, alongside with the administrative, financial and other data, will be stored by the coordinator and shared via EMDESK with high security level (described in the previous section).

1.4.1 Pre-existing raw and processed research data (data cluster A)

<i>Type of data</i>	<i>Title of data</i>	<i>Purposes of data generation and use¹⁰</i>	<i>Data access</i>	<i>Data formats</i>	<i>Data language</i>	<i>Estimated data size</i>	<i>Data provenance and ownership</i>	<i>Tentative data users outside of the project (“data utility”)</i>
Secondary cross-national public opinion research project data, questionnaires, codebooks	Eurobarometer survey	Re-use of the existing secondary public opinion and statistical data to validate the research hypotheses in WP 1-10; to enhance existing data collection and processing methodologies and techniques; to boost interdisciplinarity of the research outcomes; to strengthen validity of project findings	No redistribution of original secondary datasets (access via the respective website) For internal use by the TRUEDEM consortium: downloaded datafiles stored and made accessible via EMDESK	csv, SPSS, Stata, SAS, R, PDF, Word	EN	500 MB	The original data producer/owner maintains ownership	Data utilized by the consortium to validate research hypotheses and support the analysis. References to all original sources included into the reports.
	European Social Survey				EN	500 MB		
	European Values Study				EN	500 MB		
	International Social Science Program				EN	400 MB		
	World Values Survey				EN	500 MB		
	Global Barometer Survey				EN	100 MB		
Secondary cross-national expert survey data, questionnaire, codebooks	Varieties of Democracy				EN	400 MB		
	Freedom House				EN	20 MB		
	Electoral Integrity Project				EN	100 MB		
	Global Parties Survey				EN	100 MB		
Statistical data and macro indicators and databases	International IDEA database				EN	100 MB		
	World Bank database				EN	20 MB		
	Eurostat database				EN	100 MB		
	National statistical data				Multiple	300 MB		
	OECD database				EN	50 MB		
	Parties and Elections in Europe Database				EN	50 MB		
	European Consortium for Political Research (ECPR)	EN	100 MB					
	International Organization of Migration (IOM) database	EN	250 MB					
Databases of academic publications	Scopus	EN	500 MB					
	Web of Science (WoS)	EN	500 MB					

¹⁰ In relation to project’s objectives

1.4.2 Newly processed and agglomerated research data (data cluster B)

Type of data	Title of data	Purposes of data generation and use	Data access	Data formats	Data language	Estimated data size	Data provenance and ownership	Tentative data users outside of the project (“data utility”)
Newly processed, agglomerated secondary quantitative dataset	D1.3. Electronic database “Long-term trends of political trust dynamics” (1980-2022): a dataset of quantitative indicators of political trust in Europe from 1980s to the present time.	Re-use of existing public opinion and statistical data with the application of new processing and agglomeration techniques to validate the research hypotheses in WP 1-10; to enhance existing data collection and processing methodologies and techniques; to boost interdisciplinary of the research outcomes; to strengthen validity of project findings	Open access (available on www.truedem.eu and ZENODO)	csv, SPSS, Stata, SAS, R, online analysis at the website	EN	3000 variables over time for 31 countries, incl. 28 EU members, 30 MB	TRUEDEM consortium as a whole and its individual members (teams and researchers)	Academic community, students, HEIs, policymakers and politicians, civil society, media, IOs
Documentation: codebook				PDF	EN	1 MB		
Newly processed, agglomerated secondary quantitative dataset	D2.1. Voter turnout in Europe (1990-2022): longitudinal cross-country quantitative database featuring official data of the European and national election results for EU member states.			csv, SPSS, Stata, SAS, R, online analysis at the website	EN	92 variables over time for 28 EU member states, 8 MB	TRUEDEM consortium as a whole and its individual members (teams and researchers)	
Documentation: codebook				PDF	EN	1 MB		
Newly processed, agglomerated secondary quantitative dataset	D5.2. Electronic database: electronic database comprising a broad scope of quantitative indicators for the comprehensive assessment of political polarization across the EU member-states for 1990-2022.			csv, SPSS, Stata, SAS, R, online analysis at the website	EN	50 variables over time for 28 EU member states, 8 MB	TRUEDEM consortium as a whole and its individual members (teams and researchers)	
Documentation: codebook				PDF	EN	1 MB		
Newly processed, agglomerated secondary quantitative dataset	D6.3. Cross-country database “Political participation in social media”: an electronic database on political participation in social media comprising indicators at European and national levels, based on review of secondary data sources.	csv, SPSS, Stata, SAS, R, online analysis at the website	EN	40 variables over time for 28 EU member states, 8 MB	TRUEDEM consortium as a whole and its individual members (teams and researchers)			
Documentation: codebook		PDF	EN	1 MB				

1.4.3 Data from quantitative online survey (WP8) (data cluster C)

Type of data	Title of data	Purposes of data generation and use ¹¹	Data access	Data formats	Data language	Estimated data size	Data provenance and ownership	Tentative data users outside of the project ("data utility")
Survey tools and pre-survey documentation: questionnaire, information sheet for respondents, informed consent form etc.	Master set suitable for localization	Methodological guidelines and tools necessary to collect new primary data	Open access (available on www.truedem.eu and ZENODO)	PDF	EN	20-40 pages each, 5-8 MB each	TRUEDEM consortium as a whole and its individual members (teams and researchers)	Academic community, students, HEIs
	Localized survey tools for France				FR			
	Localized survey tools for Greece				GR			
	Localized survey tools for Italy				IT			
	Localized survey tools for Poland				PL			
	Localized survey tools for Romania				RO			
	Localized survey tools for Sweden				SE			
Survey outcomes: unified international data base	Full anonymized micro data	Validation of research hypotheses in WP 1-10		csv, SPSS, Stata, SAS, R, online analysis at the website	EN	ca 9,000 respondents, 10 MB	TRUEDEM consortium as a whole	Academic community, students, HEIs, policymakers and politicians, civil society, media, IOs
Survey technical report: quality control and survey technical report	Survey technical report	Quality assurance of the new survey dataset		PDF	EN	20-40 pages, 5-8 MB	TRUEDEM consortium as a whole	Academic community, students, HEIs
Survey technical documentation: codebook	Codebook	Technical document to assist the data-users with the use of the survey dataset		PDF	EN	150-200 pages, 10 MB	TRUEDEM consortium as a whole	Academic community, students, HEIs, policymakers and politicians, civil society, media, IOs
Survey outcomes: country-level frequency and cross-tabulations by key socioeconomic and demographic variables	Survey outcomes: frequency and cross-tabulations by country	Validation of research hypotheses in WP 1-10		PDF	EN	500 pages, 15 MB	TRUEDEM consortium as a whole	Academic community, students, HEIs, policymakers and politicians, civil society, media, IOs

¹¹ In relation to project's objectives

1.4.4 Data from expert interviews with politicians and policymakers (WP8) (data cluster C)

Type of data	Title of data	Purposes of data generation and use ¹²	Data access	Data formats	Data language	Estimated data size	Data provenance and ownership	Tentative data users outside of the project ("data utility")
Qualitative study tools and documentation: expert interview guide, information sheet for respondents, informed consent form, technical report etc.	Master set suitable for localization	Methodological guidelines and tools necessary to collect new primary data	Open access (available on www.trueDEM.eu and ZENODO)	PDF	EN	6-7 pages each, 1 MB each	TRUEDEM consortium as a whole and its individual members (teams and researchers)	Academic community, students, HEIs
	Localized expert interview tools for AT				DE			
	Localized expert interview tools for CZ				CZ			
	Localized expert interview tools for FR				FR			
	Localized expert interview tools for GR				GR			
	Localized expert interview tools for IT				IT			
	Localized expert interview tools for PL				PL			
	Localized expert interview tools for RO				RO			
	Localized expert interview tools for SK				SK			
	Localized expert interview tools for SI				SI			
Localized expert interview tools for SE	SE							
Qualitative Interview Data: anonymized primary interview transcripts in national language	Anonymized interview transcripts for AT	Validation of research hypotheses in WP 1-10	Restricted access: by registration	PDF	DE	N=20; 6-7 pg/interview	TRUEDEM consortium as a whole and its individual members (teams and researchers)	Academic community, students, HEIs, policymakers and politicians, civil society, media, IOs
	Anonymized interview transcripts for CZ				CZ	N=15; 6-7 pg/interview		
	Anonymized interview transcripts for FR				FR	N=10; 6-7 pg/interview		
	Anonymized interview transcripts for GR				GR	N=15; 6-7 pg/interview		
	Anonymized interview transcripts for IT				IT	N=15; 6-7 pg/interview		
	Anonymized interview transcripts for PL				PL	N=15; 6-7 pg/interview		
	Anonymized interview transcripts for RO				RO	N=15; 6-7 pg/interview		
	Anonymized interview transcripts for SK				SK	N=15; 6-7 pg/interview		
	Anonymized interview transcripts for SI				SI	N=20; 6-7 pg/interview		
	Anonymized interview transcripts for SE				SE	N=15; 6-7 pg/interview		
Qualitative Interview Data: anonymized summary of expert interview	Full collection of anonymized interview summaries: English languages summaries of all expert interviews with politicians and policymakers	Validation of research hypotheses in WP 1-10	Restricted access: by registration	PDF	EN	N=155 interviews; 3 pages per interview, 465 pages in total	TRUEDEM consortium as a whole and its individual members (teams and researchers)	Academic community, students, HEIs, policymakers and politicians, civil society, media, IOs

¹² In relation to project's objectives

1.4.5 Data from consultations with CSO leaders (WP8) (data cluster C)

Type of data	Title of data	Purposes of data generation and use ¹³	Data access	Data formats	Data language	Estimated data size	Data provenance and ownership	Tentative data users outside of the project ("data utility")
Qualitative study tools and documentation: CSO consultation guide, information sheet for respondents, informed consent form, technical report etc.	Master set suitable for localization	Methodological guidelines and tools necessary to collect new primary data	Open access (available on www.trueDEM.eu and ZENODO)	PDF	EN	6-7 pages each, 1 MB each	TRUEDEM consortium as a whole and its individual members (teams and researchers)	Academic community, students, HEIs
	Localized CSO consultation tools for AT				DE			
	Localized CSO consultation tools for CZ				CZ			
	Localized CSO consultation tools for FR				FR			
	Localized CSO consultation tools for GR				GR			
	Localized CSO consultation tools for IT				IT			
	Localized CSO consultation tools for PL				PL			
	Localized CSO consultation tools for RO				RO			
	Localized CSO consultation tools for SK				SK			
	Localized CSO consultation tools for SI				SI			
Localized CSO consultation tools for SE	SE							
Qualitative Interview Data: anonymized primary interview transcripts in national language	Anonymized interview transcripts for AT	Validation of research hypotheses in WP 1-10	Restricted access: by registration	PDF	DE	N=20; 6-7 pg/interview	TRUEDEM consortium as a whole and its individual members (teams and researchers)	Academic community, students, HEIs, policymakers and politicians, civil society, media, IOs
	Anonymized interview transcripts for CZ				CZ	N=15; 6-7 pg/interview		
	Anonymized interview transcripts for FR				FR	N=10; 6-7 pg/interview		
	Anonymized interview transcripts for GR				GR	N=15; 6-7 pg/interview		
	Anonymized interview transcripts for IT				IT	N=15; 6-7 pg/interview		
	Anonymized interview transcripts for PL				PL	N=15; 6-7 pg/interview		
	Anonymized interview transcripts for RO				RO	N=15; 6-7 pg/interview		
	Anonymized interview transcripts for SK				SK	N=15; 6-7 pg/interview		
	Anonymized interview transcripts for SI				SI	N=20; 6-7 pg/interview		
	Anonymized interview transcripts for SE				SE	N=15; 6-7 pg/interview		
Qualitative Interview Data: anonymized summary of CSO expert interview	Full collection of anonymized interview summaries: English languages summaries of all consultations with CSO leaders	Validation of research hypotheses in WP 1-10	Restricted access: by registration	PDF	EN	N=155; 3 pages per interview, 465 pages in total	TRUEDEM consortium as a whole and its individual members (teams and researchers)	Academic community, students, HEIs, policymakers and politicians, civil society, media, IOs

¹³ In relation to project's objectives

1.4.6 Data from focus-group discussions (FGD) with citizens (WP8) (data cluster C)

Type of data	Title of data	Purposes of data generation and use ¹⁴	Data access	Data formats	Data language	Estimated data size	Data provenance and ownership	Tentative data users outside of the project (“data utility”)
FGD tools and documentation: FGD interview guide, information sheet for participants, informed consent form, technical report etc.	Master set suitable for localization	Methodological guidelines and tools necessary to collect new primary data	Open access (available on www.trueDEM.eu and ZENODO)	PDF	EN	6-7 pages each, 1 MB each	TRUEDEM consortium as a whole and its individual members (teams and researchers)	Social scientists, students and other project’s stakeholders
	Localized guide for CZ				CZ			
	Localized guide for FR				FR			
	Localized guide for GR				GR			
	Localized guide for IT				IT			
	Localized guide for PL				PL			
	Localized guide for RO				RO			
Qualitative Interview Data: anonymized primary FGD transcripts in national language	Anonymized FGD transcripts for CZ	Validation of research hypotheses in WP 1-10	Restricted access: by registration	PDF	CZ	N=3; 15 pages per FGD	TRUEDEM consortium as a whole and its individual members (teams and researchers)	Academic community, students, HEIs, policymakers and politicians, civil society, media, IOs
	Anonymized FGD transcripts for FR				FR	N=4; 15 pages per FGD		
	Anonymized FGD transcripts for GR				GR	N=4; 15 pages per FGD		
	Anonymized FGD transcripts for IT				IT	N=4; 15 pages per FGD		
	Anonymized FGD transcripts for PL				PL	N=3; 15 pages per FGD		
	Anonymized FGD transcripts for RO				RO	N=4; 15 pages per FGD		
Qualitative Interview Data: summary of FGDs with citizens	Full collection of anonymized FGD interview summaries: English languages summaries of all focus group discussions with citizens	Validation of research hypotheses in WP 1-10	Restricted access: by registration	PDF	EN	N=22; 5 pages per FGD; 110 pages in total	TRUEDEM consortium as a whole and its individual members (teams and researchers)	Academic community, students, HEIs, policymakers and politicians, civil society, media, IOs

¹⁴ In relation to project’s objectives

1.4.7 Data from policy workshops (WP10) (data cluster C)

Type of data	Title of data	Purposes of data generation and use ¹⁵	Data access	Data formats	Data language	Estimated data size	Data provenance and ownership	Tentative data users outside of the project ("data utility")
Qualitative study tools and documentation: policy workshop consultation plan and guide for moderator, information sheet for respondents, informed consent form.	Master set suitable for localization	Methodological guidelines and tools necessary to collect new primary data	Open access (available on www.true-dem.eu and Zenodo)	PDF	EN	6-7 pages each, 1 MB each	TRUEDEM consortium as a whole and its individual members (teams and researchers)	Academic community, students, HEIs
	Localized policy workshops tools for AT				DE			
	Localized policy workshops tools for CZ				CZ			
	Localized policy workshops tools for GR				GR			
	Localized policy workshops tools for IT				IT			
	Localized policy workshops tools for PL				PL			
	Localized policy workshops tools for RO				RO			
	Localized policy workshops tools for SK				SK			
	Localized policy workshops tools for SI				SI			
	Localized policy workshops tools for SE				SE			
Localized policy workshops tools for UA	UA							
Qualitative Interview Data: anonymized transcripts of policy workshops in national language	Anonymized workshops transcripts for AT	Validation of research hypotheses and reasoning of policy action plan in WP 10	Restricted access: by registration	PDF	DE	N=3; 15 pg/workshop	TRUEDEM consortium as a whole and its individual members (teams and researchers)	Academic community, students, HEIs, policymakers and politicians, civil society, media, IOs
	Anonymized workshops transcripts for CZ				CZ	N=2; 15 pg/workshop		
	Anonymized workshops transcripts for GR				GR	N=2; 15 pg/workshop		
	Anonymized workshops transcripts for IT				IT	N=4; 15 pg/workshop		
	Anonymized workshops transcripts for PL				PL	N=3; 15 pg/workshop		
	Anonymized workshops transcripts for RO				RO	N=2; 15 pg/workshop		
	Anonymized workshops transcripts for SK				SK	N=2; 15 pg/workshop		
	Anonymized workshops transcripts for SI				SI	N=4; 15 pg/workshop		
	Anonymized workshops transcripts for SE				SE	N=2; 15 pg/workshop		
	Anonymized workshops transcripts for UA				UA	N=2; 15 pg/workshop		
Qualitative Interview Data: English translations of policy workshop interview transcripts	Anonymized workshops transcripts for AT	Validation of research hypotheses and reasoning of policy action plan in WP 10	Restricted access: by registration	PDF	EN	N=3; 15 pg/workshop	TRUEDEM consortium as a whole and its individual members (teams and researchers)	Academic community, students, HEIs, policymakers and politicians, civil society, media, IOs
	Anonymized workshops transcripts for CZ			PDF	EN	N=2; 15 pg/workshop		
	Anonymized workshops transcripts for GR			PDF	EN	N=2; 15 pg/workshop		
	Anonymized workshops transcripts for IT			PDF	EN	N=4; 15 pg/workshop		
	Anonymized workshops transcripts for PL			PDF	EN	N=3; 15 pg/workshop		
	Anonymized workshops transcripts for RO			PDF	EN	N=2; 15 pg/workshop		
	Anonymized workshops transcripts for SK			PDF	EN	N=2; 15 pg/workshop		
	Anonymized workshops transcripts for SI			PDF	EN	N=4; 15 pg/workshop		
	Anonymized workshops transcripts for SE			PDF	EN	N=2; 15 pg/workshop		
	Anonymized workshops transcripts for UA			PDF	EN	N=2; 15 pg/workshop		

¹⁵ In relation to project's objectives

1.5 Non-data research outputs

A number of non-data research outputs will be created by the TRUEDEM consortium throughout the project life cycle. Such non-data outputs comprise primarily analytical reports declared under WPs 1-10, but also non-report type deliverables such as a set of education materials, infographics, Observatory on Trust, electronic and printed dissemination materials, as well as Dissemination and Ethics plans, and Data Management Plan. The following steps will be undertaken to ensure and enhance the compliance with the principles of **FAIR** (findable, accessible, interoperable, re-usable) distribution, and increase re-use also of the non-data research outputs:

- **Open access:** all non-data research outputs declared as deliverables with the public level of dissemination will be available, upon their submission, in open access via the European Commission portal and will be stored and published at the project website (www.truedem.eu). Furthermore, to encourage re-use of the project findings, links to the respective deliverables will be actively disseminated through the project social media and newsletter; printed versions will be distributed at workshops, academic conferences, and project presentations.
- **Persistent identifier:** unique digital object identifier (DOI) is assigned to all deliverables (via DataCite, an NGO that provides DOIs for research data and other research outputs).
- **Metadata:** document types, author(s)' name and ORCID, title, sub-title, abstract, keywords, project title, project number, contracting organization, date of publication, year, number of pages, language, project URL, copyright statement, DOI will be included into the set of metadata provided for every deliverable, alongside with other mandatory and recommended fields as suggested by the DataCite Metadata Schema¹⁶. Metadata will be provided in formats: XML; PDF, and BibTeX, RiS bibliographic records.
- **Naming convention:** TRUEDEM will use controlled vocabulary and follow the standard of naming convention as recommended by the Stanford University Library File naming guidelines¹⁷ in order to follow a best practice for file naming as a part of managing both paper and electronic records. The provisions include creating names that are informative and allow useful sorting yet are as short as possible and easy to read; including only alphanumeric characters; using cases to distinguish words; avoiding spaces and using underscore “_” and hyphen “-” instead; using YYYY-MM-DD as the date format; versioning. Furthermore, as required by the European Commission, file naming shall use project acronym for project deliverables as equivalent of authorship ownership and include deliverable number. The schema for naming non-data project deliverables is as follows: [TRUEDEM]_[D number]_[Report name]_[v]_YYYY-MM-DD.
- **Ethics and security:** TRUEDEM non-data research outputs are largely represented by analytical reports which, beyond the desk research and literature review, employ empirical evidence from the secondary and primary quantitative and qualitative data. Any references to the specific empirical findings will feature anonymized, aggregated format of the data.

¹⁶ DataCite Metadata Working Group. (2021). DataCite Metadata Schema Documentation for the Publication and Citation of Research Data and Other Research Outputs. Version 4.4. DataCite e.V. <https://doi.org/10.14454/3w3z-sa82>

¹⁷ <https://library.stanford.edu/spc/university-archives/managing-university-records/file-naming-guidelines>

Table 1. Non-data research outputs in TRUEDEM

Deliverables	Type	WP	Format	Language	Distribution	Users
D1.1; D1.2; D1.5	Analytical report, document, policy action plan, working paper	1	PDF	EN	European Commission portal; project website www.truedem.eu , social media, newsletter; distributed papers at workshops, conferences, presentations	Academic community, students, high education institutions, policymakers and politicians, civil society, media, international organizations
D2.3; D2.4; D2.5		2				
D3.1; D3.2; D3.3; D3.4; D3.5		3				
D4.1; D4.2; D4.3		4				
D5.1; D5.3		5				
D6.1; D6.2; D6.4		6				
D7.1; D7.2; D7.3; D7.4		7				
D9.1; D9.2; D9.3		9				
D10.1; D10.2; D10.3		10				
D1.4		Educational materials				
D1.6	Online network	1	Professional network	EN	Membership by registration via the project website	Academic community, students, civil society organizations
D2.2	Infographics	2	JPG, PNG, PDF, printed and electronic infographics	EN; DE; CZ; FR; GR; IT; PL; RO; SK; SI; SE; UA	European Commission portal; project website www.truedem.eu , social media, newsletter; printed version at conferences, workshops, dissemination events	Academic community, students, high education institutions, policymakers and politicians, civil society, media, international organizations
D11.1	Dissemination plan	11	PDF	EN	European Commission portal; project website www.truedem.eu	Project consortium, and external users of project data and results
D11.2	Newsletter		MailChimp, PDF		European Commission portal; project website www.truedem.eu	Academic community, students, high education institutions, policymakers and politicians, civil society, media, international organizations
D11.3	Booklet		Printed materials		EN; DE; CZ; FR; GR; IT; PL; RO; SK; SI; SE; UA	European Commission portal; project website www.truedem.eu , social media, newsletter; printed version at conferences, workshops, dissemination events
D12.2	DMP	12	PDF	EN	European Commission portal; project website www.truedem.eu	Project consortium, and external users of project data and results
D12.3	Ethics plan					

2 FAIR data policy in TRUEDEM project

TRUEDEM recognizes the fundamental importance of the research data management in maintaining high quality of the research and scientific integrity of the findings. TRUEDEM acknowledges that correct and easy retrievable research data are necessary to verify and validate the findings, to ensure their long-term value for future research as well as the widespread use in the society. One of the best-established practices to achieve these goals is to make project data FAIR (Findable, Accessible, Interoperable and Reusable).

2.1 Making data findable, including provisions for metadata

2.1.1 General remarks

The first instance for project data publication will be TRUEDEM website (www.truedem.eu) and an open repository ZENODO which is the open access repository of the Open Access Infrastructure for Research in Europe (<https://zenodo.org/>). Data, which can be made openly accessible, will be submitted to the repository: a) upon the release of the relevant report – for clusters A, D; b) within 12 months after the approval of the deliverable they have contributed to – for clusters B, C. Administrative data (cluster E) is often sensitive, used for internal purposes and shall not be released.

All raw data (including transcripts of interviews, which will not be provided openly) will be stored for at least three years on the servers of the project coordinator, project partners, and subcontracted data collection agencies (if any) responsible for gathering this raw data for validation. The 3-2-1 rule of data archiving will be applied: for each type of data, three copies on two different types of media (virtual cloud and national or EU data storage infrastructure, both password-protected) and one copy off site (secured server of the Project Coordinator). Each partner should ensure that there will be people curating the raw data during this period. The servers for storing the raw data will have necessary security mechanisms, such as password protection, restricted access only to the project partner. Access to this raw data will only be provided for validation. Access will only be provided based on a positive review of the partner that is keeping the data, and if such does not exist at this partner, based on a positive review by the coordinator. Access to data (including transcripts of interviews) for the validation of the results will be possible under strict access conditions. The responsible project partners will ensure access upon request for this purpose based on a review by the coordinator.

The data that can be made openly available (quantitative database; summaries of expert interviews) will be shared through ZENODO. The best practice to make data findable and accessible can be through controlled vocabulary and use of metadata such as keywords, location and date.

2.1.2 Naming conventions

To enable both TRUEDEM project partners and external data-users and stakeholders to identify, locate and use research data more effectively, TRUEDEM follows the data file naming strategy comprising elements of the Stanford University Library File naming guidelines¹⁸ on one hand, and

¹⁸ <https://library.stanford.edu/spc/university-archives/managing-university-records/file-naming-guidelines>

the UK Data Service¹⁹ as recommended by CESSDA²⁰, on the other. The benefits of naming conventions include finding files more easily, creating uniformity, making sorting more predictable, giving clues to the contents of files and folders without a close examination, and controlling versions. Key provisions include: to create meaningful but brief names; to use file names to classify types of files; to use dates in the format YYYY-MM-DD; to avoid using spaces, dots and special characters (& or ? or !); to use hyphens (-) or underscores (_) to separate elements in a file name; to avoid very long file names; to reserve the 3-letter file extension for application-specific codes of file format (e.g. .doc, .xls, .mov, .tif); to include versioning within file names where appropriate. Furthermore, as required by the European Commission, file naming shall use project acronym for project deliverables as equivalent of authorship ownership and include deliverable number.

Table 2. Rules for the naming of project research data

Data cluster	File name
A. Pre-existing data	<ul style="list-style-type: none"> <Dataset name, including type>_ <cross-country/ country name>_ <time period>_ <version number>_ <remarks, if any>.extension <p><i>Example: WorldValuesSurvey_cross-country_1981-2022_V4-0_with-indexes.sav</i></p>
B. Processed secondary data	<ul style="list-style-type: none"> <Acronym: TRUEDEM>_ <D no>_ <Dataset name, including type>_ <country name/ cross-country>_ <time period>_ <version number>_ YYYY-MM-DD.extension <p><i>Example: TRUEDEM_D1-3_TrendsOfPoliticalTrustIndicators_cross-country_1980-2022_V1-0_2023-12-31.csv</i></p>
C. Primary data	<ul style="list-style-type: none"> <Acronym: TRUEDEM>_ <D no>_ <Dataset name, including type>_ <country name/ cross-country>_ <time period>_ <version number>_ YYYY-MM-DD <p><i>Example quantitative:</i> <i>TRUEDEM_D8-1_TrustInEuropeanDemocraciesSurvey_cross-country_2024_V1-0_2024-06-30.csv</i></p> <p><i>Example qualitative:</i> <i>TRUEDEM_D8-2_ExpInt1EnglishSummary_Poland_2024_V1-0_2024-07-31.doc</i></p>
D. Ad-hoc data	<ul style="list-style-type: none"> <Acronym: TRUEDEM>_ <D no>_ <Dataset name or output name, including type>_ <country name/ cross-country, if applicable>_ <time period, if applicable>_ <version number>_ YYYY-MM-DD <p><i>Example:</i> <i>TRUEDEM_D1-1_PublicationsOnTrustScopus_cross-country_2018-2023_V1-0_2023-06-30.csv</i> <i>TRUEDEM_D4-2_ValuesIndexSyntaxForWVS_cross-country_V1-0_2023-11-30.spv</i></p>
E. Non-research data	<ul style="list-style-type: none"> <Acronym: TRUEDEM>_ <D no, if applicable>_ <File name>_ <scope, if applicable>_ <time period, if applicable>_ <version number>_ YYYY-MM-DD <p><i>Example deliverables:</i> <i>TRUEDEM_D11-1_DisseminationPlan_V2-0_2023-06-31.pdf</i></p> <p><i>Example other documents:</i> <i>TRUEDEM_ListExpertsCSO_Poland_2023_V1-0_2023-10-31.xlsx</i> <i>TRUEDEM_ExeComMeetingMarch2023Minutes_V1-0_2023-04-12.docx</i></p>

¹⁹ <https://ukdataservice.ac.uk/learning-hub/research-data-management/format-your-data/organising/>

²⁰ CESSDA Training Team. (2020). CESSDA Data Management Expert Guide. CESSDA ERIC. <https://doi.org/10.5281/zenodo.3820473>

2.1.3 Persistent Identifier

TRUEDEM research data outputs (deliverables) and data files associated with analytical deliverables will have a persistent identifier assigned to them. Unique digital object identifier (DOI) is assigned to all data research deliverables via Zenodo.

2.1.4 Metadata

Metadata comprises data necessary for understanding various aspects of the available research data. Metadata makes tracking and working with specific data easier, it increases re-use of data. Metadata are intended for machine-reading, and often produced during the submission of the data for publication in repositories. For the research data and other data outputs, TRUEDEM follows the metadata schema as suggests by the Data Documentation Initiative (DDI), as the recommended standard for research in the social science. It offers an international standard for describing the data produced by surveys and other observational methods; it is usually produced in XML format and supports the entire research data lifecycle (DDI Alliance, 2017)²¹. Metadata for the research data published at the TRUEDEM website will be provided in formats: XML; PDF, and BibTeX, RiS bibliographic records. The common fields include:

- Title
- Alternate Title
- Principal Investigator
- Funding
- Bibliographic Citation
- Series Information
- Summary
- Subject Terms
- Geographic Coverage
- Time Period
- Date of Collection
- Unit of Observation
- Universe
- Data Type
- Sampling
- Weights
- Mode of Collection
- Response Rates
- Extent of Processing
- Restrictions
- Version History
- Persistent identifiers for related research outputs (if applicable)

Furthermore, upon the publication of research data in repositories, further metadata records will be produced. In such cases, default metadata template offered by the repository will be used. For example, the metadata schema suggested by da|ra (<https://www.da-ra.de/>), includes the following fields (metadata formats are XML, JSON):

- Identification: resource type, resource identifier, DOI, URL
- Language
- Title
- Creator(s)
- Origin information: publisher, publication date and place

²¹ <https://ddialliance.org/Specification/DDI-Lifecycle/3.3/>

- Access: availability, embargo date, rights
- Contributor(s): name(s), affiliation(s), ORCID
- Funding reference
- Methodology: data collection mode, sample description, time dimension, geographical coverage
- Data-set type, number of units, number of variables
- Discipline(s), keywords
- Relation to other existing datasets
- Associated publications

TRUEDEM Coordinator will be responsible for the production of the metadata files, alongside the publication of the final datasets at the project website, their distribution via selected repositories, and submission to the European Commission. The project partners will provide assistance should any additional information be required. Alongside with the descriptive PDF format readable by researchers who have no access to other software, metadata will be provided also in machine-readable formats (XML, JSON, BibTeX, RiS among the others) thus allowing it to be harvested and indexed. Detailed metadata will be provided for research data not available in free public access (sensitive data from qualitative interviews).

2.1.5 Other data documentation

Beyond the research data and associated metadata, the following data documentation will be produced and made available for the project participants and external research data users:

<i>Primary quantitative data</i>	<i>Primary qualitative data</i>	<i>Secondary quantitative data</i>
<ul style="list-style-type: none"> ▪ Survey questionnaire ▪ Information sheet and consent form ▪ Survey technical report ▪ Sampling plan ▪ Weighting methodology ▪ Codebook (variables report) 	<ul style="list-style-type: none"> ▪ Expert interviews, policy workshops and FGDs guidelines ▪ Information sheet and consent form ▪ Methodology report ▪ Anonymization report ▪ Data list, including information on interview ID, age, gender, occupation, organisation, location, place of interview, date of interview²² ▪ Anonymized transcripts of interviews in national language(s) ▪ English summaries of anonymized transcripts 	<ul style="list-style-type: none"> ▪ Variable information log, including information on variable name and label, source dataset, DOI, license information, units of analysis, method of collection, date of data download, brief description of the data²³ ▪ Codebook (variables report)

2.1.6 Keywords

All research data outputs will be provided with the relevant keywords following the thesaurus of the GESIS Classification Social Sciences, ZA-Classification (GESIS Data Catalogue) and other relevant classifications.

²² <https://ukdataservice.ac.uk/learning-hub/research-data-management/document-your-data/data-level/data-documentation-qualitative-data/>

²³ <https://ukdataservice.ac.uk/learning-hub/research-data-management/document-your-data/data-level/data-documentation-secondary-sources/>

2.2 Making data accessible

2.2.1 Repository and open access publications

In the first instance, project’s research data will be available on TRUEDEM project portal (<https://www.truedem.eu/>) (section Resources) and shared via Zenodo repository. This website will be regularly updated during the lifetime of the project (until 28 February 2026) and will be furtherly maintained as a passive storage during the subsequent five years (until 31 December 2030).

In addition, we will rely on several repository services, which will be used to share the metadata. Among them, there are: **da|ra** (<https://www.da-ra.de/>); **Dataverse** (<https://dataverse.harvard.edu/>); **Zenodo** (<https://zenodo.org>), **OpenAIRE** (<https://www.openaire.eu/>) and other platforms suggested in the **Registry of Research Data Repositories** (<https://www.re3data.org/>). Project partners will be encouraged to distribute research data via their national data archives – members of the CESSDA network (<https://www.cessda.eu/About/Consortium>). TRUEDEM team will ensure that all data has been assigned DOIs either when uploading the data to a respective repository, or prior to that.

Table 3. Details on data repositories per team

	Notes / details on data repositories
1. ICSR-AT	Austrian Social Sciences Data Archive (https://aussda.at/)
2. MUP-CZ	Czech Social Science Data Archive (Český sociálně-vědní datový archiv, CSDA), part of the Institute of Sociology of the Academy of Sciences of the Czech Republic (SoÚ AVČR) - https://archiv.soc.cas.cz/cz/
3. GAU-FR	To be confirmed
4. LUL-DE	To be confirmed
5. UOP-GR	To be confirmed
6. UNISA-IT	To be confirmed
7. USK-PL	RepOD is Polish general-purpose repository for open research data, offering all members of the academic community in Poland the possibility to deposit their work. It is intended for scientific data from all disciplines of knowledge and in all formats. University of Silesia has established its institutional data collection in repOD(https://repod.icm.edu.pl/)
8. UOB-RO	Romanian Social Data Archive – RODA, CESSDA member (http://www.roda.ro/)
9. UKBA-SK	Slovak Archive of Social Data (http://sasd.sav.sk/en/)
10. UOL-SI	Slovenian Social Science Data Archives (https://www.adp.fdv.uni-lj.si/eng/)
11. BIK-SE	To be confirmed
12. KGNU-UA	To be confirmed

2.2.2 Open data access and embargo

The data that can be made openly available (database; inventory; other data) will be shared through ZENODO. Part of the data may also be shared through other repositories (in that case, links will be provided).

Data shared via the TRUEDEM website and repositories in open access will be subject to compliance with the provisions for anonymity of informants (respondents), protection of their privacy and personal data, in accordance with GDPR (see annex). As TRUEDEM actively employs collection and processing of personal data revealing racial and ethnic origin, political opinions, religious and philosophical beliefs, trade union membership etc. for research and scientific reasons, special care will be taken to ensure that such information can be brought in connection with the personal information of the respondent (name, address etc.). Due to this, to protect the privacy and confidentiality of the respondents (as voices, images or specific details mentioned can be brought in association with a particular person), no original video, audio records or transcripts of qualitative interviews will be provided in open access. Instead, anonymized transcripts and anonymized English language summaries will be used as units of analysis by the TRUEDEM consortium. Both anonymized transcripts in national language(s) and anonymized English language summaries will be made available for researchers in restricted access, upon registration, and after signing an agreement on non-redistribution of the data. These steps are necessary for the protection of privacy and personal data of respondents. For the same reason, certain types of data containing sensitive information (original audio, video records, lists of participants etc.) for every country will be stored locally by every consortium member and kept for a period of 5 years, if necessary for quality assurance and verifying the validity of the data. This sensitive data will not be shared with other consortium members via EMDESK.

In accordance with Article 17 of the Grant Agreement, “the beneficiaries must manage the digital research data generated in the action (‘data’) responsibly, in line with the FAIR principles and by taking all of the following actions: [...] as soon as possible and within the deadlines set out in the DMP, ensure open access [...] via the repository [...] unless providing open access would in particular: [...] be contrary to any other constraints, in particular the EU competitive interests or the beneficiary’s obligations under this Agreement”. In line with this provision, TRUEDEM embargo policy is applied to give the members of the consortium time to produce and public analytical reports and academic publications and to generate the respective innovation and impact of the scientific and policy-oriented findings. While secondary databases, survey tools and interview guides, technical reports, accompanied by the relevant metadata, will be published immediately upon their production, raw quantitative and qualitative research data will be released with an internal embargo period of up to 12 months. This policy complies with the Horizon Europe requirement for the data to be deposited as soon as possible after its generation and, at the latest, by the end of the project. All TRUEDEM research data will be released before the end of the project.

Table 4. Open data access and embargo policy

	<i>Data production</i>	<i>Data release</i>	<i>Means</i>	<i>Access mode</i>
SECONDARY DATA				
D1.3. Electronic database “Long-term trends of political trust dynamics” (1980-2022)	Jun-Dec 2023	Jan 2024	Project website, Harvard Dataverse	Open access
D2.1. Voter turnout in Europe (1990-2022): longitudinal cross-country quantitative database	May-Sept 2023	Oct 2023		
D5.2. Electronic database on political polarization across the EU member-states for 1990-2022	Jan-Apr 2024	May 2024		
D6.3. Cross-country database “Political participation in social media”	Jan-Feb 2025	March 2025		
AD-HOC SECONDARY DATA				
Input and appendixes for analytical reports in WP1-7, 9-10 and academic publications	Throughout the project cycle	Upon the publication of paper/article/report	Project website, Zenodo	Open access
PRIMARY DATA				
D8.1. Survey tools and pre-survey documentation: questionnaire, information sheet for respondents, informed consent form etc.	Oct-Dec 2023	April 2024	Project website, Zenodo	Open access
D8.1. Survey outcomes: unified international data base	Jan-Jun 2024	Sept 2025		
D8.1. Survey technical report: quality control, survey technical report	Jun 2024			
D8.1. Survey technical documentation: codebook	Jun 2024			
D8.1. Survey outcomes: country-level frequency and cross-tabulations by key socioeconomic and demographic variables	Jun 2024			
D8.2. Qualitative study tools and documentation: qualitative interviews guides, information sheet for respondents, informed consent form, technical report etc.	Oct-Dec 2023	April 2024	Project website	Open access
D8.2. Qualitative Interview Data: anonymized interview transcripts in national language	Jan-Aug 2024	Sept 2025	N/A	Restricted: upon registration
D8.2. Qualitative Interview Data: anonymized English summaries of all interviews	Jan-Aug 2024		N/A	Restricted: upon registration
Video and audio data related to D8.1	Jan-Aug 2024	N/A	N/A	Restricted: local team only
WP10: Qualitative study tools and documentation	July-Sept 2024	Oct 2024	Project website	Open access
WP10: English translations of anonymized transcripts	March-April 2025	Dec 2025	N/A	Restricted: upon registration
WP10: Qualitative Interview Data: anonymized interview transcripts in national language	Oct 2024-Feb 2025		N/A	Restricted: upon registration
Video and audio data related to policy workshops in WP10	Oct 2024-Feb 2025	N/A	N/A	Restricted: local team only

2.2.3 Data access protocols

All raw data (including primary transcripts of interviews, which will not be provided openly) will be retained for at least three years on the servers of the project partner responsible for gathering this raw data (this data is often in the local language of that partner, and it is better not to transfer unnecessary personal data between partners) for validation. Each partner should ensure that there will be people curating the raw data during this period. Each partner should ensure that there will be people curating the raw data during this period. The servers for storing the raw data will have necessary security mechanisms, such as password protection, restricted access only to the project partner. Access to this raw data will only be provided for validation. Access will only be provided based on a positive review the partner that is keeping the data, and/or based on a positive review by the coordinator. Sensitive personal data will be stored securely by the Coordinator and every partner separately; there will be no sharing, exchange or external access to sensitive personal data, in accordance with the GDPR provisions. The 3-2-1 rule of data archiving will be applied: for each type of data, three copies on two different types of media (virtual cloud and national or EU data storage infrastructure, both password-protected) and one copy off site (secured server of the Project Coordinator).

Working versions of the research data and non-data research outputs will be stored in EMDESK project software; access to the EMDESK is regulated by the Project Coordinator, and only verified users (project participants) have access to this information and files.

The data that can be made openly available (quantitative primary and newly produced secondary databases; other data) will be shared through the project website and Zenodo. Part of the data may also be shared through other repositories (in that case, links will be provided) and access to data will be governed by the repositories access protocols.

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

All project public deliverables, including research data, will be available at the project website for 5 years until the end of the project (2030). The period of availability of the data through repositories will depend on the terms and conditions of each repository. According to Zenodo's general policies (<http://about.zenodo.org/policies/>), for example, "items will be retained for the lifetime of the repository. Metadata will be guaranteed to remain available after data is no longer available.

2.2.4 Applicable software allowing accessibility of data

To facilitate data reuse and enhance data reuse by various group of data users and stakeholders, TRUEDEM data will be provided in several formats, including both specialized statistical data processing software for quantitative dataset (SPSS, Stata, SAS, R, csv), but also online data analysis and data reports in textual format (PDF) which do not require specific knowledge or costs associated with the purchase of a specialized software. Any statistical analysis software codes will

be provided in several formats accounting for the most widely used statistical software (SPSS, Stata, R). A contact email address will be listed at the project website that can be used to data-related send questions to the TRUEDEM (data management officer from the coordination team will attending to these requests).

2.3 Making data interoperable

Data interoperability refers to the ways in which data is formatted that allow diverse datasets to be merged or aggregated in meaningful ways. It is also a feature of datasets whereby data can be easily retrieved, processed, and re-used by other systems. Interoperability can be achieved at different levels, including data record (data item types, identifiers, domain, range etc.); dataset (structure, format); metadata (information about the dataset; authors; license etc.); distribution (access URL; download URL; access format etc.); data repository (title; description; license etc.).

Quantitative research data in TRUEDEM comprises primary and secondary datasets accumulating information on the subjective opinions and attitudes of individual respondents, national and sub-national level statistics, expert survey data. In accordance with the established practices, the datasets will be organized in country-year format and will employ classifications of the International Standards Organization (ISO) for country and region codes, occupation, education, and other characteristics. As a rule, country-year information can be used to merge these quantitative datasets with other statistical and survey databases. Newly processed, agglomerated secondary data as well as primary data which serves as the basis for the project deliverables will be produced and distributed in csv, SPSS, Stata, SAS, and R formats to enhance data usability for the multiple target audiences and facilitate data re-use. Every dataset will be accompanied by metadata and documentation, including for example a codebook explaining the measurement unit of every variable. This information becomes crucial to facilitate data reuse and interoperability.

TRUEDEM research data, in particular the newly processed and agglomerated quantitative datasets will include qualified references to other data. The variable logs will specify which other datasets this one builds on; if complementary information is stored in a different dataset; citations to all input dataset, including their globally unique and persistent identifiers.

2.4 Increase data re-use

Documentation needed to validate analysis and facilitate data re-use will include:

- 1) Primary quantitative data: questionnaire; information sheet and consent form; survey technical report, including information on sampling, weighting, data cleaning; codebook;
- 2) Primary qualitative data: interviewer guidelines; information sheet and consent form; methodology report; anonymization report; data list, including information on interview ID, age, gender, occupation, education, location of interview, date of interview²⁴;
- 3) Secondary quantitative data: variable information log, including information on variable name and label, source dataset, DOI, license information, units of analysis, method of

²⁴ <https://ukdataservice.ac.uk/learning-hub/research-data-management/document-your-data/data-level/data-documentation-qualitative-data/>

collection, date of data download, brief description of the data²⁵; codebook.

This documentation will be created by the project teams, WP leaders, the project coordinator, or the data administration group (as described in Section **Error! Reference source not found.**). This documentation will be produced in English and shared/ published alongside with all datasets to facilitate data re-use.

Ad-hoc datasets, calculation syntaxes etc. used to produce specific analytical report, working papers, and academic publications will be shared via the project website and repositories (Zenodo); in case of gold open access publications, this information will be published as appendix to the article text. In case of publications, every author/ co-author/ group of authors shall be responsible for the production of all related documentation and ad-hoc research data.

3 Allocation of resources

3.1 Costs related to data storage, maintenance, transfers, and dissemination.

Costs associated with making the data and other research outputs FAIR (that is direct and indirect costs related to the storage, archiving, re-use, and security etc. of data) in TRUEDEM are distributed between the coordinator and all project partners. Coordinator's budget includes 34% of the overall costs budgeted for the data storage, archiving, and maintenance amid the leading role the project coordinator assumes in all data-related processes, including production and publication of final research data outputs, registering DOIs and creation of metadata, data cleaning and cording to ensure the data is interoperable, publication of the data outputs through most important electronic data archives and repositories among the other. To the extent possible, these data-related costs are estimated as shown in table below. This summarizing table will be reviewed annually and updated as needed.

Table 5. Estimation data-related costs (stand as of June 2023)

	<i>Personnel costs²⁶</i>	<i>Open access publications C3</i>	<i>Purchase costs C3</i>	<i>Total direct costs</i>	<i>Related indirect costs 25%</i>	Total TRUEDEM Funds
1. ICSR-AT	€ 35,000.00	€ 3,000.00	€ 260.00	€ 38,260.00	€ 9,565.00	€ 47,825.00
2. MUP-CZ	€ 5,000.00	€ 3,000.00	€ 260.00	€ 8,260.00	€ 2,065.00	€ 10,325.00
3. GAU-FR	€ 3,000.00	€ 2,000.00	€ 260.00	€ 5,260.00	€ 1,315.00	€ 6,575.00
4. LUL-DE	€ 3,000.00	€ 3,000.00	-	€ 6,000.00	€ 1,500.00	€ 7,500.00
5. UOP-GR	€ 3,000.00	€ 3,000.00	€ 260.00	€ 6,260.00	€ 1,565.00	€ 7,825.00
6. UNISA-IT	€ 5,000.00	€ 5,000.00	€ 260.00	€ 10,260.00	€ 2,565.00	€ 12,825.00
7. USK-PL	€ 3,000.00	€ 3,000.00	€ 260.00	€ 6,260.00	€ 1,565.00	€ 7,825.00
8. UOB-RO	€ 5,000.00	€ 2,000.00	€ 260.00	€ 7,260.00	€ 1,815.00	€ 9,075.00
9. UKBA-SK	€ 5,000.00	€ 2,000.00	€ 260.00	€ 7,260.00	€ 1,815.00	€ 9,075.00
10. UOL-SI	€ 3,000.00	€ 3,000.00	€ 260.00	€ 6,260.00	€ 1,565.00	€ 7,825.00
11. BIK-SE	€ 3,000.00	€ 5,000.00	€ 260.00	€ 8,260.00	€ 2,065.00	€ 10,325.00
12. KKNU-UA	€ 1,000.00	€ 2,500.00	€ 260.00	€ 3,760.00	€ 940.00	€ 4,700.00
TOTAL:	€ 74,000.00	€ 36,500.00	€ 2,860.00	€ 113,360.00	€ 28,340.00	€ 141,700.00

²⁵ <https://ukdataservice.ac.uk/learning-hub/research-data-management/document-your-data/data-level/data-documentation-secondary-sources/>

²⁶ Estimations, subject to adjustments if needed

Budgets of project partners include a) funds dedicated to the open access publications (€ 3,000.00 per partner on average); b) personnel costs associated with the input into the data maintenance (€ 3,000.00 per partner on average; € 5,000.00 per partners who lead a WP that include production of data outputs); c) other purchase costs (costs of the Trint subscription € 65 per user per month for a period of 4 months). Smaller budget for data maintenance has been allocated to the team of Ukraine whose research agenda includes a limited plan for primary data collection due to the security situation.

Budget of the project coordinator includes a) personnel costs associated with the employment of the Data Administration Office (DAO) for the whole period of project duration who is in charge of the cleaning, maintenance, storage, archiving of the data and ensuring its security (€ 35,000.00); b) funds dedicated to the open access publications (€ 3,000.00); c) other purchase costs (costs of the Trint subscription € 65 per user per month for a period of 4 months). Furthermore, costs of the JDSurvey software (€100 per month) and costs of the EMDESK subscription for the whole TRUEDEM consortium (€2,295.00 per annum for 40 users) are covered from the Related indirect costs of the coordinator.

3.2 Data management policies and procedures in TRUEDEM project

3.2.1 Data management overview

Each TRUEDEM partner is required to respect the policies set out in this DMP. Datasets must be created, managed, and stored appropriately and in line with applicable legislation. The Project Coordinator has the overall responsibility to ensure that data shared through the project website (<https://www.truedem.eu/>) are easily available, but also that backups are performed, and that proprietary data are secured. Each work package leader will ensure dataset integrity and compatibility for its use during the project lifetime by different partners. Validation and registration of datasets and metadata is the responsibility of the partner that generates the data in the WP. Metadata constitutes an underlying definition or description of the datasets and facilitate finding and working with particular instances of data. Backing up data for sharing through open access repositories is the responsibility of the partner possessing the data and the Project Coordinator. Quality control of these data is the responsibility of the relevant WP leader, supported by the Project Coordinator. If datasets are updated, the partner that possesses the data has the responsibility to manage the different versions and to make sure that the latest version is available in case of publicly available data. Naming and version convention outlined in DMP is to be followed. Finally, all partners must consult the concerned partner(s) before publishing data in the open domain that can be associated with an exploitable result.

3.2.2 Data management bodies

The responsibilities for research data management in TRUEDEM and after the end of the project lie with the project partners, who are also required to ensure that respective national and international codes of conduct, legislation, and intellectual property rights are duly respected. Amid the various types of research data employed in TRUEDEM (primary data collection, reuse of secondary data, new procession and agglomeration of secondary data), different project bodies are involved at different stages of the research data management process. Main bodies involved into the data management in TRUEDEM include:

- 1) **Data Administration Group (DAG)** chaired by the data administration officer of the coordinator (Ing. Jaime Diez-Medrano) and comprising data administration officers from every national project team. The tasks of the DAG include overseeing the technical procedures related to the data production, data cleaning, storage, and dissemination. DAG is responsible for producing the data in multiple formats, advising the consortium on any additional formats or software that might be useful to further facilitate compliance with the FAIR principles and enhance data reuse by the third parties. DAG Chair at Coordinator shall be responsible for uploading the final datasets to the project server and project website, design of the online data analysis, data archiving, maintenance and storage, including storage of documentation.
- 2) **Quantitative and Qualitative Studies Technical Group (QQSTG)** (further sub-divided into the Qualitative Sub-Group and Quantitative Sub-Group) within TRUEDEM is responsible for the overall planning of the primary data collection; design and validation of the empirical data collection tools; including quantitative online survey questionnaire and qualitative interview guides; planning of the timeline and quality assurance framework for all empirical data collection efforts. Each group comprises representatives of every team where the specific type of primary data collection is planned to take place as well as members from the project teams who are responsible for the WPs which involve analysis of the primary collected data. Such group composition is necessary to ensure the needs and specific research questions within the individual WPs are given proper consideration when planning the data collection. The group also includes Social Scientists with the background in both quantitative and qualitative survey paradigms. Beyond planning and quality control, QQSTG will also contribute to the production of technical documentation and codebooks.
- 3) **Project Coordinator (PC)**, beyond participation in the work of other data management bodies (DAG and QQSTG), is responsible for the overall design and implementation of the research data management cycle in TRUEDEM. Coordinator is primarily responsible for publications and dissemination of the data, data maintenance, ensuring data is FAIR and ensuring that all data-related procedures have been implemented in accordance with the DMP provisions. Coordinator will be involved into all stages of the data management process either with the specific set of tasks or as observer.
- 4) **Work Package Leaders (WPL)** are leading researchers responsible for the design and implementation of the research agenda within individual WPs. Depending on the scope of the WP, data-related procedure might include collection/ production of primary or secondary datasets serving as project research data deliverables, or collection and analysis of secondary data as a part of analytical reports, working papers, and publications. The role of WPLs becomes crucial to develop the necessary guidelines for the data collection and quality control, identify the relevant indicators and recommend the data sources. All data management procedures by the WPLs are aimed to ensure that the collected/ employed data is relevant (that is corresponds to the declared goals of the WP), of high quality and properly documented (including guidelines for data collection, metadata and codebooks describing the structure and content of the final datasets).
- 5) **Project partners** (other than WP leaders and members of specific project bodies) are primarily involved into the implementation of the data collection and data analysis for the purposes of contribution to the specific data and non-data research deliverables (reports, working papers).

- 6) **Dissemination and Communication Group (DCG)** is responsible for the dissemination and communication of project results to target groups of end-users: researchers, students, policymakers, and representatives of CSOs at local, national and international level as well as the general public. DCG includes appropriate experts from the project teams to ensure effective coordination of internal and external communication of the consortium.
- 7) **External data collection agency(s) (DCA)** will be engaged as sub-contractor(s) to perform the primary data collection, including the quantitative online population survey in 6-8 European countries in winter of 2024, and in some countries – services for the qualitative interviews and FGDs (such as recruitment, transcription or translation, unless this is performed by the respective project partner). DCA(s) will implement the quantitative data collection using the questionnaire and methodological guidelines designed by the QQSTG. DCA(s) will further perform quality control (as the only body that has access to the personal data describing the composition of the online panels and characteristics of the participants of research activities), data cleaning, data storage, backup, preservation and deletion (reserve copy of the data and all related documentation, including sensitive data about the research participants, will be securely stored at DCA for the agreed number of years and destroyed afterwards). DCA(s) will also contribute to production of data documentation (outputs such as sampling plan, survey technical report, weighting report, data cleaning report).

3.2.3 Data management cycle

Research data management is a complex process that covers the entire life cycle of the research data, including planning and data collection (generation), quality evaluation, archiving and maintenance, analysis, and publication, as well as ensuring data is FAIR and accessible for reuse by third parties. Main elements of the data management process in TRUEDEM include:

1) Planning of the data collection. At this stage, PC, WPLs, and the QQSTG will work on the design of the new data collection tools for primary data collection, outlines identifying the types of data and sets of indicators, including potential data sources for secondary data to be collected / captured within the project research agenda. QQSTG, with the contribution of WP leaders and Coordinator, will be employed in the planning process related to the primary data collection (cluster C). QQSTG will produce all survey tools and related manuals in English, with each project partner responsible for localization and translation of the tools into their national language(s). The leaders of WPs 1, 2, 5, 6 will be in charge of the data capture guidelines for the production of newly processed and agglomerated research data (cluster B). Leaders of all research WPs will be responsible for providing guidelines on the various types of secondary data, including macro indicators, statistics, expert surveys etc. (cluster A), that project teams are required to collect (or cite) in their country-specific inputs for the project research deliverables.

2) Data collection, including update. Similar to the previous stage, data collection process is subdivided into the primary data collection and secondary data collection. Primary data collection will feature organization and implementation of a quantitative online population survey in 6-8 European countries to be conducted by sub-contracted DCA; a series of qualitative studies comprising 155 expert interviews with politicians and policymakers, 155 consultations with civil society organization leaders, 16 FGDs, and 26 policy workshops consultations with CSOs (deliberative discussions) to be conducted primarily by the project partners. Primary data collection will take place in Winter-Spring of 2024. Primary data will be captured through the online survey software

(to be proposed by DCA) and audio and video recording equipment for qualitative studies and workshops. All original records will be stored securely by the DCA and the project partners involved into the data collection. Anonymized quantitative dataset, anonymized transcripts of qualitative interviews and workshops (produced by the project teams with the automated transcription software Trint or manually) as well as their translations/ summaries in English (produced by project teams) will be submitted to the PC.

Secondary data collection will take place throughout the whole project cycle, following the schedule of production of research data and non-data deliverables. Secondary data collection will be conducted by every project partner, following the respective guidelines developed by the WP leader (see previous stage). Data in languages other than English will be translated by the responsible project team into English. Newly processed and agglomerated data requires regular updates to ensure it remains relevant; such updates will be made annually upon the first data release, and will be implemented by the project coordinator, with the support of the respective project teams responsible to perform the search and capture any secondary data necessary for the update.

3) Quality control, data cleaning, data merge. Tasks on ensuring high quality of the data, including data cleaning, will be primarily performed by the sub-contracted DCA as the quantitative data collector and project partners for qualitative primary data. Quality control over newly processed secondary databases will be assumed by the respective WP leaders. Finally, secondary checks on the quality of the data will be performed by the Coordinator and the Chair of the DAG. Data merging is required in case of secondary data being collected from several sources and will be performed by the respective WPLs, with the support of the PC.

4) Production of documentation, including metadata. Particular importance is attributed to the stage of data documentation production, because detailed, relevant and high-quality documentation is essential for the successful data dissemination and reuse. Depending on the type of documentation (i.e. pre-survey documentation or post-fieldwork technical documentation, metadata etc.), different project bodies will be involved into the documentation production. Primary data collection tools such as questionnaire, interview guide, guidelines for interviewers and project teams will be produced by the body in charge of the data collection design – the QQSTG, and overseen by the PC. Secondary data collection guidelines for the project teams will be produced by the respective WP leaders. Technical documentation and reports describing data collection process (sampling plan, methodology report, survey technical report) and data cleaning techniques (data cleaning report, data merge report, data anonymization report) will be produced by the units directly involved into the data collection (DCA or project teams). Documentation that will be released together with the databases (metadata, codebooks, variable reports, variables logs) will be produced by the Project Coordinator and the leaders of WPs 1, 2, 5, and 6. All documentation will be produced in English; metadata will be available in several formats, including the machine-readable formats as described in the previous sections.

5) Storage, backup, preservation, deletion. There are two different storage, backup, preservation, and deletion strategies are planned within TRUEDEM for a) publicly released research data and non-data outputs; b) sensitive research and non-research data. In addition, this process encompasses two phases: during project implementation (including storage space and backup procedures) and post-implementation phase/archiving (when the project is finished but all data must be stored). Data to be released as a part of public project deliverables will be stored securely

at the servers of the Project Coordinator, with the backup on both virtual cloud and national or EU data storage infrastructure. Data will be preserved till minimum of 5 years after the end of the project (2030). Upon the expiration of the project website in 2030, data will be deleted from the servers and will remain in backup copies (virtual cloud and national or EU data storage infrastructure). Sensitive data which release would lead to the breach of the national and European privacy protection legislation, including the GDPR, will be stored securely by every project partner (sensitive data from the primary data collection in their country, including audio and video recordings, original transcripts in national language) and the Project Coordinator (including both English translations of transcripts and sensitive non-research data such as lists of participants, contacts, stakeholders, names etc.) at their protected data archives. This data will not be exchanged within the consortium, will not be released in public access and will not be shared via repositories. This data will be stored till 2030 and destroyed after that. The tentative costs of the data preservation for the whole period are listed in the table below.

Table 6. Details on data preservation policy.

<i>Type of data</i>	<i>Preservation term (ends)</i>	<i>Related costs</i>
A. Pre-existing raw and processed data	2030	€ 300.00
B. Newly processed secondary data	2030	€ 800.00
C. Primary research data	2030	€ 1200.00
D. Ad-hoc research data	2030	€ 700.00
E. Non-research data	2030	€ 600.00

6) Data release, sharing, publication. Dissemination of the research data and non-data research outputs will be organized through several main channels. Research data will be made publicly available via a) the project website (www.truedem.eu); b) repositories, including Zenodo and national repositories of participating countries. The main project body in charge of the data release is the Project Coordinator, including the Chair of the DAG at the Coordinator. PC is responsible for the production and verification of the final set of materials that comprise the public deliverable (cleaned dataset, metadata, accompanying technical documentation etc.); publication of the data at the website (including prior submission to the European Commission), and submission of the data to the respective repositories, including creating the metadata, DOI etc. To facilitate dissemination and increase the data reuse by external users, WP leaders, all project partners, and in particular the members of the DCG will be encouraged to promote the research data via multiple communication channels (electronic, printed, conferences and events).

Release of the ad-hoc research data and syntax codes necessary to verify and validate the analytical procedures and calculations in journal articles and project reports will be a responsibility of both the Project Coordinator (via the project website) and the project partners or authors of the respective publications (via repositories).

Non-data research outputs will be made available in free public access a) at the project website (public deliverables, working papers, blog posts etc.); b) through publication in open access journals and special issues; c) through publication of books, book chapters, and collective monographs. Respective identifiers (whether DOI, ISSN, ISBN or else will be assigned). Same as with the public research data, non-data outputs will be disseminated by all project partners and especially the members of the DCG.

7) Ensuring data is FAIR. FAIR data are data which meet the principles of findability,

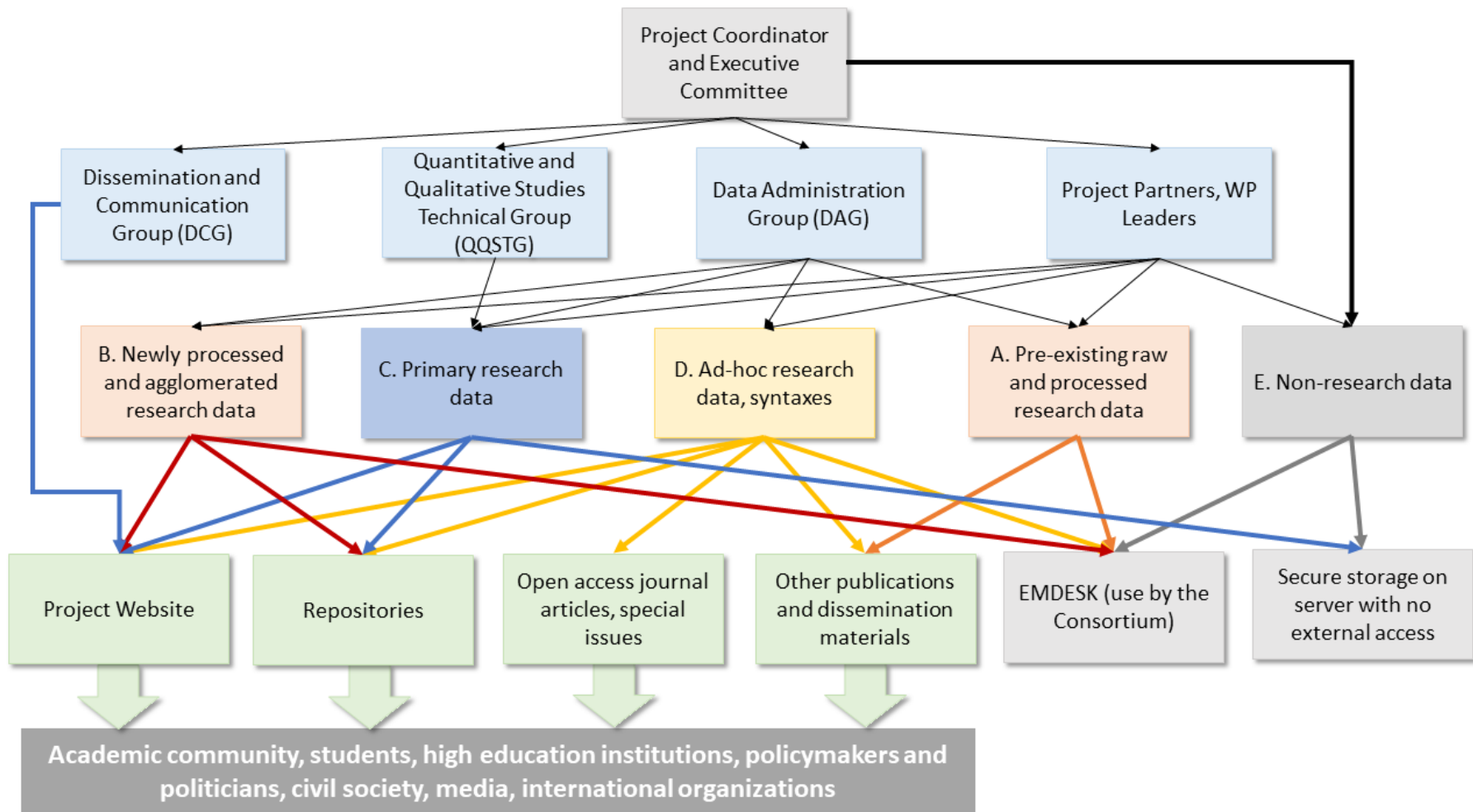
accessibility, interoperability, and reusability. Compliance with the FAIR data policy is among the main requirements of data management in Horizon projects, and a crucial factor that contributes to the advancement of scientific progress for the development of societies worldwide. Implementation of the principles of FAIR data production and distribution is a complex process with multiple stages and involves all project participants and bodies, contributing their part to making data easily findable and accessible, facilitating data interoperability and reusability, as described in the previous sections.

8) Production and update of DMP. The DMP (this document) as the main document regulating the data-related procedures (alongside with the Grant Agreement and respective European and national legislature) is at heart of the data management cycle. Drafting the DMP is conducted by the Project Coordinator as a part of WP12 on Project management, led by ICSR-AT. Further technical input is provided by the DAG, and country-specific input is further provided by the project partners. All project participants, project bodies, and subcontractors are required to comply with the DMP provisions.

Table 7. Data management bodies and procedures.

	Planning data collection	Data capture, data collection	Data update	Metadata production, documentation	Data cleaning, quality control	Storage, backup	Data preservation, deletion	Data sharing, publication	Writing, update of DMP	Implementation of DMP	Ensure data is FAIR
Data Administration Group (DAG): Chair at Coordinator					✓	✓	✓	✓	✓	✓	✓
Data Administration Group (DAG): Officers at Partners						✓	✓		✓	✓	✓
Project Coordinator	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Research WP leaders	✓			✓	✓			✓		✓	✓
Project partners		✓	✓							✓	✓
Dissemination and communication group (DCG)								✓		✓	✓
Quantitative and Qualitative Studies Technical Group (QQSTG)	✓			✓	✓					✓	✓
Data collection agency (sub-contractors) (DCA)		✓		✓	✓	✓	✓			✓	

Figure 3. Data Management cycle in TRUEDEM



4 Issues of data security

4.1 General notes on data security

Major provisions related to TRUEDEM data security, processing and protection, as well as IPR issues are described in project's Grant Agreement (Article 15, Article 16, as well as its Annex 5, which parts are quoted as an Annex to this Data Management Plan).

During the research project, all data will be stored on local servers maintained and automatically backed up by the partners responsible for the activities. Research organisations, working with the research data, in the project have facilities to comply with requirements to storage and access to research data. If necessary, these facilities may be used in a regional context (as defined in the DoA) by other partners who do not have these facilities.

Interview data will be gathered in a local context. Interviewers will upload audio files (of interviews) and text files of transcriptions at least once per working day to a secure data server. If in a remote rural context of a specific case study no workable safe connection to the server is available, this upload may be postponed a few days until such a connection is available or a safety copy needs to be created and stored on other location than where the original data is stored.

Only personnel working in the project has access to data files. Responsible for data access at each partner are the team leaders.

The coordinator will provide additional advice, as needed, on data management during the research project.

4.2 Sensitive data: Secured storage, archiving and transfer

The participating organisations in TRUEDEM are aware that research data management deserves ethical attention and are transparent about the way their research is done, and how data are handled. All data management will comply with applicable national and international law. The TRUEDEM partners will commit to following the principles described in the Personal Data Act (523/1999) and General Data Protection Regulation EU Directive 95/46/EC.

The policies for data-handling include aspects such as:

- Data safety procedures which are compliant with privacy by design and protection of confidentiality (including GDPR).
- Procedures for data collection, storage, protection, retention, transfer if any, destruction or reuse.
- Choice of data, sharing and ownership of data, choice of software.
- Use of methods when observing participants.

Subject information (i.e., personal identifiers) will be stored separately from their data. Researchers who want access to the data will be delivered spreadsheets. No spreadsheets will contain personal identifiers about any of the subjects (only subject numbers will be used as identifiers).

4.3 The issue of data transfer to the EU from non-EU countries and vice-versa (cases of Ukraine and Canada)

4.3.1 General provisions

The project envisions transfer or exchange of several specific data sets between the partners that are based in the EU countries and the two countries outside of the European Union, namely Ukraine and Canada.

The overall regulations on data transfer from the EU to third countries are quoted in the Text Box below.

Text box 1. EC's policy in regard to data transfers from the EU to a third country²⁷

- in the absence of an *Adequacy Decision*, a transfer can take place through the provision of appropriate safeguards and on condition that enforceable rights and effective legal remedies are available for individuals. Such appropriate safeguards include:
 - in the case of a group of undertakings, or groups of companies engaged in a joint economic activity, companies can transfer personal data based on so-called binding corporate rules;
 - contractual arrangements with the recipient of the personal data, using, for example, the standard contractual clauses approved by the European Commission;
 - adherence to a code of conduct or certification mechanism together with obtaining binding and enforceable commitments from the recipient to apply the appropriate safeguards to protect the transferred data.
- ... if a transfer of personal data is envisaged to a third country that isn't the subject of an Adequacy Decision and if appropriate safeguards are absent, a transfer can be made based on a number of derogations for specific situations for example, where an individual has explicitly consented to the proposed transfer after having been provided with all necessary information about the risks associated with the transfer.

The further specific arrangements for these two cases are described in the subsequent sections.

4.3.2 Project data exchange with Ukraine

4.3.2.1 General issues of the participation of a Ukrainian team in TRUEDEM project

The participation of a team from Ukraine (KKNU-UA) and the implementation of some work there poses a few formal issues related to ethics aspects, as well as the data transfer to and from the EU. The aspects related to the ethics are addressed in a separate document ("Ethics Plan", D12.3), while the issues of data management and data transfer are addressed in this sub-chapter.

Facts on Ukrainian participation in the project:

- Ukraine is an official associate country in all Horizon Europe program and hence the KKNU-UA team is a fully eligible partner (beneficiary) in TRUEDEM project and a signatory party of the project Grant Agreement. This implies that all provisions described in this document (Data Management Plan, D12.2) apply to KKNU team in full;
- Ukraine counts formally among the lower middle-income countries. However, due to its status of a HE associated country, this fact does not imply any specific obligations or limitations for the project in relation to the implementation of the research program and the accompanying activities, including the data and technology transfer;

²⁷ See https://commission.europa.eu/law/law-topic/data-protection/reform/rules-business-and-organisations/obligations/what-rules-apply-if-my-organisation-transfers-data-outside-eu_en

- In formal terms, Ukraine is not yet part of the GDPR convention, but its current legislation is quite close to its overall frameworks and the next legal steps are expected in the nearest future²⁸. Besides, for the time being Ukraine is not yet listed among the countries, for which the European Commission has issued an “Adequacy Decision” on GDPR compliance²⁹. These facts imply that certain additional measures and security reviews might be necessary to verify GDPR compliance of project data transfers to and from Ukraine. This verification will be managed by project’s steering bodies.
- Ukraine is in the state of war due to partial occupation by Russia since 2014 and especially the Russian armed invasion since February 2022. This poses some additional risk dimension with regard to the overall security for the project members, as well as specifically with regard to data protection. These issues will be administered as described in the previous bullet point.

4.3.2.2 Specific project-related issues of data transfer to and from Ukraine

There are no specific restrictions or limitations related to TRUEDEM data transfer to Ukraine, except the overall framework conditions quoted in the Text Box above.

As to the data transfer from Ukraine, there will be two policy workshops organized by the project partner in Ukraine, and the transcripts and translations will be used for analysis by KGNU-UA team and other consortium partners. The routine procedures for data anonymization and protection of personal data will be applied as described in this document (D12.2) and the Ethics Plan (D12.3). Due to only partial GDPR compliance of Ukraine, a special review of the related documentation (workshop TOR, including tools and reporting requirements) might be required, which will be subject to additional target reviews by project’s steering bodies as described above.

4.3.3 Project data exchange with Canada

4.3.3.1 General issues of the cooperation between the TRUEDEM project and the University of Montreal

In December 2023, the TRUEDEM research project established cooperation with the University of Montreal (UoM) aimed at joining the research effort in conducting a set of qualitative studies (4 focus group discussions) in Italy and joint analyses of the newly collected data. As a part of this cooperation, anonymized transcripts of FGDs will be shared with the team based at UoM.

While Canada is an official associate country in the Horizon Europe program, the UoM is not a member of the TRUEDEM consortium and shall act as a cooperation partner. The cooperation framework has been agreed in a written Memorandum, co-signed by the three parties (the TRUEDEM Consortium, the University of Salerno and the University of Montreal). In this cooperation, the parties adhere to the provisions and regulations of the TRUEDEM Consortium Agreement and TRUEDEM Grant Agreement.

4.3.3.2 Specific project-related issues of data transfer to Canada

In accordance with article 45 of Regulation (EU) 2016/679, a number of countries outside the European Union have been recognized by the European Commission as offering an adequate level

²⁸ See, for instance, <https://iuslaboris.com/insights/coming-soon-gdpr-like-privacy-regulation-in-ukraine/> and <https://secureprivacy.ai/blog/draft-law-of-ukraine-on-data-protection#:~:text=What%20is%20the%20primary%20law,and%20processing%20of%20personal%20data.>

²⁹ See, for instance https://commission.europa.eu/law/law-topic/data-protection/international-dimension-data-protection/adequacy-decisions_en

of data protection. The effect of these “adequacy decisions” is that personal data can flow from and to that third country without any further safeguard measures being necessary, and that the transfers to the country in question will be assimilated to intra-EU transmissions of data³⁰. Such an adequacy decision regarding Canada has been made by the European Commission in December 2001 (decision (2002/2/EC)) where the Commission recognized that “Canada is considered as providing an adequate level of protection for personal data transferred from the Community to recipients subject to the Personal Information Protection and Electronic Documents Act (“the Canadian Act”)³¹. Therefore, no restrictions are applicable to the data exchange between TRUEDEM project and the University of Montreal. In compliance with these provisions, anonymized transcripts of FGDs in the original language of interview shall be shared with the University of Montreal to facilitate the joint data analysis and publications between the two research groups.

5 Ethics of data management in TRUEDEM

The overall rules principles of ETHICS policy and management in TRUEDEM project are described in a separate document “Project Ethics Plan” (D12.3). The sub-chapters below specify the ethics aspects related specifically to Data Management.

5.1 Overview of ethics aspects

Transparency: TRUEDEM project framework ensures the collection, storage, protection, of data collected by research organizations or individuals, who will take part in the process of the project. Any breach or leak of data to irrelevant parties (e.g. supervisors, managers) may lead to transparency issues. To that end, TRUEDEM provides the necessary feedback in order to minimize the impact of that risk or any other similar. Furthermore, the Project in collaboration with platform coordinators will inform participants and relevant authorities on the details, the scope and the purposes of the data collection process in order to get an Ethical approval consent signed by them. In addition, the TRUEDEM ensures that data will be used only within the goals and objectives of the project. The goal of the project is not to use data for other reasons and this point will be also marked on the information content to be delivered on platform users.

Behaviour: The TRUEDEM consortium has taken into consideration the fact that some people may change their behaviour and/or their professional performance when they know that they are being interviewed. For that reason, the project’s purpose and intentions have been made perfectly clear to all participants. In addition, the selection of the participants is based mainly on their high interest and willingness to participate in the project, pointing out that the participation in the project does not result in more work for the involved end users. The ethical scope of the project has received significant consideration from the very beginning, and as the projects unfolds and evolves it will be one of the aspects that will guide all the procedures. The ethics of the TRUEDEM framework will be carefully treated throughout the lifecycle of the project so that ethical risks will be appropriately addressed.

³⁰ https://commission.europa.eu/law/law-topic/data-protection/international-dimension-data-protection/adequacy-decisions_en

³¹ <https://eur-lex.europa.eu/legal-content/en/TXT/?uri=CELEX%3A32002D0002>

5.2 Legal aspects of project data sharing

During this project, it is expected to interview human participants and therefore working with personal research data. Details of all the steps undertaken to ensure appropriate levels of data protection are outlined in the dedicated ethics section of the DoA and ethics deliverables.

During the process of transcribing the interviews, each partner will be responsible for de-identifying the human participants as much as possible. If full anonymization is not possible in the context provided, anonymization will be used. All the de-identification conditions and protection mechanism will be clarified in the consent form provided to all participants.

Besides, there are no other specific ethical or legal issues that can have an impact on data sharing. For details related to ethical aspects see the project's Ethics Guideline (D12.3) and the ethics chapter in the Description of the Action (DoA).

5.3 Issues of informed consent

Details regarding data sharing and long-term preservation are included in the questionnaire template dealing with personal data and in the informed consent. For details see deliverable D12.3 (Ethics guidelines)

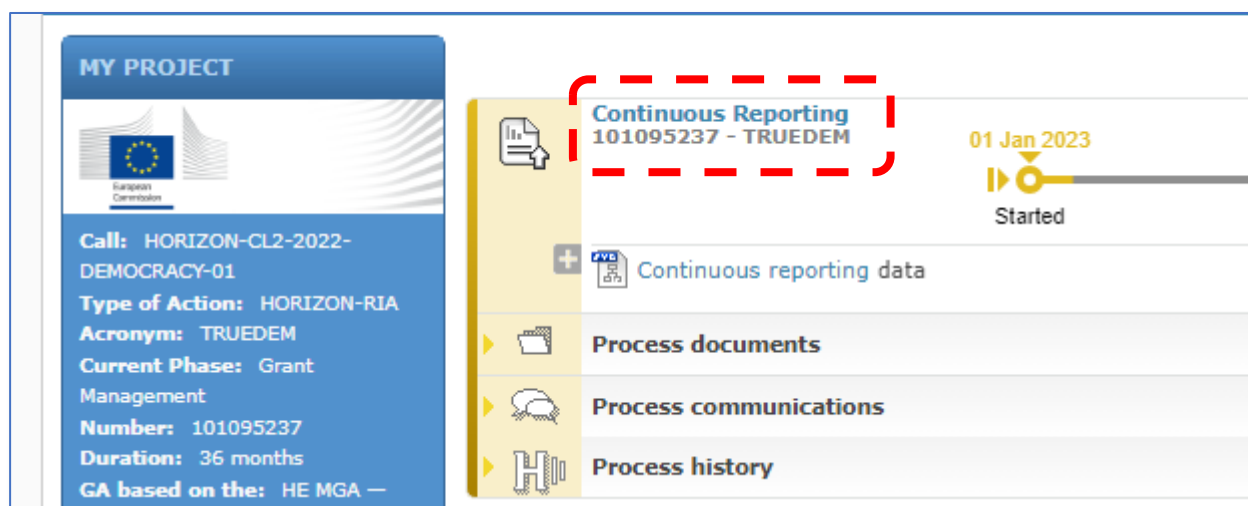
6 Continuous and periodic reporting of project data

On top of the above-described ways and means of project data collection, storage and dissemination, there are two major channels of formally prescribed reporting of project data on project management portal SyGMA. These channels stand for CONTINUOUS and PERIODIC (and FINAL) reporting, briefly outlined below.

6.1 Continuous reporting on Horizon Europe portal

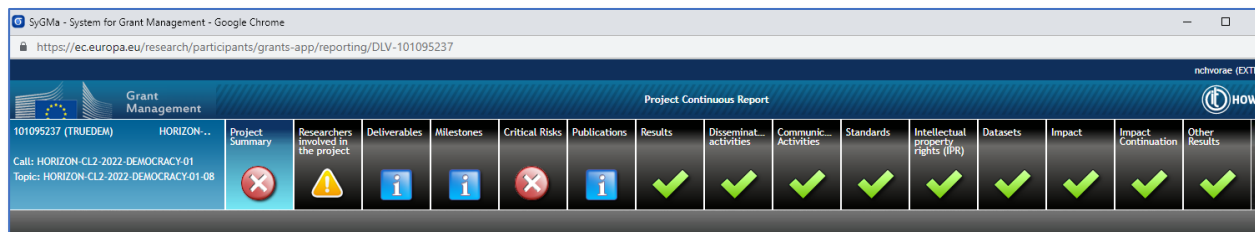
This section is accessible on the main interface of HE page for TRUEDEM as shown below.

Figure 4. Accessing the Continuous Reporting module



Once opened, one will see a number of tabs, where many research data can or must be reported (whether by the Coordinator, or each partner) as soon as these are produced or available – see the screenshot below.

Figure 5. Tabs in the Continuous Reporting module



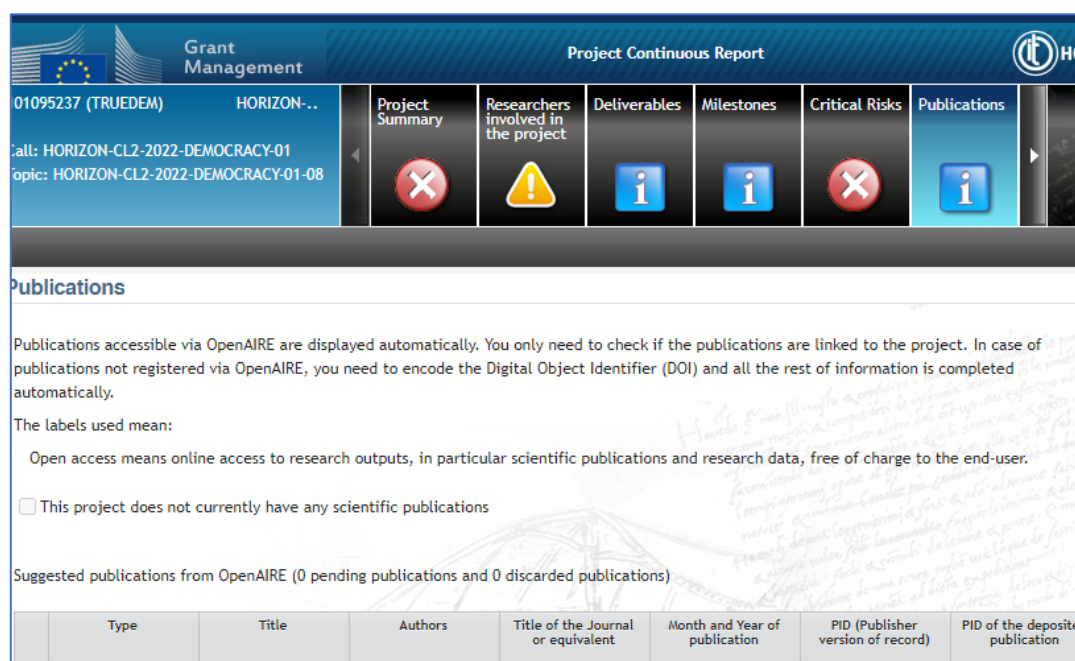
Inter alia, these tabs are:

- Deliverables
- Publications
- Dissemination activities
- Communication activities
- Standards
- Intellectual Property Rights (IPR)
- Datasets etc.

Note that many types and instances of project data will be automatically pre-filled in these reporting matrices via the OpenAire portal (www.openaire.eu), as well as such open platforms, as ORCID, etc.

However, each partner is encouraged to report their updates on the portal continuously, following the related instructions in these tabs. For instance, Figure 6 below shows the instructions and template for the reporting of project-related publications.

Figure 6. Continuous reporting: Publications



6.2 Periodic and Final Reporting

Once there will come the time for the formal Periodic reporting (starting from 01 January 2024) and the Final reporting (presumably on 01 January 2026), a specific reporting module will be opened by the Project Officer. It will contain multiple tabs as shown below (Figure 7); some of the tabs will be already pre-filled using the data reported earlier in the *continuous reporting* mode, assuming that certain missing bits will be added or complemented in the course of the formal reporting.

Inter alia, these tabs will include:

- Publications
- Standards
- Patents (IPR)
- Datasets

Some examples of the required reporting information are shown below.

Figure 7. Periodic reporting tabs: Publications and Data sets

Type of publication	Peer - review	Type of PID (repository)	PID of deposited publication (if no PID of publication)	Link to publication (if no PID of publication)	Title of the publication (for book chapters: title of chapter not of book)	PID of publisher version of record	ISSN/eISSN (if book insert ISBN)	Authors	Title of the journal or equivalent	Number of journal	Publisher	Month/ Year of publication	PID of book (if book chapter)	Book title (if book chapter)	Was the publication available in open access through the repository at the time of publication	Did you charge OA publishing fees to the project?	License type
Article in journal	[YES]	[DOI]	[insert reference]	[insert link]	[insert title of publication]	[insert reference]	[insert ISSN/eISSN number]	[insert author names]	[insert title of journal]	[insert number of journal]	[insert name of publisher]	[insert month of publication]	[insert PID reference]	[insert book title]	[YES][NO]	[YES][NO]	[CC BY or equivalent]
Publication in conference proceeding/Workshop	[NO]	[handle]															[CC BY NC or equivalent]
[Book/Monograph]		[URJ]															[CC BY NC or equivalent]
[Chapter in book]		[pURL]															[CC BY NC or equivalent]
[Thesis/Dissertation]		[Other]															[Other sciences]
[Other]		[None]															[Other sciences]

Management

Project Continuous Report

Project Summary | Resources involved in the project | Deliverables | Publications | Results | Dissemination activities | Standards | Patents (IPR) | Community Activities | **Datasets** | Infrastructure | Events and Trainings | Impact | Other Results

This project does not currently have any dataset

Suggested Datasets from OpenAIRE (3 pending datasets and 3 discarded datasets)

Include previously discarded datasets

	PID	Type of PID	Brief Description of Dataset	URL to Repository	Actions
1	10.11583/dta.14 10.11583/dta.14	DOI	Data for the figures of the article "Effect of ..."	https://doi.org/10.11583/dta.14	
2	10.17632/8f7338 10.17632/8f7338	DOI	"The Effect of ..."	https://doi.org/10.17632/8f7338	
3	10.17632/refab 10.17632/refab	DOI	"The Effect of ..."	https://doi.org/10.17632/refab	
4	10.5281/zenodo 10.5281/zenodo	DOI	"Simulation outputs, analysis scripts and figures used in the ..."	https://doi.org/10.5281/zenodo	
5	10.5281/zenodo 10.5281/zenodo	DOI	"Supplementary material associated to publication ..."	https://doi.org/10.5281/zenodo	
6	10.17632/8f7338 10.17632/8f7338	DOI	"The Effect of ..." data files (.a)	https://doi.org/10.17632/8f7338	

6.3 TRUEDEM data description form

Whenever research data is being produced or used in the project research and analysis, a form below should be completed to provide a record of the origin, purpose etc. of the data.

Title of the data	<i>Name of the dataset</i>
Owner	<i>Who is the producer/ responsible party for this dataset</i>
Source	<i>URL or physical address where the data came from</i>
Permission to use	<i>Free access, permission explicitly granted etc.</i>
Description	<i>Description of the type of data (survey, statistics, observations, list of political parties etc.)</i>
Time span	<i>Which time period the data refers to</i>
Geographical coverage	<i>Which countries the data is included for</i>
Format	<i>Csv, sav etc.</i>
WP	<i>Indicate the number of WP for which this data is being used</i>
Deliverable	<i>Indicator the number and name of the deliverable for which this data is being used</i>
Processing	<i>Describe in detail how the data was processed (i.e. indexes were created, reference to statistics, data processed and agglomerated into a new quantitative database etc.)</i>
Outputs	<i>Describe what are the final outputs where the data is used (a specific deliverable, academic publication, conference paper etc.)</i>
Repository	<i>Was the new dataset/ syntax shared via any repository, project website, publisher website or else?</i>
Metadata	<i>Was the metadata created? If applicable, summarize shortly.</i>
Documentation	<i>Was there any additional documentation created describing the new/ used data?</i>

ANNEXES

Grant Agreement: Data Protection and IPR issues

ARTICLE 15 — DATA PROTECTION

15.1 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.

15.2 Data processing by the beneficiaries

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 2016/679).

They must ensure that personal data is:

- processed lawfully, fairly and in a transparent manner in relation to the data subjects
- collected for specified, explicit and legitimate purposes and not further processed in a manner that is incompatible with those purposes
- adequate, relevant and limited to what is necessary in relation to the purposes for which they are processed
- accurate and, where necessary, kept up to date
- 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
- 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.

15.3 Consequences of non-compliance

If a beneficiary breaches any of its obligations under this Article, the grant may be reduced (see Article 28). Such breaches may also lead to other measures described in Chapter 5.

ARTICLE 16 — INTELLECTUAL PROPERTY RIGHTS (IPR) — BACKGROUND AND RESULTS — ACCESS RIGHTS AND RIGHTS OF USE

16.1 Background and access rights to background

The beneficiaries must give each other and the other participants access to the background identified as needed for implementing the action, subject to any specific rules in Annex 5.

‘Background’ means any data, know-how or information — whatever its form or nature (tangible or intangible), including any rights such as intellectual property rights — that is:

- (a) held by the beneficiaries before they acceded to the Agreement and
- (b) needed to implement the action or exploit the results.

If background is subject to rights of a third party, the beneficiary concerned must ensure that it is able to comply with its obligations under the Agreement.

16.2 Ownership of results

The granting authority does not obtain ownership of the results produced under the action. ‘Results’ means any tangible or intangible effect of the action, such as data, know-how or information, whatever its form or nature, whether or not it can be protected, as well as any rights attached to it, including intellectual property rights.

16.3 Rights of use of the granting authority on materials, documents and information received for policy, information, communication, dissemination and publicity purposes

The granting authority has the right to use non-sensitive information relating to the action and materials and documents received from the beneficiaries (notably summaries for publication, deliverables, as well as any other material, such as pictures or audio-visual material, in paper or electronic form) for policy, information, communication, dissemination and publicity purposes during the action or afterwards.

The right to use the beneficiaries’ materials, documents and information is granted in the form of a royalty-free, non-exclusive and irrevocable licence, which includes the following rights:

- (a) **use for its own purposes** (in particular, making them available to persons working for the granting authority or any other EU service (including institutions, bodies, offices, agencies, etc.) or EU Member State institution or body; copying or reproducing them in whole or in part, in unlimited numbers; and communication through press information services)
- (b) **distribution to the public** (in particular, publication as hard copies and in electronic or digital format, publication on the internet, as a downloadable or non-downloadable file, broadcasting by any channel, public display or presentation, communicating through press information services, or inclusion in widely accessible databases or indexes)
- (c) **editing or redrafting** (including shortening, summarising, inserting other elements (e.g. meta-data, legends, other graphic, visual, audio or text elements), extracting parts (e.g. audio or video files), dividing into parts, use in a compilation)
- (d) **translation**
- (e) **storage** in paper, electronic or other form
- (f) **archiving**, in line with applicable document-management rules

- (g) the right to authorise **third parties** to act on its behalf or sub-license to third parties the modes of use set out in Points (b), (c), (d) and (f), if needed for the information, communication and publicity activity of the granting authority
- (h) **processing**, analysing, aggregating the materials, documents and information received and **producing derivative works**.

The rights of use are granted for the whole duration of the industrial or intellectual property rights concerned.

If materials or documents are subject to moral rights or third party rights (including intellectual property rights or rights of natural persons on their image and voice), the beneficiaries must ensure that they comply with their obligations under this Agreement (in particular, by obtaining the necessary licences and authorisations from the rights holders concerned).

Where applicable, the granting authority will insert the following information:

“© – <year> – <name of the copyright owner>. All rights reserved. Licensed to the <name of granting authority> under conditions.”

16.4 Specific rules on IPR, results and background

Specific rules regarding intellectual property rights, results and background (if any) are set out in Annex 5.

16.5 Consequences of non-compliance

If a beneficiary breach any of its obligations under this Article, the grant may be reduced (see Article 28). Such a breach may also lead to other measures described in Chapter 5.

ANNEX 5 to the Grant Agreement

Definitions

Access rights — Rights to use results or background.

Dissemination — **The public disclosure of the results by appropriate means, other than resulting from protecting or exploiting the results, including by scientific publications in any medium.**

Exploit(ation) — The use of results in further research and innovation activities other than those covered by the action concerned, including among other things, commercial exploitation such as developing, creating, manufacturing and marketing a product or process, creating and providing a service, or in standardisation activities.

Fair and reasonable conditions — Appropriate conditions, including possible financial terms or royalty-free conditions, taking into account the specific circumstances of the request for access, for example the actual or potential value of the results or background to which access is requested and/or the scope, duration or other characteristics of the exploitation envisaged³².

³² Associated with document Ref. Ares (2022)8605443 - 12/12/2022

FAIR principles — ‘findability’, ‘accessibility’, ‘interoperability’ and ‘reusability’.

Open access — Online access to research outputs provided free of charge to the end-user.

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

Research data management — The process within the research lifecycle that includes the organisation, storage, preservation, security, quality assurance, allocation of persistent identifiers (PIDs) and rules and procedures for sharing of data including licensing.

Research outputs — Results to which access can be given in the form of scientific publications, data or other engineered results and processes such as software, algorithms, protocols, models, workflows and electronic notebooks.

Scope of the obligations: For this section, references to ‘beneficiary’ or ‘beneficiaries’ do not include affiliated entities (if any).

Agreement on background: The beneficiaries must identify in a written agreement the background as needed for implementing the action or for exploiting its results.

Where the call conditions restrict control due to strategic interests reasons, background that is subject to control or other restrictions by a country (or entity from a country) which is not one of the eligible countries or target countries set out in the call conditions and that impact the exploitation of the results (i.e. would make the exploitation of the results subject to control or restrictions) must not be used and must be explicitly excluded from it in the agreement on background — unless otherwise agreed with the granting authority.

Ownership of results: Results are owned by the beneficiaries that generate them. However, two or more beneficiaries own results jointly if:

- they have jointly generated them and
- it is not possible to:
- establish the respective contribution of each beneficiary, or
- separate them for the purpose of applying for, obtaining or maintaining their protection.

The joint owners must agree — in writing — on the allocation and terms of exercise of their joint ownership (**‘joint ownership agreement’**), to ensure compliance with their obligations under this Agreement.

Relevant provisions from GDPR

Article 5.1c: Personal data shall be adequate, relevant and limited to what is necessary in relation to the purposes for which they are processed (‘data minimisation’).

Article 5.1f: Personal data shall be processed in a manner that ensures appropriate security of the personal data, including protection against unauthorised or unlawful processing and against accidental loss, destruction or damage, using appropriate technical or organisational measures (‘integrity and confidentiality’).

Article 7.1: Where processing is based on consent, the controller shall be able to demonstrate that the data subject has consented to processing of his or her personal data.

Article 7.2: If the data subject’s consent is given in the context of a written declaration which also concerns other matters, the request for consent shall be presented in a manner which is clearly distinguishable from the other matters, in an intelligible and easily accessible form, using clear and plain language.

Article 9: Processing of personal data revealing racial or ethnic origin, political opinions, religious or philosophical beliefs, or trade union membership, and the processing of genetic data, biometric data for the purpose of uniquely identifying a natural person, data concerning health or data concerning a natural person’s sex life or sexual orientation shall be prohibited. Paragraph 1 shall not apply if one of the following applies: j) processing is necessary for archiving purposes in the public interest, scientific or historical research purposes or statistical purposes in accordance with [Article 89](#)(1) based on Union or Member State law which shall be proportionate to the aim pursued, respect the essence of the right to data protection and provide for suitable and specific measures to safeguard the fundamental rights and the interests of the data subject.

Article 89: 1. Processing for archiving purposes in the public interest, scientific or historical research purposes or statistical purposes, shall be subject to appropriate safeguards, in accordance with this Regulation, for the rights and freedoms of the data subject. Those safeguards shall ensure that technical and organisational measures are in place in particular in order to ensure respect for the principle of data minimisation. Those measures may include pseudonymisation provided that those purposes can be fulfilled in that manner. Where those purposes can be fulfilled by further processing which does not permit or no longer permits the identification of data subjects, those purposes shall be fulfilled in that manner.

2. Where personal data are processed for scientific or historical research purposes or statistical purposes, Union or Member State law may provide for derogations from the rights referred to in [Articles 15](#), [16](#), [18](#) and [21](#) subject to the conditions and safeguards referred to in paragraph 1 of this Article in so far as such rights are likely to render impossible or seriously impair the achievement of the specific purposes, and such derogations are necessary for the fulfilment of those purposes.

3. Where personal data are processed for archiving purposes in the public interest, Union or Member State law may provide for derogations from the rights referred to in [Articles 15](#), [16](#), [18](#), [19](#), [20](#) and [21](#) subject to the conditions and safeguards referred to in paragraph 1 of this Article in so far as such rights are likely to render impossible or seriously impair the achievement of the specific purposes, and such derogations are necessary for the fulfilment of those purposes.

4. Where processing referred to in paragraphs 2 and 3 serves at the same time another purpose, the derogations shall apply only to processing for the purposes referred to in those paragraphs.