



Data Management Plan-version 2

Deliverable 9.2

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List of Abbreviations

AC	Associated countries
CSA	Climate Smart Advisor
CSC	Climate Smart Coach
CoDIE	Co-Design Innovation Experiment
CoP	Community of Practice
CSF	Climate Smart Farming
DEC	Dissemination, Exploitation and Communication
DLA	Dynamic Learning Agenda
EC	European Commission
GA	General Assembly
GDPR	General Data Protection Regulation
HE	Horizon Europe
HTTP	Hypertext Transfer Protocol
MA	multi-actor
MIP	multi-actor innovation project
MS	Member states
NC	National coordinator
PA	Practice abstracts
PIP	Projects, flagship Initiatives and Policy makers
TL	Thematic Leader
TTT	Train the Trainer
URL	Uniform Resource Locators
WP	Work Package

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1 Abstract

This document presents the updated version of the Data Management Plan (DMP) for the ClimateSmartAdvisors project. The DMP provides a comprehensive framework for the management of all data generated, collected, reused, and processed throughout the project lifecycle. It outlines the procedures and principles applied to ensure that data are managed in accordance with the FAIR principle's findability, accessibility, interoperability, and reusability as well as relevant ethical and legal requirements.

In line with the Horizon Europe Open Access policy, the project promotes data reuse by making selected datasets and outputs available through the project website and recognised open repositories, accompanied by appropriate metadata to support transparency and understanding.

The scope of this document covers all categories of project data, including qualitative and quantitative datasets, monitoring and evaluation data, stakeholder engagement outputs, dissemination materials, and administrative records. For each category, the DMP describes the purpose of data collection, origin, formats, access conditions, security measures, and potential for reuse.

As a living document, the DMP is regularly reviewed and updated to reflect the evolution of project activities and data management practices. This iterative approach ensures continuous alignment with project needs, regulatory requirements, and good research data management practices, while accommodating the inclusion of newly identified datasets.

The preparation and update of this DMP follow the provisions of the Horizon Europe Model Grant Agreement, ensuring that all beneficiaries implement consistent and robust data management procedures across the consortium.

2 Introduction

In ClimateSmartAdvisors, advisors are recognised as being in a key position in developing and sharing climate smart (CS) innovations and good practices between peers and with farmers. Therefore, ClimateSmartAdvisors works on improving the opportunities, knowledge, and skills of agricultural advisors to support farmers in the implementation of climate change mitigation and adaption actions across Europe. The project aims to boost the role of agricultural advisors and advisory service providers (ASP) by strengthening their capacity in providing targeted advice on climate mitigation and adaptation approaches, and by sharing solutions for impactful advisory methods. By boosting the role of the EU agricultural advisory community, we aim to contribute to an acceleration of the adoption of climate smart farming (CSF) practices by the wider farming community within and across EU Agricultural Knowledge and Innovation Systems (AKISs).

The objective of this update is to provide a consolidated overview of data management practices, ensuring alignment with Horizon Europe requirements and the FAIR principles (Findable, Accessible, Interoperable, and Reusable). The update covers both data generation and data processing activities carried out across the Work Packages, including stakeholder registration and participation records, survey data, monitoring and evaluation inputs, training-related datasets, dissemination materials, and administrative records. It also clarifies how data flows are managed in practice, which partners are responsible for different categories of data, and how access, retention, anonymisation and reuse are handled in line with the FAIR principles, Horizon Europe requirements and the General Data Protection Regulation (GDPR).

Since the previous version of the DMP, the project has expanded its data collection activities, particularly through stakeholder engagement processes, surveys, workshops, advisory practice documentation, dissemination outputs, and monitoring activities. These developments required a more detailed description of datasets and clarification of data flows across Work Packages.

The DMP applies to all data generated or reused within the project, including qualitative and quantitative datasets, audiovisual materials, communication outputs, administrative and coordination data, and digital platform content.

This updated version confirms that the project continues to operate within a low-risk data management environment, with appropriate technical and organisational measures in place to ensure data integrity, confidentiality, and compliance with applicable regulations. It consolidates inputs from Work Package questionnaires and confirms that no substantial changes in data management procedures have occurred since the previous version.

Since the first version of the Data Management Plan, several operational aspects of data management have been further consolidated. Dataset descriptions across Work Packages were updated based on dedicated WP questionnaires, ensuring consistent documentation of data types, collection methods, and expected outputs. In parallel, the project Backoffice environment has been fully operationalised to support the monitoring of Communities of Practice, training activities, and stakeholder engagement events. These developments improve traceability of project activities and provide a clearer overview of the data flows generated across the project lifecycle.

The present Data Management Plan therefore addresses the following key aspects of data management within the project:

- types of data that are and will be generated, collected or reused during the project
- standards and formats applied to ensure interoperability of datasets



- procedures for storing, protecting, backing up and securing project data
- access conditions and reuse of project outputs
- responsibilities related to data governance and management within the consortium
- procedures supporting FAIR data principles (Findable, Accessible, Interoperable and Reusable)
- long-term preservation and retention of project data after the end of the project

3 Data summary (consolidated across WPs)

3.1 Types of data generated and collected

ClimateSmartAdvisors generates and processes a diverse set of data types reflecting its coordination, stakeholder engagement, knowledge exchange, and dissemination activities.

Across Work Packages, the main categories of data include:

- **Textual data**
Reports, meeting minutes, workshop outputs, survey responses, training materials, policy inputs, practice descriptions, transcripts, and internal coordination documents.
- **Numeric and structured data**
Project monitoring data, including participation data from training activities and events, Communities of Practice engagement data, survey-based evaluation results, AKIS analysis inputs, and project monitoring tables.
- **Audiovisual data**
Photos, videos, recordings of workshops and events, webinars, interviews, and other dissemination materials.
- **Digital platform and database content**
Entries in the project Backoffice, platform databases, website content, and structured repositories supporting project activities.
- **Administrative and coordination data**
Operational and reporting data related to project management, stakeholder engagement, and coordination.

These datasets are primarily digitally generated and stored in commonly used formats, such as DOCX, PDF, XLS/XLSX, CSV, MP4, JPG/PNG, and web-based formats.

3.2 Purpose of data collection

Data collected and generated within the project serve several interconnected purposes:

- monitoring and evaluation of project activities and impacts
- supporting knowledge exchange and learning processes within the advisory community
- documenting stakeholder engagement and network activities
- enabling analysis of advisory systems, needs, gaps, and opportunities
- supporting dissemination, communication, and exploitation of project results
- providing evidence for deliverables, milestones, and reporting obligations

The collection and analysis of project data support the overall objective of strengthening climate smart advisory services across Europe. Data gathered through surveys, workshops, Communities of Practice activities and stakeholder engagement activities contribute to the identification of knowledge gaps, training needs and innovation opportunities within advisory systems. These insights help inform project activities, improve knowledge exchange among advisors and support the development of practical tools and guidance for climate smart farming advisory services.

Once collected, datasets are reviewed and organised by the responsible Work Package partners to ensure consistency and completeness. Documentation accompanying the datasets, including

contextual information and methodological notes, is maintained to facilitate interpretation and potential reuse within the consortium.

Where relevant, collected data may be aggregated or synthesised to support project analyses, reporting activities and the development of knowledge outputs such as guidelines, training materials and policy recommendations.

3.3 Data origin

The project relies primarily on **primary data**, collected directly through project activities such as surveys, workshops, consultations, interviews, training sessions, and digital platform interactions.

In some Work Packages, **secondary data** is also used, including existing reports, literature, policy documents, and external datasets relevant to climate-smart advisory systems.

In addition, data stored within the project platforms (website and Backoffice) are contributed by multiple Work Packages, reflecting the distributed nature of data generation within the project. Project information and data inputs are also derived from the Grant Agreement and project documentation, ensuring consistency between contractual obligations and operational data management.

3.4 Data size

Most datasets generated within the project are relatively small to medium in size, reflecting the coordination and support nature of the action.

Typical datasets include:

- survey and monitoring datasets (generally below 100 MB)
- textual and administrative documents (small size)
- audiovisual materials and digital dissemination outputs (medium to large size)
- platform-related datasets and Backoffice content (potentially larger cumulative size)

Overall, data volumes remain manageable and compatible with standard institutional storage solutions.

3.5 Data utility and potential reuse

Project data provide value both within and beyond the consortium.

Internally, datasets support monitoring, evaluation, coordination, and knowledge sharing across Work Packages.

Externally, selected datasets and outputs, particularly aggregated data, good practices, dissemination materials, and analytical results may be reused by:

- agricultural advisors and advisory organisations
- researchers and innovation actors
- policy makers
- EU and national initiatives
- other projects and networks

Data reuse is facilitated where appropriate through open access dissemination channels, while respecting confidentiality and ethical constraints.

A detailed overview of the datasets and data sources across Work Packages is provided in *Annex 1*.

4 FAIR Data

The ClimateSmartAdvisors project applies the FAIR principles (Findable, Accessible, Interoperable and Reusable) as a guiding framework for managing data throughout its lifecycle. The project recognises that not all datasets can be openly shared due to confidentiality or personal data considerations; however, all data are managed in a way that maximises their usability, transparency, and long-term value. The operational environment supporting data storage and collaboration is described in Section 5, providing the technical context for the implementation of the FAIR principles.

4.1 Making data findable, including provisions for metadata

Data generated within the project are systematically documented and organised to ensure that they can be easily located and identified.

Datasets are primarily stored in one main structured project repository (the project SharePoint/Teams environment) and one main collaboration platform (a dedicated CSA Backoffice platform, integrated in the project website). These Sharepoint/Teams repository uses predefined folder structures aligned with the overall organisation of the project (CSA network vs. CSA management, dedicated Work Package folders), as well as additional clustering according to user groups (e.g. National Coordinators, Management Team, Work Package teams) in order to facilitate ease of access and navigation. File naming conventions - that typically include the Work Package, activity type, short title, version and/or date where relevant – have been agreed within the consortium to support traceability, version control and consistent documentation of project outputs.

The Backoffice complements this structure by hosting structured records related to project implementation, including Communities of Practice, training activities, event registration and participation data, and other operational entries. In this way, project data are not only stored as documents but also captured as structured records linked to specific project activities.

For datasets intended for public dissemination, metadata is provided through the project website and, where relevant, through open repositories such as [Zenodo](#). In addition, the overview of datasets generated across Work Packages is documented in *Annex 1* of this DMP, which serves as a reference for dataset types, formats and purposes. Discoverability is further supported through the ClimateSmartAdvisors Zenodo community, the project website and, where relevant, the Farming for Climate platform.

In addition, selected datasets and outputs are referenced through project deliverables, practice abstracts and publicly available knowledge resources, ensuring their visibility and accessibility for the wider advisory community, including advisors, AKIS actors, researchers and policy stakeholders. Keywords and controlled vocabularies related to climate-smart farming, advisory services and AKIS are used where appropriate to further improve discoverability.

Each dataset is accompanied by descriptive metadata, including information on dataset title and description, responsible Work Package and partner, date of creation, format and version, purpose and context of collection, access conditions, and applicable licences where relevant. This approach is already in use and is being further refined to ensure a more consistent and structured description of datasets across the project.

To support this, the Management Team will set up a structured overview file by June 2026 containing core metadata for the main datasets generated across Work Packages, including dataset title, WP, responsible partner, type of data, format, access level, storage location and reuse potential. This metadata overview will be updated regularly, every 9 months in alignment with project's KPI reporting cycle.

4.2 Making data accessible

Access to data is managed through a tiered approach, ensuring that information is available to relevant stakeholders while respecting confidentiality, intellectual property rights, and data protection requirements. ClimateSmartAdvisors ensures open access as set out in the Grant Agreement specifically in Article 1.1.2.

Access to project data is further governed by the provisions of the Consortium Agreement (DESCA), which defines data ownership, access rights and conditions for data sharing among partners.

4.2.1 Openly available data

The following types of data are made openly accessible:

- public deliverables and reports
- practice descriptions and knowledge resources
- dissemination and communication materials
- aggregated or anonymised analytical results

These datasets are shared via the project website, publications, and open access repositories where appropriate, in particular through the ClimateSmartAdvisors community on [Zenodo](#), which serves as the main open repository for public deliverables and selected public outputs and ensures long-term accessibility through persistent identifiers.

4.2.2 Restricted access data

Certain datasets are accessible only to authorised consortium members or specific stakeholders. These include:

- internal coordination and milestone documents
- raw survey responses
- monitoring datasets containing identifiable information
- Backoffice and platform data

Sensitive or personal data are not made publicly available. Such data are stored in controlled environments used by the consortium, primarily the project SharePoint/Teams environment, the CSA Backoffice hosted on BioSense-managed infrastructure, and, where relevant, secure institutional systems of the responsible partner organisation. Access to these environments is limited to authorised users on the basis of role and task necessity and is managed through institutional authentication and role-based permissions.

For the project Backoffice platform, access is restricted to authorised consortium users. The Backoffice is used to support key project operations, including Communities of Practice (CoPs) registration and management, event registration and monitoring, user management, and KPI generation and evaluation.

The data processed within the Backoffice may include personal data (e.g. names, email addresses, organisational affiliation), where necessary to ensure the organisation, traceability and ownership of project activities (e.g. identification of CoP leaders, trainers, or event participants). Access to such data is restricted and managed in accordance with the project's data protection and access control procedures.

Access to these datasets is granted to authorised users within the consortium in accordance with their roles and responsibilities within the project. The Backoffice system enables differentiated access levels depending on user roles (e.g. National Coordinators, Thematic Leaders, Climate Smart Coaches and other registered users). While most users can access and contribute to core functionalities such as event and Community of Practice management, access to specific data categories (e.g. KPI-related data) is restricted to designated roles. This role-based approach ensures that data are accessible for coordination and implementation purposes, while maintaining appropriate control over sensitive or monitoring-related information. Personal data are anonymised or aggregated before wider internal sharing or public dissemination wherever possible.

Requests for access to restricted datasets are assessed by the data-owning or data-responsible partner. Where relevant, the responsible Work Package leader may be consulted to ensure alignment with project activities. The assessment considers the purpose of the request, the presence of personal or confidential information, applicable consent conditions, and GDPR and consortium obligations. In cases of uncertainty or where additional guidance is required, the request may be discussed with the project coordination team or, if needed, with the relevant institutional data protection or ethics contact.

4.2.3 Methods and tools needed to access the data

Data are stored in widely used and non-proprietary formats where possible (e.g. PDF, CSV, TXT, MP4), ensuring that no specialised tools are required beyond commonly available software.

Where specific tools or platforms are needed (e.g. project Backoffice), access is provided and managed by the responsible partners, with guidance available through project documentation and coordination support where needed.

4.2.4 Access provisions for sensitive data

Access to sensitive data is managed through the project's established governance and access control mechanisms implemented within the SharePoint/Teams environment and the CSA Backoffice platform. Access conditions are defined by the responsible partner and applied through role-based permissions and coordination procedures (e.g. user role assignment, access updates and validation of access rights). Access is granted only where there is a clear project-related purpose and in line with defined roles and responsibilities within the consortium. Where relevant, additional safeguards are applied, including anonymisation or aggregation of data prior to sharing, as well as restricted access settings to ensure that sensitive information is handled appropriately.

4.3 Making data interoperable

Interoperability is supported through the use of standardised formats, shared definitions, and consistent documentation practices across Work Packages.

Whenever feasible, data are stored in formats that allow integration with other datasets and tools (e.g. CSV, XLSX, structured databases).

Common terminology related to climate-smart advisory, AKIS, and stakeholder engagement is applied across datasets to ensure conceptual consistency.

Where relevant, datasets are structured in a way that facilitates cross-country comparison and integration with data from related initiatives or projects.

Where project data or outputs are shared with other projects or initiatives, this is done only for data categories that are suitable for such exchange, typically public outputs, aggregated results, methodological resources or anonymised materials. Any sharing of non-public information is subject to prior assessment by the responsible partner and project coordination and is limited to cases where there is a clear project-related purpose, an appropriate legal basis, and no conflict with confidentiality, consent conditions or data protection rules.

This is particularly relevant for cross-country comparison and aggregation of data collected through Communities of Practice, training activities and advisory system analyses.

4.4 Increasing data reuse

The project aims to maximise the potential for reuse of its data while ensuring compliance with ethical and legal requirements.

Particular attention is given to datasets and outputs that can support future advisory initiatives and knowledge exchange within the AKIS ecosystem. Aggregated results, methodological approaches, training materials, and advisory practice descriptions developed within the project may therefore serve as reference resources for related initiatives, and advisory organisations working on climate-smart farming.

4.4.1 Data licences

Publicly shared data and outputs are typically released under open licences (e.g. Creative Commons) where appropriate, enabling reuse with proper attribution.

For datasets where open licensing is not possible due to confidentiality or personal data considerations, reuse is limited to aggregated or anonymised forms.

4.4.2 Data reuse potential

Datasets generated within the project can be reused for:

- further research and analysis
- policy development
- advisory service improvement
- training and capacity-building activities
- cross-project knowledge exchange

Project public outputs (e.g. reports, guidelines, practice abstracts, training materials and communication content) are and will be made available in line with Horizon Europe open access requirements. Where applicable, materials are shared under a Creative Commons licence (e.g. CC-BY), unless restrictions related to confidentiality or personal data apply.

Public deliverables and communication materials remain accessible through the project website and the Zenodo repository for at least five years after the end of the project, supporting transparency and knowledge uptake.

4.4.3 Dissemination and access to public outputs

Project results intended for public use, including reports, guidelines, practice abstracts, training materials and communication content, will be disseminated through the project website www.climatesmartadvisors.eu, the Farming for Climate platform <https://farmingforclimate.eu>, events and workshops, as well as project social media channels (e.g. LinkedIn, X, Facebook). In addition, audiovisual content is shared through a joint YouTube channel developed in collaboration with the sister project Climate Farm Demo, enabling wider visibility and reuse of video-based materials across related initiatives.

The Farming for Climate platform provides a dedicated knowledge-sharing environment where project outputs, practices and learning materials can be accessed by advisors, farmers and other AKIS stakeholders, while social media channels support broader outreach and engagement by enabling timely sharing of project results and activities. This combined approach ensures that knowledge generated within the project is both accessible and actively circulated within the wider climate-smart advisory ecosystem.

Where appropriate, selected outputs will also be made available through established repositories such as Zenodo or partner platforms, supporting visibility, transparency and further uptake of project results beyond the consortium. Persistent identifiers assigned through repositories such as Zenodo facilitate citation, discoverability and reuse of project outputs by the wider research and innovation community. Dissemination activities are designed to maximise accessibility while respecting confidentiality and data protection requirements.

Through this approach, the project contributes to knowledge exchange and capacity building, ensuring that publicly available information remains accessible and usable for the wider community.

4.4.4 Long-term preservation

Key project outputs, including deliverables and knowledge resources, will remain accessible through the project website and institutional repositories beyond the project lifetime.

Partners are responsible for ensuring that data of long-term value are preserved in line with institutional data retention policies.

4.4.5 Data quality control

Quality assurance is implemented through practical checks carried out by the responsible partners before data are used for analysis, reporting or dissemination.

Quality assurance measures include:

- review of datasets and related documentation by the responsible Work Package partners before use in analysis or inclusion in project deliverables
- validation of survey and monitoring data through checks for completeness, duplicate entries, inconsistencies and obvious errors prior to analysis and reporting

- cross-checking of information collected through different project activities (e.g. surveys, training participation records, Communities of Practice engagement data and monitoring tables) in order to align records and avoid duplication or inconsistencies
- version control and documentation through the project SharePoint environment, where updated versions of datasets and documents are stored with version history and controlled access

4.5 Data security

The project implements appropriate technical and organisational measures to ensure the security and integrity of data.

4.5.1 Secure storage and backup

Project data are stored in several controlled environments, depending on their function and level of sensitivity. Internal working documents, draft deliverables, meeting records, reporting files and shared datasets are primarily stored in the project SharePoint/Teams environment, which provides institutional authentication, controlled user permissions, version history and standard Microsoft security and backup features available through the organisations' licensed environment.

Building on the arrangements described in the initial DMP, continue to be stored within secure institutional environments provided by partner organisations. In particular, the infrastructure operated by the BioSense Institute (i.e. the project website and the Backoffice) supports the project through established procedures for access management, routine backup and compliance with institutional data protection and information security frameworks.

The infrastructure operates within the research data management environment of the BioSense Institute and the University of Novi Sad, providing reliable storage architecture, controlled access mechanisms and institutional backup procedures designed to ensure the integrity and availability of project datasets.

Virtual access to servers and databases is restricted and secured using SSH (Secure Shell) protocols, with authentication based on SSH keys and access limited to authorised IP addresses. Communication between web browsers and servers is encrypted using HTTPS protocols with TLS certification (Let's Encrypt), ensuring secure data transmission.

Access to the WordPress management environment is restricted to the BioSense internal network or via secure VPN connections approved by the BioSense security team. These measures ensure that only authorised users can access and manage website content and related data.

Additional protection measures include server-side encryption, ensuring that stored data remain protected even in the event of unauthorised access. Access to data is limited to authorised personnel, and encryption mechanisms prevent data from being readable without appropriate credentials.

The implementation and oversight of these security measures are ensured by the responsible partner managing the infrastructure, in coordination with the project coordination team and institutional IT and data protection procedures.

An illustrative overview of the institutional storage architecture supporting secure data management is presented in Figure 4.

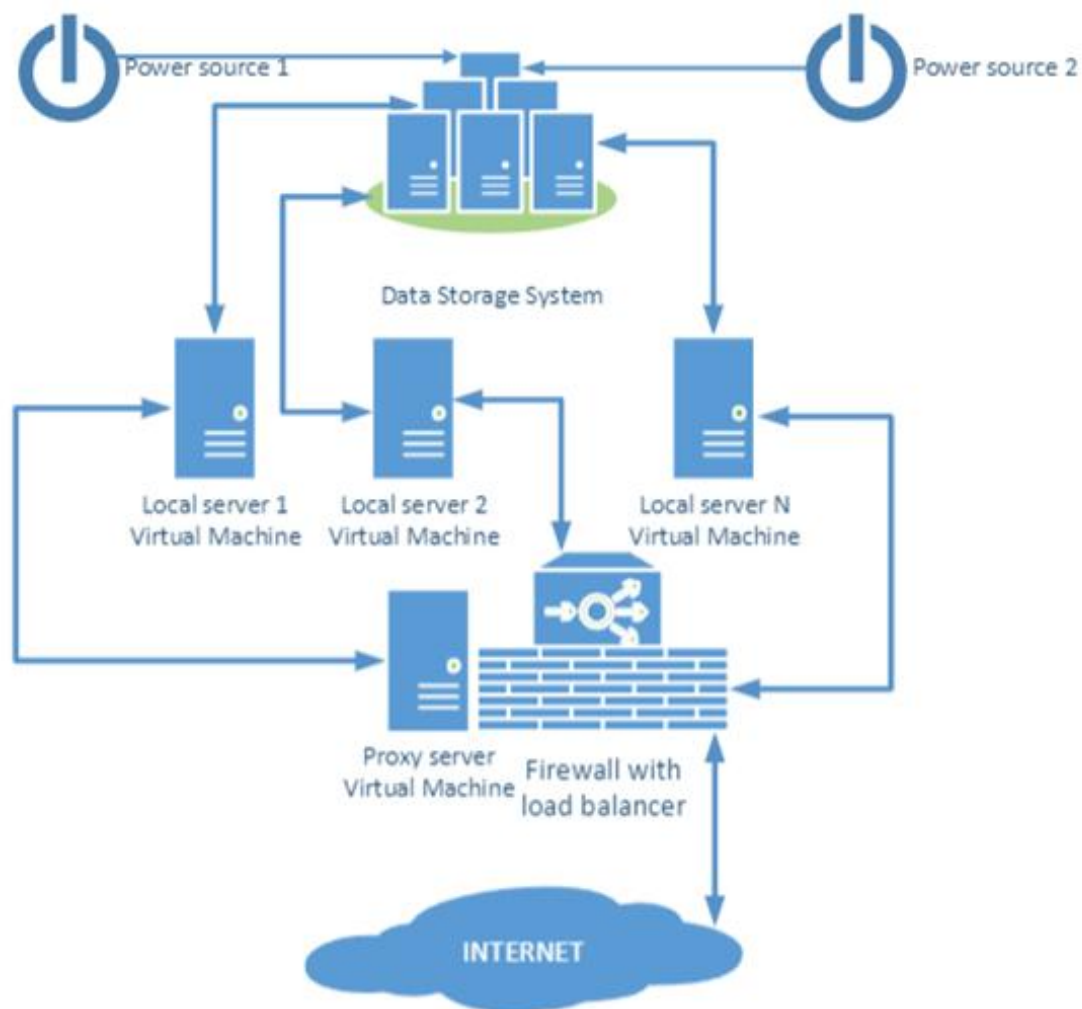


Figure 1 Institutional storage architecture

4.5.2 Transfer of data

Data exchanges within the consortium are carried out through secure channels and controlled collaboration platforms, such as the project SharePoint environment and Backoffice system. Access to shared files and datasets is restricted to authorised users through institutional authentication mechanisms and role-based permissions. Where relevant, access rights are aligned with user roles and responsibilities and updated through coordination procedures to reflect changes in project involvement.

Where personal data are involved, transfers comply with the General Data Protection Regulation (GDPR) and the internal data protection policies of partner organisations. Encryption and secure file transfer methods are used where necessary to ensure that sensitive information remains protected during transmission.

5 Data management infrastructure

This section describes the practical implementation of the data management approach outlined in the previous section. In ClimateSmartAdvisors, this implementation relies on a combination of internal collaboration environments for restricted and operational data, and public dissemination environments for open outputs.

To support day-to-day coordination and ensure consistent handling of project data, ClimateSmartAdvisors uses a structured digital collaboration environment combining a project platform (the before mentioned Backoffice environment) and a document repository (using Microsoft SharePoint/Teams). This infrastructure enables partners to access shared resources, manage activities, and store project documentation in an organised and secure manner.

The project makes use of several technical components and service providers supporting data processing and storage activities, including the WordPress website management platform (with Elementor plugin), the Backoffice application developed using Angular framework, and a MongoDB database for structured data storage.

These systems are hosted and managed within the BioSense infrastructure or under controlled environments and are used exclusively for project-related data processing. The use of such tools is aligned with institutional data protection procedures and applicable GDPR requirements.

The project relies on third-party service providers acting as data processors (e.g. mailing platforms such as Mailchimp, website analytics tools, or survey tools). In such cases, data processing is carried out in accordance with GDPR requirements and is governed by data processing agreements (DPAs) or equivalent contractual arrangements established by the responsible partner organisation. The responsibility for ensuring compliance with these obligations lies with the partner using the respective service, in line with their institutional data protection procedures.

The Backoffice environment provides a central entry point for users, facilitating navigation across key functional areas such as roles, events, monitoring, and knowledge resources, while the SharePoint document repository supports document management, version control and controlled access to project resources. This environment ensures that all partners can securely access relevant information while maintaining appropriate governance procedures.

Figures 2, 3 and 4 illustrate the main components of both environments and provide an overview of how project information is organised and accessed in practice.

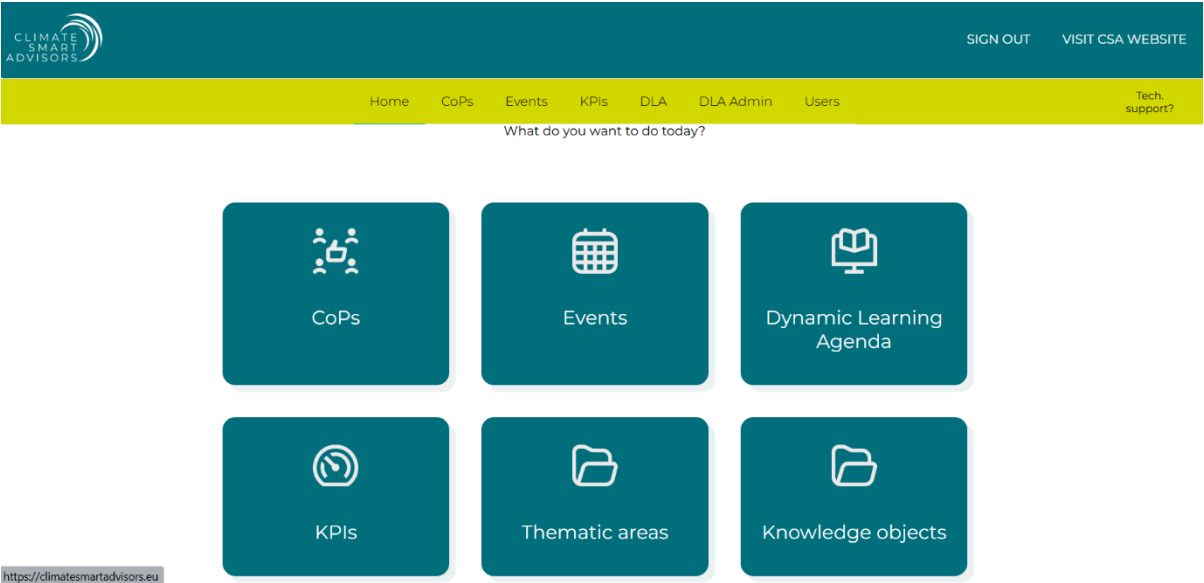


Figure 2 Backoffice Dashboard

Within the Backoffice environment, user roles and access permissions are clearly defined, enabling differentiated access to documents and ensuring that data is only available to authorised users. The definition of roles, access levels and related processes is documented in the project’s internal governance and operational guidelines (e.g. Backoffice user management settings and project coordination procedures), and is managed by the coordination team. This role-based structure and access permissions contributes to data security and efficient collaboration across the consortium.

The Backoffice environment is used to record and manage several operational datasets generated during the project implementation. These include participation records for Communities of Practice, various training activities, and documentation of stakeholder engagement events. The platform supports structured data entry, documentation and evaluation of activities, and monitoring of participation, thereby contributing to transparency and traceability of project implementation.

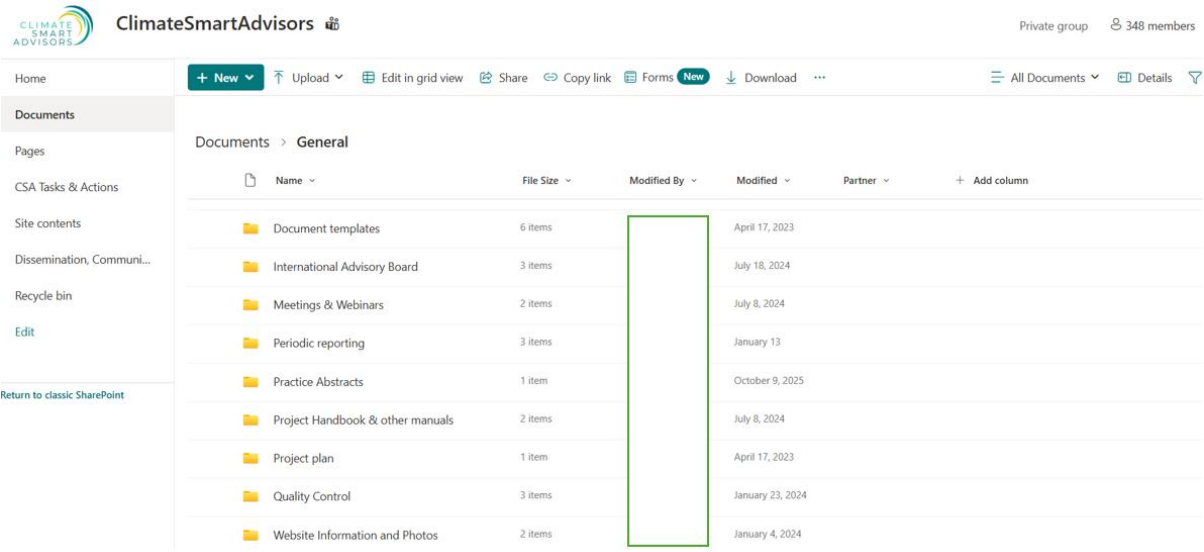


Figure 3 Folder Structure

The structured folder system provides a clear organisation of project documentation and datasets, facilitating traceability, version management and long-term storage. This structure supports the implementation of the data governance principles outlined in this DMP.

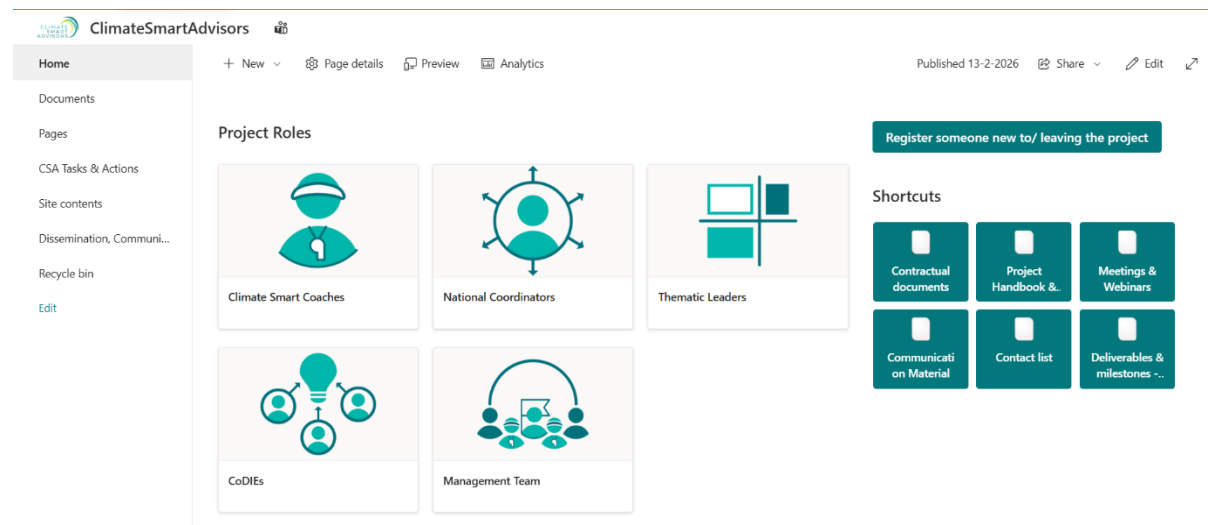


Figure 4 Overview of the SharePoint home interface supporting navigation and access to project resources

The combination of both environments enables the practical implementation of the data governance framework described in *Section 4* of this DMP, reinforcing transparency, security and consistency in data handling across the project.

6 Ethics

To improve consistency across Work Packages, the project applies a common interpretation of key ethical procedures related to informed consent, personal data processing, storage of consent records, anonymisation and public use of audiovisual materials, while allowing context-specific implementation by the responsible partners.

Ethical considerations are an integral component of the ClimateSmartAdvisors data management framework. All activities involving data collection, processing, storage, and sharing are carried out in compliance with applicable European and national regulations, including the General Data Protection Regulation (GDPR) and the Horizon Europe ethics requirements.

This section provides a concise overview of ethical principles relevant to data management, while detailed procedures and safeguards are described in the project's dedicated ethics deliverables.

An overview of ethical procedures applied across Work Packages is presented in *Annex 2*.

6.1 Ethical framework

The project operates within a low ethical risk environment, as activities primarily involve professional stakeholders such as advisors, farmers, researchers, and policy actors, and do not include interventions affecting participants' physical or psychological integrity.

Ethical considerations are embedded in project governance and operational procedures, ensuring that data are collected and processed responsibly, transparently, and proportionately.

All partners are required to comply with their institutional ethical guidelines and applicable legal frameworks when collecting or processing data.

6.2 Involvement of human participants

A significant part of project data is generated through stakeholder engagement activities, including workshops, consultations, surveys, interviews, and training sessions.

Participation in these activities is voluntary and based on clear and accessible information regarding:

- the purpose of the activity
- the type of data collected
- how the data will be used
- participants' rights, including the right to withdraw

Where necessary, informed consent is obtained using standardised templates adapted to the context of each activity.

The project ensures that participants are treated in accordance with the principles of respect, fairness, and transparency, and that engagement activities are conducted in a professional and non-intrusive manner.

6.3 Protection of personal data

Personal data processing within the project is limited to what is necessary for coordination, stakeholder engagement, dissemination, and reporting activities.

Typical personal data include:

- professional contact details
- organisational affiliations
- participation records
- feedback provided during project activities

The project applies the following principles:

- data minimisation
- purpose limitation
- secure storage
- restricted access
- anonymisation or aggregation where possible

Access to personal data is limited to authorised personnel, and appropriate technical and organisational measures are implemented to ensure confidentiality and integrity.

Participants are informed of their rights regarding their personal data, including access, rectification, and deletion, in accordance with GDPR provisions.

Requests relating to access, rectification, deletion or restriction of personal data are managed by the responsible partner in accordance with their institutional GDPR procedures and, where relevant, in coordination with the project coordination team.

In practice, data subject requests are handled through established institutional procedures of the responsible partner organisation. Upon receiving a request, the responsible partner verifies the identity of the requester, assesses the scope of the request and responds within the timelines defined by GDPR. Where relevant, the project coordination team may be informed to ensure consistency across the consortium. Requests related to data stored in shared project systems (e.g. Backoffice or SharePoint) are coordinated to ensure that all relevant instances of the data are appropriately addressed.

In the context of shared project systems such as the Backoffice, data processing follows a model combining centralised control with distributed use. The BioSense Institute, as the infrastructure owner, acts as the central controller responsible for hosting, technical management, security, backups and overall system availability. User management, roles and access permissions are administered centrally by the coordination team (EVILVO and BioSense), ensuring consistent governance of access rights across the consortium.

Consortium partners use the system to register participants, manage activities and monitor project implementation; however, they do not determine the underlying data structure, retention policies or access control mechanisms. Therefore, partners do not act as joint controllers in this context but operate within the centrally managed system.

Outside of shared project systems, partners act as separate controllers for any data processing carried out through their own tools (e.g. surveys, mailing platforms), in accordance with GDPR responsibilities and applicable project procedures.

6.4 Data anonymisation and confidentiality

Whenever possible, datasets used for analysis or dissemination are anonymised or aggregated to reduce the risk of identification of individuals or organisations.

Sensitive information is not disclosed publicly and is handled according to project confidentiality agreements and institutional data protection policies.

Where audiovisual materials include identifiable individuals, consent is obtained prior to recording or publication.

6.5 International collaboration and data transfers

The consortium includes partners located outside the European Union. Data exchanges with non-EU partners are limited to what is necessary for project implementation and are conducted in compliance with applicable data protection legislation and institutional procedures.

The project does not involve the transfer of biological materials or other physical samples; all exchanges relate exclusively to digital information.

6.6 Ethical oversight

Ethical compliance is monitored through project governance structures and institutional oversight mechanisms.

Where relevant, guidance is provided by:

- the coordinating institution
- institutional ethics committees
- an external ethics advisor

Regular reviews ensure that ethical safeguards remain appropriate as project activities evolve.

7 Other Issues

At the time of this update, no additional issues affecting data management have been identified beyond those already described in previous sections. The project does not involve the use of sensitive categories of personal data, large-scale data processing, or high-risk technologies.

Data management practices remain proportionate to the nature of the project, which focuses primarily on coordination, stakeholder engagement, and knowledge exchange activities.

Should new types of data or unforeseen ethical, legal, or technical issues emerge during the project lifetime, they will be addressed in subsequent updates of the Data Management Plan.

8 Responsibilities and resources

8.1 Roles and responsibilities

The overall responsibility for data management within ClimateSmartAdvisors lies with the project coordination team, supported by the Work Package leaders and all project partners.

Specific responsibilities include:

- **Project coordination**
Oversees the implementation and updates of the Data Management Plan, ensures alignment with Horizon Europe requirements, and coordinates cross-WP data management practices.
- **Data Manager**
To ensure good data management, a Data Manager (Vladislava Grbovic, BioSense, vladislava.grbovic@biosense.rs) sets up a data management plan (DMP) and takes measures to ensure open access to the research data generated by ClimateSmartAdvisors.
- **Work Package leaders**
Ensure that data generated within their Work Packages are documented, stored, and shared according to agreed procedures and FAIR principles.
- **All partners**
Are responsible for managing the data they generate in compliance with this DMP, institutional policies, and applicable legal requirements.
- **Communication and dissemination team**
Supports the management and publication of open data and public outputs.

9 Resources for data management

Data management activities are integrated into project tasks and supported through:

- institutional IT infrastructure and secure storage systems
- project collaboration platforms and repositories
- staff time allocated to documentation, curation, and quality control
- existing institutional policies on data protection and retention

Given the Coordination and Support Action nature of the project, no significant additional costs are foreseen for data management beyond standard project resources.

9.1 Data retention

Project public outputs and relevant project documentation will be retained for a minimum period of five years after the end of the project, in line with Horizon Europe requirements and institutional policies and potential audit obligations. Personal data will be stored only for as long as necessary to fulfil project management, reporting and audit obligations, after which they will be securely deleted or anonymised where appropriate. Publicly available data will remain accessible to the intended audience in line with project dissemination and retention policies. Where appropriate, datasets of long-term value will be archived in institutional repositories.

10 Annex

10.1 Annex

Annex 10.1 provides a high-level overview of the main dataset categories currently identified across Work Packages. This overview will be complemented and progressively refined through a structured metadata file maintained by the Management Team during project implementation.

Annex 1 provides a high-level overview of the main dataset categories currently identified across Work Packages. This overview is being further developed into a structured metadata file under preparation by the Management Team. The metadata file is progressively populated and refined based on available project data, ensuring that datasets are systematically described and consistently organised across Work Packages. It will be continuously updated throughout the project to reflect newly generated data and ensure ongoing alignment with project activities.

WP	Data type	Contents	Collection method	Formats	Purpose	Expected size	Software	External usefulness
WP1	Primary	CoP participation data, stakeholder information, knowledge exchange insights	Surveys, interviews, workshops, audits focus groups	.csv, .xls/.xlsx, .doc/.docx, .pdf, .txt, .jpeg/.png, .mp4, MS Access, MySQL, Oracle	To monitor network activities and collect qualitative information for analysis and research purposes	>100MB	Microsoft Office	Researchers studying advisory systems; AKIS actors, etc
	Secondary	AKIS reports, project guidelines, literature	Desk research and review of existing reports	.doc/.docx, .pdf, .csv	To build state-of-play and inform guidelines	<100MB	Microsoft Office/ Adobe	Researcher community, consortium partners
WP2	Primary	Training needs data, participant feedback, evaluation results	Training needs surveys; pre- and post-training surveys	.csv, .xls/.xlsx, .doc/.docx, .pdf	To design and evaluate training interventions	<100MB	Microsoft Office	Advisory organisations; policy makers

WP	Data type	Contents	Collection method	Formats	Purpose	Expected size	Software	External usefulness
	Secondary	Previous project reports, training materials	Desk research	.doc/.docx, .pdf	To support design of training programmes	>100MB cumulative	Microsoft Office	Mainly internal; synthesis shared externally
WP3	Primary	MIPs data, CoDIES inputs, workshop insights	Surveys to partners; interviews; workshop documentation	.csv, .xls/.xlsx, .doc/.docx, .pdf, multimedia	To map innovation initiatives and analyse advisor roles	~100MB	Microsoft Office; Adobe	Advisory services; policy makers; researcher
	Secondary	Project databases, scientific and grey literature	Database screening and literature review	.csv, .xls/.xlsx, .doc/.docx, .pdf	To develop classification and analytical framework	<100MB	Microsoft Office; Adobe	Advisory services; researchers
WP4	Primary & Secondary	Monitoring and evaluation datasets, including survey data, evaluation results collected	Monitoring surveys; interviews; evaluation activities	Various formats	No changes since initial DMP	Not specified	Not specified	Not specified
WP5	Primary	Toolkit inputs, focus group results, feedback	Focus groups and consultations	.doc/.docx, .pdf, .jpeg/.png, .mp4	To develop and refine training materials and toolkit	<100MB per dataset	Microsoft Office	Advisors; AKIS actors; researchers
	Secondary	Existing tools, publications, project outputs	Desk research and network input	.doc/.docx, .pdf, multimedia	To populate toolkit repository	>100MB cumulative	Microsoft Office; platform backend	Advisors; farmers; researchers
WP6	Primary	AKIS stakeholder data, workshop documentation	Co-creation workshops, trainings, focus groups	.csv, .xls/.xlsx, .doc/.docx, .pdf, multimedia	To map AKIS structures and strengthen collaboration	<100MB	Microsoft Office	Policy makers; advisory managers, researchers
	Secondary	AKIS reports, project databases	Workshops, focus groups	.doc/.docx, .pdf, .csv	To support network and improve CS AKIS across EU	<100MB	Microsoft Office	AKIS initiatives

WP	Data type	Contents	Collection method	Formats	Purpose	Expected size	Software	External usefulness
WP7	Primary	Collaboration records, policy inputs	Stakeholder consultations and project exchanges	.csv, .doc/.docx, .pdf, multimedia	To support synergies and sustainability planning	>100MB cumulative	Microsoft Office; Adobe	Sister projects; policy makers
	Secondary	Outputs from related projects	Desk research	.doc/.docx, .pdf, .csv	To inform synergy and policy activities	Moderate	Microsoft Office	Sister projects; policy community
WP8	Primary	Website analytics, subscriber data, dissemination materials	Website tracking tools and mailing platforms	.csv, jpeg, .gif, .png, .csv, .ods, .tsv	To monitor outreach and impact	>100MB cumulative	Microsoft Office, Adobe, Get response, social media analytics	Innovation networks; AKIS actors
	Secondary	Visual materials from related projects	Reuse of dissemination content	Multimedia	To support communication and visibility	>100MB cumulative	Microsoft Office, Adobe	General public; innovation community

Table 1 Overview of datasets by Work Package

10.2 Annex

The ethical considerations and procedures remain unchanged compared to the initial DMP version. No new ethical issues or data protection risks have been identified based on the latest Work Package inputs.

Informed consent	Other types of forms of ethical issues	Organisation and storage of consent files	The use of personal data	Data security
WP1 Networking CSA to foster peer learning and knowledge exchange				
Yes, (for surveys, interviews, workshops)	No, (no additional ethical risks beyond standard personal data processing under GDPR)	Consent files stored in secure locations at partner organisations	Yes Personal data processed in line with GDPR; anonymised or aggregated where possible for monitoring and network activities	Anonymization will be applied where necessary; consent requested for publication of personal data
WP2 Training advisors to deliver targeted climate smart advice				
Yes (for training participation, surveys and feedback collection activities)	No	Managed by responsible partners in secure digital storage	Yes, Stored in SharePoint/Teams and survey tools (e.g. MS Forms) with restricted access	Secure institutional storage with controlled access

Informed consent	Other types of forms of ethical issues	Organisation and storage of consent files	The use of personal data	Data security
WP3 Strengthening the role of advisors in CSF multi-actor innovation projects				
Where applicable	No (no additional ethical risks beyond standard data protection)	Stored in SharePoint/Teams and managed by responsible partners	Where applicable (Personal data processed only where necessary)	Stored on secure platforms with role-based permissions
WP4 Monitoring, evaluation and learning				
Yes	No	Stored in CSA SharePoint/Teams and institutional systems when applicable	Where applicable – mainly aggregated or anonymised data used	No
WP5 Development of training materials & climate smart farming toolkit				
Yes (for interviews, focus groups, audiovisual materials and Farming for Climate contributions)	No	Stored in SharePoint/Teams and linked to Backoffice; public outputs via Farming for Climate platform	Yes Personal data processed under GDPR; anonymisation applied; public data shared only with consent	Secure storage protocols implemented + controlled public sharing via Farming for Climate
WP6 Reinforcing national AKIS actors to support CS advisory services				
Yes (for stakeholder engagement, workshops and AKIS analysis data collection)	No	Stored in SharePoint/Teams and institutional systems	Yes Personal data processed under GDPR; anonymised where applicable	Standard institutional data protection procedures and controlled access
WP7 Link and coordinate with other projects, initiatives and policy makers				
Yes (for stakeholder interactions, coordination and reporting inputs where personal data are included)	No	Stored in structured tools (e.g. Excel DEC-PIP) and SharePoint/Teams	Yes, where personal data are included, they are processed in line with GDPR and shared in aggregated form	Stored in secure institutional environments with restricted access
WP8 Dissemination, Exploitation and Communication				
Yes (for audiovisual materials, interviews, testimonials and feedback collection involving identifiable individuals)	No (limited to consent and GDPR compliance for dissemination)	Stored in SharePoint/Teams and linked to dissemination platforms; consent collected where needed	Yes, personal data processed under GDPR; audiovisual data used only with consent; feedback anonymised	Secure storage secure platform management + controlled dissemination of approved material

Table 2 Ethical procedures by Work Package



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