

MID-TERM DATA MANAGEMENT PROTOCOL

Deliverable number: D6.2

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June 2026





Funded by
the European Union

DAISY receives funding from the European Union's Horizon Europe research and innovation programme under grant agreement No 101181857.



Project's technical information

Project acronym	DAISY
Project title	DigitAl, technological and Social innovation mixes enabling transformation for biodiversity and equityY
Starting date	01 st January 2025
Duration	36 months
Website	https://mydaisy.eu
Project coordination	Alex Franklin and Agnes Zolyomi

Deliverable's information

Deliverable number	D6.2
Work package no.	WP6
Deliverable title	Mid-term Data Management Protocol
Task leader	Coventry University (CU)
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Dissemination level	Confidential
Type of deliverable	DMP

Version management

Version	Status	Date	Authors/Reviewers
0.1	Draft	30/04/2025	Author: Alex Franklin (CU);
0.2	Draft	14/05/2025	Reviewers: Agnes Zolyomi (GF); Sven Grüner (MLU)
0.3	Draft	15/06/2025	Authors: Gergő Berta (ESSRG); Karmen Czett (ESSRG); Katharina Dehnen-Schmutz (CU); Sian Harrigreen (CU); Edit Hunyadi (MLU); Eszter Kelemen (ESSRG); Veronika Kiss (GF); Irini Salverda (WR), Ilkhom Soliev (MLU); Rosalie van Dam (WR); Richard Voelker (MLU); Amy Wortel (WR) Reviewers: DAISY consortium
1.0	Final	19/06/2025	Reviewers: Alex Franklin (CU); Agnes Zolyomi (GF); Sven Grüner (MLU)

Recommended citation

Franklin, A., Zolyomi, A., Grüner, S., Berta, G., Czett, K., Dehnen-Schmutz, K., Harrigreen, S., Hunyadi, E., Kelemen, E., Kiss, V., Salverda, I. E., Soliev, I., Van Dam, R. I., Voelker, R., Wortel, A. L. (2026). Mid-term Data Management Protocol. (Report No D6.2). Project 101181857 – DAISY. Brussels: European Research Executive Agency.

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List of abbreviations and acronyms used in this document

Acronym	Definition
AI	Artificial Intelligence
BDD	Budapest Doughnut Degrowth
CC	Consumer Cooperative
CESSDA	Consortium of European Social Science Data Archives
CSA	Community Supported Agriculture
CU	Coventry University
CWS-CNC	Coventry-Warwickshire-Solihull City Nature Challenge
DCC	Digital Curation Centre
DDI	Data Documentation Initiative
DMP	Data Management Protocol
ESSRG	Environmental Social Science Research Group
EU	European Union
FAIR	Findable, Accessible, Interoperable, Reusable
GDPR	General Data Protection Regulation
GF	GreenFormation
Gfew	Gesellschaft für experimentelle Wirtschaftsforschung
IPR	Intellectual Property Rights
KTU	Kaunas University of Technology
MJL	Measure Your Landscape
MKLE	Monitoring Network for Small Landscape Elements
MLU	Martin Luther University Halle-Wittenberg
REA	Research Ethics Association
TIESS	Transdisciplinary Institute for Environmental and Social Studies
TRD2	Transformative Diagnostic Tool



DAISY
LET'S TURN ON TRANSFORMATION

UFZ	Helmholtz Centre for Environmental Research
WP	Work Package
WR	Wageningen University and Research
WUR-REC	Wageningen University and Research Research Ethics Committee

Background: About DAISY

DAISY - Digital, technological and Social innovation mixes enabling transformation for biodiversity and equity - will advance understanding of how specific mixes of interventions including social-technological innovations can be used to induce transformation for biodiversity and equity.

DAISY's main objectives

- ☛ To understand which socio-economic, political and behavioural processes, and their interrelationships shape and enable our personal, political and practical ability to respond to the biodiversity crisis and how they impact on transformative change.
- ☛ To collect existing tools, processes, interventions and innovations that are conducive to triggering transformative change with the understanding of what enables them to address biodiversity loss and social inequity.
- ☛ To create intervention mixes based on existing tools and innovations and apply them in practice to induce transformation in all three spheres (personal, political, practical) to support biodiversity and equity prioritisation in decision- and policymaking.

Our case studies to test innovations

Innovation mixes will be tested and assessed for effectiveness in five seed innovation intensive case studies, within the domains of agri-food, education, energy and urban and regional development.

Turning on transformation

DAISY will contribute to the societal debate on transformation by showcasing innovation through bridging activities, networking events, wide stakeholder engagement and collection, connection and distribution of innovation seeds to switch on transformation.

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Executive Summary

This Data Management Protocol (DMP) outlines how the DAISY project will manage, store, and secure data throughout its three-year duration and for the following five-year period, in full compliance with the FAIR principles (Findable, Accessible, Interoperable, and Reusable) and the General Data Protection Regulation (GDPR). It provides clear guidelines for all consortium members and individuals involved in handling project data, with particular attention to issues of data sensitivity and security.

This version is the second of three planned iterations of the DMP. A final update will be issued at the project's endpoint (Month 36), ensuring the protocol remains responsive to evolving methodologies and ethical requirements across the project and its case studies.

While this protocol focuses on research data, separate provisions are made for data collected via the DAISY website for communication or interaction purposes; these are governed by a dedicated data privacy policy included in the annex.

This document includes:

- ☛ A summary of project data
- ☛ Compliance with FAIR principles
- ☛ Data security and ethical considerations
- ☛ GDPR integration
- ☛ Case Study Level and TRD2 DMPs (Annex 1, Annex 2)
- ☛ Templates for participant information and informed consent (Annex 3)
- ☛ The website privacy policy (Annex 4)

This DMP serves as a living document that will evolve with the project to ensure robust, ethical, and transparent data management.

1 Introduction

This Data Management Protocol (DMP) explains how the DAISY project will secure and manage data and how it complies with data management policies including the FAIR principles and the General Data Protection Regulation (GDPR). The DMP pre-defines guidelines for all consortium members, inclusive of all individuals who will have access to, manage and use the project data, on how to handle various types of data sensitivity and data security.

This version (V2.0 (Mid-term Data Management Protocol)) of the DAISY DMP is the second of three scheduled iterations to be produced during the active, three-year lifetime of the project. It will be replaced by a third (updated) version (V3.0 (Final Data Management Protocol)/ Deliverable 6.3) in month 36 of the project.

By implementing a staged approach to the planning and management of DAISY data throughout the lifetime of the project, we will be able to ensure that we remain responsive to, and up to date with, any changes in methodological strategy at both the individual case study and overall project level. This precautionary approach is important given the participatory (action-orientated) and generative approach that forms the basis of DAISY.

This DMP is primarily concerned with the management of data for research purposes. In the case of data collected and stored – via the DAISY website - for the purpose of communicating research findings (and/or any associated interactive features), this is governed by a separate data privacy policy, a copy of which is included as an Annex to this document. The overarching DMP is accompanied by associated case study level DMPs and also a [TRD2](#) DMP, all of which are also contained in the Annexes.

In the remainder of this document, firstly a data summary is provided, followed by sections on the FAIR Data Management principles and implications of the project, data security and ethical aspects as well as the GDPR principles integration to the project. The document concludes with an Annex containing five individual case study level DMPs (Annex 1), a TRD2 DMP (Annex 2), template 'Participant Information' and 'Informed Consent' forms (Annex 3) and a copy of the DAISY website privacy policy (Annex 4).

2 Data Summary

The purpose of the data collection and its relation to the objectives of the DAISY project is to gain a deeper understanding – through economic, social, political, and behavioural lenses – of how social-technological innovations can contribute to systemic change. The project aims to identify key factors that enable such transformations. This understanding will support the development of well-tested and evidence-based recommendations for combinations of interventions, including social-technological innovations that can effectively promote biodiversity and equity.

Building on knowledge and findings drawn from a review of existing research and policy, as well as private and third sector practice (Work Package (WP) 1, WP2), a range of digital, technological and social innovations were identified. Alongside, these knowledge sources will also be assessed for identifying a diversity of potential interventions – such as regulations, financial incentives, information campaigns, and tools that influence decision-making and social norms (WP3). They will be further explored with the purpose of combining and testing intervention mixes. The effectiveness, cost-efficiency, and public acceptance of the most promising intervention mixes will be evaluated through laboratory experiments, scenario-based workshops, surveys, and in-depth case studies (WP3, WP4).

For the case studies, five seed innovation initiatives have been selected across Germany, Hungary, the Netherlands, and the UK, each aligned with DAISY's focal domains: agri-food, education, energy, and urban and regional development. For each case study the local DAISY consortium partner is collaborating with stakeholders to co-creatively explore their innovation journeys, envision future transformation pathways, and co-design strategies to enhance and sustain their impact. This includes collaborative activity directed towards scaling efforts within the initiatives, expanding reach to new communities or regions, influencing broader institutional frameworks, and fostering connections across different initiatives to support long-term change across practical, political and personal dimensions.

DAISY research involves both primary and secondary data collection. The project commenced with desk-based secondary data collection (e.g. literature reviews, policy reviews, patent reviews) and also consortium partner workshops (WPs 1, 2

and 3). As an integral part of this first stage (particularly months 1-6) consortium partners made known to task leaders any existing data sets which have relevance to the project (including, if applicable, reducing the requirement for primary data collection in instances where the required data/ information already exists).

For the primary data collection associated with the five case studies (WP4), empirical data collection methods during the first phase of the work have been centred around semi-structured interviews, learning history orientated focus group discussions, and scenario workshops. This will be followed with a second phase of more experimental (social science) data collection orientated towards the mixing and application of intervention methods within lab-based test environments (i.e. within partner institutions) (WP3). Depending on the outcomes and learning gained from this lab-based mixing, a third phase of empirical research will involve refined versions being used to support the project's amplification activities with other seed innovations and with key national and international stakeholders (WP4, WP5).

The specific research-based intervention methods to be applied during the third phase of the empirical research (focused towards amplification) will be largely agreed upon during months 18-24 of the project, with further detail on data collection methods accordingly being included in Version 3.0 of the DMP.

The format of the data collected will vary in size and attribute. It will potentially include data such as original tangible data (video (.mp4) and audio (.mp3) recordings, hard copy surveys, field notes (.doc, .pdf), drawings (.jpg, .png), etc.), digital data (e.g. interview schedules, workshop design, transcribed interviews and workshop discussions (.docx, .pdf), photographic (.tif) or video recordings (.mp4)), and processed data sets used in publications, including information to understand the processing (e.g. coding steps, data (.docx, .xls) to allow others to check and/or replicate the process leading to the results, and to guarantee transparency and scientific integrity of data processing.

DAISY research will involve human participants as volunteers for social or human sciences research. The involvement of human participants refers to their role as respondents, and occasionally as participatory action research collaborators – especially during individual case study research activity (WP4). All such involvement will be subject to detailed ethical standards (please see the Ethics section of this

DMP; 'Part 4: Ethics Self-Assessment' of the Grant Agreement; also section 4 of the individual case study DMPs contained in Annex 1 of this DMP; also Articles 14 'Ethics and Values' and 15 'Data Management', of the Grant Agreement, for further details).

Ethical issues primarily relate to the involvement of research participants, including members of the public. Emphasis will be placed on engagement of individuals representing (in total) a relatively diverse array of social characteristics (e.g. gender, age, ethnicity, educational level). Data collected may include sensitive personal data (e.g. race or ethnic origin, political opinion, gender, health, income).

Intervention mixes will initially be designed for the purpose of supporting amplification in the five seed innovation case study initiatives, and ultimately far more broadly across the four main DAISY domains (agri-food, education, energy, and urban and regional development) and beyond.

Consortium partners will ensure there will be no negative or adverse impacts (social, environmental, economic, political or cultural) resulting from research participation in this project, or from the research activities more broadly.

3 FAIR data

3.1 Making data findable, including provisions for metadata

DAISY will make data open whenever possible, but as closed as necessary when taking into consideration personal data and privacy. When affecting confidentiality and privacy, data will not be shared publicly. In all other cases, we aim to make the research data as widely available as possible, considering the FAIR principles.

As the project has progressed beyond the initial stages, data types and methods of data collection are now more clearly defined across work packages and case studies. This version of the DMP reflects these developments, including the adoption of a common metadata approach to support data findability. Accordingly:

- ✚ Where primary data are recorded in written form and are suitable for open access sharing (i.e. in full accordance with GDPR, without identifying individual

research respondents in cases where anonymity forms a condition of consent for their participation, or with the consent of the research participant) it is being made available for uploading into a digital repository (Zenodo).

- ☛ All data uploaded into a digital repository are accompanied by descriptive and administrative metadata. A common template has been developed and is being applied across consortium partners to support the FAIR principle of making data findable. The metadata includes information such as dataset title, contributing partners, abstract, methodology, data type, keywords, country of data collection, category of respondents, sampling procedure, mode of collection, and data collection period.
- ☛ In the case that a data entry has to be 'cleaned' to ensure respondent anonymity, this is noted as part of the corresponding descriptive metadata.
- ☛ The data being collected by the DAISY partners includes a mixture of both qualitative and quantitative data. It also includes a mixture of both primary and secondary data. In cases where secondary data is publicly accessible, the associated deliverable will include information on the source in order that it can be accessed directly.
- ☛ In compliance with GDPR, unless respondents specifically request that their names, and/or any other personal data be included in the publication of research results, personal data such as names are either be replaced by a pseudonym or unique reference code. Master files detailing the individual respondents to which the pseudonym or codes relate are password protected and securely stored. Access to these files is limited to the consortium partners directly involved with data collection in relation to that individual activity or case.

3.2 Making data openly accessible

With the consent of the research participant, and with the exclusion of data to be treated as secure data not for sharing – i.e. namely data affected by GDPR (especially personal data and 'special categories of personal data' (formally known as 'sensitive data')), and/or raising any ethical concerns, unless this data has also been specifically consented by the research participant for public sharing – data will ultimately be shared on an open access basis. Such open access data sharing will be instigated in accordance with a period of embargo – by/before 31 November

2027 (project month 35) – during which access to the data will first be restricted to the consortium partners of DAISY.

By the date when the embargo period of DAISY has expired, open access data will have been deposited in secure open access repositories (e.g. authorised secure institutional or national level data repositories) in accordance with the existing (GDPR compliant) regulations of the host (partner) institutions and in accordance with the DAISY DMP.

In all cases, data will be hosted on secure servers, fulfilling EU regulations on data protection. The repository systems to be used will be selected on the basis they do not require any specific software and provide open access according to UK and EU regulation (as applicable).

In the UK case study, biodiversity observation data generated via the iNaturalist platform are hosted and governed by that platform's own infrastructure and data protection arrangements, rather than being stored on project-managed servers (for further detail see Annex 1 individual case study DMP).

In the Dutch case study, monitoring data on landscape elements in the province of Utrecht are hosted and governed by the case studies' own platforms, rather than being stored on project-managed servers. This applies for both the Province of Utrecht as well as Measure Your Landscape, *MJL*. They have their own infrastructure and data protection arrangements (for further detail see Annex 1 individual case study DMP).

For ease of access, in order to identify what data sets are stored in the DAISY repository, metadata will be provided on the DAISY website, with (wherever possible) direct hyperlinks to the location of storage. Similarly, publications based on data collected within DAISY will be listed on the website, with a hyperlink to full-text on the website of the journal (all publications will be open access compliant). The DAISY project website will remain active for a minimum of five years after the completion of DAISY (i.e. at least until December 2032), ensuring access to the outputs and the visibility of the publications.

In accordance with the Grant Agreement contractual obligations of DAISY, all research related data (excluding personal and 'special categories of personal data')

(formally known as ‘sensitive data’) (see below)) will be stored for five years after the end of the research project (in case there is a high interest in the datasets or due to different national legislation, data may be stored for a longer period, which will be transparently discussed and approved within the consortium and relevant parties). Data that are used for publication will be stored for a minimum of five years after publication.

In the case of personal data and ‘special categories of personal data’, this will be destroyed at the end of the research project. It is necessary to retain such data until this point in accordance with the right of research participants to withdraw their data from the study throughout any time until the end of the project (see also Annex 1).

For the vast majority of the data sets uploaded to the open access repository, no specialist software packages will be required beyond those included in standard operating systems. Apart from general data formats of e.g. Microsoft Office; Adobe Reader; video playing and photo screening general software, the data may also be saved in formats suitable for long-term accessibility (e.g. RTF, TXT, ZIP, XML, CSV, SHP, DBF, GeoTIFF, NetCDF, MOV, MPEG, AVI, MP3, WAVE, ASCII, DTA, POR, SAS, SAV, PDF, WARC).

During the kick-off meeting of the DAISY project, it was re-confirmed that a DAISY Ethics Committee would be established with a schedule of regular six-monthly meetings, and also ad hoc when required, and that Data Management would be included within the responsibilities of the DAISY Ethics Committee. The DAISY Ethics Committee consists of representatives from CU (Alex Franklin), GF (Agnes Zolyomi) and MLU (Sven Grüner). It held its first meeting on 25 June 2025, with the key points of that meeting reported back to the WP Leads and/or Steering Committee.

3.3 Making data interoperable

DAISY uses controlled vocabularies (DDI, CESSDA, European Social Science Thesaurus) in the metadata to allow interoperability. Using controlled vocabularies to describe the methodology used to collect the data, analytical and procedural information, definitions of variables, and units of measurement, helps the data to be discovered and reused.

Data produced through DAISY (e.g. inclusive of unstructured and semi-structured data types (e.g. scenario workshops, learning histories, semi-structured interviews, participant observation accounts, photographs, videos, drawings, numeric data)) use standard formats (e.g. .docx, .pdf, .txt, .jpeg, .avi formats), as much as possible being compliant with available (open) software applications, facilitating also recombination with various datasets from different origins, and will be uploaded onto the DAISY repository in file types supportive of interoperability.

3.4 Increasing data re-use (through clarifying licences)

Whenever suitable, data will be open access licensed data, after careful consideration of personal data, Intellectual Property Rights (IPR), and additional legal and ethical requirements. Based on open access regulation, we allow data to be reused by third parties, but with restrictions if IPR or other rights demand such restriction. Data licensing is based on guidance provided by the coordinating team (CU/GF). Copyright of the data, if applicable, is based on the Digital Curation Centre (DCC) and EU guidance; IPR ownership is based on the Consortium Agreement. Restrictions on sharing data may apply in case of protecting propriety or patentable data (although so far, no such instance is envisaged).

Prior to being made accessible, the data will be reviewed and cleared by the directly associated consortium partner(s) (i.e. those responsible for the original collection of such data). The quality of the metadata will also be checked by the DAISY Ethics Committee. Where necessary, additional external expert advice (e.g. from institutional or national GDPR and data management experts) will also be secured. Where relevant, access to the data will be dependent on any agreed embargo period (31 November 2027 (project month 35)).

All anonymised/ pseudonymised data will be stored at least for five years after the end of the research project. Because of the (primarily) social science nature of the data there is no time limit for its re-usability. In case of sharing data or restricting certain data with third parties outside of the consortium, a data sharing agreement will be set up that will also detail participant consent for data sharing, copyright permissions, and agreement on any embargo period. Data sharing will be limited to anonymised processed data only, with no raw data shared. Data will be used in standard forms allowing reuse, as well as allowing searchability.

Data quality assurance processes will be undertaken, including applied standards and methodologies based on the DCC guidance. The collection and processing of data in the case of the five DAISY case studies will be conducted in conformity with this overarching DMP.

3.5 Allocation of resources

Any legitimate costs for making data FAIR and ensuring open access, especially for publications based on the data collected, will be covered from the existing DAISY consortium partner budgets. A task of the DAISY Ethics Committee is to advise the Steering Committee on an amount to be reserved by consortium partners for any newly arising costs associated with FAIR compliance.

In addition, the coordinator and the consortium partners will continue to ensure their specific nominated repository (Zenodo) will store relevant data in a safe place, and that specific expertise is provided for managing and updating such portals.

This DMP applies to all researchers of the DAISY consortium, and individually each consortium partner is responsible for managing their data adequately. The main responsibility for correct data management lies with each individual staff member in accordance with the DAISY DMP and guidance provided by the host institution. The consortium partner institution of the researcher/staff member is formally responsible for all data gathered during the employment contract. If the employment contract of an individual researcher ends, they will be responsible for leaving datasets that have been gathered as part of the employment activities in an accessible way and in compliance with this DMP, the policy of the host partner institution and with any other relevant legal requirements.

If DAISY researchers publish with co-authors outside DAISY, in instances where this involves access to data sets, they will ensure the external co-authors have read the DAISY DMP, including full compliance with GDPR. In the case of publications developed with authors from third-party institutions, GDPR-sensitive data will not be shared, with data sharing instead limited to anonymised processed data only, with no raw data shared in which it is possible to identify respondents.

Although the DAISY Ethics Committee oversees the delivery of the DMP, ultimately responsibility for data management is jointly an individual and collective

responsibility of all persons directly involved in DAISY research, and all partner institutions. The DAISY Ethics Committee will continue to regularly report to and provide recommendations to the Steering Committee.

4 Data security

4.1 Data to be stored

The aim is to ensure that data sets and records provide sufficient information to external parties to establish the scientific integrity of the information and that the scientific outcomes are reliably based on the evidence collected by researchers. The following data will and/or is envisaged to be stored:

- ✦ Original tangible data, e.g. hard copy of surveys, signed informed consent forms
- ✦ Raw digital data, e.g. audio or video recordings, transcripts of interviews or workshops, drawings, photographs etc.
- ✦ Processed data sets used in publications, including information to understand the processing, in particular
 - i) coding steps
 - ii) data cleaning logs
 - iii) Sufficient metadata to allow others to check and/or replicate the process leading to the results
- ✦ Data used in publications. This can include:
 - ✦ Sample copies of records used to collect information (e.g. interview schedules, questionnaires, fieldwork notes if used in a publication, drawings, photographs, videos and films etc.)
 - ✦ Analysed research data (such as datasets held in databases, spreadsheets, midterm reports)
 - ✦ Supporting documents (date of the collected information, source of the information, place, etc.)
- ✦ Intermediate data sets (where necessary) to guarantee transparency and scientific integrity of data processing
- ✦ Data required by involved partners/funding agencies. This can include:
 - ✦ Recording of procedures (protocol documents, application for regular approvals and approvals granted, risk assessments).

- ☛ Records relating to the financial management of the project (invoices, orders, delivery notes, supporting account records etc.)
- ☛ Any data sharing agreements

4.2 Data storage

Tangible data and paper records are kept in lockable cabinets or offices with controlled access, when not under the direct supervision of a member of the research team.

Access to electronic data and records is controlled by passwords and, where appropriate, access to individual files/databases is password protected. Passwords are known only by authorised individuals. Access controls will be regularly reviewed and updated as individuals join or leave the project. Computers and software are not left logged in and unattended. Digital data is stored in the format in which they have been generated.

Where data are stored in folders on the institutional networked shared drive, appropriate access control is implemented to restrict access to data and records to authorised individuals.

A project-specific shared drive has been set up (Microsoft Teams channel, hosted by CU) where access is limited to authorised individuals with password and multi-factor authentication.

Before using any storage media for electronic data and records, including computer hard disks, consideration is given to appropriate security and back-up of the data. Small media devices such as USB sticks and CDs are not considered suitable as the primary storage location for personal data or confidential information. When they are used to transport data, they will be encrypted if used to transport respondent-identifiable data, a large dataset relating to 1000 or more individuals, or data that would cause significant harm or distress to somebody if released. In addition, as the data will need to be kept for a long period (min. five years), consideration will continue to be given to the expected lifespan of the storage media used as media degradation and technological advances may make the records stored on it inaccessible in the future (with advice also sought from any in-house Digital Services support of consortium partner Institutions (where applicable)).

As the storage of research records through the use of cloud computing offered by private service providers such as Apple, Google, Amazon, etc. can carry significant governance and management risks, their use is not advised, unless doing so is a requirement of the host partner institution.

To store records, DAISY partners have been advised to use a folder structure based on the functions and activities of their individual tasks. This makes it easier to share information with other authorised personnel.

4.3 Accessibility

Privacy and confidentiality of data are guaranteed at all times, in line with legal requirements, consortium partner institution policy, and best practice.

Data in process is only be available to the researchers directly involved in the associated case study and task. Access by third parties has to be negotiated with the project coordinator or directly associated consortium partner unless otherwise specified.

Should ethical questions or concerns about the integrity of research data or data management be raised, access to data will be granted in line with legal requirements, partner institutional policy and guidance, and where applicable, European Commission policy. Established guidelines for academic good practice (e.g. as provided by academic associations or research councils) will be consulted where appropriate.

5 Ethical aspects

5.1 Overview

The DAISY consortium is committed to ethical research and to the **principles** described in the [Charter of Fundamental Rights of the European Union](#), the [European Convention on Human Rights](#) and its supplementary [Charter of Fundamental Rights of the European Union in Practice](#) and will continue to abide by the spirit of pioneering documents (such as the Nuremberg Code and the Declaration of Helsinki) and carry out its activities according to standard procedures

as advised by the European Commission. This includes the European approach to artificial intelligence (AI) and the [European Union's ethical guidelines on AI](#).

Coventry University has secured ethical approval via its internal ethics review board for the overall DAISY project in accordance with its role as coordinating institution (P185462). In addition, all individual consortium partner institutions undertaking research involving human participants have been required to secure approval for all associated task activity from their own in-house (or national/ federal, as applicable) institutional review boards. In the case of the two institutional partners (GF and ESSRG) without access to an internal ethics institutional review board, applications for ethics approval (non-legally binding) were submitted and certified through Coventry University.

To safeguard the overall implementation of the respective ethical standards and support in addressing new ethical issues that might arise in the course of the project, DAISY established an **Ethics Committee**. It consists of representatives from CU (Alex Franklin), GF (Agnes Zolyomi) and MLU (Sven Grüner). All members have extensive combined research and research ethics expertise. In addition to overseeing consortium compliance with Research Ethics, the DAISY Ethics Committee also takes the lead in ensuring that the DAISY consortium addresses all project objectives and requirements for best practice with respect to Equality, Diversity and Inclusion more broadly. The Ethics Committee meets on a six-monthly basis (and ad hoc when required). It assists the Steering Committee as an internal advisory committee, helps to ensure all the agreed ethical and safety regulations are followed, and advises if they need to be updated. The DAISY Ethics Committee also works in close collaboration with the individual consortium partner institutions.

5.2 Humans

The DAISY research involves **human participants** as '**volunteers for social or human sciences research**'. The involvement of human participants refers to their role as respondents during method testing (WP3, WP4), individual seed innovation case-study based field research (WP4) and/or scaling up intervention activity (WP4, WP5), the latter including interactive and generative communication and dissemination activities.

All research undertaken in connection with the five seed innovation case studies is subject to the ethical standards in force at the respective associated lead case study partner consortium institution, or in the case of consortium partners for whom no in-house ethical review board exists (GF; ESSRG), their involvement is subject to the ethical standards of CU (as coordinating institute). This is substantiated via a formal ethical approval review process and corresponding securing of certification of approval per associated institution.

5.3 Procedures and criteria to recruit research participants and formats for research participation

The research involves voluntary participation of humans in the following type of individual and group research activities: semi-structured interviews, focus groups, learning history workshops, scenario (3-Horizon) workshops, citizen science (iNaturalist), surveys, participant observation, observation of group behaviour. It will also involve voluntary participation in a mixture of research-based interventions, including behavioural lab-based experiments, the specific composition of which will be confirmed during months 18-24 of DAISY (with further detail provided in V3.0 of the DMP). None of those activities belong to any of the activities highlighted by the Ethical Issues Checklist.

Among the participants are: policymakers at different administrative levels; representatives of civil society organisations; business representatives; profit and non-profit organisations such as schools and social enterprises, university researchers and/or students, and the general public. The participants are able and are asked to give informed consent before taking part in research activities. In advance of being asked to give informed consent, all participant rights, as well as duties and obligations of the researchers, are being provided in an accompanying participant information sheet (see Annex 3). Should any case studies require the recruitment of minors and/or vulnerable adults as part of the research, the DAISY Ethics Committee will support the associated partners in developing a purposefully adapted version of the participant information and informed consent sheets. These sheets will also be submitted for approval by the associated institutional ethics review board (or, where this does not exist, by Coventry University Ethics Committee).

The recruitment of the participants is based on their interest or participation in (1) the seed innovation case study initiatives, either directly or indirectly (e.g. including via amplification of activities within additional locations and at higher scales; (2) transformative change workshops and exchanges coordinated with members of other relevant transformative change biodiversity projects and initiatives; (3) key policy decision-making processes and organisation (including especially within the domains of agri-food, education, energy, and urban and regional development). Thus far, participants include those who were engaged in autonomous environmental activities, community group activities, or private and public initiatives. Others may be contacted because of the relevance of their knowledge and experience about biodiversity practice, decision-making, behaviour change and/or collaborative forms of local activities. The data that participants are asked to provide is dependent on the individual seed innovation case study or type of involvement (workshop, survey) and will be further elaborated upon in the individual case study level DMPs contained in Annex 1.

Each individual consortium partner has been consulted during the drafting of V2.0 of this DMP. Furthermore, each has been tasked with identifying and communicating to the DAISY Ethics Committee any/ all ethical issues relating to their specific case. With regard to the identification and recruitment of research participants, this includes any updates/ changes with respect to:

- ☛ How (and what volume of) research participants are being involved in the project, for which goals, and how they are being recruited;
- ☛ The choice of methods, e.g. multi-stakeholder participation, interviews, observation etc.;
- ☛ How respondents are informed about the collection, use, storage, sharing and ownership of the information;
- ☛ The requirement that research participants are asked to sign a letter of consent;
- ☛ Securing informed consent form and provision of participant information sheet (see Annex 1).

Any substantive changes/ updates will have been approved by the prevailing ethics review board at the project partner institution, or in the event of a partner not having an in-house ethics review board, by Coventry University. The original round of approval was secured prior to the commencement of any primary data collection.

Further specification of participants and types of interventions as well as related data provided is specified in Annex 1 of this DMP.

5.4 Informed consent procedures

Informed consent will be secured from all human participants when they participate in any DAISY primary data collection activities (see Annex 1).

All participants will take part in the research voluntarily and could decide at any moment to discontinue their participation. The WP4 lead, working in collaboration with the co-ordinator and the DAISY Ethics Committee and the co-ordinating institutions, have finalised and approved informed consent and participant information sheets for all potential participants in the project (see Annex 1), providing a clear written account of the goals of the research, the methods employed and use made of its results, as well as its relevance to the respondent and the implications of participation. These documents will be translated into all languages that are associated with primary data collection. The informed consent and participant information sheets explain any potential risks that might be involved (for example being identified as part of a particular group or providing personal information by chance) and how confidentiality will be ensured throughout the collection, analysis and dissemination of data.

The informed consent and participant information sheets also provide information on how and who to contact regarding any further questions about the project. The information will be explained in person at the start of each new data collection activity, after which – unless for ethical reasons in a limited number of specific cases (e.g. blind or partially sighted participants) it is considered inappropriate to do so – the participants will be asked to sign an informed consent form indicating their consent to participate in the research. In instances where an individual indicates either that they wish to participate in the study but do not want to sign any formal documentation to this effect, or it is considered inappropriate to ask them to do so (see above), they will instead be asked to provide oral consent. Such oral consent will either be given in the presence of a witness, audio recorded, or reconfirmed in writing in follow-on from the research (together with a reminder of all rights of participation).

In the case of any research activities involving minors (WP4; e.g. should there be any data collection associated with seed innovation public engagement amplification activities), adequate protection of children and young people will be ensured. All information on the research will be composed and communicated in an accessible manner and all minors will be given adequate time to discuss the research with a trusted adult of their choice prior to being asked to confirm if they are willing to give informed consent for participation. In addition to securing the consent of the child, in accordance with national and institutional research ethics procedural requirements and good practice guidelines, permission will also be secured from a legally recognised adult (e.g. parental consent). Where applicable any legal requirements for working with the specific population will be met in full.

All participants will be informed that they can withdraw their consent for whatever reason they wish. Permission will be sought to digitally record data collection activities (audio, visual), record via creative drawn image-based capture, or to record them in writing, explaining that all possible steps will be taken to ensure confidentiality and anonymity of participants at the level of the individual (unless participants specifically request otherwise). The researchers will ensure that participants are aware of the archiving process, the accessibility of the data and asked the consent to their research material being stored in this way.

The researchers may also produce photographs, drawings, videos, or other similar forms of creative visual data, for the purpose of dissemination on-line, in conferences and exhibitions, and in publications. The use of the visual material produced as part of DAISY is limited to dissemination about this project and will not be used otherwise, except where explicit consent has been given by participants.

All consortium partners will use either the standard DAISY informed consent form, translated into the relevant languages, or - where partner institution regulations require that their own institutional informed consent forms are used or national laws require specific adaptations – corresponding versions.

5.5 Templates of informed consent and information sheet

Templates of the informed consent forms and participant information sheet will be kept on file and will be submitted upon request to the REA. Copies are included in the current version of this document ([Annex 3](#)).

5.6 Involvement of vulnerable individuals/ groups and measures to prevent enhancing their vulnerability/ stigmatisation

Partners are fully converse with the procedures on the identification and recruitment of research participants in the specific context of vulnerable groups, as well as more broadly. The DAISY consortium partners ensures all employed researchers are trained to be sensitive to the fact that additional care is imperative when working with vulnerable people and children.

It is not anticipated that the core members of the five seed innovation case studies will include 'vulnerable individuals or groups'. However, given that the case studies are being supported in pursuing various amplification orientated activities, the involvement of vulnerable individuals or groups remains currently a possibility. Further information on this, including the types of vulnerable individuals or groups, will be included in Version 3.0 of this DMP (if applicable) (and any associated institutional level ethical approval amendments secured). Notably, though, any participants drawn from such groups will be limited either to persons able to give informed consent, or persons accompanied throughout by guardians with legal qualification to give consent on their behalf (e.g. in the case of a minor, parental consent and/or consent of Teacher (where legal authority held to do so)).

Given the potential for individuals from vulnerable groups to possess lower than average educational qualifications or training, all DAISY researchers are aware that it is particularly important to check whether participants need any additional support to understand the purpose of the research, data management, and particulars of consent.

5.7 Incidental findings policy

The term 'incidental findings' is used here to refer to sensitive findings which arise during the collection of research data, but which do not directly relate to the aims of the study. An incidental finding could include (for example) a disclosure about criminal activity. Due to the focus of the DAISY research and methods of data collection (primarily qualitative; non-medical), it is anticipated that incidental findings are unlikely to arise. In the event, however, that the DAISY research does

produce incidental findings, the following procedure will apply. (This procedure is in direct accordance with the Coventry University 'Reporting Disclosure Protocol and Guidance on Result Feedback'):

Prior to undertaking any research, individual partner institutions are required to assess the likelihood of sensitive incidental findings becoming known, and document how they will be dealt with in accordance with the incidental findings policy of DAISY. The information sheet to be provided to research participants at the outset (in accordance with the procedure for informed consent (see below)) makes reference to the incidental findings policy to be adhered to by all DAISY researchers.

During data collection, in the event that an incidental finding does arise, the researcher is instructed to follow the following Coventry University protocol:

- ☛ You realise the seriousness of the information;
- ☛ End the method of data collection (dependent on the situation, either when it's safe to do so or explain why you cannot progress).
- ☛ Record any relevant notes.
- ☛ Contact the most senior level non-involved person/manager immediately or as soon as safe to do so.

In accordance with the above, the researcher is obliged to inform their line manager and/or relevant senior personnel of the occurrence and to seek immediate advice from the lead representative of the ethics research committee in their host institution. The local ethics committee (and where relevant, legal representatives within the host institution) would then inform the researcher of any statutory legal and ethical requirement to disclose the finding to a relevant third party (for example, the police force of that nation). In parallel, the researcher is also required to inform the DAISY Ethics Committee of the incident. In the event that a researcher's host partner institution does not have an ethics research committee, they are required to report directly to/ seek advice from the DAISY Ethics Committee. In such a case the DAISY Ethics Committee will act in accordance with the incidental findings policy of Coventry University. All occurrences of incidental findings will be securely stored on file in accordance with the wider Data Management Policy of DAISY and made available to the REA upon request.

5.8 Securing consent/ assent in the case of children and adults unable to give informed consent

DAISY research is limited only to persons able to give informed consent or persons accompanied throughout by guardians with legal qualification to give consent on their behalf.

5.9 Research 'in the field'

In accordance with the Grant Agreement, and the standard ethical research practice procedure of Coventry University, all researchers are required to abide by recognised procedures which are established and approved by the Ethics Committee to help keep researchers and subjects safe in the field. These guidelines include:

- ✚ Keeping careful notes of all research engagements.
- ✚ Ensuring that a designated contact person within the host institution has full details of where the researcher is, as well as expected start and completion time.
- ✚ Using mobile phones to keep in touch with the research base.
- ✚ Reporting any health and safety incidents.

Risk assessment constitutes an integral part of the ethics review process within DAISY. As employees, all researchers are fully insured (for working nationally and internationally) through their host partner institutions for all activities undertaken in accordance with their employment and research position (including all fieldwork activity). It is the responsibility of the individual consortium partner institutions, and of the individual researchers, to ensure full compliance.

5.10 Protection of personal data

The research involves personal data collection and processing, including 'special categories of personal data' (formally known as 'sensitive data'). The research also involves further processing of previously collected personal data (secondary use) (for further information on personal data processing, please see section on GDPR below).

The term 'data' is used here to refer to all results from research activities - varying from interview recordings and transcripts, to individual logbooks with observations and protocols, to scenario and learning history workshops, to various mixes of research-based interventions (WP3, WP4), to secondary data already available in the public domain.

Where personal data collection is required, it may include characteristics of gender, income, education attainment, affiliation, personal values and opinions.

In accordance with GDPR and national data protection law, where the collection of personal data is required, the relevant DAISY consortium partner ensures that:

1. Personal data is processed fairly and lawfully
 - ☛ Personal data is obtained only for one or more specified and lawful purpose(s), and is not further processed in any manner incompatible with that purpose or those purposes
 - ☛ Personal data is adequate, relevant and not excessive in relation to the purpose or purposes for which it is processed
2. Personal data is accurate and, where necessary, kept up to date
3. Personal data processed for any purpose or purposes is not kept for longer than necessary for that purpose or those purposes
4. Personal data is processed in accordance with the rights of data subjects in accordance with national data protection law
5. Appropriate technical and organisational measures are taken against unauthorised or unlawful processing of personal data and against accidental loss or destruction of, or damage to, personal data
 - ☛ Personal data is not transferred to a country or territory outside the European Economic Area unless that country or territory ensures an adequate level of protection for the rights and freedoms of data subjects in relation to the processing of personal data
6. Data sharing with third parties will be limited to anonymised processed data only, with no GDPR sensitive raw data shared

For the processing of 'special categories of personal data' (formally known as 'sensitive data') the following additional conditions also apply:

7. The data subject has given their explicit consent to the processing of the personal data
8. Use of the data is in the substantial public interest, necessary for research purposes and neither supports measures or decisions with respect to any

particular individual, nor is likely to cause substantial damage or substantial distress to any person

5.11 Confirmation of authorisation

Where individual case studies involve the collection of personal data, prior authorisation has been secured from the associated ethics review committee or institutional data protection officer of the partner institution at which the researcher is employed (or where this does not exist, from Coventry University), and/or, where required, also from the national data protection authority. Authorisation has been secured in accordance with the GDPR, and with national law. Copies of the authorisation will be kept on file and will be submitted upon request to the REA.

5.12 Justification of personal data collection

To be considered for approval any application for personal data collection is supported by full and detailed justification of the reason as to why collection and/or processing of personal data is required. The justification is submitted to the associated ethics review committee or institutional data protection officer of the institution at which the researcher is employed, and where required, to the national data protection authority. Copies of the justification case will be kept on file and will be submitted upon request to the REA.

5.13 Templates of informed consent and information sheet

The informed consent forms and participant information sheet will be kept on file and will be submitted upon request to the REA. Copies of both templates are included in Annex 3.

5.14 Publicly available data

Where personal data is collected and used, and such data is publicly available, the researcher is required to explicitly confirm that the data was already publicly available.

5.15 Data not publicly available

Where personal data is collected and used and such data is not publicly available, the researcher is required to secure relevant authorisation prior to its collection and use. Authorisation is secured in accordance with the GDPR on data protection, and with national law. Copies of the authorisation will be kept on file and will be submitted upon request to the REA.

6 Third Countries

6.1 Conformity with Horizon Europe, European Union, national and international legislation

Of the five individual seed innovation case studies, one involves data collection in a country outside the European Union – referred to here as a ‘third country’:

- For the case study ‘Digital apps for education, citizen science and societal engagement with nature in urban settings’ the ‘third country’ is the UK.

Notably, the lead individuals within the research institution undertaking data collection in the UK case study (CU) have considerable existing personal experience and knowledge of undertaking data collection in compliance with both national and European Union regulatory and ethical protocols.

6.2 Authorisation for importing of research data to the European Union

For the case study project anticipated to involve data collection in a ‘third country’ (UK), in accordance with national and international agreement on data sharing, the following procedures are being followed:

Should personal data needs to be transferred out of the third country and into the European Union, consent will first be obtained from the data subject and, where relevant in accordance with national legislation, authorisation from the relevant governing research body. CU will keep on file, and submit upon request to the REA, such authorisation. In addition to gaining

authorisation to export data, the consortium partner (CU) will also adhere to all aspects of the DAISY policy for the collection of personal data (see above).

7 Data Management and the GDPR

As of May 2018, the General Data Protection Regulation came into effect, the main principles of which (Article 5 of the GDPR) are integrated to the DAISY DMP as follows.

7.1 Personal data must be processed fairly and transparently

“Personal data shall be processed lawfully, fairly and in a transparent manner in relation to the data subject”.

DAISY follows Coventry University's strict policy on GDPR and Data Protection that details how personal data collection should be consented, what forms and documents to use, what information is to be provided for the data subject, and how the data will be secured and managed. The request also informs individuals of their rights to have data updated or removed, and the project's policies on how these rights are managed. Only store relevant data is stored, with unused and redundant data purged. Besides, personal data is anonymised or pseudonymised wherever possible (in accordance also with the nature of the informed consent provided by each individual data subject).

The consortium will continue to be fully transparent in the collection of personal data. When collecting data a participant information sheet and consent form is provided, containing relevant information on data use, the data collection methods and processes, the purpose of the research and the way of dissemination as well as open access. The data subjects will be informed about the possibility to withdraw their data, as well as their rights to request information on the types of data stored about them.

7.2 Personal data can only be collected for specified, explicit and legitimate purposes

“Personal data shall be collected for specified, explicit and legitimate purposes and not further processed in a manner that is incompatible with those purposes”.

DAISY does not collect any (personal) data that is not within the scope of the project.

7.3 Personal data must be adequate, relevant and limited to what is necessary for processing

“Personal data shall be adequate, relevant and limited to what is necessary in relation to the purposes for which they are processed”.

Only data relevant to the project's research is being collected. Nevertheless, it may occur that during the data collection, additional personal information is shared by the research subject that was not originally intended to be collected by the project. In such case, data will either be purged, or if somehow relevant to the research, anonymised, and after adequate consent, further processed.

7.4 Personal data must be accurate and kept up to date

“Personal data shall be accurate and, where necessary, kept up to date”.

Personal data, where required to be retained in accordance with the specific objectives and rational of the research, will be regularly reviewed to ensure accuracy. However, in cases where the datasets are difficult to subsequently keep up to date, anonymisation and relevant processing of data will continue to be opted for. In addition, datasets are processed as accurately as possible, with the use of indicating parameters that help with accurate data (e.g. marking the relevant year in datasets).

7.5 Personal data must be kept in a form such that the data subject can be identified only as long as it is necessary for processing

“Personal data shall be kept in a form which permits identification of data subjects for no longer than is necessary for the purposes for which the personal data are processed”.

All personal data that are no longer in use for specific research purpose will be purged as soon as they are not needed. Accordingly, also all personal data will be made anonymous once data has been processed, while it will be ensured during anonymisation that no individual can be identified. At the end of the project, the anonymised data sets will be stored in open repositories. If data cannot be made anonymous, it will be pseudonymised as much as possible and stored according to project and institutional guidance archiving rules and data policy.

7.6 Personal data must be processed in a manner that ensures its security

“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”.

All personal data will continue to be handled in accordance with relevant security protocols. Accordingly, personal data will only be stored on a secure institutional server (e.g. Microsoft Teams hosted by Coventry University, or similar server by other host institutions) complying with GDPR and additional data protection, where access (via Multi-Factor Authentication) is managed by the project manager and university IT expert and only provided to authorised personnel and the partners of the project. Access can be limited and withdrawn immediately if needed. Additional people will not have access to these data. At the Microsoft Teams site, the only personal data stored and shared, will be that which a priori were consented by the data subject. Such data are forbidden to be downloaded or stored in a non-secure place. Personal data are only stored for project reporting purposes and will be



deleted as soon as they become unnecessary. Personal data will not be otherwise shared apart from via the Microsoft Teams server.

7.7 The controller's responsibility

“The controller is responsible for, and must be able to demonstrate, compliance with the Data Protection Principles and for securing the same assurances from any 3rd parties.”

At project level, the project management and coordination team are responsible for the correct data management within the project, which will be regularly checked. At each host institution, DAISY research team members are responsible for data management and sharing, and accountable for managing and securing personal data sets. Besides, all members of DAISY will liaise with relevant bodies of data management and ethical committees in terms of complying with the GDPR and additional data privacy and protection regulations.

Annex 1

Case Study Level Data Management Plans

DATA MANAGEMENT PLAN OF DAISY CASE STUDY 1:

Digital apps for education, citizen science and societal engagement with nature in urban settings of the UK (CU)

1. Data summary

For each DAISY case study, the following 'data summary' text provides an overview of the purpose, nature, and intended use of the data generated. The sub-sections outline what data are collected, how they are produced, and who they are expected to be useful for within and beyond the project.

1.1 Purpose of data collection/generation

The purpose of data collection in the UK case study is to support analysis of the Coventry–Warwickshire–Solihull City Nature Challenge (CWS-CNC). CWS-CNC is a place-based, socio-technical seed innovation centred on the use of the iNaturalist digital citizen science platform. Data collection is being undertaken to advance understanding of (i) how CNC participation is organised and governed at a local authority and CNC local area partnership level, (ii) how the iNaturalist platform shapes patterns of participation and biodiversity recording, and (iii) how any tensions between public engagement, data quality and scientific validation are managed in practice. The data also support (iv) reflective learning on the adaptive development of the CWS-CNC over time, including the introduction and testing of intervention mixes aimed at enhancing both biodiversity outcomes and more equitable forms of participation and access. In line with the DAISY project objectives, the case study contributes evidence relevant to the urban and regional development and education domains, particularly in relation to the distribution of opportunities for engagement with biodiversity knowledge and decision-making.

1.2 Types and formats of data generated/collected

The UK case study draws on three main categories of data: (i) citizen science biodiversity data generated during the CNC through iNaturalist, including geo-referenced species observations, photographs, timestamps, user identifications and validation status (e.g. 'research grade' classifications). This data is generated and held outwith the project via the iNaturalist platform and app; (ii) qualitative and image-based research data, consisting of semi-structured interview audio recordings and transcripts, learning history workshop documentation, Three-Horizons workshop documentation, images (photos) and potentially also researcher fieldnotes. These data are stored in standard qualitative research formats (audio, text documents, and image files); (iii) supplementary contextual data are collected through desk-based review of publicly available CNC and iNaturalist statistics, event materials, and potentially also locally relevant strategy or policy documents referenced by case holders. These data are retained as text files, PDFs, spreadsheets, or web-derived records where appropriate.

1.3 Outline the data utility: to whom will it be useful

The data will be useful to the DAISY consortium for cross-case analysis of socio-technical innovation, citizen science, and biodiversity governance, with particular relevance to understanding how digital interventions shape participation and outcomes across different contexts. They provide an empirical basis for foresight and amplification activities focused on learning dynamics, digital participation, and the distributional implications of intervention mixes for biodiversity and equity. The data will also be relevant to local authorities, environmental organisations, and citizen science practitioners involved in organising or supporting CNC and other bioblitz-type initiatives, including specifically (e.g.) in relation to trade-offs between engagement, data quality and inclusivity, when using platforms such as iNaturalist. More broadly, the biodiversity observation data generated through iNaturalist retain value for the wider research and conservation community, contributing to open biodiversity knowledge infrastructures while remaining subject to platform-specific validation, licensing and reuse conditions.

2. FAIR data

Across all DAISY case studies, data management follows the FAIR principles to ensure that datasets are discoverable, clearly identifiable, and consistently described. Findability is supported through structured metadata, standardised naming conventions, and the use of persistent identifiers where data are deposited in external repositories. Metadata is made available, alongside the openly accessible data, and maintained throughout the data lifecycle to ensure traceability across project tasks, deliverables and publications.

2.1. Making data findable, including provisions for metadata

2.1.1 Discoverability of data (metadata provision)

Each openly accessible dataset is accompanied by descriptive metadata sufficient to enable discovery, interpretation, and reuse. Metadata include, as a minimum, dataset title, dataset type, description, creator(s), date of creation or data collection, version number, and access or reuse conditions. Where relevant, metadata also include information on data collection methods, spatial or temporal scope, and contextual details required for informed reuse.

Metadata records are stored alongside the data within the main repository (e.g. Zenodo metadata fields), via the DAISY website, and as part of project documentation, ensuring that datasets can be located and understood independently of the individuals who generated them.

2.1.2 Identifiability of data

Datasets are uniquely identifiable through consistent titling, versioning and (where applicable) repository-assigned persistent identifiers. Datasets deposited in Zenodo are assigned a DOI, which provides longterm, persistent identification and citation. Version numbers are used systematically to distinguish between dataset updates and revisions.

2.1.3 Naming conventions

All DAISY datasets uploaded to Zenodo follow a common project-wide naming convention to ensure consistency, clarity and findability. Dataset titles and file names are structured to include the project acronym, dataset type, date, version and file type.

☛ Titles follow the structure:

[ProjectAcronym] [DatasetType] [YYYYMMDD] [Version] [FileType]

☛ File names follow the structure:

[ProjectAcronym]_[DatasetType]_[YYYYMMDD]_[Version]_[FileType]

Dataset type descriptors use clear, human-readable wording, and file names use underscores instead of spaces. Dates are recorded in ISO format (YYYYMMDD), versioning follows a consistent “vX” format, and special characters are avoided. These conventions are applied consistently across all case studies and openly accessible dataset versions to support efficient data management and reuse.

2.2. Making data openly accessible

2.2.1 Data to be made openly available

For the UK case study, openly available data include (i) aggregated and publicly accessible biodiversity observation data generated through the CWS-CNC via the iNaturalist platform, and (ii) non-identifiable qualitative outputs derived from the research, including such as synthesised learning history narratives, workshop data, Three-Horizons visioning, where these can be shared without compromising participant confidentiality.

2.2.2 Data availability

Openly accessible data will be uploaded to ZENODO and tagged to form part of the DAISY community project data collection. The repository is OpenAIRE compliant.

For the UK case study, biodiversity observation data generated through the CWS-CNC are made available via the iNaturalist platform, where they are publicly accessible subject to iNaturalist’s data licensing, validation status and platform-specific access conditions (rather than being re-uploaded to Zenodo).

2.3. Making data interoperable

2.3.1 Data interoperability

Openly accessible data will be structured and documented to support interoperability across systems, platforms and research contexts. Open, commonly used file formats will be employed wherever possible (e.g. plain text, PDF, CSV, standard audio formats), and datasets will be accompanied by clear metadata

aligned with recognised standards. The use of consistent metadata fields, controlled vocabularies where appropriate, and stable identifiers, enables data from different case studies to be combined, compared, or interpreted within wider analytical frameworks. Interoperability is further supported by depositing metadata and datasets in an OpenAIRE-compliant repository (Zenodo), ensuring compatibility with European research infrastructures.

2.4. Making data reusable

2.4.1 Data licencing

Where data are made openly accessible, they will be released under clear and appropriate licences that specify conditions for reuse. Licences will be selected to balance openness with ethical, legal and contractual obligations, particularly for qualitative research involving human participants. Licensing information will be clearly indicated in metadata records to ensure transparency for potential reuse.

2.4.2 Date of data availability

Data suitable for open access sharing will be made available as soon as practicable following completion of data collection, analysis, and necessary quality checks. Where relevant, data release may follow an embargo period – project month 35 – to allow for primary analysis and reporting. The timing of data availability will be documented in metadata and project documentation to ensure clarity for secondary users.

2.4.3 Reuse of data by third parties

Reuse of data by third parties is encouraged where data are openly available and subject to the stated access conditions and licences. Users are expected to acknowledge the DAISY project as the data source and to respect any ethical, legal, or contextual limitations associated with the data. For qualitative materials, reuse is typically limited to non-identifiable outputs, as raw data may be restricted to protect participant confidentiality.

2.4.4 Reuse time limit

There are no fixed time limits placed on the reuse of openly available DAISY datasets. Data deposited in trusted repositories are intended for long-term preservation and reuse, subject to repository policies and the terms of the

applicable licences. Where access restrictions apply, these are defined by ethical approvals, consent agreements, or legal requirements rather than temporal limits.

3. Data security

Data security procedures are implemented by all consortium partners (as applicable) to ensure that all data generated within the DAISY case studies are stored, accessed and managed in a manner that safeguards confidentiality, integrity and availability. Particular attention is given to data arising from the involvement of human participants, in line with ethical approvals, data protection requirements and institutional policies of the respective lead local partner and the overarching consortium-level DMP.

3.1 Secure storage, data recovery and transfer of sensitive data

3.1.1 Types of data to stored

Data being stored include qualitative research materials such as interview audio files, transcripts, workshop notes and analytical documents, as well as visual data (images, videos) associated administrative and metadata records. Sensitive data are limited to research data involving human participants and are handled in accordance with consent agreements and data protection regulations.

3.1.2 Secure storage of data

All research data are stored on secure, access-controlled institutional systems managed by the relevant consortium partner. Access is restricted to authorised members of the research team and protected through password-controlled accounts and institutional security protocols. Regular backups and data recovery procedures are in place in line with institutional policies to minimise the risk of data loss. Where third-party platforms or repositories are used, their security provisions are relied upon in accordance with their published policies.

3.1.3 Transfer of sensitive data

No transfer of sensitive data is envisaged.

4. Ethical aspects

The UK case study is conducted in accordance with the ethical approval granted for the DAISY project by **Coventry University (Reference: P185462)**. All data



collection activities undertaken within the UK case study fall within the scope of this approval and are designed to comply with institutional research ethics policies and applicable data protection regulations.

The UK case study involves qualitative research with human participants, including interviews, workshops, participant observation, and engagement with citizen science activities (predominantly in the context of the CNC and via use of iNaturalist). Participation is voluntary and based on informed consent, with participants provided with clear information about the purpose of the research, their role within it, and the intended use of the data. Participants are informed of their right to withdraw from the study and to request removal of their data in accordance with the procedures outlined in the ethics approval.

Personal and special category data collected as part of the UK case study (e.g. demographic information used to monitor inclusivity and diversity of engagement) are minimised, stored securely, and shared only in processed or anonymised form. No personally identifiable information is included in publicly accessible outputs. Qualitative research outputs are reported in a way that protects confidentiality, unless participants explicitly consent to attribution.

Citizen science biodiversity data associated with the UK case study are generated via the iNaturalist platform. These data are created and hosted under iNaturalist's own terms of use and consent processes, which operate independently of Coventry University. The research makes use only of publicly accessible biodiversity observation data and does not collect or process personally identifiable information from the platform. Ethical considerations relating to data access, confidentiality, and reuse are addressed through reliance on platform governance and the project's approved data management procedures.

DATA MANAGEMENT PLAN OF DAISY CASE STUDY 2: A Hungarian results-based agri-environmental pilot scheme backed by a mobile app for Farmers (ESSRG)

1. Data summary

For each DAISY case study, the following 'data summary' text provides an overview of the purpose, nature, and intended use of the data generated. The sub-sections outline what data are collected, how they are produced, and who they are expected to be useful for within and beyond the project.

1.1 Purpose of data collection/generation

The purpose of data collection in the Hungarian case study conducted by ESSRG is to support the analysis of the piloting and testing process of the first Hungarian results-based payment scheme. Data collection is being undertaken to advance understanding of how the scheme is designed and implemented, and how its social and technological dimensions contribute to biodiversity conservation outcomes. The research also seeks to examine how results-based approaches influence farmers' agency, self-monitoring practices, and the integration of local and traditional ecological knowledge into agri-environmental management. The collected data will support reflective learning on the development of the scheme over time and provide evidence for local and national decision-makers regarding the wider implementation of results-based payments in Hungary. In line with the objectives of the DAISY project, the case study also contributes to amplification activities by identifying transferable lessons and best practices that may inform similar initiatives in other regions of the country and possibly other sectors.

1.2 Types and formats of data generated/collected

In this case study the research team predominantly collects qualitative data, as follows:

- ☛ Interview data collected through qualitative, semi-structured interviews with farmers, national park representatives, and policy experts (notes, recordings, and written transcripts)

- ☛ Workshop data collected through online or in-person workshops (i.e., learning history, Three-Horizons and amplification workshops) and reported in the form of written summaries based on the collection of post-it notes, voice recording and/or note-taking
- ☛ Observation data collected during field excursion and monitoring transects (written summaries and photographs). Researchers – and potentially some local participants – will also test the iNaturalist application to collect monitoring data in a systematic way.
- ☛ Background information on the wider policy and social context, as well as on best practice examples across Europe, based on literature review and desk-based research.

In addition to the above mentioned qualitative data, the case study supports the collection of quantitative (survey) data requested by Task 3.2 and Task 3.3 of the project.

1.3 Outline the data utility: to whom will it be useful

The data will be useful to the DAISY consortium for cross-case analysis of biodiversity governance, socio-technical innovation, and amplification processes related to results-based payment schemes. They will provide an empirical basis for comparative learning on farmers' self-monitoring, local knowledge integration, and biodiversity conservation outcomes. The data will also be relevant to local decision-makers and organisations supporting farmers by providing evidence on the reliability and practical implications of self-monitoring approaches. At the national level, the findings may inform discussions on the wider implementation of results-based payment schemes, including their effectiveness and cost-benefit aspects. More broadly, the results will be valuable for practitioners, researchers, and policymakers in Órség, other regions of Hungary, and Europe interested in adapting or amplifying similar approaches for biodiversity conservation and agri-environmental management.

2. FAIR data

Across all DAISY case studies, data management follows the FAIR principles to ensure that datasets are discoverable, clearly identifiable, and consistently described. Findability is supported through structured metadata, standardised

naming conventions, and the use of persistent identifiers where data are deposited in external repositories. Metadata is made available, alongside the openly accessible data, and maintained throughout the data lifecycle to ensure traceability across project tasks, deliverables and publications.

2.1. Making data findable, including provisions for metadata

2.1.1 Discoverability of data (metadata provision)

Each openly accessible dataset is accompanied by descriptive metadata sufficient to enable discovery, interpretation, and reuse. Metadata include, as a minimum, dataset title, dataset type, description, creator(s), date of creation or data collection, version number, and access or reuse conditions. Where relevant, metadata also include information on data collection methods, spatial or temporal scope, and contextual details required for informed reuse.

Metadata records are stored alongside the data within the main repository (e.g. Zenodo metadata fields), via the DAISY website, and as part of project documentation, ensuring that datasets can be located and understood independently of the individuals who generated them.

2.1.2 Identifiability of data

Datasets are uniquely identifiable through consistent titling, versioning and (where applicable) repository-assigned persistent identifiers. Datasets deposited in Zenodo are assigned a DOI, which provides long-term, persistent identification and citation. Version numbers are used systematically to distinguish between dataset updates and revisions.

2.1.3 Naming conventions

All DAISY datasets uploaded to Zenodo follow a common project-wide naming convention to ensure consistency, clarity and findability. Dataset titles and file names are structured to include the project acronym, dataset type, date, version and file type.



Titles follow the structure:

[ProjectAcronym] [DatasetType] [YYYYMMDD] [Version] [FileType]



File names follow the structure:

[ProjectAcronym]_[DatasetType]_[YYYYMMDD]_[Version]_[FileType]

Dataset type descriptors use clear, human-readable wording, and file names use underscores instead of spaces. Dates are recorded in ISO format (YYYYMMDD), versioning follows a consistent “vX” format, and special characters are avoided. These conventions are applied consistently across all case studies and openly accessible dataset versions to support efficient data management and reuse.

2.2. Making data openly accessible

2.2.1 Data to be made openly available

Where consent, confidentiality and data protection requirements allow, openly available outputs from the Órség case study will include only anonymised, aggregated and non-identifiable qualitative materials and processed research outputs. These may include workshop reports, summaries of interviews and field excursions, interview and workshop guidelines, and other analytical or methodological materials that do not contain personal data or confidential stakeholder information.

Raw qualitative data, such as identifiable interview recordings, full transcripts, detailed field notes, or workshop materials containing personal data or sensitive contextual information, will not be made openly available. Openly shared materials will therefore be limited to processed outputs that support transparency, learning and potential reuse while safeguarding participant confidentiality, respecting informed consent, and complying with the project’s ethical approval and applicable data protection rules.

2.2.2 Data availability

Openly accessible data will be uploaded to ZENODO and tagged to form part of the DAISY community project data collection. The repository is OpenAIRE compliant.

2.3. Making data interoperable

2.3.1 Data interoperability

Openly accessible data will be structured and documented to support interoperability across systems, platforms and research contexts. Open, commonly used file formats will be employed wherever possible (e.g. plain text, PDF, CSV, standard audio formats), and datasets will be accompanied by clear metadata aligned with recognised standards. The use of consistent metadata fields,

controlled vocabularies where appropriate, and stable identifiers, enables data from different case studies to be combined, compared, or interpreted within wider analytical frameworks. Interoperability is further supported by depositing metadata and datasets in an OpenAIRE-compliant repository (Zenodo), ensuring compatibility with European research infrastructures.

2.4. Making data reusable

2.4.1 Data licencing

Where data are made openly accessible, they will be released under clear and appropriate licences that specify conditions for reuse. Licences will be selected to balance openness with ethical, legal, and contractual obligations, particularly for qualitative research involving human participants. Licensing information will be clearly indicated in metadata records to ensure transparency for potential reuse.

2.4.2 Date of data availability

Data suitable for open access sharing will be made available as soon as practicable following completion of data collection, analysis, and necessary quality checks. Where relevant, data release may follow an embargo period – project month 35 – to allow for primary analysis and reporting. The timing of data availability will be documented in metadata and project documentation to ensure clarity for secondary users.

2.4.3 Reuse of data by third parties

Reuse of data by third parties is encouraged where data are openly available and subject to the stated access conditions and licences. Users are expected to acknowledge the DAISY project as the data source and to respect any ethical, legal, or contextual limitations associated with the data. For qualitative materials, reuse is typically limited to non-identifiable outputs, as raw data may be restricted to protect participant confidentiality.

2.4.4 Reuse time limit

There are no fixed time limits placed on the reuse of openly available DAISY datasets. Data deposited in trusted repositories are intended for long-term preservation and reuse, subject to repository policies and the terms of the

applicable licences. Where access restrictions apply, these are defined by ethical approvals, consent agreements, or legal requirements rather than temporal limits.

3. Data security

Data security procedures are implemented by all consortium partners (as applicable) to ensure that all data generated within the DAISY case studies are stored, accessed and managed in a manner that safeguards confidentiality, integrity and availability. Particular attention is given to data arising from the involvement of human participants, in line with ethical approvals, data protection requirements and institutional policies of the respective lead local partner and the overarching consortium-level DMP.

3.1 Secure storage, data recovery and transfer of sensitive data

3.1.1 Types of data to stored

Data being stored include qualitative research materials such as interview audio files, transcripts, workshop notes and analytical documents, as well as visual data (images, videos) associated administrative and metadata records. Sensitive data are limited to research data involving human participants and are handled in accordance with consent agreements and data protection regulations.

3.1.2 Secure storage of data

All research data are stored on secure, access-controlled institutional systems managed by the relevant consortium partner. Access is restricted to authorised members of the research team and protected through password-controlled accounts and institutional security protocols. Regular backups and data recovery procedures are in place in line with institutional policies to minimise the risk of data loss. Where third-party platforms or repositories are used, their security provisions are relied upon in accordance with their published policies.

3.1.3 Transfer of sensitive data

No transfer of sensitive data is envisaged.

4. Ethical aspects

The Órség case study conducted by ESSRG is implemented in accordance with the overall ethical approval granted to the DAISY project by Coventry University

(Reference: P186955 – linked to P185462). The case study focuses on investigating and supporting the piloting and testing of the first Hungarian results-based agri-environmental payment scheme, with particular attention to its social-technological dimensions, equity implications, and potential to strengthen biodiversity-related outcomes. All research activities are carried out in line with the approved DAISY ethics framework, applicable GDPR requirements, national data protection rules, and ESSRG's internal research and data management procedures.

The case study involves qualitative and participatory research with human adult participants, including literature review, key informant interviews, in-person participatory workshops, and activities related to trialling an agri-environmental payment scheme, such as participatory or other forms of observation. Participation in interviews, workshops and related engagement activities is voluntary and based on informed consent. Participants are provided with clear information about the aims of the research, their role in the study, the intended use of the data collected, and their rights, including the right to withdraw from the research and to request deletion of their data in line with the procedures set out in the ethics approval.

The research process seeks to recognise and value farmers' local and practical knowledge, while avoiding extractive forms of engagement and ensuring that participants' contributions are treated with respect and confidentiality. Personal data are minimised, stored securely, and used only for clearly defined research purposes. Where findings are reported, data will be anonymised or pseudonymised wherever possible, and no personally identifiable information will be included in public outputs unless explicit consent for attribution has been obtained. The case study also aims to support a more equitable approach to agri-environmental governance by paying attention to farmers' agency, including the role of self-monitoring in reducing dependence on external actors and strengthening farmers' capacity to manage their own conservation practices.

DATA MANAGEMENT PLAN OF DAISY CASE STUDY 3: Urban-rural transformations through commons governance in Germany (MLU)

1. Data summary

For each DAISY case study, the following 'data summary' text provides an overview of the purpose, nature, and intended use of the data generated. The sub-sections outline what data are collected, how they are produced, and who they are expected to be useful for within and beyond the project.

1.1 Purpose of data collection/generation

The primary purpose of data collection in this case study is to investigate whether and to what extent new forms of commons governance emerging in Germany exhibit transformative potential. The research focuses on Community Supported Agriculture (CSA) and Consumer Cooperatives (CC) in the Halle-Leipzig area, examining how personal, political, and practical spheres of transformation address socio-economic inequalities and promote stronger attitudes towards nature and biodiversity. Data are collected to document and analyse the key biodiversity- and equity-relevant drivers and processes of urban-rural transformations through commons governance, and to understand how bottom-up initiatives succeed in institutionalising their practices through advocacy strategies and top-down support. Without empirical data from key stakeholders and their networks, the central research questions regarding transformative potential, amplification strategies, and the role of commons governance in reshaping food systems and land relations cannot be adequately addressed.

1.2 Types and formats of data generated/collected

Data generated in this case study are primarily qualitative in nature and include:

- ☛ Interview data: Audio recordings and written transcripts of semi-structured interviews with representatives of two CSA cooperatives and two CCs in the Halle-Leipzig area.

- ☛ Workshop and participatory research materials: Notes and summaries from participatory workshops and stakeholder engagement activities,
- ☛ Field notes and observational records: Written documentation from fieldwork and site visits.
- ☛ Administrative and contextual documents: Project-internal documents, consent forms, and metadata records.
- ☛ Visual data (where applicable): Photographs or other visual materials collected during fieldwork, subject to participant consent.

Data are stored in common open formats (e.g., plain text, PDF, JPEG, standard audio formats such as MP3 or WAV), to support long-term accessibility and interoperability.

1.3 Outline the data utility: to whom will it be useful

The data generated in this case study are expected to be of value to a range of audiences within and beyond the DAISY project:

- ☛ Within the DAISY project: The data directly inform comparative analyses across case studies, contributing to project deliverables, publications, and the development of cross-case insights on commons governance and socio-ecological transformations.
- ☛ Academic researchers: Scholars in the fields of commons governance, rural sociology, agri-food studies, sustainability transitions, and environmental social science will benefit from access to empirical data on emerging CSA and CC in Germany.
- ☛ Practitioners and civil society: Representatives of CSA initiatives, CCs, solidarity economy networks, and related self-organised groups can draw on findings and amplification strategies developed through the case study to strengthen their own practices and institutional reach.
- ☛ Policy makers: Data and outputs may inform policy discussions around land reform, food sovereignty, rural development, and community-based governance at regional, national, and European levels.
- ☛ Educators: Materials may be used in teaching contexts related to sustainability, cooperative governance, and rural-urban relations.

2. FAIR data

Across all DAISY case studies, data management follows the FAIR principles to ensure that datasets are discoverable, clearly identifiable, and consistently described. Findability is supported through structured metadata, standardised naming conventions, and the use of persistent identifiers where data are deposited in external repositories. Metadata is made available, alongside the openly accessible data, and maintained throughout the data lifecycle to ensure traceability across project tasks, deliverables and publications.

2.1. Making data findable, including provisions for metadata

2.1.1 Discoverability of data (metadata provision)

Each openly accessible dataset is accompanied by descriptive metadata sufficient to enable discovery, interpretation, and reuse. Metadata include, as a minimum, dataset title, dataset type, description, creator(s), date of creation or data collection, version number, and access or reuse conditions. Where relevant, metadata also include information on data collection methods, spatial or temporal scope, and contextual details required for informed reuse.

Metadata records are stored alongside the data within the main repository (e.g. Zenodo metadata fields), via the DAISY website, and as part of project documentation, ensuring that datasets can be located and understood independently of the individuals who generated them.

2.1.2 Identifiability of data

Datasets are uniquely identifiable through consistent titling, versioning and (where applicable) repository-assigned persistent identifiers. Datasets deposited in Zenodo are assigned a DOI, which provides long-term, persistent identification and citation. Version numbers are used systematically to distinguish between dataset updates and revisions.

2.1.3 Naming conventions

All DAISY datasets uploaded to Zenodo follow a common project-wide naming convention to ensure consistency, clarity and findability. Dataset titles and file names are structured to include the project acronym, dataset type, date, version and file type.

☛ Titles follow the structure:

[ProjectAcronym] [DatasetType] [YYYYMMDD] [Version] [FileType]

☛ File names follow the structure:

[ProjectAcronym]_[DatasetType]_[YYYYMMDD]_[Version]_[FileType]

Dataset type descriptors use clear, human-readable wording, and file names use underscores instead of spaces. Dates are recorded in ISO format (YYYYMMDD), versioning follows a consistent “vX” format, and special characters are avoided. These conventions are applied consistently across all case studies and openly accessible dataset versions to support efficient data management and reuse.

2.2. Making data openly accessible

2.2.1 Data to be made openly available

Due to data protection, it is not planned to make research data from the German case study cluster fully available to everyone. However, where consent, confidentiality and data protection requirements allow and the data integrity is not compromised, anonymised or non-identifiable qualitative materials and processed research outputs will be made available. These may include synthesised Learning History narratives, Three Horizons workshop documentation (including anonymised poster outputs and digitised Miro boards), TRD2 assessment results in non-attributable form, analytical summaries of horizon work and Transformative Intervention Mix (TIM) discussions across the four sub-cases (Rübchen, Gemüsehof Naderkau, Koope, KoLa), and other processed materials that do not reveal personal data or confidential stakeholder information.

Raw qualitative data such as identifiable workshop transcripts, audio recordings, or materials containing personal data or statements attributable to individual participants will not be made openly available unless they can be fully anonymised and shared in accordance with informed consent, ethical approvals and applicable data protection rules, including GDPR. Openly shared materials will therefore focus on processed, non-identifiable outputs that can support transparency, learning and reuse without compromising participant confidentiality.

2.2.2 Data availability

Openly accessible data will be uploaded to ZENODO and tagged to form part of the DAISY community project data collection. The repository is OpenAIRE compliant.

2.3. Making data interoperable

2.3.1 Data interoperability

Openly accessible data will be structured and documented to support interoperability across systems, platforms and research contexts. Open, commonly used file formats will be employed wherever possible (e.g. plain text, PDF, CSV, standard audio formats), and datasets will be accompanied by clear metadata aligned with recognised standards. The use of consistent metadata fields, controlled vocabularies where appropriate, and stable identifiers, enables data from different case studies to be combined, compared, or interpreted within wider analytical frameworks. Interoperability is further supported by depositing metadata and datasets in an OpenAIRE-compliant repository (Zenodo), ensuring compatibility with European research infrastructures.

2.4. Making data reusable

2.4.1 Data licencing

Where data are made openly accessible, they will be released under clear and appropriate licences that specify conditions for reuse. Licences will be selected to balance openness with ethical, legal, and contractual obligations, particularly for qualitative research involving human participants. Licensing information will be clearly indicated in metadata records to ensure transparency for potential reuse.

2.4.2 Date of data availability

Data suitable for open access sharing will be made available as soon as practicable following completion of data collection, analysis, and necessary quality checks. Where relevant, data release may follow an embargo period – project month 35 – to allow for primary analysis and reporting. The timing of data availability will be documented in metadata and project documentation to ensure clarity for secondary users.

2.4.3 Reuse of data by third parties

Reuse of data by third parties is encouraged where data are openly available and subject to the stated access conditions and licences. Users are expected to acknowledge the DAISY project as the data source and to respect any ethical, legal, or contextual limitations associated with the data. For qualitative materials, reuse is typically limited to non-identifiable outputs, as raw data may be restricted to protect participant confidentiality.

2.4.4 Reuse time limit

There are no fixed time limits placed on the reuse of openly available DAISY datasets. Data deposited in trusted repositories are intended for long-term preservation and reuse, subject to repository policies and the terms of the applicable licences. Where access restrictions apply, these are defined by ethical approvals, consent agreements, or legal requirements rather than temporal limits.

3. Data security

Data security procedures are implemented by all consortium partners (as applicable) to ensure that all data generated within the DAISY case studies are stored, accessed and managed in a manner that safeguards confidentiality, integrity and availability. Particular attention is given to data arising from the involvement of human participants, in line with ethical approvals, data protection requirements and institutional policies of the respective lead local partner and the overarching consortium-level DMP.

3.1 Secure storage, data recovery and transfer of sensitive data

3.1.1 Types of data to stored

Data being stored include qualitative research materials such as interview audio files, transcripts, workshop notes and analytical documents, as well as visual data (images, videos) associated administrative and metadata records. Sensitive data are limited to research data involving human participants and are handled in accordance with consent agreements and data protection regulations.

3.1.2 Secure storage of data

All research data are stored on secure, access-controlled institutional systems managed by the relevant consortium partner. Access is restricted to authorised

members of the research team and protected through password-controlled accounts and institutional security protocols. Regular backups and data recovery procedures are in place in line with institutional policies to minimise the risk of data loss. Where third-party platforms or repositories are used, their security provisions are relied upon in accordance with their published policies.

3.1.3 Transfer of sensitive data

No transfer of sensitive data is envisaged.

4. Ethical aspects

This case study has received ethical approval from the German Association for Experimental Economic Research e.V. (Gesellschaft für experimentelle Wirtschaftsforschung – GfEW) under Institutional Review Board Certificate No. IL9I3agY, issued on 30 April 2025 and valid until 30 April 2027 (Status: Approved; Review Level: Expedite). The certificate is publicly accessible at:

<https://gfew.de/ethik/IL9I3agY>

All research activities involving human participants are conducted in full compliance with the ethical standards and procedures of the GfEW, the legal requirements of the European Union (including GDPR), and the institutional policies of Martin Luther University Halle-Wittenberg (MLU). Participation in interviews and workshops is entirely voluntary, and informed consent is obtained from all participants prior to data collection. Participants are fully informed about the purpose of the research, how their data will be used, their right to withdraw at any time without consequence, and the measures in place to protect their confidentiality.

Data involving human participants are pseudonymised or anonymised prior to any sharing or publication, and raw qualitative data (e.g., identified interview transcripts) are accessible only to authorised members of the research team. No sensitive personal data beyond what is strictly necessary for the research purposes are collected. Any changes to the research protocol require a new ethics approval prior to implementation, in accordance with GfEW procedures.

DATA MANAGEMENT PLAN OF DAISY CASE STUDY 4: Mixing social-technological and governance innovations for green blue veining ambitions in the Netherlands (WR)

1. Data summary

For each DAISY case study, the following 'data summary' text provides an overview of the purpose, nature and intended use of the data generated. The sub-sections outline what data are collected, how they are produced, and who they are expected to be useful for within and beyond the project.

1.1 Purpose of data collection/generation

The purpose of data collection in the Dutch case is to support the project Measure your Landscape (MJL) and the collaboration within the pilot project of green-blue veining in Oudewater, NL. This seed innovation is focused on the qualitative monitoring of green blue veining in the MJL citizen science project. Data collection is being undertaken to advance understanding of how MJL is organised, how the volunteers work with the monitoring tool and how this tool can contribute to the management and improvement of green-blue veining landscape elements in the province of Utrecht. The data also support reflective learning on the adaptive development of MJL over time, including the introduction and testing of intervention mixes aimed at enhancing both biodiversity outcomes and more equitable forms of participation and access. In line with the DAISY project objectives, the case study contributes evidence relevant to the urban and regional development and education domains, particularly in relation to the distribution of opportunities for engagement with biodiversity knowledge and decision-making.

1.2 Types and formats of data generated/collected

The Dutch case study draws on three main categories of data: (i) citizen science biodiversity data generated through the monitoring tool MJL, including landscape elements, photographs, timestamps, user identifications, and validation status. This data is generated and held outwith the DAISY project via the MJL tool (ii) qualitative and image-based research data, consisting of semi-structured interview audio

recordings and transcripts, learning history workshop documentation, Three-Horizons workshop documentation, images (photos) and potentially also researcher fieldnotes. These data are stored in standard qualitative research formats (audio, text documents, and image files); (iii) supplementary contextual data are collected through desk-based review of available MJL and statistics, the publicly available [Dashboard Monitoring Network for Small Landscape Elements](#) (MKLE), workshop materials, and also locally relevant strategy or policy documents referenced by case holders. These data are retained as text files, PDFs, spreadsheets, or web-derived records where appropriate.

1.3 Outline the data utility: to whom will it be useful

The data will be useful to the DAISY consortium for cross-case synthesis of socio-technical innovation, citizen science, and biodiversity governance, with particular relevance to understanding how digital interventions shape participation and outcomes across different contexts. They provide an empirical basis for foresight and amplification activities focused on learning dynamics, digital participation, and the distributional implications of intervention mixes for biodiversity and equity. The data will also be relevant to our case holders, including with regards to relevant insights on volunteering experiences. More broadly, the monitoring data will be potentially informative for policymakers and organisations working in the domain of green-blue veining.

2. FAIR data

Across all DAISY case studies, data management follows the FAIR principles to ensure that datasets are discoverable, clearly identifiable, and consistently described. Findability is supported through structured metadata, standardised naming conventions, and the use of persistent identifiers where data are deposited in external repositories. Metadata is made available, alongside the openly accessible data, and maintained throughout the data lifecycle to ensure traceability across project tasks, deliverables and publications.

2.1. Making data findable, including provisions for metadata

2.1.1 Discoverability of data (metadata provision)

Each openly accessible dataset is accompanied by descriptive metadata sufficient to enable discovery, interpretation, and reuse. Metadata include, as a minimum, dataset title, dataset type, description, creator(s), date of creation or data collection, version number, and access or reuse conditions. Where relevant, metadata also include information on data collection methods, spatial or temporal scope, and contextual details required for informed reuse.

Metadata records are stored alongside the data within the main repository (e.g. Zenodo metadata fields), via the DAISY website, and as part of project documentation, ensuring that datasets can be located and understood independently of the individuals who generated them.

2.1.2 Identifiability of data

Datasets are uniquely identifiable through consistent titling, versioning and (where applicable) repository-assigned persistent identifiers. Datasets deposited in Zenodo are assigned a DOI, which provides long-term, persistent identification and citation. Version numbers are used systematically to distinguish between dataset updates and revisions.

2.1.3 Naming conventions

All DAISY datasets uploaded to Zenodo follow a common project-wide naming convention to ensure consistency, clarity and findability. Dataset titles and file names are structured to include the project acronym, dataset type, date, version and file type.

☛ Titles follow the structure:
[ProjectAcronym] [DatasetType] [YYYYMMDD] [Version] [FileType]

☛ File names follow the structure:
[ProjectAcronym]_[DatasetType]_[YYYYMMDD]_[Version]_[FileType]

Dataset type descriptors use clear, human-readable wording, and file names use underscores instead of spaces. Dates are recorded in ISO format (YYYYMMDD), versioning follows a consistent “vX” format, and special characters are avoided.

These conventions are applied consistently across all case studies and openly accessible dataset versions to support efficient data management and reuse.

2.2. Making data openly accessible

2.2.1 Data to be made openly available

For the Dutch case study, openly available data include non-identifiable qualitative outputs derived from the research, including such as synthesised learning history narratives, workshop data, Three-Horizons visioning, where these can be shared without compromising participant confidentiality.

2.2.2 Data availability

Openly accessible data will be uploaded to ZENODO and tagged to form part of the DAISY community project data collection. The repository is OpenAIRE compliant.

For the Dutch case study, monitoring data on landscape elements in the province of Utrecht are hosted and governed by the case studies' own platforms, rather than being stored on WR's project-managed servers. This applies for both the Province of Utrecht as well as MJL. They have their own infrastructure and data protection arrangements. The collected data is visualised in the Dashboard Monitoring Network for Small Landscape Elements (MKLE). This dashboard offers policymakers, ecologists, as well as citizens and farmers, insight into where restoration or reinforcement of the landscape is needed.

2.3. Making data interoperable

2.3.1 Data interoperability

Openly accessible data will be structured and documented to support interoperability across systems, platforms and research contexts. Open, commonly used file formats will be employed wherever possible (e.g. plain text, PDF, CSV, standard audio formats), and datasets will be accompanied by clear metadata aligned with recognised standards. The use of consistent metadata fields, controlled vocabularies where appropriate, and stable identifiers, enables data from different case studies to be combined, compared, or interpreted within wider analytical frameworks. Interoperability is further supported by depositing metadata and datasets in an OpenAIRE-compliant repository (Zenodo), ensuring compatibility with European research infrastructures.

2.4. Making data reusable

2.4.1 Data licencing

Where data are made openly accessible, they will be released under clear and appropriate licences that specify conditions for reuse. Licences will be selected to balance openness with ethical, legal, and contractual obligations, particularly for qualitative research involving human participants. Licensing information will be clearly indicated in metadata records to ensure transparency for potential reuse.

2.4.2 Date of data availability

Data suitable for open access sharing will be made available as soon as practicable following completion of data collection, analysis, and necessary quality checks.

Where relevant, data release may follow an embargo period – project month 35 – to allow for primary analysis and reporting. The timing of data availability will be documented in metadata and project documentation to ensure clarity for secondary users.

2.4.3 Reuse of data by third parties

Reuse of data by third parties is encouraged where data are openly available and subject to the stated access conditions and licences. Users are expected to acknowledge the DAISY project as the data source and to respect any ethical, legal, or contextual limitations associated with the data. For qualitative materials, reuse is typically limited to non-identifiable outputs, as raw data may be restricted to protect participant confidentiality.

2.4.4 Reuse time limit

There are no fixed time limits placed on the reuse of openly available DAISY datasets. Data deposited in trusted repositories are intended for long-term preservation and reuse, subject to repository policies and the terms of the applicable licences. Where access restrictions apply, these are defined by ethical approvals, consent agreements, or legal requirements rather than temporal limits.

3. Data security

Data security procedures are implemented by all consortium partners (as applicable) to ensure that all data generated within the DAISY case studies are stored, accessed and managed in a manner that safeguards confidentiality, integrity

and availability. Particular attention is given to data arising from the involvement of human participants, in line with ethical approvals, data protection requirements and institutional policies of the respective lead local partner and the overarching consortium-level DMP.

3.1 Secure storage, data recovery and transfer of sensitive data

3.1.1 Types of data to stored

Data being stored include qualitative research materials such as interview audio files, transcripts, workshop notes and analytical documents, as well as visual data (images, videos) associated administrative and metadata records. Sensitive data are limited to research data involving human participants and are handled in accordance with consent agreements and data protection regulations.

3.1.2 Secure storage of data

All research data are stored on secure, access-controlled institutional systems managed by the relevant consortium partner. Access is restricted to authorised members of the research team and protected through password-controlled accounts and institutional security protocols. Regular backups and data recovery procedures are in place in line with institutional policies to minimise the risk of data loss. Where third-party platforms or repositories are used, their security provisions are relied upon in accordance with their published policies.

3.1.3 Transfer of sensitive data

No transfer of sensitive data is envisaged.

4. Ethical aspects

The Dutch case study is conducted in accordance with the ethical approval granted for the DAISY project, by the WUR Research Ethics Committee (WUR-REC) (Approval number: 2025-111). The Committee concluded that the research deals with ethical issues in a satisfactory way and that it complies with the Dutch “Code of ethics for research in the social and behavioural sciences involving human participants”.

DATA MANAGEMENT PLAN OF DAISY CASE STUDY 5: Degrowth doughnut model and strategy for Budapest, Hungary (GF)

1. Data summary

For each DAISY case study, the following 'data summary' text provides an overview of the purpose, nature, and intended use of the data generated. The sub-sections outline what data are collected, how they are produced and who they are expected to be useful for within and beyond the project.

1.1 Purpose of data collection/generation

Data are being collected and generated to support the Budapest Degrowth Doughnut (BDD) case study as a participatory urban sustainability innovation within DAISY, with a specific focus on biodiversity, equity and systemic transformation in Budapest. The case study data support analysis of how the BDD was developed through co-creation among Budapest experts, and how the model can be further embedded in local policy and planning processes.

The purpose of data collection is also to document and assess the BDD learning history, the future transformation pathways explored through the Three-Horizons workshop, amplification potential and cost benefits of possible intervention mixes associated with the case. The data are used to assess biodiversity-relevant indicators in the city, support cost-benefit analysis of the case related interventions, and feed case-based insights into DAISY's broader research on intervention mixes, amplification pathways and policy recommendations.

1.2 Types and formats of data generated/collected

The Budapest case study generates and collects mainly qualitative and analytical data. These include semi-structured interview recordings and transcripts, workshop notes and visualisations, validation materials, learning history documentation, Three-Horizons workshop documentation, amplification related events documentation, indicator and cost and benefits related materials, and analytical notes developed during the case study process.

Data formats include audio files, text documents, spreadsheets, image files, presentation or workshop support materials, and other standard research and documentation formats used for participatory qualitative research and policy-oriented analysis. The case also includes structured analytical material prepared for cost-benefit analysis, such as intervention descriptions, indicative cost and benefit categories, proposed quantitative parameters, and references to relevant municipal or programme-level data sources

1.3 Outline the data utility: to whom will it be useful

These data will be useful to the DAISY consortium for cross-case comparison, methodological learning, and the development of evidence-based recommendations on how social, technological and governance innovations can support biodiversity and equity transformations. They will also support future DAISY tasks related to amplification, intervention mixes, and policy learning at local and wider governance levels.

At case-study level, the data will be useful for core-actors involved in the Budapest Degrowth Doughnut (BDD) process, especially GreenFormation, Corvinus University of Budapest, the Municipality of Budapest, Public Transport Company of Budapest, and other relevant municipal, academia, business or civil-society stakeholders. The materials can support more holistic planning, strategy development, monitoring, enforcement and communication around biodiversity, climate, mobility, housing, participation and other dimensions linked to the BDD framework.

More broadly, suitably anonymised and shareable outputs may also be useful to researchers, policymakers and practitioners interested in participatory urban transformation, doughnut-based planning, biodiversity-sensitive local policy, and socially just sustainability transitions.

2. FAIR data

Across all DAISY case studies, data management follows the FAIR principles to ensure that datasets are discoverable, clearly identifiable, and consistently described. Findability is supported through structured metadata, standardised naming conventions, and the use of persistent identifiers where data are deposited

in external repositories. Metadata is made available, alongside the openly accessible data, and maintained throughout the data lifecycle to ensure traceability across project tasks, deliverables and publications.

2.1. Making data findable, including provisions for metadata

2.1.1 Discoverability of data (metadata provision)

Each openly accessible dataset is accompanied by descriptive metadata sufficient to enable discovery, interpretation, and reuse. Metadata include, as a minimum, dataset title, dataset type, description, creator(s), date of creation or data collection, version number, and access or reuse conditions. Where relevant, metadata also include information on data collection methods, spatial or temporal scope, and contextual details required for informed reuse.

Metadata records are stored alongside the data within the main repository (e.g. Zenodo metadata fields), via the DAISY website, and as part of project documentation, ensuring that datasets can be located and understood independently of the individuals who generated them.

2.1.2 Identifiability of data

Datasets are uniquely identifiable through consistent titling, versioning and (where applicable) repository-assigned persistent identifiers. Datasets deposited in Zenodo are assigned a DOI, which provides long-term, persistent identification and citation. Version numbers are used systematically to distinguish between dataset updates and revisions.

2.1.3 Naming conventions

All DAISY datasets uploaded to Zenodo follow a common project-wide naming convention to ensure consistency, clarity and findability. Dataset titles and file names are structured to include the project acronym, dataset type, date, version and file type.



Titles follow the structure:

[ProjectAcronym] [DatasetType] [YYYYMMDD] [Version] [FileType]



File names follow the structure:

[ProjectAcronym]_[DatasetType]_[YYYYMMDD]_[Version]_[FileType]

Dataset type descriptors use clear, human-readable wording, and file names use underscores instead of spaces. Dates are recorded in ISO format (YYYYMMDD), versioning follows a consistent “vX” format, and special characters are avoided. These conventions are applied consistently across all case studies and openly accessible dataset versions to support efficient data management and reuse.

2.2. Making data openly accessible

2.2.1 Data to be made openly available

Where consent, confidentiality and data protection requirements allow, openly available outputs from the Budapest case study may include anonymised or non-identifiable qualitative materials and processed research outputs. These may include synthesised learning history narratives, non-identifiable workshop documentation, Three-Horizons visioning outputs, analytical summaries, indicator-related documentation, and other processed materials that do not reveal personal data or confidential stakeholder information.

Raw qualitative data such as identifiable interview recordings, full transcripts, or workshop materials containing personal data will not be made openly available unless they can be fully anonymised and shared in accordance with informed consent, ethical approvals and applicable data protection rules. Openly shared materials will therefore focus on processed, non-identifiable outputs that can support transparency, learning and reuse without compromising participant confidentiality

2.2.2 Data availability

Openly accessible data will be uploaded to ZENODO and tagged to form part of the DAISY community project data collection. The repository is OpenAIRE compliant.

2.3. Making data interoperable

2.3.1 Data interoperability

Openly accessible data will be structured and documented to support interoperability across systems, platforms and research contexts. Open, commonly used file formats will be employed wherever possible (e.g. plain text, PDF, CSV, standard audio formats), and datasets will be accompanied by clear metadata aligned with recognised standards. The use of consistent metadata fields,

controlled vocabularies where appropriate, and stable identifiers, enables data from different case studies to be combined, compared, or interpreted within wider analytical frameworks. Interoperability is further supported by depositing metadata and datasets in an OpenAIRE-compliant repository (Zenodo), ensuring compatibility with European research infrastructures.

2.4. Making data reusable

2.4.1 Data licencing

Where data are made openly accessible, they will be released under clear and appropriate licences that specify conditions for reuse. Licences will be selected to balance openness with ethical, legal, and contractual obligations, particularly for qualitative research involving human participants. Licensing information will be clearly indicated in metadata records to ensure transparency for potential reuse.

2.4.2 Date of data availability

Data suitable for open access sharing will be made available as soon as practicable following completion of data collection, analysis, and necessary quality checks. Where relevant, data release may follow an embargo period – project month 35 – to allow for primary analysis and reporting. The timing of data availability will be documented in metadata and project documentation to ensure clarity for secondary users.

2.4.3 Reuse of data by third parties

Reuse of data by third parties is encouraged where data are openly available and subject to the stated access conditions and licences. Users are expected to acknowledge the DAISY project as the data source and to respect any ethical, legal, or contextual limitations associated with the data. For qualitative materials, reuse is typically limited to non-identifiable outputs, as raw data may be restricted to protect participant confidentiality.

2.4.4 Reuse time limit

There are no fixed time limits placed on the reuse of openly available DAISY datasets. Data deposited in trusted repositories are intended for long-term preservation and reuse, subject to repository policies and the terms of the applicable licences. Where access restrictions apply, these are defined by ethical approvals, consent agreements, or legal requirements rather than temporal limits.

3. Data security

Data security procedures are implemented by all consortium partners (as applicable) to ensure that all data generated within the DAISY case studies are stored, accessed and managed in a manner that safeguards confidentiality, integrity and availability. Particular attention is given to data arising from the involvement of human participants, in line with ethical approvals, data protection requirements and institutional policies of the respective lead local partner and the overarching consortium-level DMP.

3.1 Secure storage, data recovery and transfer of sensitive data

3.1.1 Types of data to stored

Data being stored include qualitative research materials such as interview audio files, transcripts, workshop notes and analytical documents, as well as visual data (images, videos) associated administrative and metadata records. Sensitive data are limited to research data involving human participants and are handled in accordance with consent agreements and data protection regulations.

3.1.2 Secure storage of data

All research data are stored on secure, access-controlled institutional systems managed by the relevant consortium partner. Access is restricted to authorised members of the research team and protected through password-controlled accounts and institutional security protocols. Regular backups and data recovery procedures are in place in line with institutional policies to minimise the risk of data loss. Where third-party platforms or repositories are used, their security provisions are relied upon in accordance with their published policies.

3.1.3 Transfer of sensitive data

No transfer of sensitive data is envisaged.

4. Ethical aspects

The BDD case study is conducted under the ethical approval granted to the DAISY project by Coventry University (reference P187479, linked to P185462) and in accordance with applicable GDPR and national data protection rules. Participation in interviews, workshops and related engagement activities is voluntary and based



on informed consent, with participants receiving clear information on the purpose of the research, the use of the data collected, and their right to withdraw and request deletion of their data in line with the applicable procedures.

Where personal data are processed, GreenFormation will apply its internal data protection rules, including data minimisation, purpose limitation, secure storage on protected systems, and the use of anonymisation or pseudonymisation wherever possible. Personal data will be used only for clearly defined research and organisational purposes, will not be shared beyond the stated purpose without an appropriate legal basis, and will be retained only for as long as necessary under the consent terms and applicable legal obligations.

Annex 2

DATA MANAGEMENT PLAN OF TRD2

1. Data summary

The following text provides a comprehensive overview of the purpose, nature, and intended use of the data collected by the [Transformative Diagnostic Tool](#) (TRD2). The sub-sections outline what data are collected, how they are produced via user and expert inputs, and who they are expected to be useful for within and beyond the project ecosystem. The TRD2 is also accessible as an online self-assessment tool via the DAISY project website (mydaisy.eu). The tool is intended for users to complete their own self-assessment and download their personalised results. Users may voluntarily submit their name, email address, and details about their innovation to receive their results; this data is processed solely for that purpose and is not stored or used by DAISY for research. Personal data submitted via the online tool are handled solely to deliver the user's personalised results, in accordance with the DAISY Website Privacy Policy (Annex 4), under which GreenFormation Kft. acts as Data Controller.

1.1 Purpose of data collection/generation

The data framework for the TRD2 operationalises an evaluative architecture designed to assess and guide individual socio-technical and social-ecological innovations. By generating empirical data across the integrated domains of transformation, equity, and biodiversity, the tool systematically measures how closely localised initiatives align with long-term, systemic sustainability pathways. Rather than acting as a static inventory or retrospective review, TRD2 produces diagnostic metrics that expose where current organisational practices diverge from necessary 2050 future horizons. This analytical data generation helps researchers and practitioners bypass conventional, siloed reporting methods by highlighting the critical systemic leverage points where incremental project adjustments must give way to deep structural transformations. Data are collected primarily through the TRD2 online tool (mydaisy.eu), used both in remote self-assessment and in-person facilitated workshop settings. Where users submit personal details via the online

tool to receive their results, the handling of that data is governed by the DAISY Website Privacy Policy (Annex 4).

1.2 Types and formats of data generated/collected

The implementation of TRD2 generates three primary streams of research data managed within standard spreadsheet and digital visual formats. The foundational tier consists of quantitative multi-criteria scoring matrices recorded on a standardised 0–100 scale, capturing assessments across the tool's 11 core sub-dimensions using either the full 66-item index or the compressed 22-item core configuration. Every assessed item produces paired quantitative metrics tracking the current operational context alongside the projected potential for a 2050 future horizon. These primary inputs are processed through Multi-Criteria Decision Analysis algorithms to generate aggregated index data and multi-dimensional weightings. Accompanying these numerical values are qualitative textual rationales provided by the assessors to document the empirical reasoning behind each score. The final outputs comprise visual structural profiles, specifically multi-axis radar chart datasets generated as standard graphic or vector files to map the diagnostic variance between baseline realities and transformative ambitions.

1.3 Outline the data utility: to whom will it be useful

The data generated by the tool serve a dual function, guiding internal research deployment across the DAISY consortium while providing actionable benchmarks for external governance actors. Within the project ecosystem, TRD2 diagnostic profiles establish the empirical baseline for multiple interconnected work streams. The metrics directly inform the innovation mapping and expert validation workflows in Work Package 2, while providing the specific structural parameters required by Work Package 3 to co-design transformative intervention mixes. These diagnostic outputs establish the boundary conditions for case selection and scenario-building within Work Package 4, and serve as applied training material for stakeholder capacity-building modules in Work Package 5. Beyond the consortium, the tool's data provide sustainability practitioners and project architects with a diagnostic mirror to identify operational blind spots, particularly regarding distributional equity and specific species-to-landscape level biodiversity goals. Funding bodies and policy-makers can utilise these consolidated diagnostic profiles to evaluate portfolio

alignment with macro-level sustainability mandates, ensuring that public investments support deep systemic transitions rather than superficial optimisation.

2. FAIR data

For the TRD2 tool, data management follows the FAIR principles to ensure that datasets are discoverable, clearly identifiable, and consistently described.

Findability is supported through structured metadata, standardised naming conventions, and the use of persistent identifiers where data are deposited in external repositories. At present, aggregated outputs – including evaluation charts and diagnostic profiles – are made available through DAISY project reports and deliverables. Metadata will be made available alongside any openly accessible datasets as these are prepared for deposit and will be maintained throughout the data lifecycle to ensure traceability across project tasks, deliverables, and publications.

2.1. Making data findable, including provisions for metadata

2.1.1 Discoverability of data (metadata provision)

Each openly accessible dataset is accompanied by descriptive metadata sufficient to enable discovery, interpretation, and reuse. This documentation includes, at a minimum, the dataset title, dataset type, description, creator details, date of creation or collection, version control number, and formal reuse conditions. Where relevant, metadata also captures specific information on data collection methods, analytical boundaries, spatial or temporal scope, and contextual details required for informed reuse. At present, no datasets have been deposited in Zenodo. Aggregated outputs such as evaluation charts and diagnostic profiles have been shared through DAISY project reports and deliverables. No personal data or raw user data from the online tool is collected or retained by DAISY. The metadata records will be stored alongside openly accessible datasets within the Zenodo repository fields, via the DAISY project platform, and as part of formal project documentation, ensuring that datasets can be located and understood independently of the individuals who generated them.

2.1.2 Identifiability of data

Datasets are uniquely identifiable through consistent titling, versioning and (where applicable) repository-assigned persistent identifiers. Datasets deposited in Zenodo

are assigned a DOI, which provides long-term, persistent identification and citation. Version numbers are used systematically to distinguish between dataset updates and revisions.

2.1.3 Naming conventions

All DAISY datasets uploaded to Zenodo will follow a common project-wide naming convention to ensure consistency, clarity and findability. Dataset titles and file names are structured to include the project acronym, dataset type, date, version and file type.

☛ Titles follow the structure:

[ProjectAcronym] [DatasetType] [YYYYMMDD] [Version] [FileType]

☛ File names follow the structure:

[ProjectAcronym]_[DatasetType]_[YYYYMMDD]_[Version]_[FileType]

Dataset type descriptors use clear, human-readable wording, and file names use underscores instead of spaces. Dates are recorded in ISO format (YYYYMMDD), versioning follows a consistent “vX” format, and special characters are avoided. These conventions are applied consistently across all case studies and TRD2, and openly accessible dataset versions to support efficient data management and reuse.

2.2. Making data openly accessible

2.2.1 Data to be made openly available

For the TRD2 tool, openly available data comprise aggregated, non-identifiable quantitative scoring profiles and the corresponding qualitative textual rationales recorded during institutional evaluations. These datasets are structured to exclude any proprietary organisational configurations or personal insights that might compromise participant confidentiality.

2.2.2 Data availability

Where suitable data are generated and meet consent, confidentiality and data protection requirements, openly accessible outputs will be uploaded to an OpenAIRE-compliant repository (e.g. Zenodo) and tagged as part of the DAISY community project data collection. Data availability will depend on the generation of aggregated, non-identifiable outputs that are appropriate for open sharing.

2.3. Making data interoperable

2.3.1 Data interoperability

Openly accessible data will be structured and documented to support interoperability across systems, platforms and research contexts. Open, commonly used file formats will be employed wherever possible (e.g. plain text, PDF, CSV, standard audio formats), and datasets will be accompanied by clear metadata aligned with recognised standards. The use of consistent metadata fields, controlled vocabularies where appropriate, and stable identifiers, enables data from different case studies to be combined, compared, or interpreted within wider analytical frameworks. Interoperability is further supported by depositing metadata and datasets in an OpenAIRE-compliant repository (Zenodo), ensuring compatibility with European research infrastructures.

2.4. Making data reusable

2.4.1 Data licencing

Where data are made openly accessible, they will be released under clear and appropriate licences that specify conditions for reuse. Licences will be selected to balance openness with ethical, legal, and contractual obligations, particularly for qualitative research involving human participants. Licensing information will be clearly indicated in metadata records to ensure transparency for potential reuse.

2.4.2 Date of data availability

Data suitable for open access sharing will be made available as soon as practicable following completion of data collection, analysis, and necessary quality checks. Where relevant, data release may follow an embargo period – project month 35 – to allow for primary analysis and reporting. The timing of data availability will be documented in metadata and project documentation to ensure clarity for secondary users.

2.4.3 Reuse of data by third parties

Reuse of data by third parties is encouraged where data are openly available and subject to the stated access conditions and licences. Users are expected to acknowledge the DAISY project as the data source and to respect any ethical, legal, or contextual limitations associated with the data. For qualitative materials, reuse is

typically limited to non-identifiable outputs, as raw data may be restricted to protect participant confidentiality.

2.4.4 Reuse time limit

There are no fixed time limits placed on the reuse of openly available DAISY datasets. Data deposited in trusted repositories are intended for long-term preservation and reuse, subject to repository policies and the terms of the applicable licences. Where access restrictions apply, these are defined by ethical approvals, consent agreements, or legal requirements rather than temporal limits.

3. Data security

Data security procedures are implemented by all consortium partners (as applicable) to ensure that all data generated within the DAISY case studies and TRD2 are stored, accessed and managed in a manner that safeguards confidentiality, integrity and availability. Particular attention is given to data arising from the involvement of human participants, in line with ethical approvals, data protection requirements and institutional policies of the respective lead local partner and the overarching consortium-level DMP.

3.1 Secure storage, data recovery and transfer of sensitive data

3.1.1 Types of data to stored

Secure data storage protocols cover all quantitative evaluation matrices, qualitative diagnostic annotations, expert workshop records, and administrative metadata. Sensitive components are strictly bounded to the primary qualitative text entries and workshop notes where institutional vulnerabilities or specific project tensions might be discussed by human participants.

3.1.2 Secure storage of data

All raw and semi-processed research data are maintained on secure, password-protected institutional servers operated by Martin Luther University Halle-Wittenberg and authorised consortium partners. Access privileges are restricted to the core research team through strict credential management, and automated backup routines are executed daily to eliminate the risk of data corruption or loss. In contrast, data voluntarily submitted by users via TRD2 is processed solely to

deliver personalised results to the user and is not retained by DAISY, in accordance with the DAISY Website Privacy Policy (Annex 4).

3.1.3 Transfer of sensitive data

No transfer of sensitive data is envisaged.

4. Ethical aspects

The development, validation, and empirical testing of the TRD2 operate under formal ethical approval granted by the German Association for Experimental Economic Research e.V. under Institutional Review Board Certificate No. FJn7CjjV (issued 28 May 2025; valid until 28 May 2027). All research and evaluative activities involving human participants are executed in strict compliance with the ethical standards of the GfEW, the legal mandates of the European Union – specifically the General Data Protection Regulation (GDPR) – and the institutional research policies of Martin Luther University Halle-Wittenberg (MLU).

Engagement with human participants during the tool's calibration workshops and expert appraisals relies entirely on voluntary participation and explicit, prior informed consent. Before any diagnostic data collection or qualitative assessment begins, contributors receive comprehensive disclosures outlining the systemic purpose of the tool, the precise operational use of their insights, their absolute right to withdraw from the process at any point without consequence, and the specific protocols maintaining data confidentiality. Users of the TRD2 online tool voluntarily provide their details solely to receive their personalised results, in accordance with the DAISY Website Privacy Policy (Annex 4).

To safeguard participant integrity, all qualitative and quantitative inputs tracking institutional dynamics or expert positions undergo rigorous full anonymisation before any cross-case synthesis, report sharing, or open-access publication. Access to raw, identifiable qualitative assets, such as specific interview transcripts or individual assessor notes, remains strictly restricted to authorised members of the core research team. The data footprint is limited to the parameters necessary for validating the tool's diagnostic dimensions, avoiding the collection of any superfluous sensitive personal details. Any subsequent modification to the research protocols or tool testing methodologies requires a formal submission and updated ethics approval from the GfEW prior to deployment.

Annex 3

Consent form and Participant Information Sheet

CONSENT FORM

DAISY Research Project

You are invited to take part in the above research project DAISY (DigitAl, technological and Social innovation mixes enabling transformation for biodiversity and equity) to help advance understanding of how interventions - including such as digital, technological and social innovations; regulations; financial incentives and tools affecting social norms and emotions - and their mixes, can be used to promote equitable, biodiversity-positive change within a range of different personal, practical and institutional contexts.

Before you decide to take part, please read the accompanying Participant Information Sheet.

Researcher(s): [... Insert ...]

Institution/ Department: [... Insert ...]

Contact details: [... Insert ...]

This form is to confirm that you understand what the purposes of the research project are, what will be involved and that you agree to take part. If you are happy to participate, please tick or initial each box to indicate your agreement, sign and date the form, and return it to the researcher.

Please do not hesitate to ask questions if anything is unclear or if you would like more information about any aspect of this research. It is important that you feel able to take the necessary time to decide whether or not you wish to take part.

1	I confirm that I have read and understood the <u>Participant Information Sheet</u> for the above research project and have had the opportunity to ask questions.	
2	I understand that all the information I provide will be held securely and treated confidentially.	
3	I understand my participation is voluntary and that I am free to withdraw my participation without giving a reason, by contacting the lead researcher <u>at any time</u> until the date specified in the Participant Information Sheet.	
4	I understand the results of this research will be used in academic papers and also that other formal research outputs, including anonymised data, may be made available to be re-used via an open access online science data repository.	
5	I am happy for photographs being taken during the activities of the project and for audio/visual recording to be conducted at some of the events and following a prior notification on each occasion.	
6	I am happy for photographs taken, from which I am personally identifiable, being used for research outputs and also for project specific communication materials, subject to my prior approval	
7	As a seed innovation case study core group participant, I am happy for my name to be included in publicly available materials listing group membership	
8	I agree to take part in the above research project.	

_____	_____	_____
Name of Participant	Signature	Date
_____	_____	_____
Name of Researcher	Signature	Date



**Funded by
the European Union**

DAISY receives funding from the European Union's Horizon Europe research and innovation programme under grant agreement no: 101181857

Participant Information Sheet

You are invited to take part in the [DAISY](#) project (DigitAl, technological and Social innovation mixes enabling transformation for biodiversity and equity). Professor Alex Franklin (Centre for Agroecology, Water & resilience (CAWR) is leading this research. Before you decide to take part, it is important you understand why the research is being conducted and what it will involve.

What is the purpose of this research?

The purpose of the research is to understand how interventions (including such as digital, technological and social innovations; regulations; financial incentives and tools affecting social norms and emotions) and their mixes can be used to promote equitable, biodiversity-positive change at personal, practical and institutional levels. Field research in support of this work is centred around five seed innovation case studies within four European countries (UK, Germany, Hungary, the Netherlands).

[Edit as applicable:] The UK case study is centred on the Coventry/ Warwickshire City Nature Challenge. You will be asked about your experience in organising and/or participating in City Nature Challenge activities and events as well as other forms of biodiversity-focused citizen science-based activity, share ideas on their improvements, and provide feedback about your participation in the DAISY project.

Who is organising and funding the research?

The research is organised by Coventry University and funded by the European Commission (Grant agreement 101181857). The research was granted ethics approval through *[Edit as applicable:]* Coventry University's Research Ethics review and approval process (reference: P185462).

Do I have to take part?

No - it is entirely up to you. If you do decide to take part, please keep this Information Sheet and complete the Consent Form to show that you are happy to participate. If you wish to withdraw from the research later please contact the lead



researcher (see below for contact details). You are free to withdraw from the research until your data is analysed/published or until 30th of June 2027. You do not need to provide a reason.

What will happen if I decide to take part?

You will be asked to attend [*insert as applicable (e.g. workshop, research interview)...*]. These activities will take place at [*... insert...*]. It should take around [*... insert...*].

Why have I been invited to take part?

You have been invited to participate in this research because of your involvement in [*Edit as applicable:*] the Coventry/ Warwickshire City Nature Challenge or because the topic may fall into your professional or personal area of interest.

What are the potential benefits and risks in taking part?

By taking part, you will have the opportunity for engaging with others interested in the same subject, potentially influencing the direction of biodiversity policy nationally and internationally, transferring and gaining further knowledge in biodiversity-positive decision-making, environmental sustainability, societal relationships with nature, and interventions which promote biodiversity and social equity. Feedback collected through the research will be analysed with the aim of enhancing the [*Edit as applicable:*] combined societal and biodiversity impact of the City Nature Challenge.

The researcher has considered any risks involved in this project. No risks have been identified for research participants and risks for researchers have been mitigated where necessary. If you would like more information or a discussion, please contact the researcher.

Will my information be handled confidentially?

All information provided by you will be kept securely. If your participation is anonymous, your information will be treated strictly confidentially.

The researcher must handle your data safely and in accordance with the ethical and legal requirements of Coventry University Standards, and Procedures, including our Research Ethics and Integrity Statements and our Research Privacy Notice available on our website at <https://www.coventry.ac.uk/gdpr-and-data-protection/privacy-notices/> and the ethical guidelines outlined in the DAISY project's Grant Agreement and Data Management Plan.

What will happen to the results of the research?

The results may be summarised in published articles, reports and presentations. Quotes or key findings will always be made anonymous in any formal outputs unless we have your prior and explicit written permission to attribute them to you by name. If you are a member of the case study learning community, should you give us permission to do so, we would like to include your name and/or affiliation within publicly available project material listing the membership of the learning community. However, your name will not be linked to your responses unless you explicitly request that we do so.

In line with the project funding body (Horizon Europe) Open Science policy, research data that is suitable for open access will be made available in a GDPR-compliant open-access repository. Any shared data will be anonymised or published with appropriate safeguards unless you have provided explicit written consent for identifiable information to be included.

What will happen next?

If you would like to take part, please contact the researcher. You will be asked to complete a consent form.

Researcher contact details: [... *Insert name/ title/ affiliation...*]

Email: [... *Insert*]

Who do I contact if I have any questions or concerns?

Please contact the researcher, [... *Insert as applicable...*]. If you still have concerns or wish to make a complaint, please contact [*Edit as applicable:*] Coventry



University's Research Ethics and Integrity Manager at ethics.uni@coventry.ac.uk and provide the reference P185462.

Thank you for taking time to read this and for considering participating in this research.



DAISY receives funding from the European Union's Horizon Europe research and innovation programme under grant agreement no: 101181857

Annex 4

DAISY Website Privacy Policy

Privacy Policy

June 18, 2026

Disclaimer

All information in this document only reflects the author's view. The European Commission is not responsible for any use that may be made of the information it contains.

Privacy Policy

Introduction

The Privacy Policy of the DAISY project is a document addressing you as Data Subject, i.e. the owner of your personal data. It explains how your personal data is collected, processed, and protected, including the cookie policy of the project.

The DAISY project is committed to protecting your personal data and respecting your privacy.

1. Type of data and related processing

1.1 Data voluntarily provided by the Subscriber

Providing personal data voluntarily is essential to access certain services offered via the website (e.g. newsletter subscription or TRD2 tool application) and to receive requested updates. This includes personal and contact details as well as any other data required to respond to enquiries or deliver services. The DAISY consortium does not collect or process sensitive data.

During normal operations, the system may store certain browsing data. While not collected to identify individuals, such data (e.g. IP addresses, domain names) may allow indirect identification when processed together with other data held by the



Data Controller. These are collected anonymously for statistical purposes but could be used to investigate unlawful activities or damage to the website.

2. Purpose of data collection and processing

Personal data is collected to support the communication and dissemination activities of the DAISY project:

- To provide information and responses related to project activities, research results, and associated content.
- To compile anonymous statistics and reports (e.g. material downloads, website traffic, most visited pages, session duration, user country of origin, etc.)

Subscribers may opt out at any time. All communications include an opt-out link.

3. Data Controller

GreenFormation Kft., a DAISY beneficiary partner and lead for communication and dissemination, is the Data Controller responsible for the data collected and processed via the **DAISY** website.

GreenFormation Kft.'s management is responsible for establishing procedures to protect your data. Appointed staff members handle data processing. Other consortium partners may act as Data Processors and will comply with the terms of this notice.

Data Processing Location

Data processing for website services takes place at the registered office of **GreenFormation Kft.** 1121, Budapest, Remete út 10/C., Hungary.

4. Cookie Policy

Our website uses cookies to enhance your experience.

Types of cookies used on the DAISY website:

- 🚩 **Session cookies** – active only during your visit, deleted upon browser closure.
- 🚩 **Persistent cookies** – remain stored for a defined time, e.g. to remember how a user arrived at the website.

- ☛ **Secure cookies** – used only via HTTPS to ensure encrypted data transmission.
- ☛ **First-party cookies** – set by the same domain as the one shown in the browser's address bar.
- ☛ **Third-party cookies** – set by domains other than the one shown (e.g. embedded content from YouTube or Google Maps). Modern browsers offer options to block such cookies.

5. Legal Basis for Processing Personal Data

Data is processed under the legitimate interest basis (Art. 6(f) GDPR 2016/679). A Legitimate Interest Assessment (LIA) justifies this processing and is reviewed periodically. Communications are intended to benefit both the sender and recipient by facilitating dialogue and growth.

Personal data (**name and email address**) submitted via the website is processed on the basis of the **data subject's consent** (Art. 6(a) GDPR 2016/679). By ticking the consent checkbox on the form, the submitter explicitly agrees to their data being used to receive information from the DAISY project. Consent may be withdrawn at any time by contacting the Data Controller.

6. Duration of Data Processing

Your data will be processed for the period required to maintain the project website and its results, or until you withdraw consent.

7. Data Transfer

No external third-party transfers are made, except to public auditing authorities if required. Personal data may be disclosed to:

- ☛ Members of the DAISY consortium;
- ☛ Persons managing the website or related activities;
- ☛ Service providers managing IT infrastructure;
- ☛ Entities performing monitoring, evaluation, or certification of the project.

Personal data will not be sold or shared with third parties.



8. Rights of the Data Subject

Under the GDPR, you have the right to access, rectify, erase, or restrict the processing of your personal data. You may also object to processing or request data portability.

For details, see the [General Data Protection Regulation \(2016\)](#).

You can withdraw your consent at any time by contacting the Data Controller. This does not affect the legality of processing prior to withdrawal.

To exercise your rights, contact the Data Controller at:

Contact: info@greenformation.net

Response time: Maximum 30 days

9. Changes to This Privacy Notice

We may update this Privacy Policy to reflect changes in our services or feedback from users. In case of significant changes to data use or processing, we will notify users via the website or direct communication prior to implementation.

10. Further information

Should you require more information on data management, storage and protection, please also see GreenFormation Kft. data protection policy [here](#). Please also feel free to read further in DAISY's [Data Management Protocol](#) about how the project manages data.