

The role of SOcial ecoNomY in Addressing social exclusion, providing quality jobs and greater sustainability (SONYA)

D6.2. Data Management Plan

Document information			
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WP	WP6	Related task	TASK 6.1.
Status	DRAFT		
Date of publication	APRIL 2025		

PROJECT CO-FUNDED BY EUROPEAN COMMISSION WITHIN THE SEVENTH DISSEMINATION LEVEL		
PU	Public	☒
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RE	Restricted to a group specified by the consortium (including the Commission Services)	☐
CO	Confidential, only for members of the consortium (including the Commission Services)	☐

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Funded by the European Union under Grant Agreement N°. 101177171.
Views and opinions expressed are however those of the author(s) only and do not necessarily reflect those of the European Union.

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1. Introduction and scope

SONYA is a project funded by the European Union under the programme Horizon Europe in the topic HORIZON-CL2-2024-TRANSFORMATIONS-01-09.

The project starts 01/11/2024 with a project duration of 48 months.

The mission of SONYA is to evaluate the role of social economy organisations in attracting, retaining and supporting care workers. Its expected outcomes are to deliver innovative participatory models of social care, assessment methods and policy guidelines adapted to SEs with varying sizes, network development levels and national contexts.

1.1 Specific objectives of the project

(O1) TO EMPOWER THE SOCIAL ECONOMY ORGANIZATIONS IN DEVELOPING MULTI-ACTOR SOCIAL AND ENVIRONMENTAL COMMUNITY INITIATIVES BY INCREASING THEIR ORGANIZATIONAL CAPACITIES.

SONYA will analyse current initiatives and trends across the EU (**WP1**, RO1.1) to increase the organizational capacities of multi-actor networks. Training and support services (community building activities, adoption of ICT tools and/or financial and funding allocation mentoring services; **WP2**, KH2.1) will be provided to more than 60 social economy organizations (cooperatives, foundations, and cultural centres) contacted through the partner's network to develop community initiatives (**WP3**, KH3.1) that integrate the needs of the pool of workers already engaged on a voluntary or contract basis within SEs to support both, the needs of the elderly population and the needs of informal care workers such as family members.

(O2) TO IDENTIFY, ASSESS AND TRANSFER BEST INNOVATIVE PRACTICES FOSTERING INCLUSIVE EMPLOYMENT AND BETTER WORKING CONDITIONS IN RURAL AREAS TO SOCIAL CARE SERVICES FOR OLDER ADULTSⁱ.

SONYA will analyse SEs organization barriers and best implemented innovative practices (**WP1**, RO1.2) fostering inclusive employment and better conditions across the European social entrepreneurship ecosystem in terms of participatory community-based models, the use of communication technology, logistics, and organisational and operational efficiency, together with the community's needs. Best innovation practices will be adapted and tested in the 3 SEs models (**WP3**, DEM3.1; Living-labs in Italy, Bulgaria, and Spain) and transferred to the EU's social care sector for older adults (France, Germany, Poland, Sweden, Romania, Greece) and Australia.

(O3) TO MEASURE THE IMPACT OF SOCIAL CARE SERVICES FOR OLDER ADULTS AND SOCIAL ECONOMY ORGANIZATIONS OPERATING IN RURAL AREAS WITH SCIENTIFIC PRECISION USING SOCIAL INCLUSION, SUSTAINABILITY, AND SERVICE QUALITY, EFFECTIVENESS, AND EFFICIENCY INDICATORS.

SONYA seeks to support legal, policy and organizational recommendations with a robust assessment model (**WP4**, RO4.3), tools (**WP3**, KH3.1) and set of measurable impact indicators (**WP4**, RO4.2) tested with data from social innovation ecosystems of up to 320.000 members (**WP3**, DEM3.1). The assessment model focuses on the contribution of SEs to counteract social exclusion of people at risk, sustainability and quality of the services provided, quality of life for both care givers and elders and effectiveness and efficiency of care in comparison to other provider's services offer. SONYA will provide standards for evaluation of the contribution of local social and environmental community actions to address social elderly needs and inclusive employment in the local communities of interest.

(O4) TO IMPROVE THE LEGAL AND POLICY FRAMEWORKS SUPPORTING SOCIAL ECONOMY ORGANIZATIONS CAPACITY TO ACTIVELY PARTICIPATE IN PUBLIC AND PRIVATE NETWORKS FOR SOCIAL CARE FOR OLDER ADULTS.

SONYA seeks to provide legal and policy recommendations (**WP5**, SR5.1) for 3 social economy organizational models (Italy, Bulgaria, and Spain) representing different rural community sizes, network development degrees and operational contexts across the EU. Discussion forums will be established (**WP5**, KH5.1) to foster transferability in other regions. Initial analysis will be triggered with France, Germany, Poland, Sweden, Romania, and Greece, thanks to the collaboration with CARE4CARE (FIR) and SHARE (IPS-BAS) projects and will include Australia's perspective who's rural and policy development context is aligned with the EU trends.

1.2 Scope of the deliverable

This deliverable presents a first approach about how the data will be managed, described, processes and cured during project duration and after completion.

2. Data summary

Below is the initial inventory of the data generated in each work package and the explanation about how it will be managed:

2.1 WP1 Data – Analysis of the social economy in the social care sector for older adults

Objectives:

To perform a comprehensive analysis of the context from literature and specific data from multi-actor network of care (WP2) to identify challenges and differences in the rural social care sector for older adults across Europe:

- Relevant EU policies and labour, retirement, and quality of service guidelines for the provision of social care for older adults by social economy organizations in rural areas. Special attention will be given to policies supporting social economy organizations in the provision of participatory social elderly care and support for family carers.
- Current EU policies, legal provisions, and implementation challenges for ensuring decent work, worker protection and effective representation of informal family care workers and workers from disadvantaged groups (elderly women, migrants, people with disabilities) with special attention to employment in social economy organizations compared to other public or private providers.
- Available resources for the development of local social and environmental community actions and their potential contribution to address social elderly needs and inclusive employment in the local communities of interest.

Leader: IPS-BAS; **Participants:** REN, UJI, FIR, DU, FO, FTC, ASA

Types and formats of data:

- **Task 1.1. Classification of EU countries in terms of their development of the social economy in the social care sector for older adults:** all files included to develop legal and policy framework like classification based on regional and national social economy context data, demographic challenges and social exclusion risks. **Format:** secondary data, quantitative and qualitative data, glossary of terms on spreadsheets (XLSX); analytical report in the form of text documents (DOCX, PDF).
- **Task 1.2. Legal and policy framework analysis for the provision of social care for older adults:** summary of EU policies, labour laws, social exclusion guidelines, retirement and quality of service guidelines. **Format:** policy analysis reporting the form of text documents (DOCX, PDF).
- **Task 1.3. Organizational resources assessment to detect organizational barriers and enablers in SEs:** it includes all files to develop methodological guidelines like analysis of organizational practices, governance structures, labour logistics, recruitment processes, performance management, communication competencies, inclusive leadership, multi-stakeholder team management from Italy, Spain and Bulgaria. **Format:** interview transcripts, analysis and literature reviews in text documents (DOCX, PDF); survey results (XLSX, CSV).

Purpose of the data generated/collected:

- Perform a comprehensive analysis of the social economy and the social care sector for older adults.

- Grouping of countries according to level of SE development.
- Comparative analyses of social economy and social economy organisations, identification of challenges and differences in rural social care for older adults.
- Synthesize relevant EU policies and guidelines for social care provision to older adults.
- Assess organisational resources and best practices to achieve decent work in a participatory multi-actor network of care.
- Develop methodologies to evaluate organizational resources in social economy organizations.

Origin of the data:

- Data in Task 1.1 will be collected from the scientific literature, relevant and updated official documents such as reports, action plans, previous project analyses, and survey data such as SHARE, EUROSTAT across EU Member States and Australia.
- Data in Task 1.2 will originate from EU policy documents, legislation, social exclusion guidelines, and retirement and quality of service guidelines.
- Data in Task 1.3 will be derived from literature reviews, interviews, surveys, and best practice analyses at both EU and international levels.

Who will reuse the data and how?

- Data will be shared with project partners of WP1, WP2, WP4 precisely in Task 2.1 where data of interviews will be integrated in deliverable D1.3 (Task 1.3).
- All research publications and results will be uploaded and made accessible in ORE and Zenodo to increase long-term dissemination and impact of SONYA's outcomes.

To whom might it be useful ("data utility")?

SONYA will facilitate accessibility of its results to stakeholders by publishing major outcomes in open access repositories and journals. This data will support comprehensive understanding of EU policies and regulations and available resources in the network of care workers, as well as the disparities within the sector, which will have a direct impact in decision-making, leading to more sustainable and impactful actions. Local communities and stakeholders, especially those from vulnerable regions and backgrounds, can also benefit from having their needs and major burdens considered. Reports analysing data on the legal and policy challenges to the provision of social care of older adults will be used to policymakers of long-term care and social economy action plans.

2.2 WP2 Data – Participatory multi-actor network care

Objectives:

To create a long-lasting multi-actor network within and across different countries and social economy development stages by engaging social economy organizations with expertise in social, environmental, or cultural projects within a community:

- To identify stakeholders and map their interests, social, economic and cultural capitals. To evaluate their motivation and potential to added value to a multi-actor community network, which will share common goals to contribute to social care for older adults and inclusive care work.

- To identify context-specific scenario gaps in organisational and training needs such as expertise, human, financial, technological, logistical and facilitate access to these via building relationships with other community actors and training to support Task 1.3.
- To establish a process and procedures for continuous improvement and learning to effectively integrate the interests and well-being of elderly participants, carers, and social economy organizations volunteers and workers.

Leader: REN; **Participants:** UJI, FIR, IPS-BAS, FO, FTC, ASA, DU

Types and formats of data:

- **Task 2.1. Preparatory action for social economy actors' engagement:** preparatory files of focus groups containing stakeholder information (professional profile, interests and needs), social network analysis data, qualitative interview transcripts and technical workshop results. **Format:** analysis and transcripts in text documents (DOCX, PDF), stakeholder data and workshop results in spreadsheets (XLSX, CSV); presentations of organisations involved in the care sector including information on their mission and operations (PPTX).
- **Task 2.2. Practical tools elaboration for organizational resources enhancement:** include best practice guidelines, reports from training modules, service designs and community building action plans, as well as feedback from workshops and questionnaires. **Format:** guidelines, surveys and reports in text documents (DOCX, PDF), multimedia files such as videos (MP4), presentations (PPTX, PDF).
- **Task 2.3. Development of the participatory multi-stakeholder model for care in rural communities:** including identification of stakeholder motivation incentives, drafts of governance structures and care model, cross-country analysis results and needs and interests' assessments. **Format:** reports, analysis and models in text documents (DOCX, PDF), spreadsheets to gather model data (XLSX, CSV).

All the personal data voluntarily provided and collected during workshops and/or via email or online questionnaires will be integrated and pseudo anonymized before transferring it or fully anonymised if personal data is not relevant. Personal data will be kept in Europe only.

Purpose of the data generated/collected:

- Engage social economy actors and create a multi-actor network.
- Develop practical tools to enhance organizational resources in social economy organizations.
- Establish and refine a participatory multi-stakeholder model for social care for older adults in rural communities.
- Facilitate continuous improvement and learning processes within the network.

Origin of the data:

- Data generated in Task 2.1 will be collected from focus groups, social network analyses, qualitative interviews, and technical workshops.
- Data generated in Task 2.2 will originate from the development and testing of training modules, service designs, and community building actions.
- Data generated in Task 2.3 will be derived from needs assessments, governance structure analyses, and cross-country evaluations.

Who will reuse the data and how?

- Data will be shared with project partners from WP1 and WP4 to carry out research activities in WP2.

- Publications can be shared upon an email request by other researchers to the authors.
- All research publications and results will be uploaded and made accessible in ORE and Zenodo to increase long-term dissemination and impact of SONYA's outcomes.

To whom might it be useful ("data utility")?

SONYA will facilitate accessibility of its results to stakeholders by publishing major outcomes in open access repositories and journals. This multi-actor network can work as a baseline for future research activities in the social economy and social care sector for older adults, as it identifies all segments of society involved and scenarios, process and procedures to carry out a participatory model. This also has an impactful effect on policymaking, leading towards more realistic and effective actions.

2.3 WP3 Data – Context-specific best innovative practices

Objectives:

To assess the sustainability of the best innovative practices (network, operational (such as logistics), technological (such as ICT tools) and organisational, including training) identified in WP1 and WP2 considering the local context of the social economy organizations participating in Italy, Spain, and Bulgaria.

- To develop preparatory actions with local stakeholders before best practices implementation
- To test through the Living Lab pilots context-specific best innovative practices and database creation with ASA's information on key contacts and capacities of SEOs.
- To ensure short term sustainability, including alignment with available financial resources from public and private funds.
- To assess the long-term sustainability and associated risks (organisational, environmental, social, financial, and operational) in the transition process to decent work approach in the provision of remote care services to the elderly and the transferability of best practices.

Leader: REN; **Participants:** UJI, FIR, IPS-BAS, FO, FTC, ASA, DU

Types and formats of data:

- **Task 3.1. Deployment of context-specific best practices in pilots:** all files necessary during the implementation of Living labs, including implementation and monitoring plans of pilots, database with stakeholder information, financial resource data, training materials and Knowledge Transference Packs (KTPs). **Formats:** plans, KTPs and reports in the form text documents (DOCX, PDF, PPTX), databases (XLSX, CSV).
- **Task 3.2. Impact measurement and sustainability risks analysis:** files included during the validation of D4.3 (WP4) such as analysis of Key Performance Indicators (KPIs), risk assessment data, evaluation of mitigation measures. **Formats:** reports in the form of text documents and summaries of documents (DOCX, PDF; PPTX), spreadsheets gathering data (XLSX, CSV).
- **Task 3.3. Transferability analysis:** results from learning labs including feedback from stakeholders, transferability analysis reports, discussion forum results. **Formats:** text documents and presentation of key points (DOCX, PDF, PPTX), spreadsheets (XLSX, CSV).

All the personal data voluntarily provided and collected will be integrated and pseudo anonymized before transferring it or fully anonymised if personal data is not relevant. Personal data will be kept in Europe only.

Purpose of the data generated/collected:

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- Implement and test best innovative practices in living labs.
- Measure the impact and assess the sustainability of these practices.
- Identify and mitigate risks associated with the implementation of best practices.
- Analyse the transferability of best practices to similar contexts in other regions and countries.

Origin of the data:

- Data generated in Task 3.1 will be collected from living labs, stakeholder engagements, training sessions, and financial resource assessments.
- Data generated in Task 3.2 will originate from the implementation of best practices, KPI measurements, and risk assessments conducted during the living lab campaigns.
- Data generated in Task 3.3 will be derived from stakeholder feedback, discussion forums, and transferability analyses.

Who will reuse the data and how?

- Data will be shared with project partners of WP1 and WP2, as WP3 utilizes results from these two to carry out its tasks.
- Publications can be shared upon an email request by other researchers to the authors.
- All research publications and results, including KTPs, will be uploaded and made accessible in ORE and Zenodo to increase long-term dissemination and impact of SONYA's outcomes.
- Database created with ASA's information on key contacts and capacities of SEOs will be used by other SEOs and actors involved in the care sector to identify potential partners or relevant services available.

To whom might it be useful ("data utility")?

SONYA will facilitate accessibility of its results to stakeholders by publishing major outcomes in open access repositories and journals. Results obtained from Living Labs bring valuable data of the implementation of innovative practices, which include outlining major needs and burdens as well as assessing impact and sustainability of these practices. This is essential to develop new policies that deliver impactful results.

2.4 WP4 Data – Impact measurement enablers

Objectives:

To develop a robust and holistic assessment framework, tools and set of measurable impacts for evaluating the contribution of social economy organizations, in comparison to other provider's services offer, in addressing social elderly needs and inclusive employment in rural areas with the objective of reaching specific sustainability and inclusion targets.

- To identify relevant principles and methods for impact assessment with scientific precision as means to meet active aging objectives and create more sustainable and inclusive employment.
- To identify a KPIs baseline and future desirable more sustainable scenarios considering decent work standards in the logistics of labour to deliver remote social care for older adults.
- To assess the sustainability of the best practices tested, including a measurement of the quality of life for both care givers and elders, the quality of the service provided, and the effectiveness and efficiency of care services provided by social economy organizations.

Leader: UJI; **Participants:** REN, FIR, IPS-BAS, FO, FTC, ASA + JRC

Types and formats of data:

Types of data will consist of literature review and analysis, results from technical workshops and focus groups, indicators, tools and databases and data on innovation actions gathered during the implementation of the following WP4 Tasks:

- **Task 4.1. Science-based selection of specific variables and KPIs for assessment models:** selection of variables, databases and KPIs and tools to develop impact assessment model. **Format:** Quantitative data in spreadsheets (XLSX, CSV), qualitative data in text documents (DOCX, PDF).
- **Task 4.2. Codesign of multicriteria decision-making methods for social economy actions assessment:** files and data necessary to develop multicriteria decision-making methodology, which includes analysis of methodologies, model iterations, stakeholder data and feedback. **Format:** Methodological frameworks and analysis in text documents (DOCX, PDF), stakeholder feedback and survey results (XLSX, CSV).
- **Task 4.3. Holistic Sustainability Impacts Assessment Framework development:** all files and data necessary to develop framework, including impact assessment and evaluation results. **Format:** Framework and impact evaluation report in text documents (DOCX, PDF), evaluation results in spreadsheets (XLSX, CSV).

All the personal data voluntarily provided and collected will be integrated and pseudo anonymized before transferring it or fully anonymised if personal data is not relevant. Personal data will be kept in Europe only.

Purpose of the data generated/collected:

- Develop and refine assessment frameworks for evaluating the sustainability and effectiveness of social economy organizations.
- Inform decision-making processes by providing robust, scientifically based variables and KPIs.
- Evaluate the impact of social economy actions on sustainability.

Origin of the data:

- Data will be collected from scientific literature (Cordis, Scopus, WoS, Google Scholar) existing databases (ECOINVENT, SHDB, PSILCA), and stakeholder inputs.
- Data will originate from co-design process with local stakeholders, including feedback from carers and older people.

Who will reuse the data and how?

- Data will be used by project partners for ongoing research in WP5, precisely to be shared in Task 5.1.
- Publications can be share upon an email request by other researchers to the authors.
- All research publications and results will be uploaded and made accessible in ORE and Zenodo.

To whom might it be useful ("data utility")?

SONYA will facilitate accessibility of its results to stakeholders by publishing major outcomes in open access repositories and journals. By making the data open access, the project ensures widespread dissemination and utilization, maximizing its impact and reach. This data will support future research activities, as it delivers a robust framework including indicators and process to effectively measure real impact of actions carried out by social economy organizations. In the overall picture, it benefits policy decisions, enhance care practices, and promote inclusive employment and will be useful to older people, care workers, social enterprises, entrepreneurs, investors, and research organizations.

2.5 WP5 Data – Co-creation approach for policy and legal recommendations

Objectives:

To distil all the information from previous work packages research, translating complex content into a language accessible to policymakers:

- To formulate actionable recommendations based on this translated knowledge and initiate implementation with local policy makers.
- To conduct a thorough evaluation of the policy effects within a short timeframe.
- To integrate a consultation phase with national and European policymakers for both the initial draft and the final version, incorporating insights from small-scale policy experiments.

Leader: FIR; **Participants:** REN, UJI, FIR, IPS-BAS, FO, FTC, ASA, DU + JRC

Types and formats of data:

- **Task 5.1. Open discussion forums for facilitating new policy decisions:** qualitative data (interview transcripts, discussion notes, feedback forms), quantitative data (survey results) and communication materials (pictures, presentations) gathered from learning labs. **Formats:** text documents (DOCX, PDF), presentations (PPTX, PDF), spreadsheets (XLSX), pictures (JPEG, PNG).
- **Task 5.2. Policy brief and white book for social economy organizations:** qualitative data (draft documents, feedback summaries) and quantitative data (evaluation metrics), as well as communication materials for the presentation at final event. **Formats:** text documents (DOCX, PDF), spreadsheets (XLSX), presentations (PPTX, PDF).

All the personal data voluntarily provided and collected will be integrated and pseudo anonymized before transferring it or fully anonymised if personal data is not relevant. Personal data will be kept in Europe only.

Purpose of the data generated/collected:

- To capture insights and feedback from policymakers and stakeholders during open discussion forums, which will inform the formulation of policy recommendations.
- To develop and refine policy briefs and the white book, incorporating feedback from consultations and evaluations to ensure the recommendations are robust and actionable.

Origin of the data:

- Data generated in Task 5.1 will be generated from stakeholder interactions during online platforms and physical events, including contributions from experts and policymakers.
- Data generated in Task 5.2 will be derived from draft documents, feedback obtained during open discussion forums, and evaluations conducted by FIR.

Who will reuse the data and how?

- Data will be shared with project partners of WP1 and WP2, as WP5 utilizes results from these two to carry out its tasks.
- Publications can be share upon an email request by other researchers to the authors.
- All research publications and results will be uploaded and made accessible in ORE and Zenodo to increase long-term dissemination and impact of SONYA's outcomes.

To whom might it be useful ("data utility")?

Actions carried out in this WP has a direct impact on policymaking, as it gathers all project results to develop actionable policy and legal recommendations. It will guide towards more informed and realistic regulations that have an effective impact on social economy and elderly care.

2.6 WP6 Data – Impact maximization

Objectives:

To maximise the project outcomes and its transformation into wider impacts by: emphasising innovation and novelty in SONYA's approach highlighting how the results contribute to advancing the state of the art; encouraging interdisciplinary collaboration bringing together expertise from different social economy related fields involving academia, industry, other relevant stakeholders and other projects already addressing challenges for the social care sector for older adults; developing a robust plan for disseminating the results and outline strategies for exploiting the outcomes; ensuring compliance with ethical standards and regulations, and clearly communicate how ethical issues will be managed; and following-up the evolution of the KPIs used to measure the success and impact of the tasks.

Leader: ZAB; **Participants:** ALL + JRC

Types and formats of data:

Types of data will consist of research data, survey results, interview transcripts, workshop materials, communication materials, project reports, policy recommendations, anonymized participant data, gathered during the implementation of WP6 Tasks:

- **Task 6.1. Data Management Plan elaboration and update. Monitoring of Ethics:** files outlining guidelines and procedures for inventory of data, ethical compliance documentation and anonymized participant data. **Formats:** Text documents (DOCX, PDF), spreadsheets (XLSX), databases (CSV).
- **Task 6.2. Exploitation plan deployment:** files containing detailed description of Exploitation plans, Key Exploitable Results (KER) descriptions, dissemination materials, datasets and reports gathering unexploited results on the Open Research Platform. **Formats:** Text documents (DOCX, PDF), presentations (PPTX), datasheets (XLSX).
- **Task 6.3. Design and implementation of communication actions:** files compiling all information from events and feedback from stakeholders, as well as documenting and monitoring the distribution and impact of communication materials and social media analytics. **Formats:** Text documents (DOCX, PDF), images (JPEG, PNG), videos (MP4), web analytics data (CSV).
- **Task 6.4. Clustering activities and Policy Roundtable events:** files containing description of workshop materials and minutes, policy recommendations, networking activity reports. **Formats:** Text documents (DOCX, PDF), presentations (PPTX), meeting minutes (DOCX, PDF).

All the personal data voluntarily provided and collected will be integrated and pseudo anonymized before transferring it or fully anonymised if personal data is not relevant.

Purpose of the data generated/collected:

- **Maximize project outcomes:** to ensure that the project's results are effectively transformed into wider impacts by emphasizing innovation and novelty in SONYA's approach.
- **Develop Dissemination and Exploitation strategies:** to create a robust plan for disseminating the results and outline strategies for exploiting the outcomes, ensuring that the project's findings reach the intended audiences and have a lasting impact.

- **Ensure ethical compliance:** to ensure compliance with ethical standards and regulations and clearly communicate how ethical issues will be managed throughout the project.
- **Monitor and evaluate impact:** to follow up on the evolution of the KPIs used to measure the success and impact of the tasks, ensuring that the project meets its objectives and delivers meaningful results.

Origin of the data:

- Data collected from project activities such as surveys, workshops, and events, and contributions from project partners and participants during the implementation of DEC activities.
- Data generated by each partner for impact monitoring and assessment of project's results.
- External data sources such as existing research, public databases, and collaborations with other projects during networking actions to support project's promotion and visibility through SONYA's main communication channels.

Who will reuse the data and how?

- SONYA will prioritize open access repositories and journals to maximise impact. Datasets will be available in Zenodo to expand the methods impact among academia stakeholders and 2 JRC publications about participatory model of care and impacts assessment applied to social care for older adult policies.
- Publications can be shared upon an email request by other researchers to the authors.
- The publication datasets will be shared to the JRC without embargo and uploaded to open repository at the end of the project to facilitate data transfer.

To whom might it be useful ("data utility")?

Results and knowledge generated in SONYA will be useful to worldwide scientific communities as well as care workers, social enterprises, trade unions and policymakers. SONYA website and social media channels will give visibility to its open access publications, databases and events to enhance the results impact. Unexploited results will be shared on the Open Research Europe platform to ask for support from the Horizon Booster service.

2.7 WP7 Data – Project management

Objectives:

- To provide overall scientific direction and to drive the progress of the project, steering efforts of the partners for the achievement of milestones, outcomes, and impacts.
- To provide a unified scientific, technological, and strategic view throughout the project implementation.
- To continuously assess the degree of fulfilment of the project's objectives.
- To ensure that the project is appropriately managed according to the work plan.

Leader: REN; **Participants:** ALL

Types and formats of data:

- **Task 7.1. Internal procedures and management structure:** files containing management procedures, meeting minutes, templates for deliverables and reports, conflict resolution and documentation, Data Management Plan, official reports (interim and final).

Formats: reports, minutes and plain text documents (DOCX, PDF), email (EML).

- **Task 7.2. Implementation of project management:** files containing liaison and communication records with the European Commission, work plan updates and schedules, meeting agendas and minutes, financial reports and cost

statements, periodic reports, risk identification and management documentation, corrective and action plans, training and guidance materials on financial/legal aspects and how to use the collaboration tools and shared folders, project management milestone documents.

Formats: reports, minutes and guidelines in text documents (DOCX, PDF), email (EML), spreadsheets (XLSX), presentations (PPTX), databases (CSV).

All the personal data voluntarily provided and collected will be integrated and pseudo anonymized before transferring it or fully anonymised if personal data is not relevant. Personal data will be kept in Europe only.

Purpose of the data generated/collected:

- To provide overall scientific direction and drive the progress of the project.
- To ensure unified scientific, technological, and strategic views throughout the project implementation.
- To continuously assess the degree of fulfilment of the project's objectives.
- To manage the project according to the work plan, including legal, contractual, and administrative aspects.
- To support decision-making, conflict resolution, and consensus building within the consortium.

Origin of the data:

SONYA consortium. The data will be internally shared among partners participating in SONYA using the specific Teams channel for those involved in WP7. The data will consist of:

- Data generated by the project coordinator (REN) and the innovation and communication manager (ZAB).
- Contributions from all project partners and participants.
- Data collected from internal meetings, workshops, and communication within the consortium.
- Financial and administrative data provided by project partners.

Who will reuse the data and how?

Nobody

To whom might it be useful ("data utility")?

The Consortium and the European Commission

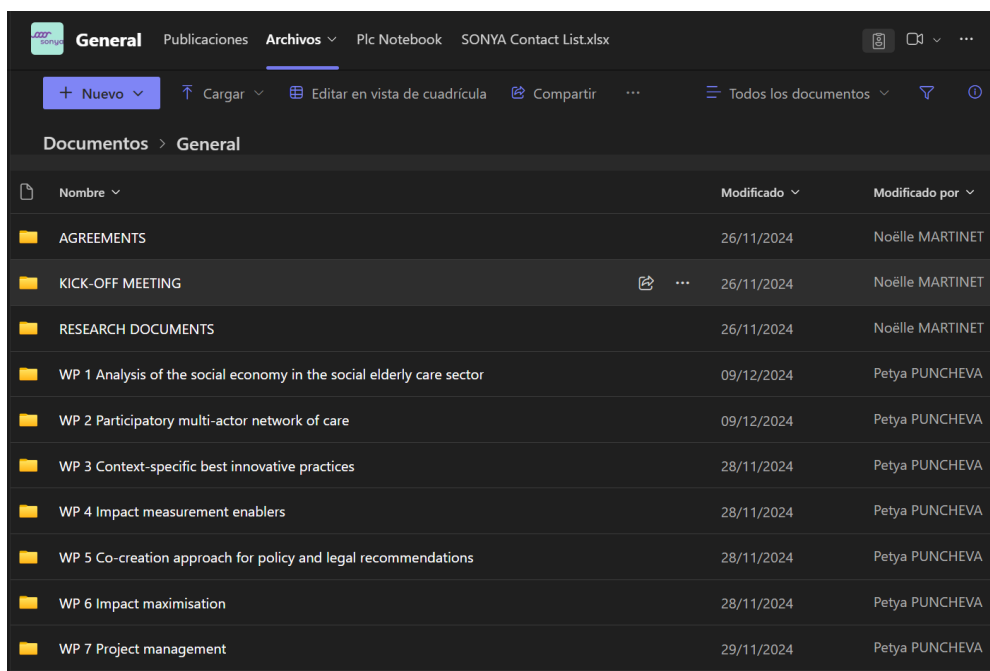
3. FAIR Principles

3.1 Making data findable

Outline the discoverability of data (metadata provision)

All data produced within the project will be stored in English language and common formats to ease the interoperability. All produced data will be shared among researchers from the same WP, as well as task leaders, through a private Teams channel site. Access will also be granted to other personnel linked to the consortium such as postdocs and technicians who may need to use or reuse the data generated.

A specific shared folder for each partner will be created on Teams with shared access between ASA and REN, El Olmo and REN, FTC and REN. The purpose of these folders will be to enable the aforementioned partners involved in the data collection to upload their files on Teams and for REN to anonymize it and transcribe the audiofiles.



Nombre	Modificado	Modificado por
AGREEMENTS	26/11/2024	Noëlle MARTINET
KICK-OFF MEETING	26/11/2024	Noëlle MARTINET
RESEARCH DOCUMENTS	26/11/2024	Noëlle MARTINET
WP 1 Analysis of the social economy in the social elderly care sector	09/12/2024	Petya PUNCHEVA
WP 2 Participatory multi-actor network of care	09/12/2024	Petya PUNCHEVA
WP 3 Context-specific best innovative practices	28/11/2024	Petya PUNCHEVA
WP 4 Impact measurement enablers	28/11/2024	Petya PUNCHEVA
WP 5 Co-creation approach for policy and legal recommendations	28/11/2024	Petya PUNCHEVA
WP 6 Impact maximisation	28/11/2024	Petya PUNCHEVA
WP 7 Project management	29/11/2024	Petya PUNCHEVA

FIGURE 1. SONYA TEAMS CHANNEL SITE

Outline the identifiability of data and refer to standard identification mechanism

All data produced and tasks related to SONYA will be written down in documents and will undergo supervision by the corresponding task leaders through periodic reports. Periodic reports will be prepared on informatic support (ppt, word, pdf, etc) to inform the remaining member of the WP. Task leader will report WP leaders of the activities performed within the WP when appropriate depending on the expected time and project scheduling.

Outline naming conventions and acronyms used

All open data available will use the SONYA acronym as main tag.

SONYA specific tags: #SONYA; #SonyaProject, #social economy; #older adults; # care older adults

Outline the approach towards search keyword

Social elderly care, Social care older adults, Rural areas, Participatory network models, Sustainability and impact assessment frameworks.

Outline the approach for clear versioning

Datasets will be edited by the leaders of each WP and the coordinator will revise them. They will be versioned considering this versioning strategy: <major> <minor>

- Major — increasing the major version we will declare that the complete dataset was updated for publishing it at the end of a reporting period (RP)
- Minor — version increment implies adding new functionality for continuous improvement each RP.

3.2 Making data openly accessible

Specify which data will be made openly available? If some data is kept closed provide rationale for doing so

The consortium will provide summaries of the data in scientific reports and presentations to different audiences.

The consortium will provide anonymized transcripts openly unless there is a risk of identification of the organisations whose representatives participated in the study as informants. This risk could come from the fact that there is an open description of the participant organisations in the SONYA project and that there is only one entity that provides a particular type of service in the selected regions. Even when the consortium removes all the names of places and references to entities, the accounts given by the respondents may lead to identification of the organisation from the

experiences of the local context described, e.g. financial difficulties, experiences with available local infrastructure and systems of care.

Specify how the data will be made available

Scientific publications and congress conferences.

Anonymised transcripts will be provided unless the identity of the participant or the organisation they work for can be identified from the local context described in the interviews and focus groups.

Specify what methods or software tools are needed to access the data? Is documentation about the software needed to access the data included? Is it possible to include the relevant software (e.g. in open-source code)?

Software tools to access the data are free.

Specify where the data and associated metadata, documentation and code are deposited

The research data will be firstly available only for internal purposes in each WP using the internal repository.

Research publications will be uploaded and made accessible in [ORE](#) and data sets in [Zenodo](#), after exploiting the data with publications or patents, when approved by the Executive Board.

Specify how access will be provided in case there are any restrictions

Described above.

3.3 Making data interoperable

Assess the interoperability of your data. Specify what data and metadata vocabularies, standards or methodologies you will follow to facilitate interoperability.

A glossary with the key terminology has been created and internally agreed.

Specify whether you will be using standard vocabulary for all data types present in your data set, to allow inter-disciplinary interoperability? If not, will you provide mapping to more commonly used ontologies?

Standard vocabulary in all cases. The scientific vocabulary will have been previously validated by the reviewers of the scientific publications published.

3.4 Increase data re-use

Describe data quality assurance processes

Executive Board and Work package leaders will review the internal repositories annually to determine potential synergies with sister projects.

Specify the length of time for which the data will remain re-usable

Data collected under SONYA will be made available for re-use upon completion of the experiments. As pointed out above, for reasons of competitive advantages a data embargo may apply, including the completion of scientific publications, patent drafts, PhD thesis completions, for which an embargo of three years (maximum) will be upheld after finalization of the project.

Data produced and made openly available under SONYA will be available for third parties, subject to previous discussion and agreement by all partners involved in the generation of those data and the Executive Board to avoid possible conflicts of interests. Restriction on use of data, software and code are documented in the grant agreement and may vary according to institutional and national policies and legislations. In case of restrictions on use, metadata will be still freely provided, which previous permission of the data owner. The request will then be up for consideration of the data owner and depending on the data owner's decisions full access to the data may be granted. There is the intention to keep the data available indefinitely but additional costs for keeping the web links alive might be applicable.

4. Allocation of resources

4.1 Estimation of costs

The SONYA internal repository will be hosted at Teams channel. Costs for establishing and maintaining the data repository are covered by the financial budget of REN.

While the repository is not maintained after the end of the project, all files stored within the repository shall be stored after the project to meet the requirements of good scientific practice. A strategy for storage of the files after the project is being developed and will be included in the DMP later.

4.2 Responsibilities for data management (Data Protection Officers)

According to Art 37 GDPR a controller shall designate a data protection officer if specific criteria are met. The SONYA project data protection (DPR) officers can be contacted through the emails listed below. The DPRs shall deal with and coordinate all data protection topics and measures and shall also be the contact point for data subjects.

Project coordinator has contacted all the partners to certify they have declared a specific contact person responsible for data protection for the project in compliance with the GRDP requirements:

TABLE 1. DPR LIST

Email address	Partner
dpo@rennes-sb.com	REN
protecciondatos@uji.es	UJI
massimo.benedetti@unifi.it	FIR
ilieva1980@ips.bas.bg	IPS-BAS
jesus.sanchez@fundacionelolmo.org	FO
Vincenzo.visetti@ftcoop.it	FTC
Mariq90petrova@gmail.com	ASA
jcandel@zabala.es	ZAB
privacy@deakin.edu.au	DU

DPRs are also responsible of:

- Collecting the users request for access to and download of data.
- Preparing, checking the list of user groups and members for each user group
- Definition, creation, updating of the data repository structure, i.e.: structure of folders and subfolders, names, contents and access, upload, download rights.
- Co-creation with REN of the data repository's folders/sub-folders for each user group and document type (e.g. data, metadata, templates)
- Communication to the users any unplanned interruption of communication tools.

REN responsibilities include:

- Initial set-up of the software components of the data repository
- Setting up and upgrading, when needed, the repository. Maintenance of the data repository
- Carrying out the initial Security assessment of the repository

- Perform Security Assessment on a regular basis (e.g. one year) in order to guarantee the agreed security level
- Reporting and blocking any possible security threat, taking appropriate measures accordingly
- Ensure the creation and management of the internal repository, as one of the components of the data repository.
- Creation, maintenance and upgrading of the User Group Account database.
- Capacity management of hardware and software components
- Comply with personal data protection rules (Regulation EC 45/2001)

REN is not responsible for the interruptions of the data repository services that are due to force majeure.

5. Data security

5.1 Data confidentiality and integrity

The data confidentiality and integrity are implemented at various levels:

- None of the data generated in this project are considered sensitive data, thus data security regulations are deemed not necessary. Locally stored data in each partner facilities may be at risk for data recovery depending on routines in operation under institutional policies. Partners are expected to adopt suitable tested backup strategy that allow for full recovery of the data in case of a catastrophic event in which the responsible person or location of the data storage is compromised. The responsibility for data security and long-term storage lies with the institutions.
- In general, consortium will share information to elaborate project deliverables using the Teams channel platform for internal communication and an institutional Teams channel account for the project management.
- Currently all project partners have access to the WP folders in the Teams channel platform. In the future, if there is a need to give selective access rights to specific partners and folders, these specific folders will be created, and the limited access rights will be granted.
- More specifically, if any of the partners has confidential and/or sensitive data, they will send it directly by email to the final recipient to which they want to send such information.
- Consortium partners will impose a strict policy on all employees, co-workers, subcontractors having access to the data. This policy will include, but is not limited to, allowing copies on local devices only during processing of the data with guaranteed erasure after being processed extending the access control policies to the local copies contractual clauses agreement to terms and conditions before access is granted, etc.
- Data will be anonymized up to the level as to not interfere with the quality of the research. Lastly, awareness on data privacy and security will be enhanced (e.g., by attending a webinar on this matter prior to be granted access to the repository; attending this webinar shall be mandatory at least yearly during the project implementation.)
- All DPRs received a registration form for all persons in each beneficiary entity involved in the project and REN has proceeded to selectively invite each of them in the relevant channels to ensure the protection of IPR.

6. Ethical aspects

In the SONYA Grant Agreement (GA), the ARTICLE 14 — ETHICS AND VALUES sets the requirements for the project: “The action must be carried out in line with the highest ethical standards and the applicable EU, international and national law on ethical principles”. The SONYA GA doesn’t include an Annex 5 (specific ethics rules).

Furthermore, during the GA preparation, the Project Officer asked to remove the External expert in Ethics, as long as the project received the Ethics Clearance (the proposal is 'ethics ready') in the Ethics Summary Report.

Therefore, SONYA beneficiaries must ensure that all ethics issues related to activities in the grant are addressed in compliance with ethical principles, the applicable international and national law, and the provisions set out in the GA. For each ethics issue applicable, beneficiaries must follow the guidance provided in the “How to complete your ethics self-assessment” (sections 2-Humans; 4-Personal data; and 6-Non-EU countries). The SONYA main elements regarding ethics are:

- Ethics review – Actions involving human participation:
 - Details on the procedures and criteria to identify/recruit research participants.
 - Templates of the informed consent forms & information sheets (see Annex).
- Ethics review – Actions involving Data Protection and Privacy (DPP):
 - DPP aim.
 - Data Protection Officer.
 - Relevance and technical organization of data collected for the project.
- Ethics review – Actions involving the participation of non-EU countries:
 - Activities undertaken in non-EU countries.

Data transference between EU and Non-EU countries.

7. ANNEX 1: SONYA Consent Form for the Participation in the project

The role of SOcial ecoNomY in Addressing social exclusion, providing quality jobs and greater sustainability (SONYA)

CONSENT FORM

Research action linked to SONYA objective:

O1) To empower the social economy organizations in developing multi-actor social and environmental community initiatives by increasing their organizational capacities.

CONSENT FORM FOR THE PARTICIPATION in the project SONYA

By giving your consent to participate in interviews, focus groups, workshops and/or knowledge transfer actions, you authorise selected members of the SONYA Consortium (data controller) to use your data in accordance with the privacy policy described below. You may withdraw your consent at any time. The withdrawal of consent shall not affect the lawfulness of processing based on consent before the withdrawal.

I authorize the use of my data:

☐Yes ☐No

Names or personal identifier number:

Note: This number is necessary if you wish to access your data at a later stage and choose not to reveal your full name.

Example: 0405IV: 04/05/I(for Ina)/V (for Verdi)
(Day of birth/Month of Birth/First name Initial/Last Name Initial)

Acknowledgement of acceptance

Date and place

Signed

Privacy policy: In accordance with the provisions of the General Data Protection Regulation (EU) 2016/679 of April 27, 2016 (GDPR), we inform you that the personal data and questionnaires, collected from you during the interviews, focus groups, workshops and/or knowledge transfer actions or from public sources, will be treated under the responsibility of SONYA Consortium data controllers (these

Consortium members are considered joint controllers within the meaning of Art 26 GDPR), for analysing project results and sending communications about events with interested parties (contacts, employees, beneficiaries at other research institutions, social economy organisations, private and public bodies). We may share anonymous quotes from this interview/focus group on online academic archives and in academic reports to support future research on the topic. The legal basis of processing your data is your free and informed consent to participate in the project, see Art 6(1)(a) and Art 9(2)(a) GDPR. Your data will be kept until the end of the SONYA research project for a maximum of 10 years as long as there is a mutual interest to do so or until you withdraw your consent given above. The personal data will not be transferred or communicated to third parties outside the Consortium.

Data controller

Rennes School of Business (RSB), 2 rue Robert d'Arbrissel, CS 76 522, 35 065 RENNES. Member of SONYA Consortium.

Place of data use

The information will be used strictly confidentially by the Consortium for social research. All the personal data collected from questionnaires will be integrated and pseudo anonymized before transferring it or fully anonymised if personal data is not relevant. Personal data will be kept in Europe only.

Purpose

Your data will be used in the EU project SONYA to evaluate resources and barriers for local social and environmental community actions in Vidin (BG), Trento (IT), and Valencia (ES), focusing on their potential to meet the social care needs of older adults and care workers in these areas.

Type of data used

Personal data voluntarily provided by you during the interview, focus group, workshop and/or via email or online questionnaire on RSB Microsoft Forms platform and/or other knowledge transfer actions.

Provision of data: Registering on the application, filling in project questionnaires or sending one's own personal data imply giving consent to the use of data for the above-mentioned purposes.

Mode of use

Rennes School of Business as the responsible consortium member for the data collection in Bulgaria, Italy and Spain will ensure that identifying information (personal details) will be replaced by an identification number (pseudonymized data). The file that links the identification number to personal details is kept only by the consortium partner collecting the data in a secure place. Solely the pseudonymized data file will be shared among a select group of other consortium members (see section Data controller) who will use the data as described above.

Rights of the parties

We inform you that you can exercise the rights of access, rectification, portability and deletion of your data and those of limitation and opposition to your treatment by addressing an email to dpo@rennes-sb.com. If you consider that the treatment does not comply with current regulations, you can submit a claim to the competent supervisory authority, e.g. to the authority in France at <https://www.cnil.fr>.

8. ANNEX 2: SONYA Information Form for the Participation in the project

The role of SOcial ecoNomY in Addressing social exclusion, providing quality jobs and greater sustainability (SONYA)

INFORMATION FORM

This research action is linked to the following SONYA objective:

O1) To empower the social economy organizations in developing multi-actor social and environmental community initiatives by increasing their organizational capacities.

HORIZON Research and Innovation project Funded by the European Union

Funded under: Culture, creativity and inclusive society

Grant agreement ID: 101177171

DOI: [10.3030/101177171](https://doi.org/10.3030/101177171)

Thank you for considering participation in this research project. Before deciding to take part, it is important to understand the purpose of this research and what your participation involves. Please read the following information carefully. If anything is unclear, feel free to ask for clarification using the contact details provided at the end of this sheet.

What is the purpose of this study?

SONYA aims to enhance the role of social economy organizations within multi-actor rural community networks, supporting conditions that attract and support formal and informal (family) workers providing social care for older adults. Through collaboration and innovation, the project promotes sustainable, community-driven care models, making rural areas more resilient, socially inclusive, and age-friendly.

This study serves the following SONYA's objective:

To empower social economy organizations to develop multi-actor social and environmental community initiatives by enhancing their organizational capacities.

Why have I been chosen to take part in this study?

You have been invited to participate because you have valuable knowledge and experience relevant to developing social and environmental community actions promoting the well-being of carers and active aging of older adults in rural regions.

Who is carrying out this study?

SONYA is implemented by a consortium of scientific partners and social economy partners. The **scientific partners** include **Institute of Philosophy & Sociology - Bulgarian Academy of Sciences** (Bulgaria), **Rennes School of Business** (France, Coordinating institution), **Universitat Jaume I de Castellón** (Spain), and **Università degli Studi di Firenze** (Italy) and **Deakin University** (Associate Partner, Australia). The **social economy partners** include **Active Society (ASA)** (Bulgaria), **Federazione Trentina della Cooperazione (FTC)** (Italy), and **Fundación El Olmo (El Olmo)** (Spain).

Funded by the European Union under Grant Agreement N°. 101177171.

Views and opinions expressed are however those of the author(s) only and do not necessarily reflect those of the European Union.

Rennes School of Business (RSB) coordinates the project and oversees the data collection. Researchers from RSB, ASA, FO, and FTC will conduct the data collection. Data analysis will be performed by RSB and IPS-BAS using anonymized or pseudo-anonymized informant data.

Do I have to take part?

Participation is entirely voluntary. You can decide whether to take part or not and keep this information sheet for reference.

What should I expect by participating in this study?

If you agree to participate, you may be asked to respond to questions via email, an online questionnaire on Microsoft Teams, an interview, or a discussion group. If participating in an interview or a group discussion, permission to record the session for accurate data collection will be requested.

How will my confidentiality and anonymity be protected?

Access to personal information is exclusively limited to consortium members for the benefit of Sonya research objectives. All materials, recordings, and transcripts will be stored securely at Rennes School of Business data repository. We may use some of your anonymous comments in reports or on online research archives to help others learn more about this topic.

What are the possible costs or risks of taking part in this study?

The main cost is the time required to answer questions or participate in discussions. You may withdraw participation at anytime at your discretion.

What are the benefits of taking part?

Your feedback will contribute to research and innovation and EU policy recommendations to support the development of sustainable and inclusive multi-actor models of social care for older adults in isolated areas including the regions of Vidin, Valencia, and Trento.

Who to contact for further details or if I have a question?

In Bulgaria: Active Society (ASA)*: aktivnoobshtestvo@gmail.com

In Spain: FO*: administracion@fundacionelolmo.org

In Italy: FTC*: elena.badeanschi@ftcoop.it

In France RSB data controller*: Rennes School of Business at dpo@rennes-sb.com

*Note: please mention "SONYA" in your email

ⁱ In all instances "Social elderly care" was replaced by « social care for older adults » as the term « elderly » conveys ageism stigma associated with frailty and dependency. See World Health Organization. *Quick Guide to Avoid Ageism in Communication*. 11 June 2021. World Health Organization, <https://www.who.int/publications/m/item/quick-guide-to-avoid-ageism-in-communication>.