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RETLAMI-SEE

Deliverable 8.5 – Updated data management plan

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List of abbreviations used in this document

CC – Creative Commons

D – Deliverable

DMP – Data Management Plan

DOI – Digital Object Identifier

EU - European Union

GA - General Assembly

GDPR – General Data Protection Regulation

IOS – Leibniz Institut für Ost- und Südosteuropaforschung

IPR – Intellectual Property Rights

ORCID - Open Researcher and Contributor ID

PC – Project Coordinator

UNIBL – University of Banja Luka

UNIVIE – Universität Wien

WP – Work Package

ZRC SAZU – Znanstvenoraziskovalni center Slovenske akademije znanosti In umetnosti

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Executive Summary

This document presents the updated Data Management Plan (DMP) which was developed as D8.2 (month 6). The updated DMP describes the procedures for handling the data during and after the end of the RETLAMI-SEE project. The DMP provides an overview of the purpose, format and openness of data to be collected, re-used and generated throughout the RETLAMI-SEE lifespan. The document also outlines which procedures will be established to ensure compliance with the FAIR standards. The DMP is a living document and is continuously monitored throughout the RETLAMI-SEE duration.

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Introduction

The RETLAMI-SEE Updated Data Management Plan (DMP) provides an overview of the data and information expected to be collected, re-used and generated throughout the project lifespan. The DMP outlines the procedures and standards to be followed in data collection, protection, storage, retention and compliance with relevant European Union (EU) and national legislation.

This version of DMP presents an update of *D8.2 Data Management Plan* developed in month 6 of the project.

Data Summary

Throughout RETLAMI-SEE project lifespan, we will re-use existing data and generate new data in order to successfully implement all envisaged activities across Work Packages (WPs). Table 1 below summarizes datasets, explaining their purpose, origin, format and size, as well as links towards specific WPs.

Table 1. RETLAMI-SEE datasets

Dataset	Related WP	Purpose / origin / format and size
Dataset 1	WP1	Purpose: This Dataset collected key data on UNIBL FPN at organisational level, including research outputs per academic staff, data on PhD students, funding, research areas, used as input for *D1.1 Map of the research and RMA potentials at the Faculty of Political Sciences and UNIBL.* Origin: Self-assessment report, RETLAMI-SEE generated data. Format and size: Descriptive (.PDF, .DOCX) / up to 10 MB.
Dataset 2	WP1	Purpose: This Dataset collected insights from twelve interviews with full and associate professors of the faculty's departments, four PhD candidates (one from each department), two employees of the administration, the dean of FPN, and the vice-rector for science and research of UNIBL, used as input for *D1.1 Map of the research and RMA potentials at the Faculty of Political Sciences and UNIBL.* Origin: RETLAMI-SEE generated data based on interviews. Format and size: Descriptive (.PDF, .DOCX) / up to 10 MB, Audio (.MP3) / up to 700 MB.
Dataset 3	WP2 & WP3	Purpose: This Dataset provides information on the implementation of trainings, workshops, study visits, and summer schools within WP2 and WP3, providing input for the deliverables *D2.1, D2.2, D3.1, D3.2,* and *D3.3*. Origin: RETLAMI-SEE generated data based on reports, presentations, audiovisual materials (recordings) and lists of participants from trainings, workshops, study visits and summer schools. Format and size: Descriptive (.PDF, .DOCX) / up to 10 MB, Presentations (.PPTX) / up to 15 MB, Photos (.JPEG) / up to 10 MB, Audiovisual (.MP4) / up to 700 MB.

Dataset 4	WP4 & WP5	Purpose: Contains collected interview recordings, notes and transcripts, a list of secondary literature, information on archival holdings relevant for the topic, as well as statistical data serving as an input for *D5.1 Database completed with interview transcripts, archival material and secondary literature.* Origin: RETLAMI-SEE generated data (collected interviews) and re-used data (archival holdings, statistical data). Format and size: Transcripts (.PDF, .DOCX) / up to 10 MB, Audio (.MP3) / up to 700 MB, Audiovisual (.MP4) / up to 700 MB, Photos (.JPEG) / up to 10 MB, Tables (.XLSX) / up to 15 MB, Exported "Code System" (.MTR) / up to 10 MB.
Dataset 5	WP4 & WP5	Purpose: This dataset provides collection of data with locations, timeline of migration routes, trajectories, labour conditions and personal histories of migration based on collected interviews, secondary literature, archival holdings and statistical data collected through WP4, and serves as input for *D5.2 Digital interactive map and timeline of migration routes, trajectories, and personal histories of migration.* The online map will be embedded in the website using an appropriate platform. The map will be hosted on the platform and integrated into the project website through an embed code, allowing users to interact with the data directly on the site. Origin: RETLAMI-SEE generated data (collected interviews, developed map with timeline and trajectories) and re-used data (archival holdings, statistical data). Format and size: Exported MAXMAp (.MOD) / up to 10 MB, MAXQDA 24 project file (.MX24) / up to 20 MB, CSV/GeoJSON (primary), optional KML or Shapefile (zipped), and a web package (HTML/JS/CSS as .zip) or hosted URL + iframe embed.

Data utility: Datasets 1, 2 and 3 are useful for the UNIBL and Faculty of Political Sciences management for monitoring and improving institutional policies focusing on building research capacities and internationalization. Datasets 4 and 5 are useful for researchers focusing on the topic of labour migration and transformations, as well as policy makers.

The naming convention used for datasets is the following: Dataset NUMBER_RETLAMI-SEE_VERSION_DATE (DDMMYYYY)", as in the following example "Dataset 1_RETLAMI-SEE_v01_12122024".

Current DMP will be updated in case additional datasets are identified throughout the RETLAMI-SEE lifespan.

FAIR data

Wilkinson et al. (2016) provide the guidelines for improving the infrastructure supporting the reuse of scholarly data and define a concise and measurable set of principles that they refer to as the FAIR Data Principles: Findability, Accessibility, Interoperability, and Reusability.

The RETLAMI-SEE project is committed to adhering to these principles and thus to maximizing the added-value of data collected in the lifespan of the project.

● Making data findable, including provisions for metadata

RETLAMI-SEE beneficiaries are committed to ensure that all project-relevant and generated data are findable. This is provided by the following set of measures:

- Ensuring that all RETLAMI-SEE relevant collected and generated data which can be made openly accessible (under proper licenses and ensuring respect for GDPR) are stored and findable in an online trusted repository suitable for the type and format of data collected or generated. Such repositories can be institutional repositories of RETLAMI-SEE beneficiaries such as the UNIVIE PHAIDRA system or IOS LaMBDaλ (Research Data Portal of IOS), ostdata (research data repository of several research institutions on East and Southeast Europe in Germany) or in IOS "Digital Collections" and other trusted repositories (such as Zenodo or ArXiv). The criteria for selection of online repository is that it has to enable identification of data and refer to standard identification mechanisms such as Digital Object Identifiers (DOI), ORCID, Scopus ID etc.
- Ensuring that RETLAMI-SEE outputs and datasets are cross-referencing each other.
- Provide keywords to enable refined search across datasets. Keywords should reflect the content of RETLAMI-SEE publications and datasets, bearing in mind specific subject area ontology (or if none then create a taxonomy) to ensure that these are easily findable by researchers.
- Implementing the naming convention with the date as suffix while storing the files into the selected repository(ies) indicating the last version of the file uploaded.
- Providing machine-readable metadata to ensure automatic discovery of RETLAMI-SEE outputs and easier harvesting by different open access relevant services.

Each WP leader is responsible for organisation, data collection and selection of the most convenient format for storing and depositing relevant data in an appropriate open access online repository.

● Making data accessible

RETLAMI-SEE ensures adequate dissemination of the project results and deliverables in line with the Grant Agreement. Selected data and results are shared with the different stakeholders through publishing in scientific journals, presentations at conferences, as well as by depositing and ensuring open access through trusted repositories (as outlined in the previous section). WP leaders address the General Assembly (GA) for review and approval of publishing the WP relevant data in open access format. In order to facilitate the timely publication of appropriate data, the WP leaders and GA perform this process on an ongoing basis and not restrict it to regular GA meetings. This is done either through ad hoc online meetings or email correspondence.

As indicated in the Grant Agreement, all RETLAMI-SEE generated data are made openly accessible, unless there is a clear justification for otherwise following the principle "as open as possible, as restricted as necessary". Based on the WP leaders request and justification, the GA assesses and makes the final decision based on: (a) whether the data are sensitive and confidential for security or privacy reasons, (b)

whether there is a conflict between national and EU-level GDPR and open access rules, (c) whether sharing of the data could in any way impede objectives of the RETLAMI-SEE project.

Table 2 reflects the levels of accessibility of currently identified data to be generated or re-used throughout the RETLAMI-SEE lifespan. The table will be updated as necessary depending on the next version of DMP.

Table 2. Levels of accessibility of data

Dataset	Related WP	Open / Restricted	Reason for restriction
Dataset 1	WP1	Partly restricted	Financial data are restricted for the public and can be provided only upon request in accordance with the Law on Freedom of Access to Information of the Republika Srpska.
Dataset 2	WP1	Restricted	The interviewees have signed a consent form stating "The interviews archived by the academic partner institutions will not be made available to third parties. Personal data will not be published. The expected duration of the participant's involvement is defined by the duration of the project (36 months)."
Dataset 3	WP2 & WP3	Partly restricted	Some personal data (of participants) have to be restricted in accordance with GDPR.
Dataset 4	WP4 & WP5	Partly restricted	Personal data (especially for interviews) have to be restricted in accordance with GDPR and ethical compliance. This is further addressed in D8.3 Ethical Procedures Framework.
Dataset 5	WP4 & WP5	Open	N/A

The following measures for ensuring accessibility of data apply:

- RETLAMI-SEE data used in planned scientific publications related to WP4, WP5 and WP6, are made accessible via open-access online platforms in line with the Grant Agreement provisions on full open access.
- Once stored in a trusted repository and assigned a proper identifier, data can be shared with other researchers through direct correspondence and based on the request full publication access through social networks such as ResearchGate, LinkedIn or Academia.
- RETLAMI-SEE generated video materials are provided in full open access format as embedded into RETLAMI-SEE website.
- All relevant RETLAMI-SEE results with dissemination level "public" are made accessible through CORDIS web portal (https://cordis.europa.eu/project/id/101158885) as well as on the RETLAMI-SEE website (tab Resources).

Making data interoperable

The selection of an open trusted repository (either institutional or other) is based also on the criteria of interoperability with other services that provide or offer metadata about scientific publications and datasets. In selecting the adequate trusted repository, RETLAMI-SEE beneficiaries check whether the repository respects Dublin Core and Open Archives Initiative Protocol for Metadata Harvesting (OAI-MPH) as international standards allowing for interoperability, based on collecting, processing and sharing metadata. RETLAMI-SEE uses the existing metadata code list register as defined in the INSPIRE (https://inspire.ec.europa.eu/metadata-codelist). The standard vocabulary for social sciences and humanities is used. RETLAMI-SEE ensures interoperability of data by using ontologies to enable further exchange and re-use of data. Metadata are provided under *Public domain - No rights reserved* Creative Commons (CC0) or equivalent.

Increase data re-use

In order to increase data re-use, RETLAMI-SEE data will be presented to different stakeholders through a dedicated set of dissemination, communication and exploitation activities. RETLAMI-SEE will provide information on methodology and codebooks for all research-generated data through readme files along with datasets uploaded in the trusted repository. Potential users of the RETLAMI-SEE data will adhere to the selected trusted repository Terms of Use, which also applies to the use by Third Parties after the end of the project. For data and research outputs Creative Commons Licences will be selected and applied. The Work Package Leaders are responsible for assuring the quality and consistency of the data collected and provided in the trusted repository throughout the RETLAMI-SEE implementation. Data reusability is 5 years after the end of the RETLAMI-SEE project. Prior to using collected raw data for publishing purposes after the project ends, project partners should consult with the whole consortium on the modalities of use.

Allocation of resources

Costs for making data FAIR are eligible for reimbursement under the conditions defined in the Grant Agreement. Article processing charge (publication fees) for the RETLAMI-SEE articles that will be published in gold open access journals have been included in the RETLAMI-SEE project budget planning to enable greater visibility of the project achievements. In addition to that, RETLAMI-SEE will also seek opportunities for publication in diamond open access journals (https://doi.org/10.5281/zenodo.4562828). Long term preservation is ensured through depositing data in trusted repositories.

The Data Protection Officer (DPO) of the RETLAMI-SEE project is:

Anđela Pepić, PhD, Assistant Professor
University of Banja Luka
Bulevar vojvode Petra Bojovića 1A
78000 Banja Luka, Bosnia and Herzegovina
e-mail: andjela.pepic@unibl.org

The DPO is responsible for ensuring the highest standards of data protection in line with the GDPR, as well as valid national regulations. In that sense, the DPO will monitor and take due care for the security measures to prevent unauthorized access to personal data, deleting all data that are not relevant immediately from the record. The DPO will, in collaboration with the WP leaders, work on storage of the data, collection, recording, structuring restriction, erasure, availability and destruction of the data. Furthermore, the DPO ensures that the relevant documents are kept at least until the end of the required

5 years retention.

Data security

Datasets collected and generated during the RETLAMI-SEE project are stored on the responsible partner's password protected storage system. Data will be stored safely and securely in compliance with relevant EU and national data protection laws. Upon depositing the dataset to a trusted repository, all responsibilities concerning data recovery and secure storage will go to that particular repository. Research-related data used for scientific publications will be made available for verification and re-use unless there is a justified reason for limiting the availability or keeping specific datasets confidential (see Table 2) in line with intellectual property rights or personal data protection rules.

Ethics

Detailed ethics related procedures dealing with any ethical issues, including data management, that might emerge during RETLAMI-SEE implementation are addressed in D8.3 Ethical Procedures Framework.

Other issues

The Data Management Plan is a living document subject to continuous monitoring and updates, including the quality checks. RETLAMI-SEE considers making use of the existing DMP services such as ARGOS service provided through OpenAIRE, but it will also follow or seek advice from RETLAMI-SEE consortium members' institutional procedures and practices. For example, ZRC SAZU has established protocols of data management and open access. Particular attention is devoted to responsible data management - both during and after the research project. To this end, ZRC SAZU has implemented several different technologies and services, including a local cloud service (Oblak ZRC) with all the necessary technologies to ensure the security of the stored data (encryption, multiple backups, versioning); local networked storage (e.g. NAS servers); and specific technologies/procedures for long-term storage, such as LTO tapes and dislocation storage. ZRC SAZU emphasises the reuse of data and hence makes authorised data available in relevant open repositories. The exception is personal or sensitive data, where more restrictive guidelines are adopted. As this is a highly sensitive and complex area, researchers can seek help from ZRC SAZU data stewards, Ethics Committee and Legal Office, but ZRC SAZU also seeks the opinion of external specialists covering narrower areas of expertise when necessary. This is particularly relevant regarding the data storage and management of ethnographic data that has been under constant reconsideration in the dialogue between regulation and the scholarly community.

References

Wilkinson, M., Dumontier, M., Aalbersberg, I. et al. The FAIR Guiding Principles for scientific data management and stewardship. Sci Data 3, 160018 (2016). https://doi.org/10.1038/sdata.2016.18