



PIE NEWS PROJECT HANDBOOK

D1.1

Fig. 01

Project:	PIE News – Poverty, Income, and Employment News (H2020-ICT-2015/H2020-ICT-2015)
Duration:	1st July 2016 – 30th June 2019 (36 months)
Contract number:	Grant Agreement Number 687922
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The overall ambition of the PIE News project is to foster the emergence of commonfare as an alternative economic model to fight poverty, a condition affecting some 25% of the European population. In order to reach this goal, a structured project management is needed. The present Project Handbook is intended to provide a complete guide for all members from partner organizations. The aim is to ensure the compliance with shared rules, a crucial step for fostering also quality and ethical issues. The Project Handbook deals with project implementation, administration and finance, communication protocols, ethics and data management. It has been prepared in compliance with the Grant Agreement and the regulation set by the European Commission.



European Commission

This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 687922



EXECUTIVE SUMMARY

Fig. 02

This document presents the policies adopted by the project consortium to ensure that internal procedures, administrative/financial limits, ethical requirements and rules on Open Access to Publications and Open Research Data are met. Following the described procedures, the quality of the project enhances. Especially, this document sets the principles used by the consortium in managing the data produced during the project and the policies and technical measures taken to protect people privacy and data security in case personal data is collected during the research. In particular, this Deliverable details the procedures that the consortium adopts to make all scientific publications, both peer-reviewed and non-peer-reviewed, fully available according to Open Access best practices, guaranteeing that they are correctly archived in multiple repositories, available through the project web site and properly indexed through metadata. Regarding

Data Management, the document details the types of data that PIE News will handle and the procedures undertaken to guarantee that no personal or sensitive data are exposed beyond the boundary clearly defined during the data collection procedure, and that this boundary, as well as the person responsible for the data collection and protection, are clearly understood by the people involved in the data collection. Given the crucial importance of the topic, the chapter related to Data Management Plan is, at this stage, a first version that will be updated at M6 with Deliverable 1.2. Given the topic and matter of Open Access, but most of all of Open Research Data, are evolving extremely fast, amended versions of this Deliverable will be produced if changes in the norms and regulations, management, or best practices of data management occur before M6. For what concerns Ethics requirements, specific and more detailed documents will be produced through the activities of Work Package 6.

DOCUMENT REVISION HISTORY

DATE	VERSION	AUTHOR	SUMMARY OF CHANGES
20/09/2016	V1.0	Chiara Bassetti	First draft
27/09/2016	V1.1	Chiara Bassetti	Revisions after Consortium internal review: typos correction; added information in section 2.2 Finance
29/09/2016	V1.2	Chiara Bassetti	Revisions after UNITN internal review by Antonella De Angeli (PC), Mirella Collini (PAM), and Vanessa Ravagni: typos corrections and rephrasing; updated information in sections 2.2 Finance and 3.3 Communication plan
30/09/2016	V1.3	Chiara Bassetti	Revisions after Maurizio Teli (RIC) and Francesco Botto (TC) review: minor changes and additions concerning technical tools adopted by the consortium and dissemination

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ACRONYMS

ACRONYM	MEANING	ACRONYM	MEANING
AU	Abertay University (United Kingdom)	OA	Open Access
BIN	Basic Income Network (Italy)	OAI-PMH	Open Archives Initiative Protocol for Metadata Harvesting
CA	Consortium Agreement	ORD	Open Research Data
CAPS	Cooperative Awareness Platforms for Sustainability	PAM	Project Administrative Manager
CMS	Centre for Peace Studies (Croatia)	PC	Project Coordinator
CN	CREATE-NET (Italy)	PDF	Portable Document Format
CNs	Community Networks	PH	Project Handbook
CoP	Communication Plan	PL	Project Leader
DL	Digital Libraries	PR	Peer-reviewed
DOI	Digital Object Identifier	RIC	Research and Innovation Coordinator
DYNE	Stichting Dyne.org (the Netherlands)	RP	Reporting periods
EC	European Commission	SF	Stichting STAFF (the Netherlands)
FAQ	Frequently Asked Questions	TC	Technical Coordinator
GA	Project General Assembly	UNITN	University of Trento (Italy)
M-ITI	Madeira Interactive Technologies Institute (Portugal)	VIG	Visual Identity Guidelines
NPR	Non-peer-reviews	WPL	Work Package Leader

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1. CHAPTER: PROJECT MANAGEMENT

The PIE News provides the present Project Handbook (PH) to establish and clarify several rules and procedures that contribute to the overall quality of the project itself. The PH in fact concerns the overall project management, its administration, communication protocols, quality procedures, ethical issues, and data management. Each partner and supporting organization involved in the project is expected to abide by the rules and procedures stated in this PH in order to allow the correct proceeding of activities.

The main reference is the EU Grant Agreement (#687922) and the Horizon2020 regulation.

As decided during the planning phase, the Project Management (PM) ensures that the pilot solutions are developed and tested (work packages 2 and 4), project members gain evidence and understanding of the processes of collective awareness (work packages 3 and 4), and the detection of pioneering mechanisms for social innovation (work packages 2 and 5). The lead partner for each work package (WP) is responsible for the coordination of the activities related to his/her WP.

UNITN is the lead partner of the overall Project Management (WP1), which the present Project Handbook exploits.

Effective project management is a key component of the PIE News project. Project management consists of all technical and administrative management, as well communication protocols, ethical procedures and data management procedure. The Project Management activities involve close and dedicated focus on ensuring ongoing successful collaboration among the partners, with civil society organizations, with other EU projects, and with the public at large. The Project Coordinator (PC) and Project Leader (PL) carry the responsibility for the quality – in content and form – of all project deliverables, together with Research Innovator Coordinator (RIC) and the Technical Coordinator (TC). The present Project Handbook, coherently with the project management procedures, spans the full lifecycle of the project, from month 1 to month 36. Project Management concerns each WP (Table 1) and related tasks.

The partner organizations involved in the project are University of Trento (UNITN from Italy), Basic Income Network Italy (BIN from Italy), Centre for Peace Study (CMS from Croatia), Stichting STAFF (SF from the Netherlands), CREATE-NET (CN from Italy), Stichting Dyne.org (DYNE from the Netherlands), Abertay University (AU from United Kingdom), and Madeira Interactive Technologies Institute (M-ITI).

WORK PACKAGE DESCRIPTION	LEAD PARTNER ORGANIZATION
1 - Project management	UNITN
1.1 - Project Organization and Planning	UNITN
1.2 - Scientific and Innovation Coordination	M-ITI
1.3- Technical Coordinator	CN
1.4- Quality Assurance	UNITN
1.5- Reporting and Administrative/Financial Coordination	UNITN
2 - Pilot Actions	BIN
2.1 - Research Phase	BIN
2.2- Public Design Phase	UNITI
2.3 - Training and Providing Capabilities	SF
2.4- Local Events and Seminar toward Sustainability	CPS

3 - Social Dynamics	AU
3.1- Qualitative User Research on Social Capital and Digital Currency	AU
3.2- Reputation System Mechanics	AU
3.3- Digital Currency Model	DYNE
3.4- Network Dynamics Analysis and Algorithm	CN
4 - Public Design and Technological Implementation	CN
4.1- Design of Information Architecture, Functionalities, and Interface	UNITN
4.2- Technical Solution for Reputation	AU
4.3- Network Dynamics Monitoring and Evaluation	CN
4.4- Platform Integration	CN
5 - Dissemination, Evaluation and Sustainability	CN
5.1- Communication	CN
5.2- Public Engagement	M-ITI
5.3- Project Evaluation	CN
5.4- Promoting the Commonfare	BIN
6 - Ethics Requirements	UNITN

Table 1 List of Work Packages

Figure 1 represents the connections among the WPs. Pilot sites (WP2), design and implementation (WP4) and dissemination and evaluation (WP5) proceed in parallel, interconnected by the PIE News Design Workshops. They constitute the basis around which the social research activities (WP3) and the dissemination and evaluation (WP5) revolve, strengthening the activities in the pilot sites in terms of a deep understanding of social dynamics (WP3) and of promotional activities (WP5). WP4 will provide different

implementations of the platform (WP4) that will be both attracting people and, with the support of the actions in the pilot sites (WP2), tested and evaluated (WP5). Moreover, the interrelation among the design process (WP4), the pilot sites (WP2) and the dissemination activities (WP5), with the incremental integration of advanced functionalities like the PIE News Networking Hub, will constitute the basis upon which the long-term sustainability of PIE News will be achieved.

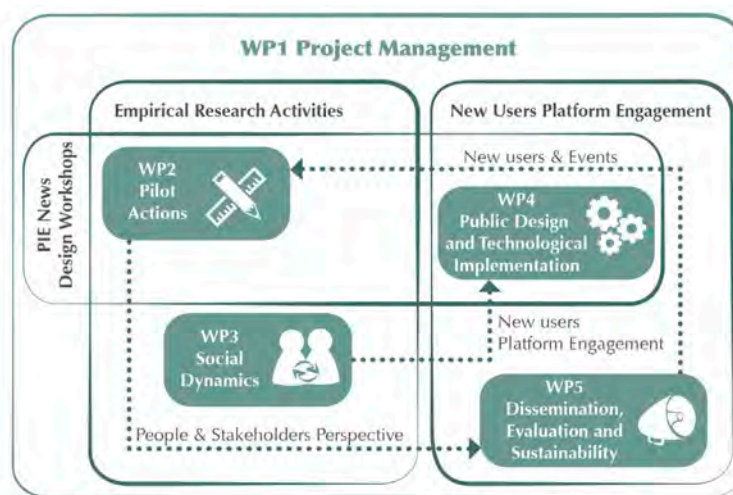


Figure 04 Relations Among the WPS

The goal of WP1 (Project Management) is to oversee the overall management activities related to the project. It is structured in four main and intertwined areas:

- ▶ Project Administration: this section concerns agreements, legal issues, administrative and financial matters;
- ▶ Coordination and Communication Protocols: this section concerns the coordination system, internal and external communication, dissemination, and internal visual identity guidelines;
- ▶ Quality Assurance: meant as a Quality Assurance Plan, this section concerns the work progress evaluation, the documents production process, and the quality assurance inspection and review;
- ▶ Ethical Issues: this section concerns safety and security issues and privacy issues and it is strictly related to the Data Management Plan, concerning Open Data Pilot and Open Access.

1.1 PROJECT MANAGEMENT TASKS

The PM is realized through 5 tasks listed below.

Task 1.1. Project organization and planning (UNITN).

The purpose of this task is to ensure a proper co-ordination across work activities, components and partners to achieve the overall project objectives within time and budget constraints. Towards these goals, this task includes the following activities: 1) Organization of the project meetings; 2) Progress and quality monitoring, tracking, and reporting; 3) Ensure communications among the partners to be at all levels; 4) Coordinate consortium reactions when problems arise. A coordination role in planning and organizing the project work is given to the Project General Assembly (GA) whom roles and responsibilities are detailed in section 1.2. Professor Antonella De Angeli and Dr. Chiara Bassetti from UNITN serve as Project Coordinator (PC) and Project Leader (PL) respectively.

Task 1.2. Research and Innovation Coordination (M-ITI & UNITN).

Research and Innovation coordination is assured by the Research and Innovation Coordinator (RIC), responsible for monitoring the research and innovation achievements of the project and for ensuring the accomplishment of research and innovation objectives. Dr. Maurizio Teli from M-ITI serves as RIC. He works in close collaboration with the PL and PC from UNITN, as well as the GA and the pilot and academic partners to ensure the research and innovation excellence of the PIE News project and its outputs. A crucial action is the preparation of a Data Management Plan balancing the needs of the Open Research Data Pilot and of the project.

Task 1.3. Technical Coordination (CN).

Technical coordination is assured by the Technical Coordinator (TC) responsible for monitoring the technical achievements of the project, ensuring the accomplishment of the technical objectives, and managing a software and reports repository. Fabio Antonelli from CN serves as TC and works in close collaboration with the PC, the PL, the RIC, and the research and technical partners to ensure the technical excellence of the PIE News project and its outputs.

Task 1.4. Quality Assurance (UNITN).

The implementation of the work plan is controlled by ensuring: (i) the quality of and the compliance to the procedures agreed by the GA; (ii) the quality of the intermediate and final deliverables; (iii) the quality of the final product and its conformance to acceptable standards of privacy, data confidentiality, operation, safety, security, etc. Within this task the RIC and PL ensure that the above goals are met. RIC and PL activities include: selecting peer reviewers (internal to the PIE News consortium) and supervising the integration of the peer reviewers' comments into the results of the project. Part of the Quality Assurance activities are the WP6 (Ethics Requirements) and the production of an Ethics report (by M6). The ethics committee

of the coordinating partner is leveraged when necessary to produce ethics analysis and validation for the all project work and for all partners.

Task 1.5. Reporting and Administrative/Financial Coordination (UNITN).

This task aims at producing the project reports. Interim and Annual reports will be prepared for the European Commission. The PC asks for specific contents to each project partner in order to coordinate the overall narrative and perspective of the reporting. Activities include: document and periodic reports production and archive; costs to be controlled; costs to be coordinated and consolidated; European Commission (EC) payments and distribution coordination and follow-up. Mrs. Mirella Collini from UNITN is responsible for the administrative and financial coordination.

Even if UNITN is the lead partner for what concerns project management, in this kind of activity it is important to involve the remaining partner organizations in the management of the actions in a way which:

- ▶ Preserves transparency;
- ▶ Ensures quick communication of progress on the project to the partners and with the EC;
- ▶ Provides regular opportunities to review the progress of the project, to anticipate problems, to intervene or to carry out adjustments to the work programme with a little or no delay.

1.2 COORDINATION FIGURES

The PIE News project management will be performed by the PC, and in constant collaboration with the Project General Assembly (GA), consisting of the following coordination and management figures:

- ▶ The Project and Scientific Coordinator (PC from UNITN), who chairs the Project Steering Committee;
- ▶ The Research and Innovation Coordinator (RIC from M-ITI), who ensures the quality of the research and innovation activities carried out;
- ▶ The Project Leader (PL from UNITN), who monitors the progress and quality of the project activities and ensures effective coordination and communication among WP and task leaders;
- ▶ The Technical Coordinator (TC from CN), who is chairing the technological integration;
- ▶ The Project Administrative Manager (PAM, an experienced person from the financial and administrative coordinating partner, UNITN);
- ▶ General Assembly (GA): involving all project participants. One representative per partner is delegated to vote.

The General Assembly (GA) is the central decision

committee and is responsible for the overall management decisions related to running the project toward success. It is also responsible for resolving all major problems that may arise. All members of the GA have an equal say in the project. Where necessary, decisions will be taken by voting, where each consortium partner will have one vote. In cases of equal number of votes, the Project Coordinator's decision prevails.

The GA makes decisions on strategic issues like (i) attending contractual matters, (ii) controlling financial matters and time schedules, (iii) monitoring overall technical achievement and progress against the project plan, (iv) reallocating the budget from one partner to another due to non-performance, (v) removing a partner from the project, and (vi) compliance with the contract and the consortium agreement conflicts. GA meetings are held at the beginning of the project and normally every six months or at any time may be needed on request of at least three partners (see sect. 3.1).

The relationships between all PIE News partners is defined and detailed in a formal and binding Consortium Agreement that has been signed at the beginning of the project, and in which partners' roles, responsibilities and mutual obligations are defined for the entire project lifecycle.

The Project and Scientific Coordinator (Prof. Antonella De Angeli, UNITN), in close collaboration with the Project Leader, has the overall responsibility for the running of the project. She is fully active for the whole duration of the project, being responsible for task coordination, smooth cooperation among partners and achievement of overall project objectives. The PC communicates directly with the other members of the GA and handles all relations with the European Commission. Furthermore, the PC arranges the administrative and financial issues regarding either

the internal consortium structure or the formal relations with the EC (e.g. forms gathering and submission, receiving money from the commission and redistributing budget among partners etc.). The PC is responsible for the progress and administration of the project and decides on matters related to the overall work plan. The PC decides, on the basis of reports from the different work teams if actions are necessary to secure the uninterrupted progress of the project as a whole. If a major modification of the overall project or of a particular work plan is required, the decision will be made after consultation with the different teams participating in the project and in constant collaboration with the GA.

The Research and Innovation Coordinator (Dr. Maurizio Teli, M-ITI) is responsible for ensuring (i) the quality of and the compliance to the procedures agreed by the GA, (ii) the quality of the intermediate and final deliverables, and (iii) the quality of the final product and its conformance to acceptable standards of privacy, data confidentiality, operation, safety, security, etc. The RIC selects peer reviewers (internal to the consortium), in agreement with work package leaders and the GA for the revision of key deliverables. The RIC supervises the integration of the peer reviewers' comments into the results of the project. He closely co-operates with the GA, the PC and the PL.

The Project Leader (Dr. Chiara Bassetti, UNITN) works in close collaboration with both the PC and the RIC, thereby serving also as a connection between the two. She is responsible for (i) monitoring the progress and quality of the overall project activities, and for (ii) ensuring effective and timely communication and coordination of activities among partners, WP leaders and task leaders especially.

The Technical Coordinator (Fabio Antonelli, CN) is responsible for monitoring the technical achievements of



Fig. 05

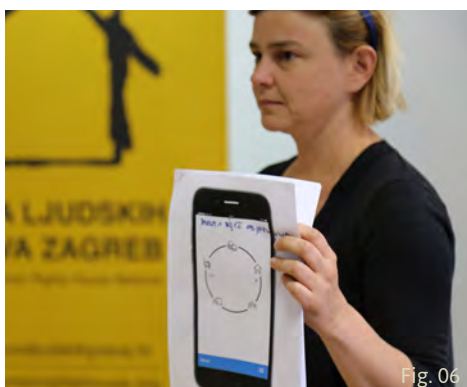


Fig. 06



Fig. 07

the project, ensuring the accomplishment of the technical objectives of the Project and promoting in association with the PC, the project visibility in international forums. The TC is a senior member from the Technical Partners and works in close cooperation with the Technical Team, which consists of members from each technical partner (CN and DYNE).

The Project Administrative Manager (Mrs. Mirella Collini, UNITN) is responsible for the administrative framework of the project and coordinates all the financial reporting and the administrative work associated with the project. The PAM cooperates with the administrative responsible of each partner in order to define with them shared guidelines for the project administration by each partner.

The Work Package Leaders (WPLs) are responsible for the performance of work packages. The WPLs have to ensure the accomplishment of the specific objectives of the work package, to report to the responsible manager and committee (e.g., PC, PL, RIC, and TC), to participate in the relevant meetings, to log major decisions related to the progress of the work package, to co-ordinate the production of major sections of the deliverables, to flag insufficient quality or unacceptable delays in the contribution of individual members and to co-ordinate the production of

external papers in topics dealing with their activities. WPLs have the power to validate or decline labor reports of the partners involved in that particular work package.

For the purpose of coordinating activities in an organized and efficient way, the following meetings are foreseen: General Assembly every six months; WP technical meetings on decision of the WPL (among which the already scheduled PIE News Design Workshops); National/regional implementation meetings linked to the pilot sites; bi-annual exploitation meetings at consortium meetings.

1.3 CRITICAL RISKS

Risk analysis (Table 2) requires the definition of the risk and a specification of the WPs involved. The analysis also includes an indication of possible countermeasures to mitigate the impact of the risk. The structure of the project allows the team to detect additional risks during the execution of the project, while the effective governance of the project enables the development of adequate contingency plans. In particular, the close relation between piloting, design/implementation, and dissemination, will be able to point toward early detection.

RISK DESCRIPTION	WP(S) INVOLVED	PROPOSED RISK-MITIGATION MEASURES
Technological illiteracy target groups	WP2/WP5	Training during pilot sessions
Limited access to the internet/ mobile internet	WP2/WP5	Collaboration with public libraries, bars, community centers that offer free Wi-Fi + computers
Misuse of the platform i.e. a commercial company using it to advertise	WP2/WP3 /WP4	Clear terms of agreement and communication
Privacy and distrust	WP2/WP3 /WP4/WP5	Privacy by design and privacy settings, high level of control over own data, addressing the distrust through appropriate reputation mechanisms
Privileging currency accumulation to circulation	WP3/WP4	Adoption of the principle of demurrage, according to which currency devalues itself after a fixed amount of time
Failure in mobilizing stakeholders	WP2/WP5	Monitor constantly the relations in the pilot sites and the networks mobilized by the project in order to engage in alternative sustainability models (e.g. crowdfunding)
Inadequacy of the technology to the users' needs	WP4	Involve end-users in the design since the beginning, privileging the pilot partners' perspective over the strictly technical one

Table 2 Risk Analysis



2. CHAPTER: PROJECT ADMINISTRATION

Fig. 08

This chapter concerns the administrative and financial rules in compliance with the Grant Agreement and the Horizon2020 regulation. The PAM from UNITN is responsible for the administrative framework of the project and coordinates all the financial reporting and the administrative work associated with the project.

According to the Grant Agreement, PIE News projects starts on 1st July 2016 and ends on 30th June 2019, hence lasting for 36 months.

2.1 ADMINISTRATION

For administrative matters, the reference is to the Grant Agreement, that is structured as follows:

- ▶ Chapter 1: General
- ▶ Chapter 2: Action (Action, Duration and Budget)
- ▶ Chapter 3: Grant (Amount, rates, eligible costs)
- ▶ Chapter 4: Rights and Obligations (resources, in-kind contributions, subcontracts, Grant administration, access rights, protection of results, exploitation, dissemination, gender, equality, ethics, confidentiality)
- ▶ Chapter 5: Division of roles
- ▶ Chapter 6: Rejection, reduction, penalties, termination, recovery, suspension and termination of the action)
- ▶ Chapter 7: Final provisions (accession, entry into force, amendments, applicable law)
- ▶ Annex I: Description of the action
- ▶ Annex II: Estimated Budget
- ▶ Annex III: Accession Forms
- ▶ Annex IV: Financial Statements
- ▶ Annex V: Certificate on the Financial Statements

▶ Annex VI: Certification on the methodology

In compliance with the European Commission's decision, there are two Technical and Financial Reporting Periods: RP1 (M1-M18) and RP2 (M19-36). Both technical and financial reports must be drawn up using the forms and templates provided in the electronic exchange system (participant portal). Each Participant has to upload by itself the reports to the participant portal respecting the deadline given by the Coordinator. Indeed, the Coordinator must submit all the Financial Statements and the Reports within 60 days from the end of each reporting period. At the end of the project, according to the H2020 financial rules, UNITN and CREATE-NET must submit also a Certification on Financial Statement drawn up by an external and independent auditor. Furthermore, the Consortium decided during the kick-off meeting that every six months a summary check of the financial situation of each partner has to be completed.

The Project Coordinator, with the support of the PAM, is responsible for the progress and administration of the project and decides on matters related to the overall work plan.

2.2 FINANCE

The maximum grant amount is €1,994,667.00, covering 100% of the action's eligible costs (Grant Agreement Art. 5.1 and 5.2). The total project effort is 281.50 person-months (Grant Agreement Annex 1), which is a substantial allocation of efforts to guarantee social impact, technological integration, and high quality research and outreach. 66.61% of requested funding are devoted to personnel costs, and 10.78% will be devoted to other costs. In particular, 4.26% is devoted to subcontracting the organization of the PIE News Networking Events and to backing up PIE News Digital Currency through travel support (the remaining 19.35% goes to indirect costs).

The distribution of the funding among partners is detailed in Annex 2 ("Estimated budget for the action") of the Grant Agreement. Payment is subject to the approval of the periodic report. The Project Coordinator will receive the



payments by EC as stated in the Grant Agreement (art. 21.1 - 21.2) and must distribute the payments among the beneficiaries without unjustified delay.

2.2.1 Eligible costs

Horizon2020 budgets distinguish between four basic categories of costs: direct personnel costs, subcontracting costs, other direct costs (travels, equipment, consumables, other goods and services), and indirect costs (25% of eligible costs, excluding subcontracts, costs of resources made available by third parties, and financial support from third parties).

In order to be eligible, costs must meet the criteria foreseen in art. 6 of the GA.

In details:

for actual costs:

- (i) they must be actually incurred by the beneficiary;
- (ii) they must be incurred in the period set out in Article 3, with the exception of costs relating to the submission of the periodic report for the last reporting period and the final report (see Article 20);
- (iii) they must be indicated in the estimated budget set out in Annex 2;
- (iv) they must be incurred in connection with the action as described in Annex 1 and necessary for its implementation;
- (v) they must be identifiable and verifiable, in particular recorded in the beneficiary's accounts in accordance with the accounting standards applicable in the country where the beneficiary is established and with the beneficiary's usual cost accounting practices;
- (vi) they must comply with the applicable national law on taxes, labour and social security, and
- (vii) they must be reasonable, justified and must comply with the principle of sound financial management, in particular regarding economy and efficiency.

In addition, costs are eligible if they comply with the general conditions (see above) and the specific conditions set out below for each of the following budget categories:

A. direct personnel costs;

B. direct costs of subcontracting;

D. other direct costs;

E. indirect costs;

'Direct costs' are costs that are directly linked to the action implementation and can therefore be attributed to it directly. They must not include any indirect costs.

'Indirect costs' are costs that are not directly linked to the action implementation and therefore cannot

be attributed directly to it.

2.2.2 Personal costs

The Personnel costs eligible are described in the art. 6.2 point A of the GA. In particular, the PIE News project is in the following situation:

- ▶ personnel working for the beneficiary under an employment contract (or equivalent appointing act) and assigned to the action;
- ▶ cost for natural persons working under a direct contract with the beneficiary other than an employment contract;
- ▶ costs of "beneficiaries that are natural persons" not receiving a salary.

To calculate the personal costs, beneficiaries committed themselves to choose the option and respect the relative instruction foreseen in the GA. In principle, the same option must be applied to all personnel working for the beneficiary in H2020 actions.

The number of actual hours declared for a person must be identifiable and verifiable, excepted the personnel exclusively dedicated to an action. For this reason, members from partner organizations have to fill in the timesheet.

2.2.3 Travel costs

This budget category covers the travel costs and related subsistence allowances (including all related duties, taxes and charges that the beneficiary has paid, if including them is part of the usual practices for travel, e.g. non-deductible VAT) spent for the action.

As best practice, beneficiaries may contact the Commission/ Agency to ask whether a particularly expensive travel plan would be accepted or not. There are no differences between travelling in or outside Europe.

Travel and subsistence costs may relate to the personnel of the beneficiaries as well as to external experts that participate in the action on an ad hoc basis (e.g. attending specific meetings), if the experts' participation is envisaged

in Annex 1 to the Grant Agreement. In this case, the beneficiary may reimburse the experts or handle the travel arrangements itself (and be invoiced directly).

Members from partner organizations who need to travel due to activities related to the project (e.g. project meetings, conferences, workshops) must keep all the receipts unless their institution works with a flat rate.

Travel and subsistence costs must be declared as actual costs (Article 5.2(d) of the Grant Agreement).

The costs must comply with the following conditions for eligibility:

- ▶ fulfill the general conditions for actual costs to be eligible (i.e. incurred during the action duration, necessary, linked to the action, etc.; see Article 6.1(a) of the Grant Agreement);
- ▶ the travel for which costs are claimed must be necessary for the action (e.g. to present a paper explaining the results of a conference);
- ▶ travel costs related to an event at which the beneficiary carried out work that was not specifically related to the action are NOT eligible;
- ▶ all travel costs must be limited to the needs of the action; costs related to extensions (for other professional or private reasons) are NOT eligible;
- ▶ moreover, they must be adequately recorded and be in line with the beneficiary's usual practice on travel.

Of the other direct costs 58.50% (165.500 €) are allocated to travel expenses. This includes mainly 7 project meetings and 3 Review Meetings in Brussels with 2 participants estimated per partner at the project meetings and 1 at the review meetings, exception made for the UNITN that as partner in charge of the project management will insure travel of the PC, PL, and PAM (Project Coordinator, Project Leader, and Project Administrative Manager) to the review meetings and to at least 1 project meeting per year (previous the preparation of the end of the year interim report). Travel costs also include, the four PIE News Design Workshop trips, for the pilot partners, the design/technical partners, and the dissemination leader. Moreover, 4 scientific and/or dissemination events have been considered for one person for each research partner (UNITN, CN, M-ITI, DYNE, AU).

2.2.4 Equipment costs

This budget category covers the depreciation costs of equipment, infrastructure or other assets used for the action.

The costs must comply with the following conditions for eligibility:

- ▶ fulfill the general conditions for actual costs to be eligible (i.e. incurred during the action duration, necessary, linked to the action, recorded in the beneficiary's accounts, etc.; see Article 6.1(a) of the

Grant Agreement) In particular, the best-value-for-money principle must be respect for all the purchases related the project;

- ▶ have been purchased in accordance with Article 10.1.1 of the Grant Agreement;
- ▶ be written off in accordance with the beneficiary's usual accounting practices and with international accounting standards.

The depreciation costs must be calculated for each reporting period and proportionally for the time and the % of use specifically for the project (timesheet of the machine is required if not 100% use for the project).

CN foresees the need of hardware for the development and deployment of the PIE News Platform, for the total estimated cost of €5.000, and specifically:

- ▶ Servers for the development, testing and deployment of the platform;
- ▶ Smartphones for development and testing of the mobile version of the platform.

2.2.5 Other goods and services

This budget category covers the costs for goods and services that were purchased for the action (or contributed in-kind against payment), including:

- ▶ costs for consumables and supplies (e.g. raw materials etc.),
- ▶ dissemination costs (including open access during the action, e.g. article processing or equivalent charges),
- ▶ costs related to data maintenance or storage and conference fees for presenting project-related research,
- ▶ costs related to intellectual property rights (including costs to protect the results or royalties paid for access rights needed to implement the action),
- ▶ costs for certificates on financial statements and certificates on methodology (unless unnecessary, for instance because the EU or Euratom contribution is below the threshold of Article 20.4) or the certificate was submitted not for the final report but before),
- ▶ translation costs (if translation is necessary for the action's implementation, is justified, etc.).

Of the other direct costs, 21.42% (€60.000) is devoted to creating the conditions for the PIE News dissemination and sustainability through the open calls for the PIE News Networking Events (€40.000 distributed among the pilot partners) and through the back-up given to the digital currency (€20.000 in the coordinator budget) in order to let people travel to reach the networking events.

2.2.6 Ineligible costs

The subsequent costs are never eligible:

- ▶ Currency exchange rate losses,
- ▶ Deductible VAT (nondeductible / non identifiable VAT is eligible),
- ▶ Bank costs charged by the beneficiary's bank for transfers from the commission,
- ▶ Excessive or reckless expenditure,
- ▶ Interests owed,
- ▶ Debt and service charges,
- ▶ Provisions for future losses or debts,
- ▶ Costs related to return on capital,
- ▶ Costs declared under another EU Grant.

2.2.7 Obligation

In compliance with the Grant Agreement, PIE News respects the general obligation to inform (art. 17 of the Grant Agreement), as cited below:

- ▶ *Art. 17.1 of the Grant Agreement: General obligation to provide information upon request: the beneficiaries must provide – during implementation of the action or afterwards and in accordance with Article 41.2 – any information requested in order to verify eligibility of the costs, proper implementation of the action and compliance with any other obligation under the Agreement.*
- ▶ *Art. 17.2 of the Grant Agreement: Obligation to keep information up to date and to inform about events and circumstances likely to affect the Agreement*
Each beneficiary must keep information stored in the 'Beneficiary Register' (via the electronic exchange system; see Article 52) up to date, in particular, its name, address, legal representatives, legal form and organization

type. Each beneficiary must immediately inform the coordinator – which must immediately inform the [Commission][Agency] and the other beneficiaries – of any of the following:

- *events which are likely to affect significantly or delay the implementation of the action or the EU's financial interests, in particular:*
 - *changes in its legal, financial, technical, organizational or ownership situation or those of its linked third parties and*
 - *changes in the name, address, legal form, organization type of its linked third parties;*
- *circumstances affecting:*
 - *the decision to award the grant or*
 - *compliance with requirements under the Agreement.*
 - *17.3 of the Grant Agreement: Consequences of non-compliance. If a beneficiary breaches any of its obligations under this Article, the grant may be reduced (see Article 43).*

In compliance with the Grant Agreement, art. 18, the beneficiaries must – for a period of 5 years after the payment of the balance – keep records and other supporting documentation in order to prove the proper implementation of the action and the costs they declare as eligible. They must make them available upon request (see Article 17) or in the context of checks, reviews, audits or investigations (see Article 22). The beneficiaries must keep records and other supporting documentation on scientific and technical implementation of the action in line with the accepted standards in the respective field. The beneficiaries must keep the records and documentation supporting the costs declared. The European Commission has three (3) years to ask for and control documents as well as technical and financial access. Each partner will keep and archive all the financial, administrative and technical documents.



Fig. 09



3. CHAPTER: COORDINATION AND COMMUNICATION PROTOCOLS

Fig. 10

In order to ensure that communication flows at all levels and each PIE News team member is reached, PIE News adopts the following communication protocols. They concern internal communication, dissemination and PIE News specific communication actions.

3.1 COORDINATION AND INTERNAL COMMUNICATION

In order to ensure an effective internal coordination, meetings take place both at the General Assembly and Work Packages levels. General Assembly meetings take place every six months with a face-to-face modality, and every three weeks in remote. Work Package meetings take place once a month, they are organized by WP leaders and adopt only an in-remote modality. Adobe Connect has been selected as the communication medium, as it allows more than 10 participants simultaneously.

The Odoo open source project management system will be used and managed by Dyne. This tool facilitates the organization of sub-groups and their internal communication: each WP leader can open a #channel to communicate with members of task-specific teams (just like a mailing list), and can create such teams thanks to a Kanban board of to-do, doing, or done tasks, so that all tasks subscribers receive email on updates.

There is also a general mailing list for internal dissemination (pienews@lists.dyne.org).

In order to simplify the internal dissemination and revision of documents, the team project adopts Google Drive as repository and for cooperative document drafting.

3.2 DISSEMINATION

Dissemination includes:

- ▶ A PIE News Final Event (M35), an important project's milestones offering direct interactions between experts, key stakeholders in the field, civil society

(students, individuals, grassroots organizations), and PIE News users;

- ▶ Several PIE News Networking Events that will gather users and stakeholders to promote interaction between all interested parties, thereby strengthening networks and amplifying the network effect, and to present them (preliminary) results and collect their feedback;
- ▶ A living, constantly updated calendar ("PIE News – Events of interest") of relevant events (EU formal meetings, cross-cutting topical workshops, training events, etc.). The consortium will foresee the participation in panel discussions, formal presentations and side-event workshops in the most notable events. M-ITI is responsible for scheduling interesting events, but each partner is required to identify at least 2-3 events along the course of the project;
- ▶ Publications for peer-reviewed journals, research conferences, and specialized magazines concerning key findings to disseminate (at least 3 publications at M18; at least 6 at M36). In addition, project's partners can contribute to e-Journals, blogs and newsletters targeting a larger public (at least 1 per year per partner = 8 at M12, 16 at M24, 24 at M36). CN sends a monthly reminder about publications on journals, blogs and newsletter, conferences and workshops, as well as project deliverables, video and pictures. PIE News members who want to submit a paper (or abstract) at conferences or for publications, must ask for permission from all other partners at least 10 days before the last date available to withdraw a publication;
- ▶ Project public deliverables, containing a detailed description of the project's findings (and their wider societal implications). Once submitted to the EC, they will be published online on PIE News website – devoted section, named "Library" or "Publications" or other label – by the responsible partners;
- ▶ The PIE News consortium agrees to write a Wikipedia page on Commonfare during the project.

The Mid-term Dissemination, Exploitation and Communication Report (D5.2 – M18) will report on the conducted activities and foresee the last ones concerning dissemination and public engagement (that is, dissemination to non-academics). M-ITI will share draft plans, especially for public engagement, for the second half of the project. The PIE News research team will handle the language issue in relation to other manifold lines of internal division of the so-called “general public”. For example, in the Netherlands a user group is that of migrants, so the language issue is exploding.

3.3 COMMUNICATION PLAN

The communication actions mainly focus on the promotion of PIE News objectives, activities and findings, with the notable challenge of efficiently converting research and innovation into a clear and easily understood narrative. This section introduces the PIE News Communication Plan (CoP). To reach its goals, PIE News uses a series of communication tools and channels described below.

As first, PIE News adopts standardized Visual Identity Guidelines provided by Daniela Paes Leao from SF (VIG – Appendix A). VIG concern the Logo, the colors palette, the typography, the currency logo, the Creative Commons licensing logo, the illustrations, the management of pictures, and printing supports. The aim is to create an easily recognizable “brand” that improves the project visibility, through a strong visual identity. The PIE News project looks bright, minimalistic, and polished, it sounds straightforward, confident, and smart, and it is approachable, pro-user and funny. SF has shared the templates for deliverables, slide presentations, and reports, as well as factsheets, infographics, and newsletters (see below). As foreseen in the GA (art. 38.1.2), all the templates display the EU emblem and include the required information about EU funding within H2020 (including the GA number).

PIE News releases a Factsheet in English to promote PIE News key concepts and messages; the factsheets are complemented by 6 Infographics released every 6 months and distributed on the web.

Printed copies will be limited to the dissemination of information in external events where online promotion is neither possible nor sufficient. In order to accomplish this goal and limit printing costs, the PIE News research team

will carefully plan printing in collaboration with the writer and the designer. Special attention will be paid to layout in order to avoid mistakes and subsequent corrections. It is recommended to share with other team members the first version of the printed document, so that corrections are possible before the final printing.

Posters and stickers will be used at events that the PIE News consortium will organize or contribute to. Posters will be laminated in order to make them reusable and limit the number of printed copies.

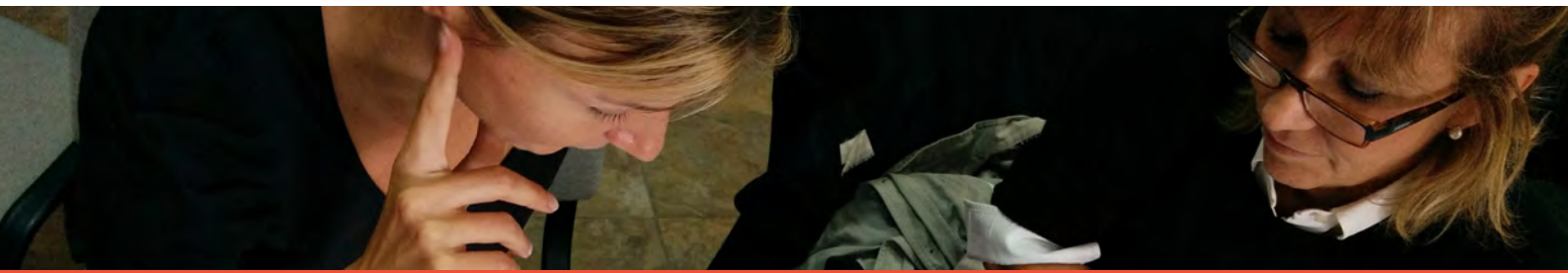
The promotional brochure, (in English, Italian, Dutch, and Croatian), is shared online and has been printed and distributed to partners (pilots in particular). Updated versions of the brochure will be released at M15 to promote the platform features and at M35 to present the project’s final outcomes.

The PIE News hashtag is #pienews. The PIE News team starts with the first formal tweet, but uses the hashtag later on, when some users that will populate it will be engaged. The PIE News platform has its own Facebook page and YouTube account, but not a Twitter account. Research team members follow each other using the hashtag #pienews. The hashtag performance will be tracked with a professional tool (hashtagify).

For what concerns Newsletters (see template in VIG – Appendix A), one letter is sent every three months. The platform and the newsletter are connected. The PIE News adopts MailChimp as newsletter tool; in order to collect contacts from all pilots (users, stakeholders, etc.), they will be invited to register to the newsletter mailing list.

For what concerns the language issues, the PIE News consortium opts for English. In Facebook, as well as the platform, messages need to be spread in other languages. Local “allies” organizations will be identified to have them sharing messages and maybe translating them. M-ITI will try to leverage on existing networks of subtitles translators for TV series, etc.

Finally, with respect to the other communication activities expected to have a major media impact, the PIE News project team will previously inform the Commission as foreseen by the GA (art. 38.1.1).



4. CHAPTER: QUALITY ASSURANCE

Fig. 11

PIE News ensures the quality of the project, as well as related activities and documents, especially through four actions:

- ▶ The monitoring of the correctness of each activity in compliance with the procedures defined by GA;
- ▶ The monitoring of the quality of deliverables and the compliance with the deadlines of deliverables;
- ▶ The monitoring of the quality of the final product (the platform), according to Ethical issues and Data Management Plan (see chap. 5 and 6);
- ▶ The monitoring of possible risks and the immediate implementation of corrective actions (see sect. 1.3).

Overall, these four actions define the Work Progress Evaluation and the Quality Assurance.

4.1 WORK PROGRESS EVALUATION AND QUALITY ASSURANCE

Work Progress Evaluation and Quality Assurance will be performed, at first, at the level of WP coordination/ leadership, and then at the GA level under the particular supervision of the PL and the RIC. The same goes for deliverables (production process and quality assurance inspection and review).

If any deviation or delay from the original project occurs, it is highly recommended to inform the European Commission immediately.

The methodology for ensuring Quality Assurance, adopted in accordance with quality management requirements, is based on a three-level evaluating structure:

- ▶ The present Project Handbook, containing the criteria

to be followed in evaluating and possibly redirecting the project development; including as well measurable progress indicators with respect to the stated goals of the project;

- ▶ Internal peer review for each document delivered;
- ▶ Quality Assurance Plan containing procedures for the following issues:
 - specific document contents and reviews: as for deliverables, the content of each document is agreed upon during internal meetings and internally evaluated;
 - software testing and version control: CN is responsible for the development of software; each time CN releases a new version of the PIE News platform, the version is tested and M-ITI together with UNITN are responsible for a general evaluation;
 - problem reporting and corrective actions; internal communication enhances mutual evaluation, support and monitoring every time a problem occurs; UNITN promotes corrective actions;
 - tools, techniques and methodologies: the RIC and PL together supervise the quality of inquiry tools and methodological issues, on the basis of tasks assigned to each task leader;
 - documentation procedures: the PL and the RIC together are responsible for the production of deliverables, minutes of meetings and PIE News Design Workshops internal reports; each document is internally peer-reviewed.

Quality assurance implies also that the PIE News team reaches milestones (Table 3).

MILESTONE NUMBER	MILESTONE NAME	ESTIMATED DATE	MEANS OF VERIFICATION
MS1	Project Visual Identity and Introduction to the Public	M02	Logo and Material Ready, First PIE News Design Workshop

MS2	PIE News Design Workshop Internal Report I	M03	Report ready and shared with the consortium
MS3	Quality Assurance	M03	Project Handbook available
MS4	Project Website	M05	Availability
MS5	PIE News Design Workshop Internal Report II	M07	Report ready and shared with the consortium
MS6	PIE News Platform Release I	M08	Availability first version
MS7	PIE News Design Workshop Internal Report III	M13	Report ready and shared with the consortium
MS8	PIE News Platform Release II	M15	Availability second version
MS9	Identification of the subcontractors for the PIE News networking events	M15	Identification of the subcontractors for networking events thanks to the networks of the pilot partners and accordingly to a best-value-for-money principle.
MS10	Risk Detection Internal Report I	M18	Availability
MS11	PIE News Design Workshop Report IV	M21	Report ready and shared with the consortium
MS12	PIE News Platform Release III	M22	Availability third version
MS13	PIE News Platform Release IV	M30	Availability fourth version
MS14	Risk Detection Internal Report II	M30	Availability
MS15	PIE News Platform Release Final	M36	Availability final version
MS16	PIE News Final Event	M35	Occurrence

Table 3 List of Milestones

4.2 DELIVERABLE PRODUCTION PROCESS

UNITN will send a monthly reminder about project deliverable deadlines.

The deliverables that must be produced are listed in Annex 1, section 1.3.2 of the Grant Agreement.

Each WP leader submits the deliverables for which s/he is responsible to two appropriate experts, chosen internally to another partner organization not involved in writing the same deliverable, if not in the same WP, so as to check for the quality and compliance of the deliverables and possibly suggest modifications.

Work package leaders (WPL) firstly reviews the deliverables. Then a peer review internal procedures is needed. Internal peer review is performed by two persons for each deliverable. A list of deliverables with “reviewers” column aside has been shared and partners can self-candidate for reviewing one or more specific deliverable. The RIC, according to a proposal made by the WPL, designates the peer reviewers. UNITN also shares a schedule of deadlines so that changes can be made in advance, hence avoiding delays.

The table of contents and draft of the deliverable must circulate for internal review, respectively, one month and two weeks before the deadline.

Reviewers have 3 days for sending the review, so that there is time for revisions. The partner who contributes to the

deliverable will deliver them and be in communication with the peer reviewers in order to improve the quality of the deliverable.

Example. Deliverable D1.2 must be delivered at month 6 (December 2016). The table of contents must circulate at the end of month 5 (November 2016) and the draft by December 15th, 2016 at the latest. Reviewers are expected to circulate the reviewed draft by December 18th, 2016.

If there is the need to change the aforementioned rule, it is necessary to give notice the GA coordinator by sending a message to the mailing list and the issue will be insert in the agenda of the next meeting. Should the meeting be far away in time, another solution shall be selected.

The RIC or the partner who contributes to a deliverable may seek independent advice as to the content or quality of a deliverable, if the RIC, PC and PL consider such action necessary or desirable, or for the purpose of resolving any lack of consensus among the project partners.

The PC must submit the deliverables, in accordance with the timing and conditions set out, via the Participant Portal. Each WP leader is responsible to send the final version to the PC in due time.

The quality and content of deliverables (e.g., research reports, recommendations, software, etc.) remain however on the responsibility of the partner(s) who contribute to them.

4.3 OTHER DOCUMENTS PRODUCTION PROCESS

In compliance with the European Commission's decision, there are two Technical and Financial Reporting Periods: RP1 (M1-M18) and RP2 (M19-M36). The PC has to upload reports to the participant portal within 60 days from the end of the period. At the end of the project, an audit has to be organized.

During the internal face-to-face meetings, the PIE News members participating have to keep attendants list with signature of each participants and the minutes of the meeting, and more generally they have to keep track, detailed minutes and detailed documents related to any action (meetings, conferences, workshops). UNITN is responsible for compliance with the above and archiving of documents. Minutes are instead responsibility of the host partner organization of each meeting.



Fig. 12



Fig. 13



Fig. 14



Fig. 15



Fig. 16



Fig. 17

5. CHAPTER: ETHICS

The PIE News practice will always abide to the principle of informed consent and to the ethical annex (Annex 1 to the Grant Agreement). Furthermore, the actions and operations of the researchers will always comply with the national legislation and with the internal regulations of the partners involved in the project. In particular, Regulation (EU) 2016/679 of the European Parliament and of the Council of 27 April 2016 on the protection of natural persons with regard to the processing of personal data and on the free movement of such data, and repealing Directive 95/46/EC (General Data Protection Regulation) will be strictly followed by the project security model. For what concerns the Dutch and Croatian cases, detailed information will be provided in the Data Management Plan that will be updated at M6 (Deliverable D.1.2). The specific goal of this chapter is to present and discuss the issues related to the treatment of the collected data in electronic form, their storage on different media (Hard Disks, Storage Units, CD/DVD/SD/USB peripherals), and their distribution using network connections.

5.1 GENERAL PRINCIPLES

The privacy protection and operational model of PIE News rests on three pillars:

- ▶ Data anonymity and confidentiality,
- ▶ Informed consent;
- ▶ Circulation of the information limited to the minimum required for processing and preparing the anonymous open data sets.

Anonymity and confidentiality will be guaranteed whenever possible. The only exemption can be in some cases for the researcher directly interacting with a group of participants (e.g. focus group). When data must be presented in non-aggregate ways for research purposes, the data will be anonymized following the best practices of pseudonyms applied to all personal information. Furthermore, provisions will be taken to avoid the possibility of information linkage.

The informed consent policy requires that each participant will provide his/her informed consent prior to the start of any activity involving him/her. Appendix B reports a template of the informed consent form that will be completed by participants involved in interviews/workshops/focus groups. Public distribution of elements of information that can reveal the identity of the users (e.g., videos or pictures) for scientific dissemination purposes will be explicitly authorized by the participant as part of this process.

To achieve a limited circulation of the information, the database containing in anonymous form the data collected from the users will be distributed to the partners, if needed at all, through protected and encrypted Internet connections; the raw data will only be shared if it is required for the development. The researchers will never pass on or publish the data without first protecting participants' identities. No irrelevant information will be collected; at all times, the gathering of private information will follow the principle of proportionality by which only the information strictly required to achieve the project objectives will be collected. In all cases, the right of data cancellation will allow all users to request the removal of their data from the project repository at any time.

The final datasets fully anonymized will be published as Open Data as described in Sect. 6.1.3.

5.2 SECURITY FRAMEWORK

In order to accomplish the creation of a security framework it is essential to focus on the issues of access and identity authentication, authorization and auditing. Therefore, PIE News' objective is to develop a base security system that standardizes the processes of Authentication, Authorization and Auditing of the various information sources involved.

5.2.1 Authentication

The Data Protection Act requires that any operator who is granted access to sensitive data must be authenticated. Authentication technology should be strict when dealing with sensitive and confidential data available to the users of

the platform. To do this, a username and a password will be used so that the person who wants to access the raw data of surveys and interviews confirms that he has authorized access to the system. If deemed necessary by sensitive collected data we will use an RSA encryption mechanism, with each operator receiving a personal private key.

5.2.2 Accounting and auditing

Logging of the personal data will be enforced to prevent abuses, and in case of necessity proper auditing measures as provided by the Data Protection Act shall be put in action.

5.3 SUMMARY OF TECHNOLOGICAL SOLUTIONS

Table 4 lists and describes the main technological solutions used for the different security issues.

GOAL	TECHNOLOGICAL SOLUTION
Guaranteeing complete anonymity where required	The collected data will be labeled with participant pseudonyms. Participant consent forms will be held separately and will not reference the participant code. These will be paper based and held in a locked filing cabinet on the researchers site. The file linking participants' names as they appear in the consent forms with the respective pseudonym will be password protected and encrypted so that access will be restricted to only those with the requisite code. Should confidentiality and/or anonymity be under threat, the file will be destroyed (a printed copy will be generated before file destruction and securely kept in the researcher's safe box).
Safe keeping of the documentation on informed consent	The informed consent will be provided by the interested subject by filling an appropriate form as reported in Appendix B. The authorized personnel must keep this physical document under lock and key. Information on the interested person can also be stored in electronic form in a database or in a spreadsheet. The spreadsheet or the database will be encrypted and its access will be password-protected and granted only to authorized operators.
Remote access	In the general case, the "raw" data related to the participant to the project, will be handled only by the research team involved in the WPs that involves research activities with the participants and made available to the rest of the consortium only in anonymous form. In particular, any personal data contained in the collected data will be handled only by the researchers interacting with the participant. If, for special cases, some other researchers should need to access to the "raw" data, the interested participants will be informed. Only after their consent is extended to the requiring researcher, s/he can have access to the data. In this case, if the access is remote, the system has to have the following researchers in the consortium can have access through an internet SSL connection.

Table 4 Technological Solutions

5.4 DESCRIPTION OF PROCEDURES

Research actions deal with four "PIE News Design Workshops" that provide the occasions to converge partners' work at the pilot-sites level and planning group's work into the definition of procedures for data collection, data archiving, and data analysis. The procedures are described in detail in this section, based on the ethical requirements that Ethical Committees (University of Trento, Abertay University) have already approved as the minimum requirement for participants' data protection.

The four "PIE News Workshops" will gradually deepen several planning levels: 1) basic architecture and information about welfare state; 2) advanced features for storytelling distribution; 3) digital currency and reputation system planning; 4) advanced features for collaborative economy. Whereas the details of this initiative will be definable only during the "PIE News Design Workshops", in compliance with the open approach evaluated by European Union, it is anyway possible to already outline the basic elements of the procedure for data collection that will be implemented within the consortium. It has to be considered that UNITN

will collect directly few data, whereas pilot partners (BIN Italy, Center for Peace Studies, Stitching Staff) will carry out the major part of data collection. Especially, three data collection techniques are necessary: 1) in-depth interview; 2) focus group; 3) workshop. Whereas in-depth interviews and focus groups aim at collecting narratives (individual or collective) about discussed topics, workshops instead are collective meetings characterized by the production of artefacts, as drawings, maps, lists, and paper-pattern of interfaces, and the like.

For what concerns interviews and focus groups, the focus is on life narratives, everyday practices to handle primary needs (e.g. household, nutrition, travel, etc.) and concepts of the future that may improve participants' life conditions. For what concerns workshops, the focus is on information about primary needs handling and the way digital technologies may improve participants' life conditions, with reference to planning details, represented through collectively produced artefacts.

5.4.1 Contacting procedure

Potential participants will be selected and contacted with the support of “allies” civil society organizations from the three pilot sites, especially partner organizations and organizations that contributed to the project proposal. Each organization will be contacted in advance by partners and informed about both research aims and activities procedures through a presentation letter; if they confirm their availability, they will support the research team in identifying subjects in relation to research needs. It is necessary to underline that some subjects may participate in more than one activity, such as two or three workshops. Despite this possibility, the consortium will try to broaden the group of participants, hence limiting their involvement as much as possible.

Each potential participant will receive an informative letter (Information Sheet – Appendix C) providing an overall description of the PIE News project and the activities they will be involved in. Participants will be able to request a refund for any cost they will have to afford to participate (e.g. travel costs) upon receipts of payment delivering (e.g. bus ticket). Partners organizing activities with participants can provide them with food and refreshments.

5.4.2 Research site

In-depth individual interviews will take place either at participants' places or at the head offices of partner/supporting organizations upon agreement between researchers and participants. The purpose of this negotiation is to understand which option is more suitable for participants who will lead the choice of sites. Interviews will be conducted by the staff from partner organizations with expertise in human and social sciences and previous experience in conducting interviews.

For what concerns focus groups and workshops, they will take place either at the head offices of organizations already involved in the project, both as partners and support, or at the head offices of new organizations that may declare interest in planning activities as they proceed. In any case, an exhaustive informative letter will inform in advance potential participants about the aims of focus group or workshop. The staff who will conduct focus groups and workshops belongs to partner organizations and has expertise in human and social sciences and previous experience in research activities.

In any case, the person who will conduct the interview/focus group/workshop will be at participants' disposal, until activities ends, for any doubts and other aspects related to meetings and the overall project.

5.4.3 Data collection

Before conducting each interview/focus group/workshop, the researcher has the task of ensuring that each participant has understood the purpose of the meeting and the procedures for data archiving. The researcher will fill in with each participant the requested form (Appendix B). Before the audio-recording starts or pictures of artefacts

are taken, the researcher will ensure that the related authorization by participants is collected.

During meetings, the researcher may collect notes relevant for the planning process.

5.4.4 Activities implementation

In order to guarantee the correct implementation of activities, the compulsory steps are summarized below.

Initially, potential participants will be informed about the purposes of the PIE News project and the aim of the meeting they are invited to participate in. In agreement with each participant and according to their preferences, date and site are defined. In the case of collective meetings, like focus groups and workshops, date and site may be defined a priori and constitute a piece of information given during the first contact.

The meetings will take place at the site, on the day, and at the time agreed.

The researcher offers an overall introduction about the aim of the study and about personal data treatment; s/he will ensure that participants clearly understand details about the project and especially the required forms. During the meeting, the researcher will give an overview of what is expected from the participants. Furthermore, it will be restated the possibility to interrupt participation at any time without providing explanation.

Participants are invited to fill in the required forms; the researcher is at their disposal to complete the form and s/he has to ensure that each information has been clearly understood. When the procedure is completed, the researcher explains in details the implementation of the meeting and s/he has to ensure that participants clearly understand.

At this moment, the researcher is responsible for the beginning and the ending of the interview/focus group/workshop.

5.5 PARTICIPANTS

Subjects who will take part in the study are adults (over 18 years old and able to give their consent): they are Italian, or Croatian, or Dutch speakers depending on the pilot site they live in. For this reason, documents, forms, and explications will be translated and adapted to national peculiarities, in order to ensure among participants a complete and conscious evaluation of their involvement.

To ensure a free and conscious participation in the study, it will be clarified to participants that their involvement is independent from their link to the organizations involved in the study, hence any refusal will not affect their link to organizations and the support offered.

The group of participants consists of approximately 240 subjects, at least 80 from each pilot site (Italy, Croatia, the Netherlands). They will be “new poor” as defined in the

project proposal: precarious workers, working poor, NEETs, people who no longer qualify for social safety nets or welfare state provisions. Being participation voluntary, people who will not be able to voluntarily confirm their consensus will be excluded. For what concerns supporting organizations, the delegated staff will provide in advance the necessary information to select subjects who are suitable for the study. Furthermore, the consortium has a propensity for including in the study new subjects not previously selected who voluntarily states their intention to participate.

5.6 RISK MANAGEMENT

Data collection techniques are in-depth interviews, focus groups, workshops, audio- and video-recordings, and photographing. These techniques do not concern psychophysical data.

As these techniques do not involve risky and stressful activities and participants will comfortably sit, any negative consequence or reaction is expected. In relation to this aspect, the only insurance for civil liability is provided by University of Trento.

Participants will not gain direct benefits; however, the project aims at the improvement of their life conditions by supporting their ability to daily handle primary needs and to build networks.

5.7 INFORMATION AND CONSENT

The Informed Consent Form constitutes Appendix B.

The participation of people who are not able to freely and voluntarily confirm their intention is excluded. To ensure participants' understanding about the project and its activities, the purpose of the study is clearly stated before the beginning of the data collection process.

However, if participants require more information and details, a researcher will be at their disposal during the meetings to answer questions and clarify doubts, also providing examples and clarifications. Each team member is expert and competent.

Before activities start, participants will have time enough for understanding. Before obtaining the consent to participation, participants will be informed about the staff at their disposal for further information and notices during the study; names, qualifications and contact details are provided. Researchers responsible for interviews, focus groups and workshops provide any information included in the Information Letter and in the Informed Consensus Form.

5.8 ANONIMITY AND CONFIDENTIALITY OF PERSONAL DATA

The Consortium will adopt the best approach to protect participants' personal data. The documentation conforms

to European regulation and to the national ones.

Participants will be informed about the treatment of personal data before the beginning of activities. Participants' anonymity and confidentiality will be fully guaranteed with respect to all the research activities carried out and data gathered. Anonymization will take place through pseudonymization, generalization, and any other reasonably employable mean. In particular, from data analysis onwards, participants' names will be replaced by pseudonyms (unless they explicitly ask that their names be reported).

Personal information and details will be never released in forms that might make participants identifiable to any extent. To this aim, even upon request for identity disclosure by any individual participant, the researcher will assess whether this might prejudice the anonymity of other subjects, and will decline the request in such a case. On the other hand, the choice concerning the disclosure or anonymization of the names of the involved organizations, both private and public bodies, will be discussed directly with the institutional and organizational participants of each case study. The researcher, anyway, will explicitly remind individual and collective participants of the consequences that may follow from the publication of the research data and outcomes, and what identity disclosure might imply for them.

Personal data will be protected by passwords and archived at University of Trento or other partner organizations, into a secure repository. Any data, even transcriptions, will have anonymous form and they will be managed in compliance with the regulation about sensitive information. Only after the process of anonymization, data can be shared with other partner organizations, through protected and encrypted Internet connections.

Information that might enable data to be linked to individuals, such as the file linking participants' names (as they appear in the signed Informed Consent Forms) to their respective pseudonym, will be password protected and encrypted so that access will be restricted to only those with the requisite code. Should confidentiality and/or anonymity be under threat, the above mentioned file will be destroyed (a printed copy will be generated before file destruction and securely kept in the researcher's safe box).

5.9 ARCHIVING AND SECURITY OF COLLECTED DATA AND RESEARCH RESULTS

Fieldnotes, photos, audio- and video- recordings, and transcriptions will be kept with appropriate security precautions and accessibility controls. Data storage and protection will be enabled by the use of protected and secured data archives within the partner institutions.

Authorized researchers from partner organizations, from the PIE News Internal Ethical Board (see next section: 5.10), from the Ethical Committee of the University of Trento, and from the competent Authority will access collected data and

research results, even if at an intermediary stage.

The above mentioned institutions will archive data until the end of the project in compliance with the national regulations of each Member State involved in the project. Data are archived on secure PC protected by password at the head offices of partner organizations. The Technical Coordinator (from CN) will archive a copy after the positive approval of procedures of the Ethical Committee.

5.10 INTERNAL ETHICAL BOARD

In order to ensure that ethical principles are met, an Internal Ethical Board has been established. It is composed of eight persons, one from each partner organization, but a person not directly involved in the project. The Board will have a meeting (even in remote) once per year. The Board will read ethical deliverables, make some suggestions, and answer ethical questions that may emerge along the process.

Members of the Board:

► UNITN: Attila Bruni

Attila Bruni is Associate Professor at the Department of Sociology and Social Research of the Trento University, where he teaches Organizations and territory management. His research interests regard particularly the study of work and organizing practices, technological phenomena, the construction of gender in the workplace, qualitative methodologies, phenomenological and interactionist sociology. He was research responsible of the project AETAS - Active aging, Empowerment, Tecnologia, Salute (2012-2014). He has been President of the Italian Association for Social Studies of Science and Technology (STS-Italia, 2010-2012), and member of the board of the European Association for Studies of Science and Technology (2011-2014). He is founding member of the Editorial Board of the journal *Tecnoscienza. Italian Journal of Science and Technology Studies*.

Contact: attila.bruni@unitn.it

► M-ITI: Mónica da Silva Cameirão

Mónica is an Invited Assistant Professor and researcher at the University of Madeira (UMa) and the Madeira Interactive Technologies Institute (M-ITI). She is currently the Portuguese coordinator of the Professional Masters on Human-Computer Interaction program that UMa/Madeira-ITI offers in conjunction with Carnegie Mellon University in Pittsburgh, USA. In the past she worked as research assistant at the SPECS Laboratory of the Universitat Pompeu Fabra and at the Institute of Neuroinformatics, ETH-Zürich, Switzerland; and was visiting scholar at the Quality of Life Technologies center of Carnegie Mellon University.

Since Mónica arrived in Madeira in 2011, she has been co-principal investigator and co-founder of the NeuroRehabLab Research Group, a research group created in the context of the Madeira-ITI with over 15 members, including PhD students, technicians, MSc students and other faculty members. The NeuroRehabLab is an interdisciplinary

research group that investigates at the intersection of technology, neuroscience and clinical practice to find novel solutions to increase the quality of life of those with special needs.

In recent years, Mónica has been involved in the development and clinical assessment of virtual reality technologies for stroke rehabilitation and her work gave rise to a number of high impact publications in journals such as *Stroke*, *Restorative Neurology and Neuroscience*, and the *Journal of Neuroengineering and Rehabilitation*. Mónica's work in VR explores specific brain mechanisms that relate to functional recovery to approach motor and cognitive stroke rehabilitation by means of non-invasive and low-cost technologies. Her research addresses aspects such as serious gaming, personalization of training, integrative motor-cognitive tasks, physiological computing or the emotional content of training stimuli. More recently, Mónica also started applying these principles to technology mediated fitness training for the elderly population.

Mónica has been recently awarded the 2016 ISVR Early Career Investigator Award, an award granted by the International Society for Virtual Rehabilitation. The purpose of this award is to recognize and acknowledge outstanding contributions by early career scientists whose research relates to virtual rehabilitation.

Contact: monica.cameirao@m-iti.org

► AU: James Moir

Dr Jim Moir is a senior lecturer in sociology with a research interest in the application of discourse research across a wide range of topics. This has involved the study of discourses of occupational identities; doctor-patient interactions and shared decision-making; the discursive construction of tourism as visual experience; Western discourse surrounding death and dying; discourses on teenage pregnancy; the role of the media in promoting a discourse of opinionation with respect to political issues; higher education discourse related graduate attributes and personal development. He has successfully supervised four postgraduate students (three PhD and one MPhil) as well as examining four PhD students and has also served on the editorial boards of a number of academic journals (e.g. *Enhancing Learning in the Social Sciences*, *The International Journal of Learning* and *The International Journal of Human and Social Sciences*).

Dr Moir has also held a number of grants related to his research on discourse research as well as on teaching and learning in higher education and was one of three Senior Associates within the U.K. for the Higher Education Academy's Centre for Sociology, Anthropology and Politics (C-SAP). More recently he has conducted work as a consultant for the QAA (Scotland) Enhancement Themes.

Areas of MPhil and PhD supervision would be considered in relation to the above themes, and in particular proposals focused on examining the construction of identities in the healthcare professions, the discourse of personalization in higher education, and presentation of politics in the media. http://www.abertay.ac.uk/staff/j_moir_658d0.html

Contact: J.Moir@abertay.ac.uk

► CN: Silvia Gabrielli

Dr. Silvia Gabrielli holds a Master degree in Occupational Psychology and a PhD in Cognitive Sciences from the University of Padova (Italy). Prior to joining CREATE-NET, she was a research scientist at FBK-irst (Trento), HCILab (University of Udine), DIS (University of Rome La Sapienza), Interaction Design Institute Ivrea (Torino) and Interact Lab (University of Sussex, Brighton, UK). Her current research work is focused on the design of persuasive interfaces for healthcare (REHAB@HOME, MONARCA, INTERSTRESS EU FP7 Projects) and for eco-sustainable mobility (SUPERHUB EU FP7 Project). She is also involved in industrial collaborations, as in the case of the Riabiligame project (Legge6) in collaboration with CoRehab (Trento). Since 2008, Silvia is adjunct professor of Human-Computer Interaction at the University of Trento (Faculty of Cognitive Sciences, Interfaces and Communication Technology Program).

Contact: silvia.gabrielli@create-net.org

► SF: Klasien van de Zandschulp

Klasien van de Zandschulp is a senior interaction designer and researcher at Lava Lab, which is part of the Amsterdam-based creative agency Lava Design. She designs the way people interact with, and use, their digital environment by creating usable interfaces and interactions in (public) spaces. She worked for mobile startups like Layar (Blippar), PRSS, Together and design & technology labs like Mediamatic Lab and, currently, Lava Lab. Van de Zandschulp has vast experience in initiating and founding projects including the first virtual festival “Zo niet, dan toch”, the location based audio platform HearUsHere, and gamified silent disco platform DuoDisco. Her latest projects are “iPerform”, that takes you on a physical expedition through the Van Gogh museum and the art education program #GoldenAge, that allows a young museum audience to chat with the 17th Century portraits from the collection of Amsterdam Museum and Rijksmuseum. <http://lava.nl/lavalab/about-lava-lab> - www.klaisen.com

Contact: klaisen@thestafffoundation.org

► DYNE: Federico Bonelli

Bonelli has a degree in Philosophy of Science, is initiator and artistic director of Trasformatario, a research laboratory focusing on methodologies, narratives and practices of sustainable design emerging via site-specific performance.

Artist, Multimedia project expert and director, has 20 years of experience in ideation, production and integration of complex and unconventional media projects. List of relevant projects and activities: www.trasformatario.net - www.dowse.eu - www-fbproductions.eu - www.protoquadro.net.

Contact: fredd@dyne.org

► BIN: Giuseppe Bronzini

Giuseppe Bronzini, magistrate and counselor at the Italian Corte di Cassazione, member of the Scientific Committee of the Fondazione Lelio Basso. Labour law and fundamental rights scholar, Giuseppe conducts research, authors essays, and collaborates with law journals. He is a member of the Osservatorio sul rispetto dei diritti fondamentali in Europa (<http://www.europeanrights.eu/>), and founding member of the Basic Income Network - Italia (<http://www.bin-italia.org/>). Among his publications, *I diritti del popolo mondo* (manifestolibri 2003) and *Reddito di cittadinanza. Una proposta per l'Italia e l'Europa* (Edizioni Gruppo Abele, 2011). With Giuseppe Allegri he wrote *Sogno europeo o incubo?* (Fazi, 2014) and *Libertà e lavoro dopo il Jobs Act* (DeriveApprodi, 2015). The two also edited *Il tempo delle Costituzioni. Dall'Italia all'Europa* (manifestolibri, 2014) and *Ventotene. Un manifesto per il futuro* (manifestolibri, 2014).

Contact: pa.bronzini@tiscali.it

► CMS: Julija Kranjec

Julija Kranjec is in charge of overall coordination of the activities, policy activities, representation, advocacy activities, cooperation with national authorities and NGOs. Julija Kranjec works at the Centre for Peace Studies in Zagreb as an Organisational Coordinator and is a member of Executive Board. Since 2009 mainly has been working on combating racism and xenophobia through education, research, advocacy and lobbying. She has experience of direct work with asylum seekers, refugees and migrants in Croatian society in the area of integration and inclusion to society. She has published articles, reports and analysis of relevant legislation on forced migration and refugees' issues.

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6. CHAPTER: DATA MANAGEMENT PLAN

Fig. 18

This is the first version of the Data Management Plan that will be completed and definitely delivered at M6 as Deliverable D1.2.

PIE News seeks the adoption of proper security and confidentiality standards for the data collected as well as proper Open Access (OA) policies to maximize the impact of the research carried out, as we are well aware that at the heart of contemporary research is an extensive scientific dialogue, with a timely sharing of data and experiences.

Proper data sharing accelerates innovation, allows researchers to build on previous work improving the quality of the results, fosters collaboration and avoids duplication of work. The necessity of Open Access and Open Research Data (ORD) adoption has gained momentum and it is influencing the political choices of all the main public agencies funding and sponsoring research. The commitment of the EC toward Open Access of the research results is reflected in official guidelines [1] and in the wording of Grant Agreement (e.g., art. 29.2). In addition, from the specific nature of PIE News and from its being part of the “societal challenges” programme, we derive a particular emphasis on the involvement of citizens, stakeholders, and civil society organizations. All these considerations require the adoption of liberal standards for the scientific dissemination of information, in accordance with the mandate in Art. 29.2 of the PIE News Grant Agreement.

In order to avoid problems and misunderstandings and to streamline the whole process of data collection and of dissemination of results, this chapter seeks to define clear guidelines on how to treat data and on how to disseminate the results. This chapter is extended following the EC Guidelines [2].

6.1 PIE NEWS OPEN ACCESS POLICY

PIE News is part of the H2020 Open Data Pilot [3], thus the access policy to the project result must deal both with the publications produced by the project and with the data upon which these publications are based. Moreover, given the interdisciplinary approach of the project and its societal

importance, PIE News foresees additional data to support general findings and to build a base for dissemination of the project outcomes, as well as setting the ground to build the advocacy capabilities and support the impact-oriented actions of PIE News.

One of the key challenges for a CAPS research project like PIE News is to produce scientific knowledge that is persistent, that goes beyond the restricted scientific communities and that fosters the benefit of the individuals, of the communities and of the European society at large. Furthermore, having its roots in Internet Science [4, 5] PIE News findings are conceived to foster and benefit the development of Community Networks (CNs) also beyond the European Union.

These ambitious goals require a thorough dissemination activity of the research results, and a careful management of general data, including the information collected, to maximize the impact of the project efforts. For this reason, PIE News has opted for, and included in the Consortium Agreement, a fully open model of results and documents dissemination, including deliverables that are all public.

6.2 OPEN ACCESS TO SCIENTIFIC PUBLICATIONS

One of the cornerstones of our dissemination strategy is to secure a timely and regular publication of the scientific findings in peer-reviewed, high impact journal and conferences. This will ensure a proper consideration of PIE News results in the scientific communities of interest. All scientific publications will be available in Open Access, providing archival Portable Document Format (PDF) versions of the published document. As specified in the H2020 Guidelines on Open Access publishing [1], by this term PIE News means the practice of providing free and unrestricted access to scientific publications to read and download.

According to the contractual obligations specified in the Grant Agreement Art. 29.2,

“Each beneficiary must ensure open access (free of charge online access for any user) to all peer-reviewed scientific publications relating to its results.”

PIE News will obviously comply with this obligation and is implementing a specific policy and best practice based on OpenAIRE 2.2 to ensure and almost automatic propagation of the Open Access version of the publication to repositories compliant with the Open Archives Initiative Protocol for Metadata Harvesting (OAI-PMH) standard [6] and to the web site of the project.

6.2.1 Documents subject to Open Access

The Open Access policy for scientific publications applies whenever a partner of the project or a group of partners decides to produce a scientific publication containing the results of a research activity. This decision is taken on the following grounds:

- ▶ the publication is scientifically relevant and brings forth significant advances in the state of the art of the interested discipline;
- ▶ (if applicable) the data contained in the publications fulfill the requirements specified by the Ethical Requirements (see chapter 5).

It must be noted that, due to the societal and open nature of PIE News research, as provided by the Consortium Agreement in Sect. 8 and in particular in Sect. 8.3.1, PIE News members are not subject to prior notice to the Consortium or any other legal body.

The Open Access policy does not apply to partial results which are produced at intermediate steps of the project and are not deemed scientifically relevant.

6.2.2 Green and Gold Open Access

The H2020 guidelines [1] refer to the two main procedures to enforce Open Access to scientific literature.

The Green Open Access: this procedure is based on re-publishing (often indicated as self-archiving) of the published article or the final peer-reviewed manuscript without the graphical imprints of the commercial publisher. Some journals also allow the deposit of the published version with the publisher imprinting. The manuscript is archived into an OAI-PMH-compliant repository (see sect. 6.1.1.3) by the authors; some publishers could require an embargo period of time before the paper is made concretely available to the public: PIE News will try to minimize both the use of publishers that require an embargo and the duration of the embargo, that will in any case abide to the requirements of the Commission [1] as stated in Art. 29.2 of the Grant Agreement.

The Gold Open Access: the article is provided in Open Access directly by the publisher, which normally (but not always) enables also re-publishing with the same means of the 'green' method. PIE News notes that while some publishers (most notably the International Federation for

Information Processing) maintain a fully open Digital Library (DL) without any fees, many others require a fairly expensive fee to publish in Open Access. Many scientific communities regret and discourage 'pay-to-publish' procedures, especially in mixed publication venues (i.e., journals that allow both traditional and OA publications) where authors must declare their desire to publish in Open Access before the peer-review.

6.2.3 Open Access Repository

A repository for scientific publications is generally defined as an online archive, but this condition is not enough to make a repository Open Access. The most known Open Access repository is probably arXiv (<http://arxiv.org>), maintained by the Cornell University. The H2020 guidelines give full freedom on the choice of the repository: it can be an Institutional Repository or a subject-based centralized repository. If the Institution the authors belong to does not have a specific infrastructure of this kind, the EU is funding the OpenAIRE effort (<http://www.openaire.eu>), which provides APIs to a comprehensive list of public repositories and in general means to foster Open Access policies. OpenAIRE plays a central role in PIE News best practices for Open Access, since it provides means to automatically link the repositories of most institutions, and it can thus be used to provide suitable visibility and linking to all the published material. In particular, the Zenodo (<http://www.zenodo.org/>) repository is strictly related to OpenAIRE, thus providing a suitable means for archival for all European institutions that cannot (or have not yet) set up an institutional repository. Other lists of repositories and further information on Open Access are available at <http://roar.eprints.org> and <http://www.opendoar.org/>.

The PIE News website will also contain a section that will serve as OA repository for project publications.

6.2.4 Accepted version and published version

An accepted paper is a version which has been revised by the author to incorporate review suggestions, and which has been accepted by the publisher for publication.

The final, published version is the reviewed and accepted article, with copy-editing, proofreading and formatting added by the publisher.

6.2.5 Implementation of the Open Access Policy to Publications

The Open Access policy will be applied both to peer-reviewed publications (i.e., publications that are evaluated by “peers”) and to other types of publications such as books, white papers, and all other documents that the consortium deems valuable of dissemination. In the following we refer to the first type of publications as “peer-reviewed (PR)” and to the second as “non-peer-reviewed (NPR)”.

Deliverables will be initially available through the project web site with the very appealing format described in detail (see VIG). After review it will be decided if they deserve dissemination through OAI-PMH compliant repositories (Sect. 6.2.1.3).

6.2.5.1 Procedures for PR publications

The authors of PIE News publication have the freedom to opt for either a Green or for a Gold policy. In case of a Green Open Access policy the procedure is as follows:

- ▶ As soon as the paper is accepted, the draft of the accepted paper is stored in one or more repositories of the authors' choice among those supported by OpenAIRE along with bibliographic metadata;
- ▶ The paper publication is notified to the project coordinator and to the exploitation and dissemination list (pienews@list.dyne.org);
- ▶ Within a few days the manuscript becomes visible automatically through OpenAIRE reporting the proper reference to PIE News;
- ▶ A script parses OpenAIRE daily (or weekly) to retrieve novel manuscripts and upload them automatically on the PIE News web site in the proper section;
- ▶ If requested by the publisher, the paper is left unpublished for the duration of the embargo period; such period cannot exceed 6 months or 1 year in exceptional cases;
- ▶ After the embargo period expires, the Open Access is granted to everyone via the repository.

This procedure guarantees the highest visibility and dissemination as well as consistent and coordinated referencing, linking and availability.

In case of a Gold Open Access policy the procedure is:

- ▶ As soon as the paper is accepted, and according to

the publisher's Open Access policy, the draft of the accepted paper is stored in a repository of the authors' choice among those supported by OpenAIRE along with bibliographic metadata;

- ▶ The paper publication is notified to the project coordinator and to the exploitation and dissemination list (pienews@list.dyne.org);
- ▶ Within a few days the manuscript becomes visible automatically through OpenAIRE reporting the proper reference to PIE News;
- ▶ A script parses OpenAIRE daily (or weekly) to retrieve novel manuscripts and upload them automatically on the PIE News web site in the proper section;
- ▶ After the final publication the authors also add the publisher digital library information to ensure that the gold access policy is correctly advertised and accomplished, the publisher may request a different version to be uploaded.

The costs incurred for publication are eligible for reimbursement as long they are incurred before the end of the project; however, PIE News will try to avoid all venues that apply publication fees that can rise suspicions that the publication does not follow an ethically consistent peer-review process.

If the publication of a work supported by PIE News with a publisher that does not comply with EU rules is deemed by the Management Board of the utmost importance for its dissemination, the PIE News Coordinator will write a formal request to the publisher to comply with EU regulations and/or resort to the allocated budget for Author Processing Charges in order to make the publication immediately open access.



6.2.5.2 Procedures for NPR publications

The researchers in PIE News will publish all NPR under one of the Creative Commons licenses and they will adopt an Open Access policy also for NPR publications such as technical reports and white papers. The procedure is in this case simple and similar to the Gold Open Access case:

- ▶ When a technical report is published (e.g., on an institutional website), the authors store a version of the paper, along with the available metadata, in one or more repositories of her/his choice among those supported by OpenAIRE;
- ▶ The paper publication is notified to the project coordinator and to the exploitation and dissemination list (pienews@list.dyne.org);
- ▶ Within a few days the manuscript becomes visible automatically through OpenAIRE reporting the proper reference to PIE News;
- ▶ A script embedded in the PIE News web-site and compliant with OpenAire APIs, parses OpenAIRE daily (or weekly) to retrieve novel manuscripts and upload them automatically on the PIE News web site in the proper section.

Exception may apply to these rules and procedure for contributions to newspapers and dissemination magazines.

6.2.6 Current Policies by some of the Major Scientific Publishers

Clearly, the choice of whether to take a Green or a Gold Open Access policy is also determined by the specific publisher and by the scientific field. Self-archiving is today compatible with the most important publishers, as far as it is limited to the accepted version of the paper. Details on most publishers and journal policies can be found on the Sherpa Romeo portal (<http://www.sherpa.ac.uk/romeo/index.php>). In the extreme case in which self-archiving is prohibited and commercial open access options are not available, the authors should avoid the journal.

For the authors' convenience and for general reference, we report here the current policy contained in the copyright agreement or on web-pages of some of the most relevant publishers at the moment of writing, though it is strongly recommended to check the single journal OA policy on the Sherpa Romeo database and/or on the journal website. The information in the following sub-sections is mostly taken verbatim from publishers' web pages, thus may contain advertisement-like information and in general the publisher visions, which are not necessarily reflected or agreed-upon by PIE News consortium.

6.2.6.1 Elsevier

The Elsevier policy on authors right can be found in the website <http://www.elsevier.com/about/company-information/policies/sharing>. Elsevier supports Green Open Access, but maintains a number of journals ([\[www.elsevier.com/embargoperiodlist\]\(http://www.elsevier.com/embargoperiodlist\)\) with an embargo policy. Though these journals can be used for PIE News publications, we suggest to avoid those that have and embargo period longer than 12 months. In any case also journals subject to embargo allows pre-prints to be shared in private repositories. Citing from Elsevier's Frequently Asked Questions \(FAQs\) page:](http://</p>
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Q. *Have you removed an author's right to self-archive in their institutional repository?*

A. *No. We have removed the need for an institution to have an agreement with us before any systematic posting can take place in its institutional repository. Authors may share accepted manuscripts immediately on their personal websites and blogs, and they can all immediately self-archive in their institutional repository too. We have added a new permission for repositories to use these accepted manuscripts immediately for internal use and to support private sharing, and after an embargo period passes then manuscripts can be shared publicly as well.*

Regarding the author rights on the accepted versions of the manuscripts of journals not subject to embargo, we find the following wording:

▶ Authors can share their accepted manuscript:

- Immediately
 - via their non-commercial personal homepage or blog by updating a preprint in arXiv or RePEc with the accepted manuscript;
 - via their research institute or institutional repository for internal institutional uses or as part of an invitation-only research collaboration work-group.
- After the embargo period
 - via non-commercial hosting platforms such as their institutional repository;
 - via commercial sites with which Elsevier has an agreement.

▶ In all cases accepted manuscripts should:

- link to the formal publication via its DOI bear a CC-BY-NC-ND license. The CC-BY-NC-ND license can easily be obtained through the website <http://creativecommons.org/licenses/> and is explicitly recommended by the EC to enable open access in its broadest sense.

6.2.6.2 ACM

The ACM policy can be found in the website https://www.acm.org/publications/policies/copyright_policy. ACM today adopts a very flexible scheme that ACM itself summarizes as follows:

“Authors have the option to choose the level of rights

management they prefer. ACM offers three different options for authors to manage the publication rights to their work.

- ▶ Authors who want ACM to manage the rights and permissions associated with their work, which includes defending against improper use by third parties, can use ACM's traditional copyright transfer agreement.
- ▶ Authors who prefer to retain copyright of their work can sign an exclusive licensing agreement, which gives ACM the right but not the obligation to defend the work against improper use by third parties.
- ▶ Authors who wish to retain all rights to their work can choose ACM's author-pays option, which allows for perpetual Open Access through the ACM Digital Library. Authors choosing the author-pays option can give ACM non-exclusive permission to publish, sign ACM's exclusive licensing agreement or sign ACM's traditional copyright transfer agreement. Those choosing to grant ACM a non-exclusive permission to publish may also choose to display a Creative Commons License on their works."

PIE News notices that also in case of the traditional copyright transfer all ACM publications allow Green Open Access without any embargo. Generally, the publisher's version/PDF cannot be used, but the author's refereed post-print can be uploaded for noncommercial use on author's personal website, institutional repository, open access repository, the employer's website or the funder's mandated repository. Publisher copyright and source must always be acknowledged, and there must be a link to the publisher version with a statement that this is the definitive version and Digital Object Identifier (DOI). A set statement must be added on the website/in the repository:

© ACM, YYYY. This is the author's version of the work. It is posted here by permission of ACM for your personal use. Not for redistribution. The definitive version was published in PUBLICATION, {VOL#, ISS#, (DATE)}

Statement reported on the Sherpa Romeo web site (<http://www.sherpa.ac.uk/romeo/pub/21/> as of June 30th 2016).

6.2.6.3 Springer

Generally, authors can archive post-print (i.e., final draft post-refereeing) on author's personal website immediately and on any open access repository after 12 months after publication. Publisher's version/PDF cannot be used; published source must be acknowledged and there must be a link to the publisher version, with a set phrase to accompany link to published version. Articles in some journals can be made Open Access on payment of additional charge. (see: <http://www.sherpa.ac.uk/romeo/pub/74/> as seen on June 30th 2016).

As far as Springer LNCS is concerned (see <http://www.sherpa.ac.uk/romeo/pub/2765/> as of June 30th 2016), authors can archive post-print (i.e., final draft post-refereeing) on author's personal website, institutional repository or funder's designated repository. Publisher's version/PDF cannot be used; published source must be acknowledged and there must be a link to the publisher version with DOI and a set phrase to accompany link to published version.

If Springer Open is chosen (see <http://www.sherpa.ac.uk/romeo/pub/948/> as of June 30th 2016), authors can archive post-print (i.e., final draft post-refereeing) and publisher's version/PDF. The published source must be acknowledged; authors retain copyright and a Creative Commons Attribution License must be attributed.

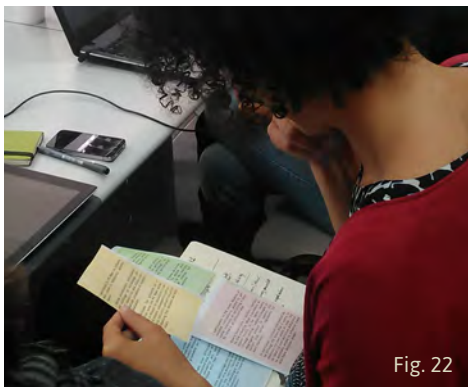


Fig. 22



Fig. 23



Fig. 24



6.2.6.4 SAGE

Journals published by “SAGE-Hindawi Access to Research” have a paid Open Access option. Authors retain the copyright of their article, which is freely distributed under the Creative Commons Attribution License, permitting the unrestricted use, distribution, and reproduction of the article in any medium, provided the original work is properly cited. In order to cover the costs of publication, Article Processing Charges are required for accepted manuscripts. (<http://www.hindawi.com/memberships/> as of June 30th 2016).

In subscription journals published by “SAGE Publications (UK and US)”, authors can deposit the version of the article accepted for publication (version 2) in their own institution’s repository. Authors may not post the accepted version (version 2) of the article in any repository other than those listed above (i.e., you may not deposit in the repository of another institution or a subject repository) until 12 months after first publication of the article in the journal. Authors may not post the published article (version 3) on any website or in any repository without permission from SAGE. When posting or re-using the article authors must provide a link to the appropriate DOI for the published version of the article on SAGE Journals (<http://online.sagepub.com>). (see <https://uk.sagepub.com/en-gb/eur/the-green-route-%E2%80%93-open-access-archiving-policy> as of June 30th 2016).

In Sage Pure Gold Open Access Journals, all articles provide worldwide, barrier-free access to the full-text of articles online, immediately on publication under a creative commons license. All articles are rigorously peer-reviewed retaining the quality hallmarks of the academic publishing process that authors would experience in publishing in any traditional SAGE journal. Most SAGE pure Gold Open Access journals are supported by the payment of an article processing charge (APC) by the author, institution or research funder of the accepted manuscript.

Some journals (8 titles: <http://www.sherpa.ac.uk/romeo/journals.php?id=1581&fidnum=|&mode=simple&letter=ALL&la=en>) published by SAGE Publications (UK and US) with the 12 months Embargo option let authors post on any non-commercial repository or website the version of their article that was accepted for publication – ‘version 2’. The article may not be made available earlier than 12 months after publication in the Journal issue and may not incorporate the changes made by SAGE after acceptance. When posting or re-using the article, authors should provide a link/URL from the article posted to the SAGE Journals Online site where the article is published: <http://online.sagepub.com>, and make the following acknowledgment:

The final, definitive version of this paper has been published in <journal>, Vol/Issue, Month/Year by SAGE Publications

Ltd, All rights reserved. c [The Author(s)]. Authors may not post the final version of the article as published by SAGE or the SAGE-created PDF { ‘version 3’.

See https://mc.manuscriptcentral.com/societyimages/wes/WES_ExclusiveLicense.pdf as of June 30th 2016.

6.2.7 Open Research Data

An interesting novelty of H2020 is the platform known as Open Research Data Pilot for the dissemination of the data that could be used by different researchers to replicate the experiments or the analysis presented in the scientific publications. Given its scope PIE News obviously participates in this pilot.

The topic of Open Research Data publication is much less debated, understood and agreed upon compared to scientific publication Open Access. In particular, the license of Data (open or not) is far more difficult, as Data are not subject to standard Intellectual Property rules. For instance, most of Creative Commons licenses (<https://creativecommons.org/share-your-work/>) may not apply to data as “derivative work” on Data is not clearly defined and manipulating a data set with purposes different from rendering may be inappropriate; sometimes even rendering and statistical analysis may change the actual meaning of the Data published. Similarly, licenses like Open Database License (ODbL) v1.0 (<http://opendatacommons.org/licenses/odbl/>) may not apply in many cases for both technical inconsistency (e.g., the wording “intermixing with other datasets” is a technically inconsistent definition) and it contains also semantic ambiguities. Furthermore, it is not clear at the time of writing, if for PIE News it is acceptable that all produced Data can be released also for commercial purposes.

Another additional issue with Open Research Data, is that very few Institutions support an Institutional Repository for Data. Also in this case, the Zenodo repository can be used as for scientific publications; however, we deem that it is still not possible to detail general procedures for the publication of Open Research Data.

Given this situation, in the first part of the project, PIE News will carefully select on a case-by-case basis the most appropriate license and the most appropriate level of aggregation and detail, as well as the most appropriate set of repositories where the Data produced during the research can be archived and made public. PIE News is confident that at M6, in D1.2, which is the revised version of the Data Management Plan, we will be able to set a more standardized procedure for Open Research Data publication within PIE News. Chapter 5 in any case details all the procedures that PIE News will follow to ensure the protection of personal data and individuals that may be involved in PIE News research.

6.2 CONCLUSIONS

The topics of Open Access and Open Research Data is one of the key debates open in the scientific world, specially in case of research project that are funded with public money. PIE News is not only a research project funded by the EC, but it is also a project that deals with societal challenges, socio-economic sustainability, the construction of a commons, and techno-legal provisions. As such its effort to disseminate and propagate results and findings must be, and it is indeed maximal.

This Chapter described the policy that PIE News as so far discussed, approved and set for its own best practices in scientific Open Access dissemination and in data collection and management to achieve Open Research Data.

Regarding Open Access to publications, on the one hand, we have clearly identified that most leading scientific publishers provide appropriate licenses and means to achieve Open Access, either through Green Open Access (i.e., re-publication on OAI-PMH compliant repositories) or through Golden Open Access. On the other hand, Golden Open Access is still very often ambiguous on the peer-review process, and the publication fees required to authors are hardly justifiable by the cost of electronic publishing. In conclusion, PIE News

does not see any obstacle to achieve a complete Open Access dissemination for all its scientific publications.

Regarding Open Research Data accessibility and licensing, we have found that the situation is far less clear, and that most Institutions are still most unaware of the problem and they do not provide appropriate repositories. At the same time, also the concept of license and of derivative for Open Data is not as mature as it is for publications, where the concept of copyright and the notion of intellectual property as well as creative work are well understood both at the technical and the legal level. Indeed, in many cases Data cannot be classified as a creative work, and the intellectual property of Data does not yet have a commonly accepted technical and legal definition. Furthermore, the publication of data must comply with legal provisions on privacy and individual protection. All the same, PIE News deems that data collected and used for scientific research (specially if receiving public funding), must be made available to the scientific community for validation and falsification of results and theories and to the public community at large for transparency and control. In the initial part of the project PIE News will decide on where to publish Open Research Data, and under which license on a case-by-case basis, guaranteeing in any case that published data is correctly indexed by the OpenAIRE platform.

BIBLIOGRAPHY

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APPENDIX A



CONTENTS

PIE News HOW WE LOOK

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04	The Logo
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12	Typography
13	Our Currency
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19	Print Supports
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2

INTRODUCTION

PIE News HOW WE LOOK

In the PIE News we are dealing primarily with the issue of poverty. Our main goal is to 'foster the emergence of commonfare as an alternative economic model'. The people we will be working with face serious problems in their every day life. With PIE News we want to engage these people in the building of the PIE News platform. Therefore we need to reach out to our target audiences and convince them to participate in our project.

The visual identity can help with this mission! Our project design guidelines are all about making sure the future PIE News users get to know the cool humans we essentially are, so you always know the reasons why and how we look (bright, minimalistic, polished), sound (straight-forward, confident, smart) and act (approachable, pro-user, sometimes pretty funny).

Because we are a brand new project it is important for us to maintain a consistent and distinctive identity. So always stick to these guidelines and keep them close at hand. Refer to them often. Get to know them well. The more familiar we all are with them, and the more we're all on the same page, the more distinctive, recognizable and effective our project will be.

1 - [PIE News proposal]

3

THE LOGO

PIE News HOW WE LOOK



At PIE News we like to have a lot of empty space as you can see in the logo. Empty space creates opportunity for envisioning alternatives and creativity, allowing the viewer to project his/her own ideas. The overall look of our project is clean and modern with a sense of humor added by the flying red pies. The motto is the old but always pertinent sentence 'Less is more' with a wink.

Our logo is very light. Use it big! It's fine to cut the logo a bit. You can cut up to 1/4 of the P or S letters but that's it. When placing it over pictures, make sure that the text stays readable and is sufficiently contrasting with the background.

Be sure that our logo can breathe; give it space. Don't place essential information under or next to it. But don't forget to be playful with it. You can use it in different positions just like a stamp.

THE LOGO Variations & Positioning

PIE News HOW WE LOOK

Full colour:



Smallest version:



Rotations:



To be used on the top center of the page.

Monochromatic:



Black & White:



+22.5° angle
To be used on the top left corner of the page or on the bottom right corner of the page.

On dark backgrounds:



On light backgrounds:



-30° angle
To be used on the top right corner of the page.
Never place logo on the bottom left corner of the page.

THE LOGO Examples of use

PIE News HOW WE LOOK



Pictures by Startupstockphotos

THE LOGO Don'ts

PIE News HOW WE LOOK



Don't change de logo.



Don't change the font of the logo.



Don't use the logo without the pies.



Don't add any elements into the logo.



Don't use the logo smaller than the stated guidelines.



Don't change the rotation of the logo to any angle that is not specified in this guide.



Don't change the colour of the logo to any colour that is not specified in this guide.



Don't place the logo on a background that is too close in tone.



Don't superimpose the logo over a busy graphic.



Don't change the proportions of the logo.



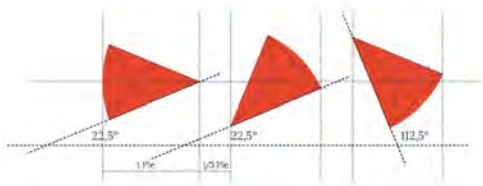
Don't brake the logo into multiple parts.



Don't use shadow with the logo.

THE PIES

PIE News HOW WE LOOK



The pies are our graphic element. They are the wink that makes everything a bit funnier. They stand for Inform, Share and Support - the main pillars of our platform. They are always red and organized in a kind of 'messy way', which makes the logo dynamic. They are in a very specific position and create a very original visual element. They can appear here and there and they can be used in a lot of different ways like to draw attention to a picture or parts of a picture; to separate massive parts of text; as background for page numbering; or as a rolling pie waiting for download information on our website. Be creative but don't overdo it.

The Pies appear always in a group of 3 or isolated. The Pies have their own specific positions. Do not use them in other positions than the ones shown in this guidebook. When used together, they have also a specific order. Do not change the order of the Pies neither the spacing between them.

PIE News HOW WE LOOK

THE PIES Examples



Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.



unc vel viverra ligula, nec fringilla nibh. Mauris dolor lacus, finibus molestie scibus non, laculis eget dui. Curabitur volutpat non nisi id condimentum onae facilisis ex vitae ipsum tristique, eu ultrices enim conwallis si met. Etiam bibendum condimentum risus, eu vestibulum sapien facilisis sed ed rutrum ornare felis, sed dignissim urna eleifend et. Maecenas semper, odio ec porttitor mollis, mi lorem commodo neque, in pellentesque enim augue ir isto.

Pictures by Startupstockphotos

OUR COLOURS

PIE News HOW WE LOOK



The primary PIE News color palette, consisting of PIE Blue, PIE Red, PIE White and PIE Maroon, is rich, contrasting and uplifting to give a positive feeling to the whole project. The PIE Blue and Red can be applied across PIE News communications to headlines, titles, primary messaging, backgrounds and visual elements but never on top of each other due to its extreme contrast i.e. do not use a PIE blue background with PIE red letters or images on top and vice versa. The PIE White could be applied to backgrounds or titles on top of dark colors, while the PIE Maroon should be used for the body text or very small visual elements. In this way we guarantee a bright vibrant color combination.





To complement the Primary Palette we have the Light Palette and the Shadow Palette. These two palettes should be used in specific cases when we want to have a one-color cover with the logo on it like in this guide. Do not use these two palettes isolated from the Primary Palette.

These colors are equivalent to the PANTONE color values cited in the table, the standards for which may be found in the current edition of the PANTONE Color Formula Guide. For 4-color process printing, refer to the CMYK values shown on the next page. For on-screen and web applications (PowerPoint, video, broadcast, web sites, intranets, extranets), refer to the RGB/HEX values specified.





OUR COLOURS

PIE News HOW WE LOOK





Primary Palette:

<p>CMYK: 70% 28% 46% 3%</p> <p>RGB: 82 144 193</p> <p>HSB: #52908B</p> <p>PANTONE: 5483 C</p>	
<p>CMYK: 3% 87% 92% 0.3%</p> <p>RGB: 231 71 46</p> <p>HSB: #E7472E</p> <p>PANTONE: 7417 C</p>	
<p>CMYK: 10% 7% 21% 0%</p> <p>RGB: 229 226 202</p> <p>HSB: #E5E2CA</p> <p>PANTONE: Cool Gray 1 C</p>	
<p>CMYK: 56% 74% 58% 56%</p> <p>RGB: 71 45 51</p> <p>HSB: #472D33</p> <p>PANTONE: Black 5 C</p>	

Light Palette:

<p>CMYK: 57% 21% 37% 0.5%</p> <p>RGB: 117 169 162</p> <p>HSB: #75A6A2</p> <p>PANTONE: 5493 C</p>	
<p>CMYK: 2% 72% 65% 0%</p> <p>RGB: 236 108 88</p> <p>HSB: #EC6C58</p> <p>PANTONE: 7416 C</p>	
<p>CMYK: 8% 5% 16% 0%</p> <p>RGB: 234 232 213</p> <p>HSB: #EAE8D5</p> <p>PANTONE: 663 C</p>	
<p>CMYK: 54% 62% 50% 25%</p> <p>RGB: 108 87 192</p> <p>HSB: #6C575C</p> <p>PANTONE: 7615 C</p>	

Shadow Palette:

<p>CMYK: 77% 42% 55% 19%</p> <p>RGB: 62 108 104</p> <p>HSB: #3E6C88</p> <p>PANTONE: 5477 C</p>	
<p>CMYK: 22% 91% 100% 14%</p> <p>RGB: 173 53 35</p> <p>HSB: #AD3523</p> <p>PANTONE: 7627 C</p>	
<p>CMYK: 34% 27% 40% 0%</p> <p>RGB: 172 170 152</p> <p>HSB: #ACAA98</p> <p>PANTONE: 414 C</p>	
<p>CMYK: 60% 73% 61% 68%</p> <p>RGB: 53 34 38</p> <p>HSB: #352226</p> <p>PANTONE: Neutral Black</p>	

Variations in color may occur, but try to match the PIE News color palette as closely as possible. Print vendors may have their own values and formulas for matching PANTONE colors in 4-color process, but the goal should always be to match the PANTONE standard of the PIE News color palette. Color variations may also occur on-screen as a result of different screen calibration and/or software application being used.

The colors shown throughout this manual have not been evaluated by Pantone, Inc. for accuracy and may not match the PANTONE Color Standards. PANTONE is a registered trademark of Pantone, Inc.

TYPOGRAPHY

PIE News HOW WE LOOK

Asap Regular

ABCDEFGHIJKLMNOPQRSTUVWXYZ
 abcdefghijklmnopqrstuvwxyz
 1234567890!?!&@€

Asap Medium

ABCDEFGHIJKLMNOPQRSTUVWXYZ
 abcdefghijklmnopqrstuvwxyz
 1234567890!?!&@€

Lora Regular

ABCDEFGHIJKLMNOPQRSTUVWXYZ
 abcdefghijklmnopqrstuvwxyz
 1234567890!?!&@€

To help provide a consistent, unified look in the PIE News' use of typography, we have a combination of the Asap with Lora typeface to use on all communications for the PIE News project. Both fonts are Google fonts with an Open Font License (OFL), which facilitates the work of the programmers in a later stadium of the platform development. Together they make a great contrast and help with the playfulness of the overall look.

The Asap Regular characters are simple yet distinctive and supports the light feeling that we want to have in PIE News project. Therefore always capitalize the headers and titles with Asap Regular. Use 80 of tracking in InDesign and character spacing expanded by 3 in Microsoft Word and PowerPoint and a font size of at least 16pt for an A4 document. For the lead and captions use the Asap Regular with 11pt size, double spacing and aligned to the left. For the body text use Lora regular with 8pt size, a justified paragraph and a line spacing of 1.5 lines. This is an elegant serif font that makes reading much easier.

In case these fonts are not available, you can substitute them for Verdana and Georgia respectively.

OUR CURRENCY

PIE News HOW WE LOOK



From 0 to 99 Pies

From 100 to 999 Pies

Above 1000 Pies

The symbol for our currency is a coin with 3 pies on it. Contrary to the dollar, we don't trust in gods, we trust in commonfare. We truly believe that commonfare can change the way we structure our economy and society and that idea should be spread as much as possible throughout our community. Money has always been not just a tool for trading, but also an instrument for communication and cohesion. Already in the roman times money was used to inform who had the power. In our days this is no different. So, let's use it to spread our wonderful concept of commonfare.

We never refer to our currency as coins although it has a two-dimensional form of a coin. At the end of the day the fact is that money is just a numeric amount and does not need to exist in the physical world. Our currency unit is the Pie. We refer to it as pies: "How many Pies do you have?"; "Sale! Only 5 Pies!"; "I want to earn 100 Pies."

In your computer screen, the Pie appears in 3 different colors: red if you have between 0 and 99 Pies; blue if you have between 100 and 999 Pies; and purple if you have more than 1000 Pies. Under the currency icon will appear the specific amount of Pies you own.

CREATIVE COMMONS

PIE News HOW WE LOOK



For PIE News we will be using the Creative Common (CC) licensing. Visually the CC logo is very specific and dark. Fortunately in CC policy they allow us to change the colors as long as the two colors chosen have a contrast ratio of at least 3:1. The only restriction is to not use the color red or tones near to it, because it conveys "No" or "Restricted". Taking that into consideration the CC logo has two possibilities of coloring: the PIE Blue and the PIE Maroon as presented in the image. Depending on the space available, you can use the normal or the small version of the CC logo. Be sure to apply to this logo the same don'ts that we have to our own logo.

ILLUSTRATIONS

PIE News HOW WE LOOK



Meet Micha & Kevin. They are the characters for the PIE News project. They know everything about it and they want to tell everyone about it. Micha is Italian and Kevin is Dutch, their English is very good, but they speak with an accent. They are not kids; they are young adults and have an adult voice. They are very smart and speak in a very understandable way. They oftentimes find themselves in the situation of the potential PIE News Platform user, but they are very creative and full of ideas without being arrogant. They are likable, friendly, funny and down to earth.

They will appear in presentation videos and info-graphics introducing the PIE News project or presenting new concepts like commonfare. They can also help explain how the PIE News platform works in video tutorials or pop-up at various places on the website guiding the viewer through performing different actions. Especially in the beginning of the project, while there is no visual material, they can be very useful and create a personal connection with the potential users.

The entire context around Micha & Kevin should fit within their appearance: a simple and clean style without a lot of details and soft but vibrant colors. Micha & Kevin have their own palette that complements the PIE News palette, as you can see on the next page. You are free to design your own objects that you need to complete the story that Micha & Kevin are telling as long you follow their visual look. Try to use as much as possible the colors of the PIE News palette. But if you really must to create new colors, keep them warm and uplifting.

ILLUSTRATIONS Examples

PIE News HOW WE LOOK



PHOTOGRAPHY

PIE News HOW WE LOOK



Throughout our communication we will be using photography. This photography will be made during workshops and public interventions or presentations. We have a distinctive photographic style based on a warm sense of welcoming with a vintage look. It should reflect the positivity of the PIE News project and make people want to visit the PIE News Platform or be involved in the project. The keywords are: warm, friendly, fun, open, optimistic and positive.

Shots should be simple, direct and feature real people. They should show interaction to reflect relationships between people. The people captured, can either be looking off camera or making direct eye contact. People should look positive, approachable and natural with an appropriate mix of race, age and gender to reflect the project. The pictures should be cropped to avoid empty spaces and to focus on the action that is happening in the image.

To achieve the vintage look the pictures should be treated with 2 filters: a Soft Light orange [#FB7600] filter at 15% to give a warm overall look and a Lighter Color gray [#2F2F2F] filter at 50% to soften the blacks. Never use black-and-white unless intended for monochromatic applications.

PHOTOGRAPHY Treatment

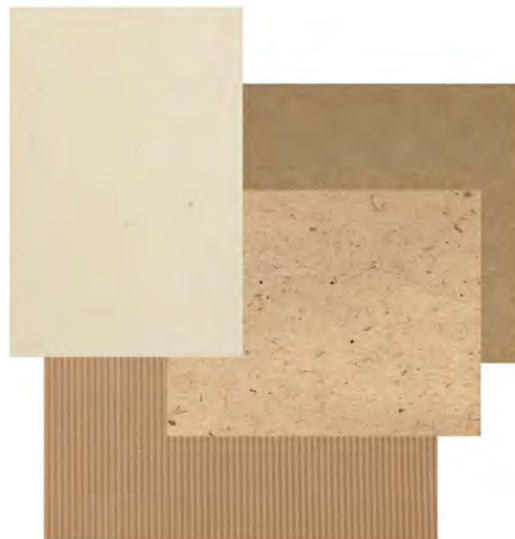
PIE News HOW WE LOOK



Final picture

PRINT SUPPORTS


PIE News HOW WE LOOK






At PIE News we are also concerned with climate change. Knowing that the poor are the ones who will suffer its consequences first, we want to promote good practices in this subject. Therefore all print products will be done on recycled paper. When binding documents in copy shops, choose for the silver metal spiral bound option and ask for a thicker recycled paper cover in the front and back of the document without plastic. There is a big variety of recycled paper, it's your choice, be creative as long as it's recycled.

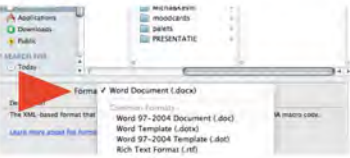
TEMPLATES

PIE News HOW WE LOOK




Templates will play an important roll in our project to guaranty a coherent visual look throughout all documents. You will receive templates for two different software packages: Microsoft and LibreOffice. As soon you open the template, save it with a new name to prevent overwriting the template. When saving, don't forget to select the right formatting in the save popup window. On the next pages you will read more instructions for each template in particular.



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TEMPLATES

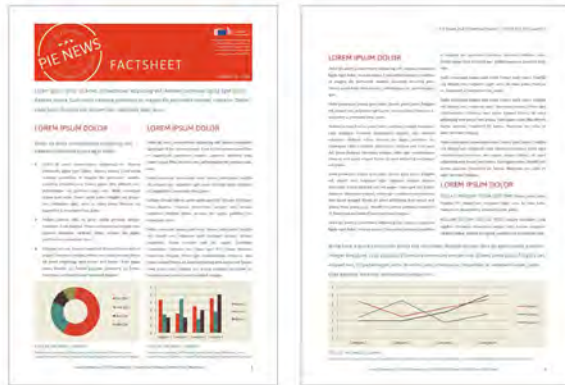
PIE News HOW WE LOOK



This is a very simple template to use for letters or other documents. The template has the format of a formal letter. You have text placeholders for the different areas. When you click in those areas the text disappears automatically and you can then write the text you need. Unfortunately placeholders function is not available in OpenLibre. Please, try to keep the same text format. If you do not need these areas, then you can select them and erase them with the backspace in your keyboard. Then, you will have a plain document just with the header and footer. The letter body is a normal paragraph. Please, use here always the font Lora Regular with the PIE Maroon color specified in the color section.

21

TEMPLATES The Factsheet



The Factsheet is a bit more complicated than the letter template. All texts in the two pages are placeholders. This means that as soon as you click on the text, the present text will disappear giving you space for your own text. Always use the PIE style texts given in the Styles box. The Style box is in the home tab. To select the right

PIE News HOW WE LOOK

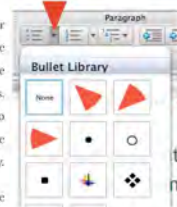
style, select first the text and then click in the PIE style on the Style box.



If you don't find the Styles box it's because you are in the Publishing Layout view (this can happen when you open a template). To go back to the Printing Layout view, go to the left bottom corner of your document and click in the Printing Layout view.



When you use bullets in your document, don't forget to use the PIE bullets. First select the text you want to have in bullets. Then click on the arrow next to the bullet icon and choose the PIE bullet in the Bulleted Gallery.



The graphics that you see in the bottom of the page are linked with Excel. To configure the chart, click two time on top of it and an excel window will open. In the second tab of the Excel document, you will find the sheet where you can change the values and titles of your chart. When you are done click back on the chart tab and close the Excel window. The chart will be automatic uploaded.

All elements on this page are boxes that can be moved and/or erased if you don't need them.

TEMPLATES The Deliverable



PIE News HOW WE LOOK

This template has many different pages and a complex design, with pictures to make the reading more interesting. For that reason, you will be receiving a Working Template, with a simple formatting that you can use and share with your colleagues to work collectively on the text without having issues with the template format. When you achieve the final text, deliver it to the designer to be inserted in the final template.

To make this workflow easier, always give your text and titles the right PIE style given in the Styles box. The styles are in the Home tab [as you can see in the picture below]. Do not change the font or size or any other attribute of your text, because you will be changing the format of the style and interrupting the workflow, making it hard to place your text in the final template and increasing the probabilities of mistakes. Each style has its own name and it's meant for different parts of the text. You just need to select the text and then click on the Style you need to use.



If you don't find the Styles box is because you are in the Publishing Layout view (this can happen often when you open a template). To go back to the Printing Layout view, go to the left bottom corner of your document and click in the Printing Layout view.



You can find further instructions in the Working Template.

TEMPLATES The Deliverable



PIE News HOW WE LOOK

In the PowerPoint Template you will find a range of pre-formatted slides to use. All text that you see in the slides is in placeholders' boxes. This means that as soon as you click on the text, the present text will disappear giving you space for your own text. The text is already in the right formatting and color. Please, try to respect this formatting and only change it if it is really necessary.

Besides the normal layouts given by PowerPoint you will also have specific slides with infographics ready to be used in your presentations. In this infographics slide, you will find placeholders for text and placeholders for images. Here you can insert a PIE icon that fits your presentation and illustrates your story. You can find these PIE icons in the folder named icons given to you together with the templates. Always use the white variations of the icons.

To use the PIE slides, go to the Home Tab, click in the New Slide button and from the dropdown menu chose the layout you want to use.



Because PowerPoint gives very limited options to create cover layouts in the Master Slide, we decided to prepare a cover outside the Master Slide. You can use the picture

in the cover or replace it for one that fits your presentation. Please, try to take in consideration the visibility of the PIE logo and always send the picture to the background. Do not change the colors nor the sizes of the titles, neither their positions in the canvas.

TEMPLATES The Business Card



PIE News HOW WE LOOK

This template is delivered to you in a PDF form format. In this way, after you finish to inset your information, you will be saving a PDF ready to send to a print shop. In this template you have 3 different areas. The first one is intended to insert your name. The second area is for your phone number and e-mail address. The last area is for your address. You are free to insert any other information that suits you better in the second and third area.

APPENDIX B



[Place], [date]

[Institutions' header]

SUBJECT INFORMATION AND CONSENT FORM

PIE News – Poverty, Income, and Employment News

Dear Madam/Sir,

Thank you for your availability.

We are a research group from [organization, e.g., University of Trento working at the Department of Engineering and Information Science] and we are members of the project “PIE News” financed by the European Union.

The project, started in July, 2016, is carried out by a consortium involving both Universities and European civil society organizations aimed at realizing a digital platform (website/mobile) that can help people who are experiencing financial difficulties. The platform will include useful information about welfare state provisions offered in the European states involved in the project, about the means for sharing good practices on how to handle everyday life, and about means for a collaborative economy. The purpose is to improve European population' life conditions.

We aim at studying how digital tools may be useful for improving your life conditions, in order to realize a suitable digital platform. The purpose of meetings is to collect people's opinions for handling their real needs. During meetings, both through questions and answers, and the production of artefacts as drawings, maps, lists, and paper-pattern of interfaces, the way digital tools may improve the life conditions of people experiencing financial problems will be examined. By participating at these meetings, you can actively contribute to the project, hence allowing us to realize a platform that fits with real people's need.

If you declare your availability in participating to the study, you are asked to read and sign an informed consent form. Only after you declare your consent, activities can continue.

Each meeting will be audio- and video-recorded and some pictures of produced artefacts will be taken in order to allow a better analysis of gathered data.

We remind you that you can interrupt your participation at any time without need of explanation; however, all data collected until that moment will be analyzed coherently with the research purpose, merely scientific.

Any costs you have to afford in order to participate in the meetings (e.g. travel costs) is refundable upon receipts of payment delivering (e.g. bus ticket).



CONSENT TO THE USE OF PERSONAL DATA (PRIVACY LAW)

In order to participate in the study you are asked to sign the informed consent to the use of personal data form. Each collected information is strictly confidential. Only researchers involved in the study will gain access to your data and they will use them in an anonymous form for further analyses and for gathering relevant information coherently with the research purpose. The research coordinator and researchers involved are committed to anonymize data in compliance with the regulation about personal data privacy ([relevant legislation, e.g. D.Lgs. 196/2003]), that is the Deontological and good behavior Code for the treatment of personal data for statistical and scientific purposes. Especially, the anonymization, realized mainly as pseudonymization and generalization, concerns each information that may allow, both directly and indirectly, identification of participants.

DATA PROTECTION AND RETENTION

In compliance with the Data Management Plan, the retention of audio- and video-recordings and subsequent transcripts, properly anonymized, will enforce adequate safety measures. Data retention will be guaranteed by the usage of protected and safe archives at University of Trento, that has a high expertise on this. The access to these archives is protected by passwords and restricted among research team members. In case of threats against security, data containing information that allows the identification of subjects (as the file linking pseudonyms with personal data collected through the informed consent form) will be destroyed, except a paper-based copy that, if possible, will be stored into the research coordinator's safe-deposit box.

DISSEMINATION OF RESULTS

Research results can be disseminated through journal articles and conferences presentations, as well as any other modality for the exchange and the release of scientific information considered suitable at the discretion of researchers, but always guaranteeing participating subjects' anonymity.

INFORMATION

For any further information or request related to this study, the following members of the research project are available:

[e.g. Dott.ssa Chiara Bassetti, chiara.bassetti@unitn.it]

The present study has been evaluated and approved by the Ethical Committee for Experiments involving human beings of University of Trento and it will be carried out in compliance with the ethical principles as stated by the Declaration of Helsinki for research involving human subjects.

If you have any doubt about correctness and coherence of the research implementation in relation with what this form states, you can address advisories to [e.g. Rettorato, Via Calepina, 14 - 38122 Trento].

WE RECOMMEND TO KEEP A DUPLICATE OF THE PRESENT INFORMATIVE FORM IN ORDER TO CONSULT IT IN THE FUTURE.



PLEASE COMPLETE THIS FORM AFTER YOU HAVE READ THE INFORMATION SHEET AND/OR LISTENED TO AN EXPLANATION ABOUT THE RESEARCH

Title of Study: PIE News – Poverty, Income, and Employment News

Thank you for considering taking part in this research. The person organizing the research must explain the project to you before you agree to take part. If you have any questions arising from the Information Sheet or explanation already given to you, please ask the researcher before you decide whether to join in. You will be given a copy of this Consent Form to keep and refer to at any time.

- I confirm that I understand that by ticking each box I am consenting to this element of the study. I understand that it will be assumed that unticked boxes mean that I DO NOT consent to that part of the study. I understand that by not giving consent for any one element I may be deemed ineligible for the study.**
- I confirm that I have read and understood the Information Sheet for the above study. I have had the opportunity to consider the information and asked questions which have been answered satisfactorily.
- I understand that I will be able to withdraw from taking part in the study provided that data gathered during the period of participation will be used for research.
- I consent to the processing of my personal information for the purposes explained to me. I understand that such information will be handled in accordance with the terms of the [legislation reference, e.g. D.Lgs. 196/2003].
- I understand that confidentiality and anonymity will be maintained and it will not be possible to identify me in any publications.
- I consent to my conduct being audio- and/or video-recorded. I agree that video recordings, transcriptions and the other data gathered through this study will be used by the researchers for publications and presentations during seminars, conferences, lectures and the like. I understand that data will be handled in accordance with the terms of the [legislation reference, e.g. D.Lgs. 196/2003].
- I agree that the researchers may use data for future research and understand that any such use of identifiable data would be reviewed and approved by a research ethics committee. (In such cases, as with this study, data would not be identifiable in any report or publication).
- I agree to be contacted in the future by researchers of the PIE News team and/or of the University of Trento who would like to invite me to participate in follow up studies to this project, or in future studies of a similar nature.
- I understand that confidentiality cannot be guaranteed during the workshops of this research study.

Name of Participant

Date

Signature

Name of Researcher

Date

Signature

APPENDIX C



[Place], [date]

Invitation to participate, as participant, to the project: PIE News – Poverty, Income, and Employment News

Dear Madam/ Sir,

We are a research group from five European countries working on a project financed by the European Union (PIE News). The project started in July, 2016. We established a consortium involving both Universities and civil society organizations aimed at realizing a digital platform (website/mobile) that can help people who are experiencing economic difficulties. The platform will include useful information about welfare state provisions offered in the European states involved, about the means to share good practices on how to handle everyday life, and about means for a collaborative economy.

In a nutshell, the project aims at fostering the improvement of life conditions among people with financial difficulties.

By this letter thus, we kindly ask you your availability to participate in an interview, focus group, or workshop during which it will be examined how digital tools may be useful for improving life conditions of people with economic difficulties, both by questions and answers, and the production of artefacts as drawings, maps, lists, and paper-pattern of interfaces.

Your contribution will be essential for realizing a digital platform that fits the set purposes more effectively. In compliance with the agreement that we signed with the European Union, the source code of the platform will be freely available through an open-source modality.

I look forward to hearing you.

Your faithfully,

[Name of researcher, e.g. Chiara Bassetti, University of Trento]