This project has received funding from the European Union's Horizon Europe research and innovation programme under grant agreement No 101069529 and from UK Research and Innovation (UKRI) under the UK government's Horizon Europe funding guarantee [grant No 10038991].

How to Go Open: A Practical Guidebook for Horizon Europe Cluster 5 Projects

Mojca Drevenšek

February 2026

SSH CENTRE
Social Sciences & Humanities for Climate, Energy aNd Transport Research Excellence

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Suggested citation
Drevensek, M. 2026. *How to Go Open: A Practical Guidebook for Horizon Europe Cluster 5 Projects.* Cambridge: SSH CENTRE. https://doi.org/10.5281/zenodo.18348054

Cover design & formatting by María Torres-Senés and videos by Sonia Moreno, Acento Comunicación.

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1. Why This Guidebook?

1.1. About SSH CENTRE

Social Sciences & Humanities for Climate, Energy aNd Transport Research Excellence

SSH CENTRE (Social Sciences and Humanities for Climate, Energy aNd Transport Research Excellence) was a Horizon Europe project that aimed to strengthen collaboration between SSH and STEM disciplines in order to accelerate the EU's transition to carbon neutrality.

By engaging stakeholders across research, policy, business, and civil society, SSH CENTRE promoted social innovation, inclusive engagement, and transdisciplinary policy advice. Project activities included building SSH-STEM partnerships, supporting regions in transition, and designing strategies for citizen involvement in EU research and innovation.

1.2. Why This Digital Guidebook?

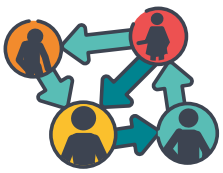
This guidebook is part of SSH CENTRE's commitment to Open Science and Open Education, helping Horizon Europe Cluster 5 projects move from theory to practice. It distils lessons from SSH CENTRE's hands-on experience and offers practical steps for coordinators, researchers, and innovation leads to embed openness in their work, ensuring transparency, collaboration, and impact. Open Science is not just a compliance requirement—it is a catalyst for trust, knowledge exchange, and scalable solutions to climate, energy, and mobility challenges.

Climate, energy, and mobility transitions demand more than technical breakthroughs. They need **social insight, transparency, and collaboration**. Open Science is not just a compliance checkbox; it's a way to **accelerate impact, build trust, and enable reuse** across disciplines and sectors.

This guidebook builds on insights from SSH CENTRE's **Open Social Science Webinar**, where over 30 researchers and stakeholders explored how to make SSH research more open, accessible, and impactful.

These discussions, together with expert contributions, shaped the foundation for our **interactive online course**, *Open Social Science for Climate, Energy and Mobility Transitions*. The course offers five practical modules to help you apply Open Science and Open Education principles in real projects – making openness actionable from day one.

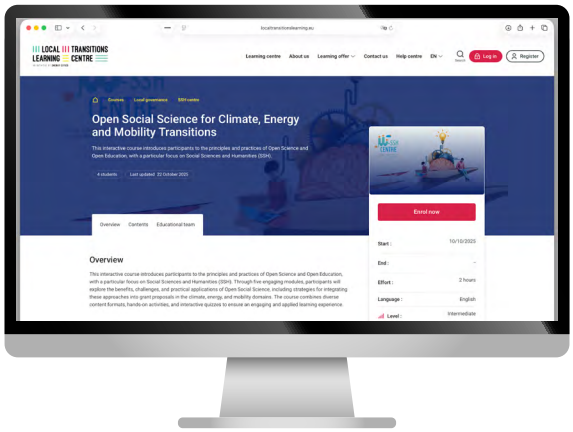
The SSH CENTRE included an ongoing evaluation of the project (Formative Accompanying Research). As part of this research, 33 semi-structured interviews were conducted with participants of three epistemic experiments that were created and run by the SSH CENTRE (Interdisciplinary Collaborations for EU Policy Recommendations, Transdisciplinary Knowledge Brokerage Initiative, and Debating Europe Citizens' Engagement). One of the topics in the interviews focused on participants' experiences with Open Science, and on their perceptions of its role and barriers in European research. Insights from the Formative Accompanying Research were written up into a report and in 10 Briefing Notes (BNs) - excerpts from BNs are included within this guide to illustrate the key topics discussed. Excerpts are labelled to the corresponding number of the BN they are from. (The full report and overview of epistemic experiments can be found in the Briefing Note Collection of SSH CENTRE[1], and a full description of the methodology is available on Zenodo[2], an open, non-profit research repository where anyone can freely upload, share, and preserve research outputs.)



1 Leventon, J., Gerlich, V., Prášilová, T. (eds.), 2025. *Ten challenges for successful inter- and transdisciplinary collaboration: Briefing Note collection of SSH CENTRE.* Cambridge: SSH CENTRE. https://doi.org/10.5281/zenodo.17608088

2 Leventon, J., Gerlich, V., Prášilová, T. (2025). T5.1 Formative Accompanying Research (FAR). Zenodo. https://doi.org/10.5281/zenodo.17551759

Link to the SSH CENTRE online course Open Social Science for Climate, Energy and Mobility Transitions is available **here** or scanning the QR code.

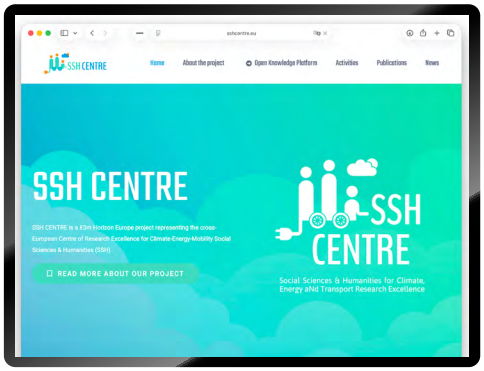


> *"I'm a strong proponent of publishing as much as possible in open science journals and using open science as a platform to make what we produce available to whoever is interested in it with as few barriers as possible.*
>
> *The goal is to make science information accessible without having barriers, whether it is financial or other sorts of challenges, so that people can access information."*
>
> (Participant in the Interdisciplinary Collaborations)

What's Inside This Guidebook?

This practical guide covers the essentials of going open in Horizon Europe Cluster 5 projects, including **Open Science principles**, **Open Social Science practices**, and **SSH-STEM collaboration strategies**. You'll find **step-by-step workflows**, **recommendations for proposals**, and **tips for embedding openness throughout your project**. The guidebook is enriched with **infographics, videos, quotes from researchers, and links to additional resources**, making it easy to turn theory into action.

Ready to make openness your competitive edge? Start today and position yourself as a leader in collaborative, impactful research!



Visit the SSH CENTRE website by clicking this **link** or scanning the QR code

2. What is Open Social Science?

2.1. Our Starting Point: UNESCO Framework - Four Pillars of Open Science

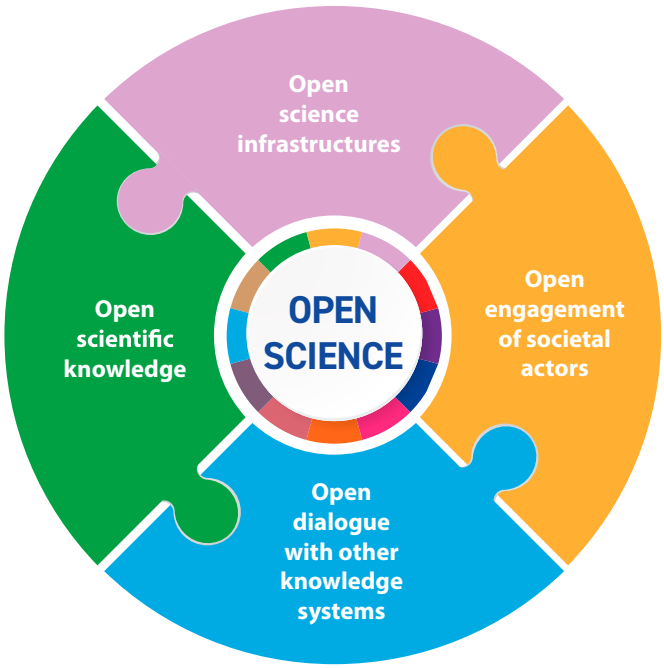
SSH CENTRE aligned its Open Science approach with UNESCO's framework for openness. These pillars ensure that openness is **systemic, inclusive, and actionable**:

Pillar 1: Open Scientific Knowledge
Share research outputs (data, publications, methods) in accessible, reusable formats under open licenses.

Pillar 2: Open Science Infrastructures
Build and use open and non-profit platforms that enable collaboration, long-term preservation and access.

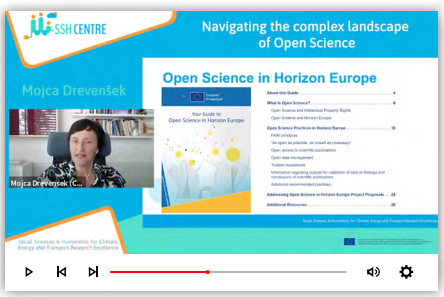
Pillar 3: Open Engagement of Societal Actors
Collaborate with stakeholders beyond academia, e.g., policy, industry, and civil society for inclusive, responsive research.

Pillar 4: Open Dialogue with Other Knowledge Systems
Integrate diverse perspectives, e.g. local or regional knowledge systems, while respecting ethics and sovereignty.



UNESCO, 2021

Why it matters: These pillars guide efforts to make research outputs accessible, foster inclusive collaboration, and integrate diverse perspectives. By embracing these principles, Horizon Europe Cluster 5 projects can deliver solutions that are equitable, innovative, and ready for real-world application.



Video 1: Open Science in Horizon Europe – Navigating the Complex Landscape of Open Science (Mojca Drevensek, Consensus)

This 4-minute video introduces the landscape of open science, you can watch it by scanning the QR code or clicking this **link**.

2.2. The Specifics of Open Social Science

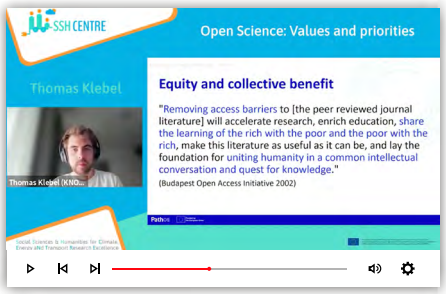
Open Social Science applies the principles of openness to research that is deeply context-sensitive, ethical, and qualitative. Unlike STEM fields, where reproducibility and technical standards dominate, SSH disciplines focus on co-production, reflexivity, and societal relevance - making openness about dialogue and inclusion, not just data sharing.

SSH often strongly supports Open STEM Science, and interdisciplinarity is frequently a prerequisite for implementing Open Science effectively. However, SSH's role goes far beyond communication or stakeholder engagement. It includes problem framing, justice assessment, and governance design. These are critical functions for shaping fair and sustainable transitions.

Climate, energy, and mobility transitions need social insight, not just technical solutions.

Challenge: Despite a noticeable increase in inter- and transdisciplinary funding opportunities for SSH, there is still a strong tendency for research agendas to prioritize goals and approaches that relegate SSH to a service role.

Call texts frequently centre STEM objectives and approaches, with SSH mentioned as an add-on. Proposals may require a technology work package (WP) with milestones, while SSH is relegated to 'enhance the societal impact', with no dedicated SSH WPs and no SSH-led outputs.



Video 2: From Access to Inclusion – Re-thinking Open Science Priorities for SSH (Thomas Klebel, Know Center Research GmbH)

This 5-minute video is about rethinking Open Science Priorities for SSH. Watch it by clicking this **link** or scanning the QR code.

3. Open Science in (SSH) Research Proposals

3.1. From Proposal to Practice

Open Science isn't just a Horizon Europe buzzword - it's embedded in the evaluation criteria for project proposals. Indeed, the sections on **Excellence**, **Impact**, and **Implementation** all value Open Science.

Many projects plan Open Science activities but fail to label them clearly, which can cost points during evaluation. There are benefits in treating Open Science as a strategic thread, rather than an afterthought: show how Open Science shapes your methodology, stakeholder engagement, and dissemination from day one.

3.2. Where It Fits in Your Proposal

Open Science belongs in more than one section:

- Under **Excellence**, highlight how openness strengthens your research design and objectives.
- In **Impact**, link Open Science to your communication, dissemination, and exploitation strategy—this is where evaluators expect concrete commitments.
- And in **Implementation**, embed Open Science tasks in work packages and partner roles. A dedicated task in your communications WP is the minimum; ambitious projects weave openness throughout.

3.3. Why SSH Projects Have an Advantage

A project that takes SSH seriously has a lot to say about Open Science. SSH methods like co-production, reflexivity, and societal engagement are inherently open and interdisciplinary. Use this to your advantage: position SSH as a driver of transparency, inclusion, and long-term impact. Horizon Europe evaluators increasingly value this approach, especially in Cluster 5 calls where societal readiness and stakeholder dialogue are critical.

Video 3: The European Commission's View on Open Science in Horizon Europe (Chris Foulds, ARU)

Link video 3 here

Video 4: Open Science in Horizon Europe Proposals (Chris Foulds, ARU)

Link video 4 here

These two short videos introduce the European Commission's expectations and evaluations of Open Science in Horizon Europe Pillar 2 (Cluster 5) projects. You can access them via these QR codes and links.

Open Science practices - including publishing data, organising public dissemination activities, using Open Access journals, and participatory research methods - can help improve research quality, increase the acceptance of research results, support fairness, and foster mutual learning. To learn more about these processes, read the SSH CENTRE **Briefing Note** on Engaging stakeholders and audiences in inter- and transdisciplinary collaboration.

4. Tools and Processes to Support 'Going Open'

Over the course of the SSH CENTRE project, we utilised a number of different tools and processes to support our Open Science activities. Each of these tools and processes map onto a pillar of the UNESCO Framework of Open Science.

Using these tools and processes helped make our research activities accessible, citable, and reusable. We were also able to foster inclusive collaboration, regional relevance, and co-produced knowledge through these tools and processes.

The tools and processes used include:

- Zenodo for open data
- SSH Open Knowledge Platform
- Stakeholder collaboration through Knowledge Brokerage
- Regional inclusion of underrepresented researchers

Each of these will now be introduced, before outlining the practicalities of what we did and how other projects can replicate or remix our Open Science activities.

Video 5: Experiences of Open Science during Project Implementation (Rosie Robison, ARU)

Watch it by clicking this **link** or scanning the QR code.

4.1. Zenodo for Open Data

Zenodo is an Open Access Data Repository, where you can upload project materials and outputs for others to access and use. We uploaded a range of materials to Zenodo, including deliverables, data collection resources, and project data.

Details on how we approached this, and how other projects can replicate or remix are outlined below.

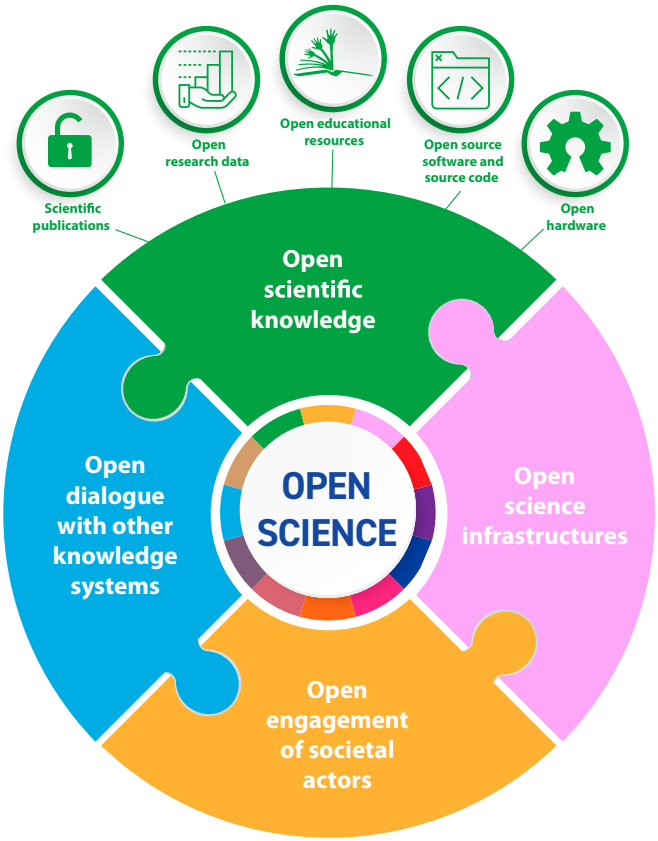
What we did:

- Developed templates to support the upload of materials to Zenodo. These templates covered all the required information for a Zenodo upload, and were used by consortium partners to ensure consistency in their Zenodo uploads.

  You can access the template here: https://doi.org/10.5281/zenodo.18347662
- Assigned clear responsibilities for data sharing amongst consortium partners
- Included a suggested citation (including a DOI) in each deliverable and project output, facilitated by the 'reserve DOI' function on Zenodo
- Uploaded anonymised transcripts, reports, and visuals

How other projects can replicate or remix:

- Use our Zenodo upload template to streamline your upload process
- Embed the upload of materials to Zenodo into your Data Management Plan and dissemination strategy
- Obtain a DOI for your project outputs before their publication and include a suggested citation within outputs
- Share not just final outputs, but also intermediate data and methods



UNESCO, 2021

> ***"For me, I think Open Science is also about being transparent in the methods and the data that you use, and making it available as well, to the people reading the research articles. I think [in] our group (...), it's part of the custom to always publish the code and the entire algorithm that you used available online. (...) I think it's part of doing science in the 21st century."***
>
> (Participant in the Interdisciplinary Collaborations)

Video 6: Zenodo for Open Data (Ami Crowther, ARU)

This 5-minute video summarises how we used Zenodo within the SSH CENTRE project, providing useful tips and tricks. Link **here.**

4.2. SSH Open Knowledge Platform

As part of the SSH CENTRE project, we created an Open Knowledge Platform (OKP). The OKP includes a library of useful SSH resources as well as synthesises insights and outputs from the project through the Exploration Space.

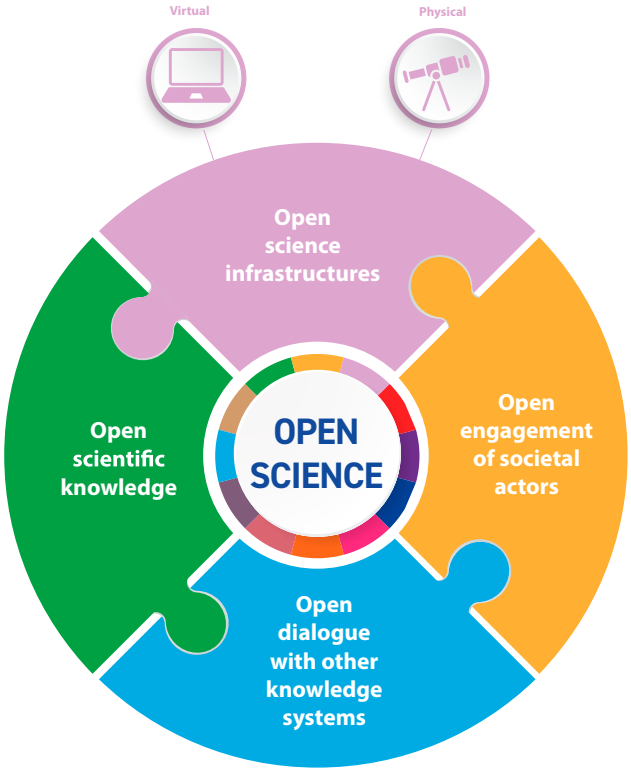
Further details on the OKP practicalities, and how other projects can replicate or remix are outlined below.

What we did:

- Built an Open Online Library for curated SSH resources
- Created an Exploration Space with information and resources focused on climate, energy and mobility
- Provided researchers and stakeholders the opportunity to contribute materials to the Open Knowledge Platform
- Ensured all hosted content is fully open access and reusable

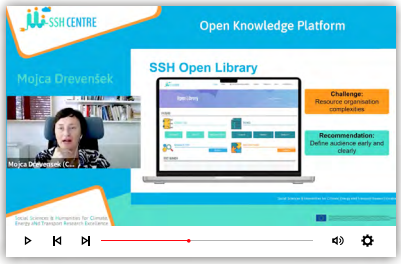
How other projects can replicate or remix:

- Suggest submitting your own open-access materials to the Open Library and/or sharing your project outputs on the Open Knowledge Platform, amplifying the visibility of your materials. If you'd like to contribute your open-access materials, get in touch with us at europe@acentocomunicacion.com
- Integrate links to our SSH Exploration Space resources within any policy briefs and stakeholder reports that you produce.
- Leverage the Open Knowledge Platform to connect SSH insights with real-world challenges



UNESCO, 2021

> ***"Open science I think, is about making your resources accessible in many different ways and levels. Probably in a way that actually encourages participation as opposed to just sitting there, that the people can come if they want to. It's kind of slightly more outward facing."***
>
> (Participant in the Knowledge Brokerage Initiative)



Video 7: SSH Open Knowledge Platform (Mojca Drevensek, Consensus)

This 6-minute video introduces the SSH CENTRE's Open Knowledge Platform. You can watch it via this **link** or by scanning the QR code.

4.3. Stakeholder Collaboration through Knowledge Brokerage

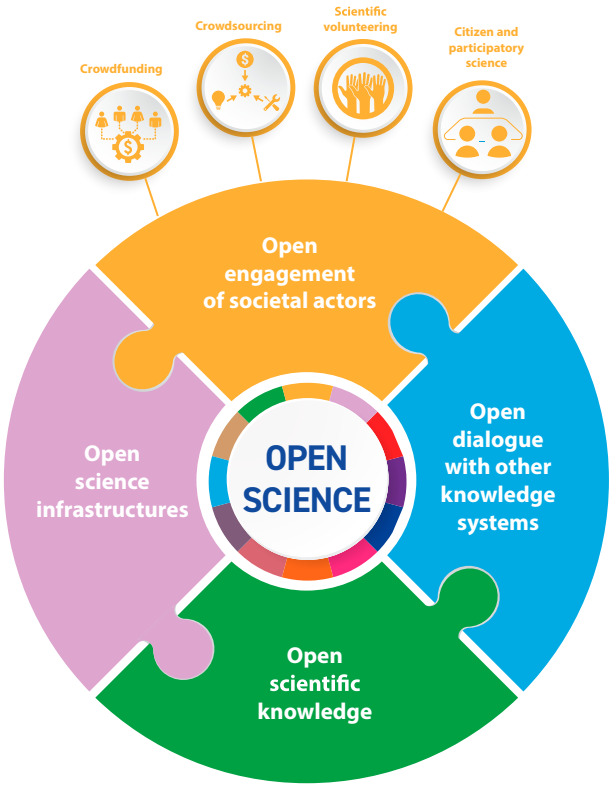
As part of the SSH CENTRE, we ran a Knowledge Brokerage Initiative whereby PhD and Early Career Researchers received training on Knowledge Brokerage, before working in teams to deliver a Knowledge Brokerage activity with a European city partner.

The links to Open Science provided through the Knowledge Brokerage Initiative, and how others can engage with Open Science through this means, are set out below.

What we did:

- Supported PhD and Early Career Researchers to undertake Knowledge Brokerage Initiatives in 6 European cities
- Designed flexible engagement formats to address the needs of the European cities
- Produced accessible materials based upon the engagement activities undertaken (https://sshcentre.eu/publications/)
- Framed engagement as ongoing dialogue rather than one-way communication

> ***"Communication should not be episodic but continuous. (...) One of the strengths of SSH is in curating the ongoing relationships that underpin transdisciplinary collaboration."***
>
> *(BN10, p.3-4)*



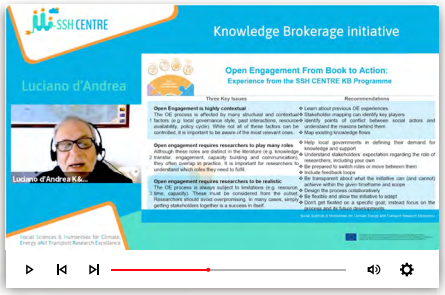
UNESCO, 2021

How others can replicate or remix:

- Complete our self-led, online course on Knowledge Brokerage (https://localtransitionslearning.eu/enrol/index.php?id=43)
- Use and adapt the resources we produced to support Knowledge Brokerage processes (https://sshcentre.eu/publications/)
- Embed knowledge brokerage into your impact and dissemination strategy

> ***"I also see Open Science as a way to make science more available to the general public, a way to make it more democratic so that it can reach anyone, you know, from any social or economic position. (...) If we make science more available, then even these people who usually do not think much of going for scientific or technological studies career, [then] they can think that they can actually do [that] in the future, if we are talking about younger children."***
>
> **(Participant in the Interdisciplinary Collaborations)**

Video 8: Stakeholder Collaboration through Knowledge Brokerage (Luciano d'Andrea, K&I)



This 8-minute video outlines the Knowledge Brokerage activities undertaken and their links to Open Science. You can watch it via this **link** or by scanning the QR code.

4.4. Regional Inclusion of Underrepresented Researchers

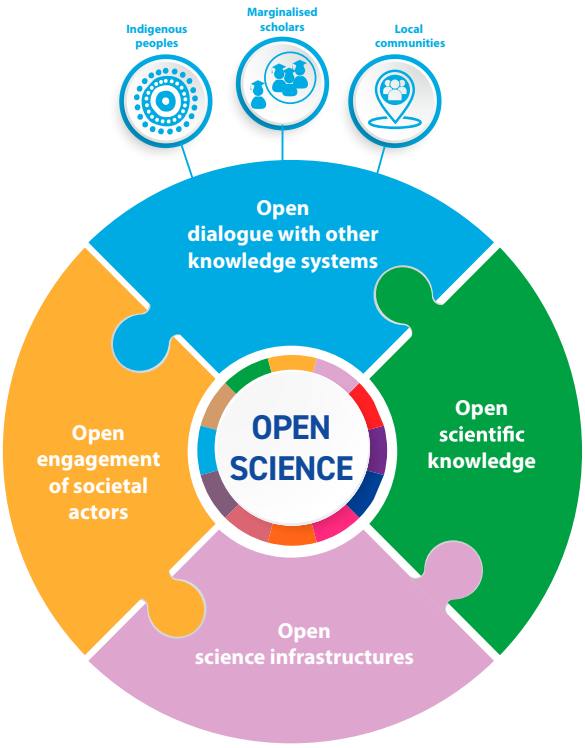
SSH CENTRE organised a call for evidence survey and hosted workshops in Southern (Bilbao) and Central Eastern Europe (Pecs) to better understand the experiences of researchers within these regions.

What we did:

- Developed a Position Statement on regional barriers based upon the experiences of researchers in Southern and Central Eastern Europe
- Translated key project outputs into 5+ languages
- Created open spaces for cross-cultural dialogue throughout the project, including during Consortium Meetings

How others can replicate or remix:

- Reference our Position Statement in your Open Science strategy and implement the recommendations presented
- Incorporate budget within projects to support the translation of materials, with this supporting more inclusive dissemination practices
- Consider different knowledge systems when designing engagement activities within projects

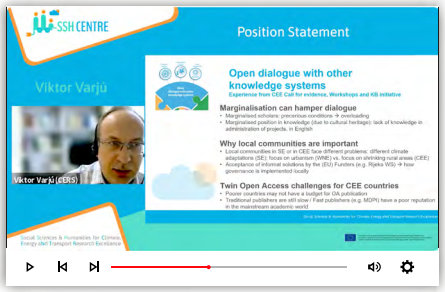


UNESCO, 2021

> *"It can be so expensive, especially [for] different countries [in] global south (...). It really makes it very difficult for a lot of countries to keep up if they have to pay for data"*
>
> (Participant in the Knowledge Brokerage Initiative)

Video 9: Regional Inclusion of Underrepresented Researchers (Viktor Varju, CERS)

This 6-minute video introduces the SSH CENTRE position statement. You can watch it via this **link** or by scanning the QR code.



5. Reflections and Learnings from Going Open

> *"It's not easy to do. I think there's a lot of systematic things that make the ambition hard to operationalize. But I think, you know, we are seeing slowly that the world is changing towards this and education can be done, for example, online or via registering for courses without taking a degree. So, this can be one way that we address these things apart from just our publication experiences and research."*
>
> (Participant in the Interdisciplinary Collaborations)

Often, and particularly at the end of projects, focus is placed on highlighting achievements and successes. Whilst this is important, there is also value in reflecting on other opportunities that emerged in relation to project activities, and what could have been undertaken had additional time and resources been available.

Here, we set out reflections related to Open Science practices across SSH CENTRE.

5.1. Zenodo & Open Data

- **What we noticed:** Not all deliverables were clearly licensed under CC terms.
- **Opportunities to do more:** Apply consistent CC licensing from the start to ensure legal clarity and reuse.
- **Lesson:** Open isn't open enough without clear permissions.

5.2. SSH Open Knowledge Platform

- **What we noticed:** Some resources could have been formatted differently to support easier remixing/revision.
- **Opportunities to do more:** Consider editable formats when planning project outputs (e.g. source files, modular toolkits).
- **Lesson:** Technical openness needs design and resourcing.

> *"For me, open science is the right to share and not being obliged to go through some organisations that reap a lot of money and benefits. So, it's the right to share and make this what I'm producing accessible and open to any."*
>
> (Participant in the Interdisciplinary Collaborations)

5.3. Knowledge Brokerage

- **What we noticed:** The methods used as part of the Knowledge Brokerage Initiatives could have synthesised in a document to support replication.
- **Opportunities to do more:** Support the documentation of research methods and experiences, with appropriate resourcing allocated for this.

- **Lesson:** Understanding the processes underpinning activities is as important as the outcomes/ outputs of activities.

5.4. Regional Inclusion

- **What we noticed:** There was interest amongst consortium members to support the contributions from different partners across project outputs.
- **Opportunities to do more:** Ensure opportunities for contributing to additional project outputs are shared, with different authorship opportunities available.
- **Lesson:** Inclusion means agency, not just access.

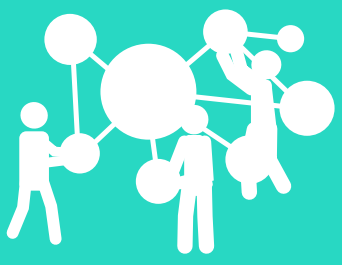
5.5. Stakeholder Engagement with Policy Recommendation Book Chapters

- **What we noticed:** Some book contributors were keen for further dissemination activities to be undertaken.
- **Opportunities to do more:** Provide opportunities (and resources) for individuals to undertake additional dissemination activities.
- **Lesson:** Impact doesn't end at publication—ongoing engagement and clear targeting amplify relevance and policy uptake.

Staying Open to Improvement

SSH CENTRE continues to learn. In our post-project phase, we'll keep refining how Open Social Science and Open Education are practiced — not just promoted. Because being open also means being open to change.

Let's keep learning, together.



6. Resources & Contacts

You can learn more about SSH CENTRE's experience of stakeholders engagement with interdisciplinary work, and communication processes within interdisciplinary projects, by reading our briefing notes (BNs):

Gerlich, V., Prášilová, T., Blanco, E., Leventon, J. 2025. Engaging stakeholders and audiences in inter- and transdisciplinary collaboration. In *Ten challenges for successful inter- and transdisciplinary collaboration: Briefing Note collection of SSH CENTRE*. Cambridge: SSH CENTRE. https://doi.org/10.5281/zenodo.17608088

Gerlich, V., Prášilová, T., Sorman, A.H., Cabello, V. Leventon, J. 2025. Spaces for communication in inter- and transdisciplinary collaboration. In *Ten challenges for successful inter- and transdisciplinary collaboration: Briefing Note collection of SSH CENTRE.* Cambridge: SSH CENTRE. https://doi.org/10.5281/zenodo.17608088

Gerlich, V., Prášilová, T., Heidenreich, S., Leventon, J. 2025. Balancing SSH and STEM contributions in inter- and transdisciplinary collaboration. In *Ten challenges for successful inter- and transdisciplinary collaboration: Briefing Note collection of SSH CENTRE.* Cambridge: SSH CENTRE. https://doi.org/10.5281/zenodo.17608088

If you want to know more about the SSH CENTRE project more generally, or our Open Science activities in particular, please see below:

- Website: SSH CENTRE – Social Sciences & Humanities for Climate, Energy aNd Transport Research Excellence
- SSH Open Knowledge Platform: SSH Open Knowledge platform – SSH CENTRE
- Contact for details about the SSH CENTRE project:
  - Prof Chris Foulds (chris.foulds@aru.ac.uk)
  - Prof Rosie Robison (rosie.robison@aru.ac.uk)
- Contact for details about SSH CENTRE's Open Science and Open Education activities:
  - Mojca Drevensek (mojca.drevensek@consensus.si)

During the project, SSH CENTRE interacted with the following Open Science and Open Education projects and networks in different ways, from interviews to informal exchanges and webinars:

SSH CENTRE

Social Sciences & Humanities for Climate, Energy aNd Transport Research Excellence

sshcentre.eu

This project has received funding from the European Union's Horizon Europe research and innovation programme under grant agreement No 101069529 and from UK Research and Innovation (UKRI) under the UK government's Horizon Europe funding guarantee [grant No 10038991].