



Institut
de Recerca^R
Sant Pau

HRS4R ACTION PLAN 2025-2028

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INDEX

1. IR Sant Pau context	3
2. Institutional progress through HRS4R	5
3. Internal review	6
3.1. Ethical and professional aspects	6
3.2. Recruitment and selection (OTM-R).....	9
3.3. Working conditions and social environment	11
3.4. Training and career development	14
4. Integration of the HRS4R and the C&C into Strategic Plan 25-30	15
5. Action plan 2025-2028.....	17
6. Monitoring and follow-up.....	18
7. Annexes.....	19

1. IR Sant Pau context

The Research Institute of Sant Pau Hospital (IR Sant Pau) established on June 4, 1992, is a scientific foundation, whose mission is to promote basic, clinical, epidemiological and healthcare research in the fields of health sciences and biomedicine. The main aims of IR Sant Pau are to improve people's health and quality of life through excellence in biomedical research and innovation.

IR Sant Pau is a biomedical research centre of excellence affiliated with the Autonomous University of Barcelona (UAB) since 2009 and a member of the Catalan Research Centres System (CERCA) since 2011. It is one of the most active biomedical research institutions in Catalonia, particularly in translational research and the transfer of scientific advances into clinical practice. Its research activity has generated dozens of patents and six biotech spin-offs.

It has 16,000 m² of facilities attached to the Hospital de Sant Pau, including a highly technological building designed with environmental sustainability criteria. This open-layout design brings together all research groups in a single collaborative environment, fostering communication, innovation, and interdisciplinary exchange. IR Sant Pau publishes more than 1,000 scientific articles annually in international journals and manages around 600 clinical drug trials.

The Sant Pau Research Institute, part of the Catalan System of Research Centres (CERCA), is a Biomedical Research Institute accredited by the Spanish Institute of Health Carlos III (ISCIII) since 2011. Comprising researchers from various institutions, its mission is to improve people's health and quality of life through excellence in biomedical research and innovation. Focused on translational research, it spans specialized clinical research, epidemiology, basic research, and teaching. With 1234 researchers, 55 accredited groups and 20 associated groups, and 5 strategic areas covering various diseases and disciplines, it aligns research with advanced therapies, precision medicine, and healthcare improvement, generating patents and biotech spin-offs. Its facilities include an environmentally sustainable building, facilitating collaboration and innovation.

Guided by its core values - integrity, commitment, creativity, and passion - IR Sant Pau continues to strengthen its position as a national and international reference in biomedical innovation.

In recent years, IR Sant Pau has undergone a period of financial adjustment. Following a deficit situation, the Institute developed and implemented a Sustainability Plan (2020-2024) designed to safeguard scientific excellence while ensuring economic viability.

This plan was fully aligned with the previous Strategic Plan (2019-2024), setting a clear roadmap toward long-term sustainability without compromising research quality.

The Sustainability Plan was structured around three strategic pillars:

- ▶ Increasing income generation through the promotion of new projects and strategic partnerships;



- ▶ Optimising existing resources to improve efficiency and financial management;
- ▶ Supporting key strategic investments essential to achieving institutional goals.

To meet these objectives, cross-disciplinary working groups were established and a monitoring dashboard was implemented. However, the financial restrictions introduced under the Sustainability Plan led to the postponement of certain Strategic Plan actions, particularly those related to talent attraction and intramural projects. As a result, short- and medium-term institutional priorities were reshaped by these constraints.

Despite these challenges, IR Sant Pau has continued to evolve structurally and strategically, creating new units and governance mechanisms that directly support the HRS4R process and strengthen the Institute's internal capacity:

- ▶ Creation of a dedicated Human Resources Department, independent from the hospital, focused on both administrative management and policy development (e.g., talent recruitment, gender equality, and career progression). This department has also defined job profiles, competencies, and responsibilities to enhance professional development.
- ▶ Creation of an International Projects Unit, aimed at boosting the Institute's ability to attract international funding and participate in global research consortia.
- ▶ Creation of the RRI (Responsible Research and Innovation) Unit, to lead the implementation of RRI principles and foster a culture of openness, ethics, and social responsibility.
- ▶ Strengthening of the communication structure and renewal of the institutional brand, improving visibility and cohesion across research groups.

IR Sant Pau is deeply committed to Open Science, Responsible Research and Innovation (RRI), and fair research assessment practices. Since the last interim assessment, the Institute has developed several new strategic frameworks, which have materialized in an RRI Plan, an Impact Strategy, and an Open Science Strategy, and has joined CoARA (Coalition for Advancing Research Assessment) with the aim of designing a new institutional research assessment policy based on impact.

All these new priorities and approaches are being integrated into the new Strategic Plan 2025–2030, which was developed during 2024 and is currently in the implementation phase. This new plan provides an ideal framework to integrate the principles of the European Charter for Researchers and the Code of Conduct (C&C), as well as the HRS4R Action Plan, ensuring that both are incorporated into the institutional roadmap rather than functioning as parallel initiatives.

The design of the Strategic Plan is collaborative and participatory, aiming to foster a sense of belonging, engagement, and commitment among all IR Sant Pau members. The process includes interviews, participatory sessions, and working groups covering all research areas and professional categories.



Ultimately, this transformative and collaborative strategic process will strengthen IR Sant Pau's ability to adopt not only the current principles of the C&C, but also its future revisions, particularly regarding responsible research assessment and modern research careers.

This alignment ensures that the HRS4R Strategy and Action Plan 2025–2028 remain a central pillar in the Institute's transformation and sustainable growth.

2. Institutional progress through HRS4R

Since receiving the HR Excellence in Research Award in 2015, IR Sant Pau has made significant progress in embedding the principles of the European Charter for Researchers and the Code of Conduct for the Recruitment of Researchers (C&C) into its institutional culture and management systems.

Over the last decade, the Institute has transitioned from initial alignment efforts to a comprehensive, organisation-wide integration of the HRS4R principles. This process has been characterised by structural renewal, leadership strengthening, and continuous improvement of research governance, transparency, and talent management.

Key Milestones and Institutional Transformation

The 2019–2024 period marked a significant phase of transformation for IR Sant Pau, characterized by strengthened infrastructures, governance reforms, and a renewed commitment to excellence, integrity, and responsible research. The main milestones include:

- ▶ **New infrastructure and leadership:** The inauguration of the new research building consolidated all research groups into a single collaborative environment, fostering communication, innovation, and environmental sustainability. The appointment of a new Scientific Director (2019) and a new Managing Director (2021) provided renewed strategic vision and reinforced institutional leadership.
- ▶ **Scientific and management restructuring:** Research areas were reorganised under the supervision of a new Scientific Advisory Board (SAB) to ensure coherence and strategic focus. The Management Support Area was restructured, creating the HR Unit and the RRI Unit, both pivotal to the implementation of the HRS4R strategy and responsible research governance (2022).
- ▶ **Governance and quality reinforcement:** IR Sant Pau successfully completed the ISCIII reaccreditation process, the CERCA institutional evaluation, and an internal HRS4R audit, which validated the progress achieved in human resources management and research ethics. Additionally, the Institute updated its information systems (FUNDANET), strengthening research project management, HR data tracking, and reporting capacity (2022). The system also enables a centralised internal repository for sharing key documents across the research community.



- ▶ Integrity and responsibility: The establishment of the Research Integrity Committee (CIR) and the appointment of an Ombudsperson formalised institutional mechanisms for promoting ethical behaviour, conflict resolution, and scientific integrity. The publication and dissemination of the Code of Good Research Practices further consolidated a culture of integrity, responsibility, and open communication (2024).
- ▶ Brand renewal and visibility: The Institute renewed its visual identity and communication strategy, strengthening its institutional brand and external visibility while fostering a shared sense of belonging among researchers and staff (2023).
- ▶ The institute has consolidated an innovation and knowledge transfer structure over the past five years, strengthening it with dedicated staff and established management processes.

These achievements demonstrate a solid and sustained institutional commitment to ethical research, researcher development, and continuous improvement.

More than a compliance exercise, HRS4R has become a strategic axis of IR Sant Pau's organisational development, a framework for promoting fair, transparent, and inclusive research careers and strengthening the institution's international competitiveness.

The 2025-2028 period builds on this strong foundation, moving beyond implementation toward a culture of impact and continuous evaluation, where progress is assessed not only through completed actions but through meaningful improvements in research culture, integrity, and well-being. This plan will be fully aligned with the Institute's new Strategic Plan, which focuses on the pillars of excellence, competitiveness, impact, internationalisation, and cultural transformation. The Strategic Plan places particular emphasis on talent attraction policies, career development pathways, and the recruitment of international talent.

3. Internal review

3.1. Ethical and professional aspects

Overview and Strengths:

IR Sant Pau has made substantial progress in promoting ethical conduct, integrity, and responsible research practices across all areas of activity. Several institutional structures and policies have been created or strengthened to ensure full alignment with national, European, and international standards.

- ▶ Ethical oversight:
The Institute benefits from robust governance through several committees that support, advise, and oversee ethical and scientific issues. The Ethical Clinical Research Committee (CEIm) and the Animal Experimentation Committee (CEEA) ensure compliance with ethical principles and scientific best practices in accordance with national and international regulations.



- ▶ **Renewal of the Ethical Clinical Research Committee:**
In 2023, the CEIC was renewed and expanded to include experts in digital health and medical technologies, reflecting the Institute's growing research in innovative and interdisciplinary fields.
- ▶ **Independent Ombudsperson:**
In 2022, Prof. Santaló was appointed as IR Sant Pau's Ombudsperson. A Professor of Cell Biology at UAB and member of several national ethics bodies, he acts as an independent mediator in cases of suspected misconduct or professional conflict. He ensures compliance with the Code of Good Research Practices and upholds the integrity of the Institute's research.
- ▶ **Creation of the Research Integrity Committee (CIR):**
Established in 2023, this independent advisory and mediating body handles cases of alleged misconduct and provides recommendations on integrity-related matters. Chaired by the Ombudsperson, it guarantees independence, confidentiality, and impartiality in all procedures.
- ▶ **Updated Code of Good Research Practices:**
The Code has been revised to align with the CERCA Code of Conduct and the European ALLEA framework, incorporating inclusive language, RRI principles, and legal and institutional updates. It serves as a cornerstone document for promoting research integrity and responsible conduct.
- ▶ **Whistleblower Channel (2023):**
A secure and confidential mechanism has been implemented, enabling staff to report possible breaches of integrity or regulatory violations anonymously, in line with EU Directive 2019/1937.
- ▶ **Transparency and Public Engagement:**
IR Sant Pau demonstrates its commitment to transparency by regularly publishing its annual scientific report, updating its website and social media channels, and promoting public engagement activities to bring science closer to society.

Impact Indicators

The implementation of these measures has led to tangible institutional improvements, as reflected in the following indicators:

- ▶ Document of Code of Good Practices in Research: https://www.recercasantpau.cat/wp-content/uploads/2025/02/CBPR_ENG_VF_MR_signat_signed.pdf
- ▶ Research Integrity Committee (CIR): Regulation CIR IR Sant Pau Document (https://www.recercasantpau.cat/wp-content/uploads/2025/02/Reglament-CIR-IR_vf_ENG_MR_AB_GU_GV_signed_signed.pdf) and Procedure in Cases of Suspected



Misconduct – IR Sant Pau (https://www.recercasantpau.cat/wp-content/uploads/2025/02/Procediment-en-casos-de-sospita-de-mala-conducta-IR_VF_CAT_MR_AB_GU_GV_signat-2_signed_signed.pdf)

- ▶ Nr: No formal misconduct cases have been recorded since the creation of the Research Integrity Committee, indicating effective early conflict resolution and increased preventive awareness.
- ▶ 100% of misconduct cases have been resolved before any formal complaint was filed.
- ▶ Two internal training sessions on research integrity and RRI are held each year, with the participation of around 100 researchers.
- ▶ Researcher Manual included in Onboarding process
- ▶ Intellectual Property Regulation updated and published:
<https://www.recercasantpau.cat/wp-content/uploads/2025/08/Normativa-de-Patents-IR-SANT-PAU.pdf>
- ▶ Over 50 citizen engagement activities annually, including educational projects.
- ▶ Number of participation of researchers in the different citizen engagement activities (80-100 researchers)

These results show a positive impact in promoting a culture of integrity, transparency, and responsibility within the IR Sant Pau community.

Weaknesses and areas for improvement:

Despite progress, several challenges remain:

- ▶ Limited internal awareness: Some staff members still lack detailed knowledge of the Charter and Code principles and related institutional policies.
- ▶ Communication gaps: Procedures and contractual obligations are not always communicated clearly to all staff.
- ▶ Need to train research staff in research integrity and ethics.
- ▶ Public engagement visibility: Although activities are frequent, broader communication and dissemination are needed to highlight the Institute's social commitment.

Future action lines

To consolidate progress and address remaining challenges, IR Sant Pau will implement the following actions under the new HRS4R Action Plan 2025–2028:

- ▶ Strengthen Awareness and Commitment to the European Charter for Researchers (C&C)→A2 Action Plan
Overall objective: Promote knowledge and practical implementation of the C&C principles among the research community.
- ▶ Improve Internal Communication and Accessibility to Institutional Policies and Regulations→A3 Action Plan



Overall objective: Ensure fluid communication and regulatory transparency within the research environment.

- ▶ Foster citizen participation in research → A4 Action Plan

Overall objective: Strengthen the link between science and society through active citizen involvement in research projects

- ▶ Implement the Compliance and Ethical Monitoring Unit → A5 Action Plan

Overall objective: Ensure responsible research through robust ethical oversight and regulatory compliance mechanisms

3.2. Recruitment and selection (OTM-R)

Overview and Strengths

IR Sant Pau is firmly committed to the principles of Open, Transparent, and Merit-Based Recruitment (OTM-R). Since 2019, the Institute has taken major steps to ensure fair hiring, equal opportunities, and diversity in all recruitment processes, consolidating a professional and inclusive HR framework aligned with the European Charter and Code. Key achievements include:

- ▶ Formalisation of OTM-R procedures:
IR Sant Pau has defined a transparent and standardised recruitment protocol that regulates all stages of the process — from advertisement to final appointment — ensuring equality, impartiality, and objectivity.
- ▶ Standardisation of evaluation criteria:
Clear, competence-based assessment grids have been introduced, emphasising merit, potential, and alignment with the Institute's values.
- ▶ Gender equality and diversity:
The Institute has promoted the incorporation of gender-balanced selection committees.
- ▶ Internal guidance materials:
The HR Unit developed an OTM-R Guide for Managers and Researchers, outlining responsibilities, evaluation criteria, and conflict-of-interest rules.

We also are actively promoting our capacity for talent attraction at all levels. For example, by:

- ▶ working together with the Autonomous University of Barcelona (UAB) in order to define a young talent recruitment policy.
- ▶ actively participating in the application for projects focused on I3 mobility to attract international, intersectoral and interdisciplinary talent, both postdoctoral grants and co-fund projects of the Marie Skłodowska Curie actions.



- ▶ Maintaining national and international programmes and policies, such as Ramon y Cajal Fellowships, Río Hortega Fellowships or Miquel Servet Fellowships.

Since 2021, IR Sant Pau has a new HR department. The unit was created within the organisation and not as an external body. The management of the HR issues and having HR professionals in house allowed us to develop and implement new HR policies, to offer a better specialised service, and to better align our HR strategy with the HRS4R.

The institute provide highly stimulating environment. The scientific structure with research areas and transversal programmes facilitates interdisciplinarity and collaboration amongst groups and research fields.

IR Sant Pau offers excellent facilities, good scientific services and supportive administration and research management offices. Also, we are currently working on a renewed collective labour agreement favourable to researchers (R1-R4).

Impact Indicators

- ▶ Percentage of vacancies publicly advertised on EURAXESS and national/international portals (>70%).
- ▶ Increased internationalisation: 25% of newly recruited postdoctoral researchers (R2) are from abroad.
- ▶ All open calls include transparent scoring criteria and public resolution.
- ▶ Number of researchers attracted through national and international competitive programmes.
- ▶ Personnel recruitment and selection policy based on the EU OTM-R strategy: https://www.recercasantpau.cat/wp-content/uploads/2016/04/Human-resources-policy_V1.pdf

These figures confirm the Institute's steady progress towards the full implementation of OTM-R principles and a more competitive, inclusive recruitment culture.

Weaknesses and areas for improvement:

Despite the significant progress made in recent years, several challenges remain in relation to OTM-R practices and HR structures:

- ▶ The HR Department, created internally in 2021, has enabled the implementation of policies aligned with the HRS4R strategy. However, as a recently established unit, several processes are still being consolidated and require further refinement and professionalisation.
- ▶ Research opportunities are not published on EURAXESS or other international platforms, resulting in limited international visibility. A broader and more strategic outreach approach is needed to attract a wider and more diverse pool of candidates.
- ▶ A structured onboarding programme was introduced in 2023, but its implementation still needs to be strengthened to ensure a standardised and fully supportive integration of new staff.



- ▶ Beyond progress in gender equality, broader inclusion and diversity policies (e.g., disability, cultural diversity, LGTBQ+, socioeconomic background) are still insufficiently developed and require further action.
- ▶ Recruitment and performance assessment practices are not yet fully aligned with emerging European standards for fair and responsible research assessment, particularly regarding qualitative evaluation and responsible use of metrics.
- ▶ Local and national regulations affecting public institutions—such as language requirements and recognition of qualifications—continue to create barriers to hiring and retaining international researchers.
- ▶ Research assessment practices are not yet fully aligned with emerging European standards. Current evaluation systems still need to adapt to the principles of fair and responsible research assessment (e.g., CoARA), especially regarding qualitative evaluation, the responsible use of metrics, and the recognition of a broader range of research contributions.

Future action lines

To consolidate progress and address remaining challenges, IR Sant Pau will implement the following actions under the new HRS4R Action Plan 2025–2028:

- ▶ Improve recruitment procedures based on OTM-R principles→A6 Action Plan
Overall objective: Align recruitment practices with European standards of transparency, merit, and equity.
- ▶ Design an institutional talent attraction policy→A7 Action Plan
Overall objective: Establish a clear and sustainable strategy to attract national and international talent, including specific measures aimed at enhancing international recruitment.

3.3. Working conditions and social environment

Overview and Strengths

IR Sant Pau has consolidated significant progress in recent years toward establishing a robust and supportive working environment for researchers. Improvements in governance, professionalization of support units, definition of career structures, and enhanced infrastructures have contributed to greater transparency, efficiency and opportunities for professional growth. These strengths form a solid foundation on which to advance the institute's scientific career framework and its commitment to excellence.

- ▶ Renewed collective labour agreement.
IR Sant Pau is developing a new collective labour agreement that reinforces the research career structure (R1–R4) and promotes employment stability through institutional co-funding mechanisms.



- ▶ Clear job categories and career profiles.
The definition of structured job categories and career profiles increases transparency, equity, and predictability in professional development.
- ▶ High-quality facilities and scientific services.
The institute offers excellent research facilities and accredited scientific services that meet national and European quality standards.
- ▶ Strong research management and administrative support.
Professionalised administration and research management units provide strategic planning and comprehensive support throughout the research lifecycle.
- ▶ Flexibility and work–life balance.
Teleworking conditions implemented in several areas encourage more adaptable working arrangements.
- ▶ Opportunities for professional growth.
Active involvement in translational and collaborative research expands researchers' professional horizons and strengthens connections with industry and academic partners.

Impact Indicators

- ▶ Increase in the number of researchers with stable contracts (R1–R4).
- ▶ Percentage of staff with access to teleworking or flexible arrangements.
- ▶ Number of researchers receiving training annually (technical, transversal, ethics, RRI).
- ▶ Increase in participation in leadership, mentoring, and career development programmes.
- ▶ Number of incoming and outgoing mobility experiences supported.
- ▶ Increase in international researchers employed at the institute.

Weaknesses and areas for improvement:

Despite notable advancements, IR Sant Pau continues to face structural challenges that affect its competitiveness and organisational culture. Limitations in salary competitiveness, internal communication gaps, the need for improved shared spaces, and the lack of fully established career development pathways highlight important areas for improvement. Addressing these weaknesses is essential to enhancing talent attraction, strengthening internal cohesion, and ensuring a supportive work environment for all researchers.

- ▶ Limited attraction of international talent.



Current salary scales and remuneration packages remain less competitive for attracting international researchers. The dependence on competitive funding also hinders long-term stability.

- ▶ Internal communication and engagement challenges.
A limited sense of institutional belonging results in low participation in decision-making processes and indicates room for improvement in workplace culture.
- ▶ Career development pathways still under construction.
Although job categories have been defined, further work is needed to establish structured career development pathways that support talent retention and attraction.
- ▶ Modification of labour agreement still in progress.
The renewed collective labour agreement is under development and will be essential to reinforce the scientific career perspective (R1–R4).
- ▶ There is a need to improve overall working conditions, strengthen occupational risk prevention and workplace health measures, and provide clearer and more accessible information about the social benefits available to staff.

Future action lines

Objective: Improve competitiveness and stability, and strengthen engagement and institutional culture

- ▶ Design and implement professional development and career evaluation processes for research staff → A8 Action Plan
Overall objective: Consolidate a fair, transparent, and development-oriented evaluation system for researchers
- ▶ Design and implement professional development and career evaluation processes for management and technical staff → A9 Action Plan
Overall objective: Establish a competence-based, performance-driven and continuous-learning professional development model for technical and administrative staff.
- ▶ Implement occupational risk prevention measures → A12 Action Plan
Overall objective: Ensure a safe, healthy, and fully compliant working environment for all research staff.
- ▶ Implement the new Equality Plan 2025–2029 → A13 Action Plan
Overall objective: Consolidate gender equality, diversity, inclusion, and non-discrimination within the research environment.
- ▶ Improve working conditions and promote staff well-being → A14 Action Plan



Overall objective: Enhance overall quality of working life by strengthening work-life balance measures, well-being initiatives, and a supportive and inclusive research environment.

3.4. Training and career development

Overview and Strengths

IR Sant Pau has progressively strengthened its training and development ecosystem through a structured Annual Training Plan designed to address the evolving needs of its research and support personnel. This plan is coordinated and monitored by the Training Committee and ensures both scientific and transversal skills development across all career stages.

- ▶ Annual Training Plan based on needs assessment.
The institute designs an Annual Training Plan for all personnel informed by the identification of training needs. The Training Committee monitors implementation and ensures relevance and quality.
- ▶ Varied training offer aligned with institutional priorities.
The plan includes:
 - Specific training requested by personnel to fulfil essential job functions.
 - Transversal training defined by institutional leadership, addressing areas such as innovation, international projects, and open data.
 - Mandatory training required for safe and compliant performance of certain roles (e.g., Animal Housing Service).
- ▶ Strengthened HR training capacity.
Since 2023, the institute has incorporated a dedicated training officer within the HR Unit to ensure effective planning, implementation, and responsiveness to staff needs.

Impact Indicators (2019–2024)

To track progress and measure the effectiveness of training and development initiatives, IR Sant Pau may use the following KPIs:

- ▶ Training coverage: % of staff participating in at least one training activity per year.
- ▶ Training volume: Number of courses offered annually, by category (mandatory, transversal, specific).
- ▶ Alignment with needs: % of training requests attended or incorporated into the plan.
- ▶ Career-stage relevance: Distribution of training activities tailored to R1–R4 levels.



Weaknesses and areas for improvement:

Despite progress, several challenges persist:

- ▶ Lack of a Career Development Plan.
IR Sant Pau does not yet have a defined Career Development framework aligned with the R1–R4 researcher pathway. Consequently, the Annual Training Plan cannot be fully aligned with career-stage needs.
- ▶ Limited support for emerging groups and early-stage researchers.
There is no structured programme providing tailored training, mentoring, or guidance to newly formed research groups or beginning researchers.
- ▶ Absence of training impact assessment.
Training activities are not evaluated in terms of long-term impact, practical application, or contribution to institutional goals. This limits evidence-based improvement and prioritisation.
- ▶ Need to consolidate the role of the training officer.
Although a new training officer has been hired, the full potential of this role in shaping strategic career development has not yet been realised.

Future action lines

To reinforce the training and development strategy and align it with the HRS4R principles, IR Sant Pau will implement the following actions:

- ▶ Improve the supervision of doctoral and postdoctoral researchers → A10 Action Plan
Overall objective: Strengthen the quality of guidance, support, and supervision provided to early-career researchers.
- ▶ Design and implement a training plan for early-career researchers → A11 Action Plan
Overall objective: Promote the professional and personal development of early-career researchers through structured guidance, tailored training, and leadership skills development.

4. Integration of the HRS4R and the C&C into Strategic Plan 25-30

IR Sant Pau is currently implementing its new Strategic Plan 2025-2030, which defines the institutional mission of improving people's health and quality of life through excellence in biomedical research and innovation, and outlines the vision of becoming an international leader in translational research. The values that guide this strategy, rooted in creativity, passion, commitment and integrity, provide a strong foundation for embedding the principles of the European Charter & Code for Researchers (C&C) and the HRS4R Action Plan into the long-term development of the Institute.



The launch of the new Strategic Plan offers a unique opportunity to ensure that the C&C principles are fully integrated into the institutional roadmap for the coming years. Aligning HRS4R with the Strategic Plan reinforces a research culture based on excellence, responsibility, equity and global competitiveness, ensuring that HRS4R is not a separate initiative but a core dimension of the Institute's strategic direction.

The Strategic Plan is organised into five pillars, each of which naturally connects with the priorities of HRS4R and the C&C.

The first pillar, Excellence, focuses on strengthening distinctive research lines, implementing a new model for evaluation and resource allocation and reinforcing Responsible Research and Innovation. It incorporates commitments in Open Science, gender equality, citizen and patient participation, clinical research and regulatory compliance. These areas are directly aligned with C&C principles relating to scientific integrity, good research practices, supervision, evaluation and societal engagement.

The second pillar, Competitiveness, aims to expand talent, research spaces, scientific platforms and financial sustainability. This direction resonates with HRS4R actions related to OTM-R practices, talent attraction, career development pathways, working conditions and the creation of high-quality, efficient research environments.

The third pillar, Impact, promotes the generation of clinical, social, economic, cultural and policy value through responsible and DORA-aligned research assessment, broader outreach, innovation and knowledge transfer. This pillar reflects C&C principles concerning dissemination of results, responsible exploitation, Open Science, qualitative research assessment and contribution to society.

The fourth pillar, Internationalisation, seeks to enhance global visibility, increase participation in international projects, strengthen mobility opportunities and consolidate strategic partnerships and the recruitment of international talent. These goals align with C&C principles related to transparent recruitment, recognition of mobility, equal opportunities and international career development.

The fifth pillar, Cultural Transformation, aims to strengthen organisational culture, improve coordination within the Sant Pau ecosystem, foster research in underrepresented clinical areas, modernise internal structures and enhance the sense of belonging. This is closely connected to C&C principles concerning working conditions, research environment, professional development, diversity, internal communication and quality of support services.

Integrating HRS4R within these strategic pillars ensures that IR Sant Pau fully incorporates both the current and updated C&C principles. This includes key elements such as Open Science, research integrity, gender equality, responsible research assessment, talent attraction and development and the creation of an inclusive and supportive working environment. Such alignment reinforces the Institute's long-term commitment to responsible, competitive and impactful research, strengthening its position as an international reference in translational biomedical science.

5. Action plan 2025-2028

The development of the HRS4R Action Plan 2025–2028 follows a structured, participatory and evidence-based methodology that fully adheres to the requirements of the European Commission and reflects the institutional context of IR Sant Pau. The process begins with an extensive internal gap analysis, during which the Institute reviews its policies, procedures and practices across all areas relevant to the Human Resources Strategy for Researchers. This diagnostic phase examines recruitment and OTM-R practices, ethics and research integrity frameworks, training and supervision, career development pathways, working conditions, equality and inclusion policies, Open Science practices, and the effectiveness of support and governance structures. The assessment is carried out using the 40 principles of the European Charter & Code for Researchers as the central reference framework.

The results of this gap analysis allow the Institute to identify both strengths and areas requiring improvement across the four official HRS4R pillars: ethical and professional aspects, recruitment and selection, working conditions and social environment, and training and career development. These findings form the basis for prioritising institutional needs and defining the actions included in the new Action Plan.

The design of the Action Plan is carried out through a highly participatory process. Throughout its preparation, the Institute engaged group leaders, research area coordinators and researchers at all career stages (R1 to R4). The process also incorporated contributions from transversal institutional units, including Human Resources, the Research Integrity Committee, the Equality Committee, the Training Unit, the Knowledge Management Unit, International Projects Office, Communication Unit and Quality Unit. In parallel, the definition of actions has been closely aligned with the new institutional Strategic Plan 2025-2030, which was itself developed through a similar participatory and collaborative approach. This ensures that the proposed actions are not only aligned with the Charter & Code but also fully integrated into the Institute's broader strategic goals, and that they respond to real and current institutional needs.

Each action in the Plan is formulated according to the structure required by the European Commission. Actions include a general objective, a specific operational action, clearly defined indicators (KPIs), expected deliverables, responsible units, a detailed timeline organised by quarter and year, and explicit linkage to the relevant principles of the Charter & Code. All action proposals are consolidated into the final HRS4R Action Plan 2025–2028.

Before its approval, the draft Action Plan undergoes an internal review process involving several institutional bodies. The Scientific Direction, Human Resources Department, Research Integrity Committee, Equality Committee, Training Unit, Communication Unit and Quality Unit evaluate the coherence, feasibility and alignment of the proposed actions. This collective review ensures that the plan is robust, realistic and institutionally supported.



Finally, the Action Plan is formally approved by the Scientific Direction, the General Manager, the Legal and Human Resources Direction, the Communication Direction and the Research and Innovation Manager. Together, these bodies constitute the formal governance authority responsible for endorsing and validating the implementation of the HRS4R strategy within the Institute. Their approval marks the official institutional commitment to executing the 2025–2028 Action Plan and sustaining the continuous improvement of research human resources practices in alignment with European standards.

6. Monitoring and follow-up

The implementation of this strategy is overseen by the Institute's Steering Committee. To support the monitoring of the Action Plan, a dedicated Working Group has been established, composed of members of the management team and research staff. This group is responsible for reporting on the implementation status of the HRS4R Action Plan and systematically monitoring its progress.

The Monitoring Working Group agreed on the following core responsibilities:

- ▶ Provide strategic advice and guidance throughout the implementation of the Plan.
- ▶ Propose initiatives that strengthen the Action Plan and improve internal procedures.
- ▶ Monitor and supervise progress in the implementation of each planned action.

The members of the Monitoring Working Group are:

- Miriam Ors (Deputy Scientific Director and Innovation Director)
- Laura Díaz (Communications Director)
- Silvia Ribas (Director of Legal Advisory)
- Marta Mitjà (Head of Quality Assurance Unit)
- M^aRosa Ballester (Head of RRI Unit)
- Mònica Velasco (Responsible of Training Plan)
- Inés Perez (Health & Safety and Biosecurity Area)
- Gisele Domenech (HR Unit)
- M^a José Bartolomé (Scientific Secretariat Coordinator)
- Mercedes Camacho (R3-Researcher)
- Eduard Gallardo (R3-Researcher)

Other committees and transversal units are also involved in the implementation process, depending on the nature of the action or the expertise required (e.g., HR, Equality Committee, Research Integrity Committee, Knowledge Management Unit, International Projects, etc.).

The monitoring of the HRS4R implementation will be carried out through the Action Plan, with a minimum of three steering meetings per year. During these meetings, the Committee will review the timeline, analyse progress and assess the impact of actions using the established KPIs.

The following documents form the core of the monitoring framework and will be updated regularly as part of the Committee's meetings:

- ▶ HRS4R Action Plan 2025–2028
- ▶ Implementation timeline (Gantt chart)
- ▶ KPI Dashboard

Through this governance structure, the monitoring of the HRS4R Action Plan is fully integrated into the Institute's leadership framework, ensuring coherence with institutional objectives and effective alignment with the new Strategic Plan 2025-2030, currently under development.

7. Annexes

I. HRS4R Action Plan 2025–2028

II. Timeline

III. KPI Dashboard

IV. OTM-R Check-list

OVERALL ACTIONS	C&C	SPECIFIC ACTIONS	KPIs	DELIVERABLES	Responsible	Timing
A1. Enhance institutional visibility and positioning in the European Union to attract talent Overall objective: Strengthen international visibility and institutional reputation to attract excellent researchers and increase competitiveness at the European level.	ALL	A1.1: Include the HRS4R logo on the homepage with a hyperlink to a dedicated certification information section		Updated homepage featuring HRS4R logo and link HRS4R information microsite	Communication	Q4/2025
		A1.2: Improve the dedicated HRS4R web section to enhance clarity and accessibility		HRS4R webpage integrated into the institutional website Updated content repository (Action Plan, policies, KPIs)	Communication	Q4/2025
		A1.3: Improve the design, structure and content of the institutional website.	Number of visits to the HRS4R information page	New institutional website Communication and dissemination plan	Communication	Q1/2026
A2. Strengthen Awareness and Commitment to the European Charter for Researchers (C&C) Overall objective: Promote knowledge and practical implementation of the C&C principles among the research community.	ALL	A2.1: Systematically involve researchers in the HRS4R process	Number of researchers participating in the steering committee (minimum 2)		Coordination	Q1/2026
		A2.2: Disseminate periodic information through the internal newsletter	5 news/year	HRS4R webpage integrated into the institutional website	Communication	Q4/2026
		A2.3: Conduct a biennial survey to assess awareness and compliance with the principles	Definition of KPIs based on survey results	Updated content repository (Action Plan, policies, KPIs)	Coordinations and working group	Q2-Q4/2026
		A2.4: Include annual training sessions on C&C principles in the continuous training plan	Minimum 2 training sessions At least 100 researchers trained	Annual Training Plan	Training department	Q4/2026
A3. Improve Internal Communication and Accessibility to Institutional Policies and Regulations Overall objective: Ensure fluid communication and regulatory transparency within the research environment.	2 Ethical principles 3 Professional responsibility 4 Professional attitude 5 Contractual and legal obligations 6 Accountability 7 Good practice in research	A3.1: Develop new internal policies in a clear, accessible and transparent manner	Number of new policies published. Monitoring will be adapted to identified needs	List of pending policies Policy development plan Communication and dissemination plan	Management	Q2/2026
		A3.2: Maintain an updated internal repository with all related to research policies and regulations		i-Fundanet	Communication	Q1/2026
		A3.3: Implement a new intranet to improve internal communication		New intranet	Communication	Q4/2027
A4. Foster citizen participation in research Overall objective: Strengthen the link between science and society through active citizen involvement in research projects.	7 Good practice in research 9 Public engagement	A4.1: Engage more researchers in the institute's citizen-participation activities	Number of researchers participating in public engagement activities (baseline 2024: 80)	Presentation at the area meetings with group leaders and other PI's.	Communication	Q4/2025-Q4/2026
		A4.2: Identify new forums and platforms to expand public participation in research projects	Number of new forums/platforms implemented or collaborations established.	Development and approval of a Patient Involvement Plan for research projects.	Scientific Direction	Q4/2027
A5. Implement the Compliance and Ethical Monitoring Unit Overall objective: Ensure responsible research through robust ethical oversight and regulatory compliance mechanisms	5 Contractual and legal obligations 6 Accountability 7 Good practice in research	A5.1: Define compliance indicators, monitoring procedures, and periodic analysis	Set of compliance KPIs formally approved Number of compliance reports produced per year	Compliance Indicators Framework (document) Annual Compliance Monitoring Report	Compliance Unit	Q4/2026
		A5.2: Internal training to communicate actions performed in ethics and compliance	Number of staff trained per year Number of training sessions delivered		Compliance Unit	Q4/2026
		A5.3: Develop and implement mediation and conflict-resolution protocols	Protocol approved and implemented Number of conflict-resolution cases supported Time to resolution of internal conflicts	Mediation and Conflict-Resolution Protocol	Compliance Unit	Q4/2026
		A5.4: Draft and implement the Digital Disconnection Protocol	Digital Disconnection Protocol approved.	Digital Disconnection Protocol Internal dissemination plan and communication materials	Compliance Unit	Q4/2025
		A5.5: Define a prevention and response protocol for sexual harassment, gender-based harassment, and LGBTBI discrimination	Protocol approved and published Number of reported cases (monitored annually)	Protocol for the Prevention and Response to Sexual and Gender-Based Harassment and LGBTBI Discrimination	HR Unit	Q4/2025
A6. Improve recruitment procedures based on OTM-R principles Overall objective: Align recruitment practices with European standards of transparency, merit, and equity	12 Recruitment 13 Recruitment (Code) 14 Selection (Code) 15 Transparency (Code) 16 Judging merit (Code)	A6.1: Strengthen internal communication on OTM-R practices through a specific internal instruction addressed to all staff involved in recruitment	Number of staff trained on OTM-R principles Percentage of recruitment processes aligned with the instruction	OTM-R internal instruction approved and disseminated	HR Unit	Q2/2026
		A6.2: Publish all job offers on EURAXESS and enhance their dissemination on additional platforms	Number of job offers published on EURAXESS (annual) % of research-related job posts disseminated through at least two platforms Increase in international applications received		HR Unit	Q4/2025
		A6.3: Improve the onboarding process for research staff	Satisfaction score of new researchers after 3 months Percentage of new staff completing the onboarding programme	Updated Onboarding Guide Checklist and welcome pack for new research staff	HR/Communication	Q2/2026
		A6.4: Design and implement a digital tool for recruitment and training processes (Microsoft 365-based)	Reduction in administrative time for recruitment workflows Number of training processes managed through the tool	Technical specification document (Phase 1) Talent & Training digital platform (Phase 2)	HR/Training/IT	Q1/2027 Q1/2028
A7. Design an institutional talent attraction policy Overall objective: Establish a clear and sustainable strategy to attract national and international talent, including specific measures aimed at enhancing international recruitment.	12 Recruitment 13 Recruitment (Code) 14 Selection (Code) 15 Transparency (Code) 18 Recognition of mobility experience (Code) 19 Recognition of	A7.1: Define the institutional Talent Attraction Policy.	Number of researchers recruited annually Number of international researchers recruited	Talent Attraction Policy	Scientific Direction/HR	4Q/2026
		A7.2: Establish a dedicated office to support internationalisation and the recruitment of international talent.	Number of international researchers attracted Service satisfaction survey results (to be defined)	International Talent Office / Officer Annual service satisfaction report	Scientific Direction/HR	2Q/2026

OVERALL ACTIONS	C&C	SPECIFIC ACTIONS	KPIs	DELIVERABLES	Responsible	Timing
	qualifications (Code) 22 Recognition of the profession	A7.3: Benchmark talent attraction policies with other CERCA centres		Talent Attraction Benchmarking Report	Scientific Direction/HR	2Q/2026
A8. Design and implement professional development and career evaluation processes for research staff Overall objective: Consolidate a fair, transparent, and development-oriented evaluation system for researchers	28 Career development 30 Access to career advice	A8.1: Define new quantitative and qualitative evaluation indicators (scientific output, leadership, knowledge transfer, mentoring, impact, etc.)	Number of indicators incorporated (quantitative and qualitative) % of research groups using the new evaluation grid	New Evaluation Indicators Framework	Scientific Direction	1Q/2026
		A8.2: Review the promotion and professional development policy and integrate the evaluation process using the new indicators	Number of researchers evaluated annually Number of professionals promoted based on the updated criteria	Revised Career Development and Promotion Policy incorporating the new indicators	Scientific Direction	4Q/2027
A9. Design and implement professional development and career evaluation processes for management and technical staff Overall objective: Establish a competence-based, performance-driven and continuous-learning professional development model for technical and administrative staff	28 Career development 30 Access to career advice	A9.1: Define a career structure and professional levels for management and technical staff	Number of staff assigned to a defined professional level	Career Structure and Professional Levels Document	Management	4Q/2026
		A9.2: Establish an annual performance evaluation system with clear objectives and structured feedback	Percentage of staff evaluated annually	Annual Performance Evaluation System	Management	4Q/2026
		A9.3: Design training pathways and internal promotion itineraries	Number of training pathways defined Number of staff completing training itineraries	Training and Internal Promotion Pathways Framework	Management	4Q/2027
A10. Improve the supervision of doctoral and postdoctoral researchers Overall objective: Strengthen the quality of guidance, support, and supervision provided to early-career researchers.	27 Supervision 28. Career development 37. Supervision and managerial duties 30. Access to career advice 39. Training and development	A10.1: Define a procedure to verify the quality and progress of supervision for PhD candidates and postdoctoral researchers.	Number of researchers completing a PhD	Annual supervision survey	Scientific Direction/Senior Researchers	Q4/2026
		A10.2: Integrate structured supervision into the institutional mentoring programme.	Number of interviews or mentoring meetings conducted		Scientific Direction/Senior Researchers	Q4/2026
A11. Design and implement a training plan for early-career researchers Overall objective: Promote the professional and personal development of early-career researchers through structured guidance, tailored training, and leadership skills development.	28 Career development 30 Access to career advice 39 Training and development 38 Continuing Professional Development 37 Supervision and managerial duties	A11.1: Define a support and follow-up plan for R1 researchers (predoctoral stage).	Number of predoctoral researchers following the itinerary.	R1 Training and Support Itinerary	HR / Training Unit / Scientific Direction	4Q/2026
		A11.2: Provide leadership training for emerging group leaders (future IPs)	Number of researchers trained.	Leadership Training Programme for Emerging PIs	HR / Training Unit / Scientific Direction	4Q/2026
A12. Implement occupational risk prevention measures Overall objective: Ensure a safe, healthy, and fully compliant working environment for all research staff.	23 Research environment 24 Working conditions	A12.1: Review and update the Occupational Risk Prevention Plan	%Implemented preventive actions (annual programme)	Occupational Risk Prevention Audit Report Annual Prevention Programme	Health & Safety Unit / Management	1Q/2026
		A12.2: Conduct psychosocial risk surveys and develop corresponding action plans	% Respostes enquesta Number of actions implemented	Psychosocial Risk Assessment Report Action Plan Derived from Survey Results	Health & Safety Unit / HR	3Q/2026
A13. Implement the new Equality Plan 2025–2029 Overall objective: Consolidate gender equality, diversity, inclusion, and non-discrimination within the research environment.	27 Gender balance 10 Non-discrimination 24 Working conditions 34 Complaints and appeals 35 Participation in decision-making bodies 4 Professional attitude	A13.1: Monitoring and implementing the actions defined in the Equality Plan	Number of actions implemented	Annual monitoring report	Equality Plan Committee	Q4/2025-Q4/2028
		A13.2: Disseminate the Equality Plan and ensure institutional communication	Number of communication actions carried out		Equality Plan Committee/ Communication	1Q/2026
		A13.3: Open a permanent call for suggestions and feedback on equality and diversity	Number of suggestions received Number of suggestions incorporated into actions.		Equality Plan Committee/ Communication	3Q/2026
		A13.4: Promote awareness and dissemination of work-life balance rights (permits, flexibility, co-responsibility).	Number of dissemination actions.		HR	4Q/2026
		A13.5: Create an inclusive environment for all groups (gender, LGBTBI+, disability, cultural diversity) with dedicated awareness actions and campaigns.	Number of inclusion activities New collaborations established.	Collaboration agreement with PRISMA, LGBTBI+ networks, and diversity organisations	HR	1Q/2027
		A13.6: Update and strengthen the protocol against sexual harassment and harassment based on sex.	Number of cases attended/resolved (confidential and anonymised).	Protocol updated and published.	HR	1Q/2026
		A13.7: Provide mandatory training for managers and supervisors on harassment prevention and equality mainstreaming.	Number of managers trained.		HR	2Q/2026
		A13.8: Develop a practical guide for the prevention and management of gender-based violence		Guide published	HR	4Q/2027
A14. Improve working conditions and promote staff well-being Overall objective: Enhance overall quality of working life by strengthening working conditions, well-being initiatives, and a supportive and inclusive research environment.	24 Working conditions 23 Research environment	A14.1: Approve the new labour agreement.		New Collective Labour Agreement	HR / Management	3Q/2026
		A14.2: Define a portfolio of social benefits and establish eligibility criteria	Number of benefits included in the portfolio % of staff accessing at least one benefit	Social Benefits Portfolio Communication campaign	HR / Management	4Q/2026
		A14.3: Study and implement improvements in working spaces.Number of spaces renovated or improved	Number of spaces renovated or improved	Workspace Improvement Plan Report on renovations in Open Space –2	General Services / Management	4Q/2026
		A14.4: Conduct comparative salary studies with other CERCA centres and sectoral agreements.	Salary benchmarking report completed Identified gaps and recommendations Improvements implemented following the analysis	Salary Benchmarking Report (CERCA + sector agreements)	HR / Management	2Q/2027
		A14.5: Implement healthy habits sessions (mindfulness, stress management, well-being, mental health).	Number of well-being sessions delivered Staff participation rate		HR / Training Unit / Health & Safety Unit	4Q/2026

OVERALL ACTIONS	C&C	SPECIFIC ACTIONS	KPIs	DELIVERABLES	Responsible	Timing
		A14.7: Create a breastfeeding/lactation room.	Number of staff using the facility	Breastfeeding/Lactation Room	General Services / HR / Health & Safety Unit	2Q/2028
A15: Update and disseminate the Open Science policy Overall objective: Promote transparency, accessibility, and responsible management of scientific outputs in alignment with European Open Science principles	6 Accountability 7 Good practice in research 8 Dissemination and exploitation of results 31 Intellectual property rights 32 Co-authorship	A15.1: Develop the institutional Open Science policy	%Open Publications	Open Science Policy Document	Scientific Direction/Knowledge Unit	4Q/2025
		A15.2: Develop an institutional Data Management Plan (DMP) framework.	DMP template developed and approved Number of projects adopting the institutional DMP Number of researchers trained in data management	Institutional DMP Framework DMP template and guidelines	Scientific Direction/Knowledge Unit	2Q/2026-2Q/2027
		A15.3: Provide at least two annual training sessions on Open Science.	Number of trainings delivered annually (target ≥ 2) Number of researchers trained Number of datasets made openly available (open data)	Annual Training Report on Open Science	Scientific Direction/Knowledge Unit/Training Unit	Q4/2026
		A15.4 Data Management plan elaboration support service launched.	Number of DMP supported		Scientific Direction/Knowledge Unit	3Q/2025
A16: Strength awareness, commitment and implementation of NEW Charter & Code criteria Overall objective: It is essential to maintain the commitment and implementation of the Charter & Code, adapting the actions to the new Charter and Code for Researchers, taking into account Open Science, Integrity, Gender...	ALL	A16.1 Gap analysis with the new Charter & Code principles		Gap Analysis Report (New C&C)	HRSR Committee	3Q/2026
		A16.2 Update the Action Plan incorporating new principles and requirements.		Updated HRS4R Action Plan 2026–2029	HRSR Committee	4Q/2026

ANNEX II. Timeline

ACTIONS		2025				2026				2027				2028			
		Q1	Q2	Q3	Q4												
	A14.5: Implement healthy habits sessions (mindfulness, stress management, well-being, mental health).																
	A14.7: Create a breastfeeding/lactation room.																
A15	A15.1: Develop the institutional Open Science policy																
	A15.2: Develop an institutional Data Management Plan (DMP) framework.																
	A15.3: Provide at least two annual training sessions on Open Science.																
	A15.4 Data Management plan elaboration support service launched.																
A16	A16.1 Gap analysis with the new Charter & Code principles																
	A16.2 Update the Action Plan incorporating new principles and requirements.																

ANNEX III. KPI Dashboard

KPI	2025	2026	Target	Responsible	Frecuency	Comments
Number of formal misconduct cases recorded	0		0/year	RRI	Annual	
% of misconduct-related conflicts resolved before formal complaint	0		100%	RRI	Annual	
Number of internal training sessions on research integrity and RRI per year	1		≥ 2 sessions/year	RRI	Annual	Integrity Committee launched in early 2025; 1 training delivered
Number of researchers attending integrity/ethics training	30		≥ 100 per year	RRI	Annual	Integrity Committee launched in early 2025; 1 training delivered
Number of citizen engagement activities carried out annually	95		≥ 50 activities/year	Communication	Annual	
Number of researchers participating in citizen engagement activities	80		100/year	Communication	Annual	
Number of HRS4R-related news items published in the internal newsletter per year			5/year	Communication	Annual	New 2026
Number of annual training sessions on C&C/HRS4R			≥ 2 sessions/year	Communication	Annual	New 2026
Number of researchers trained in C&C principles			≥ 100 per year	Communication	Annual	New 2026
% of vacancies advertised on EURAXESS	<20%		≥80%	HR	Annual	
% of newly recruited R2 researchers from abroad			25%	HR	Annual	New 2026 Calculated over newly hired postdocs
Number of researchers attracted through competitive national/international programmes	1		+2	Scientific Direction/HR	Annual	
Number of researchers completing a PhD	71		+5	Scientific Direction/HR	Annual	
Number of predoctoral researchers following the R1 training and support itinerary			>50%	HR / Training / Scientific Direction	Annual	New 2026
Number of researchers trained in leadership (future IPs)			2 / year	HR / Training / Scientific Direction	Annual	New 2026
New stability of research contracts (R1–R4)			+2	Scientific Direction/HR	Annual	New 2026
Number of leadership and mentoring activities delivered			+2	Training / Scientific Direction	Annual	New 2026
Number of incoming and outgoing mobility experiences supported			+2	Scientific Direction/HR	Annual	New 2026
Increase in the number of international researchers employed at the institute			+1	Scientific Direction/HR	Annual	New 2026
Percentage of publications available in Open Access	60		>80%	Knowledge mannage	Annual	Last KPI from 2024
Number of researchers trained in data management and FAIR principles			Increase annually	Knowledge mannage	Annual	New 2026
Number of Open Science training sessions delivered			≥ 2 sessions / year	Knowledge mannage	Annual	New 2026
Number of datasets made openly available (Open Data) in certified repositories			Increase annually	Knowledge mannage	Annual	New 2026



Template 1 – Annex: Open, Transparent and Merit-based Recruitment Check-list¹

OTM-R checklist for organisations

	Open	Trans- parent	Merit- based	Answer: ++ Yes, completely +/-Yes, substantially -/+ Yes, partially -- No	Suggested indicators (or form of measurement)
OTM-R system					
1. Have we published a version of our OTM-R policy online (in the national language and in English)?	x	x	x	++	https://www.recercasantpau.cat/institut/recursos-humans/hrs4r/
2. Do we have an internal guide setting out clear OTM-R procedures and practices for all types of positions?	x	x	x	++	https://www.recercasantpau.cat/institut/recursos-humans/hrs4r/
3. Is everyone involved in the process sufficiently trained in the area of OTM-R?	x	x	x	+-	<ul style="list-style-type: none"> - HR informs about the procedure when a recruitment has to be carried out - Specialised technical staff has been incorporated to centralise the process - New Onboarding process defined - Training for the researchers (new action)
4. Do we make (sufficient) use of e-recruitment tools?	x	x		++	Publication of the offer: job vacancies for professional associations, own web, specialized webs, Euroaxess, LinkedIn...
5. Do we have a quality control system for OTM-R in place?	x	x	x	++	<p>Defined recruitment procedures: merit-based and interviews.</p> <p>There is an evaluation sheet, a record of evaluations and a final report</p> <p>Final report and both offers and results are published on the website.</p>
6. Does our current OTM-R policy encourage external candidates to apply?	x	x	x	++	Trend in the share of applicants from outside the organization. All offers are published.
7. Is our current OTM-R policy in line with policies to attract researchers from abroad?	x	x	x	-+	Trend in the share of applicants from abroad. We'll strengthen the external communication

¹ <http://ec.europa.eu/euraxess/index.cfm/services/researchPolicies>



December 2025 version

8. Is our current OTM-R policy in line with policies to attract underrepresented groups?	x	x	x	++	Trend in the share of applicants among underrepresented groups (frequently women) Add a paragraph to the current policy to include the interest of attracting underrepresented groups such gender equality.
9. Is our current OTM-R policy in line with policies to provide attractive working conditions for researchers?	x	x	x	-+	Improve working conditions (bargaining agreement) <ul style="list-style-type: none"> - <i>Define social benefits (on going)</i> - <i>Talent attraction policies</i> - <i>Professional career</i> - <i>Teleworking & flexibility</i>
10. Do we have means to monitor whether the most suitable researchers apply?				++	Monitoring is made together with the Principal Investigator and Unit. There is a probation period.
Advertising and application phase					
11. Do we have clear guidelines or templates (e.g., EURAXESS) for advertising positions?	x	x		++	
12. Do we include in the job advertisement references/links to all the elements foreseen in the relevant section of the toolkit? [see Chapter 4.4.1 a) of the OTM-R expert report ²]	x	x		++	
13. Do we make full use of EURAXESS to ensure our research vacancies reach a wider audience?	x	x		-+	We are working to increase the publications of the job in EURAXESS
14. Do we make use of other job advertising tools?	x	x		++	
15. Do we keep the administrative burden to a minimum for the candidate? [see Chapter 4.4.1 b) ⁴⁵]	x			++	
Selection and evaluation phase					
16. Do we have clear rules governing the appointment of selection committees? [see Chapter 4.4.2 a) ⁴⁵]		x	x	++	
17. Do we have clear rules concerning the composition of selection committees?		x	x	++	Written guidelines
18. Are the committees sufficiently gender-balanced?		x	x	++	

² <http://ec.europa.eu/euraxess/index.cfm/services/researchPolicies>



December 2025 version

19. Do we have clear guidelines for selection committees which help to judge 'merit' in a way that leads to the best candidate being selected?			x	++	Written guidelines.
Appointment phase					
20. Do we inform all applicants at the end of the selection process?		x		++	In case it was required
21. Do we provide adequate feedback to interviewees?		x		++	In case it was required
22. Do we have an appropriate complaints mechanism in place?		x		++	
Overall assessment					
23. Do we have a system in place to assess whether OTM-R delivers on its objectives?				++	