

HR Strategy for Researchers — Action Plan

Implementation of the European Charter for Researchers and the OTM-R principles.

Introduction

INESC MN fully endorses the 20 principles of the European Charter for Researchers and has formally engaged in the HRS4R process leading to the HR Excellence in Research Award. As an organization dedicated to excellence in research, we prioritize the well-being and career development of our researchers. We recognize the importance of creating a stimulating and supportive environment that fosters researchers' growth, mobility and success.

By engaging with the HR Excellence in Research award process, we aim to embed the Charter's principles into our institutional policies and practices, ensuring a stimulating and supportive environment for our researchers.

The Action Plan is the central output of that initial phase and translates the conclusions of the institutional Gap Analysis against the principles of the European Charter for Researchers, together with the OTM-R policy review on Open, Transparent and Merit-based Recruitment, into a roadmap for the period 2026–2028.

Action Plan (2026–2028)

The Action Plan is structured around twelve actions covering the four pillars of the European Charter for Researchers. For each action, the description sets out what will be delivered, the Charter principles addressed indicate the gap it responds to, and the indicators and targets define how completion and impact will be measured.

Action 1 - Establishment of an Ethics Committee at INESC Lisbon level

Action: Formal establishment of an Ethics Committee at INESC Lisbon level to provide independent, specialized ethical oversight of research activities, complementing the institutional, national and European frameworks already in place.

Charter principle(s) addressed: P1.1 — Ethics and Research Integrity

Responsible unit: Management Council of INESC Lisbon

Indicators and targets:

- Formal establishment of the Ethics Committee
- Approval of the governing documents

Action 2 - Gender Balance and Diversity (GBD) Committee and revised GBD Plan

Action: Nomination of a new Gender Balance and Diversity Committee responsible for elaborating a revised GBD Plan to be approved by the INESC MN Board of Directors. The plan will include a dedicated gap analysis and action plan addressing gender balance trends over the last five years, work–life balance evaluation, researcher recruitment, and engagement of INESC MN staff and students, among other initiatives.

Charter principle(s) addressed: P1.4 — Gender Equality; P1.5 — Embracing Diversity; P2.2 — Recruitment; P3.1 — Working Conditions, Funding and Salaries

Responsible units:

- INESC MN Gender Equality and Diversity Committee
- INESC MN Board of Directors

Indicators and targets:

- Nomination of the GBD Committee (2-year mandate)
- Approved GBD Plan
- Maintain or improve gender balance within the 60:40 range
- Organize at least 2 training or dissemination activities per year (internal or in collaboration with external partners)
- 1 annual survey to the INESC MN community on GBD and work–life topics

- Further actions and targets to be defined from the GBD Plan gap analysis

Action 3 - Open Science policy, FAIR-data training and Data Steward nomination

Action: Approval of an internal regulation on Open Science policy and delivery of training to the INESC MN research community on Open Science and FAIR (findable, accessible, interoperable, reusable) data methodologies. Nomination of a Data Steward to support implementation, monitoring and compliance with data-management plans.

Charter principle(s) addressed: P1.3 — Open Science

Responsible units:

- INESC Brussels Hub
- INESC MN Executive Committee

Indicators and targets:

- Approve the INESC MN Open Science Policy
- Nomination of 1 Data Steward
- 1 training action per year

Action 4 - Revision of the performance evaluation methodology

Action: Review of the performance evaluation methodology for contracted researchers and staff. The revision maintains the qualitative-based assessment but introduces quantitative metrics, tailored to the different career paths at INESC MN and to the diversity of research activities. Based on each individual evaluation, a follow-up action plan will be implemented to tackle improvement opportunities.

Charter principle(s) addressed: P2.1 — Researchers Assessment

Responsible unit: Human Resources Department

Indicators and targets:

- Approval by INESC MN Board of Directors of an internal regulation for performance assessment
- Publication of the regulation on the INESC MN intranet and 1 internal dissemination action to the community
- Conduct the performance evaluation of all contracted researchers and staff

- All improvement actions approved within the evaluation shall be implemented before the following evaluation cycle

Action 5 - Scientific Research Career Regulation and Remuneration

Regulation

Action: Creation and approval of a Scientific Research Career Regulation addressing career accession and progression for contracted researchers, together with a Remuneration Regulation articulated with the career framework.

Charter principle(s) addressed: P2.4 — Career Progression; P3.1 — Working Conditions, Funding and Salaries; P3.2 — Stability of Employment

Responsible units:

- INESC MN Executive Commission
- INESC MN Board of Directors

Indicators and targets:

- Approval of an internal regulation for the Scientific Research Career
- Approval of an internal remuneration regulation
- Publication of both regulations on the INESC MN intranet and 1 internal dissemination action for the community

Action 6 - Internal procedure for complaints and appeals

Action: Creation of an internal procedure for complaints and appeals, securing impartial and confidential assistance in resolving work-related conflicts and grievances.

Charter principle(s) addressed: P3.1 — Working Conditions, Funding and Salaries

Responsible unit: Human Resources Department

Indicators and targets: Implementation of the anonymous complaints/appeals procedure and 1 internal dissemination action for the INESC MN community

Action 7 - Formal Safety Team and revision of safety procedures

Action: Although INESC MN already has safety procedures and provisions in place for the safe use of equipment, infrastructure and R&D activities, a formal

team responsible for Safety will be nominated. Safety procedures will be revised in collaboration with INESC's Infrastructure Management Department.

Charter principle(s) addressed: P1.6 — The Researcher (++) and operational safety governance

Responsible unit: INESC MN Executive Commission

Indicators and targets:

- Nomination of the Safety team
- Revision of safety protocols and publication on the INESC MN intranet

Action 8 - Compliance and regulatory awareness training

Action: Reinforcement of INESC MN community awareness on regulations governing R&D activities, training and working conditions. Topics will be planned on a yearly basis and may include information management, dual-use technology, GDPR/RGPD, the IP Policy, among others.

Charter principle(s) addressed: P3.3 — Contractual and Legal Obligations

Responsible units:

- Legal Department
- IP Committee
- Human Resources Department
- Communication Office

Indicators and targets: 2 training events per year

Action 9 - Mentorship Programme and Career Development support

Action: Creation of a Mentorship Programme for early-stage researchers and PhD students. Within this programme, a Career Development pathway will be implemented, based on: assessment of research competences and proficiencies following the EU ResearchComp framework; mentor-mentee sessions; definition of a working plan; and support to researchers in executing the resulting action plan.

Charter principle(s) addressed: P2.4 — Career Progression; P4.1 — Valuing Diverse Research Careers; P4.2 — Careers Development and Advice; P4.4 — Supervision and Mentoring

Responsible units:

- Human Resources Department
- Scientific Council

Indicators and targets:

- Nomination of the Mentorship Programme coordinator(s)
- Mentorship Programme guideline document and operational toolkit concluded
- Implementation and monitoring of the first mentorship cycle

Action 10 · Strengthening of the OTM-R recruitment and selection framework

Action: Consolidation of the current recruitment and selection framework into a more detailed, structured document with guidelines, governance structure and supporting templates. Definition and implementation of a monitoring methodology to assess OTM-R objectives — metrics to be defined.

Charter principle(s) addressed: P2.2 — Recruitment; P2.3 — Selection

Responsible unit: Human Resources Department

Indicators and targets:

- Approval by INESC MN Board of Directors of the Recruitment and Selection regulation (OTM-R)
- Training of personnel involved in hiring on the new OTM-R regulation
- Definition and implementation of an OTM-R monitoring methodology and production of yearly reports

Action 11 · Research-community engagement event and feedback channel

Action: Organization of an engagement event for the INESC MN research community to support participation in the institute's medium-term strategic planning. Creation of a communication channel to gather feedback from the INESC MN community, focused on continuous improvement of the research environment.

Charter principle(s) addressed: P1.6 — The Researcher

Responsible units:

- INESC MN Board of Directors
- Communication Office

Indicators and targets:

- Event delivery and report with consolidated community feedback and strategic recommendations
- Deployment of the communication channel

Action 12 · Intellectual Property and entrepreneurship awareness

Action: Reinforcement of the research community's awareness — in particular for early-stage researchers — on intellectual property strategies and entrepreneurship.

Charter principle(s) addressed: P3.4 — Dissemination and Exploitation of Results

Responsible unit: IP Committee

Indicators and targets: 1 event per year on awareness and capacity-building on IP

Implementation and Governance

The implementation of the HR Strategy will be led by the INESC MN Executive Committee, which is responsible for strategic decision-making, resource allocation and communication with the Board of Directors and the Steering Committee. Operational management — stakeholder engagement, activity planning, monitoring and reporting — is entrusted to the HR Award Administrator, working closely with the responsible units identified in the Action Plan and with the participation of the Working Group.

A three-phase implementation approach

The first phase focuses on the formalization of institutional regulations and policies and the establishment or reinforcement of governance bodies. This phase puts in place the institutional backbone needed to address the gaps identified in the diagnosis and is accompanied by dissemination activities aimed at engaging the research community.

The second phase centers on operational deployment and capacity building. The Mentorship Programme is rolled out, the renewed performance-assessment cycle is

conducted, the complaints and appeals mechanism become operational, and training activities are delivered across Open Science, intellectual property, safety and recruitment practices. The goal is to translate the newly approved policies into concrete practice and to ensure that the research community is equipped and motivated to engage with them.

The third phase concentrates on monitoring, evaluation and continuous improvement. It includes regular performance-evaluation cycles, annual surveys on gender balance and work–life conditions, the yearly OTM-R monitoring reports and structured feedback channels. The aim is to ensure that implementation remains evidence-based and responsive to the evolving needs of the institute and its researchers.

The HR Strategy as an overarching framework

The HR Strategy is explicitly recognized as the overarching framework for human-resources management at INESC MN and is integrated into the institute’s broader research strategy and governance processes. The internal regulations developed and revised through this Action Plan — covering recruitment (OTM-R), performance assessment, Scientific Research Career, remuneration, Open Science and safety — are formally approved by the Board of Directors and enforced in the day-to-day governance of the institute.