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SMART
Researchers

Deliverable 2.1

SMART Researchers Strategic Action Plan (SAP) Framework for ESR Career Development

WP 2 - Transforming career support systems
for ESRs development



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COORDINATOR

University of Novi Sad Faculty of Technical Sciences (UNSFTS), Serbia

PARTNERS

Minds Europe – Institute for Research Excellence and Technological Advancement
(MEI), Serbia

Future Systems Hub Entrepreneurship and Innovation Association (FSH), Serbia
HR Road (HRoad), Serbia

University of Thessaly (UTH), Greece

Institute of Entrepreneurship Development (IED), Greece

Scientific Events - PM² Certification Center (PM2CC), Greece

University of Split, Faculty of Economics, Business and Tourism (UNISTFEBT),
Croatia

Institute for Development and International Relations (IRMO), Croatia

Sparky Solution (SPARKY), Croatia

European Academy (EA), Latvia

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Document Author(s) and Reviewer(s):

Author Name	Organization Acronym	E-mail
Danijela Ćirić Lalić	UNSFTS	danijela.ciric@uns.ac.rs
Mladen Radišić	FSH	mladen@futuresystemshub.com
Maja Radišić	FSH	maja@futuresystemshub.com

Reviewer Name	Organization Acronym	E-mail
---------------	----------------------	--------



Dušan Pevac	FSH	dusan@futuresystemshub.com
Tamara Trninić Gondi	FSH	tamara@futuresystemshub.com
Nadiia Khakimova	FSH	nadiia@futuresystemshub.com
Nataša Grbović Vagić	FSH	ngrbovic@futuresystemshub.com

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Table with Acronyms

Acronym	Full Form
CSC	Career Support Center
ESR	Early-Stage Researcher
EFRC	European Framework for Research Careers
ERA	European Research Area
HE	Horizon Europe
HR	Human Resources
HRS4R	Human Resources Strategy for Researchers
SAP	Strategic Action Plan
MEPF	Monitoring, Evaluation and Policy Feedback
SO	Specific Objective
WP	Work Package
OTM-R	Open, Transparent and Merit-based recruitment
KPI	Key Performance Indicator

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EXECUTIVE SUMMARY

This Deliverable presents the Strategic Action Plan (SAP) Framework for ESR career development, within the SMART Researchers project. The SAP will outline strategies to enhance ESR career support and align institutional HR practices with a Council Recommendation on a European Framework for Research Careers and the European Charter for Researchers, to implement the standards for attractive research careers.

Function of this framework document

This Framework serves as a structured template guiding each partner institution in:

- Translating project objectives into institutional actions,
- Ensuring internal coordination and ownership,
- Defining measurable objectives, KPIs, and milestones,
- Monitoring risks and implementation progress,
- Securing long-term institutional integration beyond project duration.

1 INTRODUCTION

1.1 PURPOSE AND SCOPE OF THE STRATEGIC ACTION PLAN

The Strategic Action Plan (SAP) provides a structured, institution-wide framework for planning, implementing, monitoring, and institutionalising career development measures for Early-Stage Researchers (ESRs) over a five-year period (2026–2031).

For the purpose of this Framework, Early-Stage Researchers are defined in accordance with the Council Recommendation on a European Framework for Research Careers as:

- **First Stage Researchers** – researchers undertaking research under supervision up to the point of a PhD or equivalent level of competence and experience;
- **Recognised Researchers** – researchers holding a PhD or equivalent level of competence and experience who are not yet fully independent in leading research, attracting funding, or managing research groups.

The SAP aims to strengthen institutional HR systems, enhance career pathways for ESRs, and establish sustainable, structured support mechanisms aligned with European standards for research careers.

Evidence base and development logic

The SAP is developed as an integral component of the Horizon Europe project:

SMART Researchers: Strategic Micro-Credentialing and Skills Recognition for a Dynamic ESRs Talent Ecosystem

The development of the SAP is grounded in:

- HR Audit and Capacity Assessment results,
- Researcher Survey findings,
- Participatory workshops and stakeholder consultations,
- Alignment with HRS4R principles,
- The European Framework for Research Careers,
- The European Charter for Researchers.

Together, these inputs ensure that the SAP is evidence-based, participatory, and aligned with both institutional realities and European policy frameworks.

Strategic focus areas

The SAP addresses identified HR and structural gaps and focuses on the following core strategic elements:

1. **Clear definition of researcher roles and career paths**
Establishing transparent career trajectories within and beyond academia, enabling ESRs to make informed career decisions.
2. **Recruitment reforms**
Strengthening OTM-R principles, promoting diversity, sectoral mobility, and interdisciplinary collaboration.
3. **Structured career progression frameworks**
Embedding entrepreneurship, innovation, and transversal competencies required for the green and digital transitions.
4. **Intersectoral and interdisciplinary career support**
Formalising pathways toward both academic and non-academic careers through structured institutional support mechanisms.

Governance, implementation and transparency

The SAP will be implemented by institutional leadership teams and relevant governance bodies, with continuous monitoring and evaluation mechanisms ensuring alignment with:

- The Council Recommendation on a European Framework for Research Careers,
- The European Charter for Researchers,
- ERA policy priorities.

Early-Stage Researchers will remain actively engaged throughout the process—from co-design to implementation—ensuring that institutional reforms reflect their real needs and experiences.

Following adoption, the SAP will be made publicly accessible to ensure transparency and contribute to broader policy learning and institutional uptake across the European Research Area (ERA).

Future Systems Hub is a non-governmental organization (NGO) with strong links to academia, operating through a lean organisational model in which researcher support functions are embedded across existing management and operational units rather than traditional university-style offices. With a strong base of early-stage researchers and research-active staff, the organisation benefits from a structured, long-term framework for supporting research careers. The SAP will help formalise career progression and skills development within Future Systems Hub, which is important for retaining emerging talent and enabling stronger contributions to innovation. At the same time, aligning with European standards strengthens Future Systems Hub's institutional capacity, enhances its credibility in EU-funded projects, and ensures that its research-driven activities are supported by sustainable, high-quality human resource practices.

1.2 PROJECT CONTEXT AND STRATEGIC ALIGNMENT

Early-Stage Researchers in less research- and innovation-advanced countries in Europe often face structural challenges, including precarious employment conditions, limited mobility opportunities, insufficient career support structures, and weak recognition of transversal competencies. These systemic barriers reduce institutional competitiveness and limit Europe's capacity to fully leverage its research and innovation potential—particularly in the context of the green and digital transitions.

The SMART Researchers project responds to these challenges by:

- Establishing **Career Support Centres (CSCs)** as institutional hubs for continuous and structured career guidance;
- Developing and implementing **Strategic Action Plans** aligned with ERA principles and the European Charter for Researchers;
- Designing a **micro-credentialing and certification framework** based on the European Competence Framework for Researchers (ResearchComp);
- Strengthening institutional HR practices and talent development systems;
- Providing structured policy feedback to support EU-level harmonisation and standardisation of research career systems.

Project objectives and outcomes are fully aligned with ERA priorities through:

- Development of new instruments supporting research careers,
- Creation of sustainable institutional ecosystems for research talent,

- Implementation of European standards for researcher careers across sectors,
- Strengthening ESR competences and long-term employability.

1.3 INSTITUTIONAL CONTEXT

Future Systems Hub is an Impact Venture Group that bridges science and society by transforming scientific findings into real-world applications. As an organisation focused on turning innovation into impact, it works across the full innovation cycle - sharing and communicating new ideas, developing and validating business models, supporting cascade funding mechanisms, managing intellectual property and exploitation processes, and enabling piloting, training, and scaling of solutions. Its activities are strongly oriented toward applied research support, innovation transfer, and ecosystem development, with close collaboration with universities, research institutes, and SMEs across Europe.

Within this context, Future Systems Hub brings together a multidisciplinary team working at the intersection of research, innovation, and entrepreneurship, supporting both academic and applied outcomes. Given the diversity of roles and competencies across the organisation, the Strategic Action Plan (SAP) is essential for establishing clear career pathways, structured professional development, and transparent progression opportunities for employees and researchers. It will strengthen internal HR practices by providing a coherent framework for mentoring, skills development, and recognition of competencies, thereby ensuring that staff and early-stage researchers can grow within the organisation while contributing more effectively to innovation and impact creation.

1.3.1 INSTITUTIONAL PROFILE

Institution name: Future Systems Hub

Country: Serbia

Legal status (public university, research institute, foundation, etc.): Non-governmental organization (association)

Number of academic/research or other staff: 10

Number of Early-Stage Researchers (R1 + R2): 8

Main research domains / faculties: n/a

Brief description (max. 200–300 words):

Future Systems Hub is operating at the intersection of science, innovation, and society, with a strong focus on transforming research outcomes into real-world applications. Its research profile is strongly applied and innovation-oriented, supporting the full innovation cycle, from idea development and dissemination, through business model design, cascade funding, intellectual property and exploitation management, to piloting, training, and scaling of solutions.

Strategically, Future Systems Hub prioritises accelerating sustainable innovation and strengthening the link between academia, industry, and policy. It actively contributes to European research and innovation agendas, particularly through participation in EU-funded projects and cross-border collaborations within Horizon Europe and related programmes. The organisation's international positioning is based on its role as a

facilitator within innovation ecosystems, working closely with universities, research institutes, SMEs, and public stakeholders across Europe.

Future Systems Hub is headquartered in Novi Sad, Serbia, at the Faculty of Agriculture of the University of Novi Sad, with a second office in Osijek, Croatia at the business acceleration premises of the Josip Juraj Strossmayer University. This embedded academic environment ensures strong access to research excellence and talent pipelines. In terms of HR and researcher development, the organisation relies on a multidisciplinary team and close integration with academic partners, combining research, innovation management, and ecosystem support expertise. Current structures are oriented toward project-based learning, mentoring, and capacity building, with the Strategic Action Plan (SAP) aimed at further formalising career pathways, strengthening internal HR practices, and ensuring structured development opportunities for early-stage researchers and staff.

1.3.2 ROLE IN THE SMART RESEARCHERS PROJECT

Within the SMART Researchers project, FSH leads WP6- Dissemination, Communication and Exploitation, leveraging its expertise in research and innovation (R&I) commercialisation, dissemination, and stakeholder engagement. Its established commitment to open science and adherence to FAIR principles will ensure that project results are widely accessible, effectively shared, and maximised for impact.

Additionally, Future Systems Hub supports the Serbian national cluster led by the University of Novi Sad, Faculty of Technical Sciences (UNSFTS). As a non-academic partner that participated in the SMART Researchers Questionnaire and HR audits, FSH will implement a Strategic Action Plan for ESRs, ensuring alignment of institutional HR practices with the Council Recommendation on a European Framework for Research Careers and the European Charter for Researchers. Through this, FSH will contribute to the establishment of Career Support Centres that provide continuous career guidance and tailored capacity-building for ESRs, supporting their transition from research training to the effective and impactful application of their skills and knowledge in real-world contexts.

1.3.3 ALIGNMENT OF THE SAP WITH INSTITUTIONAL STRATEGY AND GOVERNANCE

The SAP will be embedded within Future Systems Hub's institutional governance framework by being formally integrated into existing management and decision-making structures, rather than operating as a separate initiative. Its implementation will be assigned through defined internal responsibilities across management, project coordination, and HR-related functions, while progress will be regularly monitored through established governance meetings, reporting lines, and internal review cycles. This ensures that SAP activities are systematically included in the organisation's standard planning, implementation, and evaluation processes.

Furthermore, the SAP will be integrated as a component of the upcoming Gender Equality Plan (GEP); it may additionally be formalised as a standalone strategy. By integrating the SAP into these existing structures, Future Systems Hub ensures that

career development measures for researchers are operationalised in a consistent and accountable way, supporting long-term sustainability, continuous improvement of HR practices, and alignment with European frameworks for research careers.

A. Strategic alignment

The SAP will align with the forthcoming GEP, internal project management frameworks, operational and internal procedures, HR-related practices, and internal governance structures within Future Systems Hub. The SAP will support these documents by formalising recruitment, training, career development, mentoring, and monitoring processes for researchers and staff. It will also strengthen internal planning, KPI tracking, reporting, and decision-making through clearly assigned responsibilities and regular review mechanisms. By integrating SAP activities into existing governance and operational structures, the organisation will support more transparent, structured, and sustainable HR and researcher development practices aligned with European research career standards and ERA priorities.

B. Adoption and approval mechanism

Adoption Body:

The SAP will be formally adopted by the Expert Council, the executive body responsible for strategic and operational decision-making within the institution. The document will be developed by the designated working groups, through the focus group, workshop, and consultation meeting. The administrative unit will also provide feedback during an internal review phase. This will be followed by a structured consultation process with stakeholders who influence researcher careers. (e.g. mentors, senior researchers, etc.)

C. Institutional embedding mechanism

Overall responsibility for the SAP will be assigned at management level, ensuring direct leadership engagement in its strategic direction and implementation. This approach will embed the SAP into Future Systems Hub's operational practices and long-term development planning.

The CEO will provide strategic oversight, ensuring alignment between the SAP and the organisation's broader mission, priorities, and Horizon Europe commitments. The CEO will also approve major annual updates to the SAP.

A designated SAP Coordinator will oversee day-to-day coordination, monitor implementation progress, consolidate reporting, and ensure consistency across all pillars. The Coordinator will also supervise KPI monitoring and validate any adjustments to indicators or targets.

Each SAP pillar will be led by a designated Pillar Lead selected from the management structure, including the Head of Operations, Head of Finance, Head of Dissemination

and Communication, Head of Ecosystem Building, and Head of Exploitation, depending on the thematic relevance of each pillar. Pillar Leads will be accountable for implementation of activities, resource planning, milestone delivery, and progress reporting to the SAP Coordinator.

Where relevant, specialised functions such as career system development, researcher support, training, or mobility activities may be assigned to dedicated internal leads or project staff.

The Administration and Finance department will support implementation through recruitment procedures, contract administration, budgeting, documentation, and regulatory compliance, ensuring that operational processes are aligned with SAP priorities.

To support evidence-based implementation, a Monitoring and Data Officer (or designated staff member) will track KPIs, collect implementation data, and prepare progress analyses for management review.

Progress under the SAP will be integrated into annual work plans and budgeting cycles. Monitoring will include quarterly internal reviews led by the SAP Coordinator and Pillar Leads, focusing on KPI progress, risks, implementation gaps, and corrective actions.

An annual strategic review by the Management Team will assess progress, approve adjustments, and confirm priorities for the following year. A mid-term review in Year 3 will evaluate progress against interim targets and identify any required corrective measures.

A final review in Year 5 will assess overall implementation results, achievement of targets, organisational impact, and recommendations for continuation or scaling of the SAP.

D. Public accessibility and transparency

The adopted SAP will be publicly available on the institutional website (<https://futuresystemshub.com/>) under a dedicated section, e.g. Documents Tab. Progress reports and monitoring summaries will also be published annually to highlight key developments and achievements. This ensures transparency and accountability, allowing all relevant parties to stay informed on the SAP's implementation and impact.

1.3.4 TARGET BENEFICIARIES

The primary beneficiaries of SAP implementation are R1 and R2 researchers, who will directly benefit from strengthened career development structures, training opportunities, mobility support, and enhanced professional development mechanisms.

Secondary beneficiaries include the CEO, heads of organisational units and staff, who will benefit from improved coordination, clearer processes, and a more structured framework for supporting researcher development and project implementation.

External stakeholders, including industry partners and public sector actors, will benefit from improved collaboration mechanisms, enhanced researcher competencies, and increased capacity for knowledge transfer, innovation, and impact generation.

The estimated number of direct beneficiaries includes approximately [6-10] R1 and R2 researchers and [20+] staff members across Future Systems Hub units, with the total scope to be specified upon final institutional mapping.

1.3.5 EXISTING STRUCTURES RELEVANT TO SAP IMPLEMENTATION

As an NGO, Future Systems Hub operates through a lean organisational model rather than traditional university-style administrative offices. Functions relevant to researcher development are currently embedded across existing management and operational units.

Current structures relevant to SAP implementation include:

- **CEO** - provides strategic direction and ensures alignment of the SAP with Future Systems Hub's overall mission, Horizon Europe commitments, and organisational priorities.
- **Administration and Finance Unit** - responsible for recruitment procedures, contracts, budgeting, compliance, and administrative support.
- **Operations Unit** - responsible for internal coordination, workflow management, and implementation support.
- **Dissemination and Communication Unit** - supports outreach, visibility, stakeholder engagement, and development of communication skills for researchers.
- **Ecosystem Building Unit** - supports partnerships, networking, mentoring opportunities, and engagement with innovation ecosystems.
- **Exploitation Unit** - supports knowledge valorisation, entrepreneurship, commercialisation pathways, and collaboration with industry.

As Future Systems Hub is not a higher education institution, structures such as International Office, or Technology Transfer Office do not currently exist as standalone offices. Their relevant functions are distributed across existing departments.

Early-Stage Researchers' career development is primarily supported through hands-on engagement across Ecosystem Building, Dissemination and Communication, and Exploitation activities. This enables researchers to develop transferable skills in stakeholder engagement, impact creation, research valorisation, and innovation-driven collaboration within European research and innovation ecosystems.

2. METHODOLOGY, DATA AND ORGANIZATIONAL READINESS

2.1 METHODOLOGICAL FRAMEWORK FOR SAP DEVELOPMENT

The Strategic Action Plan (SAP) is developed through an evidence-based, participatory, and governance-aligned methodological framework designed to ensure institutional ownership, policy alignment, and operational feasibility.

The methodology integrates four complementary evidence streams:

- **HR Audit and Capacity Assessment** – establishing an institutional baseline of HR maturity
- **Researcher Survey (R1/R2)** – capturing perception-based evidence from Early-Stage Researchers
- **Participatory Consultation Processes** – co-design and validation with internal stakeholders
- **Policy Alignment Review** – ensuring consistency with the European Charter for Researchers, HRS4R principles, and the European Framework for Research Careers

These streams form a structured diagnostic-to-action pathway:

**Baseline Diagnosis → Gap Identification → Priority Setting →
Institutional Validation → Action Design → KPI Structuring**

This approach ensures that the SAP is:

- evidence-informed
- institution-specific
- aligned with EU policy frameworks
- developed through stakeholder participation
- feasible within existing governance structures

The development process follows the principles of:

- transparency
- co-design
- accountability
- evidence triangulation
- institutional embedding

2.1 HR AUDIT AND CAPACITY ASSESSMENT

With an overall average of 1.94, the institution lies on the boundary between the Initial/Fragmented and Basic maturity levels, reflecting a system that is evolving but not yet structurally consolidated. The comparatively strong result in working

conditions indicates solid operational functioning and alignment with legal and administrative requirements, marking a clear area of strength. In contrast, the scores for ethics and open science, recruitment and progression, and particularly research career development indicate opportunities to further strengthen formalisation, coherence, and long-term HR planning. The current variation in performance highlights that valuable practices already exist and provide a strong foundation to build on. Moving forward, there is a clear opportunity to further strengthen consistency by embedding these practices within more unified institutional frameworks. With improved coordination and alignment of HR policies, institutions can enhance the effectiveness of their efforts and ensure a more cohesive approach.

HR audit baseline

Pillar	Average Score (0–4)	Interpretation (150–250 words per pillar)
Pillar 1 – Ethics, integrity, gender & open science	2.08	Positive practices in ethics, integrity, diversity, and open science are visible in documentation and daily work, but key elements (e.g. unified policies, GEP, and a consolidated open science framework) are not yet fully formalized or consistently implemented across the organization.
Pillar 2 – Assessment, recruitment & progression (OTM-R)	1.91	OTM-R and recruitment practices are at an early stage: transparent adverts, gender-balanced panels, and candidate feedback exist, but they remain largely ad hoc and are not embedded in a clear institutional OTM-R policy or procedure.
Pillar 3 – Working conditions and practices	3.00	Working conditions and compliance with national legislation are generally well established, with transparent contracts, payroll, and flexible work arrangements, though some HR procedures and benefits are still defined on a case-by-case basis rather than through integrated policies.
Pillar 4 – Research careers and talent development	0.75	Research career development is currently evolving: training opportunities and mentorship are available mainly through projects and management initiatives, with further scope to strengthen structured support, progress tracking, and proactive, researcher-driven career planning.

Interpretation guidance

Pillar 1 (Ethics and Open Science, 2.08) and Pillar 3 (Working Conditions, 3.00) can be classified as moderately structured, indicating that relevant policies and practices are in place and partially embedded, with Pillar 3 representing a relative strength due to stronger alignment with regulatory and operational standards. In contrast, Pillar 2 (Recruitment and Progression, 1.91) falls within a developing system, suggesting that while some procedures exist, they are inconsistently applied and lack full alignment with OTM-R principles. Most critically, Pillar 4 (Research Careers, 0.75) remains at an emerging maturity level, reflecting a absence of coherent career development systems, fragmentation of responsibilities across units, and limited formalised support structures such as mentoring frameworks, progression pathways, or institutional career guidance mechanisms. This configuration shows that many institutional efforts are already underway, providing a solid base to build more integrated, organization-wide strategies. By bringing these initiatives into closer alignment and strengthening central coordination, institution can create a more cohesive and effective approach to HR development.

The HR Audit serves as the baseline benchmark for mid-term and final evaluation.

2.2 RESEARCHER SURVEY FINDINGS

(Perception-based institutional evidence) FSH is a non-academic institution and has applied the SMART Researchers Questionnaire as a structured diagnostic tool to systematically assess researchers' experiences and perceptions among its employees (ESRs) and researchers from several faculties at the University of Novi Sad. The insights gathered serve to inform the development of policies and practices that support transparent, sustainable, and impactful research careers. Therefore, the findings presented in the table below do not reflect FSH, but rather a range of institutions within the University of Novi Sad.



Researcher survey results

Pillar	Mean score (1–5)	Key strengths identified	Key gaps identified	Interpretation (100–200 words)
Pillar 1 – Ethics, integrity, gender & open science	3.88	Strong individual-level awareness, autonomy, and engagement with ethics, equality, and Open Science principles.	Weaker perceptions of institutional structures, formalized training, and support mechanisms	The mean score for Pillar 1 indicates partial implementation / area for improvement, reflecting respondents' overall perceptions of ethics, integrity, gender equality, Open Science, and sustainability-related institutional practices. Higher mean scores were recorded for statements related individual awareness to ethical standards and research integrity codes, academic freedom, openness, and measures promoting equality and flexible career paths. These findings suggest that respondents generally perceive autonomy, personal responsibility, and engagement with core principles as well established within the research environment. In contrast, lower mean scores were observed for statements addressing infrastructure, training, and incentives for Open Science, guidance on research ethics and integrity, promotion of sustainable research practices, recognition and valuation of researchers' contributions, diversity and inclusion in recruitment and evaluation,

				integration of sustainability principles, support for flexible and non-linear career paths, and mechanisms to prevent and respond to discrimination or harassment. These quantitative patterns are complemented by qualitative insights that point to clear opportunities for improvement. Enhancing the visibility of rules and procedures, ensuring more consistent implementation of policies across organizational units, and strengthening structured support for early-career researchers can further reinforce existing efforts and contribute to a more cohesive and supportive environment.
Pillar 2 – Assessment, recruitment & progression (OTM-R)	3.52	Formal procedures and evaluation criteria are generally in place	While procedures may formally exist, their application and consistency across recruitment, assessment, and promotion processes remain uneven, highlighting opportunities for further improvement	The results indicate partial implementation, reflecting respondents' overall perceptions of recruitment, assessment, and career progression practices. Findings suggest relatively more positive perceptions regarding the existence of transparent career progression processes, recognition of teamwork and diverse research outputs, and the presence of formal criteria for evaluation and promotion. Additionally, the results indicate that respondents acknowledge the presence of structured

			in fairness, inclusivity, and transparency.	frameworks supporting career development and assessment. However, these frameworks are perceived as only partially operationalized in practice.
Pillar 3 – Working conditions and practices	3.46	Favourable perceptions of working conditions, generally supportive and flexible working environments and openness-related practices	Weaker perceptions regarding structured training on regulatory and compliance-related aspects.	The mean score indicates partial implementation, reflecting generally positive perceptions of working conditions, flexibility, and openness, alongside identifiable gaps in structured institutional support. There is a clear contrast between strong perceptions related to legal clarity, work-life balance, and openness of research, and weaker perceptions regarding formal training on intellectual property, data protection, and compliance. While respondents feel informed about their contractual obligations and encouraged to engage with society and Open Science, they report modest access to systematic training in regulatory and procedural domains. Participants describe supportive working environments and high individual motivation, yet point to variability in institutional support and uncertainty regarding long-term career stability. These findings suggest that the overall pillar-level score is shaped by a

				combination of favourable everyday working conditions and individual initiative, alongside insufficient institutionalisation of training, career continuity frameworks, and regulatory guidance, particularly relevant for early-career and project-based researchers.
Pillar 4 – Research careers and talent development	3.42	Strong perceptions of interpersonal supervisory relationships and individual-level support for development, particularly in terms of trust, feedback, and mentoring at the level of direct supervision.	Weaker perceptions of structured institutional support for mentoring systems and systematic career development mechanisms.	The mean score indicates partial implementation, reflecting a mixed picture of research career and talent-development practices. Strong individual-level supervision and mentoring relationships coexist with weaker institutionalisation of career development structures. Statement-level results reveal a pronounced contrast between high scores for trust, feedback, and supervisor support, and lower scores for formal mentoring systems and training for supervisors. While respondents benefit from supportive interpersonal relationships, they perceive gaps in structured mechanisms that would ensure consistent access to mentoring, guidance, and development opportunities across the institution. Participants consistently describe reliance on individual supervisors and

				personal initiative, alongside the absence of clearly defined, institution-wide frameworks for career planning, mentoring, and preparation for diverse career paths. These results indicate that the overall pillar-level score benefits from strong individual-level support, providing a solid foundation to build on. There is a clear opportunity to further strengthen this by advancing the institutionalisation of mentoring systems, enhancing supervisor training, and developing more structured career pathways.
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Interpretation guidance

When it comes to Pillar 1 – Ethics, integrity, gender and open science, there is clear alignment between ESR perceptions and the HR audit in recognizing that core values are present, particularly reflected in high levels of individual awareness and perceived academic freedom, which supports the classification of this pillar as moderately structured. At the same time, ESR feedback highlights important opportunities to further strengthen how these principles are put into practice. Expanding access to training, enhancing infrastructure, introducing stronger incentives for Open Science, and providing clearer procedural guidance can help build on existing efforts. While the audit confirms the presence of relevant policies and positive practices, these insights suggest there is room to further embed them consistently across everyday practice. Strengthening this alignment can enhance both the visibility and the impact of institutional efforts.

For Pillar 2 – Assessment, recruitment & progression, ESR findings confirm the audit assessment by acknowledging the existence of structured frameworks, formal criteria for evaluation and promotion, and elements of transparent career progression, which aligns with the HR audit observation that relevant procedures are in place but not yet fully consolidated or consistently applied in line with OTM-R principles. At the same time, ESR perceptions add a valuable layer of nuance by showing that these mechanisms, while in place, are often experienced as only partially operational in practice. This highlights an opportunity to further align formal frameworks with day-to-day implementation. While institutional

documentation reflects the presence of established procedures, ESR feedback points to the importance of ensuring their consistent and visible application across contexts, ultimately strengthening overall effectiveness and impact.

For Pillar 3 – Working Conditions, there is a strong overall convergence between ESR perceptions and the HR audit, particularly in confirming that working conditions are generally well established and that the system can be classified as moderately structured. Both sources highlight positive aspects such as clear contractual arrangements, transparency in employment conditions, flexibility, and compliance with national legislation, which are reflected in ESRs' favourable perceptions of work–life balance, openness, and overall supportive working environments. At the same time, both the ESR findings and the audit point to a shared understanding that some HR processes can be further strengthened through more consistent formalisation and integration into institutional policies. This alignment highlights a clear opportunity to build on existing practices and enhance overall system coherence.

For Pillar 4 – Research careers and talent development, the HR audit and ESR findings are largely aligned in showing a clear lack of structured career development at institutional level. The HR audit indicates that career development systems are currently decentralised across units, with opportunities to further strengthen coordination and formal mechanisms such as mentoring frameworks, clear progression pathways, and institutional career guidance. ESR responses strongly confirm this picture, as researchers also describe a system that depends mainly on project-based support and individual supervisors rather than consistent, institution-wide career planning. At the same time, ESR feedback brings an important and constructive nuance. While formal structures can be further strengthened, researchers report positive day-to-day experiences, particularly in terms of trust, supervisor support, and regular feedback. This reflects a strong interpersonal foundation that already supports researchers in practice. Building on this, there is a clear opportunity to formalise and scale these effective practices, ensuring they are consistently available across the institution. In this way, the existing culture of support can be translated into a more structured and sustainable framework, enhancing both consistency and long-term impact.

2.3 ORGANIZATIONAL READINESS ASSESSMENT

Benchmark definition

Organizational readiness is assessed across three dimensions:

1. Structural readiness (governance, policies, procedures)
2. Operational readiness (resources, staffing, tools)
3. Cultural readiness (leadership commitment, openness to reform, ESR engagement)

Organizational readiness

Dimension	Evidence source (Audit/Survey)	Current status (Low/Moderate/High)	Main constraints	Required institutional changes
Structural readiness	HR Audit	Low	Limited dedicated HR capacity with explicitly assigned responsibility for HR development activities.	Hire a dedicated HR expert to lead and coordinate HR development activities. Strengthen HR knowledge and capacity of department heads through targeted training and upskilling.
Operational readiness	HR Audit	Moderate	Standardized tools and systems for HR processes are not yet fully established.	Full implementation of HR tools, ensuring they are used regularly for structured personnel monitoring and HR management processes.

Cultural readiness	HR Audit	Moderate/High	Further opportunity to strengthen institutional focus and prioritisation of HR development activities, supporting more coordinated and consistent implementation.	Establish a dedicated task force focused on setting up and strengthening the ecosystem, ensuring coordinated development of structures, processes, and tools across the institution.
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FSH is not an HEI, but an NGO/Research Performing Organization that employs a subset of ESRs among its staff. Considering this, FSH will apply SAP with the aim of supporting its staff and researchers' professional growth and providing them with opportunities to develop competencies aligned with ResearchComp like managing projects, making an impact through dissemination, communication and exploitation, etc. Activities will rely on existing resources and capacity-building efforts. Existing structures are generally sufficient to support the implementation of SAP. Resources are primarily available but may require internal reallocation. Potential structural barriers include differences between departments, varying administrative capacities, and coordination challenges across stakeholders, which could affect implementation speed. Overall, the institutional risk level is assessed as moderate.

2.4 PARTICIPATORY PROCESS AND CO-DESIGN VALIDATION

The SAP must be validated through structured consultation. The table below presents the participatory process.

Participatory process documentation

Activity Type	Participants	Date	Key topics discussed	Key decisions / Priorities Confirmed
Focus group	ESR representatives, department leads	20.04.2026.	Ethics and GDPR knowledge gaps; Need for structured training; need for institutional career guidance; current autonomy levels.	Priority to introduce mandatory ethics/GDPR training modules; strengthen institutional support for research career development
Workshop	Management team, department leads, Administrative units	20.04.2026.	OTM-R compliance gaps; lack of formal protocols; need for structured IDPs; monitoring mechanisms	Decision to develop formal rulebook for recruitment and progression; implement IDPs for all researchers; establish monitoring protocols

D2.1. SMART Researchers Strategic Action Plan (SAP) Framework for ESR Career Development



Consultation meeting	Management team, Administrative units	20.04.2026.	Implementation feasibility; timeline alignment; resource allocation; onboarding integration	Agreement on phased implementation (mid-term and long-term targets); integration of training into onboarding; management team confirmed as responsible owner
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The participatory process was conducted through three consecutive events held on the same day: a focus group, a workshop, and a final consultation meeting.

The process began with a focus group involving ESR representatives and department leads. During this session, key priorities were discussed, including the introduction of mandatory ethics and GDPR training modules and the need to strengthen institutional support for researchers' career development.

Building on these initial discussions, department leads participated in a workshop with the management team and administrative units. The workshop focused on four areas: First, strengthening ethics, GDPR, and open science knowledge across the institution; Second, the need to formalise recruitment, assessment, and progression processes in line with OTM-R principles, given that existing practices are largely ad hoc; Third, improving working conditions. The introduction of Individual Development Plans, along with structured career development pathways, was prioritised to support long-term talent development. There was also a strong consensus on the importance of formalising processes and establishing institution-wide standards. Participants agreed on the need for mandatory training modules, clearer internal guidelines, and robust monitoring systems. The development of a formal rulebook for recruitment and the universal implementation of IDPs were also widely supported.

The process concluded with a final consultation meeting between the management team and administrative units, focusing on implementation timelines and resource allocation. While the management team supported ambitious targets, administrative units emphasised the need for a phased approach to ensure feasibility.

3. OBJECTIVES AND MEASURES PER PILLAR

3.1 STRATEGIC PILLAR ARCHITECTURE

The Strategic Action Plan (SAP) operationalises institutional reform across four structurally defined pillars aligned with the European Framework for Research Careers and the European Charter for Researchers:

1. **Ethics, Integrity, Gender and Open Science**
2. **Researchers' Assessment, Recruitment and Progression (OTM-R)**
3. **Working Conditions and Practices**
4. **Research Careers and Talent Development**

Each pillar translates diagnostic findings from Section 2 into measurable institutional commitments for the period 2026–2031.

3.2 OBJECTIVES AND MEASURES PER PILLAR (SMART FRAMEWORK)

The objectives defined in this section are directly derived from the institutional HR audit and researcher survey findings, which identified gaps in the formalisation of HR practices, limited structured training in ethics and GDPR, partial implementation of OTM-R principles, insufficient support for researcher autonomy and well-being, and the absence of systematic career development planning. In response, the SAP defines four targeted SMART objectives across the pillars, focusing on: (i) increasing institutional coverage of GDPR and ethics training, (ii) formalising recruitment and assessment processes through OTM-R-aligned protocols, (iii) strengthening working

conditions through enhanced autonomy and well-being support measures, and (iv) introducing structured Individual Development Plans (IDPs) for researchers.

Each objective is supported by measurable KPIs with clearly defined baselines (reflecting current ad-hoc or low-coverage practices), mid-term milestones, and 2031 targets. Responsibility is assigned at the management level to ensure institutional ownership, while implementation measures focus on system-level changes, including the development of rulebooks, training frameworks, and monitoring protocols. Together, these objectives aim to transition existing informal or fragmented practices into structured, transparent, and sustainable institutional systems aligned with ERA priorities.

3.2.1 OBJECTIVES AND MEASURES



Pillar	SMART objective	KPI	Baseline (2025)	Target (2031)	Interim target (Mid-term)	Responsible owner	Due date	Key initiatives/actions
Pillar 1 – Ethics, integrity, gender & open science	Better GDPR & ethics knowledge across the institution	% of staff and researchers completing ethics/GDPR training annually	<10% participation/coverage	≥30%	≥20%	Management team	2030	Development of mandatory training modules, internal guidelines, onboarding integration.
Pillar 2 – Assessment, recruitment & progression (OTM-R)	Part of OTM-R compliance defined and operationalised	Protocols created	Ad-hoc practices	100% formalised protocols	50% implementation	Management team	2028	Development and adoption of a formal rulebook
Pillar 3 – Working conditions and practices	Full autonomy in work and support programmes implemented	% staff fully autonomous in work	~30%	≥80%	≥50%	Management team	2030	More training and implementation of well-being processes
Pillar 4 – Research careers and talent development	IDPs (Individual Development Plans) for researchers	Plans in place	Ad-hoc practices	100% of researchers with IDPs	50% coverage	Management team	2028	Establishment of research monitoring protocols

3.3 PHASED IMPLEMENTATION TIMELINE AND RESOURCING

This section operationalises the Strategic Action Plan and demonstrates implementation realism. Implementation is structured across four strategic phases:

1. **Initiation (Year 1)**
Governance setup, baseline consolidation, system design, internal approvals.
2. **Rollout (Years 1–3)**
Implementation of priority measures and launch of core initiatives.
3. **Consolidation (Years 3–4)**
Integration into institutional processes, KPI monitoring, adjustments.
4. **Institutionalisation (Years 4–5)**
Formal embedding into regulations, HR systems, and budgeting structures.

This section outlines the phased implementation of the Strategic Action Plan, translating the defined SMART objectives into a realistic and structured timeline. The implementation approach reflects the current institutional baseline, where several practices are informal or ad-hoc, and therefore prioritises gradual formalisation, scaling, and long-term embedding.

The four implementation phases are aligned with the defined objectives across all pillars. Initial efforts focus on establishing governance structures, defining frameworks, and consolidating baseline practices, particularly in areas such as ethics training, OTM-R compliance, and career development systems. This is followed by the rollout of key measures, including training programmes, formalised recruitment procedures, and the introduction of IDPs.

In later phases, emphasis is placed on integrating these measures into regular institutional processes, monitoring KPI progress, and ensuring consistency across teams. The final phase focuses on full institutionalisation, where policies, training systems, and HR practices become embedded within organisational structures and supported through long-term planning and resource allocation.

3.3.1 IMPLEMENTATION ROADMAP (STRATEGIC LEVEL)

Institutional SAP Roadmap

Phase	Timeframe	Key focus	Key staff to be included	Main measures implemented	Expected outcome
Initiation	Year 1	Establish governance, define frameworks, and consolidate baseline practices across all four pillars	Management team, ESR representatives, finance/administrative unit	Definition of GDPR & ethics training framework; initial OTM-R compliance structure; mapping of autonomy and well-being practices; design of IDP framework for researchers	Clear institutional baseline established; governance structure in place; priority gaps formally identified and translated into structured frameworks
Rollout	Years 1–3	Implementation of core measures and activation of institutional practices across pillars	Management team / team leads, ESRs, external trainers where needed	Launch of GDPR & ethics training programmes; development and application of recruitment rulebook (OTM-R); implementation of training and well-being programmes; introduction of IDPs across research staff	Increased participation in training (>20%); partial formalisation of recruitment and HR processes; improved support structures for researchers; initial adoption of IDPs
Consolidation	Years 3–4	Integration of practices into regular institutional processes and monitoring of KPIs	Management team, finance/admin unit	Monitoring and evaluation of KPIs; refinement of training programmes; adjustment of recruitment and career progression procedures; strengthening of well-being and autonomy measures; scaling IDP implementation	Measurable progress toward targets (e.g. ~50% implementation levels); improved consistency across departments; more structured and predictable HR practices

Institutionalisation	Years 4–5	Full embedding of measures into institutional policies, systems, and long-term planning	Management team, finance/admin unit	Formal adoption of policies (ethics, OTM-R, HR development); integration into HR systems and budgeting; continuous training cycles; full rollout of IDPs and monitoring protocols	Sustainable, fully embedded HR system aligned with SMART objectives; ≥50%+ training coverage; 100% formalised processes; long-term institutional capacity strengthened
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3.4 HUMAN CAPACITY AND STRUCTURAL ENABLERS

3.4.1 HUMAN RESOURCE ALIGNMENT

Institutional roles for SAP delivery

Role / Function	Core responsibility	Competency Profile	Institutional unit
CEO, SAP Coordinator	Overall coordination of SAP implementation; ensures alignment between pillars; oversees strategy, timeline, reporting, and communication with project partners	Project management, understanding of ERA/HRS4R frameworks, coordination and reporting skills	CEO, Head of Operation and Management team
Pillar 1 Lead	Leads development and implementation of GDPR and ethics training; supports Open Science practices and related guidelines	Knowledge of research ethics, GDPR, Open Science principles; training design and coordination	Management / team leads
Pillar 2 Lead	Responsible for formalisation of recruitment and assessment procedures; development and implementation of rulebook aligned with OTM-R principles	HR processes, recruitment practices, policy development, understanding of OTM-R principles	Management /team leads
Pillar 3 Lead	Oversees implementation of autonomy and well-being measures; supports development of training programmes and internal support mechanisms	Organisational development, well-being practices, team management, internal communication	Management/ team leads
Pillar 4 Lead	Leads introduction and monitoring of IDPs; supports career development structures and researcher support mechanisms	Career development frameworks, mentoring systems, researcher support, planning and monitoring	Management team/team leads

Administration & Finance Support Function	Supports formalisation of contracts, recruitment procedures, compliance, and documentation processes related to SAP implementation.	Administrative processes, labour compliance, recruitment support	Management / administrative unit
Monitoring & data officer	Tracks KPIs, monitors progress across all pillars, collects and analyses data for reporting and evaluation	Data analysis, KPI tracking, evaluation, reporting	Management / administrative unit/ FSH SMART Researchers staff

3.5 GOVERNANCE AND DECISION STRUCTURE

3.5.1 GOVERNANCE MODEL

SAP governance structure

Role	Function	Decision authority	Reporting line
CEO	Strategic oversight	Approves annual SAP updates	-
SAP coordinator	Coordination and monitoring	Validates KPI changes	Reports to CEO.
Management team, finance/admin unit	Operational delivery	Accountable for objectives	Reports to SAP Coordinator
Management team, finance/admin unit	Career system implementation	Responsible for Pillar 4	Reports to SAP Coordinator
Management / admin unit	Consultative input	Advisory	Reports to SAP Coordinator and CEO.

3.5.2 REVIEW AND DECISION CADENCE

Review framework

Review type	Frequency	Responsible body	Output
Operational review	Annual	SAP Coordinator + Management team	KPI tracking updates, identification of implementation gaps, short progress reports
Strategic SAP review	Annual	Management team	Annual SAP progress report, validation of progress, adjustment of priorities if needed
Mid-term review	Year 3	Management team	Formal assessment of KPI achievement vs interim targets; decision on corrective measures and scaling
Final review	Year 5	Management team	Final evaluation of SAP implementation; validation of target achievement and recommendations for continuation

3.5.3 RISK ESCALATION AND CORRECTIVE MECHANISM

Escalation logic

Risk Level	Trigger	Escalation path	Corrective window
Moderate	Minor delays in KPI progress (incomplete internal reports, postponed meetings, or delays in routine implementation activities)	Pillar Lead → management team	3–6 months
High	Significant delays in KPI progress (repeated missed deadlines, or slower rollout of planned measures)	Pillar Lead → CEO	3–6 months
Critical	Critical delays in KPI progress (major reporting delays, or inability to meet SAP milestones)	Pillar Lead → CEO	Immediate action; resolution within 3 months

4. MONITORING, EVALUATION AND POLICY FEEDBACK

The Strategic Action Plan (SAP) is monitored through a structured three-level framework:

1. **Operational KPI Monitoring (Are we delivering what we committed?)**
2. **Benefits Realisation Tracking (Is the institution improving structurally?)**
3. **Policy Feedback and Regulatory Alignment (Is SAP influencing institutional and ERA-level frameworks?)**

Monitoring is directly linked to the SMART objectives defined under each pillar (Section 3.1) and follows the governance and review cadence defined in Section 3.5.

The system is designed to ensure clarity, feasibility, and institutional accountability without administrative overburden.

4.1 KPI MONITORING (OPERATIONAL LEVEL)

KPI monitoring tracks the implementation of objectives under each SAP pillar. Each SMART objective is supported by at least one measurable indicator.

KPI monitoring overview

Pillar	Objective reference	KPI	Monitoring tool / data source	Reporting Frequency	Responsible Role
Pillar 1	GDPR & ethics knowledge improvement	30%+ staff trained by 2031	Training attendance records	Annual	Pillar 1 Lead
Pillar 2	Operationalisation of OTM-R compliance	100% formalised protocols by 2031	Recruitment documentation, admin records, OTM-R checklist system	Annual	Pillar 2 Lead
Pillar 3	Implementation of autonomy and support programmes	80% of staff is fully autonomous in work by 2031	Staff survey, internal operations monitoring tools	Annual	Pillar 3 Lead
Pillar 4	Implementation of Individual Development Plans (IDPs)	100% of researchers with IDPs	IDP templates, supervisor records, internal tracking system	Annual	Pillar 4 Lead

Monitoring output:

- Annual SAP Implementation Review Report
- Mid-term review (Year 3)
- Final evaluation (Year 5)

4.2 BENEFITS REALISATION TRACKING (INSTITUTIONAL LEVEL)

While KPIs measure activity completion, benefits tracking assesses whether structural improvements are occurring.

Institutional Benefits Tracking

Expected institutional benefit	Indicator	Measurement source	Target year
Improved researcher satisfaction with working conditions and support mechanisms	Average satisfaction level reported in annual staff/researcher survey	Internal staff and researcher survey	2031
Strengthened institutional capacity for researcher and staff career development support	Integrating IDPs, training pathways, mentoring into institutional practice	Internal monitoring reports and management review	2031
Integration of ResearchComp into HR and staff development framework	Level of ResearchComp integration into training and staff development	Training curriculum documentation, internal policy updates	2031

4.3 POLICY FEEDBACK AND ALIGNMENT (STRATEGIC LEVEL)

SAP functions as both an internal development instrument and a mechanism for alignment with European research career frameworks and ERA priorities. SAP outcomes are systematically used to inform internal governance, contribute to external reporting processes, and strengthen institutional positioning within the European Research Area (ERA).

Policy feedback mechanism

SAP output	Institutional integration mechanism	External feedback channel	Review frequency
Updates to internal HR and OTM-R-related procedures and staff development practices	Updates to internal HR and OTM-R-related procedures and staff development practices	Sharing through Horizon Europe project reporting and consortium discussions (where relevant)	Annual
Researcher development outcomes (IDPs, training, mobility)	Integration into internal staff development framework and planning processes	Discussion and benchmarking within Horizon Europe partnerships	Annual

Ethics, Open Science, and ResearchComp implementation results	Updates to internal training, onboarding, and competence development systems	Participation in ERA-related communities and dissemination activities (non-formal)	Annual
Overall SAP evaluation (mid-term and final)	Strategic revision of institutional priorities and governance adjustments	Sharing of results in European project dissemination channels and stakeholder events	Annual

SAP implementation will be monitored through structured performance tracking aligned with ERA principles.

5 REFERENCES AND RELATED DOCUMENTS

5.1 REGULATORY AND POLICY FRAMEWORKS REFERENCED

The SAP is aligned with the following EU, international, and institutional frameworks:

- [Council Recommendation on a European Framework for Research Careers](#)
- [European Charter for Researchers](#)
- [ERA Policy Agenda 2025-2027 | European Research Area Platform](#)