Institute of Economics
Polish Academy of Sciences

HUMAN RESOURCES STRATEGY FOR RESEARCHERS at the Institute of Economics, Polish Academy of Sciences

Warsaw, 2024

Spis treści

INTRODUCTION **4**

1. CHARACTERISTICS OF THE INSTITUTE OF ECONOMICS, POLISH ACADEMY OF SCIENCES (IE PAS) **6**

1.1. General information 6
1.2 The Institute's Mission 6
1.3 Historical Outline 7
1.4 Strategic Goals 8
1.5 Research Profile of the Institute 8
1.6 Employment 10
1.7 Organizational Structure 11
1.8 Funding of Scientific Activities 11
2. Methodology 12
2.1 Legal Basis for Actions 12
2.2 Declaration of Support for the Guidelines of the European Charter for Researchers and the Code of Conduct for the Recruitment of Researchers 13
2.3 Scope of the Teams' Work 13
2.4 Survey 14
2.4.1 Representativeness of the Survey and Characteristics of Respondents *14*
2.4.2 Processing of Survey Results *14*
2.5 Analysis of legal acts, including internal regulations, procedures, and key documents in force at IE PAS 26

3. STRENGTHS AND WEAKNESSES OF PRACTICES AND REGULATIONS AT IE PAS **29**

3.1 Strengths 30
3.2 Weaknesses 38

4. ACTION PLAN **44**

5. Implementation and Monitoring of the Strategy 67
5.1 Development and Implementation of the OTM-R Policy 67
5.2 Implementation of the Principles of the European Charter for Researchers and the Code of Conduct for the Recruitment of Researchers 70
5.2.1. Actions Supporting the Implementation of the HRS4R Strategy *70*
5.2.2. Monitoring of HRS4R Implementation Progress by the Monitoring Team *73*
5.2.3. Engagement of Key Stakeholders in the HRS4R Implementation Process *74*
5.2.4. Alignment of Organizational Policies with HRS4R Principles *75*
5.2.5. Ensuring the Implementation of Proposed Actions *76*
5.3. Schedule for Monitoring Progress and Evaluating the Effectiveness of HRS4R Implementations 77

SUMMARY 88

ANNEX NO. 1- GAP ANALYSIS 90

ANNEX NO. 2 OPEN, TRANSPARENT AND MERIT-BASED RECRUITMENT (OTM-R) CHECKLIST 120

INTRODUCTION

This document outlines the Human Resources Strategy for Researchers employed at the Institute of Economics, Polish Academy of Sciences. In developing this strategy, a set of 40 principles from the European Charter for Researchers (*Charter*) and the Code of Conduct for the Recruitment of Researchers (*Code*), developed and published by the European Commission on March 11, 2005, were used. Their primary goal is to ensure friendly working conditions and career development for researchers, as well as transparent and unified, at the European level, principles for the recruitment of researchers. These principles reflect the European Commission's desire to accelerate the processes of European integration in the research sector and the development of the European Research Area by creating an attractive working environment for researchers, their mobility, and adherence to ethical standards in professional relationships. They are addressed to actors in the research sector: researchers, their employers, and institutions supporting their development, including grant providers. The application of EU principles is intended to lead to increased attractiveness and harmonization of working conditions and employment of researchers in the European research sector in a way that promotes the development of knowledge in Europe.

The principles contained in the European Charter for Researchers define the requirements for the role, methods, and forms of acquiring, disseminating, and developing knowledge, and formulate the scope of duties and rights of researchers, their employers, and/or grant providers. They aim to ensure that relations between researchers and their employers and/or grant providers promote the development and dissemination of knowledge and the development of researchers.

In turn, the Code of Conduct for the Recruitment of Researchers contains general principles and requirements that employers and/or grant providers should comply with when appointing, recruiting, and selecting researchers. Their observance is to guarantee the transparency of the recruitment and selection process of researchers and equal treatment of all candidates. The principles of the Code are complementary to the principles of the Charter.

The importance of both documents has also been recognized by the Ministry of Science and Higher Education. Guided by the desire to develop the Polish research sector and its integration with the European Research Area, in April 2015, it was recommended to

implement the principles contained therein into the human resources strategies implemented by research institutions, scientific and educational institutions, and grant providers.

On January 5, 2024, after familiarizing herself with the documents of the European Commission, the Director of the Institute of Economics, Polish Academy of Sciences, Urszula Skorupska PhD, expressed her support for the recommendations of the European Commission No. 2005/251/EC. She also pointed to the need to implement the principles contained therein into the Institute's human resources strategy.

On January 16, 2024, the European Commission informed the Institute about the initiation of a procedure conditioning the inclusion of IE PAS in the group of scientific units supporting the provisions of the Charter and the Code. The first stage of this procedure is the preparation by the Institute, in accordance with the requirements of both documents, of the HR Strategy for Researchers ("HRS4R") and the submission of a declaration of compliance with the provisions adopted therein.

The work on developing the Strategy presented in this document was preceded by a thorough analysis of the principles contained in the Charter and the Code, combined with an assessment of the legal conditions and practices existing in the Institute. This made it possible to determine the characteristics of the Institute, identify existing gaps and indicate the strengths and weaknesses of past practices and regulations. On this basis, a draft Institute Strategy was developed, adapted to the requirements of the European Human Resources Strategy for Researchers (The Human Resources Strategy for Researchers - HRS4R). This project also includes a proposal for necessary changes in internal regulations and practices.

1. Characteristics of the Institute of Economics, Polish Academy of Sciences (IE PAS)

1.1. General information

The Institute is a small research unit with category A, which confirms the high level of scientific research conducted.

Institute of Economics, Polish Academy of Sciences	
Classification of the entity according to the Public Finance Act	Polish Academy of Sciences and its organizational units
Institute category	Category A in the discipline of economics and finance, awarded by the decision of the Minister of Education and Science on January 26, 2023
Establishment date	The Institute of Economics, Polish Academy of Sciences was established on the basis of the resolution of the Presidium of the Polish Academy of Sciences of December 10, 1980, approved by the Prime Minister on January 5, 1981. It obtained legal personality by the decision of the President of the Polish Academy of Sciences on October 7, 1999.
IE PAS Management	Urszula Skorupska PhD, Director Professor Andrzej Szablewski, Deputy Director for Scientific Affairs
Presidium of the Scientific Council of IE PAS	Stanisław Gomułka PhD, Corresponding Member of the PAS, Chairman Krzysztof Bartosik, PhD, DSc, Deputy-Chairman Andrzej Kondratowicz, PhD, DSc, Deputy-Chairman Tomasz Łyziak, PhD, DSc, Deputy-Chairman
Address of the headquarters	Staszic Palace, Nowy Świat 72 Street, 00-330 Warsaw, Masovian Voivodeship, Poland
Contact information	Phone: (22) 657-27-07 E-mail: inepan@inepan.waw.pl Website: www.inepan.pl Electronic mailbox (ePUAP): /INEPAN/dn e-Delivery: AE:PL-11243-73768-WDHFV-28
Register of Scientific Institutes of the Polish Academy of Sciences	RIN-I39-99
NIP	5250008991
REGON	000874638

1.2 The Institute's Mission

The Institute of Economics, Polish Academy of Sciences aims to analyze the mechanisms of socio-economic development, identify conditions for maintaining high growth in

the Polish economy, increase prosperity and improve the quality of life for residents, and diagnose economic problems for the purposes of economic and social policy-making.

The Institute fulfils its mission by conducting rigorous, scientifically excellent research in economic theory and policy, and more recently, in management theory and practice. In recent years, research programs at the Institute have increasingly relied on advanced quantitative methods and collaboration with foreign research centers. Their results are published in recognized, highly ranked foreign journals, as well as presented at foreign and domestic conferences and scientific seminars.

The Institute also initiates discussions and popularizes knowledge about important and current issues and challenges in economics and economic policy. A crucial aspect of fulfilling this mission is the continuous improvement of human resource management, particularly by supporting employee development and creating an inspiring work environment. Our goal is to provide a work environment where every employee feels empowered to choose their research topic and methodology, and has the opportunity to utilize their intellectual potential and demonstrate innovation in achieving scientific goals.

1.3 Historical Outline

Established in 1980, the Institute of Economics, Polish Academy of Sciences (IE PAS) is a research center specializing in economic theory and socio-economic policy. Since its founding, it has been recognized as one of the top economic academic centers in Poland. IE PAS carries on the tradition of economic research conducted at the Institute of Economic Sciences of the Polish Academy of Sciences (ZNE), established in 1953. Among ZNE's employees was the world-renowned economist Michał Kalecki, who headed the Department of Research on the Capitalist Economy from 1955 until his death in 1970.

The first director of the Institute, established based on the resolution of the Presidium of the Polish Academy of Sciences of December 10, 1980, approved by the Prime Minister on January 5, 1981, was Józef Pajestka. The Institute gained legal personality through a decision of the President of the Polish Academy of Sciences on October 7, 1999.

In the initial years following its establishment, the Institute employed prominent academic economists who, due to their political and scientific views, were removed from teaching positions at universities after the imposition of martial law in 1981. Their research on the

necessity and direction of economic reforms naturally led them to participate in the process of systemic transformation. They began to be appointed to public service at various levels, including the highest, of state and local administration, and served as advisors and experts.

The list of former IE PAS employees is too extensive to mention all the positions they held and functions they performed. It can only be noted that among them were: a prime minister and two deputy prime ministers, the president of the National Bank of Poland, numerous ministers and deputy ministers, heads of central offices, the mayor of Warsaw. This, considering the relatively small number of Institute employees, should be seen as a testament to its exceptional character.

1.4 Strategic Goals

For several years, IE PAS has been undergoing a deep transformation that began in 2015 and is based on the consistent implementation of a comprehensive action plan aimed at achieving two strategic objectives. Firstly, the further strengthening of the Institute's scientific position at both the national and international levels. This is to be achieved through changes in the employment structure, rejuvenation of the scientific staff, and the implementation of a systematic approach to encouraging scientific and research activities, as well as organizational support for these activities. Secondly, the strengthening of the Institute's position and recognition within the national academic community of economists, as well as among economic administration, expert circles, and business environments. One expression of the Institute's enhanced scientific standing has been the significant recent increase in the number of publications in highly regarded international publishing houses.

1.5 Research Profile of the Institute

The Institute's research activities are structured across four research units: the Department of Economic Policy, the Inequalities Research Center, the Research Laboratory of Advanced Studies, and the Center of Process and Network Analysis. In recent years, the research profile of the Institute, which was previously quite dispersed, has begun to focus on specific key research directions that are both theoretically and practically significant. These areas of research are pursued within teams formed by the Institute's outstanding researchers.

The first research team deals with broadly understood inequality issues, focusing especially on methodologies for measuring inequality, well-being, and mobility. Their work also examines the impact of social and economic policies on inequality, analyzes historical trends in this area, explores the macroeconomic implications of inequality, and studies inequality in the field of health.

The second team conducts research on macroeconomic expectations, particularly the mechanisms through which these expectations are formed in the economy, taking into account the influence of monetary and fiscal policy. Their research also examines the impact of these expectations on macroeconomic aggregates. As part of this work, they develop methods for measuring fiscal stability, monetary policy credibility, and analyze inflationary processes and their determinants. Parallel to this, research is conducted on the impact of shocks on the innovation activities of enterprises and their development, as well as on the resilience of firms to shocks and their adaptive capacities in rapidly changing external conditions.

The third team focuses on finance, with a particular emphasis on corporate governance, banking, and the role of new technologies in financial intermediation. This research is interdisciplinary, combining elements of finance, banking, and the agri-food sector, with a focus on climate change and its impact on the financial sector.

The fourth team studies the impact of inter-organizational networks, digital innovation hubs, and ecosystems on sustainable development, digital transformation, and innovative business models in the digital era. The research utilizes advanced techniques of social network analysis in the dynamic digital economy and sustainability landscape. This research includes an analysis of economic systems such as industry clusters, innovation networks, and food cooperatives, viewed from the perspective of network structures and relational approaches.

The fifth team is engaged in research aimed at developing new multi-agent models and using them to simulate the potential impact of public policies on the economy, the financial system, and society. Their work focuses on financial stability, systemic risk, and the effects of macroprudential tools on social welfare. Increasingly, the team aims to incorporate artificial intelligence tools into their research.

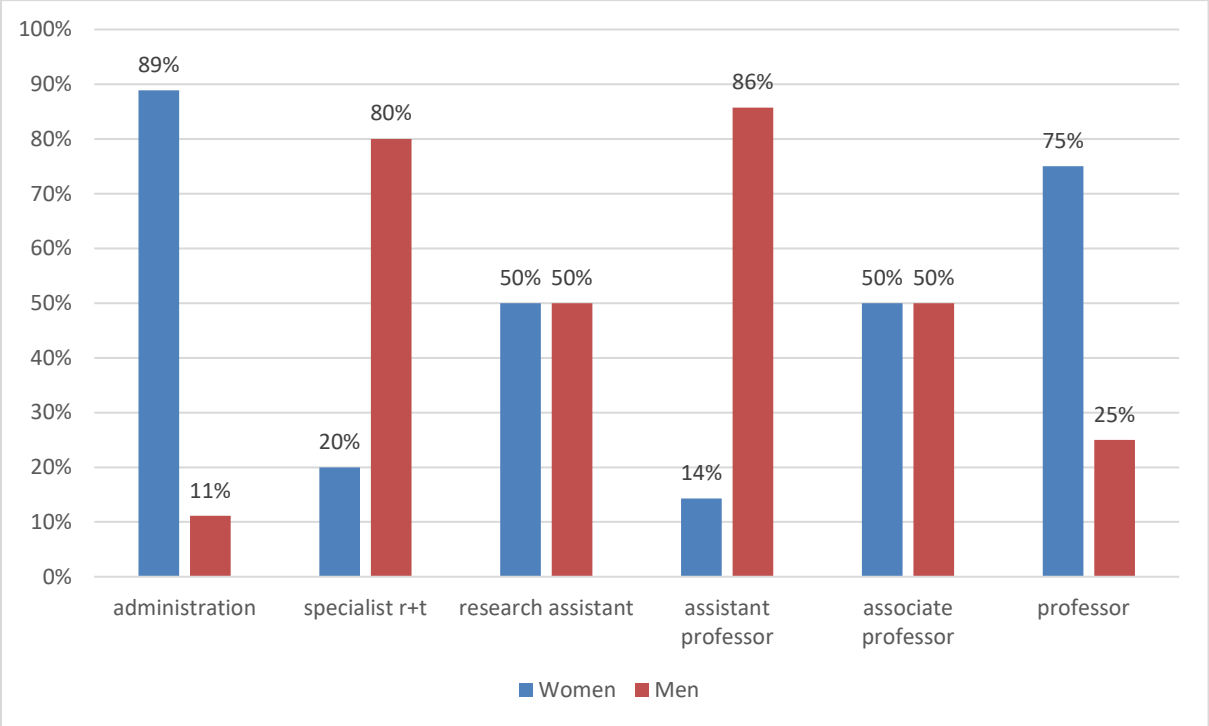
IE PAS collaborates with numerous foreign research institutions, including Oxford University, the University of Amsterdam, Aarhus University, Loughborough University, the University of Cambridge, the London School of Economics, the University of Vienna, and PUCP Business School (Lima, Peru). This cooperation facilitates the exchange of knowledge and experiences and enables participation in global discussions on key economic challenges.

1.6 Employment

As of December 31, 2023, the Institute employs a total of 41 employees, including 32 research and research-technical staff, and 9 administrative staff. Among the research staff are 4 professors, 8 associate professors, 13 assistant professors, and 2 research assistants. Among the employees at IE PAS, men make up the majority (55%), while women represent 45% of the total workforce.

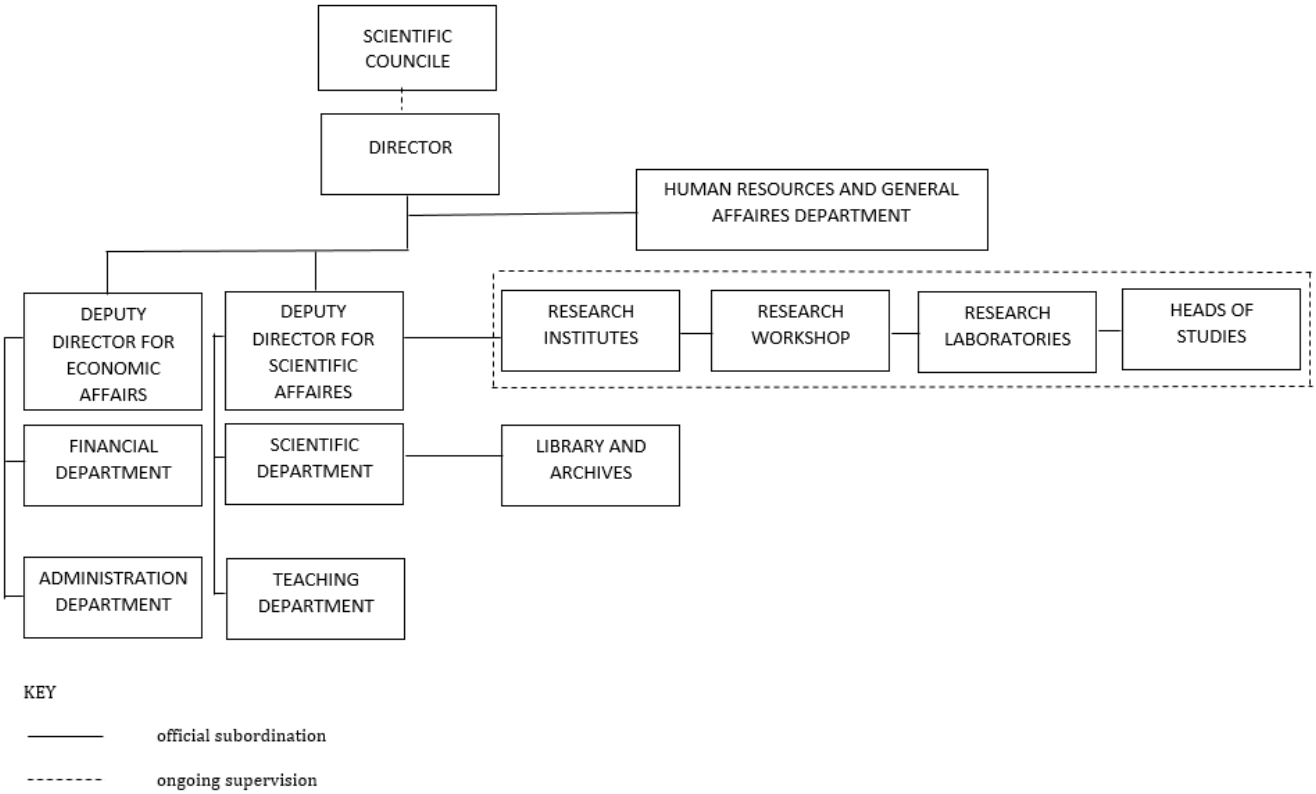
The employment structure by position and gender is shown in Chart 1.

Chart 1. Percentage of Women and Men by Position



1.7 Organizational Structure

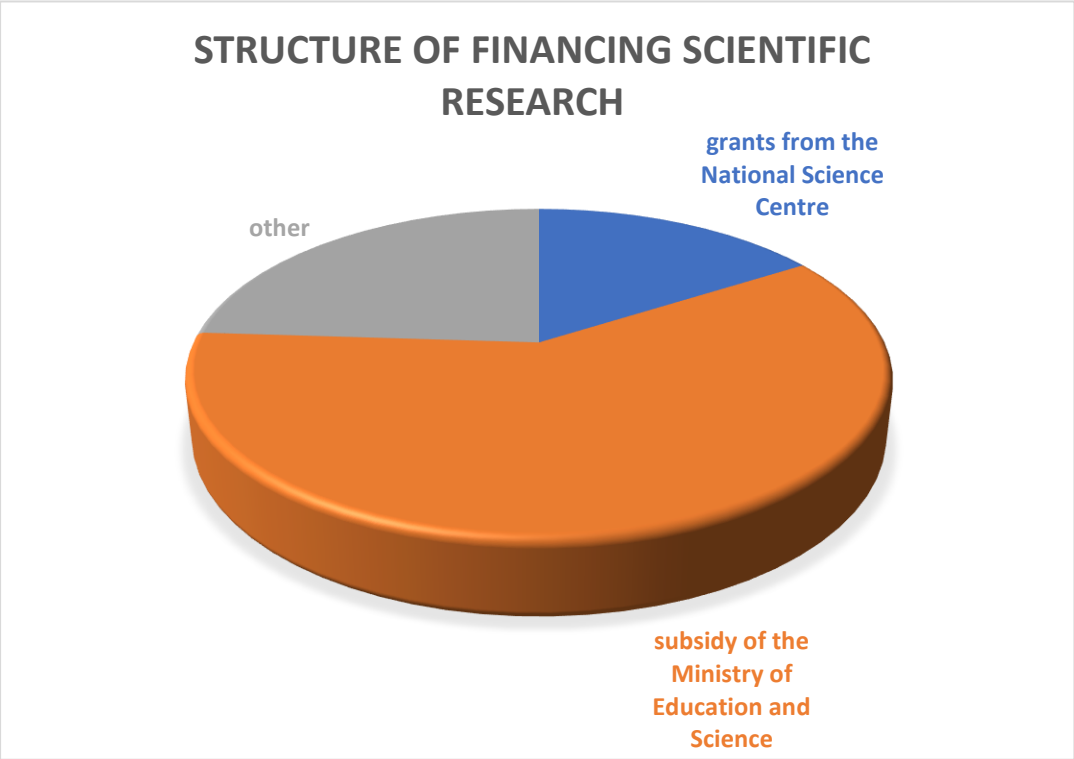
Chart 2. Organizational Structure of IE PAS



1.8 Funding of Scientific Activities

In 2023, 71% of the total revenue of the Institute of Economics, Polish Academy of Sciences, was allocated to funding scientific research, while the remaining 29% was used to cover the costs of the Institute's commercial activities. Expenditures on scientific activities significantly exceeded the annual budget subsidy provided by the Ministry of Education and Science. In 2023, these funds covered only 60% of the total costs incurred for research activities. The remaining research costs were covered by funds obtained from two sources: 16% were funded through grants from the National Science Centre, awarded to the Institute's employees through competitive procedures, and 24% were financed from other activities carried out by the Institute.

Chart 3. Structure of financing scientific research



2. Methodology

2.1 Legal Basis for Actions

To prepare the documents required for applying for the HR Excellence in Research award and to develop the HR Excellence in Research Strategy at the Institute of Economics, Polish Academy of Sciences, the Director of the Institute established two independent teams. The first team, established by Decision No. 36/2023 on October 11, 2023, is the Committee for Developing the Strategy for Enhancing Working Conditions and Career Development for Researchers, including an action plan for implementing the principles of the European Charter for Researchers and the Code of Conduct for the Recruitment of Researchers at the Institute. The committee includes:

1. Prof. Anna Wziątek-Kubiak – Chair
2. Dr Natalia Potoczek – Vice-Chair
3. Dr Marcin Borsuk – Member
4. Mgr Radosław Kurek – Member
5. Dr Tomasz Łyziak – Member

6. Dr Sylwia Radomska – Member
7. Mgr Joanna Pęczkowska – Member

The task of the Committee was to conduct a survey among the Institute's employees, analyze the gaps in the implementation of the principles outlined in the Charter and Code, and develop an action plan and strategy for implementing these principles.

The second body, established by Decision No. 40/2023 on October 26, 2023, was the Steering Committee, composed of:

1. Dr Urszula Skorupska – Chair, Director of IE PAS
2. Prof. Andrzej Szablewski – Member, Deputy Director for Scientific Affairs
3. Dr Anna Ujwary-Gil – Member

The Steering Committee's role was advisory, supporting the work of the Committee in developing the HR Excellence in Research Strategy and the documentation for the European Commission.

2.2 Declaration of Support for the Guidelines of the European Charter for Researchers and the Code of Conduct for the Recruitment of Researchers

After analyzing the Charter and Code—documents published by the European Commission—the Institute of Economics, Polish Academy of Sciences (IE PAS), on January 5, 2024, sent a declaration to the European Commission, expressing support for the principles outlined in these documents. The European Commission accepted the Institute's declaration on January 16, 2024.

2.3 Scope of the Teams' Work

The identification and analysis of existing gaps (GAP Analysis) at IE PAS were combined with an evaluation of the Institute's strengths and weaknesses. This evaluation was based on two sources of information. The first source was a survey concerning the 40 principles of the Charter and Code, compliance with which is required to obtain the HR Excellence in Research award. The second source was the analysis of legal acts, including internal regulations, procedures, and key documents in force at IE PAS, as well as the Institute's operational practices.

2.4 Survey

2.4.1 Representativeness of the Survey and Characteristics of Respondents

The aim of the survey was to gather assessments from employees of the Institute—including research, research-technical, and administrative staff—regarding the regulations, procedures, and practices in place at the Institute, specifically in areas covered by the principles and requirements of the Charter and Code. The survey was conducted from January 19 to 22, 2024. It was completed by 26 out of 29 employed researchers (89.6%), 3 out of 4 research-technical staff (75%), and 8 out of 9 administrative staff (88.9%). The survey met the requirement for representativeness, with a high response rate of 88.1%.

2.4.2 Processing of Survey Results

The survey questionnaire consisted of 52 questions addressing all 40 principles of the Charter and Code, divided into four thematic pillars. Due to the multi-faceted nature of some principles, more than one question pertained to specific principles. Respondents were asked to carefully read the statements in each question and assess to what extent they agreed with them. Their answers formed the basis for evaluating whether and to what extent the principles of the two EU documents were being followed at IE PAS.

The possible responses to the survey questions were as follows:

- Strongly agree (percentage of respondents selecting this answer: f1)
- Rather agree (percentage of respondents selecting this answer: f2)
- Don’t know (percentage of respondents selecting this answer: f3)
- Rather disagree (percentage of respondents selecting this answer: f4)
- Strongly disagree (percentage of respondents selecting this answer: f5)

To quantify the employees' assessments, the perception index of the extent to which each principle had been implemented was calculated for each question using a custom method. For the purposes of this document, we will refer to this as *the score*. It is calculated using the formula:

$$BS=5f1+4f2+3f3+2f4+f5$$

Depending on the distribution of responses to a given survey question, *the score* can take values from 1 to 5. Values close to 1 indicate that, in the opinion of IE PAS employees, the principle in question has not been implemented. Values close to 5 indicate a high perceived

degree of implementation. For principles associated with multiple survey questions, *the score* was calculated as the weighted average of the score statistics for individual questions, with weights assigned to each question.

The following thresholds were applied when evaluating whether survey responses indicated a gap:

- If *the score* for a given principle was less than 3.5, it was assumed that, in the opinion of IE PAS employees, the principle had not been implemented. Such values suggest a gap, regardless of the internal regulations or practices in place at IE PAS.
- For *the score* between 3.5 and 4.0, it was assumed that the principle had been partially implemented.
- If *the score* exceeded 4.0, it was assumed that the principle had been implemented.

For principles with *the score* above 4.0, further verification was conducted to determine whether the implementation of the principle could be considered complete (++) or almost complete (+-). This verification assessed whether, beyond good practices, there were complete and up-to-date internal regulations in place at IE PAS.

Two factors justified the choice of this method for processing survey results:

- Firstly, the custom score method is not a one-step process. It is further verified through an assessment of the distribution of respondents' answers.
- Secondly, the verification process relies on two threshold values, ensuring more cautious evaluation.

2.4.3 Survey Results

The survey results were divided into four pillars:

1. Ethical and professional aspects
2. Recruitment and selection
3. Working conditions and social security
4. Training and development

A total of 52 responses to survey questions were assigned to the 40 principles distributed across these four pillars. This means the number of survey responses exceeded the number of principles in each pillar. In cases where more than one survey question related to a single principle, a weighted average method was used to calculate the perception index for the implementation of that principle.

The perception indices for the degree of implementation of each of the 40 principles were first calculated using the method described above. The results for each thematic group (pillar) are presented in Charts 2 to 5. Subsequently, an analysis and verification of national and internal regulations was conducted (as presented in section 2.5). Comparing the results of this analysis with the survey scores reflecting perceptions of the implementation of principles, additional symbols were introduced to indicate whether and to what extent a principle had been implemented at IE PAS. These symbols, placed next to the principles under each chart, indicate the following:

++: The principle has been fully implemented, no further action required.

+-: The principle has been almost fully implemented, some action required.

-+: The principle has been partially implemented, action required.

--: The principle has not been implemented, action required.

I. Ethical and Professional Aspects

Chart 4. Responses to Questions on Ethical and Professional Aspects

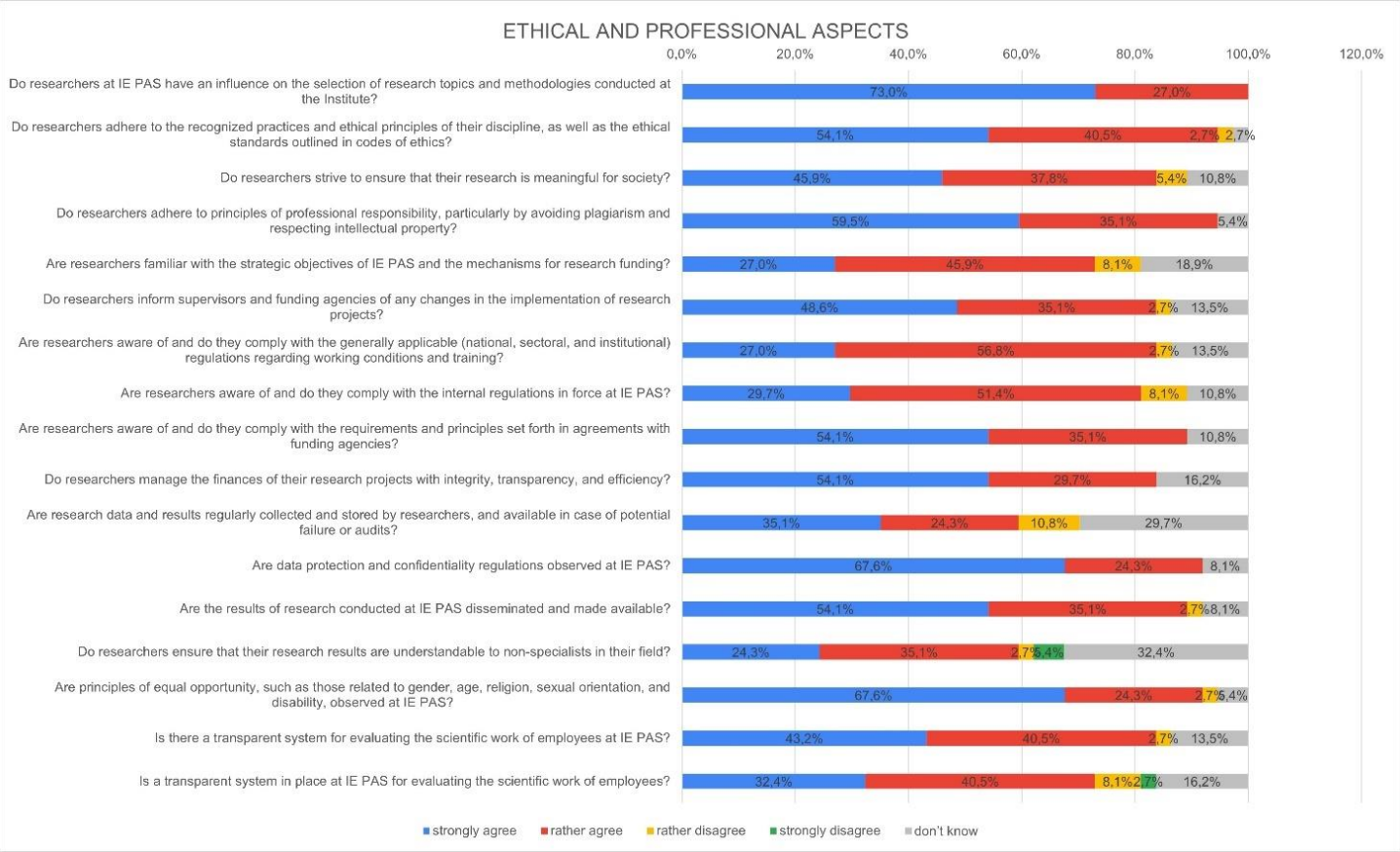
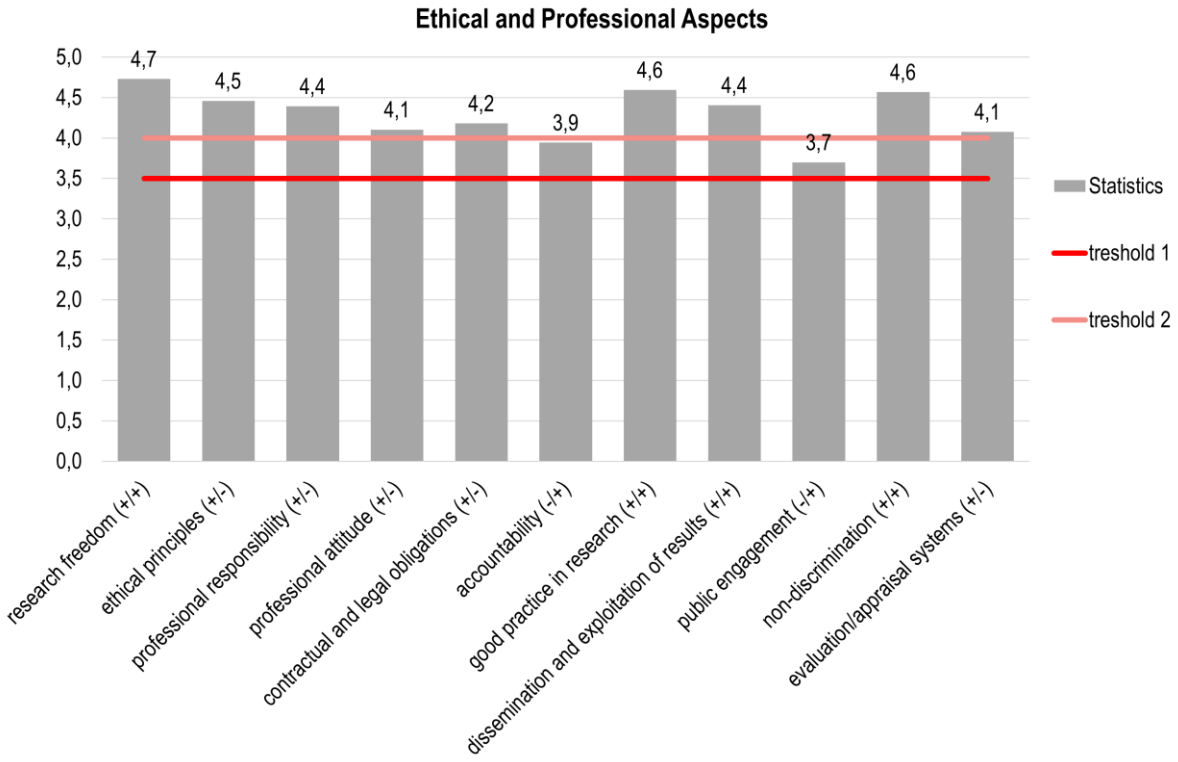


Chart 5. *The scores* for individual principles of Pillar I



In the opinion of the employees of IE PAS, the principles concerning ethical and professional aspects have been implemented to a satisfactory degree in most cases. This is particularly true for the following principles:

- Research freedom (*the score*: 4.7). According to 100% of IE PAS employees, the Institute guarantees researchers the freedom to choose their research topics.
- Ethical principles (*the score*: 4.5). A significant majority of employees (94.6%) believe that ethical principles are respected.
- Professional responsibility (*the score*: 4.4). Positive responses were given by 83.7% of respondents regarding the management of project finances and 94.6% regarding the collection and storage of research data and results.
- Professional attitude (*the score*: 4.1). Although this score is relatively high, it includes responses to a question about IE PAS's strategic goals, which, in the opinion of 27% of employees, are not well-known.

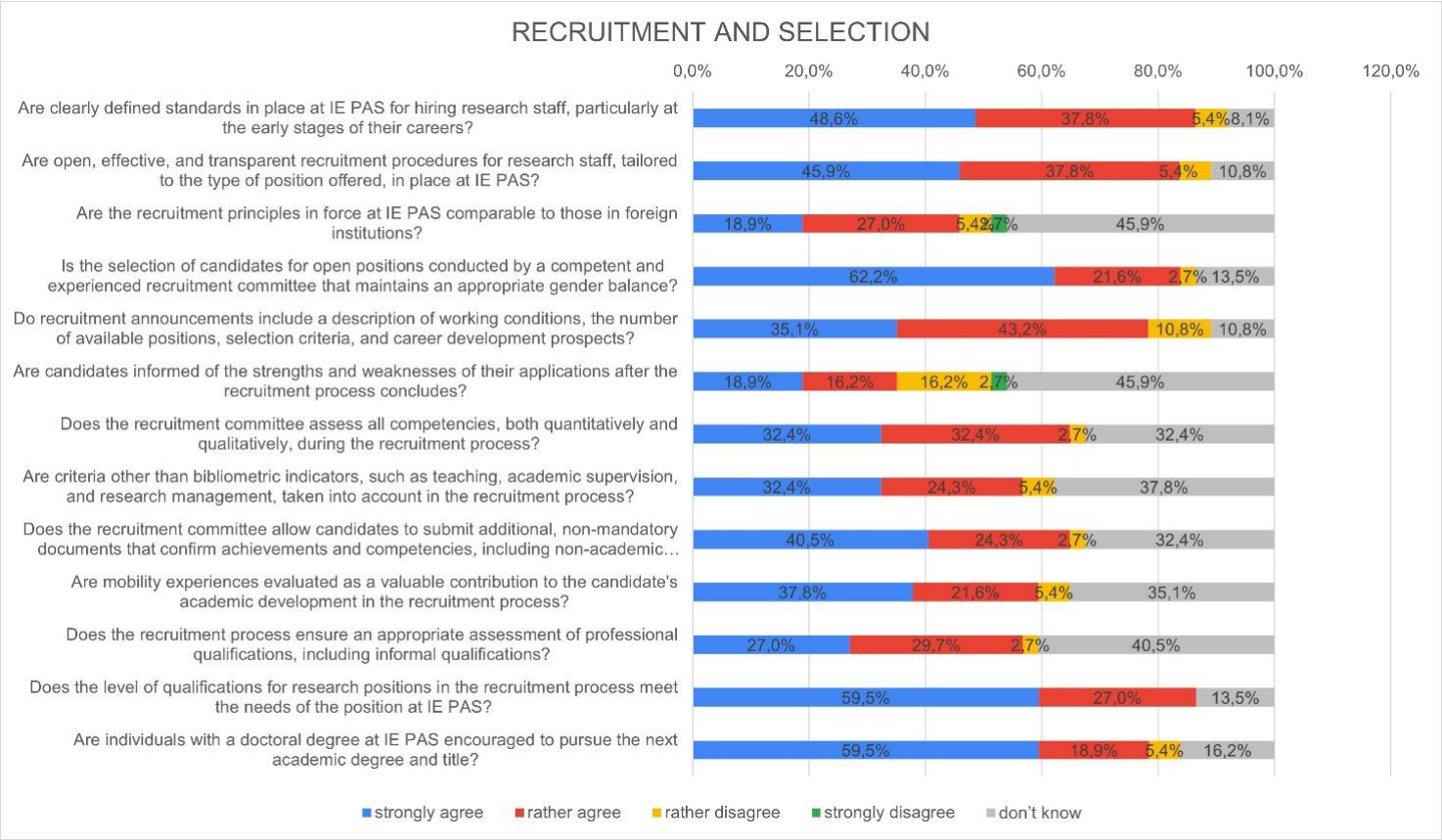
- Contractual and legal obligations (*the score*: 4.2). Positive responses were given by 83.8%, 81.1%, and 89.2% of employees, respectively, concerning compliance with legal obligations, including those related to contracts and project work.
- Good practice in research (*the score*: 4.6). The majority of respondents (91.9%) believe that good research practices are adhered to at IE PAS.
- Dissemination and exploitation of results (*the score*: 4.4). 89.2% of respondents confirm that research results are being disseminated and utilized.
- Non-discrimination (*the score*: 4.6). A significant majority (91.9%) of employees believe that there are no signs of discrimination in the workplace.
- Evaluation/appraisal systems (*the score*: 4.1). Despite the relatively high score, 27% of respondents gave negative or non-committal responses to questions about whether aspects such as research outcomes, administrative duties, and general scientific creativity are considered in the evaluation system.

The remaining principles concerning ethical and professional aspects require further implementation efforts. These include:

- Accountability (*the score*: 3.9). As many as 40.5% of respondents feel that research results are not consistently collected in a repository.
- Public engagement (*the score*: 3.7). In this case, 40.5% of employees believe that research results are not communicated in a way that is understandable to non-specialists.

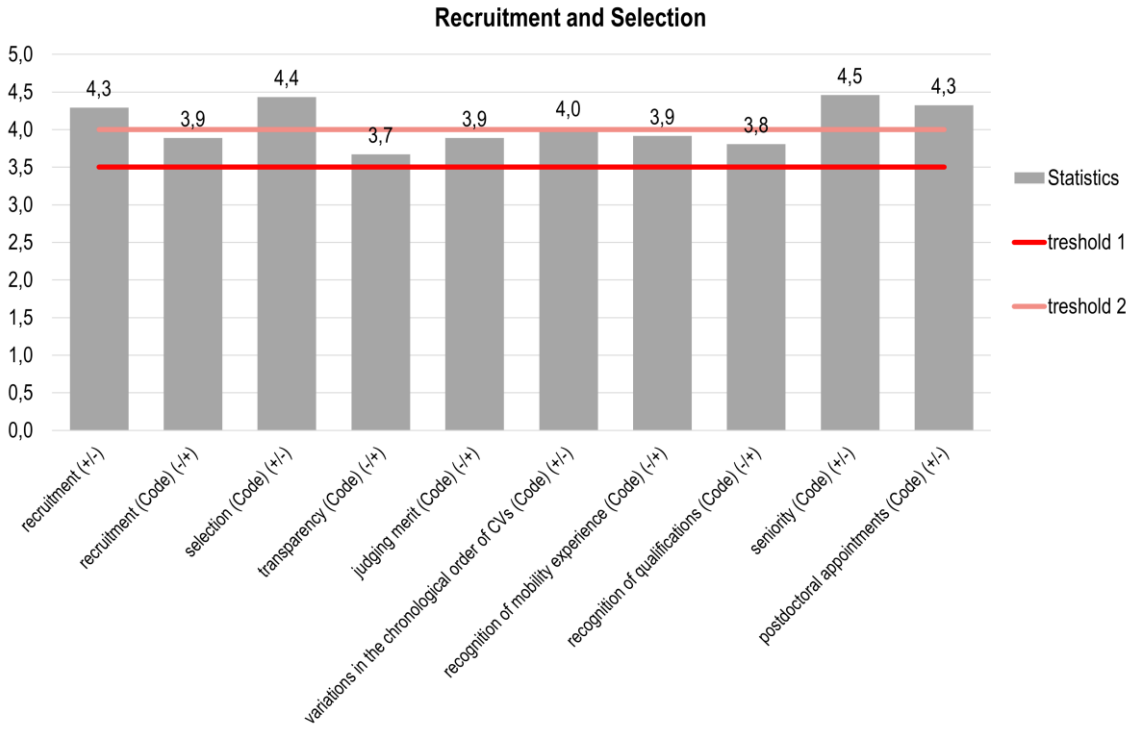
II. Recruitment and Selection

Chart 6. Responses to Questions Regarding Recruitment and Selection



The above 13 questions have been assigned to 10 principles of the second pillar.

Chart 7. *The Scores* for Each Principle of Pillar II.



The following principles related to the recruitment and selection of scientific positions at IE PAS are generally based on good practices and are viewed positively by employees:

- Recruitment (Charter) (*the score*: 4.3). 86.4% of respondents believe that clearly defined recruitment standards are in place at IE PAS, particularly at the early career stages.
- Selection (*the score*: 4.4). 83.8% of employees agree that the composition of selection committees ensures the necessary competencies, as well as gender balance during candidate evaluations.
- Variations in the chronological order of CVs (*the score*: 4.0). 64.8% of employees believe that the selection committee allows candidates to submit additional documents, such as non-academic achievements. However, 32.4% of respondents admitted a lack of knowledge on this topic.
- Seniority (*the score*: 4.5). 86.5% of employees think that the qualifications required for scientific positions correspond to the needs of those positions at IE PAS.
- Postdoctoral appointments (*the score*: 4.4). 78.4% of respondents feel that individuals with a PhD are encouraged to pursue further academic titles and qualifications.

However, the survey also revealed gaps in the recruitment and selection procedures at IE PAS. This is indicated by the respondents' lack of familiarity with certain aspects of the recruitment process, suggesting that IE PAS does not fully meet the requirements of the following principles:

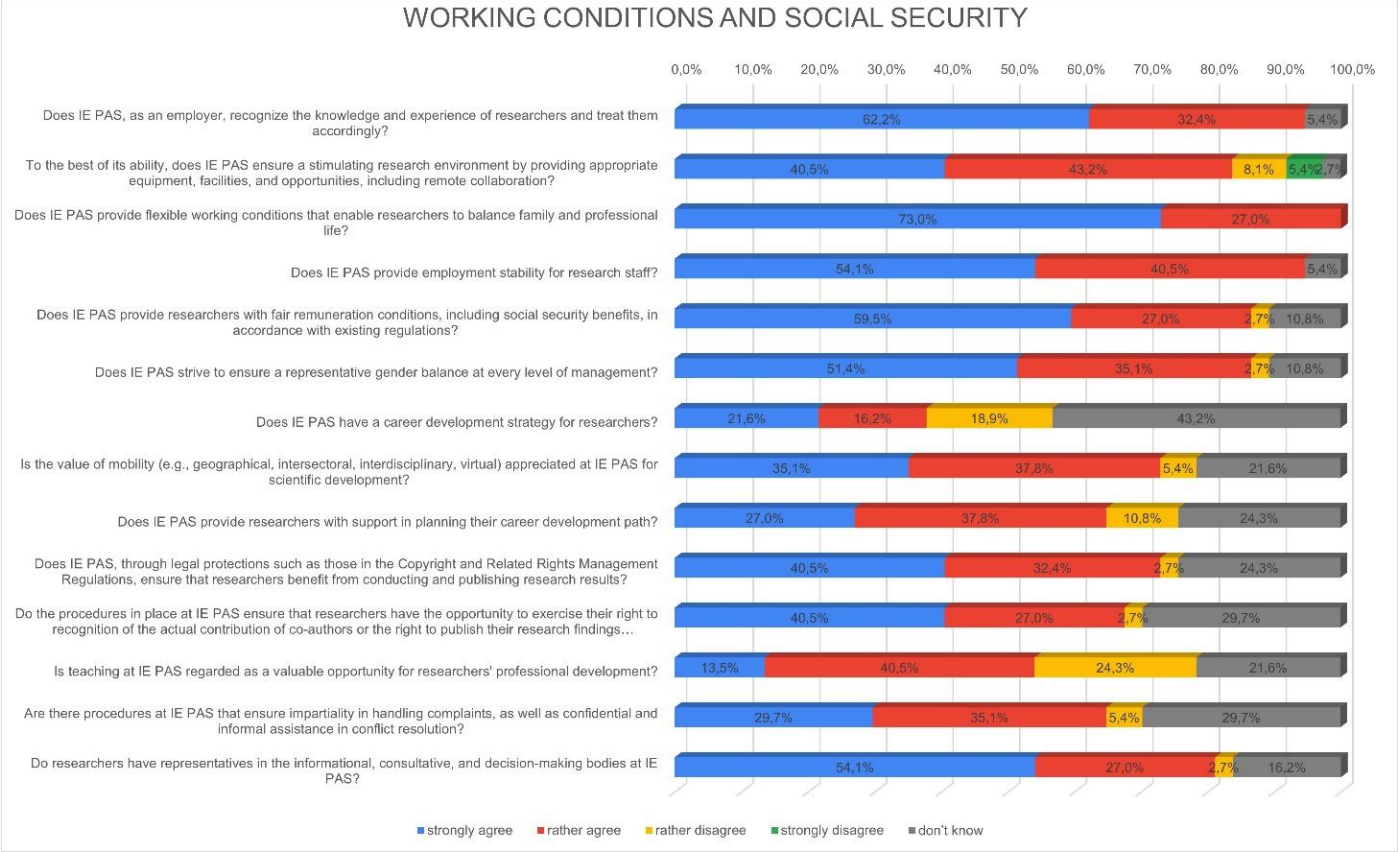
- Recruitment (Code) (*the score*: 3.9). A notable 45.9% of employees are unaware of whether recruitment standards at IE PAS are comparable to those in foreign research institutions.
- Transparency (*the score*: 3.7). Nearly half (45.9%) of the respondents do not know whether candidates are informed about their strengths and weaknesses, and 18.9% believe that they are not informed at all.
- Judging merit (*the score*: 3.9). A large proportion of employees (37.8%) do not know whether criteria beyond bibliometric indicators, such as teaching, mentoring, or research management, are considered in the recruitment process. Additionally, 32.4%

of employees are unsure whether the committee evaluates all competencies, both quantitatively and qualitatively.

- Recognition of mobility experience (*the score*: 3.9). Many employees (35.1%) are uncertain whether professional mobility is used as an evaluation criterion for candidates.
- Recognition of qualifications (*the score*: 3.8). A significant proportion of employees (40.5%) are unaware of how professional and informal qualifications are assessed by the selection committee.

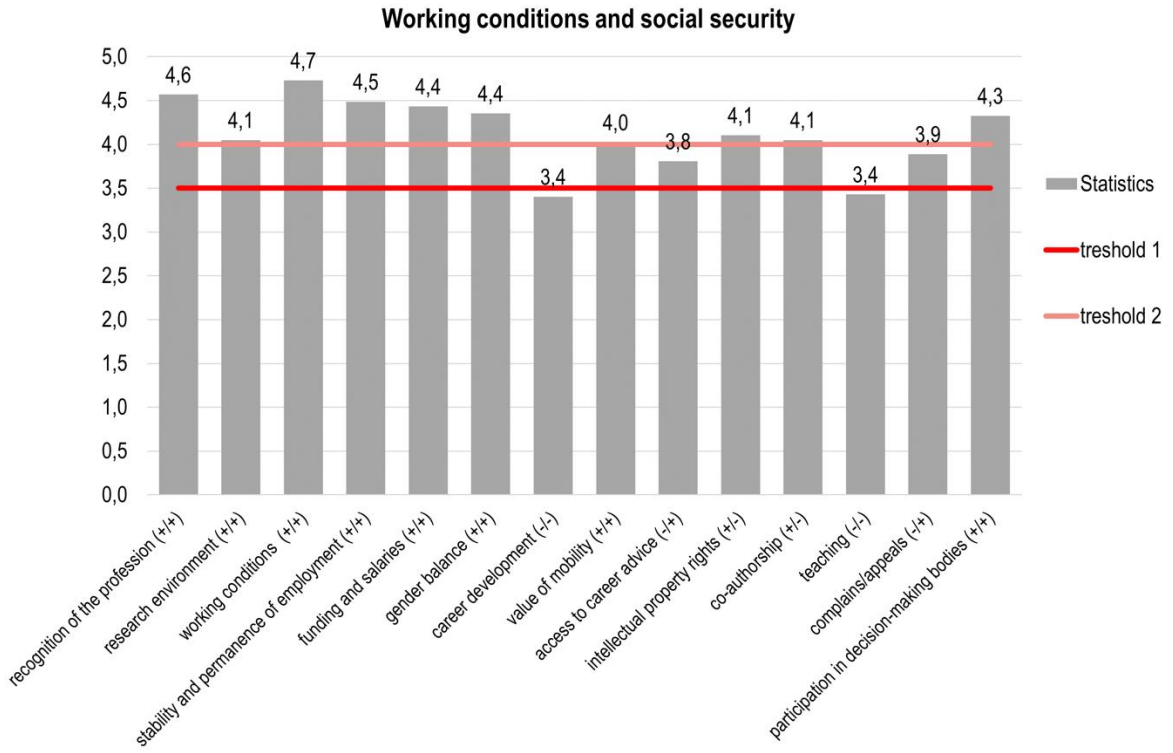
III. Working Conditions and Social Security

Chart 8. Responses to Questions Regarding Working Conditions and Social Security.



The above 14 questions have been assigned to 14 principles of the third pillar.

Chart 9. *The Scores* for Each Principle of Pillar III.



The principles related to working conditions and social security are, in the opinion of IE PAS employees, implemented to a satisfactory degree in most cases. This applies in particular to the following principles:

- Recognition of the profession (*the score*: 4.6). Nearly 94.6% of employees believe that IE PAS recognizes the knowledge and experience of researchers and treats them accordingly.
- Research environment (*the score*: 4.1). 83.7% of respondents feel that the Institute, to the best of its abilities, provides a stimulating research environment. This includes access to appropriate equipment, remote access to scientific databases (such as journal and data repositories), and licenses for software, as well as opportunities for remote collaboration.
- Working conditions (*the score*: 4.7). All respondents believe that the working conditions at IE PAS are flexible and allow researchers to balance their professional and personal lives.
- Stability and permanence of employment (*the score*: 4.5). A large majority (94.6%) of employees appreciate the stability of their employment at the Institute.

- Funding and salaries (*the score*: 4.4). A total of 86.5% of respondents feel that, in line with applicable regulations, IE PAS provides fair salary conditions along with social security benefits.
- Gender balance (*the score*: 4.4). 86.5% of employees believe that the Institute ensures gender balance at every level of management.
- Value of mobility (*the score*: 4.0). Positive opinions were expressed by 72.9% of respondents about the value of various forms of mobility (e.g., geographic, intersectoral, interdisciplinary, virtual) for scientific development.
- Intellectual property rights (*the score*: 4.1). A large proportion (72.9%) of employees agree that through legal protection, the Institute ensures that researchers benefit from conducting and publishing their scientific results.
- Participation in decision-making bodies (*the score*: 4.3). A high percentage (81.1%) of respondents feel that researchers are represented in the information, consultation, and decision-making bodies of the Institute.

At the same time, employees expressed concerns about the level of implementation of other principles related to working conditions and social security. The unsatisfactory evaluations in this area can be grouped into two categories. The first category is due to employees' insufficient knowledge of the implementation of specific principles and the existence of relevant internal documents:

- Employees are not fully aware that the Institute has a Code of Ethics for Researchers, which largely ensures the implementation of the principle of co-authorship. While the score for this principle is relatively high (4.1), 29.7% of respondents admitted that they lacked knowledge in this area.
- While researchers at IE PAS are not required to teach, there is a need to recognize teaching and the preparation of expertise for external institutions as part of professional development. *The score* for this principle is 3.4, suggesting that teaching should be more explicitly considered in the evaluation of researchers' activities.
- IE PAS has introduced internal procedures for handling complaints and appeals, ensuring impartiality in complaint handling and providing confidential, informal conflict resolution

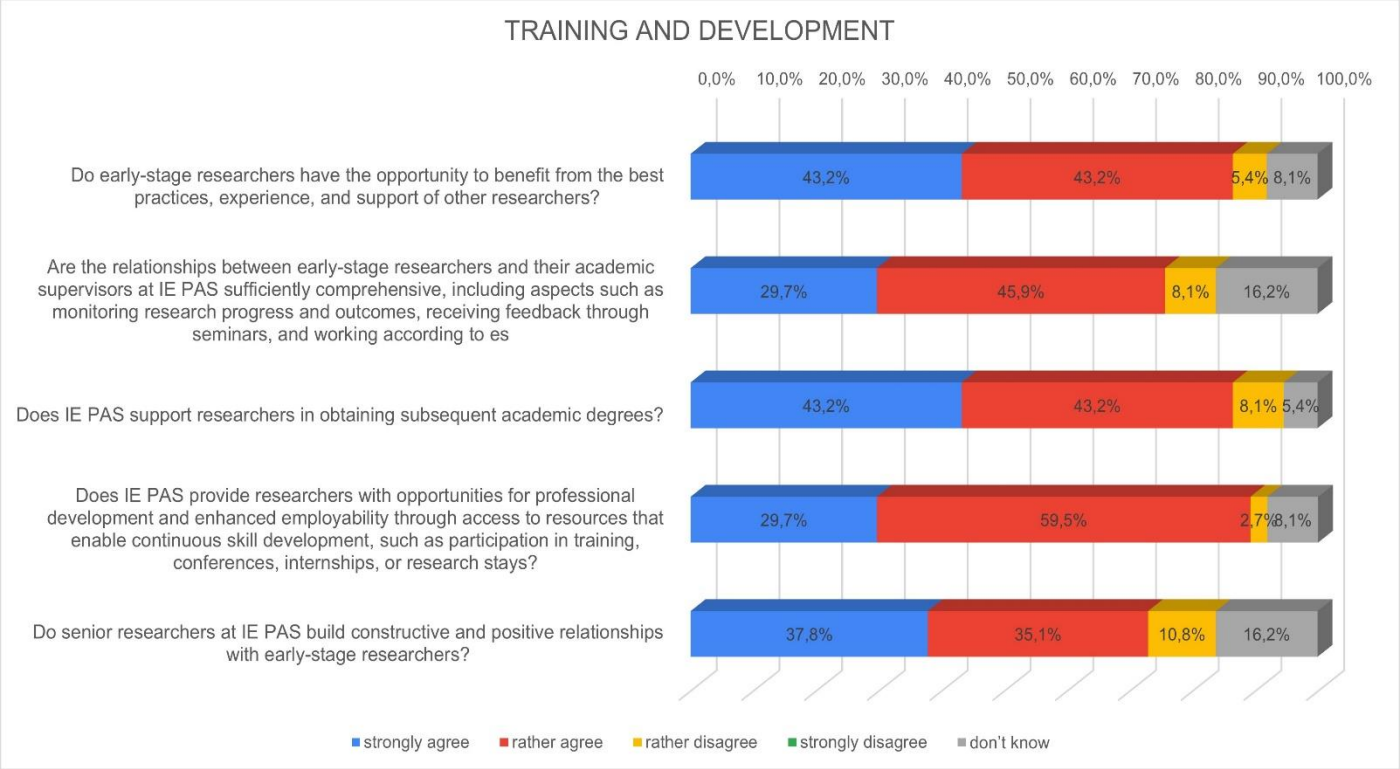
assistance. However, with a score of 3.9, employees report insufficient knowledge of these procedures and difficulty in accessing the relevant internal documents.

The second group of unsatisfactory responses relates to issues arising from the incompleteness of internal regulations and procedures. This applies to the following principles:

- Career development (*the score*: 3.4).
- Access to career advice (*the score*: 3.8).

IV. Training and Development

Chart 10. Responses to Questions Regarding Development and Training



The above five questions have been assigned to five principles of the fourth pillar.

Chart 11. *The scores* for Each Principle of Pillar IV.

The principles related to training and development are, in the opinion of IE PAS employees, implemented to a satisfactory degree. This applies especially to the following principles:

- Relation with supervisors (*the score*: 4.0). 75.6% of respondents believe that the relationships between early-career researchers and their supervisors are sufficiently broad. These relationships include the monitoring of research progress and outcomes, as well as receiving feedback through seminars or working according to established schedules. Only a small percentage (8.1%) of respondents disagreed.
- Supervision and managerial duties (*the score*: 4.0). According to 72.9% of employees, senior researchers strive to build constructive and positive relationships with early-career researchers, which is seen as crucial for professional development.
- Continuing professional development (*the score*: 4.2). A total of 86.4% of respondents feel that IE PAS supports researchers in their scientific development, including their pursuit of higher academic degrees.
- Access to research training and continuous development (*the score*: 4.2). The majority of respondents (89.2%) believe that IE PAS provides opportunities for professional

development and enhances researchers' employment prospects, primarily through creating conditions conducive to developing skills such as participation in training, conferences, internships, and research stays.

- Supervision (*the score*: 4.2). 86.4% of employees appreciate the ability to draw on the good practices, experience, and support of other researchers.

2.5 Analysis of legal acts, including internal regulations, procedures, and key documents in force at IE PAS

<table>
<tr><th colspan="2">ETHICAL AND PROFESSIONAL ASPECTS</th></tr>
<tr><td colspan="2">Analysis regarding the following principles in accordance with the provisions of the European Charter for Researchers and the Code of Conduct for the Recruitment of Researchers:
1. Research freedom
2. Ethical principles
3. Professional responsibility
4. Professional attitude
5. Contractual and legal obligations
6. Accountability
7. Good practice in research
8. Dissemination, exploitation of results
9. Public engagement
10. Non discrimination
11. Evaluation/ appraisal systems</td></tr>
<tr><th>National legal acts</th><th>Regulations and practices in force at IE PAS</th></tr>
<tr><td>➢ Constitution of the Republic of Poland
➢ The Act of July 20, 2018, Law on Higher Education and Science
➢ The Act of April 30, 2010 on the Polish Academy of Sciences
➢ Act of April 30, 2010 on the Principles of Financing Science
➢ Act of February 4, 1994 on Copyright and Related Rights
➢ Act of May 10, 2018 on the protection of personal data
➢ Act of July 27, 2001 on Database Protection
➢ Code of Ethics for Researchers (Annex to Resolution No. 2/2020 of the General Assembly of the Polish Academy of Sciences of June 25, 2020)
➢ Act of December 3, 2010 on the Implementation of Certain Provisions of the European Union regarding Equal Treatment
➢ Code of the National Science Centre on Research Integrity and the Pursuit of</td><td>➢ IE PAS Statute
➢ Work Regulations of IE PAS of November 20, 2015
➢ Resolution of the Scientific Council of IE PAS on March 30, 2023
➢ Resolution No. 11 of December 14, 2023, of the Scientific Council of the Institute of Economics, Polish Academy of Sciences on the establishment of the IE PAS Committee for Ethics in Scientific Research
➢ Regulations on the management of copyright and related rights, industrial property rights and the principles of commercialization of the results of scientific research and development work at IE PAS
➢ Regulations for the implementation of research projects introduced by the Director's order of September 17, 2015
➢ Order No. 1/2020 of the Director of the Institute of Economics Polish Academy of Sciences of January 30, 2020 on the introduction of the rules for applying 50% of the costs of obtaining income from an</td></tr>
</table>

<table>
<tr><td>Research Funding (Resolution No. 39/2016 of the NCN Council)</td><td>employment relationship at the Institute of Economics, Polish Academy of Sciences
➢ Order No. 2/2019 by the Director of IE PAS, dated February 19, 2019, on the introduction of the data protection policy at IE PAS
➢ Gender Equality Plan Introduced by Director’s Order No. 3/2024, dated April 22, 2024
➢ Regulations for the Evaluation of Researchers of the Institute of Economics PAS, amended by Resolution No. 4 of August 31, 2023, of the Scientific Council of IE PAS
➢ Organizational Regulations of IE PAS of September 30, 2021</td></tr>
<tr><td colspan="2">RECRUITMENT AND SELECTION</td></tr>
<tr><td colspan="2">Analysis regarding the following principles in accordance with the provisions of the European Charter for Researchers and the Code of Conduct for the Recruitment of Researchers:
1. Recruitment
2. Recruitment (Code)
3. Selection
4. Transparency
5. Judging merit
6. Variations in the chronological order of CVs
7. Recognition of mobility experience
8. Recognition of qualifications
9. Seniority
10. Postdoctoral appointments</td></tr>
<tr><td>National legal acts</td><td>Regulations and practices in force at IE PAS</td></tr>
<tr><td>➢ The Act of April 30, 2010 on the Polish Academy of Sciences
➢ The Act of July 20, 2018, Law on Higher Education and Science
➢ Labor Code
➢ Regulations on Awarding Funding for Research Tasks Funded by the National Science Centre as regards Research Projects
➢ Regulations on Awarding NCN Scholarships in Research Projects Funded by the National Science Centre of December 1, 2022</td><td>➢ Work Regulations of IE PAS of November 20, 2015
➢ IE PAS Statute
➢ IE PAS remuneration regulations
➢ Regulations on the employment and remuneration of persons participating in the implementation of projects at IE PAS of September 24, 2015
➢ Regulations on the competition procedure for the selection of candidates for academic positions at the Institute of Economics, Polish Academy of Sciences
➢ Order No. 19/2021 of the Director of the Institute of Economics, Polish Academy of Sciences of September 16, 2010, regarding the organization and principles for conducting a research internship at the Institute of Economics Polish Academy of Sciences</td></tr>
</table>

WORKING CONDITIONS AND SAFETY	
Analysis regarding the following principles in accordance with the provisions of the European Charter for Researchers and the Code of Conduct for the Recruitment of Researchers: 1. Recognition of the profession 2. Research environment 3. Working conditions 4. Stability and permanence of employment 5. Funding and salaries 6. Gender balance 7. Career development 8. Value of mobility 9. Access to career advice 10. Intellectual property rights 11. Co-authorship 12. Teaching 13. Complains/appeals 14. Participation in decision-making bodies	
National legal acts	**Regulations and practices in force at IE PAS**
➢ Labor Code ➢ The Act of April 30, 2010 on the Polish Academy of Sciences ➢ Ordinance of the Minister of Science of February 15, 2024, amending the ordinance on the minimum monthly base salary for a professor at a public university ➢ Code of Ethics for Researchers (Annex to Resolution No. 2/2020 of the General Assembly of the Polish Academy of Sciences of June 25, 2020) ➢ Ordinance of the Minister of Labor and Social Policy of January 29, 2013, on entitlements due to an employee employed in a state or local government budgetary unit for business travel ➢ Ordinance of the Minister of Science and Higher Education of February 22, 2019, on the evaluation of the quality of scientific activity ➢ Act of August 27, 2009 on Public Finances ➢ Act of September 11, 2019 - Public Procurement Law	➢ Regulations for the implementation of research projects introduced by the Director's order of September 17, 2015 ➢ Remote work regulations introduced by Order No. 8/2023 of the Director of the Institute of Economics, Polish Academy of Sciences of April 25, 2023 ➢ IE PAS remuneration regulations ➢ Regulations on the employment and remuneration of persons participating in the implementation of projects at IE PAS of September 24, 2015 ➢ Gender Equality Plan Introduced by Director’s Order No. 3/2024, dated April 22, 2024 ➢ Regulations on the management of copyright and related rights, industrial property rights and the principles of commercialization of the results of scientific research and development work at IE PAS ➢ Regulations for the Evaluation of Researchers of the Institute of Economics PAS, amended by Resolution No. 4 of August 31, 2023, of the Scientific Council of IE PAS and approved on October 26, 2023 ➢ Work Regulations of IE PAS of November 20, 2015 ➢ IE PAS Social Benefits Fund ➢ Regulations of the Multisport Program for Employees of the Institute of Economics, Polish Academy of Sciences and their family members

	➢ Regulations on the competition procedure for the selection of candidates for academic positions at the Institute of Economics, Polish Academy of Sciences ➢ Anti-mobbing procedure of June 25, 2015 ➢ Order No. 19/2021 of the Director of the Institute of Economics, Polish Academy of Sciences of September 16, 2010, regarding the organization and principles for conducting a research internship at the Institute of Economics, Polish Academy of Sciences
DEVELOPMENT AND TRAINING	
Analysis regarding the following principles in accordance with the provisions of the European Charter for Researchers and the Code of Conduct for the Recruitment of Researchers: 1. Relation with supervisors 2. Supervision and managerial duties 3. Continuing professional development 4. Access to research training and continuous development 5. Supervision	
National legal acts	**Regulations and practices in force at IE PAS**
➢ Labor Code ➢ Act of July 20, 2018 – Law on Higher Education and Science ➢ Act of December 22, 2015 on the Recognition of Professional Qualifications Acquired in Member States of the European Union ➢ Act of December 22, 2015 on the Integrated Qualifications System ➢ Ordinance of the Minister of Science and Higher Education of September 28, 2018, on the Nostrification of Academic Degrees and Degrees in the Area of Arts Obtained Abroad ➢ Ordinance of the Minister of Science and Higher Education of February 22, 2019, on the evaluation of the quality of scientific activity	➢ Order No. 19/2021 of the Director of the Institute of Economics, Polish Academy of Sciences of September 16, 2010, regarding the organization and principles for conducting a research internship at the Institute of Economics, Polish Academy of Sciences ➢ Proceedings for the the awarding the habilitation degree at the Institute of Economics, Polish Academy of Sciences ➢ Proceedings for the conferment of the doctoral degree ➢ Principles for determining the fee for the Proceedings for the the awarding the habilitation degree at the Institute of Economics, Polish Academy of Sciences ➢ Principles for determining the fee for the proceedings for the conferment of the doctoral degree at the Institute of Economics, Polish Academy of Sciences

3. Strengths and Weaknesses of Practices and Regulations at IE PAS

In identifying the strengths and weaknesses of the applied principles, based on the assessment of practices and regulations in terms of their compliance with the principles of the Charter and the Code, it was noted that there is sometimes a discrepancy between practices and

regulations. It became clear that, although the practices applied at the Institute are in line with the principles of the Charter and the Code, there are either no formal regulations governing these practices, or the existing regulations need to be updated. This applies, for example, to principles related to the recognition of mobility experience, seniority, postdoctoral appointments, career development, mobility, and access to career advice. In the case of such principles, both their strengths and weaknesses are highlighted.

3.1 Strengths

The employee survey and the analysis of existing practices and legal regulations indicate that the following principles should be considered as strengths of the Institute:

(1) Research freedom. Since the establishment of the Institute, the freedom to choose and conduct research has been one of its key operational principles. Researchers have always had, and still have, the autonomy to select their research topics and methodologies. In the annual report, researchers independently declare their research topic for the upcoming year, without the need for supervisor approval. In the task sheets attached to employment contracts, there is no clause that obliges researchers to carry out research projects assigned by a supervisor or other institutions. Currently, researchers independently submit research topics to the Scientific Department. These topics are then presented to the Scientific Council for approval, provided there are no concerns regarding their scientific value. The employees of IE PAS have no doubts about the research freedom provided by the Institute. All responses to the survey question on this topic were positive.

(2) Ethical principles. In this area as well, the survey results indicate that the vast majority (94.6%) of the Institute's employees believe that the recognized practices and ethical principles outlined in the codes of ethics are adhered to. To ensure the implementation of these principles, the Institute established the Committee for Research Ethics on December 14, 2023. Additionally, since June 25, 2020, the Code of Ethics for Researchers has been in effect (accessible through the website), and there is also a Committee for Ethics in Science operating under the Polish Academy of Sciences (PAS). On the IE PAS website, there is a section with the Code of Ethics for Researchers, information on the activities of the Committee for Research Ethics, and a link with details about the PAS Committee for Ethics in Science.

(3) Professional responsibility. The survey responses indicate that over 85% of employees confirm that the research conducted at the Institute is of significance to society and that the principle of intellectual property is respected.

(4) Professional attitude. The majority (83.7%) of surveyed employees confirm that, first, they adhere to this principle while conducting research, and second, when making intended changes to projects and declared research topics, they communicate with the Institute's administration. This obligation is included in the agreements with grant providers and arises from the Project Implementation Regulations, which have been in force at the Institute since September 17, 2015. According to these regulations, it is the responsibility of the employee conducting a project financed from external sources to become familiar with and comply with the rules outlined. At annual meetings with researchers, the criteria for the evaluation of scientific units are presented. Based on these criteria, a nationwide evaluation of scientific units is conducted every four years. To ensure a high evaluation, consistent with the scientific and research potential of the Institute, the management of the Institute sets minimum requirements for scientific achievements that each researcher should meet for the next evaluation periods. To motivate researchers, an annual review is conducted to verify the extent to which these requirements are being met. This is also supported by a system for monitoring researchers' achievements, as outlined in the regulations. This evaluation is carried out by a committee appointed by the Institute's Scientific Council.

(5) Contractual and legal obligations. The survey showed that IE PAS employees are familiar with and respect the generally applicable regulations regarding working conditions and training, the internal regulations of IE PAS, and the requirements specified in grant agreements. Positive responses to questions about these categories of regulations were given by 83.8%, 81.1%, and 89.2% of IE PAS employees, respectively.

(6) Accountability. This principle is followed by the majority of surveyed employees. According to 83.8% of respondents (*the score*: 3.9), the projects are managed in a reliable, efficient, and transparent manner. This is facilitated by the fact that the regulations regarding the expenditure of funds in research projects are stipulated in agreements between the funding institution, the project leader, and the Institute. As a result, these regulations are well known to those managing such projects, which may explain why 16.2% of respondents reported a

lack of knowledge in this area. It can be assumed that these respondents are primarily employees who, for various reasons, do not lead or participate in research projects.

It is important to note that the Project Implementation Regulations were introduced at the Institute on September 17, 2017. Additionally, since January 30, 2020, Directive No. 1/2020 of the Director of IE PAS has been in force, which introduces the rules for applying 50% tax-deductible expenses for employment income at IE PAS. This directive also regulates the recording and storage of research work. According to it, researchers are required to keep records of works covered by copyright or related rights for proper control purposes. Data management plans for research projects, such as those funded by the National Science Centre, are created at the funding application stage. If funding is approved by the sponsoring body, these plans must be followed. Additionally, works carried out as part of statutory activities, as well as those conducted under projects, are collected by the Scientific Department. Similarly, information on the publications of IE PAS researchers is gathered.

(7) Good practice in research. The majority of respondents (91.9%, *the score*: 4.6) have no doubt that the principle of good practice, personal data protection, and information confidentiality is adhered to by INE PAN researchers. This issue is regulated at the national level by the Personal Data Protection Act of May 10, 2018, as well as internally within the Institute. It takes the form of Directive No. 2/2019 issued by the Director on February 19, 2019, which introduced the Personal Data Protection Policy at IE PAS. In addition, administrative staff at the Institute have undergone further training on the application of GDPR regulations.

(8) Dissemination, exploitation of results. In the context of the principle of dissemination and exploitation of research results, a similar level of compliance was noted. According to 89.2% of respondents (*the score*: 4.6), the research results produced by INE PAN researchers are widely disseminated in the form of scientific articles, monographs, and Working Papers. A regular way to fulfil this principle is through the requirement for researchers to annually present their findings at Institute seminars. These seminars are largely public, with a substantial participant list. Moreover, parts of these seminars are recorded and made available on YouTube. The increasing presence of Institute researchers at numerous national and international conferences, as well as their participation in television programs and radio broadcasts, further supports the dissemination of research. Additionally, researchers often popularize their findings through their personal social media

(10) Non discrimination. 91.9% of respondents (*the score*: 4.6) gave a positive response when asked about the level of compliance with this principle. The requirement for its application is legally supported in Poland by the Act of December 3, 2010, on the implementation of certain provisions of European Union law regarding equal treatment. Additionally, actions have been taken at the Institute to counteract discrimination. Through Director's Directive No. 3/2024, issued on April 22, 2024, a Gender Equality Plan was introduced, and a Gender Equality Officer was appointed. Her role is to ensure equal treatment and equal opportunities. The Gender Equality Plan, along with information about the Gender Equality Officer, is available on the IE PAS website.

(11) Evaluation, appraisal system. Survey results indicate that 87.3% of respondents rated the existing researcher appraisal system positively (*the score*: 4.1), particularly regarding its transparency.

(12) Recruitment (Charter). The vast majority of respondents (86.4%) believe that clearly defined standards for hiring researchers are in place at the Institute of Economics, Polish Academy of Sciences (IE PAS), with *the score* of 4.3. This applies particularly to researchers at the early stages of their academic careers. A similar number of respondents (83.7%) confirmed that recruitment at the Institute is conducted through competitive processes, with transparent procedures tailored to the type of position being offered. Among the remaining respondents, 5.4% did not share this belief, and 10.8% reported a lack of knowledge in this area.

(13) Recruitment (Code). Opinions among respondents are divided regarding the comparability of the recruitment principles applied at the Institute with those used in foreign research institutions. Only 45.9% believe that they are comparable.

(14) Selection (Code). The vast majority (83.8%) of respondents feel well-informed about the composition of the Selection Committee and its competencies. In forming the committee, the principle of gender balance is observed, and candidate selection is conducted in accordance with the Competition Procedure Regulations and the stated principles. To ensure an appropriate selection process aligned with the Institute’s staffing needs, the committee includes heads or representatives from all research units as well as researchers at various stages of their academic careers.

(15) Transparency (Code). The survey indicated that only a small portion of respondents (10.8%) believe that job postings lack information about working conditions, the number of available positions, selection criteria, and career development prospects. A similar percentage of respondents reported a lack of knowledge regarding the content of job announcements. Additionally, practices related to informing candidates of the strengths and weaknesses of their applications are implemented at IE PAS.

(16) Judging merit (Code). A significant portion (64.8%) of respondents believe that the Selection Committee evaluates all competencies of candidates applying for positions at IE PAS, both quantitatively and qualitatively. Similar responses were given by respondents regarding the use of additional evaluation criteria beyond bibliometric indicators.

(17) *Variations in the chronological order of CVs*. An analysis of job announcements for research positions at IE PAS shows that they include information about the option to attach additional, non-required documents verifying achievements and competencies, including non-academic ones, which may be relevant to the position for which the candidate is applying. In practice, the Selection Committees consider candidates' non-academic accomplishments. The lack of a formalized OTM-R (Open, Transparent, and Merit-Based Recruitment) policy at IE PAS thus results in 32.4% of respondents being unaware of the evaluation criteria for researchers applying to the Institute.

(18) Recognition of mobility experience (Code). A significant number of respondents (59.4%) believe that mobility experience is valued at IE PAS as a criterion for assessing a candidate's scientific development. Many IE PAS researchers are simultaneously engaged in both national and international research institutions and work within international research teams. This confirms that professional mobility is indeed recognized in candidate evaluations.

(19) Recognition of qualifications. The current practices of the Selection Committee include an evaluation of both formal qualifications, including professional and informal competencies. However, the lack of legal regulations in this area means that 40.5% of respondents are unaware of the Selection Committee's evaluation of professional and informal qualifications. In this case, there is a discrepancy between practice and legal regulations.

(20) Seniority (Code). The vast majority (86.5%) of respondents believe that, in the recruitment process, the level of qualifications for research positions meets the requirements

of these roles at IE PAS. The Competition Procedure Regulations consider the necessary qualifications for each research position at IE PAS.

(21) Postdoctoral appointments. The majority (78.4%) of respondents believe that individuals holding a doctoral degree are encouraged to pursue further academic degrees and titles. Only 16.2% of respondents reported a lack of knowledge on this topic.

(22) Recognition of the profession. Almost all respondents (95%, *the score*: 4.6) believe that this principle is fully implemented. Its application is reflected in the task sheet attached to employment contracts, which outlines employee responsibilities and appropriately differentiates them according to the position held, categorized as research, research-technical, or administrative roles. Additionally, under the Director's decree introduced on September 17, 2015, the Institute has implemented the Regulations for the Implementation of Research Projects. This document provides information on the scope of administrative support available to researchers during both the application and execution phases of research projects.

(23) Research environment. The vast majority (83.7%) of respondents believe that IE PAS, within its capabilities, strives to provide a stimulating scientific environment. This includes ensuring access to appropriate equipment, remote scientific databases, journal and data subscriptions, software licenses, and the option for remote work. This particularly involves transitioning to a hybrid seminar format, which not only facilitates researchers' participation in institute seminars but also saves time and eliminates commuting costs for those residing outside of Warsaw.

(24) Working conditions. All respondents indicated that IE PAS provides researchers with flexible working conditions. The Institute operates under a continuously updated Remote Work Policy introduced by the Director's Order on April 25, 2023, which ensures flexible working conditions for researchers. This arrangement also enables researchers to balance their professional and family lives.

(25) Stability and permanence of employment. According to 94.6% of respondents, IE PAS provides researchers with employment stability. Institute employees are employed under a work contract regulated by the Labor Code and the Act on the Polish Academy of Sciences. Employment-related regulations at IE PAS are available on the intranet.

(26) Funding and salaries. The majority (86.5%) of respondents believe that IE PAS provides researchers with fair compensation conditions, including social security benefits. Only about 10.8% of respondents expressed no opinion on this matter, and no one questioned the Institute's compensation terms. These terms are based on statutory regulations, including the continuously updated internal Remuneration Regulations and the Employment and Remuneration Policy for Project Participants, effective since September 24, 2015. The baseline for setting the researchers' pay scale is the minimum wage level determined by the Minister of Science and Higher Education, which serves as a reference point for setting minimum remuneration levels for assistants, assistant professors, and professors by decree. The potential to earn above-minimum wages depends on grant funding and the individual publication activity of each researcher.

(27) Gender balance. The majority (86.5%) of respondents believe that the Institute strives to ensure balance across all employee groups.

(29) Value of mobility. A significant portion of respondents (72.9%) believe that this principle is sufficiently implemented at the Institute. Several measures support this. First, the establishment of a support fund for research departments, which can finance activities such as conference attendance (both domestic and international), internships, and research visits. Second, permission for additional employment outside the Institute in other academic institutions (including international ones), public institutions, and consulting or advisory organizations. Third, the incorporation of mobility as a criterion in the periodic evaluation system for researchers.

(30) Access to career advice. A significant portion (64.8%) of IE PAS respondents recognize the support in career counselling they receive from the Institute's management. The IE PAS Directorate provides recommendations regarding expected actions from researchers on various occasions (e.g., at the start of the evaluation period, during periodic reviews, etc.).

(31) Intellectual property rights. According to a significant majority of respondents (72.9%), the Institute has properly implemented this principle. The protection of intellectual property rights, especially in conducting and publishing research results, is supported by the Institute’s Regulations on the Management of Copyright and Related Rights, Industrial Property Rights, and the Principles for Commercializing Research and Development Outcomes.

(32) Co-authorship. The survey revealed that a clear majority of IE PAS respondents (nearly 68%) agree that the Institute's procedures provide researchers with the opportunity to exercise their right to recognition of the actual contributions of co-authors or the right to publish their research findings independently of their supervisors.

(34) Complains/appeals. Procedures for handling complaints, appeals, and conflict resolution are implemented at the Institute. In 2023, a disciplinary officer was appointed. An Anti-Mobbing Procedure has been in place since June 25, 2015, and, following a survey, a Gender Equality Officer was appointed in April 2024. The implemented procedures ensure impartiality in handling complaints and provide informal support in conflict resolution (*the score* of 3.9).

(35) Participation in decision-making bodies. A significant majority (81.1%) of respondents believe that researchers have representatives in the informational, consultative, and decision-making bodies at IE PAS. In contrast, 16.2% of respondents indicated a lack of knowledge in this area. Researchers at various stages of their academic careers have representatives on the IE PAS Scientific Council (in accordance with the Council's Regulations) and in various committees established to address key issues related to the functioning of IE PAS, particularly in recruitment and periodic evaluation. Information on the progress and outcomes of each committee’s work is included in the annual IE PAS scientific activity reports and is communicated to employees via the intranet.

(36) Relation with supervisors. According to 82.7% of Institute respondents, experienced researchers are actively involved in the academic development of early-career researchers. The relationships between them include jointly setting research agendas and supervisors monitoring the progress and results of these projects. The relatively small number of researchers at the Institute fosters frequent, direct interactions with more experienced colleagues, facilitating knowledge transfer and the building of stronger academic bonds. These relationships are based on mentoring and advisory roles, through which knowledge transfer occurs, and collaborative research projects are often initiated.

(37) Supervision and managerial duties. A clear majority (72.9%) of respondents believe that IE PAS researchers foster constructive and positive relationships with early-career researchers. The latter have the opportunity to participate in grant projects led by experienced researchers and benefit from their knowledge in research management (including project-based research). Presenting their research findings at the Institute’s

scientific seminars helps them develop valuable presentation skills and receive valuable feedback.

(38) Continuing professional development. The vast majority (86.4%) of respondents recognize and appreciate the Institute's support in pursuing further academic degrees. Only 8.1% of employees indicated a lack of such support.

(39) Access to research training and continuous development. The majority (89.2%) of employees believe that IE PAS provides researchers with opportunities for professional development and enhances their future employability. This is achieved primarily through access to resources that enable continuous skill development, such as participation in training, conferences, internships, and research stays.

(40) Supervision. According to 86.4% of respondents, early-career researchers at IE PAS have the opportunity to benefit from best practices, experiences, and support from other researchers.

3.2 Weaknesses

(2) Ethical principles. Although, as previously mentioned, the majority of respondents expressed a positive opinion regarding the application of ethical principles at the Institute, the Committee for Ethics in Scientific Research, established by the Scientific Council on December 14, 2023, has yet to formalize and present its operating principles.

(3) Professional responsibility. The survey results also indicated a generally positive assessment by respondents regarding researchers' adherence to the principles of professional responsibility at the Institute. However, certain internal documents need to be updated and widely disseminated. This is particularly true for the Regulations on the Management of Copyright and Related Rights, Industrial Property Rights, and the Principles of Commercializing Research and Development Outcomes at the Institute, which have been in effect since June 18, 2015.

(4) Professional attitude. On one hand, regarding adherence to this principle in the implementation of research projects, the overall assessment by employees is positive. However, on the other hand, a significant shortcoming at the Institute is the noticeable lack of awareness—felt by over 25% of employees—of the Institute's mission and strategic

objectives. These are, in fact, presented in the Institute's annual scientific activity reports. This suggests a need to consolidate them into a separate document and publish them on the main website, along with information on the principles of research unit evaluation and the periodic assessment of researchers. There is also a need to clarify, in the IE PAS Project Implementation Regulations, the procedures by which researchers confirm their knowledge of the Institute's policies governing this area of activity.

(5) Contractual and legal obligations. Although they are generally known and respected by respondents, these regulations are not universally accessible. Employees have limited access to current regulations governing working conditions, internal IE PAS policies, and those arising from grant agreements. Furthermore, despite the existence of good practices, respondents are sometimes unaware of certain regulations. As a result, over 10% of respondents indicate insufficient knowledge regarding national legislation, internal Institute policies, training organization, and availability. The mission and strategic objectives of the Institute have not been consolidated into a separate document.

(6) Accountability. As many as 40% of employees believe that research results are not collected on an ongoing basis. This points to difficulties in accessing information regarding the principles for collecting, backing up, and storing research results, including those from research projects conducted at IE PAS. Addressing this issue requires not only providing information on data management principles in the intranet and in the Institute's regulations concerning research projects but also appointing a Data Management Officer.

(9) Public engagement. The fact that as many as 40% of respondents (of *the score*: 3.7) believe that research results are either insufficiently understandable for those outside the field or that there is limited opportunity for effective communication with scientists highlights the need to find ways to present research in a non-technical manner.

(11) Evaluation, appraisal system. More detailed questions about the researcher evaluation system revealed its weaknesses and its misalignment with the principles of the European Charter for Researchers. This necessitates a refinement and adjustment of the current Employee Evaluation Regulations—enforced by the decision of the IE PAS Scientific Council and approved by the Vice President of PAS—to meet the requirements of the European Charter for Researchers.

(12) Recruitment. Although the recruitment principles for research positions at IE PAS are regulated by the 2011 Competition Procedure Regulations for selecting candidates for research positions, this document does not include standards relevant to recruitment practices in international research institutions. This necessitates the development and dissemination of an additional document, the OTM-R Policy, to complement these Regulations.

(13) Recruitment (Code). The absence of provisions in the current Competition Procedure Regulations regarding recruitment standards in international research institutions may explain why as many as 45.9% of respondents believe that the recruitment principles outlined in these Regulations are not comparable to those in foreign research institutions.

(14) Selection (Code). Among respondents, there is a predominance of positive opinions regarding the use of good practices in the selection of candidates for research positions. However, there is a felt need to specify the operational guidelines of the Selection Committees in more detail and to define, within the OTM-R policy, the Committees' authority regarding the selection of evaluation criteria for specific research positions.

(15) Transparency (Code). 45.9% of respondents do not know whether candidates are informed of their strengths and weaknesses, while 18.9% believe that candidates are not informed on this matter. An analysis of previous job postings by the Institute revealed that information regarding the number of job openings and candidates' career development prospects was not provided.

(16) Judging merit (Code). Nearly one-third of respondents (32.4%) are unaware of the process by which the Selection Committee evaluates candidates applying for positions at IE PAS. A similar percentage of responses was recorded in relation to the question about the use of evaluation criteria beyond bibliometric indicators. The Competition Procedure Regulations do not specify additional, non-academic evaluation criteria that align with the Institute's development goals. This highlights the need to include, within the OTM-R Policy, non-academic achievements and principles for assessing professional qualifications that would be considered in candidate evaluations.

(17) Variations in the chronological order of CVs. One-third of respondents (32.4%) are unaware of the option to attach documents verifying achievements and competencies,

including non-academic accomplishments, to their application. This indicates gaps in the regulations concerning competition procedures.

(18) Recognition of mobility experience (Code). A significant portion of employees (35.1%) do not know whether professional mobility is used as an evaluation criterion for candidates applying for positions at IE PAS. This stems from the lack of detailed mobility criteria for candidates in the regulations concerning competition procedures.

(19) Recognition of qualifications. The Selection Committee evaluates the professional and informal qualifications of candidates for research positions at IE PAS. However, a large portion (over 40%) of respondents are unaware of the existence of such an evaluation. This is due to the absence of guidelines for assessing professional and informal qualifications in the regulations concerning competition procedures.

(20) Seniority (Code). 86.5% of employees believe that, in the recruitment process, the level of qualifications for research positions meets the requirements of these roles at IE PAS. However, job announcements for all research positions (R1-R4) lack detailed recruitment procedures. The Institute has not developed comprehensive recruitment procedures or templates for job postings across all competitive positions. Additionally, there is a lack of job descriptions that would be useful in the recruitment process (including job offer formulation, candidate evaluation, feedback on candidates' strengths and weaknesses, and information on working conditions and career development at the Institute).

(21) Postdoctoral appointments. As many as 78.4% of employees believe that individuals holding a doctoral degree are encouraged to pursue further academic qualifications and titles. However, the Institute lacks a document outlining career development pathways for researchers at all career stages, as well as recommendations for postdoctoral researchers. This shortcoming indicates the need to establish appropriate regulations within the Institute.

(28) Career development. The majority of employees (62.1%) have doubts as to whether the Institute has a career development strategy for researchers. The Institute lacks a unified document outlining career development pathways for researchers at various stages of their academic careers.

(29) Value of mobility. The Employee Evaluation Regulations of the Institute do not include a section on the mobility of researchers. The Regulations also lack information on the evaluation criteria for researchers as outlined in the European Charter for Researchers.

(30) Access to career advice. Some respondents (24.3%) have doubts regarding the level of support provided by the Institute in planning researchers' career development paths. Additionally, 10.8% of respondents indicate a lack of such support. There is a need to develop and implement descriptions of career development pathways for researchers at all stages of their careers.

(31) Intellectual property rights. A significant proportion (24.3%) of respondents have doubts about whether the legal protections outlined in the mentioned regulations enable researchers to benefit from conducting and publishing research findings. The Institute's Regulations on the Management of Copyright and Related Rights, Industrial Property Rights, and the Principles for Commercializing Research and Development Outcomes ensure intellectual property protection. However, these regulations are not sufficiently known among employees. Additionally, as this document has been in effect since 2015, it requires updating. This suggests the need for both updating and promoting these documents.

(32) Co-authorship. A significant proportion (29.7%) of employees report a lack of knowledge about the existence of procedures at the Institute that ensure researchers have the right to recognition of their actual contributions as co-authors or the right to publish their research findings independently of their supervisors. This highlights the need to develop appropriate regulations and effectively inform employees of their implementation.

(33) Teaching. Even though researchers at the Institute are not required to engage in teaching activities, there is a need to recognize teaching as part of professional development and to include it in the evaluation of researchers' performance. IE PAS employees have doubts about whether teaching is seen as a valuable opportunity for researchers' professional growth at the Institute.

(34) Complains/appeals. Employees have doubts about the existence of procedures at the Institute that ensure impartiality in handling complaints and provide confidential, informal support for conflict resolution. This is evidenced by the high percentage (29.7%) of respondents who report a lack of knowledge in this area. This suggests that employees are

not sufficiently informed about these procedures and do not have easy access to the relevant internal documents. There is a need to make these regulations available on the intranet.

(36) Relation with supervisors. Despite a high percentage of positive responses from employees and the use of good practices, the Institute lacks appropriate regulations, particularly regarding the manner in which supervisors provide support to early-career researchers.

(37) Supervision and managerial duties. The percentage of positive responses from employees regarding relationships between early-career and experienced researchers, as well as the application of good practices at the Institute, is high. However, the Institute lacks formal regulations concerning the support provided to early-career researchers by experienced researchers.

(38) Continuing professional development. A small percentage (8.1%) of respondents indicate that the Institute does not support researchers in obtaining further academic degrees. However, the Institute does not have a document that outlines career development pathways for researchers at all stages of their careers.

(39) Access to research training and continuous development. Despite a high percentage of positive responses from employees regarding their access to training, the Institute lacks consistent access to training opportunities tailored to different stages of career development. A significant limitation is the relatively small budget allocated for conferences and training offered by the Institute from its own funds as part of the support fund for research departments.

(40) Supervision. 16.2% of respondents have doubts about whether early-career researchers at IE PAS have the opportunity to benefit from best practices, experiences, and support from other researchers. The lack of formal regulations at the Institute regarding support for junior researchers from their supervisors is one of the reasons for these doubts.

4. Action Plan

After analyzing legal regulations and survey results, identifying gaps and conducting a detailed analysis, strengths and weaknesses of current practices and applicable regulations were assessed in relation to the principles specified in the Code and Charter. Areas were identified where there is a need to improve processes. Sixteen main actions, comprising 49 sub-actions, have been outlined for implementation at IE PAS.

The table below presents the planned actions, specifies their implementation timelines, identifies the units responsible for execution, and provides performance indicators.

	GAP Principle(s)	Timing (at least by year's quarter/semester)	Responsible Unit	Indicators (I)/ Target(s) (T)
ACTION 1 Development and dissemination of the operating principles for the IE PAS Committee for Ethics in Scientific Research, established by the IE PAS Scientific Council on December 14, 2023.	2. Ethical principles	Q3 2025	Scientific Council of IE PAS	**I**: 1. The Regulations of the Committee for Ethics in Scientific Research approved by the Scientific Council 2. The section on Research Ethics created on the website, including the Regulations of the Committee for Ethics in Scientific Research **T**: Employees are familiar with the scope and principles of the Committee's for Ethics in Scientific Research activities
Action 1.1 Development and dissemination of a research description application form template.	2. Ethical principles	Q3 2025	Committee for Ethics in Scientific Research	**I**: 1. The template for the Request for Opinion from the Committee for Ethics in Scientific Research

				2. The template for the Request for Opinion from the Committee for Ethics in Scientific Research is available on the website in the Research Ethics section **T**: Facilitating employees' access to obtaining opinions from the Committee for Ethics in Scientific Research
Action 1.2 Development and dissemination of a participant consent form template for research participation	2. Ethical principles	Q3 2025	Committee for Ethics in Scientific Research	**I**: 1. The template for the participant consent form for participation in research 2. The template for the participant consent form for participation in research is available on the IE PAS website in the Research Ethics section **T**: Facilitating employees' access to obtaining opinions from the Committee for Ethics in Scientific Research
Action 1.3 Dissemination of a consent form for data processing, including an information clause	2. Ethical principles	Q3 2025	Committee for Ethics in Scientific Research	**I**: The personal data processing consent form, along with the information clause, is available on the IE PAS website in the Research Ethics section **T**: Facilitating employees' access to the personal data processing consent form, along with the information clause
Action 1.4 Development and dissemination of an information template for research participants	2. Ethical principles	Q3 2025	Committee for Ethics in Scientific Research	**I**: 1. The template for information for research participants established by the Committee for Ethics in Scientific Research

				2. The template for information for research participants is available on the IE PAS website in the Research Ethics section **T**: Streamlining the process for employees to prepare information for research participants subject to review by the Committee for Ethics in Scientific Research and thereby accelerating the opinion issuance procedure
ACTION 2 Updating and disseminating the Regulations on the management of copyright and related rights, industrial property rights and the principles of commercialization of the results of scientific research and development work at IE PAS	3. Professional responsibility 31. Intellectual Property Rights	Q4 2025	Scientific Council of IE PAS	**I**: 1. Amendments to the Regulations on the management of copyright and related rights, industrial property rights, and the principles of commercialization of the results of scientific research and development work approved by the Scientific Council 2. The Regulations on the management of copyright and related rights, industrial property rights, and the principles of commercialization of the results of scientific research and development work are available on the IE PAS website **T**: Employees have continuous access to the current regulations on the management of copyright and related rights, industrial

				property rights, and the principles of commercialization of the results of scientific research and development work T: Employees are familiar with the current regulations on the management of copyright and related rights, industrial property rights, and the principles of commercialization of the results of scientific research and development work
ACTION 3 Place the mission and strategic goals of IE PAS on the main page of the Institute's website.	4. Professional attitude	Q1 2025	Director	**I**: The mission and strategic goals of IE PAS are posted on the website **T**: Employees are aware of the mission and strategic goals of IE PAS
ACTION 4 Clarify in the Regulations for the implementation of research projects at IE PAS the procedures for confirming researchers knowledge of the regulations applicable to this area of the Institute's activities.	4. Professional attitude	Q4 2025	Director	**I**: 1. Changes introduced by the Director's order to the Regulations for the implementation of research projects at IE PAS concerning the procedures for confirming that research staff are familiar with the regulations governing this area of the Institute's activities 2. The updated Regulations for the implementation of research projects at IE PAS are posted on the intranet **T**: Employees, in accordance with the regulations, confirm their familiarity with the

				procedures for implementing projects at IE PAS
ACTION 5 Develop and disseminate to employees information outlining the principles of evaluating scientific units and the principles of periodic evaluation of researchers	4. Professional attitude 11. Evaluation/ appraisal systems 33. Teaching	Q4 2025	Scientific Department	**I**: 1. Information for employees containing the principles of evaluation for research units and the principles of periodic assessment of research staff 2. Information for employees containing the principles of evaluation for research units and the principles of periodic assessment of research staff is posted on the intranet 3. The current Regulation of the Ministry of Science and Higher Education on the evaluation of the quality of scientific activity is posted on the intranet **T**: Employees are familiar with the principles of evaluation for research units and the principles of periodic assessment of research staff
ACTION 6 Develop information for employees that includes working conditions and training, IE PAS's internal regulations, and requirements specified in grant agreements	5. Contractual and legal obligations	Q2 2025	Department of Human Resources and General Affairs, Scientific Department	**I**: Information for employees containing working conditions and training, internal regulations of IE PAS, and requirements specified in agreements with grant providers, including references to internal and external legal regulations **T**: Employees are familiar with the regulations governing working conditions, the internal regulations of IE PAS, and

				those resulting from agreements with grant providers
Action 6.1 Place information on the intranet regarding working conditions and training, IE PAS's internal regulations, and requirements outlined in grant agreements	5. Contractual and legal obligations	Q2 2025 r.	Department of Human Resources and General Affairs, Scientific Department	**I**: Working conditions and training, internal regulations of IE PAS, and requirements specified in agreements with grant providers are posted on the intranet **T**: Facilitating employees' access to regulations governing working conditions, internal regulations of IE PAS, and those resulting from agreements with grant providers, which will enhance their knowledge in this area
Action 6.2 Provide ongoing notifications via email to researchers about training organized by research funding bodies related to the implementation and settlement of research projects	5. Contractual and legal obligations	Continuous action	Department of Human Resources and General Affairs, Scientific Department	**I**: The number of emails sent to research staff informing them about training organized by research funding agencies regarding the implementation and accounting of research projects **T**: Facilitating employees' access to training organized by research funding agencies concerning the implementation and accounting of research projects
ACTION 7 Clarifying the principles regarding the collection, backup, and storage of research results by researchers at IE PAS	6. Accountability	Q2 2026	Director	**I**: The regulations concerning the collection, backup creation, and storage of research results by research staff at IE PAS

				introduced by the Director's decree **T**: Employees are familiar with and apply the principles regarding the collection, backup creation, and storage of research results at IE PAS as described in the regulations in their day-to-day work
Action 7.1 Implementing a dedicated cloud service (password-protected) for a long-term storage of data and research results.	6. Accountability	Q2 2026	Administration Department	**I**: The dedicated cloud for long-term storage of data and research results is operational, and access is provided to all research staff at IE PAS **T**: Research results are continuously collected and stored by employees in the dedicated cloud, and are available in the case of any potential failures or audits
Action 7.2 Publication of the principles regarding the collection, backup, and storage of research results by researchers at IE PAS on the intranet	6. Accountability	Q2 2026	Administration Department	**I**: The principles regarding the collection, backup creation, and storage of research results by research staff at IE PAS are posted on the intranet **T**: Employees have ongoing access to the principles regarding the collection, backup creation, and storage of research results by research staff at IE PAS
ACTION 8 To describe the principles for managing research data in projects conducted at the Institute in the Regulations for the implementation of research projects at IE PAS	6. Accountability	Q4 2025	Director	**I**: The update to the Regulations for the Implementation of Research Projects at IE PAS regarding the principles for managing

				research data in research projects conducted at the Institute has been implemented by the Director's decree **T**: Data management plans for grant applications are developed by employees based on the regulations in effect at IE PAS
Action 8.1 To appoint a Research Data Management Officer for projects conducted at the Institute	6. Accountability	Q4 2025	Director	**I**: The data management officer for research projects conducted at the Institute has been appointed by the Director **T**: Employees have support from a competent individual in developing data management plans for grant applications
Action 8.2 To post information on the intranet regarding the principles of managing research data in research projects conducted at IE PAS	6. Accountability	Q4 2025	Director	I: Information regarding the principles of managing research data in research projects conducted at IE PAS is posted on the intranet T: Employees have continuous access to the principles of managing research data in research projects conducted at IE PAS
ACTION 9 To develop guidelines for communicating research results in a non-technical manner	9. Public engagement	Q2 2025	Scientific Department	**I**: Information on the principles of communicating research results in a non-technical way, prepared in the form of a presentation **T**: Employees know and apply the principles of

				communicating research results in a non-technical way
Action 9.1 To inform employees about the social media channels used by the Institute and to encourage them to participate in creating a network to reach a broader audience	9. Public engagement	Q2 2025	Scientific Department	**I:** The institute's profile, together with the profiles of employees on social media, creating a network through which research results are communicated. **T:** Ensuring better access to research results by employees for people following the institute's profile.
Action 9.2 To provide employees with training on scientific communication and media collaboration	9. Public engagement	Q2 2025	Department of Human Resources and General Affairs, Administration Department	**I:** Training in scientific communication and cooperation with the media offered to employees of IE PAS. **T:** Employees know and apply the principles of scientific communication and cooperation with the media.
ACTION 10 Detailing and aligning the evaluation criteria for researchers with the requirements of the European Charter for Researchers as outlined in the Regulations for the Evaluation of Researchers of the Institute of Economics PAS	11. Evaluation/ appraisal systems , 29. Value of mobility, 33. Teaching,	Q4 2025	Scientific Council of IE PAS	**I:** The criteria for evaluating researchers contained in the Regulations for the Evaluation of Scientific Employees of the Institute of Economics PAS are adapted to the requirements of the European Charter for Researchers. **T:** Employees are evaluated in a transparent manner that takes into account the requirements of the European Charter for Researchers.

Action 10.1 Including mobility in the Regulations for the Evaluation of Researchers of the Institute of Economics PAS	29. Value of mobility	Q4 2025	Scientific Council of IE PAS, Vice President of the Polish Academy of Science	**I**: 1.The changes adopted by the Scientific Council in the Regulations for the Evaluation of Scientific Employees of the Institute of Economics PAS regarding the addition of mobility criteria. 2. The Regulations for the Evaluation of Scientific Employees of the Institute of Economics PAS are approved by the Vice President of the Polish Academy of Sciences. **T**: The value of mobility (e.g., geographical, intersectoral, interdisciplinary, virtual) for scientific development is appreciated in the IE PAS.
Action 10.2 Including teaching in the Regulations for the Evaluation of Researchers of the Institute of Economics PAS	33. Teaching	Q4 2025	Scientific Council of IE PAS, Vice President of the Polish Academy of Science	**I**: 1.The changes adopted by the Scientific Council in the Regulations for the Evaluation of Scientific Employees of the Institute of Economics PAS regarding the addition of teaching criteria. 2. The Regulations for the Evaluation of Scientific Employees of the Institute of Economics PAS are approved by the Vice President of the Polish Academy of Sciences. **T**: Teaching at IE PAS is treated as a valuable opportunity for the

				professional development of researchers.
Action 10.3 Informing employees about the forms of mobility support offered by IE PAS during staff meetings	29. Value of mobility	Q4 2025	Director	**I:** The agenda for the meeting with employees includes information about support for scientific activities, including mobility. **T:** Increasing employees' knowledge about mobility support initiatives offered by IE PAS.
Action 10.4 Posting links to current Polish National Agency for Academic Exchange (NAWA) offers and Office of International Cooperation PAS offers, which are usually received by the Scientific Department and any other entities supporting researchers mobility on the intranet	29. Value of mobility	Continuous action	Scientific Department	**I:** A section dedicated to mobility created on the intranet. **T:** Employees have continuous access to mobility support opportunities.
Action 10.5 Publishing the new Regulations for the Evaluation of Researchers of the Institute of Economics PAS on the IE PAS intranet	11. Evaluation/ appraisal systems 29. Value of mobility 33. Teaching	Q4 2025	Scientific Department	**I:** The Regulations for the Evaluation of Scientific Employees of the Institute of Economics, Polish Academy of Sciences are posted on the IE PAS intranet. **T:** Ensuring employees have access to the Regulations for the Evaluation of Scientific Employees of the Institute of Economics, Polish Academy of Sciences.
Action 10.6 Organizing a meeting with employees to present changes in the evaluation criteria	11. Evaluation/ appraisal systems 29. Value of mobility 33. Teaching	Q4 2025	Director	**I:** The Regulations for the Evaluation of Scientific Employees of the Institute of Economics, Polish Academy of Sciences are discussed during the meeting with employees. **T:** Employees know the

				criteria for the evaluation of scientific employees of the Institute of Economics, Polish Academy of Sciences.
ACTION 11 Development and dissemination of information for employees containing a selection of issues from the Code of Ethics for Researchers introduced by Resolution No. 2/2020 of the General Assembly of the Polish Academy of Sciences of June 25, 2020	32. Co-authorship	Q4 IV 2025	Scientific Department	**I**: 1. Information for employees containing a selection of issues derived from the Code of Ethics for Researchers developed and implemented by the Polish Academy of Sciences. 2. Information for employees containing a selection of issues derived from the Code of Ethics for Researchers developed and implemented by the Polish Academy of Sciences is posted on the intranet. **T:** Employees are familiar with the issues arising from the Code of Ethics for Researchers developed and implemented by the Polish Academy of Sciences, including, in particular, the procedures ensuring researchers' rights to recognition of the actual contributions of co-authors and the right to publish their research results independently of their supervisors.

ACTION 12 Updating and disseminating procedures ensuring impartiality in handling complaints and confidential, informal conflict resolution	34. Complains/ appeals	Q2 2026	Department of Human Resources and General Affairs	**I:** The updated procedure ensuring impartiality in handling complaints and providing confidential and informal assistance in resolving conflicts. **I:** The updated procedure ensuring impartiality in handling complaints and providing confidential and informal assistance in resolving conflicts is posted on the intranet. **T:** Employees are aware of the procedure ensuring impartiality in handling complaints and providing confidential and informal assistance in resolving conflicts.
Action 12.1 Developing a document that clearly explains to employees the procedures ensuring impartiality in handling complaints and providing confidential, informal conflict resolution assistance	34. Complains/ appeals	Q2 2026	Department of Human Resources and General Affairs	**I:** A document explaining to employees in an accessible way the procedures ensuring impartiality in handling complaints and providing confidential and informal assistance in resolving conflicts, developed in the form of a presentation. **T:** Employees are familiar with the procedures ensuring impartiality in handling complaints and providing confidential and informal assistance in resolving conflicts.

Action 12.2 Posting information about procedures ensuring impartiality in handling complaints and providing confidential, informal conflict resolution assistance on the intranet	34. Complains/ appeals	Q2 2026	Department of Human Resources and General Affairs	**I:** A document explaining to employees in a transparent manner the procedures ensuring impartiality in handling complaints and providing confidential and informal assistance in resolving conflicts is posted on the IE PAS website. **T:** Employees have continuous access to information about the procedures ensuring impartiality in handling complaints and providing confidential and informal assistance in resolving conflicts applicable at IE PAS.
ACTION 13 Development and implementation of the "Open, Transparent, and Merit-based Recruitment Policy" (OTM-R Policy)	12. Recruitment 13 Recruitment (Code) 14. Selection (Code) 15. Transparency (Code) 16. Judging merit (Code) 17. Variations in the chronological order of CVs. 18. Recognition of mobility experience 19. Recognition of qualifications (Code)	Q2 2026	Director	**I:** The Open, Transparent, and Merit-based Recruitment Policy (OTM-R Policy) introduced by the Director's decree. **T:** Open, transparent, and merit-based recruitment principles for scientific employees are in accordance with the European Charter for Researchers and the Code of Conduct for the Recruitment of Researchers.

Action 13.1 Publishing the OTM-R Policy in both Polish and English on the IE PAS website	12. Recruitment	Q2 2026	Director	**I:** The Open, Transparent, and Merit-based Recruitment Policy (OTM-R) is posted online in both Polish and English. **T:** Ensuring accessibility to the OTM-R Policy for all interested parties, including those who use English.
Action 13.2 Organizing a meeting with employees to present the OTM-R Policy	12. Recruitment	Q2 2026	Director	**I:** Presentation of the Open, Transparent, and Merit-based Recruitment Policy at a meeting with employees. **T:** Informing employees about the recruitment principles outlined in the OTM-R Policy.
Action 13.3 Defining the principles for applying international standards in the recruitment process in the OTM-R Policy	13 Recruitment (Code)	Q1 2026	Director	**I:** The OTM-R Policy incorporating principles related to the application of international standards in the recruitment process. **T:** Ensuring international standards are applied in the recruitment process.
Action 13.4 Defining the principles for the establishment and operation of competition committees in the OTM-R Policy	14. Selection (Code)	Q1 2026	Director	**I:** The OTM-R Policy incorporating principles for the appointment of competition committees. **T:** Making the principles for the appointment and operation of competition committees in accordance with the European Charter for Researchers and the Code of Conduct for the Recruitment of Researchers.

Action 13.5 Specifying powers of competition committees regarding the selection criteria for evaluating candidates for various research positions in the OTM-R Policy	14. Selection (Code) 16. Judging merit (Code)	Q1 2026	Director	**I:** The OTM-R Policy defining the powers of competition committees regarding the selection criteria for evaluating candidates for specific research positions. **T:** Ensuring that the competition committee evaluates all competencies in both quantitative and qualitative terms. **T:** The criteria for evaluating candidates for specific research positions are in accordance with the European Charter for Researchers and the Code of Conduct for the Recruitment of Researchers.
Action 13.6 Define in the OTM-R Policy the standards for preparing job announcements that include information on working conditions, salary levels in accordance with the applicable Regulation of the Ministry of Science and Higher Education on the minimum monthly salary, and the IE PAS remuneration regulations	15. (Transparency (Code)	Q1 2026	Director	**I:** The OTM-R Policy defining the standards for creating job announcements that include information about working conditions and salary in accordance with the current Regulation of the Minister of Science on the minimum monthly base salary and the IE PAS remuneration regulations. **T:** Job announcements include information about working conditions in accordance with the European Charter for Researchers and the Code of Conduct for the Recruitment of Researchers.
Action 13.7 Specify the prospects for professional development in the OTM-R Policy	15. (Transparency (Code)	Q1 2026	Director	**I:** The OTM-R Policy defining career development prospects. **T:** Recruitment announcements include

				information about career development prospects.
Action 13.8 Outlining the principles for informing candidates about the strengths and weaknesses of their applications in the OTM-R Policy	15. (Transparency (Code)	Q1 2026	Director	**I:** The OTM-R Policy defining the principles for notifying candidates about the strengths and weaknesses of their applications. **T:** After the recruitment process is completed, candidates are informed about the strengths and weaknesses of their applications.
Action 13.9 Defining the principles for including non-scientific achievements in job announcements and during the evaluation of candidates in the OTM-R Policy	16. Judging merit (Code) 17. Variations in the chronological order of CVs 18. Recognition of qualifications (Code)	Q1 2026	Director	**I:** The OTM-R Policy defining the principles for considering non-scientific achievements in job announcements and during candidate evaluation. **T:** Non-scientific achievements are taken into account in job announcements and during the evaluation of candidates.
Action 13.10 Specifying criteria for assessing candidates' mobility in the OTM-R Policy	18. Recognition of mobility experience	Q1 2026	Director	**I:** The OTM-R Policy incorporating criteria for evaluating candidates' mobility. **T:** Achievements related to mobility are considered in job announcements and during the evaluation of candidates.
Action 13.11 Defining the principles for assessing professional qualifications, including informal ones in the OTM-R Policy	16. Judging merit (Code) 17. Variations in the chronological order of CVs 19. Recognition of qualifications (Code)	Q1 2026	Director	**I:** The OTM-R Policy including principles for evaluating professional qualifications, including informal ones. **T:** Informal qualifications are considered during the evaluation of candidates.
ACTION 14 Development of procedures and instructions	12. Recruitment 20. Seniority	Q4 2026	OTM-R Implementation Committee	**I:** Procedures and instructions related to implementing the

related to the implementation of the OTM-R Policy	(Code) 21. Postdoctoral appointments (Code)			OTM-R Policy. **T:** Clear and uniform procedures and forms are available to all participants in the recruitment process.
Action 14.1 Development of recruitment procedures and templates for job announcements for all positions (R1-R4)	12. Recruitment 20. Seniority (Code) 21. Postdoctoral appointments (Code)	Q4 2026	OTM-R Implementation Committee	**I:** Recruitment procedures and templates for job announcements for all positions (R1-R4). **T:** Clear and uniform procedures and forms are applied to all participants in the recruitment process.
Action 14.2 Enhancing job descriptions to be used in the recruitment process (specifying job offers, candidate assessment, feedback for candidates on their strengths and weaknesses, and work conditions and career development at the Institute)	12. Recruitment 20. Seniority (Code) 21. Postdoctoral appointments (Code)	Q4 2026	OTM-R Implementation Committee	**I:** Job descriptions updated to enhance their usefulness in the recruitment process (including job offer formulation, candidate evaluation, feedback to candidates on their strengths and weaknesses, and information on working conditions and career development at the Institute). **T:** Clear and uniform procedures and forms are applied to all participants in the recruitment process.

Action 14.3 Informing Institute employees about the launch of new competition committees (including details on committee composition) and posting this information on the intranet	12. Recruitment	Continuous action	Department of Human Resources and General Affairs	**I:** Information to Institute employees about the appointment of new competition committee (including the composition of the committee) sent via email. **I:** Information about the appointment of new competition committee (including the composition of the committee) posted on the intranet. **T:** Employees have access to information regarding the appointment of new competition committee (including the composition of the committee).
Action 14.4 Developing a document (Guide for new employees joining IE PAS) about the functioning of the Institute (e.g., list of documents, introduction to administrative and research staff, and onboarding process)	12. Recruitment	Q2 2026 r.	Department of Human Resources and General Affairs, Scientific Department	**I:** A document (guide for new employees joining IE PAS) on the functioning of the Institute (including a list of documents, introduction to administrative and research staff, and onboarding process). **T:** New employees at IE PAS have access to information about the functioning of the Institute.
Action 14.5 Creating a template for the candidate questionnaire	12. Recruitment	Q4 2026	OTM-R Implementation Committee	**I:** Template of the questionnaire for job candidates. **T:** Job candidates have access to templates of documents required in the recruitment process.
Action 14.6 Creating a template for the competition committee's minutes	12. Recruitment	Q4 2026	OTM-R Implementation Committee	**I:** Template for the minutes of meetings of the competition committee.

				T: Uniform guidelines for preparing the minutes of competition committee meetings.
Action 14.7 Developing a template for feedback to participants in competition procedures, including strengths and weaknesses of their applications	12. Recruitment	Q4 2026	OTM-R Implementation Committee	**I:** Template for feedback to participants in recruitment processes, including strengths and weaknesses of their applications. **T:** Uniform guidelines for informing candidates about the strengths and weaknesses of their applications.
Action 14.8 Describing the appeals procedure and creating a template for appeals	12. Recruitment	Q4 2026	OTM-R Implementation Committee	**I:** An appeal procedure and template for appeals. **T:** Uniform rules for submitting appeals in the recruitment process.
Action 14.9 Developing and implementing a system for monitoring and controlling the quality of recruitment and its compliance with the OTM-R Policy	12. Recruitment	Q4 2026	OTM-R Implementation Committee	**I:** A system for monitoring and controlling the quality of recruitment. **T:** Quality control of recruitment processes and their compliance with the OTM-R Policy.
Action 14.10 Publishing all recruitment document templates on the website	12. Recruitment	Q4 2026	Department of Human Resources and General Affairs	**I:** Templates for all recruitment-related documents are posted on the website. **T:** Quality control of recruitment processes and their compliance with the OTM-R Policy. **T:** Job candidates have access to templates of documents required in the recruitment process.
ACTION 15 Development and implementation of career development paths for researchers at all	21. Postdoctoral appointments (Code)	Q2 2026	Scientific Department	**I:** The description of career development paths for researchers at all stages of

career stages	28. Career development 30. Access to career advice 36. Relation with supervisors 37. Supervision and managerial duties 38. Continuing Professional Development 40. Supervision			their career is developed as a document containing references to legal regulations and guides on academic advancement. **T:** Employees are familiar with the conditions for career development at all stages of their career and the support provided by the Institute in planning their career development path.
Action 15.1 Incorporating information regarding the support provided by academic supervisors to junior researchers, including support related to participating in and obtaining externally funded research projects in the career development path	21. Postdoctoral appointments (Code) 28. Career development 30. Access to career advice 36. Relation with supervisors 37. Supervision and managerial duties 38. Continuing Professional Development 40. Supervision	Q2 2026	Scientific Department	**I:** Information about the support provided to junior researchers by academic mentors, including assistance with participating in and securing research projects funded by external sources, is included in the description of career development paths for researchers at all stages of their career. **T:** Junior researchers receive support from their academic mentors, including assistance with participating in and securing research projects funded by external sources.
Action 15.2 Incorporating description of provisions/information regarding support for researchers in obtaining additional academic degrees in the career development path	21. Postdoctoral appointments (Code) 28. Career development 30. Access to career advice 36. Relation with supervisors	Q2 2026	Scientific Department	**I:** Information about support for employees in obtaining advanced academic degrees is included in the description of career development paths for researchers at all stages of their career. **T:** Employees receive support in obtaining advanced

	37. Supervision and managerial duties 38. Continuing Professional Development 40. Supervision			academic degrees.
Action 15.3 Making the career development path description for researchers at all career stages available on the intranet	21. Postdoctoral appointments (Code) 28. Career development 30. Access to career advice 36.Relation with supervisors 37. Supervision and managerial duties 38. Continuing Professional Development 40. Supervision	Q2 2026	Scientific Department	**I:** A description of career development paths for researchers at all stages of their career is posted on the intranet. **T:** Employees have continuous access to information about career development conditions at all stages of their career.
Action 15.4 Including recommendations for involving postdoctoral researchers in research projects in the Regulations for the implementation of research projects introduced by the Director's order of September 17, 2015	21. Postdoctoral appointments (Code)	Q4 2025	Director	**I**: 1. Changes to the Regulations for the implementation of research projects at IE PAS, including recommendations for involving postdoctoral researchers in research projects, introduced by the Director's order. 2. The revised Regulations for the implementation of research projects at IE PAS are posted on the intranet. **T**: Employees consider recommendations for involving postdoctoral researchers in research projects when

				preparing grant applications.
ACTION 16 Developing a list of training programs for employees at various stages of their career development	30. Access to career advice 39. Access to research training and continuous development	Q4 2025 r.	Department of Human Resources and General Affairs, Scientific Department	**I:** Providing employees with training tailored to different stages of their career development. **T:** Employees have increased access to training opportunities.
Action 16.1 Identifying training needs	30. Access to career advice 39. Access to research training and continuous development	Continuous action	Department of Human Resources and General Affairs, Scientific Department	**I:** Identification of training needs conducted through a survey on employee expectations regarding training topics. **T:** Employees are provided with training tailored to their needs.
Action 16.2 Offering training programs for employees on preparing research grant proposals	30. Access to career advice 39. Access to research training and continuous development	Q4 2025	Scientific Department	**I:** Providing employees with training on writing research project proposals. **T:** Employees are able to prepare research project proposals.
Action 16.3 Developing a list of training programs and publishing it on the intranet	30. Access to career advice 39. Access to research training and continuous development	Q4 2025	Department of Human Resources and General Affairs, Scientific Department	**I:** A list of available training sessions posted on the intranet. **T:** Employees have access to information about available training sessions.
Action 16.4 Regular mailing to the IE PAS employees with training proposals	30. Access to career advice 39. Access to research training and continuous development	Continuous action	Department of Human Resources and General Affairs, Scientific Department	**I:** Emails to employees containing training opportunities. **T:** Employees have continuous access to up-to-date information about available training sessions.

5. Implementation and Monitoring of the Strategy

5.1 Development and Implementation of the OTM-R Policy

IE PAS recognizes the Open, Transparent, and Merit-Based Recruitment (OTM-R) Policy as a key element of the HRS4R strategy. The main objectives of this policy are to ensure equal access to employment opportunities, promote fairness and transparency in recruitment processes, and select candidates based on their competencies and achievements. The implementation of the OTM-R Policy will be supported by appropriately selected tools. The OTM-R Policy will serve as a key set of principles and guidelines for Selection Committees prior to each recruitment process for research positions. The starting point for developing the OTM-R Policy will be a review of documents related to the employee recruitment process and best practices, which will form the foundation for the OTM-R Policy. We assume that these documents, along with the OTM-R Policy, will be continuously improved. Each recruitment process will conclude with a discussion and, if necessary, proposals for revisions or further details.

We plan to use the following OTM-R tools:

1. Review of recruitment policies prior to launching each recruitment process. The purpose is to ensure that the competition is planned and conducted in accordance with OTM-R principles at each stage.
2. Training for staff participating in Selection Committees. These trainings aim to ensure that participants are aware of the need to apply OTM-R principles in their daily work. Training topics will include, for example, non-discrimination, transparency of processes, and merit-based evaluation.
3. Reporting on the recruitment process. The introduced reporting rules will enable all participants in the recruitment process to engage actively and responsibly. Ultimately, reporting will ensure the monitoring and evaluation of the effectiveness of our recruitment processes in subsequent editions and their continuous improvement.

The implementation of OTM-R principles at the Institute will include activities aimed at promoting transparency, openness, and recognition of diverse merits. To this end, the following actions, among others, will be undertaken:

1. All job postings will be published in an accessible and transparent manner, ensuring equal opportunities for all candidates. Since we use various communication channels to reach the widest possible group of potential candidates, the published announcements will be appropriately tailored in format to attract broad interest in our institution's job offerings.
2. We will promote diversity and inclusivity in research teams so that our recruitment processes are open to candidates from different backgrounds. Additionally, the application of clear candidate evaluation criteria should strengthen and validate the favorable working conditions in our institution.
3. Recruitment decisions are and will continue to be made based on objective criteria related to the candidates' competencies, experience, and achievements. We will improve evaluation methods designed to minimize subjectivity and ensure fairness for all candidates.

The development of the OTM-R Policy is reflected in the HRS4R implementation plan for IE PAS. The planned actions stem from the findings outlined in the OTM-R checklist. Below, we present the planned actions in connection with this checklist.
Action 13, concerning the development and implementation of the OTM-R Policy, responds to the questions of whether we have provided principles describing the recruitment of research staff and whether we have an internal guide outlining OTM-R procedures and practices for all types of positions. The planned actions 13.1 – 13.11 relate to the principles contained in the OTM-R Policy and their dissemination, communication, and practical application. Action 14, which focuses on the development of procedures and instructions related to implementing the OTM-R Policy, and the actions contained in this section 14.1 – 14.10, address questions regarding the broadly understood standards for the work of selection committees. The preparation and implementation of procedures and document templates will directly impact the recruitment of valuable candidates, the professional conduct of the selection process, and the onboarding of new employees.
Some actions listed in points 13 and 14 of the implementation plan are responses to several questions in the OTM-R Checklist. In many cases, multiple actions must be undertaken to ensure that the recruitment process aligns with OTM-R principles. Below are the direct links

between the questions in the OTM-R Checklist (Appendix No. 2) and the actions in the strategy implementation plan.

Question Number (OTM-R Checklist) – Action Number (HRS4R Implementation Plan)

Question 1 – Action 13.1, 14.3

Question 2 – Action 14.1, 14.2, 14.6, 14.8

Question 3 – Action 13.2

Question 4 – Action 13.6, 14.10

Question 5 – Action 14.9

Question 6 – Action 13.6, 13.7, 13.9, 13.10, 13.11

Question 7 – Action 13.3

Question 8 – Action 13.6

Question 9 – Action 13.7, 14.2, 14.4

Question 10 – Action 14.9

Question 11 – Action 13.6

Question 12 – Action 13.6

Question 13 – Action 13.6

Question 14 – Action 13.6, 14.5

Question 15 – Action 14.5, 14.8

Question 16 – Action 13.4

Question 17 – Action 13.4, 14.3

Question 18 – Action 13.4

Question 19 – Action 13.5

Question 20 – Action 13.8, 14.7

Question 21 – Action 13.8

Question 22 – Action 14.8

Question 23 – Action 14.9

Our actions, through alignment with the OTM-R Checklist, are more cohesive and effective, contributing to the achievement of HRS4R objectives. Regular reviews and updates of the recruitment practices, especially during the implementation period of the OTM-R Policy, will ensure consistent efforts toward excellence and compliance with the best European standards.

5.2 Implementation of the Principles of the European Charter for Researchers and the Code of Conduct for the Recruitment of Researchers

5.2.1. Actions Supporting the Implementation of the HRS4R Strategy

Effective implementation of the HRS4R strategy at IE PAS requires taking into account, on the one hand, the barriers present within the Institute that hinder its functioning and development, and, on the other hand, the challenges and potential benefits that will result from the successful execution of this strategy. Given that the Institute is a relatively small research unit, with a limited number of staff, all researchers and administrative employees will be able to participate in the strategy's implementation process. For most tasks arising from the adopted strategy, it will be necessary to establish teams to develop and implement new solutions. Furthermore, the proper course of implementation will require efficient communication among all stakeholders, who will be the future beneficiaries of this process.

The analysis of the degree of implementation of the HRS4R principles at the Institute allowed the identification of areas where action is needed. This pertains especially to areas related to the implementation of principles concerning research ethics, career planning and professional development of researchers, as well as recruitment and employee evaluation methods.

Due to the organizational and legal constraints resulting from the Act of April 30, 2010, on the Polish Academy of Sciences (https://isap.sejm.gov.pl/isap.nsf/download.xsp/WDU20100960619/U/D20100619Lj.pdf), as well as financial limitations—which often hinder or even prevent the required improvement of working conditions for researchers—the identification of gaps in the application of HRS4R principles highlighted the need to flexibly adapt new solutions to existing constraints. This applies, for example, to the two most significant identified gaps (Appendix No. 1) related to teaching and career development, which are regulated by the Institute's existing legal framework.

With regard to teaching, the Institute’s mission, as defined by legal regulations, is limited to conducting scientific research activities. Although this does not preclude Institute employees from engaging in teaching or expert activities, these activities are conducted outside the Institute and are therefore not subject to evaluation or rewarded. In practice, employees can only be encouraged to engage in such activities.

Similarly, the career development gap is conditioned not only by legal provisions but also by financial constraints. The Act on the Polish Academy of Sciences does not include requirements for obtaining academic degrees nor does it establish a career development pathway. Although the Institute's interests point to the need for actions that support the career development of researchers, limited financial resources significantly constrain the scope and effectiveness of such actions. In practice, these efforts are focused on supporting Institute employees in applying for research grants funded from external sources, primarily from institutions with public funding. These grants currently represent the most important method of financing scientific research at the Institute, which builds the academic standing of individual researchers and determines the pace of their career progression. In this context, we can seek and implement solutions to enhance the effectiveness of support for Institute employees in the preparation of research programs that have the potential to secure funding for their execution. All actions included in the HRS4R implementation plan address the identified needs of IE PAS in terms of research practices, employee recruitment, the work environment, and career development conditions. All planned activities will be carried out in accordance with the principles of HR Excellence. The HRS4R implementation plan (Action Plan) ensures a systematic approach to management, increasing the likelihood of success in achieving the strategic objectives of this program. Within this framework, the following actions are planned:

1. Establishing teams to develop and implement new or improve existing solutions. These teams will consist of researchers and administrative staff with complementary skills to leverage synergy in seeking and implementing solutions that, to the greatest extent possible within the aforementioned constraints, align with HRS4R strategy principles.
2. Creating a monitoring team responsible for ongoing and systematic supervision of the implementation of the entire plan, as well as effective response in problem situations. Key performance indicators (KPIs) linked to planned actions and the work schedule will be used to assess implementation progress. The Steering Committee will be informed of the monitoring team's progress through regular reports.
3. Establishing a Steering Committee as a decision-making body to oversee the implementation of HRS4R in a manner that ensures alignment of implemented solutions with the intended goals and HR Excellence principles. Given the continuously

emerging needs and opportunities for improvement and the dynamic environment in which each implementation process will occur, the Committee will adopt a flexible approach to the planned implementations.

4. Consulting with stakeholders on issues related to adapting new solutions to their real needs and expectations.
5. Consulting with external experts in situations where additional expertise is required. It is anticipated that consultations will frequently involve lawyers, ICT specialists, HR experts, and research project management specialists.
6. Applying methods, techniques, and tools used in teamwork for developing new solutions. These will be used at all work stages, particularly in creative problem-solving (e.g., brainstorming or mind mapping) as well as in document creation and meeting organization. It is expected that IT tools, particularly for collaborative text editing and remote communication, will provide crucial support for teamwork.

The types of actions outlined above will be fundamental in the process of implementing HRS4R requirements and HR Excellence principles at IE PAS. This will be facilitated by clearly defined actions with appropriate metrics, provision of necessary competencies, a transparent division of responsibilities and authority, and ensuring essential resources. The content presented in the following sections provides a detailed account of our implementation plans, ensuring the success of this endeavor.

5.2.2. Monitoring of HRS4R Implementation Progress by the Monitoring Team

Effective implementation of HRS4R will require monitoring and reporting progress, practicing the review of recommended solutions by key stakeholders, implementing necessary adjustments, and communicating completed tasks and implemented solutions. The Monitoring Team, appointed to oversee the implementation process, will meet regularly at the end of each quarter. The purpose of these meetings will be to assess the results of the tasks outlined in the plan for that period. Entities responsible for specific tasks in a given quarter will present the results of their actions to the Team members in a predetermined format. Each quarterly meeting of the Monitoring Team will conclude with the preparation of a report. This report will contain an evaluation of task execution and recommendations for necessary adjustments. The quarterly report will be submitted to the Steering Committee, which will approve the results or recommend necessary corrections.

1. Monitoring progress will be based on the established strategy implementation plan. This plan will include tasks, the individuals or units responsible for task execution, the work schedule, and the specified key performance indicators (KPIs).
2. The quarterly progress reporting system will facilitate effective communication among all stakeholders involved in the implemented strategy and support the achievement of high-quality results from the undertaken actions. Each report will contain an assessment of the actions taken and the documents developed, along with recommendations regarding implementation or the need for improvement before implementation.
3. Reviewing progress will occur at the end of each quarterly reporting period. The primary advisory body at the Institute is the Scientific Council. During the HRS4R implementation, the Scientific Council will be kept informed of progress. In special cases involving solutions that impact administrative activities, consultations will be held with lawyers and other external specialists, such as ICT experts, research project management consultants, or specialists in research commercialization.
4. Recommendations for changes included in the quarterly report by the Monitoring Team and collaborating experts will support the Steering Committee in decision-making.

5. Communicating implementation progress to Institute staff will occur during biannual meetings with all employees, as mentioned in the next point. Additionally, such information will be regularly available on the intranet and communicated via email. The aim of this communication is to increase transparency in the creation of new systemic solutions and to obtain constructive feedback from all stakeholder groups

The application of the above methods and tools will enable effective monitoring of HRS4R implementation progress and allow for prompt responses to emerging issues.

5.2.3. Engagement of Key Stakeholders in the HRS4R Implementation Process

Engaging the entire Institute community, including key stakeholders in the HRS4R implementation process, is a crucial condition for the success of this process, as it increases the likelihood of formulating appropriate solutions and accelerating their implementation. The most important decision-making body at the Institute is the Scientific Council. Since the Council includes not only representatives of Institute employees but also researchers from other scientific institutions, this broadens the group of people involved in reviewing proposed solutions. This will add further value to the process by providing a more objective and independent assessment of the overall process, less influenced by internal conditions. The involvement of employees who are members of various committees established at the Institute will be particularly important during the consultation and review stages. These include, in particular, the Selection Committee responsible for evaluating the suitability of candidates for research positions, the Incentive System Committee, and the Committee for Assessing Research Activity. To increase active employee participation in the HRS4R implementation process, additional actions will be taken, such as employee meetings, discussion forums, employee surveys, newsletters, training sessions, and team projects.

1. Employee meetings, held twice a year, focus on the Institute's operations. During these meetings, the Institute's achievements, financial situation, current issues, as well as goals and development plans are discussed. Each meeting will also include presentations on the progress of HRS4R implementation work and planned actions. Each presentation will conclude with a Q&A session, providing employees the opportunity to share comments and suggestions on the implementation activities.
2. Discussion forums, conducted digitally via the Teams communicator and/or intranet, will provide a space for open discussion on topics related to the strategy

implementation. Responsibility for coordinating and ensuring transparency in communication channels and discussion threads will be established before the implementation process begins.

3. Employee surveys will be conducted at the end of the implementation period to obtain feedback on the effectiveness of the actions taken before the conclusion. The survey results will be compared with those from the initial phase of preparing to implement the principles of the European Charter for Researchers and the Code of Conduct for the Recruitment of Researchers, which aimed to identify gaps in the application of HR Excellence principles.
4. Newsletters will serve as an additional means of communicating implementation progress to all stakeholders. After each quarterly reporting period, a newsletter will be prepared and distributed to inform about the completed implementations.
5. Employee training will be organized when new regulations or Institute procedures are introduced. The training sessions will be offered to all or selected groups of employees, either in-person or remotely, to enable participation regardless of their current location.
6. Team projects will be the primary means of executing actions included in the strategy implementation plan. The verification, refinement, and development of new documents, as well as the organization of training sessions, will require the collaboration of numerous administrative and research employee. For each action, teams will be formed, comprising individuals with the necessary and complementary skills.

By engaging researchers in the HR Excellence strategy implementation process, we ensure that their needs and expectations are considered. This increases the chances of the strategy's success by building the engagement and support of researchers, which are essential for the smooth progression of the entire process.

5.2.4. Alignment of Organizational Policies with HRS4R Principles

Aligning organizational policies with HRS4R requires actions that will lead to the integration of HRS4R principles into the overall research strategy of IE PAS. This multi-stage process will involve all employee groups: research, research-technical, and administrative staff. Each action included in the strategy implementation plan will follow the same framework outlined

below:

1. Review of current policies to assess alignment with HRS4R principles.
2. Consultations with key stakeholders to gather their opinions, needs, and expectations related to their research activities.
3. Development of an adaptation plan to align current policies with HRS4R principles.
4. Preparation of a work schedule for the action based on the strategy implementation plan.
5. Assignment of responsibilities to individuals for specific tasks.
6. Development of new solutions to ensure the integration of organizational policies with HRS4R principles.
7. Evaluation of results by the Implementation Team.
8. Approval or recommendation of adjustments by the Steering Committee for the implemented solutions.

It is assumed that the project work will be completed once the proposed solution is accepted by the Steering Committee. As mentioned previously, each new implementation will be communicated to all stakeholders through available channels (meetings, training sessions, newsletters, intranet announcements), with an emphasis on how it contributes to meeting HRS4R requirements. The purpose of these actions is to enhance the Institute's image as an attractive workplace that meets the standards of scientific excellence. This will not only support the professional development of the Institute's staff but also attract talented young researchers and established researchers with recognized academic achievements.

5.2.5. Ensuring the Implementation of Proposed Actions

To ensure the effective implementation of actions related to the integration of HRS4R with organizational policies, it is necessary to develop a comprehensive implementation plan with clearly defined responsibilities, timelines, and monitoring mechanisms. Teams responsible for implementation activities will be required to plan their tasks, allocate resources, communicate effectively with stakeholders, and, if necessary, provide training for employees. Below are the essential conditions for carrying out the implementation activities:

1. Developing a detailed implementation plan to define tasks and select methods and forms for communicating new solutions and providing feedback on implementation progress.

2. Providing teams with sufficient resources: financial, material, and intangible resources, as well as work tools and technologies to support the execution of individual tasks related to the implementation of new solutions.
3. Developing a comprehensive communication strategy to ensure consistent and coordinated information flow to all stakeholders about implementation progress. An important element of this communication strategy will be securing feedback from all stakeholders to monitor progress.
4. Creating training programs related to new solutions being implemented, organizational policies, and HRS4R principles. Participation in these training sessions will be mandatory for all research staff.

The Monitoring Team will monitor and evaluate the implemented actions based on the HRS4R implementation plan and established key performance indicators for each action, to facilitate necessary adjustments to current solutions or the development of new ones.

5.3. Schedule for Monitoring Progress and Evaluating the Effectiveness of HRS4R Implementations

An essential condition for effectively monitoring the progress of HRS4R implementations will be the development of a monitoring plan with a clearly defined schedule of activities. As part of this plan, the following actions will be undertaken:

1. Establishing key performance indicators (KPIs) for new or improved solutions planned for implementation at the Institute.
2. Developing a monitoring schedule. To enhance the transparency of planned and monitored implementations, we propose creating a Gantt chart to visually represent the action plan on a timeline. The monitoring schedule will align with a quarterly cycle of activities, consultations, and approvals of new solutions. The results of actions assessed using KPIs will be presented in quarterly reports.

   Q1 2025 – Report on Action 3 implementation

   Q2 2025 – Report on Actions 1, 3, 6, 6.1, 9, 9.1, 9.2

   Q3 2025 – Report on Actions 1.1, 1.2, 1.3, 1.4

   Q4 2025 – Report on Actions 2, 4, 5, 8, 8.1, 8.2, 10, 10.1, 10.2, 10.3, 10.5, 11, 15.4

   Q1 2026 – Report on Actions 13.3, 13.4, 13.5, 13.6, 13.7, 13.8, 13.9, 13.10, 13.11

Q2 2026 – Report on Actions 7, 7.1, 7.2, 10.6, 13, 13.1, 13.2, 14.4, 12, 12.1, 12.2, 15, 15.1, 15.2, 15.3, 16

Q3 2026 – Verification of corrected actions

Q4 2026 – Report on Actions 14, 14.1, 14.2, 14.5, 14.6, 14.7, 14.8, 14.9, 14.10, 16.2, 16.3

Results from the monitoring of continuous activities (Actions 6.2, 10.4, 14.3, 16.1, 16.4) will be included in each quarterly report. Based on these quarterly reports, a Final Report will be prepared. This Final Report, developed from the quarterly reports, will be subject to consultation with key stakeholders, including the Institute's Scientific Council. After obtaining their feedback, the Steering Committee will decide on any necessary adjustments and finalize its content.

To continuously measure HRS4R implementation progress before each subsequent evaluation, key performance indicators (KPIs) have been defined for each action. During progress monitoring, the Monitoring Team may review the KPIs in response to external changes affecting the Institute's organizational, legal, or financial conditions.

The defined KPIs at this stage relate to anticipated events, conditions, documents, processes, and employee attitudes and behaviors. Special attention in measuring HRS4R implementation progress will be focused on those principles where the most significant gaps were identified, namely: support for career development and recognition of teaching activities by researchers. Subsequently, progress measurement will address gaps related to researchers' responsibility and public engagement, the recruitment process, access to career counseling, and the introduction of procedures for filing complaints and appeals in various problem situations. For other principles, the adaptation processes will only require minor adjustments to existing documents and making them available in digital form, or effectively communicating the applicable regulations.

The universal quantitative performance indicators in our HRS4R implementation plan include:

1) Number of developed or improved documents, including regulations, procedures, codes of conduct, and templates for forms/applications/plans/reports/information provided to employees, used at the end of the implementation period in specific HR and administrative processes.

2) Number of training sessions, employee meetings, and consultations with various stakeholders.
3) Number of notifications sent to employees and documents, information, and instructions posted on the intranet.
4) Number of questions included in employee opinion surveys.

The quality of new solutions will be assessed by the Monitoring Team and the Steering Committee on an ongoing basis within planned quarterly reporting cycles. A final qualitative evaluation of the implemented solutions will be conducted in an employee opinion survey scheduled for the end of the implementation period.

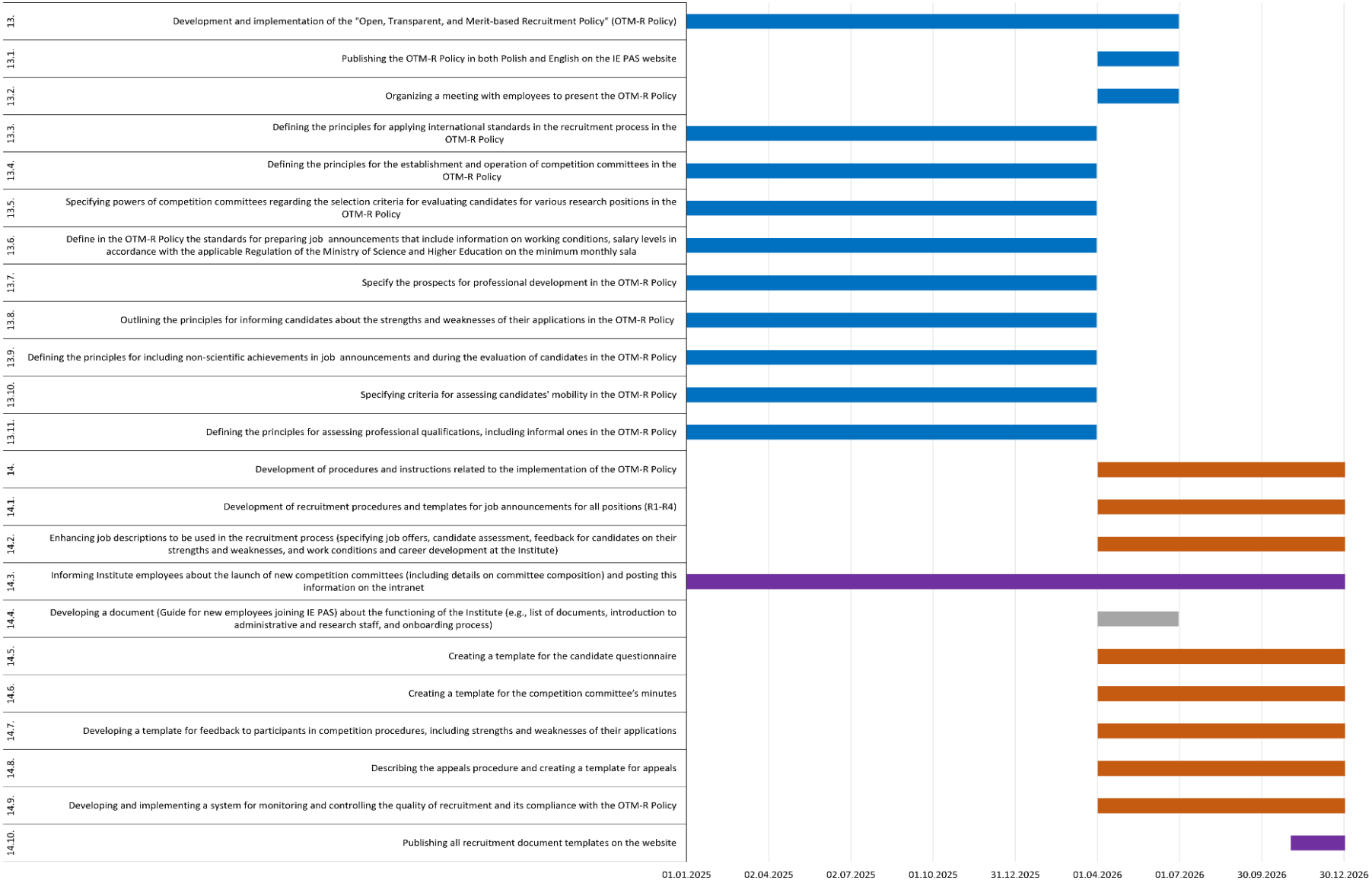
The measurement of implementation activities will be included in quarterly reports and the Final Report. Any deviations will require additional consultations with stakeholders and external consultants to ensure the requirements of HRS4R are ultimately met. Conducting quarterly monitoring will enable a comprehensive assessment of the Institute's strengths and weaknesses and determine further development directions. The Final Report will provide a summary of implemented solutions using KPIs in relation to the HR Excellence principles.

Chart 12. Implementation of Ethical and Professional Principles

Organizational units responsible for carrying out specific actions:

Scientific Council of IE PAS	
Committee for Ethics in Scientific Research	
Director	
Administration Department	
Scientific Department	
Department of Human Resources and General Affairs	
Department of Human Resources and General Affairs, Scientific Department	

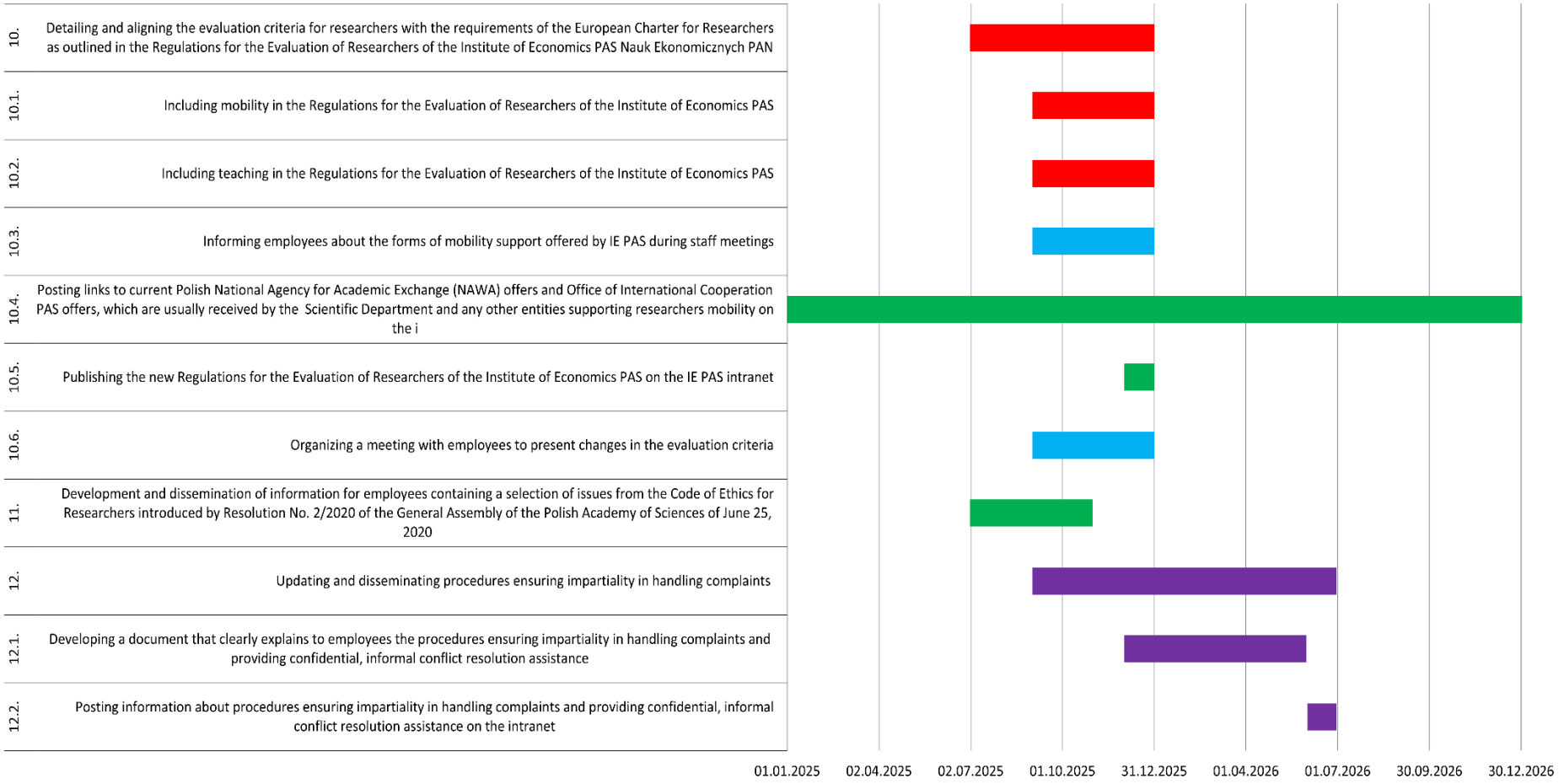
Chart 13. Implementation of Recruitment and Selection Principles



Organizational units responsible for carrying out specific actions:

Director	
OTM-R Implementation Committee	
Department of Human Resources and General Affairs	
Department of Human Resources and General Affairs, Scientific Department	

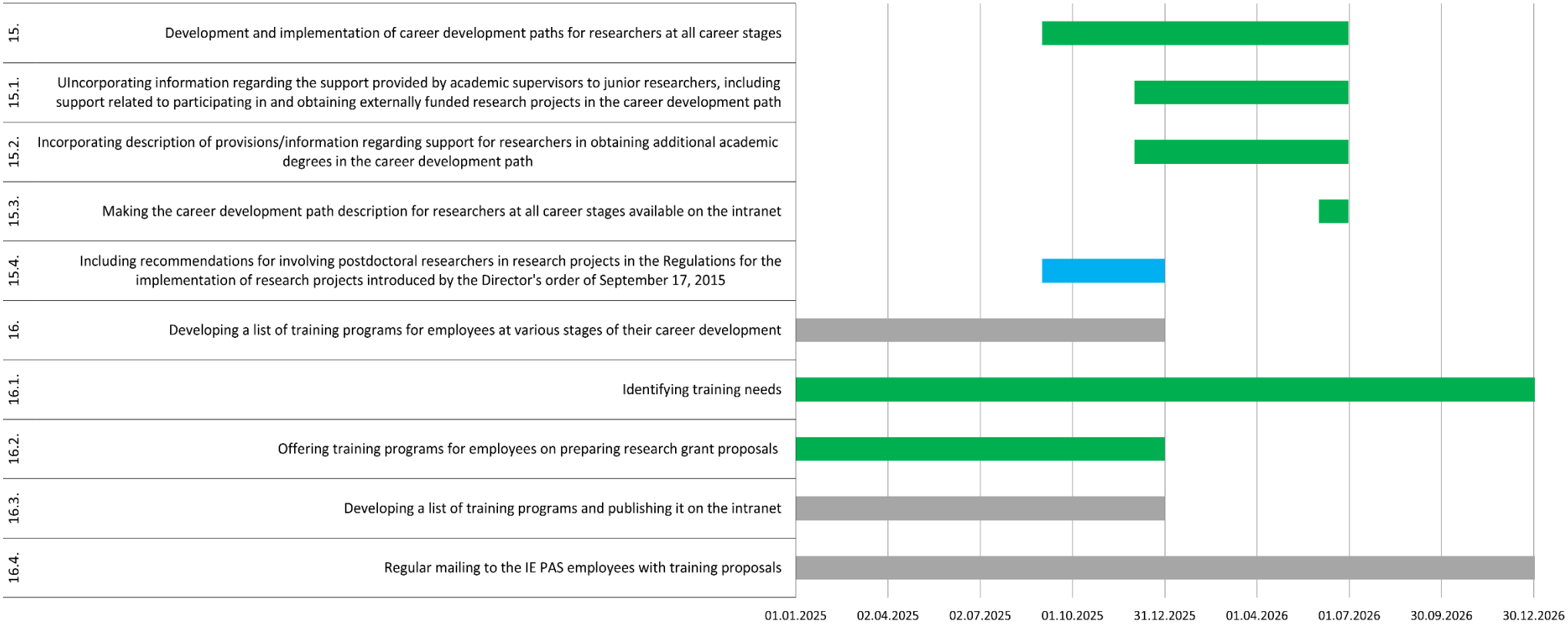
Chart 14. Implementation of Principles Regarding Working Conditions and Social Security



Organizational units responsible for carrying out specific actions:

Scientific Council of IE PAS	
Director	
Scientific Department	
Department of Human Resources and General Affairs	

Chart 15. Implementation of Principles Regarding Development and Training



Organizational units responsible for carrying out specific actions:

Director	
Scientific Department	
Department of Human Resources and General Affairs, Dział Naukowy	

SUMMARY

The intention behind the documents published nearly 20 years ago by the European Commission—the European Charter for Researchers and the Code of Conduct for the Recruitment of Researchers—was to harmonize the internal conditions within the research sector. This harmonization was recognized as one of the conditions for accelerating European integration processes. The use, application, and implementation of the principles outlined in both documents into the human resources strategy within the research sector was intended, and remains intended, to facilitate the integration of research institutions with the European Research Area. The Institute's involvement in this direction of the European Commission's actions represents another step in the long-standing process of internationalizing the research conducted at the Institute.

Although IE PAS ranks among Poland's leading research institutions (holding category A), a thorough review of the principles contained in the Charter and Code, and comparing these principles with the Institute's legal framework and practices, has allowed for a critical assessment of its functioning in light of developmental challenges. This includes identifying strengths and weaknesses, persistent barriers, and developmental factors.

This process has revealed areas where the Institute does not fully align with European principles, along with gaps in its legal framework and administrative procedures. Consequently, it has identified necessary action directions to harmonize the Institute's regulatory environment with European requirements and make appropriate adjustments or corrections to existing procedures. This particularly pertains to the implementation of European principles for recruiting researchers as formulated in the Code.

A detailed analysis of the European Charter for Researchers also revealed areas of divergence between the European approach to knowledge sources (scientific research, teaching, and developing external expert reports) and the scope of researchers' responsibilities versus the scientific policy in Poland. The latter is reflected in the categorization system of research institutes in Poland. Furthermore, this analysis indicated the need to implement and broadly utilize new management tools, especially the potential of the intranet as a communication tool.

It should be emphasized, however, that the survey conducted within the Institute as part of the Human Resources Strategy for Researchers—which covered all researchers except those on unpaid leave—demonstrated that the vast majority of practices implemented and carried out at the Institute align with the requirements of the European Human Resources Strategy for Researchers. However, not all of these practices have sufficient legal backing, necessitating further specification or supplementation. Finally, an important conclusion from this study is the need to disseminate knowledge about existing regulations and practices applied within the Institute. These shortcomings, however, relate to only a few types of actions, the implementation of which has been committed to in the new Strategy of the Institute.

Annex No. 1- Gap analysis

European Charter for Researchers and Code of Conduct for the Recruitment of Researchers: GAP analysis overview			
Status: to what extent does this organisation meet the following principles?	Implementation: ++ = **fully** implemented +/- = **almost but not fully** implemented -/+ = **partially** implemented -- = **insufficiently** implemented	In case of --, -/+, or +/-, please **indicate the actual "gap**" between the principle and the current practice in your organisation. If relevant, list any national/regional legislation or organisational regulation currently impeding implementation	Initiatives undertaken and/or suggestions for improvement: When **++**, the institution is required to provide evidence of the specific case (i.e., examples of programmes, policy in practice, etc.). When **+/-** or **-/+**, it should include a description of the gap, as well as details about the measures the institution will undertake to fill the gap and address it.
Ethical and Professional Aspects			
1. Research freedom	+/+	Survey results show that IE PAS employees respondents have no doubts about the freedom of scientific research at the Institute. All responses (100%) to the survey question were positive. Article 73 of the Constitution of the Republic of Poland guarantees everyone the freedom of artistic creation, scientific research and the dissemination of their results, the freedom to teach, as well as the freedom to enjoy cultural goods. Researchers at IE PAS are ensured freedom in formulating research problems and methods for solving them. These topics are planned on annual basis and approved by the Institute's Scientific Council in accordance with paragraph 17 point 2 paragraph 3 of the IE PAS Statute.	**No Action Required** **Evidence** Since the creation of IE PAS, researchers have independently selected the topics and methods of their research. This has been one of the key principles of IE PAS's functioning. In their annual reports, researchers independently declare their research topics for the upcoming year. They do not need to be approved by supervisors. The researchers task cards attached to their employment contracts do not include any clause obliging researchers to conduct research assigned by a supervisor or other institutions. The decision to undertake research within a given area is left to the discretion of the researcher. Currently, researchers still independently propose and submit their research topics to the Scientific Department, which then presents them at the meeting of the Scientific Council dedicated to the annual

			report on the Institute's activities and plans for the next year. These documents are approved by the Scientific Council. Article 17, point 2, paragraph 3 of the IE PAS Statute: https://inepan.pl/images/pliki/inne/Statut_26.04.2012.pdf
2. Ethical principles	+/-	Scientists at IE PAS adhere to the recognized practices and ethical principles of their respective disciplines, as well as the ethical norms outlined in the codes of ethics. This commitment is confirmed by 94.6% positive responses in the survey. Since December 14, 2023, the IE PAS Committee for Ethics in Scientific Research has been operational, established by Resolution No. 11 of the Scientific Council. The Code of Ethics for Researchers introduced by Resolution No. 2/2020 of the General Assembly of the Polish Academy of Sciences of June 25, 2020, is in effect at the Polish Academy of Sciences. Additionally, PAS has its own Committee for Ethics in Science https://bip.pan.pl/artykuly/75/komisja-ds-etyki-w-nauce A dedicated section on the publicly accessible website of IE PAS provides information about the activities of the Committee for Ethics in Science of the Polish Academy of Sciences, the Code of Ethics for Researchers in force at PAS, and the activities of the PAS Ethics Committee in Science: https://inepan.pl/etyka-badan-naukowych/. According to paragraph 22 of the IE PAS Statute, the Scientific Council appoints a disciplinary committee. Paragraph 22 establishes a disciplinary spokesman, who initiates explanatory proceedings.	**Action 1** Development and dissemination of the operating principles for the IE PAS Committee for Ethics in Scientific Research, established by the IE PAS Scientific Council on December 14, 2023. **Action 1.1** Development and dissemination of a research description application form template. **Action 1.2** Development and dissemination of a participant consent form template for research participation. **Action 1.3** Dissemination of a consent form for data processing, including an information clause. **Action 1.4** Development and dissemination of an information template for research participants.

		Despite the positive assessment by respondents, it is noted that the IE PAS Committee for Ethics in Scientific Research currently lacks clearly defined operating procedures.	
3.Professional responsibility	+/-	Survey results show that IE PAS employees have no doubts about adherence to professional responsibility principles by the Institute's researchers. According to the majority (83.7%) of respondents, the Institute's researchers strive to ensure that their research has relevance for the society. Similarly, nearly all responses (94.6%) are positive regarding the respect for intellectual property rights, including avoiding plagiarism. In Poland, the Act of February 4, 1994, on Copyright and Related Rights is in effect. Additionally, since June 18, 2015, IE PAS has implemented the Regulations on the management of copyright and related rights, industrial property rights and the principles of commercialization of the results of scientific research and development work at IE PAS, available on the Institute's website: https://inepan.pl/wp-content/uploads/2024/07/Regulamin-zarzadzania-prawami-autorskimi-i-pokrewnymi-prawami-wlasnosci-przemyslowej-oraz-zasady-komercjalizacji-wynikow-badan-naukowych_18.06.24.pdf. Despite the positive assessment by employees, it should be noted that the aforementioned Regulations have been in effect since 2015 and therefore require updating.	**Action 2** Updating and disseminating the Regulations on the management of copyright and related rights, industrial property rights and the principles of commercialization of the results of scientific research and development work at IE PAS

4. Professional attitude	+/-	Survey results show that IE PAS employees adhere to the principle of professionalism in their work. Almost all the respondents (83.7%) indicate that employees inform the Scientific Department about any changes in their projects. At the same time, a total of 27.0% of respondents are not familiar with the Institute's strategic goals. The Institute's strategic goals are presented in the annual reports on the Institute's scientific activities. However, the mission and strategic goals of the Institute have not been formulated in a separate document. The obligation to inform about changes in research projects stems from agreements with grant providers and from the Regulations for the implementation of research projects introduced by the Director's order of September 17, 2015. All researchers working on a project funded from external sources are required to familiarize themselves with and adhere to these Regulations. Changes made to projects are continuously agreed upon with the IE PAS management. Annual meetings are organized with employees during which the criteria for evaluating scientific units are presented. For each subsequent 4-year period for which scientific units are evaluated, researchers are given minimum requirements concerning scientific achievements that they should strive to meet. The progress is verified on annual basis. Despite a positive assessment of employees, it should be noted that employees have difficult current access to the provisions regulating working conditions, internal regulations of IE	**Action 3** Place the mission and strategic goals of IE PAS on the main page of the Institute's website. **Action 4** Clarify in the Regulations for the implementation of research projects at IE PAS the procedures for confirming researchers knowledge of the regulations applicable to this area of the Institute's activities. **Action 5** Develop and disseminate to employees information outlining the principles of evaluating scientific units and the principles of periodic evaluation of scientific staff

		PAS and those resulting from contracts with funders. Moreover, despite the existence of good practices, researchers are sometimes not aware of the existence of a given regulation.	
5. Contractual and legal obligations	+/-	Survey results show that IE PAS employees are aware of and respect the universally applicable regulations concerning working conditions and training, IE PAS's internal regulations, and requirements specified in grant agreements. Positive responses regarding knowledge of the above categories of regulations were given by 83.8%, 81.1%, and 89.2% of IE PAS respondents, respectively. Despite a positive feedback from employees, it should be noted that access to regulations on working conditions, IE PAS's internal regulations, and those resulting from grant agreements is currently limited. Additionally, despite the presence of good practices, employees sometimes lack awareness of specific regulations.	**Action 6** Develop information for employees that includes working conditions and training, IE PAS's internal regulations, and requirements specified in grant agreements **Action 6.1** Place information on the intranet regarding working conditions and training, IE PAS's internal regulations, and requirements outlined in grant agreements **Action 6.2** Provide ongoing notifications via email to researchers about training organized by research funding bodies related to the implementation and settlement of research projects
6. Accountability	-/+	Survey results show that IE PAS employees adhere to the principles of accountability. According to 83.8% of the Institute's respondents, researchers manage the finances of research projects in a diligent, transparent, and effective manner. However, 16.2% of respondents lack knowledge on this topic. It should be noted that regulations regarding the expenditure of funds in research projects are outlined in agreements between the funding body, the project manager, and the Institute. Therefore, the contents of these agreements are not known to all respondents. Additionally,	**No action required regarding grant financial management.** **Evidence** Regulations for the implementation of research projects introduced by the Director's order of September 17, 2015 available on the intranet: https://inepan.pl/wp-content/uploads/2024/07/Regulamin-realizacji-projektow_17.09.2015.pdf. **Actions required regarding data management** **Action 7**

		not all the Institute employees, especially those at the beginning of their scientific careers, have conducted or are conducting research projects, which may limit their knowledge in this area. IE PAS adheres to Regulations for the implementation of research projects introduced by the Director's order of September 17, 2015. Regarding whether data and research results are continuously collected and stored by scientists and accessible in the case of a potential failure or audit, 40.5% of respondents answered negatively. The internal document governing the recording and storage of research work at IE PAS is Order No. 1/2020 of the Director of the Institute of Economic Sciences of the Polish Academy of Sciences of January 30, 2020 on the introduction of the rules for applying 50% of the costs of obtaining income from an employment relationship at the Institute of Economic Sciences of the Polish Academy of Sciences. According to this document, researchers are required to maintain records of works protected by copyright or related rights for the purposes of appropriate audits. Data management plans for scientific projects, funded e.g., by the National Science Centre, are created at the application stage. If funding is obtained, the plans approved by the sponsor must be followed. Work conducted as part of statutory activities or projects is also collected by the Scientific Department of IE PAS. Similarly, information on the publications of researchers is collected.	Clarifying the principles regarding the collection, backup, and storage of research results by researchers at IE PAS. **Action 7.1** Implementing a dedicated cloud service (password-protected) for a long-term storage of data and research results. **Action 7.2** Publication of the principles regarding the collection, backup, and storage of research results by researchers at IE PAS on the intranet. **Action 8** To describe the principles for managing research data in projects conducted at the Institute in the Regulations for the implementation of research projects at IE PAS **Action 8.1** To appoint a Research Data Management Officer for projects conducted at the Institute **Action 8.2** To post information on the intranet regarding the principles of managing research data in research projects conducted at IE PAS

7. Good practice in research	+/+	Survey results show that respondents have no doubts about IE PAS employees adhering to good practices in scientific research and information confidentiality. Specifically, 91.9% of respondents agreed that Institute employees are aware of and follow regulations regarding the protection of personal data and confidentiality of information. National regulations on data protection are contained in the Act of May 10, 2018 on the protection of personal data. The data protection policy at IE PAS was introduced by Order No. 2/2019 by the Director of IE PAS, dated February 19, 2019. Additionally, the Institute's administrative staff have undergone training on the application of General Data Protection Regulation (GDPR) principles.	**No action required.** **Evidence** The document on the data protection policy is available on the intranet in the employee panel: https://inepan.pl/wp-content/uploads/2024/07/Polityka-ochrony-danych-osobowych-w-INE-PAN_19.02.2019.pdf
8. Dissemination, exploitation of results	+/+	Survey results show that respondents have no doubts about the implementation of the principle of dissemination and utilization of results by IE PAS's researchers. Positive responses were given by 89.2% of the surveyed individuals. The results of research conducted at IE PAS are widely disseminated and made available in the form of scientific articles, monographs, and working papers. Every researchers of the Institute is required to present their research results at an IE PAS seminar once a year. Additionally, Institute researchers participate in national and international conferences, including those organized by the Institute.	**No action required.** **Evidence** Seminars are posted on the YouTube channel: https://www.youtube.com/@INEPAN The Institute maintains profiles on the following platforms: https://www.linkedin.com/showcase/instytut-nauk-ekonomicznych-pan/about/ https://www.facebook.com/MBAINEPAN/ Additionally, some employees actively use their social media profiles to promote research results achieved at IE PAS.

		Many scientists also take part in television programs and radio broadcasts.	
9. Public engagement	-/+	Survey results show that respondents have concerns about the communication of research results conducted at IE PAS in a manner understandable to non-specialists in the field. A substantial fraction of respondents (40.5%) answered negatively to this question. There are no uniform standards for communicating research results conducted at IE PAS in a non-technical manner.	**Action 9** To develop guidelines for communicating research results in a non-technical manner **Action 9.1** To inform employees about the social media channels used by the Institute and to encourage them to participate in creating a network to reach a broader audience **Action 9.2** To provide employees with training on scientific communication and media collaboration
10. Non discrimination	+/+	Survey results show that respondents have no doubts about adherence to non-discrimination principles at the Institute. Nearly all responses (91.9%) were positive. In Poland, the Act of December 3, 2010, on the implementation of certain European Union provisions on equal treatment is in force. The Gender Equality Plan was introduced by Director's Order No. 3/2024, dated April 22, 2024. In April 2024, the Institute appointed a Gender Equality Officer, whose responsibilities include taking actions to promote equal treatment and equal opportunities, specifically:	**No action required** **Evidence** The IE PAS website includes a section containing the Gender Equality Plan introduced by Director's Order No. 3/2024, dated April 22, 2024, as well as information about the Gender Equality Officer, both in Polish: https://inepan.pl/wp-content/uploads/2024/06/Plan-rownosci-plci-na-lata-2024-2027_22.04.2024.pdf and English https://inepan.pl/wp-content/uploads/2024/08/Gender-Equality-Plan-at-the-Institute-of-Economics-Polish-Academy-of-Sciences.pdf

		1. Monitoring the implementation of gender equality actions defined in the Gender Equality Plan, 2. Collecting information on best equality practices and disseminating it, 3. Promoting and spreading equal treatment and anti-discrimination standards, 4. Informing about equality-related courses and trainings, 5. Serving as a consultative and contact point for discrimination issues, 6. Providing updates on the progress of equality policy implementation, 7. Providing administrative support for equality-related matters and collecting related documentation, 8. Handling employee complaints under the anti-mobbing procedure.	
11. Evaluation/ appraisal systems	+/-	Survey results show that IE PAS has a transparent system for assessing the scientific work of researchers. When asked about the transparency of scientific evaluation, 83.7% of respondents gave positive answers. However, when asked about taking into account aspects such as research results, administrative responsibilities and general scientific creativity in the evaluation system, 27% of respondents answered negatively. The evaluation criteria for scientific activities at IE PAS are governed by the Regulations for the Evaluation of Researchers of the Institute of Economics PAS, amended by Resolution No. 4	**Action 5** Develop and disseminate to employees information outlining the principles of evaluating scientific units and the principles of periodic evaluation of scientific staff **Action 10** Detailing and aligning the evaluation criteria for researchers with the requirements of the European Charter for Researchers as outlined in the Regulations for the Evaluation of Researchers of the Institute of Economics PAS **Action 10.5**

		of August 31, 2023, of the Scientific Council of IE PAS and approved on October 26, 2023, by the Vice-President of the Polish Academy of Sciences. Despite a high percentage of positive responses from employees, it should be noted that access to the evaluation criteria for researchers is currently limited.	Publishing the new Regulations for the Evaluation of Researchers of the Institute of Economics PAS on the IE PAS intranet **Action 10.6** Organizing a meeting with employees to present changes in the evaluation criteria
Recruitment and Selection			
12. Recruitment	+/-	Survey results show that most employees (86.4%) believe that IE PAS has established standards for hiring scientific staff, especially at the beginning of their careers. Similarly, 83.7% of respondents confirm the existence of open, effective, and transparent recruitment procedures for scientific positions, tailored to the type of position offered. Only 5.4% of respondents disagree with this statement, and only 10.8% are unaware of the current practices. The recruitment procedures for scientific positions at IE PAS are regulated by the Regulations on the competition procedure for the selection of candidates for academic positions at the Institute of Economics, Polish Academy of Sciences, introduced by the Scientific Council of IE PAS in 2011. However, these regulations do not address standards related to recruitment in foreign scientific institutions. Despite survey results indicating that employees perceive recruitment standards as met, there is a need to develop an OTM-R	**Action 13** Development and implementation of the "Open, Transparent, and Merit-based Recruitment Policy" (OTM-R Policy) **Action 13.1** Publishing the OTM-R Policy in both Polish and English on the IE PAS website **Action 13.2** Organizing a meeting with employees to present the OTM-R Policy **Action 14** Development of procedures and instructions related to the implementation of the OTM-R Policy **Action 14.1** Development of recruitment procedures and templates for job announcements for all positions (R1-R4)

		(Open, Transparent, Merit-based Recruitment) Policy in line with EU standards. This document will supplement the existing Regulations on the competition procedure for the selection of candidates for academic positions at the Institute of Economics, Polish Academy of Sciences.	**Action 14.2** Enhancing job descriptions to be used in the recruitment process (specifying job offers, candidate assessment, feedback for candidates on their strengths and weaknesses, and work conditions and career development at the Institute) **Action 14.3** Informing Institute employees about the launch of new competition committees (including details on committee composition) and posting this information on the intranet **Action 14.4** Developing a document (Guide for new employees joining IE PAS) about the functioning of the Institute (e.g., list of documents, introduction to administrative and research staff, and onboarding process) **Action 14.5** Creating a template for the candidate questionnaire **Action 14.6** Creating a template for the competition committee's minutes **Action 14.7** Developing a template for feedback to participants in competition procedures, including strengths and weaknesses of their applications **Action 14.8**

			Describing the appeals procedure and creating a template for appeals **Action 14.9** Developing and implementing a system for monitoring and controlling the quality of recruitment and its compliance with the OTM-R Policy **Action 14.10** Publishing all recruitment document templates on the website
13. Recruitment (Code)	-/+	Survey results indicate that a large fraction of respondents (45.9%) are unsure whether the recruitment principles at IE PAS are comparable to those in foreign institutions. The same proportion of respondents believes that IE PAS recruitment principles are similar to those in international institutions. Only 8.1% of respondents disagree with this statement. The current Regulations on the competition procedure for the selection of candidates for academic positions do not include standards related to recruitment practices in foreign research institutions. Nevertheless, IE PAS ensures adherence to international recruitment standards by appointing a competent competition committee. Candidate selection is conducted through the EURAXESS platform, the Ministry of Science and Higher Education's website, and international social media platforms.	**Action 13** Development and implementation of the "Open, Transparent, and Merit-based Recruitment Policy" (OTM-R Policy) **Action 13.3** Defining the principles for applying international standards in the recruitment process in the OTM-R Policy

14. Selection (Code)	+/-	IE PAS employees are well-informed about the composition and tasks of the competition committee, as well as gender balance, as results from the survey results. A clear majority (83.8%) of respondents believe that the selection of candidates for vacant positions is conducted in accordance with this principle. The current practices of IE PAS's management have ensured the formation of experienced competition committees demonstrating appropriate gender balance. The committee includes heads of all research units and staff at various stages of their scientific careers. Despite a high percentage of positive survey responses and good practices applied, it should be noted that there is a lack of sufficient detail regarding the operational principles of competition committees.	**Action 13** Development and implementation of the "Open, Transparent, and Merit-based Recruitment Policy" (OTM-R Policy) **Action 13.4** Defining the principles for the establishment and operation of competition committees in the OTM-R Policy **Action 13.5** Specifying powers of competition committees regarding the selection criteria for evaluating candidates for various research positions in the OTM-R Policy
15. Transparency (Code)	-/+	Survey results indicated that only a small percentage of respondents (10.8%) believe that job advertisements lack information on working conditions, the number of available positions, selection criteria, and career development prospects, and only 10.8% of respondents lack knowledge about job postings. The survey results also reveal that 45.9% of respondents are unsure whether candidates are informed about their strengths and weaknesses during the recruitment process. Additionally, 18.9% of respondents believe that candidates are not informed about their strengths and weaknesses. An analysis of previous job advertisements shows that information about working	**Action 13** Development and implementation of the "Open, Transparent, and Merit-based Recruitment Policy" (OTM-R Policy) **Action 13.6** Define in the OTM-R Policy the standards for preparing job announcements that include information on working conditions, salary levels in accordance with the applicable Regulation of the Ministry of Science and Higher Education on the minimum monthly salary, and the IE PAS remuneration regulations **Action 13.7** Specify the prospects for professional development in the OTM-R Policy **Action 13.8**

		conditions and career development prospects was not described. However, practices related to informing candidates about the strengths and weaknesses of their applications are indeed implemented at IE PAS.	Outlining the principles for informing candidates about the strengths and weaknesses of their applications in the OTM-R Policy
16. Judging merit (Code)	-/+	Almost two -third of respondents (64.8%) believe that the competencies of candidates are assessed by the competition committee both quantitatively and qualitatively. Almost one-third of respondents (32.4%) do not know how the candidate evaluation process by the competition committee proceeds. Similar responses were given by employees regarding the use of criteria beyond bibliometric indicators. The Regulations on the competition procedure for the selection of candidates for academic positions do not specify detailed non-qualitative criteria for evaluating candidates. competition committees will develop a detailed set of candidate evaluation criteria for future recruitment competitions, in line with the development goals of IE PAS.	**Action 13** Development and implementation of the "Open, Transparent, and Merit-based Recruitment Policy" (OTM-R Policy) **Action 13.5** Specifying powers of competition committees regarding the selection criteria for evaluating candidates for various research positions in the OTM-R Policy. **Action 13.9** Defining the principles for including non-scientific achievements in job announcements and during the evaluation of candidates in the OTM-R Policy **Action 13.11** Defining the principles for assessing professional qualifications, including informal ones in the OTM-R Policy
17. Variations in the chronological order of CVs (Code)	+/-	Almost one-third of respondents (32.4%) are unaware of the possibility of including information about non-scientific achievements in their applications. Analysis of previous job announcements (available on websites/scientific portals) indicates that information is provided about the possibility of attaching additional	**Action 13** Development and implementation of the "Open, Transparent, and Merit-based Recruitment Policy" (OTM-R Policy) **Action 13.9** Defining the principles for considering non-scientific

		documents confirming achievements and competencies, including non-scientific ones. In practice, competition committees also consider candidates' non-scientific achievements.	achievements in job advertisements and during the evaluation of candidates in the OTM-R Policy **Action 13.11** Defining the principles for evaluating professional qualifications, including informal qualifications in the OTM-R Policy
18. Recognition of mobility experience (Code)	-/+	A significant fraction of respondents (35.1%) are unsure whether professional mobility is used as a criterion for evaluating candidates. However, the majority of respondents (59.4%) believe that experiences related to mobility are considered as a criterion in assessing a candidate's scientific development. Many IE PAS researchers are simultaneously involved in both national and international scientific institutions as well as in international research teams, which confirms that professional mobility is recognized in the evaluation of candidates.	**Action 13** Development and implementation of the "Open, Transparent, and Merit-based Recruitment Policy" (OTM-R Policy) **Action 13.9** Defining the principles for considering non-scientific achievements in job advertisements and during the evaluation of candidates in the OTM-R Policy **Action 13.10** Specifying criteria for assessing candidates' mobility in the OTM-R Policy
19. Recognition of qualifications (Code)	-/+	A significant percentage (40.5%) of respondents lack knowledge about how professional and informal qualifications are evaluated by the competition committee. Existing practices of the competition committee confirm that informal qualifications are also assessed.	**Action 13** Development and implementation of the "Open, Transparent, and Merit-based Recruitment Policy" (OTM-R Policy) **Action 13.11** Defining the principles for evaluating professional qualifications, including informal ones in the OTM-R Policy
20. Seniority (Code)	+/-	Only 13.5% of surveyed respondents indicate that they are unsure whether the level of	**Action 14**

		qualifications required for research positions matches the needs of these positions at IE PAS. The vast majority of respondents (86.5%) agree with this statement. The Regulations on the competition procedure for the selection of candidates for academic positions includes the required qualifications for various research positions at IE PAS. Despite a high percentage of positive responses from employees, it is important to note the lack of detailed recruitment procedures and templates for job announcements for all positions (R1-R4).	Development of procedures and instructions related to the implementation of the OTM-R policy **Action 14.1** Development of recruitment procedures and templates for job announcements for all positions (R1-R4) **Action 14.2** Enhancing job descriptions to be used in the recruitment process (specifying job offers, candidate assessment, feedback for candidates on their strengths and weaknesses, and work conditions and career development at the Institute)
21. Postdoctoral appointments (Code)	+/-	Most respondents (78.4%) believe that individuals with a doctoral degree are encouraged to pursue further academic degrees and titles. However, 16.2% of respondents are not aware of this. At IE PAS, there is neither a document addressing career development paths, nor recommendations regarding the involvement of postdoctoral researchers in research projects.	**Action 14** Development of procedures and instructions related to the implementation of the OTM-R Policy **Action 14.1** Development of recruitment procedures and templates for job advertisements for all positions (R1-R4) **Action 14.2** Enhancing job descriptions to be used in the recruitment process (specifying job offers, candidate assessment, feedback for candidates on their strengths and weaknesses, and work conditions and career development at the Institute) **Action 15**

			Development and implementation of career development paths for researchers at all career stages **Action 15.1** Incorporating information regarding the support provided by academic supervisors to junior researchers, including support related to participating in and obtaining externally funded research projects in the career development path **Action 15.2** Incorporating description of provisions/information regarding support for researchers in obtaining additional academic degrees in the career development path **Action 15.3** Making the career development path description for researchers at all career stages available on the intranet **Action 15.4** Including recommendations for involving postdoctoral researchers in research projects in the Regulations for the implementation of research projects introduced by the Director's order of September 17, 2015
Working Conditions and Social Security			
22. Recognition of the profession	+/+	According to survey results, 95% of respondents believe that IE PAS, as an employer, acknowledges the knowledge and experience of researchers and treats them accordingly.	**No action required** **Proof** The Regulations for the implementation of research projects

		Employee responsibilities are outlined in the task sheet, which is an annex to the employment contract and varies depending on the position held, including scientific, research-technical, and administrative roles. The Institute has its Regulations for the implementation of research projects introduced by the Director's order of September 17, 2015, which specifies the scope of administrative support offered to research staff in the implementation of projects.	introduced by the Director's order of September 17, 2015 can be found in the employees' section of the IE PAS website: https://inepan.pl/wp-content/uploads/2024/07/Regulamin-realizacji-projektow_17.09.2015.pdf
23. Research environment	+/+	According to the survey results, 83.7% of respondents believe that IE PAS, to the best of its ability, ensures a stimulating scientific environment by providing appropriate equipment, facilities, and opportunities, including remote collaboration. There is the Remote work regulations introduced by Order No. 8/2023 of the Director of the Institute of Economics, Polish Academy of Sciences of April 25, 2023. The Institute provides employees with licenses for software that enable remote teamwork, remote access to scientific databases, including journal databases and data repositories. Most seminars and meetings are held in a hybrid or remote format to ensure the broadest possible participation of employees. Annually, a research support fund is established, which finances conference travels, participation in training, and software necessary for conducting scientific research.	**No action required** **Evidence:** The Remote work regulations introduced by Order No. 8/2023 of the Director of the Institute of Economics, Polish Academy of Sciences of April 25, 2023: https://inepan.pl/wp-content/uploads/2024/07/Regulamin-pracy-zdalnej_17.10.2023.pdf
24. Working conditions	+/+	The survey results suggest that IE PAS provides flexible working conditions that allow	**No action required**

		researchers to balance their family life and professional life. A total of 100% of respondents answered either "definitely yes" or "probably yes." There is the Remote work regulations introduced by Order No. 8/2023 of the Director of the Institute of Economics, Polish Academy of Sciences of April 25, 2023, which provides for flexible working conditions for researchers.	**Evidence:** Remote work regulations introduced by Order No. 8/2023 of the Director of the Institute of Economics, Polish Academy of Sciences of April 25, 2023: https://inepan.pl/wp-content/uploads/2024/07/Regulamin-pracy-zdalnej_17.10.2023.pdf
25. Stability and permanence of employment	+/+	According to the employees, IE PAS provides job security for its researchers. A total of 94.6% of respondents gave positive answers. Employees of the Institute are employed under employment contracts regulated by the Labor Code and the Act of April 30, 2010, on the Polish Academy of Sciences.	**No action required** **Evidence** Regulations related to employment matters are available on the intranet: https://inepan.pl/dla-pracownika/regulaminy-i-przepisy-wewnetrzne/
26. Funding and salaries	+/+	Majority of respondents (86.5%) believe that, according to existing regulations, IE PAS provides fair compensation conditions for researchers, including social security benefits. At IE PAS, the Remuneration regulations and the Regulations on the employment and remuneration of persons participating in the implementation of projects at IE PAS of September 24, 2015 are in effect. The minimum level of researchers salaries is set by the Ministry of Science and Higher Education through regulation. The possibility of obtaining salaries above the minimum level depends on the size of the subsidy granted to the Institute and the scientific activity of the researchers.	**No action required** **Evidence:** Remuneration regulations: https://inepan.pl/wp-content/uploads/2024/07/Regulamin-wynagradzania_28.05.2024.pdf and the Regulations on the employment and remuneration of persons participating in the implementation of projects at IE PAS of September 24, 2015: https://inepan.pl/wp-content/uploads/2024/07/Regulamin-zatrudniania-i-wynagradzania-w-projektach_24.09.2015.pdf
27. Gender balance	+/+	Survey results have shown that IE PAS is committed to ensuring representative gender	**No action required**

		balance at every level of management. A total of 86.5% of respondents provided positive responses. On April 22, 2024, IE PAS introduced the Gender Equality Plan, and information about this was communicated to the Institute's employees. The Institute has appointed a Gender Equality Officer.	**Proof:** Publication of the Gender Equality Plan on the Institute's website: https://inepan.pl/wp-content/uploads/2024/06/Plan-rownosci-plci-na-lata-2024-2027_22.04.2024.pdf
28. Career development	-/-	The survey revealed that employees of IE PAS have doubts about whether the Institute has a developed career development strategy for researchers. A total of 62.1% of respondents provided negative or inconclusive answers. There is no single document outlining career development pathways for researchers.	**Action 15** Development and implementation of career development pathways for research staff at all career stages **Action 15.1** Incorporating information regarding the support provided by academic supervisors to junior researchers, including support related to participating in and obtaining externally funded research projects in the career development path **Action 15.2** Incorporating description of provisions/information regarding support for researchers in obtaining additional academic degrees in the career development path **Action 15.3** Making the career development path description for researchers at all career stages available on the intranet
29. Value of mobility	+/-	Survey results indicate that IE PAS generally appreciates mobility (including geographical, intersectoral, interdisciplinary, and virtual	**Action 10** Detailing and aligning the evaluation criteria for researchers with

		mobility) for scientific development. A total of 72.9% of respondents gave positive answers. At the same time, a significant percentage of respondents (21.6%) declared a lack of knowledge in this area, with 5.4% giving a negative answer. The Institute supports mobility. IE PAS has a fund for supporting research units, which can finance, among other things, travels to scientific conferences both domestic and international, internships, and research visits. The amount of funds allocated to individual units depends on the quantity and quality of the scientific publications in a given unit. Mobility is also one of the elements of the periodic evaluation of researchers. Many researchers of IE PAS collaborate with other academic centers and business entities. The Institute supports researchers in applying for mobility funding through grant competitions. Despite a very low percentage of individuals who negatively assess the appreciation of mobility at IE PAS, indicating the existence of good practices in this area, it is necessary to address a lack of precise criteria for considering mobility in the evaluation of researchers.	the requirements of the European Charter for Researchers as outlined in the Regulations for the Evaluation of Researchers of the Institute of Economics PAS **Action 10.1** Including mobility in the Regulations for the evaluation of researchers of the Institute of Economics PAS **Action 10.3** Informing employees about the forms of mobility support offered by IE PAS during staff meetings **Action 10.4** Posting links to current Polish National Agency for Academic Exchange (NAWA) offers and Office of International Cooperation PAS offers, which are usually received by the Scientific Department and any other entities supporting researchers mobility on the intranet **Action 10.5** Publishing the new Regulations for the Evaluation of Researchers of the Institute of Economics PAS on the IE PAS intranet **Action 10.6** Organizing a meeting with employees to present changes in the evaluation criteria
30. Access to career advice	-/+	Survey results reveal that IE PAS employees have doubts about the extent of support provided by the Institute for planning their career development paths. While 64.8% of	**Action 15** Development and implementation of career development pathways for researchers at all career stages

		respondents recognize such support, a relatively large percentage of respondents either report a lack of such support (10.8%) or a lack of knowledge on the matter (24.3%). The management of IE PAS, on various occasions (such as the beginning of evaluation periods, periodic assessments, etc.), formulates recommendations regarding the expected actions from employees. However, there is a lack of more long-term support for individual career planning.	**Action 15.1** Incorporating information regarding the support provided by academic supervisors to junior researchers, including support related to participating in and obtaining externally funded research projects in the career development path **Action 15.2** Incorporating description of provisions/information regarding support for researchers in obtaining additional academic degrees in the career development path **Action 15.3** Making the career development path description for researchers at all career stages available on the intranet **Action 16** Developing a list of training programs for employees at various stages of their career development **Action 16.1** Identifying training needs **Action 16.2** Offering training programs for employees on preparing research grant proposals **Action 16.3**

			Developing a list of training programs and publishing it on the intranet **Action 16.4** Regular mailing to the IE PAS employees with training proposals
31. Intellectual Property Rights	+/-	Survey results show that IE PAS employees tend to believe that through legal protection, such as that provided in the Regulations on the management of copyright and related rights, industrial property rights and the principles of commercialization of the results of scientific research and development work at IE PAS, IE PAS ensures benefits for researchers from conducting and publishing scientific results. A total of 72.9% of respondents gave positive responses. However, 24.3% of respondents declared a lack of knowledge on this matter. IE PAS follows the Regulations on the management of copyright and related rights, industrial property rights and the principles of commercialization of the results of scientific research and development work at IE PAS, which provide protection for intellectual property rights. However, these regulations are not sufficiently well-known among employees. Additionally, it should be noted that the aforementioned Regulations have been in force since 2015 and therefore require updating.	**Action 2** Updating and disseminating the Regulations on the management of copyright and related rights, industrial property rights and the principles of commercialization of the results of scientific research and development work at IE PAS
32. Co-authorship	+/-	Survey results indicate that IE PAS employees tend to believe that the existing procedures at IE PAS provide researchers with the	**Action 11** Development and dissemination of information for employees

		opportunity to exercise their right to acknowledgment of the actual contributions of co-authors or the right to publish their research results independently of their supervisors. Positive responses were given by 67.5% of respondents. However, 29.7% of respondents reported a lack of knowledge in this area. The document regulating the principles of co-authorship in scientific work at PAS institutes is the Code of Ethics for Researchers introduced by Resolution No. 2/2020 of the General Assembly of the Polish Academy of Sciences of June 25, 2020. However, these regulations are not sufficiently well-known among employees.	containing a selection of issues from the Code of Ethics for Researchers introduced by Resolution No. 2/2020 of the General Assembly of the Polish Academy of Sciences of June 25, 2020
33. Teaching	-/-	Survey results show that employees at IE PAS have doubts about whether teaching is viewed as a valuable opportunity for the professional development of researchers at IE PAS. Although the majority of surveyed respondents (54%) provided positive responses, a significant fraction of respondents have an opposing view (24.3%) or declare a lack of knowledge in this area (21.6%). Teaching is not a mandatory requirement for researchers at IE PAS; however, it is recognized as a valuable opportunity for professional development. It should be noted that there is a lack of clarity regarding the treatment of teaching in the evaluation of researchers.	**Action 5** Develop and disseminate to employees information outlining the principles of evaluating scientific units and the principles of periodic evaluation of researchers **Action 10** Detailing and aligning the evaluation criteria for researchers with the requirements of the European Charter for Researchers as outlined in the Regulations for the evaluation of Researchers of the Institute of Economics PAS **Action 10.2** Including teaching in the Regulations for the Evaluation of Researchers of the Institute of Economics PAS **Action 10.5**

			Publishing the new Regulations for the Evaluation of Researchers of the Institute of Economics PAS on the IE PAS intranet **Action 10.6** Organizing a meeting with employees to present changes in the evaluation criteria
34. Complains/appeals	-/+	The survey results show that IE PAS employees have doubts whether the Institute has procedures ensuring impartiality in considering complaints and confidential and informal assistance in resolving conflicts. Even if the majority of surveyed respondents (64.8%) give positive answers, a significant number of respondents declare a lack of knowledge in this area (29.7%). Appropriate procedures for complaints and conflict resolution have already been implemented. IE PAS has a disciplinary spokesman appointed by the Resolution of the Scientific Council of IE PAS on March 30, 2023, and the Anti-mobbing procedure of June 25, 2015 is in force. In April 2024, after the survey was conducted, the Gender Equality Officer was appointed at the Institute. The officer's responsibilities include taking action for equal treatment and equal opportunities, in particular: 1) monitoring the implementation of equality activities specified in the Gender Equality Plan, 2) collecting information on good equality practices and disseminating them,	**Action 12** Updating and disseminating procedures ensuring impartiality in handling complaints and confidential, informal conflict resolution **Action 12.1** Developing a document that clearly explains to employees the procedures ensuring impartiality in handling complaints and providing confidential, informal conflict resolution assistance **Action 12.2** Posting information about procedures ensuring impartiality in handling complaints and providing confidential, informal conflict resolution assistance on the intranet

		3) promoting and disseminating equal treatment and anti-discrimination standards, 4) information about equality courses and training, 5) acting as a consultation and contact point in matters of discrimination, 6) reporting on progress in the implementation of equality policy, 7) providing administrative support for equality-related matters and collecting documentation on these issues, 8) accepting complaints from employees as part of the anti-mobbing procedure.	
35. Participation in decision-making bodies	+/+	Survey findings indicate that IE PAS employees are inclined to acknowledge that researchers have representatives in the information, consultative, and decision-making bodies of IE PAS. Positive responses were given by 81.1% of respondents. At the same time, 16.2% of respondents declared a lack of knowledge in this area. Researchers at various stages of their careers have representatives in the Scientific Council of IE PAS (according to the Scientific Council Regulation of IE PAS) and in various committees established by the IE PAS Management to address key issues related to the functioning of IE PAS (recruitment, periodic evaluation, etc.). Information on this can be found in IE PAS's annual scientific activity reports. During the meeting on April 4, 2023, employees elected their representatives who consult on the most important regulations within the institute.	**No action required** **Proof** Composition of the Scientific Council with affiliations: https://inepan.pl/rada-naukowa/ Employee Representatives: https://inepan.pl/dla-pracownika/przedstawiciele-pracownikow/ Composition of the Scientific Council Committees: https://inepan.pl/wp-content/uploads/2024/07/Komisja-nostryfikacyjna_30.03.23.pdf Composition of the Social Fund Committee: https://inepan.pl/wp-content/uploads/2024/07/Komisja-ZFSS_27.10.2022.pdf

Training and Development			
36. Relation with supervisors	+/-	Survey results show that the relationships between early-career researchers and their scientific mentors at IE PAS are sufficiently broad and cover areas such as monitoring research progress and results, receiving feedback through seminars, and working according to established schedules. According to IE PAS employees, experienced researchers are actively involved in the research development of young researchers, as indicated by 82.7% of respondents. Due to a relatively small size of the Institute and its diverse research staff, young researchers have frequent and direct contact with more experienced researchers. This positively impacts the development of scientific relationships, knowledge transfer, and the undertaking of joint research projects, where senior researchers play roles as leaders, mentors, and advisors. Despite the high percentage of positive responses from employees and the use of good practices, it should be noted that there is a lack of sufficient detail regarding the scope and principles of support provided to younger researchers by their research supervisors	**Action 15** Development and implementation of career development paths for researchers at all career stages **Action 15.1** Incorporating information regarding the support provided by academic supervisors to junior researchers, including support related to participating in and obtaining externally funded research projects in the career development path **Action 15.2** Incorporating description of provisions/information regarding support for researchers in obtaining additional academic degrees in the career development path **Action 15.3** Making the career development path description for researchers at all career stages available on the intranet
37. Supervision and managerial duties	+/-	Survey results show that employees at IE PAS build constructive and positive relationships with early-career researchers. Positive responses were given by 72.9% of respondents. According to the practices followed at the Institute, young researchers have the opportunity to participate in grant projects led	**Action 15** Developing and implementing a description of career development paths for researchers at all career stages **Action 15.1**

		by experienced researchers. Additionally, young researchers actively contribute to the statutory work of IE PAS. The quality and timeliness of statutory work are monitored by research team leaders. Young researchers also have the chance to present their research results at the Institute's scientific seminars, gaining valuable presentation skills and receiving constructive feedback. However, IE PAS lacks formal regulations regarding the support provided to junior researchers by their mentors. Despite the high percentage of positive responses and the application of good practices, there is a noted lack of detailed specification regarding the scope and principles of support provided to junior researchers by their mentors.	Incorporating information regarding the support provided by academic supervisors to junior researchers, including support related to participating in and obtaining externally funded research projects in the career development path **Action 15.2** Incorporating description of provisions/information regarding support for researchers in obtaining additional academic degrees in the career development path **Action 15.3** Making the career development path description for researchers at all career stages available on the intranet
38. Continuing Professional Development	+/-	Survey results show that respondents recognize the support provided by IE PAS for obtaining further academic degrees (86.4%). Only 8.1% of respondents indicated a lack of such support. Despite a high percentage of positive responses from employees and the use of good practices, it should be noted that IE PAS lacks formal regulations regarding support for obtaining further academic degrees.	**Action 15** Development and implementation of career development paths for researchers at all career stages **Action 15.1** Incorporating information regarding the support provided by academic supervisors to junior researchers, including support related to participating in and obtaining externally funded research projects in the career development path **Action 15.2** Incorporating description of provisions/information regarding support for researchers in obtaining additional academic degrees in the career development path

			Action 15.3 Making the career development path description for researchers at all career stages available on the intranet
39. Access to research training and continuous development	+/-	Survey results show that employees at IE PAS have opportunities for professional development and increasing their job prospects through access to resources that enable continuous skill development, such as participation in training, conferences, internships, and research stays (89.2% responses). Researchers at IE PAS participate in international scientific conferences, workshops, and collaborate with renowned foreign research institutions. Funding for these activities primarily comes from external sources. A significant limitation is a relatively small budget for conferences and training provided by IE PAS from its own resources through the support fund for research departments. Despite a high percentage of positive responses from employees, it should be noted that employees do not have guaranteed, consistent access to specialized training offers at various stages of career development provided by IE PAS.	**Action 16** Developing a list of training programs for employees at various stages of their career development **Action 16.1** Identifying training needs **Action 16.2** Offering training programs for employees on preparing research grant proposals **Action 16.3** Developing a list of training programs and publishing it on the intranet **Action 16.4** Regular mailing to the IE PAS employees with training proposals
40. Supervision	+/-	Survey results show that early-career researchers at IE PAS have access to best practices, experiences, and support from other scientists. This was affirmed by 86.4% of respondents. Despite a high percentage of	**Action 15** Development and implementation of career development paths for researchers at all career stages **Action 15.1**

		positive responses, it should be noted that IE PAS lacks formal legal regulations concerning the support of junior researchers by their mentors.	Incorporating information regarding the support provided by academic supervisors to junior researchers, including support related to participating in and obtaining externally funded research projects in the career development path **Action 15.2** Incorporating description of provisions/information regarding support for researchers in obtaining additional academic degrees in the career development path **Action 15.3** Making the career development path description for researchers at all career stages available on the intranet

Annex No. 2 Open, Transparent and Merit-Based Recruitment (OTM-R) Checklist

OTM-R checklist for organisations					
	Open	**Transparent**	**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	-- no	The document defining the procedure for conducting competitions for academic positions at IE PAS is titled "Regulations on the competition procedure for the selection of candidates for academic positions at the Institute of Economics, Polish Academy of Sciences" and was adopted by the Scientific Council of IE PAS on October 20, 2011. Other legal acts according to which recruitment for academic positions at IE PAS takes place are the following: 1 .The Act of April 30, 2010, on the Polish Academy of Sciences. https://isap.sejm.gov.pl/isap.nsf/download.xsp/WDU20100960619/U/D20100619Lj.pdf 2. The Act of July 20, 2018, Law on Higher Education and Science. https://isap.sejm.gov.pl/isap.nsf/download.xsp/WDU20180001668/U/D20181668Lj.pdf 3. The Act of June 26, 1974, the Labor Code https://isap.sejm.gov.pl/isap.nsf/download.xsp/WDU19740240141/U/D19740141Lj.pdf The above regulations have not been published on the IE PAS website.
2. Do we have an internal guide setting out clear OTM-R procedures and practices for all types of positions?	x	x	x	-/+ yes, partially	The function of an internal guide to the recruitment procedures and practices used at IE PAS is currently fulfilled by the aforementioned “Regulations on the competition procedure for the selection of candidates for academic positions at the Institute of Economics, Polish Academy of Sciences”. However, this regulation is not published on the IE PAS website and does

					not encompass all the principles that should be included in OTM-R. The Institute should develop a separate OTM-R Policy document that provides a much broader perspective on the recruitment and personnel policies.
3. Is everyone involved in the process sufficiently trained in the area of OTM-R?	x	x	x	-/+ yes, partially	The guidelines for the conduct of recruitment processes are contained in the "Regulations on the competition procedure for the selection of candidates for academic positions at the Institute of Economics, Polish Academy of Sciences". These regulations are made available to all the members of the Competition Committees. Members of the Competition Committees are appointed by the Director of IE PAS from among the most experienced and competent employees of the Institute, of various genders and at different stages of career development (Ph.D., Ph.D. with habilitation, and professor), who are familiar with and respect the recruitment procedures in force at IE PAS. No additional training sessions have been conducted.
4. Do we make (sufficient) use of e-recruitment tools?	x	x		++ yes, completely	IE PAS utilizes the following tools in its recruitment process: 1. EURAXESS, https://euraxess.ec.europa.eu/jobs 2. Academic Job Portal of the Ministry of Science and Higher Education, https://bazaogloszen.nauka.gov.pl/ 3. IE PAS website, https://inepan.pl/ 4. Social media – LinkedIn, https://pl.linkedin.com/school/instytut-nauk-ekonomicznych-polskiej-akademii-nauk/ 5. Public Information Bulletin, https://inepan.bip.gov.pl/ IE PAS is able to conduct qualification interviews via online platforms such as MS Teams. Candidates, including those from abroad, do not need to present original diplomas during the recruitment process, and the qualification interviews can be conducted online. The required presentation of previous research results and plans for scientific activity at seminars at IE PAS can also take place online.
5. Do we have a quality control system for OTM-R in place?	x	x	x	-/+ yes, partially	At IE PAS, the Director appoints the Competition Committees to ensure the correctness of the recruitment process. The rules and requirements for conducting competitions are formulated in a

					clear and transparent manner, and selected candidates are presented to the Scientific Council of IE PAS for evaluation. Currently, there is no formalized quality assessment system in place for the recruitment practices used.
6. Does our current OTM-R policy encourage external candidates to apply?	x	x	x	++ yes, completely	Current IE PAS employment policy encourages scientists from diverse backgrounds to apply. All announcements are published in Polish and English on the Ministry of Science and Higher Education portal, EURAXESS, BIP (Public Information Bulletin), as well as on the Institute's website and social media channels. This ensures that information about job openings reaches all potentially interested candidates. Job announcements contain comprehensive information about the positions offered, including precisely formulated requirements for candidates, a list of necessary documents to submit, application deadlines, and the expected start date of the employment. The number of applicants applying for positions has been increasing in recent years.
7. Is our current OTM-R policy in line with policies to attract researchers from abroad?	x	x	x	++ yes, completely	The current policy at IE PAS attracts scientists from abroad. There is an increasing interest in both job opportunities for scientific positions and the possibilities for internships or research projects at IE PAS. The interest in research internships at IE PAS under the PASIFIC project was very high, with 13 applications submitted across two competition editions. Additionally, there was significant interest in all the support programs for the Ukrainian citizens. This confirms that the offerings of IE PAS are reaching international scientists.
8. Is our current OTM-R policy in line with policies to attract underrepresented groups?	x	x	x	++ yes, completely	The Institute makes every effort to ensure that potential candidates and employees are not discriminated against in any way. Unfortunately, the Staszic Palace, where the Institute is located, is not adapted to the needs of people with mobility impairments. However, the Institute provides workspaces for scientists in another location, i.e., at the Palace of Culture and Science, which is accessible for individuals with mobility impairments. Meetings, institute seminars, and sessions of the Scientific Council of IE PAS also take place there. A part of administrative staff members also work there. Additionally, the

					Institute is flexible in enabling remote work for its employees[1]. The content on the Institute's website is available in both Polish and English to ensure accessibility to a wide audience. Facilities for visually impaired individuals, such as the ability to magnify text or underline links, have been applied on the website. IE PAS is also currently implementing a Gender Equality Plan aimed at ensuring balanced gender representation and combating gender discrimination in the recruitment processes.
9. Is our current OTM-R policy in line with policies to provide attractive working conditions for researchers?	x	x	x	++ yes, completely	IE PAS strives to provide attractive working conditions within its financial capabilities. The minimum wage levels for research staff are determined nationally by the Act of April 30, 2010, on the Polish Academy of Sciences (Art. 91a). The Institute's ability to offer wages above these minimum levels largely depends on the amount of subsidy granted, which at the same time is largely beyond its control. Currently, the level of funding is not satisfactory. However, scientific employees receive motivational bonuses, and administrative staff earnings are above the minimum levels. Opportunities and conditions for obtaining academic degrees and titles are directly regulated by the Act of July 20, 2018, Law on Higher Education and Science. All essential documents governing work at the Institute are regularly updated to comply with current regulations. Employees of the Institute are covered by the IE PAS Social Benefits Fund, which provides subsidies for summer and winter holidays, Multisport cards, and additional monetary benefits for holidays. Employees facing personal difficulties or financial problems have the option to receive the financial aid. The Institute also subsidizes medical care and offers favorable housing loans. Additionally, IE PAS ensures opportunities for professional development and skills enhancement through the access to training programs. It supports research staff in participating in internships at international research centers and assists them in applying for and executing projects in close collaboration with foreign scientific institutions.

[1] Remote Work Regulations at the Institute of Economics, Polish Academy of Sciences, introduced by Order No. 8/2023 of the Director of the Institute of Economic Sciences PAS.

10. Do we have means to monitor whether the most suitable researchers apply?				-/+ yes, partially	Posting announcements on the EURAXESS portal, in the Academic Job Portal of the Ministry of Science and Higher Education, on the IE PAS website, on social media, and in the Public Information Bulletin, along with precisely formulated requirements regarding qualifications and scientific achievements for candidates, increases the likelihood that applications will be submitted by the most qualified researchers. Individuals who do not meet the requirements specified in the announcements are not allowed to proceed to further stages of the competition. No additional dedicated tools are used to verify whether the most suitable researchers apply.
Advertising and application phase					
11. Do we have clear guidelines or templates (e.g., EURAXESS) for advertising positions?	x	x		+/-yes, substantially	EURAXESS and the Ministry of Science and Higher Education have their own job announcement form templates. At IE PAS, there is no strictly defined form for posting job offers, but the announcements include all the necessary information, including the type of position, required qualifications, list of documents to be submitted, deadlines, application submission methods, and privacy protection clauses.
12. Do we include in the job advertisement references/links to all the elements foreseen in the relevant section of the toolkit?	x	x		-/+ yes, partially	Essentially, all key information required according to the Regulations on the competition procedure for the selection of candidates for academic positions at the Institute of Economics, Polish Academy of Sciences is published (see point 11). However, it should be noted that all the new elements outlined in the OTM-R policy should be included when creating the job announcement template. The template should contain a detailed scope of information that should be included in the announcements and a brief description of the Institute as the employer.
13. Do we make full use of EURAXESS to ensure our research vacancies reach a wider audience?	x	x		++ yes, completely	The Institute fully utilizes the opportunities provided by EURAXESS to attract the best candidates both domestically and internationally. By doing so, IE PAS complies with Article 91, paragraph 5 of the Act on the Polish Academy of Sciences, which mandates the posting of job announcements "on the European Commission's websites[2]."

[2] Act of April 30, 2010, on the Polish Academy of Sciences, Journal of Laws of 2020, item 1796.

14. Do we make use of other job advertising tools?	x	x		++ yes, completely	Publishing job announcements on the website of the Ministry of Science and Higher Education and in the Public Information Bulletin is mandated by the aforementioned Act on the Polish Academy of Sciences. Additionally, IE PAS publishes job announcements on its own website and on social media platforms such as LinkedIn.
15. Do we keep the administrative burden to a minimum for the candidate?	x			++ yes, completely	IE PAS ensures that job applicants are required to provide only the essential documents needed for the recruitment process. Each job announcement includes a list of necessary documents. Applications, along with the required documents, must be submitted electronically to the specified email address and in the paper form either in person at the IE PAS headquarters or via mail. Candidates are required to present the original documents only once they have been selected.
Selection and evaluation phase					
16. Do we have clear rules governing the appointment of selection committees?		x	x	+/-yes, substantially	The rules for appointing competition committees are regulated by the Regulations on the competition procedure for the selection of candidates for academic positions at the Institute of Economics, Polish Academy of Sciences. According to this regulation, the Competition Committee is appointed by the Director of IE PAS. Its composition is selected in accordance with the specific aims of each competition to ensure the most objective and substantive evaluation of the submitted competition documentation, thereby selecting the best candidate.
17. Do we have clear rules concerning the composition of selection committees?		x	x	+/-yes, substantially	According to the Regulations on the competition procedure for the selection of candidates for academic positions at the Institute of Economics, Polish Academy of Sciences, the Competition Committee comprises no fewer than three research staff members of the Institute. The members of the Committee have the appropriate professional experience, qualifications, and competencies to evaluate the candidates.
18. Are the committees sufficiently gender-balanced?		x	x	-/+ yes, partially	Currently, there is no clear regulation regarding gender equality in competition committees. However, the IE PAS Director makes efforts to ensure a balanced participation of men and women when appointing the Competition Committee. In the

					committees appointed so far, representation of both genders has been maintained at various stages of professional development. Work is underway to implement a Gender Equality Plan, which aims to introduce principles to increase balanced gender representation in competition committees.
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	-/+ yes, partially	According to the Regulations on the competition procedure for the selection of candidates for academic positions at the Institute of Economics, Polish Academy of Sciences , the Director of the Institute, in consultation with the Competition Committee, decides to announce a competition, specifying the required qualifications along with a list of documents confirming those qualifications, as well as additional requirements and the methods of documenting them. IE PAS has not yet implemented a score-based system for comparing candidates. Each decision is made based on the expert assessment and a detailed discussion by the members of the Competition Committee. The recruitment process at IE PAS is divided into the following stages: 1. Submission of documents by candidates. 2. Formal assessment of submitted applications and admission of candidates to respective competitions. 3. Presentation of candidates' achievements and research plans at a workshop seminar at IE PAS. 4. Substantive evaluation of candidates and the Competition Committee decision to recommend selected candidates for the review by the Scientific Council of IE PAS. 5. Review of candidates for scientific positions by the Scientific Council of the Institute. 6. Decision of the Competition Committee on the final list of candidates recommended for employment to the Director of IE PAS.
Appointment phase					

20. Do we inform all applicants at the end of the selection process?		x		++ yes, completely	All candidates participating in the recruitment process receive feedback so that no application goes unanswered. After the competition concludes, a protocol is prepared containing information about the proceedings of the Competition Committee, the method of selecting the candidate for employment, the total number of applications received, and the final outcome. Candidates recommended for employment are informed about the competition results via email.
21. Do we provide adequate feedback to interviewees?		x		-/+ yes, partially	Candidates are primarily informed about the results of the recruitment process via email. This communication includes the rationale behind the decision made. However, candidates do not receive more detailed information regarding the strengths and weaknesses of their applications.
22. Do we have an appropriate complaints mechanism in place?		x		-/+ yes, partially	According to the Regulations on the competition procedure for the selection of candidates for academic positions at the Institute of Economics, Polish Academy of Sciences, all candidates participating in the recruitment process receive feedback on the decision made by the Competition Committee along with the justification. The Regulation ensures that every application receives a response. Each candidate is informed about the decision of the Competition Committee. Procedures for filing appeals have not been separately described. Any appeals, if raised, will be considered on an individual basis.
Overall assessment					
23. Do we have a system in place to assess whether OTM-R delivers on its objectives?				-/+ yes, partially	The Department of Human Resources and General Affairs of IE PAS continuously monitors the implementation of provisions outlined in the Regulations on the competition procedure for the selection of candidates for academic positions at the Institute of Economics, Polish Academy of Sciences. According to Article 96 of the Act on the Polish Academy of Sciences, "scientific employees are subject to periodic evaluations conducted by the Scientific Council, covering the results of their work, not less than once every 4 years[3]." Therefore, the quality

[3] The Act of April 30, 2010, on the Polish Academy of Sciences, Journal of Laws of 2020, item 1796.

					of the recruitment policy is also assessed based on the scientific achievements and work quality of newly hired employees. As of now, an additional system specifically for evaluating the implementation of provisions outlined in OTM-R has not been implemented.