

CoARA ACTION PLAN 2024-2027

BIOGIPUZKOA HEALTH RESEARCH INSTITUTE – BIOGIPUZKOA HRI



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CoARA: THE AGREEMENT ON REFORMING RESEARCH ASSESSMENT

The strategy and actions of the Biogipuzkoa Health Research Institute (onwards Biogipuzkoa) aimed at developing open and transparent research that responds to social needs, share the vision and objectives of many initiatives meant for reforming research evaluation practices.

In this context, Biogipuzkoa is committed to ensuring that the evaluation of research, researchers and research organisations recognise the diverse results, practices and activities that maximise the quality and impact of research. To incorporate best practices in this regard, the Institute has signed the **‘Coalition for Research Assessment, CoARA’** agreement, which was drafted in early 2022 by a team composed of representatives from the European University Association (EUA), Science Europe, the European Commission and Dr. Karen Stroobants, in her individual capacity as a consultant. EU Member States and Associated Countries have been consulted on the agreement in the framework of the ERA Forum and the European Research Area Committee (ERAC).

According to the agreement, the evaluation of research covers:

- The evaluation of research performing organisations.
- Evaluation of research projects.
- The evaluation of individual researchers and research teams.

CoARA, through this Agreement, sets a common direction for the reform of research evaluation while respecting the autonomy of each organisation. It proposes to achieve the reform of the evaluation of scientific activity, with a global scope, through a Coalition of organisations including Biogipuzkoa. The organisations that compose this coalition work to facilitate the exchange of information, good practices and mutual learning between centres and institutions committed to this objective.

To this end, Biogipuzkoa agrees with the following (10) commitments proposed in the Agreement:

Core Commitments

Recognising the diversity of scientific contributions: teaching, leadership, supervision, training and mentoring.

Basing evaluation primarily on qualitative assessment: peer review supported by the responsible use of quantitative indicators.

Leave behind the inappropriate use of journal and publication based metrics, in particular the Journal Impact Factor (JIF) and the h-index.

Avoid the use of rankings.

Support Commitments

Commit resources from evaluation authorities for this to be performed

Review, adapt and develop criteria among all actors at two levels: (i) institutions and (ii) projects and researchers.

Raise awareness and communicate in a transparent manner the criteria, tools and processes being used.

Exchange practices and experiences.

Communicate progress in compliance.

Open publishly good practices to gather evidence.

In order to start implementing this reform, Biogipuzkoa is devoted to updating its internal evaluation processes.

Evaluation of research at Biogipuzkoa

Within the reform of research evaluation, Biogipuzkoa has made progress in the reflection on what would be the optimal evaluation model for its research lines, and it is hoped that throughout the development of this plan sufficient evidence will be generated for its possible implementation.

Action Plan 2024-2027

Premises for the construction of the plan

The CoARA Action Plan of Biogipuzkoa 2024-2027 is structured under the following fundamental premises:

- **Commitment to the CoARA principles:** to promote evaluation based primarily on qualitative reviews, supported by the responsible use of quantitative indicators. IIS Biogipuzkoa is committed to adopting a holistic view in the evaluation, considering individual and collective achievements in various contexts, from technological innovation to open science.
- **Diversity of contributions:** Valuing a wide range of research activities and results, including social impact and knowledge transfer. This implies recognising not only scientific publications, but also participation in public policy, human capital formation, and science outreach to the public.
- **Inclusion and equity:** Ensure that the evaluation system is fair and inclusive, recognising the particularities of the different areas of research. The plan focuses on reducing the barriers faced by certain groups, such as young researchers, women and those from under-represented disciplines, by providing specific support for their development and visibility.
- **Continuous adaptation:** Review and update evaluation practices in line with emerging needs and developments in research and open innovation. This principle

recognises that research is a dynamic process and that evaluation methods must evolve with it. To this end, a flexible system will be established to allow for the incorporation of new evaluation criteria when necessary.

Proposed Action Plan

The Action Plan focuses on five main axes to implement the necessary changes in research evaluation during the period 2024-2027:

1. **Review of research group evaluation processes:** IIS Biogipuzkoa will adjust its evaluation processes to better align research activities with CoARA principles. To do this, the current reflection proposed by the Institute on updating the criteria used to assess the quality of research will be continued, ensuring that priority is given to collaborative contributions, social impact and internationalisation, all supported by strategic R&I lines and policies which, in turn, govern the functioning of the organisation.
2. **Training and awareness-raising:** Training programmes will be implemented for the research community, management staff and platforms on the new evaluation methodologies. These trainings will cover topics such as open science, research ethics and the responsible use of metrics. Raising awareness of the importance of evaluating research more qualitatively and less reliant on simplified metrics will be a key pillar for the success of the plan.
3. **Fostering collaboration:** New policies and mechanisms to promote collaboration between research groups at IIS Biogipuzkoa and other organisations, both locally and internationally, will be promoted. Priority will be given to those projects that propose interdisciplinary approaches and that include the participation of different actors from the scientific and social ecosystem, including companies, public administrations and non-governmental organisations.
4. **Implementation of a monitoring and continuous evaluation system:** A monitoring system will be established to monitor progress in the implementation of the evaluation reforms. Qualitative data will be collected and annual reviews will be conducted to assess

the impact of new evaluation practices, ensuring their effectiveness and adjusting them where necessary.

5. **Active participation in the CoARA community:** IIS Biogipuzkoa will actively participate in the activities organised by CoARA at international level, exchanging good practices and contributing to the development of global standards for research evaluation. Participation in these networks will allow the IIS Biogipuzkoa research team to be in continuous contact with activities for the implementation of new evaluation practices.

Governance and monitoring

The Action Plan will be supervised by the Scientific Coordination team of IIS Biogipuzkoa in collaboration with the Scientific Directorate itself, and always under co-participation processes with the Institute's staff. The Scientific Coordination team will carry out biennial evaluations to ensure the correct implementation of the proposed actions. These evaluations will include a detailed review of the progress achieved in each of the axes of the plan, as well as the identification of areas requiring adjustment. In addition, the plan foresees the creation of an advisory committee, made up of external experts and members of IIS Biogipuzkoa, which will provide guidance on best practices and help to ensure that the plan is kept up to date with international trends in research evaluation.

Regular meetings will be set up with the heads of the research groups to assess compliance with the established objectives and to ensure that the Action Plan is fully integrated into the organisational culture of the Institute. The monitoring of the actions will also include the collection of qualitative data through interviews, surveys and focus groups to measure the impact of the reforms from a broader perspective.

Schedule of activities 2024-2027

The following chronogram details the activities planned within the CoARA Action Plan 2024-2027 of Biogipuzkoa. Among the key activities, a qualitative evaluation of the research groups will be carried out in 2025, assessing the last two years of activity. This chronogram provides a roadmap for the implementation of the planned actions, ensuring constant monitoring and continuous improvement in the evaluation of research.

Schedule of activities

2024 (january-june):

- Start of the Action Plan and coordination meetings between the Scientific Direction and the Scientific Coordination of the Institute.
- Consolidate an internal evaluation model (Scientific Monitoring Plan 360, onwards SMP360) as a tool for evaluating the impact and quality of the research accomplished in Biogipuzkoa.
- Informative sessions on the CoARA principles and the new consolidated evaluation methodology for the research group leaders.
- Implementation of mechanisms for the collection of qualitative data and continuous evaluation of research projects.
- Apply for CoARA's First Call for Cascade Funding to try to implement a new evaluation model at the Institute in 2025.

2024 (july-diciembre):

- Initial evaluation of the impact of the first training actions and adjustments to the evaluation tool.
- Promotion of multi- and interdisciplinary collaboration within Biogipuzkoa and other institutions.
- Arrangement of the next internal evaluation of research groups (evaluation 2025).

2025 (january-june):

- Formal qualitative evaluation of the research groups, focusing on the last two years of activity (2023-2024). This evaluation will be performed through SMP360 supported by interviews and analysis of the results obtained by the groups in terms of quality and impact, beyond traditional metrics.
- Make adjustments in the evaluation criteria according to the results of the qualitative evaluation carried out.

2025 (july-diciembre):

- Continuance of training actions, including workshops on how to integrate open science and research ethics in the Institute's projects.
- Review of research groups that have shown difficulties in complying with the new evaluation criteria and proposal of specific improvement plans.

2026:

- Consolidation of the good evaluation practices established in the first two years of the plan (2024-2025).
- Continuous evaluation of research groups with a focus on inter- and intra-institutional collaboration, social impact and internationalisation.
- Active participation in CoARA's international forums, sharing advances and learning from other institutions.

2027:

- Final evaluation of the Action Plan, identifying achievements and areas for improvement.
- Preparation of a proposal for a new Action Plan for the period 2028-2031, based on the results of the implementation of the current Plan.
- Submission of a detailed report to CoARA and to internal and external stakeholders.