



OTM-R –Policy

Open, transparent and merit-based recruitment

OTM-R brings benefits to researchers, institutions and a country's research system. More specifically, OTM-R makes research careers more attractive, ensures equal opportunities for all candidates and facilitates mobility. The focus of an OTM-R system should therefore be on ensuring that institutions always aim at recruiting the best person for the job and that all recruitment procedures are based on principles of equal opportunities for all candidates (including internal and external).

In 2018, the founding institutes of i3S, INEB, IBMC and Ipatimup adhered to the Code of Conduct for the Recruitment of Researchers. In 2021, the three institutes INEB, IBMC and Ipatimup received the 'HR Excellence in research' award. Recently, i3S adopted the HRS4R Award of Ipatimup.

The proposal reflects our commitment to continuously improve our human resource policies in line with the European Charter for Researchers and the Code of Conduct for the Recruitment of Researchers, notably our commitment to achieve fair and transparent recruitment and appraisal procedures. These key documents establish the guidelines for European universities and institutions to improve the recruitment and working conditions of researchers, making research careers more attractive and accessible in Europe.

In order to promote the development of excellence in research at i3S, it is essential to have a quality recruitment process for researchers and to accompany them throughout their career. It is in that context and in line with the Code of Conduct for Researchers, that i3S, INEB, IBMC and Ipatimup are committed to ensuring that recruitment selection procedures are fair and completely transparent.

The recruitment and selection process at i3S, INEB, IBMC and Ipatimup is one of our strengths. All our vacancies are posted on the institute website, on Euraxess and on social media.

Advertisements have a lot of information not only about the vacancy but also about legislation and external links with useful information. The institute has clear and transparent rules for recruitment of researchers at all levels (R1 to R4). We stress out that the most important recruitment tool we use is a public advertisement, with specific methods and metrics of evaluation that we publish at our websites, Euraxess, LinkedIn, Facebook, Twitter and mailing lists. Sometimes, if the funding program demands it, we also publish the advertisements at a national or international newspaper.

There is total transparency in the selection of candidates, the merits they are judged on and the recognition of their qualifications. The current regulations ensure that there is no discrimination and include complaint mechanisms: after the selection process, all candidate receive an email with final results those interested candidates are given ten working days to question the results. There is no complex administrative processes, an email to Human Resources Department is enough.

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I3S, INEB, IBMC and Ipatimup promote equality policy, so no candidate can be privileged, benefited, impaired or deprived of any right or exempted of any duty on the basis of, inter alia, ancestry, age, gender, sexual orientation, marital status, family status, economic status, education, social origin or condition, genetic heritage, reduced working capacity, disability, chronic disease, nationality, ethnic origin or race, place of origin, language, religion, political or ideological convictions or union membership.

INEB, IBMC, Ipatimup and i3S follow the national legislation for scientific employment (decree law 57/2016, which includes clear rules for the recruitment and evaluation of candidates) and for Fellowships (the national Research Fellowship Holder Statute and the mandatory translation for our own Fellowship Regulation, that is published online at the institutes websites).

Moreover, the Human Resources Department is permanently available for counselling the researchers involved in recruitment processes, and to check the administrative and legal issues of those processes, as well as all written documentation and interaction with the candidates.

The main stages in the recruitment process at i3S, INEB, IBMC and Ipatimup, are:

a) Advertising and application phase

Following the principles of Open, transparent and merit-based recruitment (OTM-R) of the Code of Conduct for the Recruitment of Researchers, all our advertisements for research positions are as concise as possible, nevertheless applicants are able to find information on:

- ✓ the organization
- ✓ applicable Legislation
- ✓ job title, number of available positions, specifications and starting date
- ✓ researcher career profiles (R1-R4) with the respective 'required' and 'desirable' competencies
- ✓ evaluation criteria and their respective 'weight'
- ✓ evaluation committee (names of the committee members)
- ✓ workplace, entitlements (salary, other benefits, etc.), type and duration of Contract
- ✓ application procedure, rules applied, opening date and deadline
- ✓ complaint and appeal periods and procedures reference to the institution's equal opportunities policy (e.g., positive discrimination, dual careers, etc.)
- ✓ reference to the institution's OTM-R policy

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In order to guarantee transparency and good practices in the advertising phase, principal investigators (PIs) and research groups are provided with standardized template for job advertising. They must fill out the mandatory fields containing the aforementioned job specifications and details. This process keeps the administrative burden for PIs and research groups to a minimum. In order to reduce the administrative burden for applicants, applications are submitted online. Original documents and qualifications, if necessary, are only requested in the appointment phase. After submitting the application, applicants are notified that their application has been received.

b) Evaluation and selection phase

To guarantee that the best person for the job is recruited, the selection process must always be conducted in line with the principles of merit, ability, transparency, openness, equal opportunity and non-discrimination. In particular, candidates are to be evaluated without discrimination based on gender; nationality; ethnic or social background; disability; age; religion; sexual orientation; political opinions or their socioeconomic situation.

Additionally, interruptions and variations in a researcher's career (such as career breaks, sabbaticals, maternity or paternity leave, etc.) will not be penalized, as they are considered to be a natural facet of a researcher's professional evolution and, consequently, represent valuable contributions to their professional development in multidisciplinary contexts.

The members of the selection or evaluation committee are public at the moment the call is opened. The committee will comprise at least three experts in the relevant knowledge areas whose academic qualifications are on a par with those required for the position on offer, or superior. Regarding the Researchers Positions the committee members are proposed to the Board of Directors by the group leader or the person in charge of the project. In these cases, the Board of Directors formally nominates the selection committee. To safeguard objectivity, external experts often feature in evaluation and selection committees. The members of the selection committee should operate independently and must declare any conflict of interest.

All applications are pre-screened to check their eligibility. The specific evaluation criteria to be used are included in the call for applications. The committee will take the applicant's academic record into account as a primary criterion, as well as score the information displayed in the CV considering the metrics and the respective weights described in the advertisement.

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Regarding the researchers positions the committee will also take into account that the evaluation is not only based on specific curricular metrics, but that the scientific and curricular career evaluation focuses on relevance, quality and up-to-datedness, namely of scientific, technological or cultural production in the last five years, deemed most relevant by the candidate; of research activities, applied or based on practical work developed and/or of knowledge extension and dissemination activities developed, namely under the scope of the promotion of culture and scientific practices.

Generally speaking, candidates are also commonly assessed through interview processes. The purpose of the interview is to further clarify the curricular elements presented and on researcher's recruitment process has a maximum ponderation of 10% of the final classification, as stated in national recruitment legislation for the recruitment of PhD's. The interview is not mandatory and is conducted by the evaluation committee. Alternatively, candidates to Senior Researcher or Group Leader (R3 and R4) positions can be invited to do a public presentation.

c) Appointment phase

Feedback

In line with the principle "Transparency" of the Code of Conduct for the Recruitment of Researchers, all applicants receive electronic notice at the end of the recruitment process. We strongly recommend the jury to inform all applicants who were selected to the interview about the strengths and weaknesses of their application. All applicants are entitled to further feedback upon request, within ten working days of the release of the classification ranking.

Complaints mechanism

The institution has an established procedure to deal with complaints made by applicants who believe that they have been treated negligently, unfairly or incorrectly. This procedure is transparent and made public on the Announcements.

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