

Open, Transparent and Merit-Based Recruitment Policy (OTM - R Policy)



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1. Introduction

Iscte-Lisbon University Institute was awarded the European Human Resources Excellence in Research Award on 17 March 2025. The European Commission awards the <u>HR Excellence in Research</u> certification to institutions that are committed to promoting a stimulating and favourable working environment for the creation, transfer and sharing of knowledge, as well as the professional development of researchers.

Iscte is committed to a recruitment policy based on openness, transparency and merit, in order to ensure equal opportunities for all applicants, selecting the people with the most appropriate skills for the positions that are open.

Iscte has endorsed the principles set out in the European Charter for Researchers and the Code of Conduct for the Recruitment of Researchers. As recommended by these two key documents issued by the European Commission, the adoption of these guidelines brings benefits to researchers, institutions and the research ecosystem in general. This makes a career in research more attractive, giving researchers the same rights and obligations regardless of the country in which they work within the European Union, enabling Europe to make the most of its scientific potential.

The OTM-R Policy aims to embody the principles of the European Charter for Researchers and the Code of Conduct for the Recruitment of Researchers, providing more detailed information on the recruitment and selection process, from the announcement stage to the approval stage. Accordingly, this document contributes to the planning, organisation and conduct of the attraction and selection processes.

In 2024, Iscte drafted Regulation No. 872/2024 of 8 August, which approves the Regulation on Research, Science and Technology Staff under Individual Contracts. This regulation establishes the career path and defines the rules for the recruitment and hiring, within Iscte, of researchers under individual employment contracts for an indefinite duration or terminable, fixed-term or temporary.

This regulation revises the regulatory framework applicable to research, science and technology staff under individual contracts, which is now integrated and consolidated into a single regulatory instrument. In this regard, the recruitment and selection phases set out below are detailed in <u>Regulation No. 872/2024 of 8 August</u>.

This framework is complemented by express reference to the Labour Code (Law No. 7/2009), the Legal Framework of Higher Education Institutions (Law No. 62/2007), the Scientific Research Career Statute and the common regime for scientific research careers under private law (Law No. 55/2025), and the PhD Hiring Regime, for people with doctorates, aimed at stimulating scientific and technological employment in all areas of knowledge (Decree-Law No. 57/2016, amended by Law No. 57/2017), ensuring full compliance with Portuguese labour legislation and European best practices established by the European Commission.

2. General principles relating to recruitment

In accordance with <u>Regulation No. 872/2024 of 8 August</u>, hereinafter referred to as the regulation, recruitment for research careers under private law is subject to **the** following **general principles**:

- a) Adequate fulfilment of the human resource requirements set out in Iscte's activity plan and budget and the existence of a vacancy in the respective category;
- **b)** Freedom of application and guaranteed equal conditions and opportunities for all applications;
- c) Transparency, impartiality and publicity in the Selection Committee's actions;
- **d)** Merit, reflected in the suitability of the criteria to the specific area for which the competition is open, in order to recruit the most suitable person for the vacancy;
- e) Proportionality of requirements in relation to the duties to be performed;
- f) Guaranteed physical and digital accessibility, in accordance with Decree-Law No. 82/2022;
- **g)** Compliance with the principles of the European Charter for Researchers, the Code of Ethics and Conduct, and Iscte's Equality, Diversity and Inclusion Plan.

Needs/
HR vacancies

Equal conditions and opportunities

Transparency and impartiality

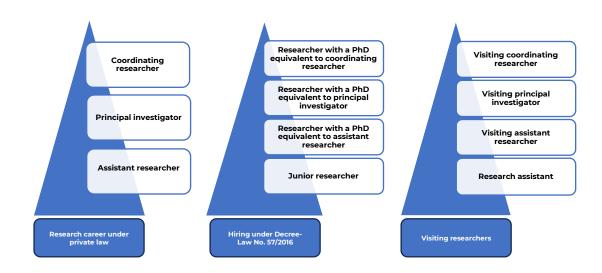
Merit

3. Hiring and career

The **hiring** of research staff under private law is carried out on the basis of **indefinite duration** or **fixed-term** employment contracts.

Types of Contracts		
Indefinite duration	Researchers who are part of the research career under private law.	
Fixed-term	Researchers with a PhD hired under <u>Decree-Law No. 57/2016</u> of 29 August (see pages 16 and 17);	
	Visiting researchers (see pages 17 and 18).	

The research staff **career** progresses **from the bottom to the top** through the following categories:



4. Opening of the competition procedure and publication of the notice

The opening of the competitive selection process begins with the preparation of a proposal by the directors of the <u>Research Units</u>, after consultation with the respective Scientific Committees, which is addressed to the Rector. The proposal must include:



A well-designed public notice (call for applications) helps to attract suitable applications for the vacant positions. It makes the process transparent and objective in its assessment, allowing applicants to be selected on the basis of their merit.

The call for applications should describe the knowledge and skills required and should not be so specialised as to discourage suitable candidates.

Therefore, each notice undergoes a rigorous drafting and validation process before being published. The draft notice is prepared by the Research Units, in collaboration with the Research Support Office. The draft is then sent to the Chair of the selection panel, who validates it with the Legal Office, after which it is put to a vote by the members of the selection panel. Once approved, the notice is sent to the Human Resources Unit for publication.

In accordance with an open and transparent recruitment policy, the **call for applications** must contain the following information (as provided for in Article 12 of the regulation):

- a) The scientific area, and/or secondary scientific area, and/or sub-area for which the competition is open, where the competition may be open to more than one scientific area, secondary scientific area or sub-area;
- **b)** The career, category and number of positions available;
- **c)** The admission requirements and requirements for approval based on absolute merit:
- d) The selection methods and their respective weightings;
- e) The selection criteria and their respective weightings;
- f) The terms under which the research project referred to in Article 22 of this regulation must be prepared;
- **g)** The terms under which the interview is conducted;
- h) The scale, voting methodology and tie-breaking criteria;
- i) The remuneration and working conditions;
- j) The place of work;
- k) The composition of the Selection Committee;
- Indication that communication with applicants will be carried out via e-mail or a dedicated platform for this purpose;
- **m)** The entity to which the application should be submitted, with its address, deadline for submission, form of presentation, documents to be attached and other information required to formalise the application.

The call for applications must also refer to the non-discrimination and equal opportunities policy, using gender-neutral language.

Recognising the importance of attracting international applications, Iscte publishes its notices in bilingual format.

Calls for applications are published in a variety of communication channels, such as:

On Iscte's recruitment platform/website, which contains the notices, in addition to the necessary documentation in Portuguese and English to send with the application;

Communication Channels

In a nationally distributed communication medium, containing only general information about the recruitment procedure, referring to the lscte website;

In the 2nd series of *Diário da República* [Official Gazette], on the *Bolsa de Emprego Público* [Public Employment Exchange] and in other media, including those with international reach, namely on the Euraxess portal, with the notice published in English.

In order to reach a wider audience and attract more applications, in addition to publishing on the <u>Euraxess</u> portal, Iscte also advertises job offers on social media, such as Facebook and LinkedIn, and other channels considered appropriate for the areas covered by the competition.

5. Submission of applications

Applications are made on <u>Iscte's recruitment platform</u>, where the published notices are posted. An application form must be completed and all the documents requested for the application must be attached.

The application form and the required documents can only be submitted electronically and may be attached gradually, allowing the application to be edited until the submission deadline.

The deadline for submitting applications is set in the call for applications and cannot be less than 15 consecutive days from the date of its publication in *Diário da República* (Official Gazette).

Iscte's recruitment platform reduces the bureaucratic burden associated with these processes, and Iscte is committed to ensuring that applicants can track the status of their application, in order to make the recruitment experience more user-friendly.

6. Selection Committee

The Selection Committee is defined at the start of the competition procedure, and the composition of the selection panel must be included in the published public notice. The Selection Committee must have diverse knowledge and skills and an appropriate balance between men and women.

Iscte has laid down a set of rules in its regulation regarding the appointment and composition of the Selection Committee for competitions, namely (Article 14):

- 1. The Selection Committee will be appointed by the Rector, on the proposal of the Scientific Council, after consultation with the Scientific Committees of the respective Research Unit.
- **2.** The composition of the Selection Committee will comply with the following rules:
- a) The number of members will not be less than three nor more than nine;
- b) The members are professors and/or researchers, internal and/or external to Iscte, and/or specialists of recognised merit, national or foreign;
- c) At least 25% of the members must belong to the scientific area, secondary scientific area or sub-area for which the competition is open;
- d) Members will hold a higher category than that for which the competition is open, or an equal category in the case of a competition for a coordinating researcher.
- **3.** The Selection Committee will be chaired by the Rector of Iscte, or by a professor or researcher appointed by the Rector.

The Selection Committee's powers and functioning are described in Articles 15 and 16 of the regulation.

6.1 Conflict of interest



The selection panel will be composed of impartial and qualified members who assess the applications. The composition of the selection panel will be made public, and jury members who, at any stage of the selection process, consider that their ability to perform their duties fairly is compromised, or when a conflict of interest may arise that could affect their impartiality, must immediately inform the Chair of the Selection Committee and request to be excused from participating in the respective procedure, in accordance with the provisions of Articles 69 to 76 of Decree-Law No. 4/2015 of 7 January (Code of Administrative Procedure).

6.2 Data protection



During the recruitment and selection process, members of the Selection Committee may have access to confidential information about the applicants. The information and all discussions must remain confidential during and after the recruitment and selection process, in line with best data protection practices.

6.3 Equal opportunities



Iscte is committed to ensuring equal access to employment through a human resources policy based on the principles of equality, non-discrimination and respect for the diversity of its employees. This guiding principle is reflected in the Human Resources policy regarding the recruitment and selection of potential applicants.

Members of the Selection Committee must follow the above principles, ensuring that no applicant is privileged, benefited, disadvantaged or deprived of any right or exempt from any duty, namely on the grounds of ancestry, age, sexual orientation, marital status, family situation, economic situation, education, social origin or condition, genetic heritage, reduced working capacity, disability, chronic illness, nationality, ethnic or racial origin, territory of origin, language, religion, political or ideological beliefs, and trade union membership.

7. Admission and approval based on absolute merit

Once the application period has ended, the Human Resources Unit will share the applications and a summary table of them with the Selection Committee.

7.1 Admission of applications

The Selection Committee will decide on the **admission** and **exclusion** of applicants from the competition.

The provision of false statements or the presentation of false documents will result in the applicant's exclusion, without prejudice to referral to the competent authorities for disciplinary and/or criminal proceedings.

Admission

Admission is conditional upon fulfilment of **the admission requirements** and the correct completion of the application, in accordance with the precise terms defined in the competition's call for applications.

Exclusion

In the event of non-admission, the Selection Committee will **notify the excluded applicants for the purposes of a preliminary hearing** in accordance with the terms and provisions of the Code of Administrative Procedure.

7.2 Approval based on absolute merit

Approval based on absolute merit depends on the possession of a comprehensive curriculum vitae that the Selection Committee considers to be of scientific merit and research capacity compatible with the position and category being competed for. It also depends on compliance with the absolute merit requirements set out in the competition's call for applications, which must take into account:

Absolute merit

Requirements (call for applications):

- a) The applicant's scientific production;
- **b)** Participation and/or coordination of **R&D projects** with national and/or international funding;
- **c)** Merit of **the scientific project** presented and its suitability for the competition area.

Applicants excluded in previous stages will be notified for the purposes of a hearing of the persons concerned pursuant to the Code of Administrative Procedure.

8. Assessment and selection of applications

Curriculum assessment and **interviews** are mandatory selection methods. The selection methods are used in stages, as follows:

Curriculum assessment: initially applied to all applications approved on the basis of absolute merit and focused on the relevance, quality and timeliness of mandatory criteria considered and weighted.

Curriculum assessment criteria:

- a) The applicant's scientific, technological, cultural or artistic production;
- b) Participation and/or coordination in projects with funding;
- c) Teaching activities and supervision of theses and dissertations;
- **d)** Outreach and knowledge dissemination activities, particularly in the context of promoting scientific culture and practices;
- **e)** Management of science, technology and innovation programmes, or experience in observing and monitoring the scientific and technological system or higher education, in Portugal or abroad;
- f) Three-year scientific project submitted for the purposes of the competition.

The criteria listed above are assigned weighting factors that must comply with the following rules:

- a) The sum of the weightings in points a) and b) cannot be less than 50%;
- b) The three-year scientific project has a weighting of between 20% and 30%.

The weighting of the curriculum assessment in the overall assessment is established in the call for applications at between 60% and 75%.

Three-year scientific project

This is a three-year project that must include aspects of fundamental scientific research, applied research and/or scientific development, namely the transfer of knowledge to society.

The project must include the following elements:

Three-year scientific

- a) The state of the art;
- **b)** A description of the tasks to be carried out;
- c) The time schedule for the tasks;
- **d)** A description of the strategic alignment with the objectives of the Research/Host Unit;
- e) A description of the human and material resources required;
- **f)** The budget forecast;
- g) The list of numerical indicators per year to be achieved;
- **h)** Description of the project's scientific, societal and economic/technological impact.

For each call for applications posted on Iscte's recruitment platform, there is a Scientific Project Template with specific instructions for preparation.

Interview: applicable to all or some of the applicants ranked in the curriculum assessment, as defined in the call for applications.

Who is interviewed?

Applicants ranked in the curriculum assessment, in descending order of the classification obtained, in a number equal to or greater than the number of positions available times one point five (1.5), are admitted to the interview selection method. This number may be lower if the number of applications approved on the basis of absolute merit is lower.

What is the purpose of the interview?

The interview aims to discuss the scientific project submitted to the competition and verify the suitability of the applicant's curriculum vitae for carrying out this project.

What is assessed in the interview?

The interview assesses the applicants' professional and personal skills directly related to the competencies considered essential for performing the role, taking into account, in particular, the quality of presentation and communication skills, argumentative ability, critical and analytical thinking, degree of autonomy and leadership, as well as other skills considered relevant to the role, to be defined in the call for applications.

Under what conditions does the interview take place?

The interview is public, and the location, date and time of the interview will be made available and announced in a timely manner. It may be conducted in person or by video conference, at the discretion of the chair of the Selection Committee.

How much weight does the interview carry in the overall assessment?

The weighting of the interview in the overall assessment is established in the call for applications at between 25% and 40%.

Failure to attend the interview pursuant to the previously scheduled date, time and place amounts to withdrawal from the competition and constitutes grounds for exclusion from the competition.

Note: It is mandatory to consult Articles 19 to 24 of the regulation for detailed and comprehensive information on the assessment and selection of applications.

Once the selection methods have been applied, the Selection Committee will proceed with the final ranking of applications, with the stages of the procedure being recorded in the selection panel's minutes.

9. Publication of results and notification

In line with the principle of "Transparency" of the European Charter for Researchers and the Code of Conduct for the Recruitment of Researchers, the results of the competition procedure are published on Iscte's recruitment platform/institutional website, and candidates are notified of the results by e-mail sent by the Human Resources Unit. Accordingly, all applicants and the general public can check the classifications and the respective ranking of the applications. This transparency helps to ensure confidence in the process.

The documentation relating to the recruitment procedure will be kept on file by the Human Resources Unit, in accordance with the data protection policy.

10. Hearing of the persons concerned

Applicants have the right to comment, under the terms of Articles 121 and 122 of the Code of Administrative Procedure, on the results of the recruitment and selection procedure (hearing of the persons concerned). Therefore, during the preliminary hearing period (ten business days), by appointment, the persons concerned may consult the recruitment and selection process (applications and minutes) in order to have a clear idea of the reasons that led to a particular decision. In this way, applicants can learn about the strengths and weaknesses of their application and, if they wish to appeal the results, do so by sending an e-mail to the same address from which they received the notification of the results.

Any information consulted by the persons concerned must remain confidential during and after the recruitment and selection process, in line with best data protection practices.

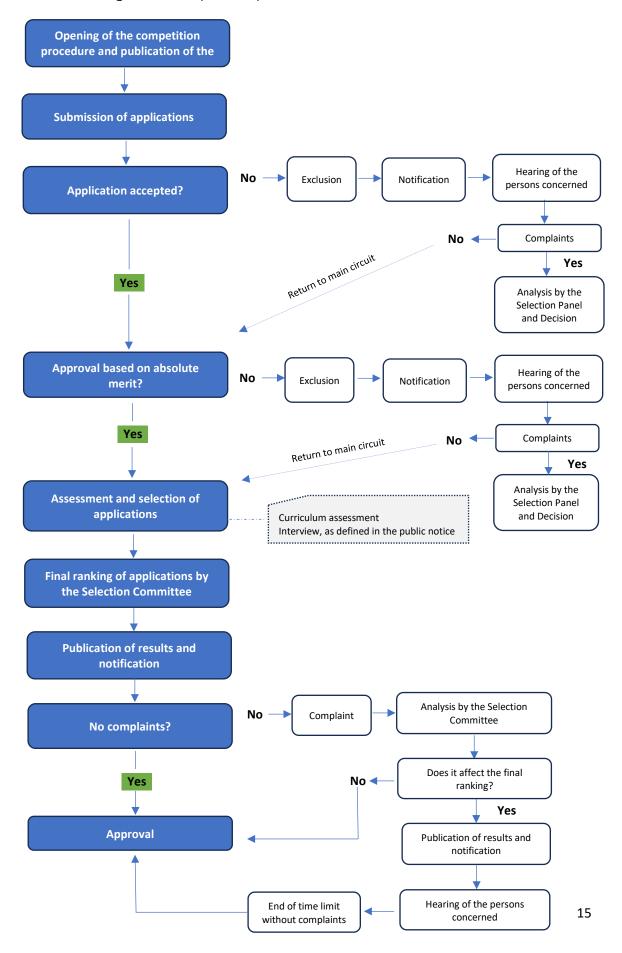
The statements made by the applicants are forwarded to the Selection Committee, which will conduct a rigorous and impartial assessment and respond to any complaints, which are then forwarded to the Human Resources Unit so that they can be communicated to the persons concerned. If the complaint is upheld, a new list will be published with the applicants being notified. In situations where the complaint does not result in any changes, the list becomes final.

At the final stage of the process, in the absence of complaints, or after responding to them, the list becomes definitive and the process will be submitted for approval by the Rector of Iscte. These guarantees and mechanisms aim to ensure that competitions are conducted in a fair, transparent and impartial manner, promoting confidence in the recruitment and selection system.

11. Approval

The Rector is responsible for the approval of the Selection Committee's final decision. Applicants, including those who were excluded at different stages of the competition, are notified of the approval of the final ranking list.

The following flowchart showing the main stages facilitates a comprehensive understanding of the competition procedures:



12. Other types of recruitment, hiring and sources of funding in the selection of researchers

12.1 Decree-Law 57/2016 of 29 August

Iscte complies with national legislation on the promotion of scientific and technological employment in all areas of knowledge. The hiring of researchers under Decree-Law No. 57/2016 of 29 August is subject to the regime provided for therein, as well as, with the necessary adaptations, the provisions of Chapter III of Regulation No. 872/2024 of 8 August, without prejudice to the specific rules laid down in Articles 27 to 32 of that regulation.

How are equivalent researchers and junior researchers recruited and hired?

Through a competitive selection process, which is open to PhD holders with a scientific and professional curriculum vitae that is appropriate for the activity to be carried out.

Only persons who have held a **PhD for less than five years** with limited postdoctoral research experience may apply for the competitive selection process for the recruitment of **junior researchers**.

How is the selection panel appointed?

The selection panel will be appointed by the Rector, upon proposal by the Scientific Council.

What are the rules for the composition of the selection panel?

- a) It will be composed of a **minimum of three and a maximum of five members**, professors and/or researchers, internal and/or external to Iscte, and/or specialists of recognised merit, national or foreign;
- b) It will consist **mainly of members belonging to the scientific area** for which the competition is open or to related areas relevant to the specific case;
- c) The members will hold a higher category than that for which the competition is open or an equal category in the case of a competition for a researcher with a PhD equivalent to a coordinating researcher.

How does the selection panel work?

The chair of the selection panel is the Rector, who may delegate this role to the director of the Research Unit or the researcher responsible for the project that frames and finances the contract.

The selection panel can only take decisions when at least two-thirds of its members are present.

More detailed information on how the selection panel works can be found in Article 29 of Regulation No. 872/2024 of 8 August.

What are the mandatory and optional selection methods?

Selection method	Parameters
Mandatory	Assessment of scientific and curricular background.
Optional	Interview or a presentation or public demonstration session by the applicants.

More detailed information on the mandatory and optional selection methods can be found in Articles 31 and 32, respectively, of <u>Regulation No. 872/2024 of 8 August</u>.

12.2 Visiting researchers

The recruitment by invitation of researchers under private law is provided for in Regulation No. 872/2024 of 8 August, namely in Article 33 of that regulation.

How are visiting researchers recruited?

Visiting researchers under private law are recruited by invitation, in accordance with the following requirements:

Category	Requirements
Coordinating researchers	Persons with a PhD whose merit in the relevant scientific and technological field is proven by their scientific curriculum.
Principal investigators	
Assistant researchers	
Research assistants	Graduates or masters.

How are visiting researchers hired?

Visiting researchers under private law are hired according to the following parameters:

Category	Parameters
Coordinating researchers	This is the responsibility of the director of the
Coordinating researchers	Research Unit and must be accompanied by the
Principal investigators	opinions of at least two researchers or professors in
Timelpar investigators	the scientific field of the person to be hired, a
Assistant researchers	curriculum vitae, and indication of the category,
	period and type of contract.
	The director of the Research Unit interested in hiring
Research assistants	is responsible for proposing the hiring of the
Research assistants	researcher to the Rector, indicating the period,
	category and type of contract.

More detailed information on the hiring of visiting researchers can be found in Article 33 of Regulation No. 872/2024, of 8 August.

13. Working conditions and development opportunities

Iscte offers working conditions in accordance with labour legislation and the principles of the European Charter for Researchers and the Code of Conduct for the Recruitment of Researchers. In this regard, Iscte is committed to ensuring adequate conditions that enable efficient and high-quality performance by researchers, namely:

- ✓ A collaborative working environment with the possibility of participating in international and multidisciplinary projects;
- ✓ Modern infrastructure designed for research development and knowledge transfer;
- ✓ Facilities with appropriate space for nursing mothers and a nappy-changing room;
- ✓ A room equipped for people with special needs;
- ✓ A welcome session and onboarding manual for new researchers;
- ✓ Training opportunities to strengthen skills and competences;
- ✓ Working models that contribute to a good work-life balance;
- ✓ A wide range of services and platforms that ensure quality support for research activities.

Iscte comprises eight high-quality <u>Research Units</u>, recognised by international external evaluations carried out by the Foundation for Science and Technology (FCT). Would you like to know more about **Research** at Iscte? Click <u>here</u>.

It is important to note that Iscte has a staff made up of various professional groups, which enhances opportunities for development. Hence, if research staff wish to pursue a different career in the teaching or technical areas, Iscte has recruitment and hiring regulations in place that also attest to openness, transparency and merit in the processes developed.

Teaching Staff:

- Regulation for Recruitment, Selection and Hiring of Teaching Staff of Iscte
- Regulation for Recruitment and Selection of Teaching Staff under Individual Employment Contracts
- Regulation for Recruitment and Selection of Specially Hired Teaching Staff of Iscte

Technical Staff:

- Internal Regulation for Recruitment and Selection of Non-Teaching and Non-Research
 Staff under Individual Employment Contracts
- Regulation for Management Positions at Iscte

Thus, openness, transparency and merit are seen as a cross-cutting policy in any Iscte recruitment process, regardless of the professional group (Research Staff, Teaching Staff or Technical Staff).

14. Monitoring and continuous improvement

Compliance with the OTM-R Policy will be monitored annually by the Human Resources Unit using indicators such as the number of competitions per year; average recruitment time; and gender balance in the Selection Committee's composition. The results will be included in the report monitoring the implementation of the Seal Action Plan.

15. Equality, Diversity and Inclusion

Iscte uses inclusive and neutral language in its institutional communications to promote respect for diversity and ensure that everyone feels represented and welcome.

16. Useful contacts

We hope that the OTM-R Policy will contribute to a better understanding of the recruitment and selection practices developed by Iscte. Each employee can propose improvements to this document by sending their suggestions to the Human Resources Unit (urh@iscte-iul.pt).

Find out more about the <u>Research Units</u>, the <u>Research Support Office</u>, the <u>Laboratory for Innovation in Academia</u> and the <u>Human Resources Unit</u>. If you need any specific support or clarification, please contact the respective email addresses:

Research Units

- ❖ BRU (Business Research Unit) <u>bru-unide@iscte.pt</u>
- ❖ CEI (Centre for International Studies) cei@iscte-iul.pt
- ❖ CIES (Centre for Research and Studies in Sociology) <u>cies@iscte-iul.pt</u>
- ❖ CIS (Centre for Psychological Research and Social Intervention) cis@iscte-iul.pt
- CRIA (Centre for Research in Anthropology) cria@cria.org.pt
- DINÂMIA'CET (Centre for Socioeconomic and Territorial Studies)
 dinamia@iscte-iul.pt
- ❖ ISTAR (Information Sciences and Technologies and Architecture Research Centre) <u>istar@iscte-iul.pt</u>
- ❖ IT (Institute of Telecommunications Iscte Delegation) it-iul@iscte-iul.pt

Services and Offices

Below are some of the contact details for Iscte's services and offices. Click on the link above to see them all.

Research Support Office

gai@iscte-iul.pt

<u>Laboratory for Innovation in Academia</u>

❖ lia@iscte-iul.pt

Human Resources Unit

urh@iscte-iul.pt

Click <u>here</u> to follow Iscte's activities under the Human Resources Excellence in Research seal. Iscte is a place to grow, and we want you to grow with us!

#APlaceToGrow