iBET
Instituto de Biologia Experimental e Tecnológica

Open, transparent and merit-based recruitment (OTM-R) Policy

HR EXCELLENCE IN RESEARCH

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1. BACKGROUND

iBET recognizes the importance of ensuring an inclusive, transparent, and excellence-driven working environment. In this context, the Institute fully adopts the principles of the *European Charter for Researchers and the Code of Conduct for the Recruitment of Researchers* and is committed to implementing them through the *Human Resources Strategy for Researchers* (HRS4R).

Recruitment and selection processes at iBET comply with the national legal framework and European standards and follow the fundamental principles of **Openness**, **Transparency**, and **Merit**, ensuring equality of treatment, impartiality, and non-discrimination at all stages. Furthermore, iBET is ensuring proper integration of the European Commission Pay Transparency Directive guidelines in Human Resources processes.

This Policy establishes the general guiding principles applicable to the recruitment processes for Researchers at iBET.

This Policy applies to all stages of the recruitment process, from identifying the hiring need, advertising the position, and evaluating applications, to final selection and job offer, ensuring transparency and equity.

Furthermore, this Policy is aligned with iBET's broader institutional strategy, which promotes:

- Excellence in scientific research;
- International collaboration and mobility;
- Gender equality and diversity;
- Strengthening institutional reputation and competitiveness.

By embedding **Open, Transparent and Merit-based principles into its Recruitment practices (OTM-R)**, iBET reinforces its commitment to building a research environment that is inclusive, transparent, and internationally competitive.

Operational details, templates, and step-by-step procedures are defined in **Procedure S.013 – Hiring of Employees**.

2. RECRUITMENT PROCESS FRAMEWORK

The recruitment process at iBET follows a structured and consistent framework that ensures fairness, transparency, and alignment with OTM-R principles. This process is implemented according to the applicable legal framework. While the detailed operational steps are defined in Procedure S.013 – Hiring of Employees, recruitment is generally organized into three main stages:

- **Advertising and application Phase**

Job opportunities are disseminated through appropriate channels to guarantee open access to all potential candidates. Announcements include essential information on the role, requirements, evaluation criteria, and submission procedures, using inclusive and non-discriminatory language.

- **Evaluation Phase**

Applications are assessed by a qualified and disclosed non-conflict of interest Selection Committee based on predefined criteria. Evaluations focus exclusively on merit, competencies, and the requirements of the position. All steps are documented to ensure transparency and accountability.

- **Appointment Phase**

Following evaluation, the highest-ranked candidate is selected based on objective evidence and, when applicable, results are published. The selected candidate is then formally offered the position under the applicable legal framework.

3. OPENNESS

iBET ensures that all job opportunities are widely disseminated, allowing any interested individual to access the recruitment process. Depending on the type of contract or legal requirements, vacancies may be published through:

- iBET's institutional website
- iBET LinkedIn page
- EURAXESS platform
- Other channels required by legislation or funding agencies
- Additional communication channels appropriate to the vacancy profile

Job announcements are published in Portuguese and English and use inclusive, non-discriminatory language, in accordance with the Portuguese Labour Code, according to the applicable legal framework (Portuguese labour code or research fellowships).

Announcements shall include essential information such as:

- Recruiting entity (e.g., research group, unit, or project)
- Position category and profile
- Type of contract

- Eligibility and admission requirements
- Selection criteria and methods
- Composition of the Selection Committee
- Application deadlines and submission procedures
- Reference to equality and non-discrimination

iBET is committed to avoiding overly restrictive or unnecessary criteria that may create unjustified barriers to participation.

4. TRANSPARENCY

iBET's recruitment procedures strictly observe the national legal framework and institutional regulations. To ensure transparency:

- All evaluation criteria are defined in advance and published in the job announcement;
- The Selection Committee composition is public and, whenever possible, gender-balanced;
- Selection methods and stages are clearly described;
- All steps of the process are formally documented;
- Candidates are informed of outcomes, and final results are shared on institutional channels when applicable.

All documentation is handled confidentially and in accordance with the General Data Protection Regulation (GDPR). Access is restricted to authorized personnel, and records are retained for a period defined by institutional and legal requirements.

5. MERIT

Applications are assessed against the requirements and criteria defined in the job announcement, ensuring objectivity and fairness.

Selection Committees:

- Are composed of impartial, qualified members with adequate seniority;
- Evaluate candidates independently, declaring any conflicts of interest;
- Base decisions strictly on predefined criteria;

- Record deliberations in formal minutes.

iBET values diverse career paths and acknowledges that career interruptions (e.g., parental leave, sabbatical periods) must not penalize candidates during assessment.

6. EQUALITY, DIVERSITY AND INCLUSION

iBET upholds an active policy of equality, diversity, and inclusion, ensuring equal access to employment and career development. No candidate may be advantaged or disadvantaged based on:

- ancestry, age, gender identity, sexual orientation
- marital or family status
- disability or chronic illness
- socioeconomic background
- nationality, ethnic origin, race
- political, ideological, or religious convictions

Inclusive language and removal of unjustified barriers are fundamental to this policy.

7. COMPLAINTS AND CANDIDATE RIGHTS

All candidates have the right to submit complaints or requests for clarification regarding the recruitment process.

Complaints must be submitted in writing within the legally established deadlines and are analysed objectively, ensuring fairness and timely response.

8. ROLES, RESPONSIBILITIES AND CAPACITY BUILDING

iBET ensures clarity and accountability in recruitment processes by defining the following high-level roles:

- **Human Resources**: Ensures legal and procedural compliance, supports hiring teams, and safeguards documentation and communication standards.
- **Lab Heads / Principal Investigators:** Identify recruitment needs, contribute to job definitions, and participate in candidate evaluation in coordination with Human Resources.

- **Selection Committees:** Appointed based on expertise and seniority, operating independently and in accordance with OTM-R and HRS4R principles.
- **Executive Committee:** Confirms recruitment decisions and validates updates to this policy.

To reinforce fair and consistent recruitment practices, iBET promotes capacity building by providing access to internal guidelines, tools, and resources that support inclusive, unbiased, and merit-based recruitment.

9. MONITORING AND CONTINUOUS IMPROVEMENT

iBET monitors compliance with *OTM-R* principles through:

- Key performance indicators;
- Periodic internal reviews;
- Updates to procedures whenever necessary, particularly following legislative or institutional changes.

This Policy is reviewed in accordance with iBET's internal review procedures, or whenever significant changes occur in national or European legislation. All updates are formally approved by the **Executive Committee** and communicated to relevant stakeholders across the institution.

10. REFERENCES

• European Charter for Researchers (Manuscript November 2025)

• Open, Transparent and Merit-Recruitment (OTM-R) Guidelines and Toolkit (EURAXESS,

as available in the HR Excellence in Research Award Guidelines, version March 2026)

• Human Resources Strategy for Researchers (HRS4R) Framework – European Commission

• EU Pay Transparency Directive (EU 2023/970)

• Portuguese Labour Law (7/ 2009) and subsequent approved amendments

• Decree-Law 57/2016 and Law 57/2017

• Portuguese Research Fellowship Holder Statute (Estatuto do Bolseiro de Investigação -

EBI, approved by Law 40/2004)

- Procedure S.013 – Hiring of Employees (available internally at iBET intranet)

11. FINAL PROVISIONS

This OTM-R Policy was approved by the iBET Executive Committee on September 18, 2026 and enters into force on the date of its publishing.

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