## HR Excellence in Research

# OTM-R Checklist

Dear User, please be advised that the **EURAXESS** and **HR Excellence in Research** portals will be unavailable for scheduled maintenance on **7 Oct 2026, from 13:00 to 16:00 CET**. We apologize for any inconvenience this may cause and appreciate your understanding.

## OTM-R Checklist

**Case number**

2025PT372300

**Name Organisation under review**

instituto de biologia experimental e tecnológica

**Organisation’s contact details**

Avenida da Republica - Qta do Marquês, Oeiras, 2780-157, Portugal

**Date endorsement charter and code**

13/10/2025

**Submission date to the European Commission**

06/10/2026

## OTM-R checklist

A specific self-assessment checklist is provided for OTM-R. Please report on the status of achievement, and also detail on the indicators and the form of measurement used.

- The 'Open', 'Transparent' and 'Merit-based' checkboxes are indicative of the types of policies and practices the questions refer to, as detailed in the European Charter for Researchers. They are preset in the HR Excellence in Research e-tool and cannot be changed. Institutions do not need to act in this respect.
- The difference between '+/- Yes substantially' and '-/+ Yes partially' ratings is that, in the first case, the volume of the remaining work to be done until completion is small compared to the effort that has been put so far in that direction, whereas for '-/+ Yes partially', the remaining work is either the same in volume or more than what has been achieved.
- For the 'Suggested indicators' column, whenever the user hovers the mouse over the row dedicated to each question, a small text box will pop up, indicating options of potential indicators to use. However, each institution needs to define its own means of measuring the effectiveness of its OTM-R policy, which should be further reviewed and adapted as necessary.

| | Open | Transparent | Meritbased | Answer: | Suggested indicators (or form of measurement) |
|---|---|---|---|---|---|
| OTM-R system | | | | | |

| | Open | Transparent | Meritbased | Answer: | Suggested indicators (or form of measurement) |
|---|---|---|---|---|---|
| Have we published a version of our OTM-R policy online (in the national language and in English)? | x | x | x | ++ Yes completely | The OTM-R policy is published on iBET's website both in Portuguese and in English: https://www.ibet.pt/about-us/hr-excellence-in-research/ |
| Do we have an internal guide setting out clear OTM-R procedures and practices for all types of positions? | x | x | x | ++ Yes completely | iBET has an internal guide setting out clear OTM-R procedures and practice for all types of positions on the intranet ("Recruitment Guideline" page), available to all employees. |
| Is everyone involved in the process sufficiently trained in the area of OTM-R? | x | x | x | +/- Yes substantially | The administrative staff is trained in current recruitment procedures. The researchers who carry out the selection procedures do not receive any training in this respect, but they have a very detailed scale to apply and established selection criteria. In the GAP Analysis and in the Action Plan, it is elaborated that there is a need for basic training for representatives involved in the recruitment process such as Lab Heads and senior scientists. Initiative: Provide training for those involved in selection processes to recognize and assess a wider range of skills and competencies, including creativity, independence, and management. Training sessions will include a reflection on merit base and unbiased evaluation. The iBET recruitment training program will include periodic sessions on this topic. Indicator: Number of training sessions/year. |

| | Open | Transparent | Meritbased | Answer: | Suggested indicators (or form of measurement) |
|---|---|---|---|---|---|
| Do we make (sufficient) use of e-recruitment tools? | x | x | | +/- Yes substantially | Information on calls for pre-doctoral, post-doctoral, and research project contract staff is centralized on a dedicated page on the website (https://www.ibet.pt/careers/job-offers/internal/) and on the iBET's LinkedIn, Euraxess and whenever is legally required also in national public newspapers. iBET doesn't have a digital platform for applications, but all the information is collected via a dedicated email address, which is only managed by HR staff. Initiative: iBET will assess the use of a digital recruitment tool, after internal evaluation of the number of applicants received per year and administrative workload associated. Indicator: For this assessment, an annual HR report with metrics regarding recruitment process. |

| | Open | Transparent | Meritbased | Answer: | Suggested indicators (or form of measurement) |
|---|---|---|---|---|---|
| Do we have a quality control system for OTM-R in place? | x | x | x | +/- Yes substantially | All iBET employees can access the document management system at iBET, where it is made available the approved version of templates for the job ads, the evaluation table and selection committee minutes. iBET HR dedicated personnel, properly trained in OTM-R policy, ensures close monitoring of key steps of the recruitment process and validates all associated documentation. For public funding positions, iBET needs to submit all related documentation which is validated by the external funding entities. The final candidates' ranking for each position announced is published on iBET website, and the applicates have the legal right to complain within 10 working days through the dedicated email (jobs@ibet.pt). Initiative: Implement periodical internal audits to the recruitment process Indicator: Annual review of a sample of recruitment processes. |
| Does our current OTM-R policy encourage external candidates to apply? | x | x | x | ++ Yes completely | All iBET job ads are published in Portuguese and English. In addition to the job add publication on the website, the majority of the job ads are also published on Euraxess and in iBET' LinkedIn page to ensure that is widely disseminated. |

| | Open | Transparent | Meritbased | Answer: | Suggested indicators (or form of measurement) |
|---|---|---|---|---|---|
| Is our current OTM-R policy in line with policies to attract researchers from abroad? | x | x | x | +/- Yes substantially | iBET's current OTM-R Policy is aligned with efforts to attract researchers from abroad. Statistics show that iBET receives applications from researchers worldwide. Publication on EURAXESS has been a legal requirement since 2021 for specific research positions (previously advertised through ERA Careers), such as fellowships and postdoctoral contracts. Initiative: Track the number of applications received from international researchers and compare it with the total number of applications received for each job advertisement. Indicator: Annual statistical review of applicants and recruited candidates. |

| | Open | Transparent | Meritbased | Answer: | Suggested indicators (or form of measurement) |
|---|---|---|---|---|---|
| Is our current OTM-R policy in line with policies to attract underrepresented groups? | x | x | x | +/- Yes substantially | Under the Portuguese legislation (Law 4/19) there is a percentage of places that must be reserved to candidates with specific disabilities. in all iBET job adds it is clearly stated the "Non-discrimination and equal access policy", which states the following: "iBET actively promotes a policy of non-discrimination and equal access, so that no candidate can be privileged, benefited, harmed or deprived of any right, on basis of age, sex, sexual orientation, marital status, family status, economic situation, education, social origin or condition, genetic heritage, reduced working capacity, disability, chronic illness, nationality, race, territory of origin, language, religion, political or ideological convictions, and trade union membership". All applications are only evaluated based on their CVs and competencies presented, regardless of their disabilities, gaps in their CVs and any immigrant background. Initiative: Review current recruitment procedures to assess how outreach, accessibility, and monitoring mechanisms can better support the participation of underrepresented groups, in compliance with applicable law. Indicator: Annual statistical review of applicants and recruited candidates. |

| | Open | Transparent | Meritbased | Answer: | Suggested indicators (or form of measurement) |
|---|---|---|---|---|---|
| Is our current OTM-R policy in line with policies to provide attractive working conditions for researchers? | x | x | x | ++ Yes completely | iBET integrates three PhD Programs, that together structured doctoral programs designed to ensure academic excellence and successful completion of studies. Each program offers close supervision and a well-defined agenda, fostering high-quality research and innovation. Also, iBET is in compliance with National Regulations regarding the employment of PhD holders, namely only offering temporary contracts to PhD holders up to three years after thesis defense and the total duration of temporary contracts cannot exceed six years. Furthermore, there is a National initiative, the Tenure Contracts program, that aims to stabilize senior researchers in academic and research careers, attract and retain top talent, and promote staff rejuvenation and enhancing institutional competitiveness. iBET also has implemented a comprehensive Career Progression Plan, that ensures structured professional development and long-term stability for researchers. These plans are available for consultation on iBET's intranet. iBET´s currently employs 100 PhD holders under permanent contracts, reinforcing its commitment to research excellence and talent retention. |

| | Open | Transparent | Meritbased | Answer: | Suggested indicators (or form of measurement) |
|---|---|---|---|---|---|
| Do we have means to monitor whether the most suitable researchers apply? | | | | +/- Yes substantially | At iBET there are no defined means, but the offered positions for research staff and technicians funded by research projects/grants are rarely vacant. In all cases, there is a limit of points which are not exceeded by the candidate, the applicant is rejected. During the interview process, the Lab Heads, through their knowledge of the field of research and professional network can have a good assessment of whether they obtained the most suitable applicant for vacant position. As such, iBET reserves the right not to proceed with the recruitment process in the absence of candidate(s) with the appropriate profile. Initiative: Monitor the number of positions filled compared to the number of positions advertised |
| Advertising and application phase | | | | | |
| Do we have clear guidelines or templates (e.g., EURAXESS) for advertising positions? | x | x | | ++ Yes completely | At iBET there are templates for the different types of recruitment that are aligned with the national legislation and with Euraxess. Those templates are available to all collaborators through the intranet. All job ads are also assessed by the trained HR personnel to ensure compliance before publication. |

| | Open | Transparent | Meritbased | Answer: | Suggested indicators (or form of measurement) |
|---|---|---|---|---|---|
| Do we include in the job advertisement references/links to all the elements foreseen in the relevant section of the toolkit? | x | x | | +/- Yes substantially | At the moment, information on career and professional development opportunities and relevant policies are not sufficiently described in iBET job announcement. This is an improvement point to iBET which is described in the Action Plan. Once iBET's OTMR Policy is published on the website, this will be linked to iBET job advertisements. |
| Do we make full use of EURAXESS to ensure our research vacancies reach a wider audience? | x | x | | ++ Yes completely | All iBET's job advertisements are published in Euraxess to allow reaching a wider audience. |
| Do we make use of other job advertising tools? | x | x | | ++ Yes completely | As mentioned above, all iBET's job advertisements are published in different platforms such as iBET's website, LinkedIn, and Euraxess. Depending on the contract typology, there is a legal obligation to fulfill certain publication criteria, such as publishing the job advertisement in a public newspaper in addition to the platforms previously described. |

| | Open | Transparent | Meritbased | Answer: | Suggested indicators (or form of measurement) |
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| Do we keep the administrative burden to a minimum for the candidate? | x | | | ++ Yes completely | The administrative process is all digital (information by the candidate is submitted via email). Candidates are only requested to submit a digital copy of supporting documentation that is strictly limited to ensure a fair, transparent and merit-based selection. The candidates are not required to submit physical information about their previous work experience. This documentation is only requested after the appointment phase. During the interview phase there is format flexibility and can be in-person or online, which further reduces time spent in connection with this. |
| Selection and evaluation phase | | | | | |
| Do we have clear rules governing the appointment of selection committees? | | x | x | ++ Yes completely | iBET has clear rules governing the appointment of the selection committees, and the authority to appoint the selection committee is delegated to the responsible Lab Head. All job advertisements, which include the appointment of the selection committees, are validated by the Institute Executive Committee before publication. |

| | Open | Transparent | Meritbased | Answer: | Suggested indicators (or form of measurement) |
|---|---|---|---|---|---|
| Do we have clear rules concerning the composition of selection committees? | | x | x | ++ Yes completely | iBET has clear rule for the composition of the selection committees, which are stated in the internal guideline (Hiring of Employees - S.013, available on the intranet) and further mentioned in the OTMR Policy that will be publicly available on iBET's website. These guidelines are in line with the national legislation, where all members of the selection committee have to have a PhD degree. |
| Are the committees sufficiently gender-balanced? | | x | x | -/+ Yes partially | iBET is not always able to apply the parity criteria in the composition of the selection committee, as it is privilege that the committee as a whole should have all the relevant experience, qualifications and competences to properly assess the candidate. Initiative: Introduce the parity criteria in the composition of the selection committee. Indicator: Number of selection committees with parity higher than 65%. |

| | Open | Transparent | Meritbased | Answer: | Suggested indicators (or form of measurement) |
|---|---|---|---|---|---|
| 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 substantially | The candidates' assessment is carried out according to the established scales published in the job advertisement. However, iBET believes that there are opportunities for improvement regarding the training of senior scientists and lab heads. This is relevant point considered in the proposed Action Plan to organize periodic training sessions. Initiative: Organization of specific training program, with periodic sessions, to recognize and assess a wider range of skills and competences, including creativity, independence and management. While reinforcing this information on the internal guidelines (Hiring of Employees S.013) available on the intranet. Indicator: Number of training sessions and percentage of trainees. |
| Appointment phase | | | | | |

| | Open | Transparent | Meritbased | Answer: | Suggested indicators (or form of measurement) |
|---|---|---|---|---|---|
| Do we inform all applicants at the end of the selection process? | | x | | -/+ Yes partially | The successful candidate is informed firstly through personal contact, followed by an official email. The results for the remaining candidates are published on iBET website, on the job advertisement page under each specific call/position, as required by national legislation. (example: https://www.ibet.pt/careers/job-offers/internal/research-technician-cell-line-dev-molecular-virology/). However, the communication process could be further improved by having a clear identification of the call's state on iBET website. Initiative: Revise call tags on the website to ensure a clear communication of the call state (e.g. open, under selection process, position fulfilled). Indicator: Process implemented during 2027 |

| | Open | Transparent | Meritbased | Answer: | Suggested indicators (or form of measurement) |
|---|---|---|---|---|---|
| Do we provide adequate feedback to interviewees? | | x | | +/- Yes substantially | In the publication of the results, a detailed assessment of the scores in each category is provided. Selected candidates for interviews are duly informed via phone call, followed by an informative email containing details such as date, time, place and interview format (in person or online). Depending on the position, selected candidates for the interview stage receive feedback after the appointment phase. Initiative: Establish as standard procedure to provide feedback via email sent by the HR team on behalf of the PI/Lab Head. Reinforce the need for feedback during training sessions planned on the Action Plan. Indicator: number of training sessions on feedback per year and monitor feedback email trends. |
| Do we have an appropriate complaints mechanism in place? | | x | | +/- Yes substantially | According to the national legislation for public funding positions, candidates have the right to fill in a complaint regarding the appointment results within ten working days. For this purpose, the complainant can send an email to jobs@ibet.pt. Initiative: Create a clear procedure to manage complaints by the candidate and the response time from iBET. Indicator: Monitor complaint trends. |
| Overall assessment | | | | | |

| | Open | Transparent | Meritbased | Answer: | Suggested indicators (or form of measurement) |
|---|---|---|---|---|---|
| Do we have a system in place to assess whether OTM-R delivers on its objectives? | | | | +/- Yes substantially | At iBET the values stated in the OTM-R policy are embedded in iBET policies and procedures, by promoting a transparent, open and merit-based recruitment of the most suitable candidate irrespective of nationality, age, disability, ethnic origin, religion, sexual orientation, or socioeconomic background. Further monitoring of proper application of this policy will be assessed via quality continuous improvement tools. Initiative: Include this assessment in iBET internal audits. |