

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

1. Introduction

The Institute of Social Sciences of the University of Lisbon (ICS-ULisboa) is a School of the University of Lisbon dedicated to advanced research in the social sciences and humanities and to the specialised training of researchers. The mission of ICS-ULisboa is to produce innovative research of international scope and global relevance, addressing the multifaceted challenges of contemporary societies and the Portuguese context, in articulation with broader historical, cultural and geographical relations.

The scientific community of ICS-ULisboa includes researchers at all career stages (R1–R4), research fellows, doctoral candidates, postdoctoral researchers, and researchers employed under project-based contracts or integrated into the scientific research career of the University of Lisbon. As a strongly research-oriented institution, ICS values diverse trajectories and promotes equitable conditions for career development, knowledge production and knowledge sharing.

ICS-ULisboa endorses the principles of the **European Charter for Researchers and the Code of Conduct for the Recruitment of Researchers**, as well as those of **CoARA — the Coalition for Advancing Research Assessment** — reaffirming its commitment to recruitment, evaluation and career practices that foster quality, integrity, plurality of trajectories and institutional responsibility.

2. General Principles: Open, Transparent and Merit-based Recruitment

Recruitment and selection procedures at ICS-ULisboa fully comply with legal requirements and follow the core principles of the **Open, Transparent and Merit-based Recruitment (OTM-R) Policy**, ensuring fair and equal treatment for all applications.

Within this framework, and with the aim of adopting human resources practices that strengthen the attractiveness of research careers and promote fair and responsible working conditions and professional development, ICS-ULisboa is committed to ensuring:

- open and widely disseminated recruitment processes;
- clear, public and consistently applied evaluation criteria;
- well-founded decisions communicated transparently;
- recognition of diverse career paths and contributions;
- fair, contextualised evaluation based on the quality and relevance of scientific and professional merit.

ICS-ULisboa actively promotes **equality, diversity and inclusion**, ensuring equitable access to scientific employment and career progression, in accordance with Article 9(h) of the Portuguese Constitution.

Accordingly, ICS-ULisboa acts diligently to prevent and eliminate any form of discrimination, adopting inclusive language and practices that value individual and collective diversity.

No applicant may be privileged, advantaged, disadvantaged or deprived of any rights or opportunities based on, among other factors: ancestry, age, gender identity, gender expression, sexual orientation, marital status, family situation, economic condition, education, social origin or status, genetic characteristics, reduced work capacity, disability, chronic illness, nationality, ethnic or racial origin, territory of origin, language, religion, political or ideological beliefs, or trade union membership.

This principle derives from the **Labour Code and the Statute of the Scientific Research Career (ECIC)**, which establishes the prohibition of discrimination and the obligation to ensure equal opportunities in access to scientific employment and careers.

ICS-ULisboa further reinforces these principles through the internal document [“Guarantees of Impartiality in the Recruitment of Researchers”](#) (approved by the Scientific Council on 11 April 2024), which defines rules to ensure impartiality and prevent conflicts of interest in the composition of selection committees.

ICS-ULisboa also has specific institutional mechanisms that reinforce these principles and ensure conditions of equality, integrity and protection:

- Gender Equality Committee (contact: CIG@ics.ulisboa.pt)
- Ombuds Office ([access available here](#))
- Whistleblowing Channel ([access available here](#))

In accordance with the guidelines of the University of Lisbon and the principles of CoARA, ICS-ULisboa adopts a broad, rigorous and contextualised understanding of merit. The evaluation of scientific careers recognises the diversity of contributions and outcomes, prioritising the quality, relevance and integrity of academic trajectories. Merit includes scientific output in its multiple forms and corresponding impact, open science practices, collaborative contributions, methodological innovation, social impact, academic leadership, participation in international networks, as well as teaching, mentoring and outreach activities. Institutional contexts, career interruptions, interdisciplinary contributions and other forms of work essential to the scientific vitality of the institution are also taken into account.

As an institute of social sciences, characterised by different demands, practices, methodologies and disciplinary rhythms, ICS-ULisboa emphasises that merit assessment must reflect the diversity of ways of conducting research and the plurality of contributions that make scientific activity possible and socially relevant.

Accordingly, emphasis is placed on an evaluation that carefully combines qualitative and quantitative indicators, always ensuring contextualised assessment and rejecting simplistic or exclusively numerical metrics.

3. Open Recruitment

The **principle of openness** requires that recruitment procedures at ICS-ULisboa be widely publicised and accessible to the international scientific community. This principle is enshrined in the relevant legislation, which establishes that all recruitment procedures must, by definition, be publicly advertised and international in scope.

ICS publishes recruitment advertisements through different platforms and communication channels, depending on the nature and profile of the position. All opportunities are advertised on the **ICS-ULisboa institutional website** and, where applicable, on the **University of Lisbon website**, the **Public Employment Platform (BEP)**, and the **EURAXESS portal**, ensuring national and international visibility. Where appropriate, advertisements may also be disseminated through scientific networks, specialised mailing lists, academic associations and other relevant platforms in the social sciences and humanities, in order to reach a broader and more diverse pool of potential applicants.

In accordance with the Labour Code, recruitment advertisements may not contain, directly or indirectly, any restrictions, specifications or preferences based on gender. ICS-ULisboa therefore adopts neutral and inclusive language in all recruitment communications and upholds values requiring that all recruitment processes comply with the principle of non-discrimination.

Advertisements are drafted in Portuguese and English, using clear and inclusive language, and include comprehensive information on the role, requirements, evaluation criteria and weighting, deadlines, required documentation, composition of the selection committee, and mechanisms for hearing and appeal. For scientific career recruitment procedures, the call must remain open for a minimum of **30 working days**, ensuring adequate time for the preparation and submission of applications.

In the specific case of R1 researchers recruited through research fellowships, all vacancies are also advertised openly and competitively, applying the same principles of equality, diversity and inclusion. Selection may not be restricted to individuals already involved in the project, unless expressly required by the funding body.

4. Transparent Recruitment

The **principle of transparency** requires clarity at all stages of the recruitment process, including the characteristics of the position, evaluation criteria and selection outcomes. Information relating to all stages of the recruitment process is publicly disclosed on the ICS-ULisboa website, under the *Calls for Applications* section.

This principle is also enshrined in general legislation and further specified in the strategic guidelines and regulations in force at ICS-ULisboa, namely the document “[Guarantees of Impartiality in the Recruitment of Researchers](#)”.

ICS-ULisboa is distinguished by particularly demanding criteria in the composition of selection committees for scientific career recruitment. Committees are predominantly composed of members external to the University of Lisbon, preferably including international researchers, ensuring diversity of perspectives, independence and mitigation of bias. Where possible, gender balance and scientific adequacy to the scope of the call are ensured. In parallel, ICS-ULisboa promotes rotation in the composition of committees, in order to strengthen transparency, avoid concentration of evaluative power, ensure diversity of trajectories and guarantee plural and balanced assessment.

ICS-ULisboa ensures that all recruitment procedures are conducted clearly, accessibly and verifiably, in compliance with national legislation governing scientific research careers and the University of Lisbon's regulations. Recruitment procedures for the scientific research career (Assistant Researchers, Principal Researchers and Research Professors) always include the public and international disclosure of the legal framework, evaluation criteria and methods, committee composition, deadlines and appeal mechanisms. This ensures equal opportunities and traceability of all stages.

Calls for applications are always public and include the number of positions, employment modality, professional category, disciplinary area(s), composition of the committee, admission requirements, required degree/title, absolute and relative merit criteria, application procedures and deadlines, required documentation, and the possibility of electronic submission or submission in another language.

For fixed-term contracts associated with research projects, although subject to different legal frameworks, ICS-ULisboa applies the same principles of transparency and equity: advertisements clearly state the required profile, contract duration, selection criteria and application instructions, and use inclusive language. In all cases, lists of admitted and excluded candidates are published, decisions are duly justified, rights to hearing and appeal are ensured, and final results are formally communicated.

In the case of research fellowships, regulated by specific rules, ICS-ULisboa likewise applies the principles of openness, transparency and non-discrimination, ensuring clear disclosure of evaluation criteria, proper documentation of procedures and fair and accessible communication of results.

5. Merit-based Recruitment

The evaluation of applications at ICS-ULisboa follows principles of rigour, impartiality and suitability to the profile of the position, based at all times on previously defined and publicly disclosed criteria.

In recruitment procedures for the scientific research career, governed by national legislation (namely the Statute of the Scientific Research Career), ICS-ULisboa fully complies with legal requirements: selection committees are composed of qualified members, including external and, where possible, international members, ensuring diversity of perspectives, mitigation of bias, independence of assessment and rotation among committee members. All members must declare potential conflicts of interest, and all stages of the procedure are documented in minutes and publicly verifiable. Committees are proposed by the Scientific Council of the School and consist of between five and nine members, the majority external to the University of Lisbon, all from the relevant disciplinary field, plus the Director of ICS-ULisboa.

Evaluation takes place in three stages: verification of eligibility; assessment of absolute merit (admission); and assessment of relative merit (ranking), always duly reasoned and transparent.

In selection procedures for fixed-term contracts or research fellowships, ICS-ULisboa applies the principles of merit, transparency and non-discrimination to the maximum extent permitted by the applicable legal frameworks, such as those of funding bodies like the FCT, the European Commission and other programmes. This includes clearly disclosing requirements and criteria, identifying the selection committee, making reasoned decisions and respecting applicants' rights to a hearing and an appeal.

In all cases, merit assessment is contextualised and proportional to the profile of the role, valuing the quality and diversity of scientific experience — including interdisciplinary contributions, fieldwork, teaching, supervision, scientific management, outreach activities and duly justified career interruptions. Final decisions are communicated to all applicants and published on the relevant institutional platforms.

These practices reinforce trust in the recruitment system, ensure fairness and equal opportunities, and guarantee that ICS-ULisboa responsibly selects individuals whose trajectories and contributions best match the institution's scientific needs.

6. Final Considerations

The general principles and concrete recruitment and selection procedures in place at ICS-ULisboa comply with the requirements of general legislation, align with the practices of leading European and global universities, and broadly meet the standards set out in the European Charter for Researchers.

Nevertheless, ICS recognises that this policy is subject to improvement and may not necessarily reflect fully consolidated practices. As in other functional areas, recruitment and selection practices should be guided by the principle of continuous improvement.

Accordingly, regular monitoring activities should be developed through the collection, by Human Resources, of data on recruitment procedures and the preparation of an annual report enabling the evaluation of practices, identification of areas for

improvement and verification of compliance with OTM-R principles. The Strategic Plan itself includes objectives, indicators and targets in this area that should be regularly monitored. The aim is to contribute to the refinement of OTM-R principles and rules and to the recognition of the quality of human resources practices across the entire community.