HR Excellence in Research

OTM-R Checklist

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Case number

2025PT382359

Name Organisation under review

Instituto de Geografia e Ordenamento do Território da Universidade de Lisboa

Organisation’s contact details

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Date endorsement charter and code

18/11/2025

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					
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 available at IGOT's website. URL: https://www.igot.ulisboa.pt/hr-excellence-research
Do we have an internal guide setting out clear OTM-R procedures and practices for all types of positions?	x	x	x	-/+ Yes partially	The General Regulations of Calls for the recruitment of full, associate and assistant professors of the University of Lisbon, as approved by the Rector's Order of February 16th, 2015, published in Diário da Republica, 2nd series, No. 45 of March 5th.

	Open	Transparent	Meritbased	Answer:	Suggested indicators (or form of measurement)
Is everyone involved in the process sufficiently trained in the area of OTM-R?	x	x	x	-/+ Yes partially	There is no specific training program regarding practices for the selection and onboarding of international researchers. The staff within the Human Resources and Administrative Unit are responsible for managing and executing recruitment and selection processes—including the announcement and dissemination of job openings, process coordination, providing secretarial support for jury meetings, reviewing and processing applications, communicating final results, and formalizing appointments, in accordance with applicable legislation and internal regulations—yet they have not received specialized training for this purpose. It is the responsibility of senior researchers to facilitate the onboarding, training, and evaluation of international researchers.
Do we make (sufficient) use of e-recruitment tools?	x	x		-- No	Candidates can submit their applications in person or by registered postal mail. IGOT-ULisboa has planned the development of a platform for the submission of applications. If this option proves impractical, it will be possible to use the platform that is being developed by the Rectorate services of the University of Lisbon.

	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	-- No	Quality control is based on the management of recruitment and selection processes, carried out by the Human Resources and Administrative Affairs Unit in strict compliance with applicable legislation and regulations (specifically those of the University of Lisbon). The Implementation Committee of IGOT's application to the HR Excellence in Research award is implementing a monitoring system.
Does our current OTM-R policy encourage external candidates to apply?	x	x	x	+/- Yes substantially	All job postings are published transparently in Portuguese and English through the IGOT-ULisboa institutional website, the EURAXESS portal, the Public Employment Exchange (Portugal | BEP - PT), the Diário da República (PT), and national newspapers, in accordance with current legislation.
Is our current OTM-R policy in line with policies to attract researchers from abroad?	x	x	x	+/- Yes substantially	There are no programs specifically aimed at attracting foreign researchers, but IGOT OTM-R policy, published in Portuguese and English, clearly outlines its open recruitment policies and compliance with the rule of non-discrimination.
Is our current OTM-R policy in line with policies to attract underrepresented groups?	x	x	x	+/- Yes substantially	IGOT-ULisboa guarantees equal opportunities in access to work. Therefore, it scrupulously complies with national legislation, namely Joint Order No. 373/2000, of March 31st.

	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 substantially	IGOT-ULisboa ensures attractive working conditions for its faculty and researchers by offering career advancement opportunities through a mandatory, periodic performance evaluation process, as well as regular promotion competitions. These measures aim to expand the number of senior-level academic positions—with the combined total of full professors and associate professors intended to represent between 50% and 70% of the faculty, in accordance with the University Teaching Career Statute (ECDU). The institution fosters collaboration with other universities and organizations, notably by granting faculty members relief from teaching duties to participate in research or outreach projects for specified periods. It also promotes funded mobility programs (such as Erasmus+ and FCT Mobility). Furthermore, it provides job security for full and associate professors through a "tenure" system. Additionally, it ensures access to campus libraries, electronic resources, training events, remote work options, childcare facilities, sports amenities, dining services, and healthcare (provided through the University of Lisbon’s Social Action Services).

	Open	Transparent	Meritbased	Answer:	Suggested indicators (or form of measurement)
Do we have means to monitor whether the most suitable researchers apply?				+/- Yes substantially	The calls for applications, which outline the profile sought in candidates/researchers, are published on both national and international portals. This ensures broad dissemination of the information, thereby reaching a wide range of potential candidates—including those who best fit the defined profile. Mandatory requirements are established based on the specific needs of the project or the institution. While there is no formal mechanism to monitor the suitability of candidates, it is worth noting that 92.5% of all applicants were deemed qualified based on absolute merit. Furthermore, the high success rate of professors and researchers in completing their probationary period confirms that the individuals who apply for positions at IGOT-ULisboa possess the desired profile.
Advertising and application phase					
Do we have clear guidelines or templates (e.g., EURAXESS) for advertising positions?	x	x		++ Yes completely	IGOT has developed templates, following the requirements described in the Statute of the University Teaching Career, the Statute of the Scientific Research Career and the General Regulation for Recruitment Procedures of Full, Associate and Assistant Professors of the University of Lisbon.

	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	Although we do not yet have the toolkit, the job postings contain all the pertinent, required, and necessary information for a candidate to successfully submit an application. However, while all the relevant information is available, it is not organized in the most appropriate way, nor is it easy to use.
Do we make full use of EURAXESS to ensure our research vacancies reach a wider audience?	x	x		++ Yes completely	All vacancies are posted on EURAXESS, with the exception of internal career progress merit-based competitions under the Decree-Law 112/2021. 12,5% of the candidates to IGOT in 2024-2025 period were of foreign nationality, which to some extent demonstrates the openness of the recruitment process.
Do we make use of other job advertising tools?	x	x		++ Yes completely	All vacancies are also advertised on the IGOT-ULisboa institutional website, the Public Employment Exchange (Portugal | BEP - PT), the Diário da República (PT), and national newspapers. https://www.bep.gov.pt/; https://diariodarepublica.pt/ https://www.igot.ulisboa.pt/recrutamento

	Open	Transparent	Meritbased	Answer:	Suggested indicators (or form of measurement)
Do we keep the administrative burden to a minimum for the candidate?	x			-/+ Yes partially	Although candidates are currently only able to submit their applications in person or via registered mail, IGOT-ULisboa intends to use the application submission platform that is currently under development by the Rectorate services of the University of Lisbon.
Selection and evaluation phase					
Do we have clear rules governing the appointment of selection committees?		x	x	+/- Yes substantially	The appointment of the jury for competitions for teaching and research positions is regulated by national legislation, namely: Article 45 of the Statute of the University Teaching Career (2009), with the amendments and additions governing the appointment of the examination boards (PT); Article 13 of the General Regulations for Competitions for the recruitment of full professors, associate professors and assistant professors at the University of Lisbon, which defines the appointment of the examination board (PT); and Article 12 of the Statute of the Scientific Research Career, which establishes the appointment of the examination boards (PT).

	Open	Transparent	Meritbased	Answer:	Suggested indicators (or form of measurement)
Do we have clear rules concerning the composition of selection committees?		x	x	+/- Yes substantially	The composition of the jury for competitions for teaching and research positions is regulated by national legislation, namely: Article 46 of the Statute of the University Teaching Career (2009), with the amendments and additions governing the composition of the examination boards (PT); Article 14 of the General Regulations for Competitions for the recruitment of full professors, associate professors and assistant professors at the University of Lisbon, which defines the composition of the examination board (PT); and Article 12 of the Statute of the Scientific Research Career, which establishes the composition of the examination boards (PT).
Are the committees sufficiently gender-balanced?		x	x	++ Yes completely	At IGOT-ULisboa, gender balance is promoted, although it is at times challenging to achieve due to the gender imbalance that exists among all professors and researchers.

	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 completely	The notice for applications for the recruitment of professors and researchers specify the criteria to be evaluated by the jury (absolute merit and relative merit), for example: a. Curriculum vitae of the candidate mandatorily structured according to the defined criteria – in the areas of Scientific Performance, Pedagogical Capacity and Other activities relevant to the mission of the higher education institution that have been developed by the candidate –, taking into account the assessment parameters set out in the Notice, and that is considered relevant for the Higher Education Institution and for the subject area in which the call is opened. b. Publications/works mentioned by the candidate in the curriculum vitae as most representative. This selection must be accompanied by a brief justification, as well as an indication of the candidate's contribution in the case of co-authored publications; c. Scientific-pedagogical project.
Appointment phase					
Do we inform all applicants at the end of the selection process?		x		++ Yes completely	All candidates are beformally notified of the outcome by e-mail (proof of delivery and read receipt is requested).

	Open	Transparent	Meritbased	Answer:	Suggested indicators (or form of measurement)
Do we provide adequate feedback to interviewees?		x		+/- Yes substantially	Candidates who are excluded, not admitted on absolute merit, and ranked in a position that makes them unsuitable for hiring are notified electronically by e-mail, so they may respond within ten (10) working days. All candidates (admitted and excluded) are also informed of the approval of the competition results by electronic notification (by e-mail). This procedure is in compliance with current legislation.
Do we have an appropriate complaints mechanism in place?		x		++ Yes completely	Under the terms of the Administrative Procedure Code, candidates have ten (10) working days to submit a complaint. If complaints are received, the jury is obliged to respond. National legislation guarantees candidates the right to appeal and to request access to official documents (e.g., minutes of jury meetings and statements justifying the ranking of candidates). Access includes consulting the documentation of other candidates, provided that personal data and sensitive information are omitted. For informational purposes, 5% of the candidates admitted to recruitment competitions for professors and researchers submitted comments during the preliminary hearing stage in the 2024–2025 period.
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?				-- No	The Implementation Committee of IGOT's application to the HR Excellence in Research award is implementing a monitoring system, which is described in the Action Plan.