OTM-R (Open Transparent Merit-based Recruitment) in a nutshell

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WHAT IS OTM-R?

OTM-R is one of the pillars of the **European Charter for Researchers** and in particular of the **Code of Conduct for the Recruitment of Researchers**, launched in 2005.

- **OPEN**: Institutions must advertise positions openly and widely in order to reach the widest pool of candidates
- **TRANSPARENT**: Recruitment process must be simple and clear. External candidates must have access to the same information as internal candidates
- **MERIT-BASED**: selection must be based on researchers' merit: the best possible candidate gets the job

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WHY OTM-R? 1.

- OTM-R ensures equal opportunities for all candidates and facilitates mobility.

- Ensures that all recruitment procedures are based on principles of equal opportunities for all candidates (including internal and external).

- Ensures that the best person for the job is recruited.

In sum: an OTM-R system brings benefits to researchers, institutions and the country's research system, and contributes to the full implementation of the ERA.

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WHY OTM-R? 2.

OTM-R is a fairer system and has a positive impact on:

- International mobility
- Attractiveness of a research career in EU
- Equal access to job opportunities for men and women

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When is a recruitment process OPEN?

- A recruitment process can be considered OPEN when it **encourages external candidates to apply and also attracts researchers from abroad.**

In concrete, applicants should be able to easily find information on:
- *organisation and recruiting unit*
- *job title, specifications and starting date*
- *researcher career profiles (R1-R4) with the respective 'required' and 'desirable' competencies*
- *selection criteria including knowledge and professional experience (distinguishing 'required'*
- *and 'desirable')*
- *number of available positions*
- *working conditions, workplace, entitlements (salary, other benefits, etc.), type of contract*
- *professional development opportunities*
- *career development prospects*

When is a recruitment process OPEN and TRANSPARENT? 1.

The **INSTITUTIONAL PROCESS** can be considered **OPEN and TRANSPARENT** when it includes:

- a publicly accessible **institutional recruitment policy**;
- **institutional recruitment regulations** which are clear to applicants & reviewers;
- a system to regularly **check, review and revise** recruitment regulations;
- a serious mechanism to deal with **complaints**.

Examples:

- *Differentiation between internal promotions and new recruitment*
- *No fake vacancies for internal promotions as open positions*
- *No reservations of open positions for internal candidates*

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When is a recruitment process OPEN and TRANSPARENT? 2.

The **APPLICATION PHASE** can be considered OPEN and TRANSPARENT when:

- advertisement uses the **R1-R2-R3-R4 framework terms**;
- interested candidates and applicants receive all **the relevant information**;
- **administrative burden** is minimal for the candidates but also for the selection committees.

Example

Candidates unfamiliar with the 'local system' must be able to assess the attractiveness of a position and to fully understand the application procedure.

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When is a recruitment process TRANSPARENT?

The SELECTION PHASE can be considered TRANSPARENT when:

- the selection panel composition is objective & made public;
- the communication with candidates/applicants (acknowledgement feedback) is timely and appropriate.

> *Example*
> *The process of nominating and appointing the selection committee guarantees a diversity of members, balancing internal and external experts, bringing in competency and objectivity.*

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When is a recruitment process BASED on MERIT? 1.

- While an absolute and universally acceptable definition of 'merit' is virtually impossible to achieve, the EC WG agrees that **a recruitment system can be considered merit-based when it is able to ensure that the institution recruits the best person for the job**

- The application of the **European Framework for Research Career,** which identifies both **required** and desirable competences for each profile (R1 to R4), may substantially help research institutions willing to adopt a genuine OTM-R system.

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When is a recruitment process BASED on MERIT? 2.

When the selection committee:

- is established for all profiles (R1-R4)

- is adequate for the profile, in terms of size and composition

- is independent, objective, and takes evidence-based decisions

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Examples
- *inclusion of*
  - *o external experts (outside the institution),*
  - *o international experts,*
  - *o experts from different sectors*
- *relevant experience, qualifications and competencies of members to assess each candidate*

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When is a recruitment process BASED on MERIT? 3.

When the criteria for selecting researchers

• foresee appropriate assessment and evaluation of a wide spectrum of qualifications (encompassing non-formal qualifications, skills and competences, international portfolio);

• are focused on **past performance and future potential**, with a different respective weight according to the profile (R1-R4);

• are consistent with the requirements of the position;

• combine **qualitative and quantitative** judgment, focusing on results within a diversified career path

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When is a recruitment process BASED on MERIT? 4.

Examples

A wide range of evaluation criteria should be used and balanced, according to the position and the specific profile of the post; these criteria may include:

> *o acquisition of funding;*
> *o generation of societal impact;*
> *o international portfolio (including mobility);*
> *o knowledge transfer and exchange;*
> *o management of research and innovation;*
> *o organizational skills/experience;*
> *o outreach/public awareness activities;*
> *o research performance;*
> *o supervision and mentoring;*
> *o teaching;*
> *o teamwork*

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What should an OTM-R system look like?

It should :

- be based on a **review** of the current OTM-R policy, practices and procedures (i.e. OTM-R system)

- foresee the **publication** of the (revised) OTM-R system

- establish/adapt an 'OTM-R guide', on which to **train** (and raise awareness of) the personnel

- be embedded into the institutional **Quality Control** System

- consider to develop and incorporate an **e-recruitment** tool.

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OTM-R Quality Control

To assess whether an OTM-R system genuinely works as such, it should be consistently monitored by an efficient and effective Quality Control mechanism.

Examples
- *periodical, external review by independent observers*
- *forms for internal reporting on all phases of the recruitment process*
- *means to assess whether the OTM-R system delivers on its objectives*

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Disclaimer

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