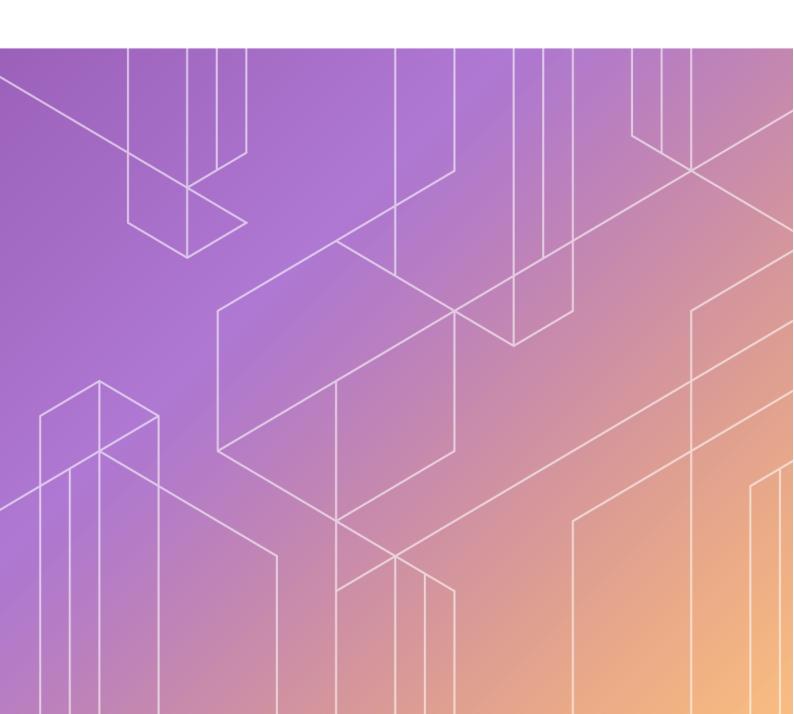


### **R&D Units Evaluation 2023/2024**

### Registration And Application Guide

January 2024



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### I. Introduction

The R&D Units constitute the basis of the organization of the Portuguese Science and Technology System, contributing to the development and the promotion of knowledge in all areas, its strengthening and territorial densification, as well as towards the integration of Portugal in Europe and the international recognition and valorization of the national scientific capacity.

R&D Units must, therefore, gather a critical mass appropriate to their mission and promote working environments that encourage scientific creativity, promotion of talent and development of skills and scientific careers, ensuring that researchers have adequate conditions for carrying out research projects and for the development of their careers. Whenever appropriate, R&D Units must also bring together interdisciplinary and multidisciplinary human and technical resources to respond to complex problems, particularly those related to the challenges society faces.

The R&D Units candidate for the 2023-2024 evaluation exercise may be R&D Units funded by FCT in the current period or result from a reorganization (including merging or extinction) of these Units, or may be new Units that are now undergoing evaluation for the first time.

This Guide provides information on preparing the application for evaluation under the Pluriannual Program for the Funding of R&D Units 2023/2024 and on the structure of the respective online form that will be made available on the <u>Portal de Ciência e Tecnologia (PCT)</u>, as announced in the Call for Applications Notice.

Preparing the application involves three phases:

- 1. Registration of R&D Units (from January 8 to January 17, 2024)
- 2. Registration of research teams (from January 18, 2024 to February 19, 2024)
- 3. R&D Unit's application (from February 20, 2024 to March 25, 2024)

The phases are sequential, and to move to the next phase, the previous forms must be submitted.

FCT recommends that the preparation of team registration begins as soon as possible, namely by consolidating research teams, and gathering elements to facilitate filling out the online form that will be made available in phase 2.

The Regulation of the Pluriannual Program for the Funding of R&D Units 2023/2024, as well as the remaining call documents, are available <u>here</u>, on the FCT website.

### II. Questions prior to application submission

### 1. Who can submit an R&D Unit application?

The application for an R&D Unit must be submitted by its coordinator and involves completing the **Online Application Form** in English (except when indicated in Portuguese).

The form will be made available to the coordinator of the R&D Unit at <u>PCT</u> by entering the respective CIÊNCIA ID credentials (CIÊNCIA ID identifier and keyword).

An R&D Unit coordinator cannot submit more than one application.

### 2. Who can belong to an R&D Unit?

Integrated PhD holder researchers and collaborating researchers may join the team of an R&D Unit, according to the following definitions:

**Integrated PhD holder researcher**: PhD holder researcher with a contract or link with a Portuguese institution and who dedicates a minimum of 20% of working time to research activities in an R&D Unit.

**Collaborating Researcher:** all researchers who do not meet the requirements for Integrated PhD holder researcher.

A researcher can only be integrated into an R&D Unit but can be a collaborator in other R&D Units.

### 3. Eligibility conditions

Each R&D unit must incorporate Integrated PhD holder researchers with a sum of weighting factors equal to or greater than ten, determined in accordance with the terms set out in number 2 of article 13 of the R&D Units Regulation.

# 4. Counting of Integrated PhD holder researchers in R&D Units to calculate Base Funding

For the purpose of calculating the Base Funding, the coordinator of the R&D Unit must classify each Integrated PhD holder researcher into one of the following three categories:

- a) Higher education faculty members and researchers with exclusive or full-time contracts –
   Weighting Factor (WF) = 1
- b) Higher education faculty members and researchers with part-time contracts and excluding those covered by paragraph c) Weighting Factor (WF) = 0.5
- c) Higher education faculty members and researchers with residual dedication to R&D activities, on a weekly average of 20% of their working time Weighting Factor (WF) = 0.2

Integrated PhD holder members, hired in the framework of the mission of Technology and Innovation Centers, Clinical Academic Centers, State Laboratories, or Collaborative Laboratories may be counted according to paragraph c).

### 5. CIÊNCIA ID and CIÊNCIAVITAE

All integrated PhD holder researchers, including the R&D Unit's coordinator, must have <u>CIÊNCIA</u>

<u>ID</u>. This is a national identifier that allows access to various science services. Questions regarding the creation and/or use of CIÊNCIA ID should be sent to the email address <u>suporte@ciencia-id.pt</u>.

Integrated PhD holder researchers belonging to the research team must have a CIÊNCIAVITAE curriculum. The <u>CIÊNCIAVITAE Guide</u> explains how this curriculum is created and the conditions for its use in FCT calls. For the Evaluation Panel to be able to read the researchers' information, it is essential that CIÊNCIAVITAE is in English. **FCT will only have access to CIÊNCIAVITAE data whose access level is semi-public or public.** Questions about CIÊNCIAVITAE should be sent to the email address info@cienciavitae.pt.

#### 6. Narrative CV

Integrated PhD holder researchers whose CV was indicated by the R&D Unit coordinator as a core CV, in addition to updating their CIÊNCIAVITAE, will have to write a Narrative CV. The introduction of the Narrative CV in the current evaluation exercise of the R&D Units, results from FCT's commitment to follow the recommendations established in the Agreement on Reforming Research Assessment established by the Coalition for Advancing Research Assessment (CoARA) and was validated after evaluating the pilot narrative CV recently introduced in the Restart Program.

Taking into account the time needed to prepare the Narrative CV, and given it is a new element of the evaluation, it is advisable that unit coordinators define in advance the researchers whose CV will be core CV. These researchers can prepare in advance their Narrative CV according to the template available in Annex I.

When the unit coordinator adds the team, researchers whose CV was indicated as a core CV will receive an email to confirm them as a member of the team. This confirmation will only be possible after completing the Narrative CV on the platform.

### 7. Preparation for completing the Registration and Application Forms

It is recommended to read the whole Guide before filling out the Registration and Application Forms in order to include the necessary elements.

It is advisable to create a document in a simple text editor with the content that will be then copied to the application form.

The R&D units must ensure that they gather all necessary information from their Integrated PhD holder researchers to facilitate the timely completion of the team registration process.

### 8. How to direct questions to FCT?

All questions, if not answered in the application supporting documents, should be sent by email to <a href="mailto:avalunidades@fct.pt">avalunidades@fct.pt</a>.

FCT does not guarantee a response to emails received in the last two working days of the application submission period, or if emails are sent to an email address different than the indicated above.

### III. Registration of the R&D Units

The R&D Unit coordinator is responsible for filling out the R&D Unit Registration Form, and for establishing the necessary interactions with the institutions and researchers involved.

The access to the R&D Unit Registration Form is done online, in the <u>PCT platform</u>, by entering the coordinator's CIÊNCIA ID credentials. The R&D Unit coordinator may start filling out the registration or change a registration that has already been started. The application reference is assigned automatically and works as a unique identifier of the R&D Unit during the evaluation and until the completion of the activities corresponding to the multi-annual funding period approved.

The R&D Registration Form should be filled in Portuguese, except in explicitly identified fields that must also be completed in English.

#### a. To maintain a R&D Unit

The following reference fields are pre-filled in the Registration Form: designation, name of the coordinator, Main Management Institution and Other Management Institutions (if any) of the R&D Unit. The designation, coordinator name, Main Management Institution and Other Management Institutions fields can be changed.

### b. To create a new R&D Unit by merging two or more R&D Units

In the process of merging two or more R&D Units currently covered by the Multiannual Financing Program for R&D Units, **extinction of the intervening units must not be made**.

The registration of the new R&D Unit must be carried out by the future coordinator. Moreover, one of the coordinators of the merging units must select and confirm the "Merge" option, accessing the new R&D Unit registration form, in which they must select the merging units and indicate the new name of the R&D Unit resulting from the merge, as well as the future coordinator.

The indication in the registration form of the merging R&D Units is made through selecting from the available list of currently funded R&D Units. After confirming the indication of creation of an R&D Unit, the coordinator of the R&D Unit receives a notification by email with instructions to confirm the merge. The "Merge Confirmation" section is then available on the R&D Units registration form. Submission of the R&D Unit registration is only possible after all coordinators of the R&D Units involved in the merge complete the respective confirmations. If the coordinator of the new R&D Unit is one of the coordinators of the merging R&D Units, he/she must also carry out the "Merge Confirmation" relating to the previous R&D Unit.

### c. Extinction of a R&D Unit

Choosing this option gives access to a page for justification (maximum 500 characters) and submission of the R&D Unit's extinction record. Once extinct, a R&D Unit cannot participate in the current evaluation exercise, nor merge with another R&D Unit, but the coordinator and researchers who were part of it are free to integrate other existing or new R&D Units.

### 1. Completing the R&D Unit Registration Form

The fields 01-Reference and 02-Coordinator are pre-filled, the last one can be changed. In the form made available to units that selected the option *to maintain*, there are several other fields with pre-filled information: x-Designation (in Portuguese), x-Main Management Institution and x-Other Management Institutions.

The fields on the R&D Unit registration form are as follows:

#### 1.1. Identification of the R& Unit

**01 Reference:** It is an automatic field, with the code assigned to the R&D Unit.

**02 Coordinator**: Must be a PhD holder researcher integrated into the R&D Unit affiliated with the Main Management Institution of the R&D Unit (Regulation, paragraph d, number 1, article 3). A researcher can only be coordinator of one R&D Unit.

In the R&D Unit registration form, the name of the coordinator is pre-filled in accordance with the CIÊNCIA ID credentials entered when accessing the application. It is possible to change the coordinator by indicating the CIÊNCIA ID of the new coordinator. After this modification, only the new coordinator can access the R&D Unit registration form.

- **03 Designation:** The name of the R&D Unit must be indicated in Portuguese and English, without using acronyms, each with a maximum of 160 characters. If a R&D Unit is registered and its name coincides with the name of another R&D Unit already registered, an alert will show, and the name of the Unit may be altered.
- **04 Acronym:** The acronym for the abbreviation of the name of the R&D Unit must have a maximum of 15 characters. If an R&D Unit registers an acronym that coincides with the acronym of another R&D Unit, an alert will show, allowing changes to be made.
- **05 FOS scientific areas:** This field is for statistical purposes only and corresponds to the FOS (Field of Science and Technology classification of scientific areas from the Frascati manual). In this field, up to 4 scientific areas must be selected, taking into account the main activities of the R&D Unit (Annex II).
- **06 Keywords:** Fill in 6 keywords in Portuguese and English. They must be chosen in order to characterise the scope of activities of the R&D Unit and must be sufficiently specific to clarify the Unit's main thematic lines or areas of research.

#### 1.2. Involved Institutions

**07 Main Management Institution:** The entry in this field of the form should precisely match the legal person identification number (NIPC) and must be chosen from a scroll down menu (facilitated by entering the initial characters of the respective name or NIPC). If the institution is not listed in the form, it is necessary to complete the Pre-registration of Institutions on the PCT. Following this process, the institution should be added to the FCT institutions database. Once validated by FCT, the new institution will be included in the FCT database within an expected

timeframe of two working days. After completing this procedure, it is essential to revisit this field of the registration form, to associate the institution.

If the *to maintain* option has been selected, the Management Institution field is pre-filled, but can be changed.

**08 Other Management Institutions:** This field must only be filled if there are other Management Institutions in addition to the Main Management Institution. If they exist, they must be indicated analogously to section 07.

If the *to maintain* option has been selected, the Other Management Institutions field will be prefilled, but can be changed.

**09 R&D Unit Contacts:** Postal address, telephone number, email.

10 R&D Unit website: Address (URL) of the home page.

#### 1.3. Evaluation Panel

- **11 Selection of the Evaluation Panel**: From the list of Evaluation Panels available on the form (list in Annex III), each R&D Unit must select the Evaluation Panel most appropriate to its scope of activities.
- **12 Multidisciplinary Evaluation (Optional):** The R&D Unit must indicate whether it intends a multidisciplinary evaluation. If so, it must select the "Yes" option and choose a maximum of 2 evaluation panels from the menu.

#### Multidisciplinary Evaluation

In this evaluation exercise, FCT opted for a new multidisciplinary evaluation model, following a bottom-up logic that allows units to be evaluated by committees of readers who integrate specialties from the scientific areas identified by the units. The reader committees for each unit will be made up of 3 evaluators from the main panel and up to 2 additional evaluators from the scientific areas of the other panels selected in point 12. These evaluators will act, for that unit, as full panel members, therefore integrating the committee of readers who will prepare a detailed evaluation proposal for the evaluation panel, participating in all phases of the evaluation process, including visiting the units whenever possible, as well as the discussion meeting and plenary decisions of the panel. Therefore, as a result of the choice made, the units may constitute multiple multidisciplinary evaluation configurations. This is an optional field and it should be noted that the multidisciplinary evaluation will not result in any advantage or bonus for the R&D Unit in tis evaluation process.

**13 Location for the Evaluation Panel visit to the R&D Unit:** The evaluation of the R&D Unit includes the visit of Panel members to the Unit. In this field, the address of the site to visit must be indicated. In the case of R&D Units with more than one hub, the address of the hub to be visited should be indicated.

### 1.4. Laboratory Intensity

**14 Laboratory Intensity Levels** (High, Medium, Low): If medium or high are selected, identify the elements that justify the level of laboratory intensity according to the description. The justification should also clearly state how facilities or infrastructures contribute and are aligned with the research goals and needs of the research unit, as well as demonstrating their relevance regarding the outputs produced and the mission of the unit.

The laboratory intensity level will be validated by the evaluation panels and will be considered for the base funding attributed to the research unit.

Maximum 4000 characters.

LABORATORY INTENSITY LEVELS	LEVEL DESCRIPTION
High [f=1,2]*	R&D unit with equipments and/or laboratories, or that participates in campaigns and/or field activities, that have significant operating and maintenance costs, in relation to the base funding of R&D unit.
Medium [f=1,1]	R&D unit with archives, libraries or platforms for public use, database infrastructures of national and European value and other equipment and laboratories not falling within the previous "high" definition.
Low [f=1,0]	R&D unit lacking significant levels of the aforementioned elements.

<sup>\*</sup>f is the multiplicative factor to be applied in the base funding.

### IV. Registration of the Research Teams of the R&D Units

The research teams of the R&D Units that remain the same, and the R&D Units that result from the merge of other R&D Units are imported from the <u>Plataforma de Atualização Permanente de Equipas</u> on the date the **Team Registration Form** is made available. After this date (January 17, 2024) no team data will be imported, so any changes will have to be introduced in the team registration form which must be sealed by February 19, 2024.

Data relating to confirmed researchers and in the "Active" status will be imported, namely: CIÊNCIA ID; Name; time dedication (%); Level of training; Conclusion year; Integrated; Non-Integrated (collaborator); Link institution/Contractor.

In the Team Registration Form it is possible to change the status of Integrated PhD holder researcher or collaborator, among others. The status of Integrated PhD holder researchers is validated by the system. Retired researchers will only be considered Integrated PhD holder researchers if they have an active professional relationship with a Portuguese institution.

The addition of elements is done by CIÊNCIA ID or email and the CIÊNCIA ID must be registered in myFCT.

All team researchers must be validated by the coordinator on the Team Registration Form, available on the <u>PCT</u>, including the coordinator himself. When an Integrated PhD holder researcher or collaborator is validated, he or she receives an email notification with general instructions, which consists of accepting or rejecting his/her participation in the R&D Unit team. Confirmation in the team is carried out in the <u>PCT</u> by the researcher, by entering the respective CIÊNCIA ID credentials (CIÊNCIA ID identifier and password).

Integrated PhD holder researchers, before completing confirmation, must indicate their ORCID identifier and add CIENCIAVITAE to the application, following the instructions in the <u>CIÊNCIAVITAE</u> <u>Guide</u>. For the Evaluation Panel to be able to read the researchers' information, it is essential that CIÊNCIAVITAE is in English.

Depending on the total number of integrated PhD holder researchers, which includes the coordinator of the R&D Unit, each Unit must indicate, in accordance with the table below, integrated PhD holder researchers with a "Nuclear CV".

Number of Integrated PhD holder Researchers	Number of Nuclear CV
<20	3
≥20 and <40	5
≥40 and <80	10
≥80 and ≤160	15
>160	20

Evaluation panels will have access to CIÊNCIAVITAE for all integrated PhD holder researchers. CIÊNCIAVITAE marked "Nuclear CV" will be subject to special analysis by the panel's members, meaning they must be selected based on the quality, merit, relevance of the contributions and

representativeness of the activity carried out by the R&D Unit. In addition, integrated PhD holder researchers with Nuclear CV have to complete the narrative CV, also in English, in accordance with Annex I. The CIENCIA VITAE CV will be used by the reviewers only as a means of confirmation of the information provided in the Narrative CV.

### V. Application Form for the Evaluation of R&D Units

### 1. List of fields in the Application Form

The application form is organized into 4 parts and 18 sections:

Part 1: Identification of the R&D Unit, Management Institutions, Laboratory Intensity and Participating Institutions (except for section 04 – Involved Institutions, all other sections are prefilled with data from the R&D Unit registration)

- 01 Identification of the R&D Unit
- **02** Evaluation Panel to which the R&D Unit submits the application.
- **03** Laboratory Intensity
- **04** Involved Institutions

# Part 2: Description of the R&D Unit, main contributions of the team of integrated researchers, External Advisory Board and funding in 2018-2023

- **05** Description of the main contributions of the team of Integrated Researchers in the current application
- 06 Reports and External Advisory Board Members (optional for new R&D units)
- **07** Funding during 2018-2023 (optional for new R&D Units)
- **08** Integrated PhD holder researchers, PhD students and research contracts in 2018-2023 (optional for new R&D Units)

Part 3: Research team with links to CVs and ORCID record (all sections are pre-filled with data from the Registration of Research Teams of R&D Units)

**09** Lists of researchers in the current application

### Part 4: Activity Plan for 2025-2029

- 10 Summary of the Activity Plan for 2025-2029
- 11 Description of the Activity Plan for 2025-2029
- **12** Proposed Research Groups (optional and only for units with more than 50 Integrated PhD holder Researchers)
- **13** Thematic Lines (only for R&D Units with more than 100 Integrated PhD holder Researchers, and optional for these)
- 14 Ethical issues
- 15 Aspects of the Activity Plan that involve requesting Programmatic Funding
- **16** Funding planned for 2025-2029 for evaluation purposes.
- 17 Budget justification for 2025-2029
- 18 Members of the future External Advisory Board (mandatory field for all R&D Units)

### 2. Completing the Application Form

# Part 1: Identification of the R&D Unit, Management Institutions, Laboratory Intensity, and Participating Institutions.

All information in this section is pre-filled with data from the R&D Unit registry and cannot be changed, **except section 04 – Involved Institutions** 

#### 04 Involved institutions

The Main Management Institution and the other Management Institutions of the R&D Unit are automatically identified in this section based on the information entered in the R&D Unit registration form:

### 4.1 Main Management Institution

Pre-filled field from the R&D Unit registration

### 4.2 Other(s) Management Institution(s)

Pre-filled fields from the R&D Unit registration

# **4.3 Partnership agreements with other Management Institution(s)** (if there is one other than the main Management Institution)

For each Management Institution other than the Main Management Institution, upload the respective Partnership Agreement with the Management Institution, after filling out the template provided in Annex IV of this Guide, duly signed.

#### 4.4 Participating Institution(s)

To be selected from the list of institutions registered in the FCT's database and available in this field.

### 4.5 Partnership agreements with Participating Institution(s) (if any)

For each Participating Institution, upload the respective Partnership Agreement, after filling out the template provided in Annex V of this Guide, duly signed.

# Part 2: Description of the R&D Unit, main contributions of the team of integrated researchers, External Advisory Board and funding in 2018-2023

# 05 Description of the main contributions of the team of Integrated Researchers in the current application

#### 5.1 General description of the R&D Unit

For the period between January 1, 2018 and December 31, 2023, describe the R&D Unit's, objectives, activities carried out, results obtained, and internal organization. If the R&D Unit did not exist, fill in the areas of activity and results obtained by Integrated PhD holder Researchers registered in the application (**do not list publications here**).

Maximum 4000 characters.

# 5.2 Identification and brief description of up to 5 contributions that the R&D Unit considers to be the most important during 2018-2023 period, from Integrated PhD holder Researchers registered in the current application, independently of the R&D Unit having previously existed or not

For the period between January 1, 2018 and December 31, 2023, describe the contributions of integrated PhD holder researchers registered in the R&D Unit's application (regardless of whether it previously existed or not) considered to be the most relevant. Concerning contributions that are publications, do not just cite the publication, but synthetically describe the contribution and justify why it is considered relevant.

Maximum 10000 characters.

## 5.3 Main publications in 2018-2023 by Integrated PhD holder Researchers registered in the application

For the period between January 1, 2018 and December 31, 2023, a selected set of the most relevant publications, authored by integrated PhD holder researchers should be make available online through an URL specific addresses with the full texts in PDF format. The maximum number of selected publications is defined in the following table:

Integrated PhD holder Researchers	Maximum number of publications to be made available
<20	5
≥20 and <40	10
≥40 and <80	15
≥80 and ≤160	20
>160	25

The selected publications will be analysed in detail by the evaluation panels, meaning that they must be chosen based on the quality, merit, relevance, and representativeness of the scientific activity carried out by the R&D Unit. Therefore, they should not be selected based on any bibliometric indicator but rather in accordance with the framework of the Coalition for Advancing Research Assessment (CoARA) principles and commitments, namely assessing the content and not the publication venue, format or language.<sup>1</sup>

Please note that each link indicated must correspond only to the PDF file of a given publication.

# 5.4 Description of other relevant activities carried out in 2018-2023 by integrated PhD holder researchers registered in the application

(do not include publications or contributions indicated in 5.2 and 5.3)

For the period between January 1, 2018 and December 31, 2023, describe other relevant activities, carried out by integrated PhD holder researchers registered in the application (regardless of whether the R&D Unit previously existed or not), namely: international collaboration; evidence of proactivity in seeking co-financing (applications to other sources of funding, including, for example, European Projects, ERC and Marie Curie grants, Regional Programs, if applicable, Programs from other funding agencies, etc.); advanced training in the unit and in collaboration with other national and international Institutions; scientific training of young students; organization of conferences, colloquia or seminars; patents, prototypes or

<sup>&</sup>lt;sup>1</sup> Please refer to CoARA's Core Commitments, namely, commitment 3, available here.

products; transfer of knowledge and technology; spin-off companies; preservation, curation and dissemination of data and results (as provided for in the Open Science policy); promotion of scientific and technological culture and citizen science; actions of special relevance to society, of a scientific, technological, cultural, artistic, social or economic nature; plans for gender equality and inclusiveness and policy of privacy concerning data management and processing. Include other aspects considered relevant.

Maximum 10000 characters

### 5.5 Explain to what extent the proposed activity plan for the period between 2018-2023 was fulfilled, indicating and justifying any deviations from this plan

In the case of a merge of previous units, present the results for each R&D Unit. This section is not applicable to new R&D Units.

Maximum 4000 characters

### 06 Reports and composition of the External Advisory Board

### 6.1 Reports of the External Advisory Board in 2018-2023 (not applicable for new R&D Units)

Attach one or more PDF files with the External Advisory Board reports for the period between January 1, 2018 and December 31, 2023. In the case of a merge of previous units, submit the reports of the respective External Advisory Boards.

Maximum 5MB per file and 50MB in total files.

### 6.2 Composition of the current External Advisory Board (optional for new R&D Units)

Indicate the most recent composition of the R&D Unit's External Advisory Board. In case of a merge of previous units, indicate the most recent composition of the respective External Advisory Board

For each member of the Board, indicate the name and institution to which they are affiliated, and the country of affiliation of the institution.

In the case of a merge of previous units, for each Board indicate the respective previous R&D Unit.

### 07 Funding in 2018-2023 (optional for new R&D Units)

### 7.1 Annual funding in 2018-2023 (optional for new R&D Units)

For the period between January 1, 2018 and December 31, 2023, indicate the global amounts (in thousands of euros) received from any source, relating to the R&D Unit's research activities separated by funding sources as indicated in the table.

## 08 Integrated PhD holder Researchers, PhD Students and Total Research Contracts in 2018-2023 (optional for new R&D Units)

## 8.1 Integrated PhD holder researchers, PhD students and total research contracts in each year in the period 2018-2023 (optional for new R&D Units)

For the period between January 1, 2018 and December 31, 2023, fill in the table with the numbers of integrated PhD holder researchers, PhD students with theses supervised (ongoing or concluded) by integrated researchers from the R&D Unit, and research contracts. In the case of a merger of previous R&D Units, indicate the respective sums.

# 8.2 Measures implemented in the development of scientific careers (optional for new R&D Units)

Indicate the measures implemented by the R&D unit, and the achieved results, to support and develop scientific careers in their different stages, considering, in particular, efforts made to integrate researchers into permanent career positions. It should also include training and development, coaching and mentoring opportunities provided by the R&D unit to researchers, in particular, early career researchers.

Maximum 4000 characters.

### Part 3: Research team with links to CVs and ORCID registry

All information in this section is pre-filled with the data previously confirmed in the Team Registration menu and therefore cannot be changed.

### 09 List of researchers in the application

### 9.1 List of Integrated PhD holder Researchers in the R&D Unit

List with the names of integrated PhD holder researchers, with CIÊNCIA ID, link to CIÊNCIAVITAE, ORCID and time dedication (%).

### 9.2 List of Collaborating Researchers of the R&D Unit

List with the names of the Collaborating Researchers of the R&D Unit.

# **9.3 List of PhD students supervised by integrated PhD holder researchers in the R&D Unit** List with PhD students supervised by integrated PhD holder researchers from the R&D unit.

#### Part 4: Activity Plan for 2025-2029

### 10 Summary of the Activity Plan for 2025-2029

### 10.1 Summary in Portuguese for publication

Summary in Portuguese to be used by FCT to publicize the R&D Unit's Activity Plan. This summary may or may not correspond to what is requested below for evaluation purposes. The information provided in this field will be the responsibility of the R&D Unit coordinator.

Maximum 3000 characters.

#### 10.2 Summary in English for publicity purposes

Summary in English for publication corresponding to the previous summary in Portuguese. Maximum 3000 characters.

#### 10.3 Summary in English for assessment purposes

Summary in English for assessment purposes. Maximum 6000 characters.

### 11 Description of the Activity Plan for 2025-2029

#### 11.1 Objectives and strategy of the R&D Unit for 2025-2029

Describe the R&D Unit's objectives, strategy and goals for 2025-2029, including contributions to the advancement and application of knowledge, internationalization, international collaboration, advanced training, scientific training, coaching and mentoring, and prospect for career development provided by the R&D Unit to researchers, in particular, early career researchers, conditions for developing PhD programs in close collaboration with the R&D Unit, organization of conferences, colloquia or seminars, transfer of knowledge and technology, preservation, curation and dissemination of data and results (as provided for in the Open Science policy), promotion of scientific and technological culture and citizen science, actions of special relevance to society, of a scientific, technological, cultural, artistic, social or economic nature, partnerships, including special relationships with other R&D Units or participation in Associated Laboratories or other interinstitutional collaboration, and participation in infrastructures of international relevance. Plans for integrating researchers into permanent career positions, particularly R&D Unit interinstitutional partnerships established to implement the FCT-Tenure program, namely the Research Unit Chair positions (Cátedras UI), whenever suitable, should be highlighted. Include other relevant aspects, namely plans concerning Open Access, gender equality, inclusiveness, and data privacy. Maximum 10000 characters.

### 11.2 Organization of the R&D Unit for 2025-2029

Describe and justify the R&D Unit structure planned for 2025-2029, including reference to Thematic Lines and Research Groups and how they are organized, if applicable. Describe the main processes for managing the activities of the R&D Unit, coordinating Thematic Lines and how the involvement of Research Groups is ensured. If the R&D Unit integrates researchers from several Participating and/or Management Institutions, it must be described how interaction with these institutions is planned.

Maximum 7000 characters.

## 12 Research Groups (only for units with more than 50 integrated PhD holder researchers, and optional for these)

Each R&D Unit may or may not organize itself into Research Groups, each with a Principal Investigator. Regardless of the organization of the R&D Unit in this aspect, this section of the Application Form is only available for completion by R&D Units with more than 50 integrated PhD holder researchers, and it is optional.

#### 12.1 Identification of each Research Group

**12.1.1** Research Group reference Pre-filled field.

**12.1.2** Name of the Research Group in Portuguese Maximum 100 characters

### **12.1.3** Name of the Research Group in English Maximum 100 characters

#### **12.1.4** Keyword(s)

Enter a maximum of 4 keywords to adequately characterise the scope of the Research Group's activity.

Each keyword must be up to 50 characters long.

### **12.1.5** Existed in the period 2018-2023

YES or NO response field

**12.1.6** Description of up to 3 Research Group's most relevant contributions during 2018-2023 (publications are not considered in this subsection)

Describe the 3 contributions considered most relevant carried out by researchers from the Research Group included in the R&D Unit application (regardless of whether it previously existed or not) in 2018-2023. In the case of contributions that have been published, it is not intended to cite the publication, but to describe the contribution and justify why it is considered important. Maximum 3000 characters.

### 12.2 Researchers from each Research Group

### 12.2.1 List of Research Group's Integrated PhD holder Researchers

Select the Leading Researcher and the Integrated PhD holder Researchers that constitute the Research Group from the pre-filled list of Integrated PhD holder Researchers confirmed in the Team Registration menu (with links to the respective CIÊNCIAVITAE and ORCID).

**12.2.2** List of Research Group Collaborating Researchers Analogous to the previous field.

### 12.2.3 List of Research Group supervised PhD students

Select the PhD students members of the Research Group, who are supervised by Research Group's Integrated PhD holder Researchers, from the pre-filled list of PhD students identified in 9.3.

#### 12.3 Description and main contributions of each Research Group in 2025-2029

### 12.3.1 General description of the Research Group

Describe the Research Group indicating the scope of activities, the main objectives and aspects in which it intends to contribute to the various dimensions of R&D activities, regardless of whether the Research Group or the R&D Unit previously existed or not.

Maximum 2000 characters.

## 13 Thematic Lines (only for R&D Units with more than 100 integrated PhD holder researchers, and optional for these)

This section is optional. Thematic Lines, when existing must have a minimum critical mass.

#### 13.1 Identification of each Thematic Line

#### 13.1.1 Theme Line Reference

Pre-filled field.

### **13.1.2** Designation of the Thematic Line in Portuguese

Maximum 100 characters.

### **13.1.3** Designation of the Thematic Line in English

Maximum 100 characters.

#### **13.1.4** Coordinating researcher of the Thematic Line

Select the coordinating researcher of the Thematic Line from the pre-filled list of integrated PhD holder researchers confirmed in the Team Registration menu (with link to CIÊNCIAVITAE and ORCID identifier).

### 13.2 Description of each Thematic Line

### 13.2.1 Description of the Thematic Line

Briefly describe the objective of the Thematic Line. Explain why the Thematic Line is envisaged and how the organization of Researchers or Research Groups (if any) and Thematic Lines contributes to achieving the objectives and strategy of the R&D Unit.

Maximum 3000 characters.

### 13.3 Research Groups that contribute to each Thematic Line

### 13.3.1 List of Research Groups

Select the Research Groups that contribute to the Thematic Line from the available list.

#### 14 Ethical Issues

### 14.1 Ethical Issues (optional field)

Describe the ethical issues related to the planned activity, or the use of results from the R&D Unit's activity, and indicate how these issues will be addressed. Please consider the Ethics Self-assessment Guide available in the call documents section.

Maximum 6000 characters.

# 15 Aspects of the Activity Plan that involve requesting Programmatic Funding (all these fields are optional)

### 15.1 Funding for Multi-annual plan for hiring researchers in 2025-2029

Fill in the funding for researchers hiring plan, briefly describing the integration, hosting and stabilization strategy in their respective careers, as well as, how they are expected to contribute with added value to the activities of the R&D Unit. If applicable, highlight the co-responsibility and co-funding plan envisaged by the R&D Unit jointly with contracting entities (Higher Education Institutions) regarding the integration of researchers into permanent careers, including within the scope of the FCT-Tenure funding instrument (e.g., R&D Chairs), in coherence with the dimension, current human-resources profile, and trajectory of the R&D unit.

Maximum 5000 characters.

**Total Amount Requested in Euros** 

### 15.2 Funding for early career researchers

Fill in the funding and justify the fixed-term contracts up to three years for starting careers of PhD holders who have completed their PhD up to three years before the contract date.

Maximum 5000 characters.

Total Amount Requested in Euros

### 15.3 Strategy and funding for internationalization activities and promotion of European Formal R&D networks in 2025-2029

Describe the corresponding activities, by quantifying and justifying in detail the need for the corresponding funding, including the relevance for the objectives of the R&D Unit.

Maximum 5000 characters.

Total Amount Requested in Euros

### 15.4 Plan and funding for specific infrastructure and equipment in 2025-2029

Describe the corresponding activities, by quantifying and justifying in detail the need for the corresponding funding.

Maximum 5000 characters.

**Total Amount Requested in Euros** 

### 15.5 Plan and funding for R&D Unit internal call for project applications of the R&D Unit

Describe the plan of internal calls for project applications to be led by R&D Unit's integrated researchers, quantify and justify in detail the need for corresponding funding, including its relevance to the objectives of the R&D Unit.

Maximum 5000 characters.

**Total Amount Requested in Euros** 

### 15.6 Plan and funding for advanced training programs of the R&D Unit

Describe the PhD programmes contents and structure that exist or that will be implemented in the R&D Unit, their quality assurance, the selection and admission procedures for PhD candidates, quantify and justify the need for corresponding funding, including the relevance of PhD training in the unit's research objectives.

Maximum 5000 characters.

**Total Amount Requested in Euros** 

### 16 Funding planned for 2025-2029 for evaluation purposes

Completing the tables in the Application Form for the expected funding of the R&D Unit and for the expenditure budget of the R&D Unit in each Management Institution is mandatory. This information is considered part of the assessment of the adequacy of objectives, strategy, activity plan and organization of the R&D Unit for 2025-2029. Information concerning FCT funding does **not include amounts corresponding to Base or Programmatic Funding that may be granted by FCT, I.P. following the assessment** (for assessment purposes, the information to be considered for these components is the one provided in the previous section of the Application Form). All other sources (e.g. projects, grants or research contracts) should be considered. R&D Units obtaining an overall rating of "Excellent", "Very Good" or "Good" in the evaluation will have to complete, prior to signing the respective terms of acceptance, budgets relating to all sources of funding, including the Base or Programmatic Funding that is allocated following the evaluation.

The budget in each Management Institution for "Adaptation of buildings and facilities" to be ascribed to the Base or Programmatic Funding that may be attributed by FCT, I.P. following the evaluation, cannot exceed 10% of the total funding.

The budget of each Management Institution for "General charges" (including Overheads) to be allocated to the funding that may be attributed by FCT, I.P. following the evaluation is a fixed amount of 25% of the corresponding Base Funding.

The total budget of the R&D Unit for 2025-2029 is the sum of the budgets in the Principal Management Institution and other Management Institutions, if any.

### 16.1 Expected funding of the R&D Unit for 2025-2029

Fill in the table (in thousands of euros). **Do not include amounts corresponding to Base or Programmatic Funding to be allocated by FCT after the present evaluation exercise**. The annual amounts of all other planned funding, from any source, national or international, relating to activities in which integrated PhD holder researchers from the R&D Unit will be involved and related to expenses covered directly by funding obtained by the R&D Unit must be recorded. Do not include amounts corresponding to permanent salary expenses for teachers and researchers,

facilities, utilities, etc. that are ensured by the Participating or Management Institutions (or other entities) regardless of the funding obtained directly by the R&D Unit. The values recorded in the table will be taken into account for monitoring purposes, namely in the analysis of the progress and final reports planned for R&D Units that will be financed following the evaluation.

# 16.2 Expenditure budget of the R&D Unit at the Main Management Institution Fill in the table (in thousands of euros). Do not include expenses corresponding to Base or Programmatic Funding to be allocated by FCT after the present evaluation exercise.

This budget table must correspond to the annual application of all other expected funding relating to activities in which Integrated Researchers from the R&D Unit are involved and must correspond to expenses covered directly by the funding obtained by the R&D Unit. Do not include amounts corresponding to permanent salary expenses for teachers and researchers, facilities, utilities, etc. that are ensured by the Participating or Management Institutions (or other entities) regardless of the financing obtained directly by the R&D Unit.

### 16.3 Expenditure budget of the R&D Unit in other Management Institutions (if any)

For each of the Management Institutions, complete the corresponding table in the Application Form, analogously to that described for the Main Management Institution.

# 16.4 Estimate of the percentage distribution by types of expenditure to be ensured with Base Funding for 2025-2029 that will be obtained following the evaluation

Fill in the table with estimates of the percentage breakdown by expense categories to be ensured with Base Funding that will be attributed by FCT.

The budget in each Management Institution for "Adaptation of buildings and facilities" to be assigned to the Base Financing by FCT cannot exceed 10% of this total funding.

The budget of each Management Institution for "General charges" (including Overheads) to be allocated to the funding that will be attributed by FCT is a fixed amount of 25% of the direct expenses of the corresponding Base Financing.

### 17 Justification of the budget for 2025-2029

### 17.1 Justification of the proposed total budget

Maximum 4000 characters.

### **17.2 Justification of the Human Resources component in the proposed total budget** Maximum 4000 characters.

### **17.3 Justification of the Equipment component in the proposed total budget** Maximum 2000 characters.

### 18. Composition of the future External Advisory Board (mandatory field for all R&D Units)

Complete the table in the Application Form with the composition of the External Advisory Board of the R&D Unit in the immediate future.

For each member of the Board, indicate name, affiliation, and country of the affiliation.

#### 3. Validate and Lock the Application

The application form has an area where it is possible to view the description of any errors and alerts detected by automatic validations. Submission of the application form will not be possible if there are

errors. In addition to errors detected when filling out the application fields, or the absence of filling in mandatory fields, it will not be possible to submit the application if the requirement below, set out in number 4 of Article 6 of the Regulation is not met:

4 – Each R&D unit must incorporate integrated PhD holder researchers with a sum of weighting factors equal to or greater than ten, determined in accordance with the terms set out in number 2 of article 13 of the R&D Units Regulation.

The application can only be locked after the form has been fully validated. Validation, which can be done at any time, should not be left until the last minute. The Submit button should only be clicked when the application is finished and ready to be submitted to FCT, I.P. After that, it is not possible to change the application, although it is possible to view its content.

#### 4. Declarations of Commitment

The eligibility of applications is subject to confirmation of the Declarations of Commitment from the R&D Unit and the Main Management Institution (through the respective access delegation).

Confirmation of the declaration of commitment, by the coordinator of the R&D Unit, is made on the application form in the "Declaration of Commitment of the R&D Unit" section.

A screen will appear with the declaration of commitment and the coordinator of the R&D Unit must confirm their agreement with the terms and conditions by selecting the option "Accept these conditions and submit". After this confirmation, the application will go to the status confirmed by the coordinator of the R&D Unit, indicating the date and time of confirmation.

Confirmation of the declaration of commitment by the Main Management Institution is also made on the application form, in the "Declaration of Commitment by the Main Management Institution" section.

A screen will appear with the declaration of commitment from the Main Management Institution and the user, with delegated access to the PCT, must confirm their agreement with the terms and conditions by selecting the option "Accept these conditions and submit". After this confirmation, the application status will be confirmed by the Main Management Institution, and a date, time and user stamp will be produced.

After confirming the declarations of commitment, whenever changes are made to the application form, the process of confirming the declarations will necessarily have to be carried out again.

### Annex I. Instructions for filling out the Narrative CV

1. Scientific and professional profile and career - max. 2000 characters

In this section, you will be able to give a global perspective of your scientific and professional career. It may include the most significant periods, such as a summary of your training, research or teaching positions and respective institutions, coordination of projects or teams, also including main positions you held, such as, for example, positions of responsibility in the management of the university, research units, scientific societies, relevant editorial boards, or other positions, or appointments at national or international level.

You can also use this section to indicate possible suspensions of research activities with a significant impact on your professional career, such as parental leave, long-term absences due to illness, periods of work in the private sector, service commissions or other activities unrelated to research.

### 2. Contributions to science and society

### a) Contributions to the generation of new ideas, tools, methodologies or knowledge (max. 5000 characters)

In this section, you can describe how you contributed to the generation of new ideas, tools, methodologies, or knowledge, as well as the relevance and impact of your contributions. These may include scientific publications, key data sets, software, intellectual property (patents, licenses, trademarks, copyrights, new protocols, assays and/or reagents), conference presentations and proceedings, policy publications, or other scientific, technological, cultural or artistic production and/or activity. You can also use this section to mention any awards you have received in recognition of your contributions to knowledge generation.

To better inform Evaluation Panels about the relevance of your contributions, do not forget, when including what they were ('what'), to also consider 'how' or 'why' they were relevant, the roles you played, who benefited from them and in what way.

Regarding publications, you should not use metrics from scientific journals, such as impact factors or scientific performance metrics.

### b) Contributions to the training and career development of researchers and/or research teams (max. 2000 characters)

You can use this section to highlight how you contributed to the training and career development of researchers and/or teams, including participation in projects, leadership, management, collaborative activities, or team support activities. It may also include teaching activities, workshops or summer courses in which you have participated (whether for university students, graduates and postgraduates, as well as younger colleagues), guidance or supervision activities, mentoring or other contributions to the success of a team or promotion of colleagues.

It may also include the role you played (as PI, team member or other) in establishing collaborations and past or ongoing projects, as well as the management of scientific, technological and/or innovation programs or projects. You can also highlight here your participation in national or international networks, as well as your action in attracting funding (in particular, international) and consequent generation of conditions for the development and establishment of lines of research.

Describe the activities to support young scientists and describe, for example, what positions those you trained currently have.

### c) Contributions to the scientific community (max. 1500 characters)

This section may include various activities in which you have participated, and which have benefited the scientific community. These include editing, peer review, participating in evaluation processes as a panel member or expert, or organizing events that have benefited the scientific community. In this section you can also highlight any contributions that aimed to contribute to improving the research culture, inside or outside the research unit, such as activities related to

the promotion of gender equality, equal opportunities, diversity, mobility of researchers and recognition and appreciation of the various activities carried out by researchers.

### d) Contributions to society (max. 1500 characters)

You may include in this section how you promoted the involvement of society and the transfer of knowledge, to the public, private or non-profit sector or to the public in general.

### 3. Scientific production and/or selected activities - max. 2500 characters

In this section, you can include additional and detailed information about a maximum of five scientific productions and/or activities that best describe your career and research experience in the period under evaluation (2018-2023). For each of them, indicate the role you played and the impact you had on the advancement of knowledge in the respective scientific area. It can include any type of contribution from the previous three sections. Whenever your results have a DOI, include it.

### Annex II. FOS List of scientific domains and areas

Classification of scientific areas adopted by DGEEC – General Directorate of Education and Science Statistics in accordance with the OECD guidelines.

Domain	Main Scientific Areas of Activity
Exact and Natural sciences	Mathematics
Exact and Natural sciences	Computer and information sciences
Exact and Natural sciences	Physical sciences
Exact and Natural sciences	Chemical sciences
Exact and Natural sciences	Earth and related Environmental sciences
Exact and Natural sciences	Biological sciences
Exact and Natural sciences	Other natural sciences
Engineering and technology	Civil engineering
Engineering and technology	Electrical engineering, Electronic engineering, Information engineering
Engineering and technology	Mechanical engineering
Engineering and technology	Chemical engineering
Engineering and technology	Materials engineering
Engineering and technology	Medical engineering
Engineering and technology	Environmental engineering
Engineering and technology	Environmental biotechnology
Engineering and technology	Industrial biotechnology
Engineering and technology	Nano-technology
Engineering and technology	Other engineering and technologies
Medical and Health sciences	Basic medicine
Medical and Health sciences	Clinical medicine
Medical and Health sciences	Health sciences
Medical and Health sciences	Medical biotechnology
Medical and Health sciences	Other medical sciences
Agricultural sciences	Agriculture, Forestry, and Fisheries
Agricultural sciences	Animal and Dairy science
Agricultural sciences	Veterinary science
Agricultural sciences	Food and agricultural biotechnology
Agricultural sciences	Other agricultural sciences
Social sciences	Psychology
Social sciences	Economics and Business
Social sciences	Educational sciences
Social sciences	Sociology

Domain	Main Scientific Areas of Activity
Social sciences	Law
Social sciences	Political science
Social sciences	Social and economic geography
Social sciences	Media and communications
Social sciences	Other social sciences
Humanities	History and Archaeology
Humanities	Languages and Literature
Humanities	Philosophy, Ethics and Religion
Humanities	Arts (arts, history of arts, performing arts, music)
Humanities	Other humanities

### **Annex III. List of Evaluation Panels**

Each R&D Unit chooses from the list below the Evaluation Panel in which it will be evaluated. If less than 5 applications are submitted to an Evaluation Panel, that panel will not operate and the R&D Unit will be assessed by another Evaluation Panel from this list, identified in dialogue with the coordinator of the R&D Unit.

Evaluation Panels UID 2024		
Engineering Sciences and Technologies	Civil and Geological Engineering	
Engineering Sciences and Technologies	Computer Sciences and Information Technologies	
Engineering Sciences and Technologies	Materials Sciences and Engineering, and Nanotechnology	
Engineering Sciences and Technologies	Electrical and Computer Engineering	
Engineering Sciences and Technologies	Mechanical Engineering and Engineering systems	
Engineering Sciences and Technologies	Chemical and Biological Engineering	
Exact Sciences	Physics	
Exact Sciences	Mathematics	
Exact Sciences	Chemistry	
Health Sciences	Biomedicine	
Health Sciences	Clinical and Translational Research	
Health Sciences	Public Health, Nursing, Health Technologies	
Health Sciences	Sport Sciences	
Natural Sciences	Agricultural, Agro-food and Veterinary sciences	
Natural Sciences	Biological Sciences, Biodiversity and Ecosystems	
Natural Sciences	Earth and Environmental Sciences and Technologies	
Social Sciences	Language and Communication Sciences	
Social Sciences	Educational Sciences	
Social Sciences	Law	
Social Sciences	Political Sciences	
Social Sciences	Economics	
Social Sciences	Management	
Social Sciences	Psychology	
Social Sciences	Sociology, Anthropology and Geography	
Arts And Humanities	Architecture and Urbanism	
Arts And Humanities	Arts and Design	
Arts And Humanities	Literary Studies	
Arts And Humanities	History and Archaeology	

# Annex IV. R&D Unit Partnership Agreement with Management Institution



### ACORDO DE PARCERIA DE UNIDADE DE I&D COM INSTITUIÇÃO DE GESTÃO

(não se aplica à Instituição de Gestão Principal) no âmbito de candidatura a avaliação Programa Plurianual de Financiamento de Unidades de I&D (2023/24)

A Unidade de I&D
e a Instituição de Gestão
acordam em que% das parcelas de Financiamento Base concedido pela FCT para a Unidade de I&D no âmbito do Programa Plurianual de Financiamento de Unidades de I&D sejam diretamente enviadas para a Instituição de Gestão, sendo nesta destinadas a suportar os custos relativos às atividades dos investigadores da Unidade de I&D e, para efeitos de gestão financeira/administrativa, aplicadas sob a responsabilidade do Investigador Doutorado Integrado na Unidade de I&D que o Coordenador desta designe.  A Instituição de Gestão assegurará a satisfação dos requisitos legais aplicáveis à utilização deste financiamento e manterá permanentemente organizada a documentação justificativa associada, incluindo a relativa a contratação de recursos humanos, prestação de serviços ou aquisição de equipamentos, para prestação de contas, controlo ou auditoria pela FCT ou entidade que esta designar, sempre e quando a FCT decidir.
Data: (dia, mês, ano)
O responsável máximo da Instituição de Gestão (ou quem tenha delegação de competências para o efeito) (assinatura) Nome Legível
O Coordenador da Unidade de I&D (assinatura) Nome Legível

# Annex V. R&D Unit Partnership Agreement with Participating Institution



### ACORDO DE PARCERIA DE UNIDADE DE I&D COM INSTITUIÇÃO PARTICIPANTE

no âmbito de candidatura a avaliação Programa Plurianual de Financiamento de Unidades de I&D (2023/24)

A Unidade de I&D
e a Instituição Participante
acordam em que o(s) investigador(es) doutorado(s) afiliado(s) (como assalariado(s) ou bolseiro(s)) à Instituição Participante indicado(s) na lista seguinte integrem a Unidade de I&D:  1. (nome completo e categoria/situação profissional)  2. "  3
Acordam, também, as condições seguintes de utilização ou gestão de recursos adicionais humanos, materiais e/ou financeiros seguintes (escreva NA no caso de não aplicável) pela Unidade de I&D:
(a) Recursos humanos adicionais:
(b)Recursos materiais:
(c) Recursos financeiros:
Data: (dia, mês, ano)
O responsável máximo da Instituição Participante (ou quem tenha delegação de competências para o efeito) (assinatura) Nome Legível
O Coordenador da Unidade de I&D (assinatura) Nome Legível



