Fundação
para a Ciência
e a Tecnologia

Call for R&D Projects in All Scientific Domains 2025

Guide For Peer Reviewers

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Note to All Readers:

This Guide is designed primarily to support peer reviewers in their evaluation process, FCT makes it publicly available to ensure transparency and to help applicants understand how their proposals will be assessed. Applicants are encouraged to familiarize themselves with the evaluation criteria and guidelines described herein.

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1. About FCT

FCT (*Fundação para a Ciência e a Tecnologia*) is the Portuguese public agency under the responsibility of the Ministry for Education, Science and Innovation that supports science, technology, and innovation, in all scientific domains.

FCT's mission is to drive the advancement of knowledge in science and technology in Portugal, following high international standards in quality and competitiveness. It aims to foster the dissemination of knowledge, promoting its impact on society and its contribution to the economic growth.

FCT pursues its mission by funding fellowships, studentships and research contracts for scientists, research projects, research centres and infrastructures, through competitive and peer-reviewed calls. FCT secures Portugal's participation in international scientific organisations, fosters the participation of the scientific community in global projects and promotes knowledge transfer between Research and Development (R&D) centres and industry. In close collaboration with international organisations, FCT also coordinates public policy for the Information and Knowledge Society in Portugal and ensures the development of national scientific computing resources.

The outcomes of FCT accomplishments are reflected in the work carried out by individual scientists, research groups and institutions funded by FCT.

2. Call for R&D Projects in All Scientific Domains 2025

The consolidation and reinforcement of the National System of Science and Technology (NSST) constitute a priority of the national policy for science and technology. It aims to increase the national and international competitiveness of science and technology and its contribution to innovation and transfer of knowledge and at complying to the global aspirations defined in Agenda 2030: United Nations Sustainable Development Goals (SDGs). In this context, it is particularly relevant the promotion and strengthening of the scientific and technological institutions through the participation of research teams in Projects. Considering these goals, FCT launches the **Call for R&D Projects 2025**, across all scientific domains, in the following types:

- **Scientific Research and Technological Development Projects (SR&TD)** aimed at original and relevant scientific questions or concepts, using international standards as a reference, which make a significant contribution to the advancement of knowledge and which result in indicators of the achievement of scientific production during the course of the project.
- **Exploratory Research Projects (PEX)** focusing on original projects for early-career researchers, or on ideas or concepts with a high degree of novelty that demonstrate disruptive potential compared to previous work, for more experienced researchers.

National funds will finance the projects through the FCT budget. The funding to be granted is non-refundable, applying the **simplified cost option in the lump sum mode for both project types** (detailed information in Annex I).

This Call introduces the Lump Sum simplified costs methodology for SR&TD projects for the first time at FCT. Under this model, funding is based on estimated costs of tasks rather than actual expenditure. Payments are made upon presentation of evidence and results that demonstrate task completion and effective implementation of the approved project under the contractual terms. This represents a significant shift from traditional actual-cost reporting for SR&TD projects.

The **beneficiary entities** must be a legal entity belonging to the non-business entities of the R&D System, namely: higher education institutions, their institutes and R&D units; state, international or associated laboratories with a head office in Portugal; non-profit private institutions whose main object is R&D activity, including Collaborative Laboratories (CoLab) and Centres for Technology and Innovation (CTI); other non-profit public and private institutions developing or participating in scientific research activities.

All proposals, written in English, are submitted online via myFCT platform (detailed information in Annex II).

The **Principal Investigator (PI)** is responsible for selecting the project type (SR&TD or PEX) and from the provided list (OECD´s Revised Field of Science and Technology – FOS, adapted to the call), the set of **main scientific domain, area and subarea** which best classify their proposal, and must indicate up to four keywords that most accurately reflect the objectives and content of the proposed project. The scientific domain, area and subarea selection, **determines the corresponding evaluation panel**, listed in Annex III. The application will be considered **non-assessable** if the selected area and subarea do not correspond to the scientific content of the project.

The call is ruled by the FCT Projects Regulation, and the Announcement for Proposal Submissions, that outlines the applications' requirements, budget allocation and evaluation criteria. Additionally, FCT has prepared an Application Guide to assist the Principal Investigator (PI) by providing guidance for the preparation and submission of a successful application.

The call is open from **27 November 2025 until 11 March 2026 at 5 p.m. (Lisbon time).**

Each applicant can only submit **one application as PI**.

A **maximum of up to 4 Core CVs** can be presented**:** for the **PI** and **3 other team members** (researchers considered as more relevant for the project).

Evaluators should **only** use the **PI Narrative CV** and the **Team CV Synopsis** to assess the scientific merit of the team. The synopsis should focus on the **last 5 effective years of scientific activity.**

The CIÊNCIAVITAE CVs should **only be used to verify the information** provided in the previously mentioned sections.

2.1 Key differences Between Project types

The call supports two project types with distinct characteristics. The following table summarizes the key differences between SR&TD and PEX projects to support reviewers in their evaluation:

	SR&TD Projects	PEX Projects	Evaluation Impact
Maximum Duration	36 months (extendable for 12 months)	18 months (extendable for 6 months)	Feasibility
Maximum Funding	€250.000,00	€60.000,00	Budget adequacy
Call Budget	€80 million (320 projects)	€24 million (400 projects)	–
Initial Advance	30% of approved funding	75% of approved funding	–
Intermediate Payments	Yes: 65% of completed tasks, semi-annual basis	No intermediate payments	Understanding deliverables importance
Participating Institutions	Allowed (with budget)	Not allowed	Team structure considerations
Collaborative Institutions	Allowed (no budget)	Allowed (no budget)	Verify justification, scientific contribution, and work plan integration
Criterion B1 Focus	Scientific merit of PI	Scientific merit of PI + career development impact	**KEY DIFFERENCE in evaluation**
Criterion B Weights	B1: 60% | B2: 40% (of Criterion B 30%)	B1: 60% | B2: 40% (of Criterion B 30%)	Same weights, **different B1 focus**

Reviewers should be aware of these differences when assessing applications, particularly regarding timeline feasibility, budget adequacy, and career development considerations for **PEX projects under Criterion B1**.

3. Evaluation Criteria

The evaluation of the application will focus on the relevance and quality of following criteria:

For SR&TD Projects:

A. Scientific merit (A1) and innovative nature (A2) of the project from an international standpoint – **40%**;

B. Scientific merit of the PI (B1) and the research team (B2) – **30%**;

C. Feasibility of the workplan (including its planning) and the expected indicators, as well as the budget adequacy – **30%**.

For PEX Projects:

A. Scientific merit (A1) and innovative nature (A2) of the project from an international standpoint – **40%**;

B. Scientific merit of the PI, **including the impact** of the project's execution on the PI's career development and/or research (B1) and the research team (B2) – **30%**;

C. Feasibility of the workplan (including its planning) and the expected indicators, as well as the budget adequacy – **30%**.

Innovation (Criterion A) ≠ Feasibility (Criterion C):

Criterion A - **What** is proposed (merit, ambition, originality).

Criterion C - **How** feasible it is (planning, resources, implementation).

3.1 Criterion A (40%)

This criterion aims to assess the scientific merit and innovative nature of the project from an international standpoint (i.e., using international standards), considering two sub-criteria:

- A1 – Scientific merit of the project (50%)
- A2 – Innovative nature of the proposal (50%)

A1 – Scientific merit of the project (50%)

This sub-criterion is intended to evaluate the scientific merit of the proposal from an international standpoint, considering the following dimensions, in an integrated manner:

- Relevance and clear identification of the project objectives and challenges addressed based on the state-of-the-art.

- Potential contribution of the research project to the advancement of knowledge.
- Potential impact of the project's outcomes on the economic, technological, and societal dimensions.

A2 – INNOVATIVE NATURE OF THE PROPOSAL (50%)

The sub-criterion A2 aims to assess the innovative nature of the proposal, considering the following aspects:

- Originality of the project proposed and breakthrough potential beyond the current state-of-the-art (*e.g.*, novel concepts or development between or across disciplines).
- Methodological innovation and replication potential.

GENERAL ASSESSMENT GUIDELINES FOR CRITERION A

When evaluating Criterion A, reviewers should consider the following aspects, including but not limited to:

- **Evaluation standards:**
  Assess the proposal's scientific merit and innovative character in comparison with global best practices and ensure that the scientific quality is consistent with internationally accepted standards, noting that this does not imply that all projects must demonstrate international impact.

  For applications addressing issues specific to Portugal, reviewers may note how the Portuguese context or environment differs from, or presents unique characteristics compared to, global or international contexts. This is meant to provide context and should not be interpreted as a requirement for the project to demonstrate international impact.
- **Focus on ambition, originality, and innovation types:**
  Assess the originality of the proposed concepts and approaches, rather than viewing them as merely incremental extensions of existing work. Highly ambitious objectives are valued, but they should be grounded in solid scientific rationale and demonstrate genuine breakthrough potential to redefine the state-of-the-art knowledge. Recognize conceptual, methodological, applied, interdisciplinary innovations, and assess replicability of the proposed work.
- **Assess holistic impact:**
  Evaluate potential magnitude and scope across knowledge advancement and economic, technological, and societal dimensions. Acknowledge that fundamental research may yield long-term rather than immediate impact.

3.2 Criterion B (30%)

Criterion B evaluates the scientific merit of the Principal Investigator and the research team, analysing their curricula in an integrated way and valuing the quality of their research achievements. For **PEX projects**, this criterion also analyzes the relevance of project execution to the **early-career** development and/or research of the PI. For more **experienced PIs**, the focus shifts to whether the project demonstrates **disruptive** potential compared to their previous work.

This criterion is assessed through two sub-criteria with the same weightings for both project types, but with a distinct focus for sub-criterion B1 depending on the project type:

For SR&TD Projects:

- B1 – Scientific merit of the Principal Investigator (60%)
- B2 – Scientific merit of the research team (40%)

For PEX Projects:

- B1 – Scientific merit of the PI, including the impact of the project's execution on the PI's career development and/or research (60%)
- B2 – Scientific merit of the research team (40%)

B1 – Scientific merit of the Principal Investigator (60%)

Sub-criterion B1 evaluates the scientific merit of the PI, their contributions to science and society, and the profile of the research team. The evaluation is based on the information provided in the Narrative CV and Team CV synopsis fields, while the CIÊNCIAVITAE CV (written in English) is used solely to verify the details reported in those sections. The assessment is carried out with respect to the following parameters:

For SR&TD projects:

- Career profile of the PI (education, key qualifications, professional path and periods of leave from research, such as parental leave, long-term absence due to illness, volunteering, etc.).
- Contributions to the generation of new ideas, tools, methodologies, or knowledge, including publications, key data sets, software, intellectual property (patents, licences, trademarks, copyrights, novel assays and reagents), conference presentations, research and policy publications, or other scientific, technological, cultural or artistic achievements.
- Contributions to the development of individuals and/or research teams, including project participation, leadership or management, supervision of students, collaborative initiatives, and team support.
- Contributions to the research community and the broader society.

For PEX projects (in addition to the above):

Impact of project execution on the PI's career development and/or research for early-career PIs, and its disruptive potential compared to previous work for more experienced PIs, including:

- The PI's current career stage.
- The PI's current research lines and path, and the degree of novelty regarding other previous challenges addressed by the PI.
- Timeliness and career development potential in areas such as scientific production and dissemination, team and project leadership, engagement of students/young researchers, and the ability to enable future research and to attract funding or other resources.

B2 – SCIENTIFIC MERIT OF THE RESEARCH TEAM (40%)

This sub-criterion assesses the scientific merit of the research team, considering the research team CV synopsis (the CIÊNCIAVITAE CV of each team member will be used only to verify the details provided), through the following dimensions:

- Scientific experience, key achievements, and skills of the research team to adequately execute the proposed project in its specific area, **focusing on the last 5 effective years of activities**.
- Quality and relevance of team members' research outputs and expertise, including diverse forms of contributions such as publications, datasets, software, patents, and other relevant scientific, technological, or societal achievements.
- Appropriateness of the team composition and configuration for achieving the project objectives, including complementarity of skills and expertise, balance of roles and expertise levels, team size, and alignment of each member's profile and expertise with the specific tasks assigned to them in the work plan.
- Ability to engage and develop researchers in training (including master's students, doctoral candidates, and early-career researchers), considering the project's scope, duration, and objectives.
- Degree of internationalization of the team, when appropriate to the project's scope and objectives.
- Track record of collaboration among team members and with external partners, when applicable.
- Level of commitment and availability of team members to dedicate the necessary time and resources to the project execution.

When evaluating the Team CV Synopsis, reviewers should ensure that the PI has clearly demonstrated how each team member's profile and expertise align with the tasks assigned to them in the work plan. Reviewers should cross-reference the **Team CV Synopsis** with the **work plan tasks** to confirm this alignment.

GENERAL ASSESSMENT GUIDELINES FOR CRITERION B

According to the FCT's commitment to The Agreement on Reforming Research Assessment, as set out by the Coalition for Advancing Research Assessment (CoARA), evaluation panels are advised not to use metrics as a surrogate measure of the quality of individual outputs and applicant's contributions.

When assessing this criterion, the evaluation panel should consider the following aspects, among others:

- **Focus on quality over quantity:**
  Evaluate the relevance, impact, and quality of research outputs rather than counting publications or citations.
- **Value diverse contributions and career paths:**
  Acknowledge varied career trajectories, including career breaks, and transitions. Take into account contributions beyond traditional publications (e.g., datasets, software, open science practices, mentoring, public engagement).
- **Account for disciplinary differences:**
  Adapt the assessment to the specificities of the scientific area(s) and subarea(s), acknowledging that different disciplines have distinct research practices, output types, and impact timelines.
- **Assess contextually:**
  Consider the career stage, research environment, and available resources when evaluating the PI and team contributions.

3.3 Criterion C (30%)

This criterion is intended to evaluate the feasibility of the project considering the adequacy of its several dimensions, including the proposed objectives, work plan and planning, team composition, resources, and budget to achieve the expected outputs, considering the following:

- Feasibility and coherence of the work plan in relation to the proposed indicators, considering the theoretical framework, the proposed research methodology and innovation particularly the planning and sequencing of tasks, deliverables and milestones.
- Clear identification of the proposed activities and timelines, institutional and management resources of the Principal Contractor (and Participating Institutions, when applicable), and PI´s and team members commitment to the project.
- Valuation of the potential of the predicted indicators (*e.g.*, publications, communications, reports, seminars and conferences organization, patents, etc.).
- Risk assessment and mitigation: If applicable, analysis of the risks associated with different stages of the project, including ethical issues, with special focus on the identified critical points and the corresponding contingency plan.
- Budget adequacy to execute the tasks planned and consistency of the estimated costs (Lump Sum) to accomplish the objectives.

- Justification of collaborative institutions (when applicable): Assessment of the scientific contribution, integration in the work plan, and collaboration arrangements with collaborative institutions (entities without associated budget).

GENERAL ASSESSMENT GUIDELINES FOR CRITERION C

When evaluating feasibility under the Lump Sum model, reviewers should consider the following aspects, without being limited to:

- **Lump Sum model and task structure:**
  In the Lump Sum funding model, payments are based on task completion, as evidenced by the deliverables. Ensure that each task is associated with clearly defined, tangible deliverables, appropriately distributed across the project timeline. Long-duration tasks (e.g., management, communication, dissemination) may be split across the work plan to allow intermediate payments; this is acceptable as long as the division is coherent, avoids excessive fragmentation, and each split task has clear deliverables.
- **Budget adequacy and coherence:**
  Assess whether the proposed budget is adequate, proportionate, and capable of achieving the project objectives. Cost estimates must be reasonable, justified at the task level, and coherent with the scientific methodology. Check that the budget, work plan, and resource allocation are aligned with project objectives, and that ambitious projects (valued under Criterion A) remain feasible in terms of planning, timelines, and resources. Evaluation panels may recommend adjustments if costs are insufficient or excessive. Note that indirect costs are fixed at 25% of eligible direct costs.

Additional considerations:

- **Assess collaborative institutions appropriately (when applicable):**
  Evaluate the justification for collaborative institutions (entities without associated budget) based on their scientific contribution, integration in the work plan, added value, and collaboration arrangements. Verify that the proposed partnerships are suitable and feasible for achieving project objectives.
- **Ethics Assessment (when applicable):**
  Reviewers must ensure that the applicant has identified and adequately addressed all relevant ethics issues. Highlight any ethics issues that have not been identified or have been inadequately addressed by the applicant. For projects requiring ethics approvals (e.g., ethics committee approvals, animal welfare authorizations, data protection notifications), assess whether the work plan includes realistic timelines for obtaining these approvals, as approval processes often take longer than expected and research cannot commence without them. Note that supporting documents (informed consent forms, copies of approvals, authorizations) are only required after project approval if requested by FCT.

The **assessment guidelines** for Criteria A, B, and C are **illustrative** and **not exhaustive**. Evaluation panels should exercise their expert judgment and may consider additional relevant aspects appropriate to the specific proposals under review.

4. Scoring System

The scoring system uses a **9-point scale, using 0.1 increments**. The maximum score is 9 and the minimum is 1, as presented in Table I.

The Merit of the Project (MP) is calculated according to the following formula:

$$MP = 0.40\ (0.50\ A1 + 0.50\ A2) + 0.30\ (0.60\ B1 + 0.40\ B2) + 0.30\ C$$

Table I – Qualitative descriptors associated to the 9-point scale

Evaluation	Score	Strengths & Weaknesses
Excellent	9	Exceptionally strong with no weaknesses
Very good	8	Very strong with some negligible weaknesses
	7	Strong with some minor weaknesses
Good	6	Some strengths with numerous minor weaknesses
	5	Some strengths but with at least one moderate weakness
Adequate	4	Few strengths with several minor weaknesses
	3	Few strengths and major weaknesses
Poor	2	Very few strengths and serious weaknesses
	1	Cannot be assessed due to missing or incomplete information

An application can be considered **non-assessable** if:

a) the selected area and subarea do not correspond to the scientific content of the project, or
b) the application is not submitted totally or partially in English.

The criteria A, B and C are scored using a 9-point scale system (1 – minimum; 9 – maximum) with **decimal numbers**. The final score of MP is rounded to two-decimal places.

If the information provided in the application does not allow for evaluating a given criterion, then the respective criterion will receive a score of 1.0 (one).

For a proposal to be eligible for funding, a **minimum score of MP equal to or higher than 5.00 (MP ≥ 5.00)** is required.

The **eligible applications will be ranked** by the evaluation panel **by decreasing order** of the **MP score**.

For selection and decision-making regarding funding, projects will be ranked by the MP score obtained in the review process in decreasing order. As a tiebreaker between applications with the

same MP score, the classifications assigned to criteria A2, B1, A1, B2, and C will be used **successively and in descending order** to provide the final ranking of the projects.

The applicants that obtain a **MP score lower than 5.00** are not allowed to submit a new application as PI in the next edition of the Call for projects in all scientific domains.

5. Evaluation Process

5.1 Constitution of the Evaluation Panel

The evaluation panel consists of experts affiliated with foreign institutions, who are independent and have recognized merit. The panel's composition considers the number and the scientific areas of the applications, ensuring an adequate gender balance and a fair geographic and institutional distribution of evaluators.

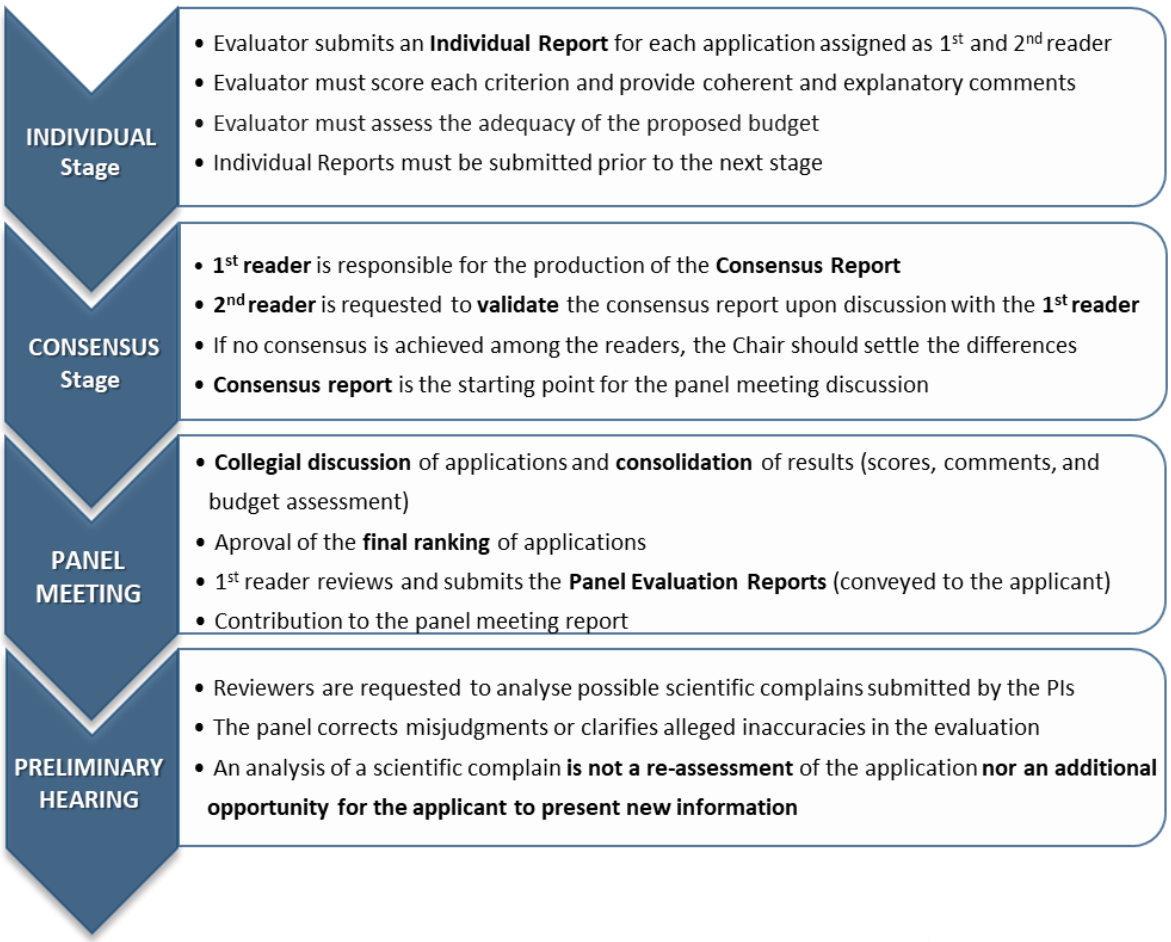
The panel has a **Chair** who is **responsible for the following tasks:**

- Ensure that the evaluation process is conducted transparently, independently and fairly.
- Assign each application to two panel members (1st and 2nd readers), considering **the match of scientific expertise** within the subject of the application, as well as any declared **Conflict of Interest (CoI)**.
- Ensure the evaluation process adheres to the defined timeframe and promptly inform panel members in case of any delays.
- Support the FCT team with the resolution of any CoI identified during the evaluation process.
- If needed, assist FCT with the constitution of the panel by suggesting possible reviewers to be invited.
- Recommend external reviewers to be invited by FCT to assess of an application, whenever a specific expertise is not adequately represented within the panel.
- Assure the reviewers' reports quality, particularly the Consensus and the Panel Reports, and alert them whenever needed; comments should be coherent with scores, considering the descriptors of the scoring system (see section 4), provide substantive arguments and identify both strengths and weaknesses for each evaluation (sub)criterion.
- Moderate the Panel Meeting.
- Prepare the panel meeting report that should address work methodology, conflicts of interest and final ranking.
- Coordinate the support provided to FCT and panel members during the period of preliminary hearings, if necessary.

Depending on the size of the panel and on the breadth of scientific subareas, a Co-Chair may be appointed to assist the panel Chair.

5.2 Evaluation Stages

The evaluation process comprises **4 stages**:



5.3 Evaluation Timeline

The evaluation timeline is established by FCT's Board of Directors and conveyed to the evaluation panel Chair and members. The date of the final videoconference panel meeting of the panel is established in advance by FCT.

5.4 Feedback to be communicated to applicants

All reviewers must comply with the following additional guidelines when preparing the evaluation reports.

Each report must include:

- **Score** and **comments** for each evaluation **criteria**, including strengths and weaknesses.
- A **detailed assessment of the proposed lump sum budget**, verifying that the estimated costs are adequate, reasonable, and strictly aligned with the activities and deliverables

described in the work plan tasks. Any suggested budgetary adjustments must be rigorously justified.
- A comment concerning ethical issues, if applicable.
- Confidential comments to the evaluation panel and /or FCT, if necessary.

Comments must:

- Be **coherent with the scores** considering the descriptors presented in Table I (section 4).
- Be clear, consistent and succinct, yet substantial, highlighting the strengths and weaknesses of the application for each (sub)criterion.
- Use dispassionate and analytical language, avoiding dismissive statements about the applicant, the proposed science, or the scientific field.
- Be impeccably polite.
- Address the proposed work plan and not the work the reviewers consider should have been planned.

Comments must not:

- Provide a description or a summary of the application.
- Use the first person or equivalent: "*I think*…" or "*This reviewer finds*…"; alternatively, panel members are advised to use expressions such as "***The panel considers***…" or "*It is considered*…".
- Ask questions, as the applicant will not be able to answer them.
- Provide recommendations or advice for improving the application.
- Have contradicting statements.
- Mention quantitative details that can easily originate factual mistakes.

The quality of the comments provided to applicants is of paramount importance to the evaluation process, therefore being a crucial task of the evaluation panel.

6. Confidentiality and Conflict of Interest

6.1 Confidentiality Statement

The privacy and confidentiality of applications must be fully protected and always ensured during the evaluation process. All reviewers involved in the evaluation are asked to be bound to the Terms of Reference.

Within the context of the call, a set of personal data is collected, and relevant information is provided to the data supplier to ensure compliance with the principles established in Regulation EU 2016/679 of the European Parliament and of the Council, of April 27, 2016 (GDPR) and the 58/2019 Law from August 8, in the Application Guide. For more detailed information, please consult the **Data Protection** document in the call's webpage.

6.2 Conflict of Interest (CoI)

Disqualifying Conflict of Interest

6.2.1 With the present Call

Researchers are hindered to participate as Chair, Co-Chair, Panel member or External reviewer if they:

i. Have **submitted** any application as PI.

ii. Have **first-degree relationships, domestic partnership or are married with a PI** of an application.

6.2.2 In a specific Panel

Researchers are hindered to participate as Chair, Co-Chair, Panel member or External reviewer in a panel in which they:

i. Participate in an application as team member or consultant.

ii. Have first-degree relationships, domestic partnership or are married with a team member or consultant of an application.

6.2.3 With an application

Panel members cannot evaluate nor participate in the panel meeting discussion of an application in the following circumstances:

i. Personal or financial interest in the application's success.

ii. Current or planned close scientific cooperation.

iii. Research cooperation within the last three years before the opening date of the call, *e.g.,* joint publications.

iv. Dependent employment relationship or supervisory relationship (*e.g.*, supervisor-student relationship up to and including the postdoctoral stage) within the three years before the opening date of the call.

v. Affiliation or pending transfer to any of the departments or research centres involved in the project.

vi. Researchers who are active in a council or similar supervisory or advisory board of the applying institutions are excluded from participating in the review and decision-making process for applications involving these institutions.

6.3 Potential Conflict of Interest

The panel member should notify FCT and clarify whether they are able to perform an unbiased evaluation or whether the conflict should be considered disqualifying. A potential conflict of interest exists in the following circumstances:

i. Relationships other than first-degree, marriage or domestic partnership; other personal ties or conflicts.

ii. Participation in university bodies other than those listed on no. 6.2.3-vi., *e.g.*, in scientific advisory committees in the research environment.

iii. Preparation of an application or implementation of a project with a closely related research topic (competition).

iv. Participating in an on-going scientific or inter-personal conflict with the applicant(s).

In case a conflict of interest is detected during the evaluation process, the reviewer must promptly inform the panel Chair and the FCT team of this situation to facilitate the swift reassignment of the application. Depending on the nature of the conflict, this information will be included in the panel meeting report.

Annex I - Understanding Lump Sum Funding

I.I What is Lump Sum Funding?

This Call introduces, for the first time at FCT, the Lump Sum simplified costs methodology for SR&TD projects. This new funding model represents a significant change in project management, aiming to reduce administrative burden for researchers and institutions.

Under this Lump Sum approach, funding is based on estimated costs of project tasks rather than on actual expenditure. This means that **payments** are **triggered** by the **completion of agreed project tasks and deliverables,** rather than by submitting receipts or detailed financial records.

PEX projects have adopted the Lump Sum methodology since 2023. This change now also applies to SR&TD projects.

The Lump Sum model operates on the following fundamental principles:

- **Budget based on estimated costs:** The proposal budget must include realistic estimates of the resources needed to carry out the work plan, in line with the Principal Investigator (PI) institution's usual accounting practices.
- **Payment linked to task completion:** FCT will release funds upon submission of evidence confirming the completion of tasks as defined in the approved project work plan.
- **Payment not success-dependent:** Payments are based on work completion as planned, not on achieving successful or positive research results. Research outcomes are inherently uncertain - a well-executed study with negative results still qualifies for payment if the deliverables and supporting evidence demonstrate the work was completed as planned. For example, if a hypothesis is refuted or a prototype fails to perform as expected, the task is still accepted if all planned activities were rigorously executed.
- **Simplified reporting:** The PI does not need to maintain detailed financial records or provide receipts to justify expenses to FCT (although internal institutional requirements may apply).

I.II Key Differences and Benefits

How Lump Sum differs from the traditional actual costs model:

- *Actual costs:* Payment based on documented actual costs → **Lump Sum:** Payment based on task completion
- *Actual costs:* Required detailed financial reporting → **Lump Sum:** Simplified reporting focused on results
- *Actual costs:* Need to keep and submit receipts/invoices to FCT → **Lump Sum:** No need to submit receipts to FCT

Main benefits of the Lump Sum model:

- **During application preparation:** Less bureaucracy, focus on scientific merit, simplified budget justification.
- **During project execution:** Reduced administrative burden, no detailed financial audits by FCT.

Costs incurred for the action do **not** have to be **documented**. However, beneficiaries remain subject to the accounting rules under the applicable national law.

I.III Payment Structure

Under the Lump Sum model, the payment structure is as follows:

SR&TD Projects:

- **Initial advance:** 30% of approved funding.
- **Intermediate payments:** 65% of the value of completed tasks, with requests for reimbursement on a semi-annual basis, except in duly justified and authorized situations, and considering the approved schedule of tasks. The sum of all payments before project closure cannot exceed 95% of total approved funding.
- **Final payment:** Remaining amount after project closure (scientific and financial components).

PEX Projects:

- **Initial advance:** 75% of approved funding.
- **Final payment:** Remaining amount after project closure (scientific and financial components).

For detailed payment methodology, please consult Section 4 of the Announcement for Proposal Submissions.

I.IV Guidelines for Preparing a Lump Sum Proposal

When preparing the proposal under the Lump Sum model, the PI should:

a. **Estimate costs realistically**: The budget should reflect realistic and actual expenses, follow the institution's standard accounting practices, and comply with FCT eligibility criteria (Articles 8 and 9 of the FCT Projects Regulation). While designing the budget, the PI should assess the amount of work and other resources needed for each project activity. For projects in co-promotion, this assessment can serve as the basis for the consortium to agree on the distribution of funds among partners. To estimate the budget, the PI can use costs from previous and similar projects.
b. **Justify the budget per task:** For each task, the PI must include a clear and transparent explanation of how the estimated amount was calculated.
c. **Define tasks and deliverables carefully:** Since payments are linked to task completion, the PI should ensure the work plan details well-defined tasks that are explicitly linked to clear, tangible deliverables throughout the entire project duration. A deliverable may be produced by a single task or result from multiple related tasks. Deliverables are the tangible outputs (reports, datasets, prototypes, publications, etc.) that demonstrate the work was carried out as planned. Long-duration tasks may be split across the work plan (e.g., management,

communication, and dissemination tasks), allowing intermediate payments for the corresponding activities. This option may be used by the PI whenever appropriate, provided that the division of long-lasting tasks remains coherent within the work plan and does not lead to excessive fragmentation, ensuring that the overall structure remains effective and reasonable.

d. **Link tasks to deliverables:** The Grant Agreement will specify the tasks, deliverables, milestones, and indicators. When preparing the work plan, the PI should clearly establish which deliverables each task will produce or contribute to. Task completion is verified through deliverables, outputs, result indicators, and supporting evidence documented in project reports. For SR&TD projects, intermediate payments are released only when tasks are 100% completed. For PEX projects there are no intermediate payments. The final payment for both types of projects is calculated based on the individual completion rate of each task. FCT does not require detailed financial records or receipts; payment depends on demonstrating that the contracted tasks and deliverables were achieved as planned.
e. **Include overhead costs:** Indirect costs are calculated as a fixed rate of 25% of all estimated eligible direct costs.
f. **Prepare a budget for evaluation:** Evaluation panels will assess whether the proposed budget is adequate for implementing the project as described, reasonable and not excessive, and coherent with the project's scientific objectives and methodology. Panels will also evaluate whether the proposed resources and the Lump Sum task structure allow for the completion of the activities described in the proposal. Panels may recommend adjustments if costs are considered insufficient or excessive.

For more detailed information about the Lump Sum methodology, please refer to:

- Methodology for Applying Simplified Costs – Lump Sums (available on the Call webpage)
- Announcement for Proposal Submissions (Section 4 - Payment Methodology)
- FCT Projects Regulation (Articles 8, 9, 20, and 21)

The following items are eligible for funding:

a) Direct costs:

i. **Human resources rationale:**

Expenses with **Human Resources** dedicated or related to the development of R&D activities related to the project execution in all mandatory components by the applicable labour legislation, including charges with grant holders directly supported by the beneficiaries;

- With regard to employment contracts, human resources expenses are based on the costs incurred in carrying out the project, based on the monthly base salary declared for the social protection of the worker, which may be increased by the mandatory social food allowance and occupational accident insurance under legally defined terms. The basic salary shall be the set of all

remunerations of a permanent nature subject to taxation and declared for the purpose of social protection of the worker;

- The research fellowships are tendered and contracted by the beneficiary entities in the context of the supported projects, which must comply with the Research Fellowship Holder Statute (Law no. 40/2004 of 18 August, in its present version) and FCT Regulation for Research Studentships and Fellowships.

ii. **Missions,** expenses with travel, accommodation, registration fees, etc., in Portugal and abroad, and directly attributable to the project.

iii. **Scientific and technical tools and equipment** (acquisition or amortization) indispensable to the project.

iv. **Patent registration,** expenses related to the national and foreign record of **patents, copyrights, usefulness models and drawings, national models or brands** when related to other forms of intellectual protection, namely rates, research to the status of the technique and consulting expenses.

v. **Demonstration, Promotion and Publication**, expenses with the **demonstration, promotion and disclosure of the project's outputs**, namely dissemination fees within the fulfilment and pursuant to national policies of open access.

vi. **Adaptation of buildings and facilities,** when essential to the development of the project, namely for environmental and security reasons, limited to 10% of total eligible project cost.

vii. **Acquisition of other goods and services** directly related to the project's execution, including costs with consultants.

b) Indirect costs (overheads), with a flat rate of 25% of eligible direct costs. The percentage bound in this item is automatically checked by the submission tool.

Non-Eligible Cost:

- Salaries of public servants are not funded under this call.

For the present Call, the **non-eligible costs** are the ones stated in the art. 9 of the FCT Projects Regulation in this current version.

Annex II – Components of the Application

Applications must be written in English and submitted online via a dedicated FCT Web Platform (myFCT).

Multiple applications of the same project are not allowed. New applications grounded on a previous project should contain substantial modification and update.

Each application comprises the following sections:

General Data

Project Description

- Project Title (PT/EN) **(max. 255 characters)**
- Project acronym **(max. 15 characters)**
- Keywords (PT/EN) **(max. 4 keywords)**
- Project typology **(SR&TD or PEX)**
- Main scientific area (Scientific domain / Scientific area / Scientific subarea)
- Timetable (start date and duration)

Institutions

Principal contractor

- Institution
- Research unit **(max. 3)**
- Institution description and its competencies for the development of the project **(max. 1500 characters)**

Participating institutions (*only available for SR&TD projects*)

- Institution
- Research unit **(max. 3)**
- Institution description and its competencies for the development of the project **(max. 1500 characters)**

Collaborative Institutions

- Country
- Institution
- Institution description and its competencies for the development of the project **(max. 1500 characters)**

Research team

Principal Investigator

- Institution to which you are associated in the scope of the research project
- PhD completion date
- CIÊNCIAVITAE CV permissions and upload

PI Narrative CV

- Career profile **(max. 4000 characters)**
- Contributions to Science and Society:
    - Contributions to the generation of new ideas, tools, methodologies or knowledge **(max. 5000 characters)**
    - Contributions to the development of individuals and/or research teams **(max. 3000 characters)**
    - Contributions to the research community and the broader society **(max. 3000 characters)**
    - Further details on selected scientific outputs and/or activities **(max. 5000 characters)**
    - Why would this grant be timely for me at this point in my career path and/or in my research? **(*only available for PEX projects*, max. 3000 characters)**

Members

- Email
- Institution to which you are associated in the scope of the research project

Hirings (if applicable)

- Type
- Institution to which you are associated in the scope of the research project

Consultant (if applicable)

- Email
- Framework of consultant's participation (**max. 1000 characters**)

Team CV Synopsis

- Research team CV synopsis **(max. 10000 characters)**

Work plan

Abstract

- Abstract in Portuguese **(max. 5000 characters)**
- Abstract in English **(max. 5000 characters)**
- Abstract for publication different? **(max. 5000 characters)**

State of the art and Objectives

- State of the art and objectives **(max. 6000 characters)**

Research plan and methods

- Research plan and methods **(max. 10000 characters)**

Bibliographic references

- Bibliographic references **(max. 10000 characters)**

Past publications

- Order
- Publication **(max. 600 characters)**
- URL

Tasks

- Task denomination (**max. 150 characters**)
- Task description and expected results **(max. 4000 characters)**
- Assigned to
- Person*month
- Start date
- Duration (months)
- Budgets:
  - Task costs
  - Cost justification of the task (max. 2500 characters)

Project timeline and management

- Deliverables List (add deliverable)
  - Deliverable
  - Deliverable description **(max. 800 characters)**
  - Tasks
- Milestones List (add milestone)
  - Denomination
  - Milestone description **(max. 300 characters)**
  - Tasks
  - Date
- Timeline (attached file)
- Management
  - Description of the management structure **(max. 3000 characters)**

Ethical issues (if applicable)

- Are there Ethics Issues identified in this project?
- Select the ethical declarations you consider appropriate (if applicable)
- Justification (if applicable) **(max. 3000 characters)**

2030 Agenda

- Framework of the application for the United Nations SDG 2030 Agenda (**up to 3 SDG**)

Other projects

- Add project
  - Project reference
  - Project status
  - Project title (in English)
  - Principal contractor
  - Funding
    - Funding entity
    - Total funding
  - Timetable
    - Start date
    - Duration (months)
  - Relation with the current proposal
    - State the main objectives considered relevant for the application being submitted to the present R&D Projects Call **(max. 2000 characters)**

Attachments

- Documents upload (if applicable)

Computing and data

- Advanced computing
    - The work plan requires advanced computer resources to be provided by FCT?
    - Do you have previous experience with High Performance Computing? (if applicable)
    - Refer previously used computational platforms (if applicable, **max. 400 characters**)
    - Which of the following amounts of resources (per year) is suitable for your project? (if applicable)
    - Brief justification for the requested computational resources (if applicable, **max. 400 characters**)
- Research data
    - You will be generating or collecting research data in the context of your project?
    - The work plan requires access to a research data repository provided by FCT? (if applicable)

Indicators

- Expected output indicators
- Dissemination
    - Indicate the dissemination actions of the scientific activity planned in the project **(max. 3000 characters)**

Budget

Principal contractor

- Budget (automatic filling)

Participating Institutions (*only available for SR&TD projects*)

- Budget (automatic filling)

Funding plan

- Global budget (automatic filling)
- Funding Plan (automatic filling)

Statement of Commitment

Validate and submit

Annex III – Evaluation Panels

Evaluation Panel	Scientific Area	Scientific Subarea
Mathematics	Mathematics	Pure Mathematics
		Applied Mathematics
		Statistics and Probability
		Other Subareas of Mathematics
Computer and Information Sciences and Informatics	Computer and Information Sciences	Computer Sciences
		Information Sciences
		Bioinformatics
		Informatics
Physics	Physical Sciences	Atomic, Molecular and Chemical Physics
		Condensed Matter Physics
		Particles Physics
		Nuclear Physics
		Fluids and Plasma Physics
		Optics
		Acoustics
		Astronomy
		Other Subareas of Physical Sciences
Chemistry	Chemical Sciences	Organic Chemistry
		Inorganic Chemistry
		Physical Chemistry
		Polymer Science
		Electrochemistry
		Colloid Chemistry
		Analytical Chemistry
		Nuclear Chemistry
		Other Subareas of Chemical Sciences
	Basic Medicine	Medicinal Chemistry
Civil Engineering	Civil Engineering	Civil Engineering
		Architecture Engineering
		Construction Engineering
		Transport Engineering
		Municipal and Structural Engineering

Evaluation Panel	Scientific Area	Scientific Subarea
Electrical and Electronic Engineering	Electrical Engineering, Electronic Engineering, Information Engineering	Electrical and Electronic Engineering
		Robotics
		Automation and Control Systems
		Communication Engineering and Systems
		Telecommunications
		Computer Hardware and Architecture
Mechanical Engineering and Engineering Systems	Mechanical Engineering	Mechanical Engineering
		Applied Mechanics
		Thermodynamics
		Aerospace Engineering
		Nuclear Engineering
		Audio Engineering and Reliability Analysis
		Engineering Systems
		Renewable Energies
	Environmental Engineering	Marine Engineering
		Sea Vessels
		Ocean Engineering
Chemical Engineering	Chemical Engineering	Chemical Engineering
		Chemical Process Engineering
Materials Engineering	Materials Engineering	Materials Engineering
		Ceramics
		Coating and Films
		Composites
		Paper and Wood
		Textiles

Evaluation Panel	Scientific Area	Scientific Subarea
Bioengineering and Biotechnology	Medical Engineering	Medical Engineering
		Medical Laboratory Technology
	Industrial Biotechnology	Industrial Biotechnology
		Bioprocessing Technologies, Biocatalysis and Fermentation
		Bioproducts, Biomaterials, Bioplastics, Biofuels, Bio-derived Bulk and Fine Chemicals and Bio-derived Novel Materials
	Medical Biotechnology	Health-related Biotechnology
		Technologies - Manipulation of Cells, Tissues, Organs or the Whole Organisms
		Technologies - Identification of the Functioning of DNA, Proteins and Enzymes and its relation with the Disease
		Biomaterials
		Medical Biotechnology related Ethics
Nanotechnology	Nanotechnology	Nanomaterials
		Nanoprocesses
		Nano-Optics and Nanophotonics
		Modelling at Nanoscale
Earth Sciences and Engineering	Environmental Engineering	Geological Engineering
		Geotechnics
		Petroleum Engineering, Energy and Fuels
		Remote Sensing
		Mining and Mineral Processing
	Earth and Related Environmental Sciences	Geosciences, Multidisciplinary
		Mineralogy
		Palaeontology
		Geochemistry
		Physical Geography
		Geology
		Volcanology
		Meteorology and Atmospheric Sciences
		Climatic Research
		Oceanography, Hydrology and Water Resources
		Geophysics

Evaluation Panel	Scientific Area	Scientific Subarea
Environmental Sciences	Earth and Related Environmental Sciences	Environmental Sciences
Environmental Biotechnology and Engineering	Environmental Engineering	Environmental Engineering
	Environmental Biotechnology	Environmental Biotechnology
		Bioremediation, Diagnostic Biotechnologies (DNA Chips and Biosensing Devices) in Environmental Management
		Environmental Biotechnology related Ethics
Biological Sciences	Biological Sciences	Plant Sciences and Botany
		Zoology, Ornithology, Entomology
		Marine Biology, Freshwater Biology and Limnology
		Ecology
		Biodiversity Conservation
		Biology
		Evolutionary Biology
		Behavioural Sciences Biology
		Mycology
		Other Biological Topics
Agriculture, Forestry and Fisheries	Agriculture, Forestry and Fisheries	Agriculture
		Forestry
		Fishery
		Soil Science
		Horticulture and Viticulture
		Agronomy, Plant Breeding and Plant Protection

Evaluation Panel	Scientific Area	Scientific Subarea
Animal and Veterinary Sciences and Agro-Food Biotechnology	Animal and Dairy Science	Animal and Dairy Science
		Husbandry
		Pets
	Veterinary Science	Veterinary Science
	Agricultural Biotechnology	Agricultural Biotechnology and Food Biotechnology
		GM Technology (Crops and Livestock) and Livestock Cloning
		Marker Assisted Selection
		Diagnostics
		Biomass Feedstock Production Technologies, Biopharming
		Agricultural Biotechnology related Ethics
	Other Engineering and Technologies	Food and Beverages
Experimental Biology and Biochemistry	Biological Sciences	Cell Biology
		Biochemistry
		Biochemical Research Methods
		Biophysics
		Genetics and Heredity
		Reproductive Biology
		Developmental Biology
		Microbiology
		Molecular Biology
Neurosciences	Basic Medicine	Neurosciences
Basic Medicine	Basic Medicine	Anatomy and Morphology
		Human Genetics
		Pharmacology and Pharmacy
		Toxicology
		Physiology
		Pathology
		Oncobiology
		Other Subareas of Basic Medicine

Evaluation Panel	Scientific Area	Scientific Subarea
Clinical Medicine, Immunology and Infection	Basic Medicine	Immunology
	Health Sciences	Tropical Medicine
		Parasitology
		Infectious Diseases
	Clinical Medicine	Andrology
		Obstetrics and Gynaecology
		Paediatrics
		Cardiac and Cardiovascular Systems
		Peripheral Vascular Disease
		Haematology
		Respiratory Systems
		Critical Care Medicine and Emergency Medicine
		Anaesthesiology
		Orthopaedics
		Surgery
		Radiology, Nuclear Medicine and Medical Imaging
		Transplantation
		Dentistry, Oral Surgery and Medicine
		Dermatology and Venereal Diseases
		Allergy
		Rheumatology
		Endocrinology and Metabolism
		Gastroenterology and Hepatology
		Urology and Nephrology
		Oncology
		Ophthalmology
		Otorhinolaryngology
		Psychiatry
		Clinical Neurology
		Geriatrics and Gerontology
		General and Internal Medicine
		Other Clinical Medicine Subjects
		Integrative and Complementary Medicine
	Biological Sciences	Virology
	Other Medical Sciences	Forensic Science

Evaluation Panel	Scientific Area	Scientific Subarea
Health and Sport Sciences	Health Sciences	Health Care Sciences and Services
		Health Policy and Services
		Nursing
		Nutrition, Dietetics
		Public and Environmental Health
		Epidemiology
		Occupational Health
		Sport and Fitness Sciences
		Social Biomedical Sciences
		Medical Ethics
		Substance Abuse
Psychology	Psychology	Psychology (including Human-Machine relations)
		Psychology, Special (including Therapy for Learning, Speech, Hearing, Visual and other Physical and Mental Disabilities)
Economics and Business	Economics and Business	Economics, Econometrics
		Industrial Relations
		Business and Management
Educational Sciences	Educational Sciences	Education, General (including Training, Pedagogy, Didactics)
		Education, Special (to Gifted Persons, those with Learning Disabilities)
Sociology	Sociology	Sociology
		Demography
		Anthropology
		Ethnology
		Social topics (Women's and Gender Studies; Social Issues; Family Studies, Social Work)
Law and Political Science	Law	Law, Criminology, Penology
		Other Subareas of Law
	Political Science	Political Science
		Public Administration
		Organisation Theory

Evaluation Panel	Scientific Area	Scientific Subarea
Social and Economic Geography	Social and Economic Geography	Environmental Sciences (Social Aspects)
		Cultural and Economic Geography
		Urban Studies (Planning and Development)
		Transport Planning and Social Aspects of Transport
		Other Subareas of Social and Economic Geography
Media and Communication	Media and Communications	Journalism
		Information Science (Social Aspects)
		Library Science
		Media and Socio-Cultural Communication
		Other Subareas of Media and Communications
History and Archaeology	History and Archaeology	History
		Archaeology
		History of Science and Technology
Languages and Literature	Languages and Literature	General Language Studies
		Specific Languages
		General Literature Studies
		Literary Theory
		Specific Literatures
		Linguistics
		Other Subareas of Languages and Literature
Philosophy	Philosophy, Ethics and Religion	Philosophy
		Ethics
		Theology
		Religious Studies
Arts	Arts	Arts
		Design and Architecture
		Performing Arts Studies (Musicology, Theatre Science, Dramaturgy)
		Folklore Studies
		Studies on Film, Radio and Television
		Art History
		Other Subareas of Arts

PORTUGUESE TO ENGLISH TRANSLATION AND EXPLANATIONS

Agregação = Aggregation. This is an academic title. It attests:

i.) the quality of the academic, professional, scientific and pedagogical curriculum;

ii.) the capacity to carry out research supervision;

iii.) the capability to coordinate and carry out independent research work, issued to PhD holders with a research and academic path, after a public exam by a jury involving discussion of the CV, of a submitted curricular proposal and the presentation and discussion of a lecture.

CEECInd = Individual Contract for Researchers to fund scientific employment contracts (salary and associated costs).

Doutoramento = PhD, doctoral degree

Mestrado = Master's degree

Licenciatura = BA (3, 4 or 5 years graduate course)

Bolsa = Grant, fellowship

Bolseiro = Grant holder, fellow

BII = Bolsas de Iniciação à Investigação = Research Initiation Grants

- Research Initiation Grants are intended for students enrolled in a Higher Professional Education, a 1st cycle of a Higher Education institution, an Integrated Master or Master to initiate their scientific training, within research projects to be developed in national institutions;
- These grants are also aimed at holders of a graduate degree, enrolled in courses that do not award an academic degree, integrated in an educational project of a higher education institution developed individually or jointly in their institutes or R&D units;
- These grants have a minimum duration of three months and may be renewable up to a maximum of one year.

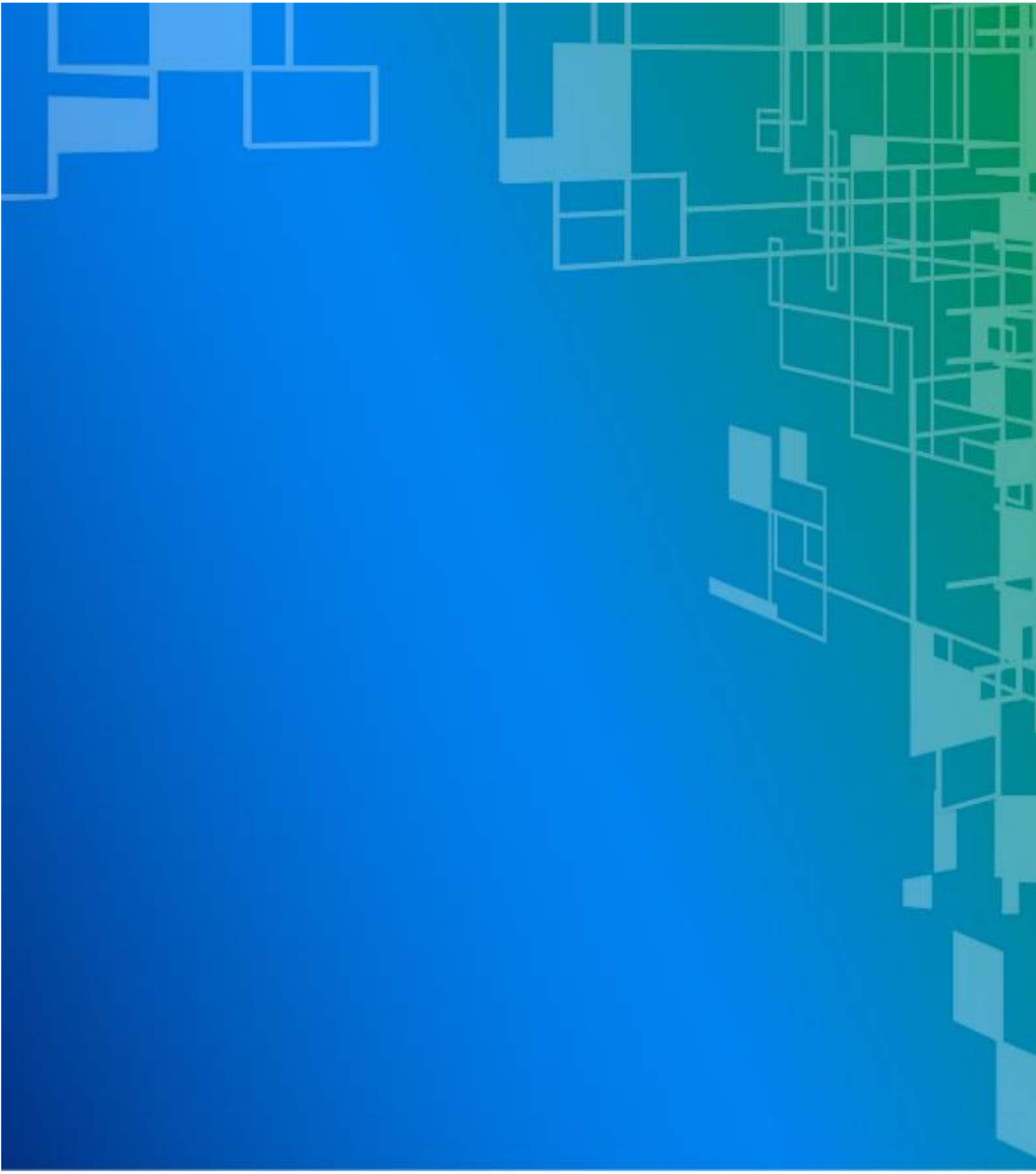
BI = Bolsas de Investigação = Research Grants

- Research grants are intended for students enrolled in an Integrated Master, Master or Doctoral degree, for obtaining the respective scientific academic degree, through the development of scientific training integrated or not in R&D projects;
- These grants are also aimed at holders of a graduate degree or master, enrolled in courses that do not award an academic degree, integrated in an educational project of a higher education institution developed individually or jointly in their institutes or R&D units;
- These grants are, in principle, one year in length, and cannot be awarded for periods of less than three consecutive months.

- The grants may be renewable for additional periods up to:
    - One year, for grants awarded to graduated degree or master holders enrolled in courses that do not award an academic degree;
    - Two years, for grants awarded to students enrolled in master's courses;
    - Four years, for grants awarded to students enrolled in doctoral degrees;
    - These grants may be national, mixed (in Portugal and abroad) or abroad, depending if the work plan occurs exclusively, partially or not at all in national institutions;
    - For mixed research grants, the work plan performed in a foreign institution may not exceed 2 years.

BIPD= Bolsas de Investigação Pós-Doutoral = Postdoctoral Research Grants

- Postdoctoral Research Grants are intended for doctoral degree holders for the development of R&D activities;
- BIPDs are temporally restricted in order to stimulate the scientific employment and the use of researcher contracts as a rule instrument for their hiring, as well as to promote the development, in National Scientific and Technological System entities, of careers aiming at scientific research;
- BIPDs may only be granted provided that the following requirements are cumulatively met:
    - The doctoral degree has been obtained in the last three years before the submission date of the application grant;
    - The postdoctoral research is carried out in a host entity different than the one in which the research work was done to achieve the doctoral degree;
    - The research activities do not require post-doctoral experience;
    - The research activities have a development and execution period equal or less than three years.
- These grants are, in principle, one year in length, renewable for up to a total of three years, and cannot be awarded for periods of less than three consecutive months;
- Once the contract grant is finished, a new contract grant cannot be settled between the same host entity and the same fellow.



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