

HR Excellence in Research

Action Plan

Action Plan

Case number

2025PT378442

Name Organisation under review

Reitoria da Universidade de Lisboa

Organisation's contact details

Alameda da Universidade de Lisboa, Cidade Universitária, Lisboa, 1649-004 Lisboa, Portugal

Submission date to the European Commission

09/10/2026

1. Organisational Information

Please provide a limited number of key figures for your organisation. Fields marked with * are compulsory.

STAFF & STUDENTS	FTE
Total researchers = staff, fellowship holders, bursary holders, doctoral candidates either full-time or part-time involved in research *	5441
Of whom are international (i.e. foreign nationality) *	983
Of whom are externally funded (i.e. for whom the organisation is host organisation) *	1268
Of whom are women *	2683
Of whom are R3 or R4 = established or leading researchers with a large degree of autonomy (e.g. holding the status of principal investigator or professor) *	1200
Of whom are R2 = recognised researcher (e.g. postdoctoral researcher, junior researcher) *	1126
Of whom are R1 = first stage researcher (e.g. doctoral candidate, research apprentice) *	2881
Total number of students (if relevant) *	31226
Total number of staff (including management, administrative, teaching, and research staff) *	6122
RESEARCH FUNDING (figures for the most recent fiscal year)	€
Total annual organisational budget	302620958
Annual organisational direct government funding (designated for research)	2198675

RESEARCH FUNDING (figures for the most recent fiscal year)

€

Annual competitive government-sourced funding (designated for research, obtained in competition with other organisations – including EU funding)	78170628
Annual funding from private, non-government sources, designated for research	9649950

ORGANISATIONAL PROFILE (a very brief description of your organisation, max. 100 words)

The University of Lisbon (ULisboa) is the largest and one of the most prestigious universities in Portugal, formed in 2013 through the merger of the former University of Lisbon and the Technical University of Lisbon. Bringing together 19 Schools spanning Natural and Exact Sciences, Engineer and Technology Sciences, Arts and Humanities, Social Sciences, Medicine and Health Sciences and Economics and Management, ULisboa is today the country's largest hub for higher education, with more than 52,000 students and 5,000 teaching staff and researchers.

ULisboa's mission is to promote the production and dissemination of knowledge through teaching, scientific research, and innovation, contributing to Portugal's social, cultural, economic, and scientific development, with international ambition and impact. As a research-intensive university, it hosts 70 internationally recognised R&D units and plays a central role in transferring knowledge and technology between academia, industry, and society, maintaining strong ties with some of the most prestigious research and innovation institutions in Portugal and abroad.

In 2025, ULisboa initiated the HR Excellence in Research process, aligned with the principles of the European Charter for Researchers (2023), with a view to obtaining the European Commission's HR Excellence in Research award. This process involves all 19 Schools of the University and builds on ULisboa's broader institutional commitment to responsible research assessment, reflected in its status as a signatory of the Agreement on Reforming Research Assessment (CoARA) since 2024.

2. Strengths and weaknesses of the current practice

Please provide an overview of the organisation in terms of the current strengths and weaknesses of the current practice under the four thematic headings of the European Charter for Researchers at your organisation.

Note: Click on the name of each of the four thematic headings of the European Charter for Researchers to open the editor and provide your answer.

Ethics, integrity, gender, and open science*

**Strengths and Weaknesses (max. 800 words)**

ULisboa begins the HR Excellence in Research process with a solid institutional foundation across ethics, integrity, open science, and equality, underpinned by University-wide governance structures, Charter and Statutes, and a growing network of cross-School coordination bodies. At the same time, the scale and federated nature of the University — 19 Schools with significant degrees of autonomy — creates uneven awareness, implementation, and monitoring across the institution, which the Action Plan will need to address.

Strengths

- All Schools have an Ethics Committee (or equivalent), coordinated through the ULisboa Network of Ethics Committees, and research integrity is embedded in the University's Charter and Statutes, Code of Conduct and Best Practice, Strategic Plan, and Whistleblowing Channel; over 90% of survey respondents report awareness of ethical practices and codes in their field.
- A dedicated Privacy Management Team, bringing together representatives from all Schools, the University's Data Protection Officer, and Ethics Committees, ensures a consistent, institution-wide approach to compliance with data protection legislation.
- Freedom of scientific research is strongly established, with over 90% of researchers reporting they enjoy freedom of thought and expression and are free to define and pursue their research, with no significant gaps identified in consultation.
- Open Science is actively supported through the ULisboa Research Portal, the iRe:SEARCH Interdisciplinary Research Data Management Centre, institutional Open Access support (including b-on Transformative Agreements), and complementary training through the Unite! Alliance.
- Gender equality has an established institutional framework, with the first Gender Equality, Inclusion and Non-Discrimination Plan (2022) and the Network for Gender Equality, Inclusion and Non-Discrimination (RIIND) coordinating measures across all Schools.
- Researcher mobility and the free circulation of knowledge are broadly supported institutionally, with no major gaps identified, reinforced by strategic partnerships such as Unite! University Alliance, the ULisboa School of Shanghai, and Erasmus+/Erasmus Mundus agreements.
- Sustainability awareness is high, with nearly 90% of survey respondents agreeing that research should align with sustainability principles, now being consolidated through the newly created ULisboa SUSTENTA Network (2025), a cross-cutting platform embedding sustainability across the research lifecycle.

Weaknesses

- Awareness and implementation of ethics and integrity principles remain uneven across Schools and Research Units, with Ethics Committees still often perceived as compliance bodies rather than strategic partners, and structured training — particularly for early-career researchers and PhD students — remains limited, including clearer guidance on the responsible use of AI.
- Engagement with Open Science principles and practices is uneven across the research community, with limited interoperability of research information systems and insufficient recognition of Open Science practices as part of research career development.
- Gender imbalance persists in senior academic and leadership positions, while Gender Equality Plans require stronger implementation, monitoring and common operational tools, alongside continued challenges around harassment underreporting and work–life balance, particularly for early-career researchers and staff with caring responsibilities.
- Diversity and inclusion policies show limited awareness and inconsistent implementation across the University, with remaining barriers to physical accessibility, limited international representation among academic staff, and insufficient institutional support for international researchers and PhD students (fragmented services, limited information in English, administrative burden around visas and onboarding).
- Some PhD students report limited integration into the University's research environment and collaborative networks, weakening their sense of belonging and recognition as researchers from the start of their careers.
- Sustainability awareness has not yet been consistently translated into institutional practice, with more structured support, guidance, and incentives needed to embed sustainability considerations into the planning and management of research activities.

Researchers assessment, recruitment, and progression*

**Strengths and Weaknesses (max. 800 words)**

ULisboa begins the HR Excellence in Research process within a robust national and institutional legal and regulatory framework ensuring that recruitment, selection, assessment, and career progression are, overall, open, transparent and merit-based, with researchers expressing general confidence in the fairness and competence of selection panels. This foundation is being actively reinforced through recent strategic commitments — most notably ULisboa's signatory status and Action Plan under the CoARA agreement — and through initiatives to modernise and better disseminate recruitment processes. At the same time, the University's federated structure means that practices are not yet fully harmonised across Schools, and there remains room to strengthen the consistency, transparency, and flexibility of assessment and career progression procedures.

Strengths

- ULisboa has been a signatory of the CoARA agreement since 2024 and approved its institutional CoARA Action Plan in 2025, providing a strategic framework for the gradual implementation of responsible research assessment practices, already disseminated through Schools' governing bodies and the wider research community.
- Recruitment, selection and career progression operate within a robust national and institutional legal framework, with researchers generally expressing confidence in the fairness, clarity, and merit-based nature of these procedures.
- Individual achievements, co-authorship, and mobility experience are generally recognised in career progression and performance appraisal processes, in line with the principles of the European Charter for Researchers (2023).
- Concrete digital and communication initiatives are planned or underway to support recruitment, including a University-wide digital platform covering the full recruitment lifecycle and institutional guidelines for the bilingual dissemination of recruitment opportunities via EURAXESS and institutional channels.
- Strategic partnerships and mobility programmes (Unite!, ULisboa School of Shanghai, Erasmus+/Erasmus Mundus) support the attraction of international talent and reinforce recruitment and career progression practices that value mobility and diverse career paths.

Weaknesses

- Assessment procedures still rely heavily on quantitative indicators, with limited recognition of the diversity of research contributions (teaching, innovation, societal impact, leadership, Open Science, experience outside academia), and evaluation criteria and decisions are not always sufficiently transparent or consistent across Schools and disciplines; the implementation of CoARA principles remains uneven, partly due to legal constraints and established institutional practices.

- Recruitment and selection practices are not yet fully harmonised across Schools, resulting in administrative complexity and inconsistencies in application procedures and candidate communication; selection processes continue to rely predominantly on documentary assessment, with limited flexibility to use complementary qualitative evaluation methods.
- International applicants and PhD students report the need for clearer information on recruitment and assessment procedures, criteria, timelines, and outcomes, alongside relatively low international representation among academic staff, despite a growing number of international PhD students and researchers.
- Career progression opportunities remain limited, particularly for intermediate and senior positions, due to a low number of vacancies and constraints imposed by the national legal framework; progression remains strongly dependent on recruitment calls, reducing flexibility in recognising merit and professional development, and contractual instability continues to affect early-career researchers in particular.
- Institutional support for career development, mentoring, and professional integration remains limited, especially for early-career and international researchers and those transitioning from other sectors, with difficulties in balancing research, teaching, supervision, leadership and administrative responsibilities throughout the academic career.

Working conditions and practices*

**Strengths and Weaknesses (max. 800 words)**

ULisboa enters the HR Excellence in Research process with a positive but uneven picture of researchers' working conditions, shaped significantly by the national legal and funding framework governing Portuguese public universities. Recent efforts to expand permanent recruitment and strengthen Open Science infrastructure show clear institutional commitment, but employment stability, remuneration, and administrative and technical support remain the areas of greatest concern for researchers, particularly at early career stages. Strengthening institutional coordination and communication around existing support mechanisms will be key to translating researchers' broad awareness of their rights and obligations into a more supportive day-to-day working environment.

Strengths

- ULisboa has significantly strengthened the recruitment of permanent academic and research staff over the last decade, particularly through a large number of international recruitment calls, aimed at replacing retiring staff, rejuvenating the academic workforce, and responding to early-career researchers' expectations.
- Researchers report a good level of awareness of the national, sectoral and institutional regulations governing their professional activities, with almost 80% of survey respondents familiar with the legal and institutional framework applicable to their work.
- Researchers show a strong commitment to the dissemination and societal exploitation of research results, with more than 90% of survey respondents agreeing that research outcomes should be disseminated in line with contractual obligations and communicated in ways understandable to society.
- Since 2023, ULisboa has strengthened its Open Science ecosystem through the ULisboa Research Portal, the iRe:SEARCH Interdisciplinary Research Data Management Centre, institutional support for Open Access and FAIR data, and a comprehensive Open Science training programme delivered with the Unite! Alliance.
- Initiatives such as the ULisboa 3-Minute Thesis (3MT®) competition strengthen doctoral researchers' communication skills and support innovation, entrepreneurship, and knowledge transfer.
- Around two-thirds of researchers consider that facilities, resources and general working conditions allow for a good research environment, reflecting an overall positive baseline despite acknowledged constraints.

Weaknesses

- Employment stability was one of the concerns most frequently raised in consultation, particularly by early-career researchers: only around half of survey respondents agreed that their School actively promotes research job stability, reflecting broader structural constraints across the Portuguese higher education and research system, rather than issues specific to ULisboa alone.

- Remuneration, social coverage, and participation in organisational governance were rated less positively than general working conditions (54% and 61% satisfaction respectively), with financial constraints at national and institutional level limiting stable career opportunities, competitive salaries, and research funding.
- Contractual instability and diverse employment arrangements continue to affect many researchers, particularly at early career stages, with limited opportunities for progression to stable academic or research positions and differences in organisational structures and working conditions across Schools and Research Units.
- Early-career researchers and PhD students report limited familiarity with the practical aspects of conducting research, including institutional procedures, intellectual property, research funding requirements, research security and cybersecurity, indicating a need for more structured guidance.
- Science communication and public engagement are not yet systematically recognised or valued as part of researchers' academic activities, and researchers report limited knowledge of intellectual property, knowledge valorisation and technology transfer processes, particularly at early career stages.
- Institutional support and strategic communication for the dissemination and societal uptake of research results could be further strengthened, alongside improved administrative, technical and IT services and access to research infrastructure.

Research careers and talent development*

**Strengths and Weaknesses (max. 800 words)**

ULisboa enters the HR Excellence in Research process with a broad, though not yet fully structured, set of training and development opportunities spanning transversal skills, pedagogical competences, and researcher wellbeing, complemented by strong access to the Unite! University Alliance's training catalogue and joint initiatives. Supervision and mentoring relationships are generally regarded positively across the University, and professional development is widely recognised as important. At the same time, career development stands out as one of the areas most critically assessed during consultation, with structured career guidance, stage-specific pathways, and formalised mentoring frameworks still to be consolidated at institutional level.

Strengths

- ULisboa offers a wide range of professional development opportunities — training courses, workshops, seminars, conferences and online resources — organised both by the University and through the Unite! Alliance, including the Unite! Researchers Development Framework and Development Needs Analysis Tool.
- An integrated Programme for the Pedagogical Development of Academic Staff supports the continuous development of teaching, supervision and leadership competences, complemented by peer classroom observation ("Observe and Learn") and School-specific mentoring initiatives tailored to disciplinary contexts.
- Supervision and mentoring are regarded positively across the University, with most survey respondents acknowledging regular relationships with supervisors during the research training phase and recognising the contribution of senior researchers to the development of early-career colleagues.
- 71% of survey respondents agree that researchers have opportunities to update and expand their skills and competencies, reflecting a generally positive baseline for continuous professional development.
- The Unite! Widening Research & Innovation Academy and Summer School provide additional training actions — including opportunities abroad — reinforcing transferable skills and international exposure for ULisboa researchers.
- Dedicated initiatives such as the European Research Funding Accelerator Programme and the ULisboa Health & Well-being Week complement the institutional training offer with targeted, practical support.

Weaknesses

- Career development attracted the most critical feedback during consultation: only 37% of respondents agreed their School has a clear strategy to support career development, and only 31% considered career guidance and job placement support to be available, with PhD students and early-career researchers expressing the most critical views.

- Access to professional development opportunities varies considerably across career stages, with only about half of respondents perceiving equal opportunities, and unequal access particularly affecting PhD students and early-career researchers, including limited opportunities to develop teaching, supervision and broader professional skills.
- Structured and consistent mentoring remains limited, particularly during the first year of the PhD when integration into the research environment is most critical, with variability in supervisory practices and mentoring quality across Schools and Research Units, and insufficient institutional support beyond the individual supervisor-student relationship.
- There is limited integration of researchers into diverse professional environments, with scope to strengthen links with industry, public organisations and society, to broaden employability and support career diversification beyond academia.
- Recognition of diverse research profiles and career paths — including interdisciplinary and intersectoral experience, innovation, and contributions beyond traditional academic outputs — is not yet systematically embedded in institutional practice.
- International researchers identify language as a barrier to full participation in institutional training and development activities, and formal and informal qualifications and competencies are considered adequately recognised by only around half of respondents.

3. Actions

The Action Plan and HR Excellence in Research strategy must be published in an easily accessible location of the organisation's website.

Please provide the web link(s) to the organisation's action plan / strategy for the implementation of the principles of the European Charter for Researchers. Multiple links must be comma-separated.

<https://www.alleageneralassembly.org/wp-content/uploads/2023/06/European-Code-of-Conduct-Revised-Edition-2023.pdf>; <https://eur-lex.europa.eu/eli/dir/2019/1937/oj?eliuri=eli%3Adir%3A2019%3A1937%3Aoj&locale=en>; <https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:02016R0679-20160504>; <https://diariodarepublica.pt/dr/detalhe/lei/55-2025-916177977>; <https://diariodarepublica.pt/dr/en/detail/decreelaw/207-2009-488490>; <https://files.diariodarepublica.pt/1s/2007/09/17400/0635806389.pdf>; <https://diariodarepublica.pt/dr/detalhe/lei/93-2021-176147929>; <https://www.cnsc.gov.pt/docs/rel-sociedade2023-observ-cnsc-dig.pdf>; <https://diariodarepublica.pt/dr/detalhe/decreto-lei/63-1985-326921>; <https://diariodarepublica.pt/dr/detalhe/decreto-lei/110-2018-117279933>; <https://eur-lex.europa.eu/PT/legal-content/summary/general-data-protection-regulation-gdpr.html>; <https://diariodarepublica.pt/dr/detalhe/lei/58-2019-123815982>; https://www.ulisboa.pt/sites/default/files/documents/document/default/despacho_normativo_n.o_14_2019.pdf; https://www.ulisboa.pt/sites/default/files/documents/document/default/regulamento_de_propriedade_intelectual_da_universidade_de_lisboa.pdf; <https://www.ulisboa.pt/sites/default/files/documents/page/2024/codigo-de-conduta-e-boas-praticas-ulisboa-2015-apos-senado-e-cg-vf.pdf>; <https://canaldedenuncia.ulisboa.pt/index-en.html>; <https://www.ulisboa.pt/documento/plano-estrategico-2023-2027>; <https://www.ulisboa.pt/documento/regulamento-disciplinar-dos-estudantes-da-universidade-de-lisboa>; <https://www.ulisboa.pt/documento/carta-de>

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[https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:02016R0679-20160504;](https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:02016R0679-20160504)
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[https://files.diariodarepublica.pt/1s/2007/09/17400/0635806389.pdf;](https://files.diariodarepublica.pt/1s/2007/09/17400/0635806389.pdf) [https://diariodarepublica.pt/dr/detalhe/lei/93-2021-176147929;](https://diariodarepublica.pt/dr/detalhe/lei/93-2021-176147929)
[https://www.cncs.gov.pt/docs/rel-sociedade2023-observ-cncs-dig.pdf;](https://www.cncs.gov.pt/docs/rel-sociedade2023-observ-cncs-dig.pdf) [https://diariodarepublica.pt/dr/detalhe/decreto-lei/63-1985-326921;](https://diariodarepublica.pt/dr/detalhe/decreto-lei/63-1985-326921)

<https://diariodarepublica.pt/dr/detalhe/decreto-lei/110-2018-117279933>; <https://eur-lex.europa.eu/PT/legal-content/summary/general-data-protection-regulation-gdpr.html>; <https://diariodarepublica.pt/dr/detalhe/lei/58-2019-123815982>;
https://www.ulisboa.pt/sites/default/files/documents/document/default/despacho_normativo_n.o_14_2019.pdf;
https://www.ulisboa.pt/sites/default/files/documents/document/default/regulamento_de_propriedade_intelectual_da_universidade_de_lisboa.pdf;
<https://www.ulisboa.pt/sites/default/files/documents/page/2024/codigo-de-conduta-e-boas-praticas-ulisboa-2015-apos-senado-e-cg-vf.pdf>;
<https://canaldedenuncia.ulisboa.pt/index-en.html>; <https://www.ulisboa.pt/documento/plano-estrategico-2023-2027>;
<https://www.ulisboa.pt/documento/regulamento-disciplinar-dos-estudantes-da-universidade-de-lisboa>; <https://www.ulisboa.pt/documento/carta-de-direitos-e-garantias-da-universidade-de-lisboa>; <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:12012P/TXT>;
<https://www.alleageneralassembly.org/wp-content/uploads/2023/06/European-Code-of-Conduct-Revised-Edition-2023.pdf>;
<https://www.parlamento.pt/sites/EN/Parliament/Documents/Constitution7th.pdf>; <https://diariodarepublica.pt/dr/detalhe/lei/55-2025-916177977>;
<https://diariodarepublica.pt/dr/en/detail/decree-law/207-2009-488490>; <https://files.diariodarepublica.pt/1s/2007/09/17400/0635806389.pdf>;
<https://www.ulisboa.pt/en/info/equality-and-inclusion>;
https://www.ulisboa.pt/sites/default/files/documents/document/default/despacho_normativo_n.o_14_2019.pdf;
<https://www.ulisboa.pt/sites/default/files/documents/page/2024/codigo-de-conduta-e-boas-praticas-ulisboa-2015-apos-senado-e-cg-vf.pdf>;
<https://www.ulisboa.pt/documento/plano-estrategico-2023-2027>; <https://www.ulisboa.pt/en/info/open-science>; <https://researchportal.ulisboa.pt/en/>;
<https://www.ulisboa.pt/en/info/support-open-science>; <https://www.ulisboa.pt/sites/default/files/inline-files/unite-white-paper-a-new-university-open-science-and-innovation-governance-model-and-policy-for-a-sustainable-world.pdf>; <https://www.unite-university.eu/unitenews/unite-launches-iris-its-research-innovation-services-network>; <https://www.ulisboa.pt/info/jornadas-cientificas>;
<https://www.ulisboa.pt/sites/default/files/documents/page/2025/plangenderequalityinclusionnon-discriminationulisboa.pdf>;
<https://www.ulisboa.pt/sites/default/files/documents/page/2025/plangenderequalityinclusionnon-discriminationulisboa.pdf>;
<https://www.ulisboa.pt/en/info/equality-and-inclusion>; <https://www.ulisboa.pt/sites/default/files/documents/page/2025/plangenderequalityinclusionnon-discriminationulisboa.pdf>; <https://www.ulisboa.pt/info/redesustenta>; <https://www.ulisboa.pt/en/info/support-open-science>;
<https://researchportal.ulisboa.pt/en/>; <https://www.ulisboa.pt/info/coara>; <https://www.ulisboa.pt/info/coara>; <https://diariodarepublica.pt/dr/detalhe/lei/55-2025-916177977>; <https://diariodarepublica.pt/dr/en/detail/decree-law/207-2009-488490>; <https://www.ulisboa.pt/en/info/three-minute-thesis-university-lisbon>; https://www.pgdulisboa.pt/leis/lei_mostra_articulado.php?artigo_id=3067A0009&nid=3067&tabela=leis&pagina=1&ficha=1&so_miolo=&nversao=; <https://diariodarepublica.pt/dr/detalhe/decreto-lei/115-2013-498487>; <https://diariodarepublica.pt/dr/detalhe/portaria/285-2015-70297426>; <https://www.fct.pt/en/sobre/estudos-e-planeamento-estrategico/politicas-de-ciencia-aberta/acesso-aberto-a-publicacoes-cientificas/>; <https://www.ulisboa.pt/sites/default/files/inline-files/unite-white-paper-a-new-university-open-science-and-innovation-governance-model-and-policy-for-a-sustainable-world.pdf>; <https://www.unite-university.eu/unitenews/unite-launches-iris-its-research-innovation-services-network>; <https://www.unite-university.eu/unitenews/use-unite-agora-for-the-joint-network-of-integrated-research-and-innovation-services-iris>; <https://www.ulisboa.pt/info/jornadas-cientificas>; <https://www.ulisboa.pt/en/info/ulisboa-colleges>;
<https://facultyandstaff.unite-university.eu/courses-catalog>; <https://facultyandstaff.unite-university.eu/rdf-1>; <https://facultyandstaff.unite-university.eu/dna-tool>; <https://www.ulisboa.pt/en/info/pedagogical-development-professors>; <https://www.ulisboa.pt/info/observar-e-aprender>;
<https://www.ulisboa.pt/noticia/programa-de-aceleracao-de-candidaturas-financiamento-europeu-em-investigacao-edicao-2026>;

<https://saudebemestar.ulisboa.pt/evento/semana-da-saude-bem-estar-na-ulisboa>; <https://www.ulisboa.pt/en/event/unitewidening-summer-school-ulisboa-innovation-training-days>; <https://www.ulisboa.pt/en/info/pedagogical-development-professors>.)

Please fill in the list of all individual actions to be undertaken in your organisation's HR Excellence in Research strategy to address the weaknesses or strengths identified in the gap analysis. It is recommended that the listed actions are concise but detailed enough for the assessors to determine the level of ambition, engagement, and planning for the implementation process. Please ensure that you provide a detailed plan, with precise and quantifiable KPIs, not just an enumeration of the institution's action.

Note: Choose one or more of the principles automatically retrieved from the gap analysis with their ratings.

Proposed actions

Action 1

A1 - Responsible Research and Innovation Framework
Strengthen the institutional framework for responsible research and innovation by promoting a coherent, integrated approach to research ethics, integrity, Open Science and the responsible use of AI, including an update of the Code of Conduct and Best Practice and reinforced coordination through the ULisboa Network of Ethics Committees.

GAP Principle(s)

- (+/-) 1. ETHICS AND RESEARCH INTEGRITY
(++) 2. FREEDOM OF SCIENTIFIC RESEARCH

Timing (at least by year's quarter/semester)

Q4 2027

Responsible

Unit

Indicator(s) / Target(s)

ULisboa
Network of
Ethics
Committees /
Privacy
Management
Team /AI
Working
Group

Indicator: updated Code of Conduct approved; number of training/awareness actions delivered. Target: Code of Conduct update approved by Q1 2027; ≥4 training actions/year.

Proposed actions

Action 2

A2 - Open Science Promotion and Support Programme
Develop and implement a comprehensive Open Science Promotion and Support Programme, consolidating existing services (ULisboa Research Portal - Integrated Research Information System, iRe:SEARCH - Interdisciplinary Research Data Management Centre) and providing awareness-raising, training and guidance on FAIR data, Open Access and responsible AI use, particularly for early-career researchers and PhD students.

GAP Principle(s)

(++) 2. FREEDOM OF SCIENTIFIC RESEARCH

(+/-) 3. OPEN SCIENCE

(+/-) 16. DISSEMINATION AND EXPLOITATION OF RESULTS

Timing (at least by year's quarter/semester)

Q4 2028

Proposed actions

Responsible Unit	Indicator(s) / Target(s)
iRe:SEARCH — Interdisciplinary Research Data Management Centre / Information Technology office / Archives, Documentation and Publications / Research & Innovation Management office	Indicator: number of training sessions and participants; Open Access publication rate and deposits; Open Data guidance and practices implemented. Target: ≥6 training actions/year; 20% increase in Open Access deposits by 2028 (2025 baseline: 831; target: ≥998); Open Data guidance and support implemented by 2028.

Proposed actions

Action 3

A3 - ULisboa Equality, Diversity and Inclusion Framework Update and implement the ULisboa Equality, Inclusion and Non-Discrimination Plan, broadening its focus to diversity in all its dimensions, including measures for transparent recruitment and career progression, work-life balance (e.g. teaching-free semester after extended parental leave), and awareness-raising on unconscious bias and harassment prevention. The framework will also incorporate digital accessibility, ensuring equitable access to recruitment, information, training, mobility and career development opportunities for researchers with disabilities.

GAP Principle(s)

- (+/-) 4. GENDER EQUALITY
- (+/-) 5. EMBRACING DIVERSITY
- (+/-) 12. CAREER PROGRESSION

Timing (at least by year's quarter/semester)

Q4 2027

Responsible

Unit

Indicator(s) / Target(s)

RIIND —
Network for
Gender
Equality,
Inclusion and
Non-
Discrimination
/ Information
Technology
office

Indicator: updated Plan approved; number of awareness/training actions. Target: Plan approved by Q4 2027; ≥6 actions/year.

Proposed actions

Action 4			Timing (at least by year's quarter/semester)
A4 - Institutional Monitoring and Support Mechanisms for Equality Reinforce the whistleblowing system and establish regular monitoring of equality and diversity indicators, in close collaboration with RIIND, to track progress and share good practices across Schools.	GAP Principle(s)		
	(+/-) 4. GENDER EQUALITY		Q1 2028
	Responsible		
	Unit	Indicator(s) / Target(s)	
	RIIND — Network for Gender Equality, Inclusion and Non-Discrimination	Indicator: annual equality monitoring report published; changes in the whistleblowing system. Target: Report by Q1 2028, annual thereafter; whistleblowing system reviewed and improved by 2028, with revised procedures, clearly defined reporting channels and awareness measures implemented.	

Proposed actions

Action 5

A5 - Support Hub for Researchers Provide accessible, coordinated information and support on institutional procedures, inclusion and accessibility services, recruitment, funding opportunities and researcher support, with particular attention to early-career researchers, international researchers and PhD students (bilingual information, onboarding, visas, accommodation, language training).

GAP Principle(s)

(+/-) 5. EMBRACING DIVERSITY

(+/-) 10. RECRUITMENT

Timing (at least by year's quarter/semester)

Q4 2027

Responsible

Unit

Indicator(s) / Target(s)

International
Relations
office /
Human
Resources

office /
Research &
Innovation

Management
office/
Academics
office

Indicator: hub launched; number of researchers assisted.
Target: hub operational by Q4 2027; ≥300 researchers assisted/year.

Proposed actions

Action 6

A6 - ULisboa Researcher Onboarding, Integration and Professional Development Programme Develop a structured onboarding, integration and professional development programme for PhD students, early-career researchers and newly appointed academic staff, covering research integrity, Open Science, responsible AI use, contractual/legal obligations, intellectual property (IP), funding, mobility, career development and mentoring, combining a common institutional component with School-specific activities.

GAP Principle(s)

(+/-) 6. THE RESEARCHER

(+/-) 7. FREE CIRCULATION OF RESEARCHERS

(+/-) 12. CAREER PROGRESSION

(+/-) 15. CONTRACTUAL AND LEGAL OBLIGATIONS

(+/-) 16. DISSEMINATION AND EXPLOITATION OF RESULTS

Timing (at least by year's quarter/semester)

Q2 2028

Responsible

Unit

Indicator(s) / Target(s)

Human

Resources

office /

Research &

Innovation

Management

office /

Academics

office /

Doctoral

Schools and

Programmes

Indicator: programme launched; number of participants/editions per year. Target: first edition by Q2 2028, annual thereafter; ≥70% participation of new researchers.

Proposed actions

Action 7

A7 - Researcher Engagement and Visibility Promote the active integration, recognition and visibility of PhD students, early-career researchers and newly recruited academic staff through institutional networking events, interdisciplinary research showcases and communication initiatives, strengthening their sense of belonging to ULisboa.

GAP Principle(s)

(+/-) 6. THE RESEARCHER

Timing (at least by year's quarter/semester)

Q4 2027

Responsible

Unit

Indicator(s) / Target(s)

Communication

office /

Research &

Innovation

Management

office

Indicator: number of networking/showcase events.

Target: ≥2 events/year; ≥200 participants/year.

Proposed actions

Action 8

A8 - Mobility and Talent Attraction Promote international, intersectoral and interdisciplinary mobility and attract international talent by enhancing the visibility of institutional mobility programmes and strategic partnerships (Unite!, ULisboa School of Shanghai, Erasmus+/Erasmus Mundus), expanding international PhD scholarships and joint supervision opportunities.

GAP Principle(s)

(+/-) 7. FREE CIRCULATION OF RESEARCHERS

(+/-) 10. RECRUITMENT

(+/-) 12. CAREER PROGRESSION

Timing (at least by year's quarter/semester)

Q4 2028

Responsible

Unit

Indicator(s) / Target(s)

International

Relations

office /

Research &
Innovation

Management

office /

Studies and

Planning

Office

Indicator: number of mobility agreements/scholarships offered; number of PhD students and scholarships; number of international researchers. Target: 10% increase in joint PhD supervision (co-tutelle agreements); 20% increase in international PhD students; 5% increase in international researchers (2025 baseline: 983) by 2028.

Proposed actions

Action 9

A9 - ULisboa SUSTENTA Network Consolidate the ULisboa SUSTENTA Network (established in 2025) as a cross-cutting platform embedding sustainability principles throughout the research lifecycle, promoting sustainable laboratory practices, responsible resource use, and alignment with the UN 2030 Agenda and SDGs.

GAP Principle(s)		Timing (at least by year's quarter/semester)
(+/-) 8. SUSTAINABILITY OF RESEARCH		Q4 2027
Responsible		
Unit	Indicator(s) / Target(s)	
SUSTENTA Network	Indicator: number of training/awareness/community-engagement activities. Target: ≥4 activities/year from 2027 onward.	

Proposed actions

Action 10

A10 - Institutional Guidelines for Responsible Research Assessment, Recruitment and Selection Support implementation of the ULisboa CoARA Action Plan by developing institutional guidelines aligned with the European Charter for Researchers and CoARA, providing practical recommendations for performance evaluation, recruitment, selection and career progression that recognise diverse contributions and encourage responsible use of qualitative and quantitative indicators.

GAP Principle(s)

(++) 2. FREEDOM OF SCIENTIFIC RESEARCH

(+/-) 9. RESEARCHERS' ASSESSMENT

(+/-) 10. RECRUITMENT

(+/-) 11. SELECTION

Timing (at least by year's quarter/semester)

Q3 2028

Responsible

Unit

Indicator(s) / Target(s)

Academics
office /
Human
Resources
office;
Research &
Innovation
Management
office

Indicator: guidelines approved and disseminated. Target: approved by Q3 2028; adopted by all Schools by 2028.

Proposed actions

Action 11

A11 - Institutional Recruitment and Career Progression Regulations Building on ULisboa's Open, Transparent and Merit-based Recruitment (OTM-R) Policy, review and update institutional recruitment, selection and career progression regulations to ensure alignment with responsible principles, clearer evaluation criteria, and greater consistency across Schools. The review will explicitly consider the specificities of the research career and fixed-term researchers, including evaluation, career development, progression and employment stability, supported by periodic monitoring of implementation and career transitions. The regulations and related measures will be reviewed considering the new Science Law and its implementing framework.

GAP Principle(s)

(++) 2. FREEDOM OF SCIENTIFIC RESEARCH

(+/-) 10. RECRUITMENT

(+/-) 11. SELECTION

(+/-) 12. CAREER PROGRESSION

Timing (at least by year's quarter/semester)

Q4 2028

Responsible

Unit

Indicator(s) / Target(s)

Academics office / Human Resources office / Legal services

Indicator: updated recruitment and career progression regulations approved, including provisions for fixed term.
Target: approved by Q4 2028, considering the new Science Law and its implementing framework as they become applicable.

Proposed actions

Action 12

A12 - Electronic Recruitment Platform Implement a University-wide digital platform for recruitment calls covering the full recruitment lifecycle, supporting selection panels through integrated document management, workflow monitoring and candidate communication, and enabling monitoring of OTM-R indicators (openness, transparency, international reach, diversity, efficiency).

GAP Principle(s)

(+/-) 10. RECRUITMENT

Timing (at least by year's quarter/semester)

Q2 2028

Responsible

Unit

Indicator(s) / Target(s)

IT services /

Human

Resources

office /

Academics

office

Indicator: platform launched; number of calls processed.

Target: operational by Q2 2028; 100% of

academic/research calls processed via the platform by 2029.

Proposed actions

Action 13

A13 - Guidelines for the Dissemination of Recruitment Opportunities Adopt institutional guidelines ensuring all recruitment notices are published bilingually (Portuguese and English), systematically advertised on EURAXESS and institutional websites, and circulated through institutional communication channels to attract a wider, more international candidate pool.

GAP Principle(s)

(+/-) 10. RECRUITMENT

Timing (at least by year's quarter/semester)

Q4 2027

Responsible

Unit

Indicator(s) / Target(s)

Human
Resources
office /
Academics
office /
Communication
office /
Research &
Innovation
Management
office

Indicator: % of calls published bilingually and on EURAXESS. Target: 100% compliance from Q1 2027 onward.

Proposed actions

Action 14

14 - Career Development and Progression Framework
Develop a ULisboa Career Development Framework for Researchers, supporting career guidance, mentoring and professional development at all career stages, promoting transparent progression, diverse career pathways (academic and non-academic), and support for transitions from temporary to more stable positions, including the provision of a teaching-free semester following extended parental leave, to support a sustainable return to academic and research activities.

GAP Principle(s)

(+/-) 12. CAREER PROGRESSION

(-/+) 14. STABILITY OF EMPLOYMENT

(-/+) 18. CAREER DEVELOPMENT AND ADVICE

**Timing (at least by
year's
quarter/semester)**

Q4 2028

Responsible

Unit

Indicator(s) / Target(s)

Human
Resources
office /

Research &
Innovation
Management
office /
Studies and
Planning
Office

Indicator: framework approved; % researchers reporting access to career guidance. Target: framework launched Q4 2028; increase satisfaction survey score for career guidance to ≥50%.

Proposed actions

Action 15

15 - Research Support Staff Development Programme
Develop a Research Support Staff Development Programme strengthening the professional development and recognition of research support staff, through structured onboarding, continuous training, communities of practice, and harmonisation of procedures across Schools, in line with the principles of the European Charter for Researchers.

GAP Principle(s)

(-/+) 13. WORKING CONDITIONS, FUNDING
AND SALARIES

**Timing (at least by
year's
quarter/semester)**

Q4 2028

Responsible

Unit

Indicator(s) / Target(s)

Human
Resources
office /
Research &
Innovation
Management
office

Indicator: programme launched; number of participants.
Target: first edition Q4 2028; ≥50 participants/year.

Proposed actions

Action 16

16 - Institutional Research Support Strengthen institutional research support services by promoting greater coordination between the Rectorate, Schools and Research Units, including through the Commission for Scientific Affairs of the Senate and the Forum of Research Units, and improving communication and access to specialised support throughout the research lifecycle (pre-award, project management, post-award).

GAP Principle(s)

(-/+) 13. WORKING CONDITIONS, FUNDING AND SALARIES

Timing (at least by year's quarter/semester)

Q2 2028

Responsible

Unit

Indicator(s) / Target(s)

Research & Innovation Management office

Indicator: coordination mechanism established; researcher satisfaction with support services. Target: mechanism operational by Q2 2028; 15% increase in satisfaction by 2029

Proposed actions

Action 17

17 - Researchers' Working Environment Promote a supportive, inclusive and attractive research environment by improving researchers' working conditions and access to advanced research infrastructures and digital resources, including high-performance computing, cloud computing and AI capabilities, and by developing co-creation and co-working spaces at the Technology Transfer Centre and across Schools, fostering collaboration, interdisciplinary exchange and interaction among researchers, PhD students and early-career researchers.

GAP Principle(s)

(-/+) 13. WORKING CONDITIONS, FUNDING AND SALARIES

Timing (at least by year's quarter/semester)

Q2 2028

Responsible

Unit

Indicator(s) / Target(s)

Human Resources office / Wellbeing and Mental Health Network / Research & Innovation Management office / Technology Transfer structures

Indicator: number of wellbeing initiatives and participation rate; availability and uptake of advanced computing and AI resources; number and utilisation of co-creation and co-working spaces. Target: ≥4 initiatives/year; 30% researcher participation.

Proposed actions

Action 18

18 - Supervision and Mentoring Programme Establish a ULisboa Supervision and Mentoring Programme to support early-career researchers and strengthen the quality of research supervision, combining supervisor training with structured mentoring, particularly during the first year of the PhD, including peer mentoring by senior PhD students and postdoctoral researchers.

GAP Principle(s)

(++) 2. FREEDOM OF SCIENTIFIC RESEARCH

(-/+) 20. SUPERVISION AND MENTORING

Timing (at least by year's quarter/semester)

Q4 2028

Responsible

Unit

Indicator(s) / Target(s)

Doctoral
Schools and
Programmes
/ Research &
Innovation
Management
office

Indicator: programme launched; number and proportion of active supervisors and mentors trained. Target: programme launched by Q4 2028; ≥25% of active supervisors and mentors trained by Q4 2029.

Proposed actions

Action 19

19 - Research Communication, Knowledge Valorisation and Public Engagement Strategy Develop a ULisboa Research Communication, Knowledge Valorisation and Public Engagement Strategy to strengthen the visibility, accessibility and societal impact of research, supporting Open Science, science communication, IP management, technology transfer and the creation of spin-offs.

GAP Principle(s)

(+/-) 16. DISSEMINATION AND EXPLOITATION OF RESULTS

Timing (at least by year's quarter/semester)

Q2 2028

Responsible

Unit

Indicator(s) / Target(s)

Communication office / Technology Transfer structures // Research & Innovation Management office

Indicator: strategy approved; number of public engagement activities. Target: approved Q2 2028; ≥10 activities/year.

Proposed actions

Action 20

20 - Recognition of Diverse Research Careers and Talent
Promote recognition of diverse research careers and forms of academic talent, fostering an institutional culture that values interdisciplinary, intersectoral and international experience, teaching, leadership, mentoring, Open Science, knowledge transfer and societal impact, in line with CoARA principles.

GAP Principle(s)

(+/-) 17. VALUING DIVERSE RESEARCH CAREERS

Timing (at least by year's quarter/semester)

Q4 2027

Responsible

Unit

Indicator(s) / Target(s)

Human
Resources
office /
Research &
Innovation
Management
office

Indicator: institutional recognition criteria updated. Target: adopted by 2028.

Proposed actions

Action 21

21 - Continuous Professional Development and Employability
Strengthen continuous professional development throughout the research career via the Career Development Framework, promoting lifelong learning, recognition of transferable skills, closer interaction with industry and non-academic sectors, and language training for international researchers.

GAP Principle(s)

(-/+) 19. CONTINUOUS PROFESSIONAL DEVELOPMENT

Timing (at least by year's quarter/semester)

Q4 2028

Responsible

Unit

Indicator(s) / Target(s)

Academics

office /

Human

Resources

office /

Doctoral

Schools and

Programmes

Indicator: number of training actions; participation rate by career stage. Target: ≥8 training actions/year; equal participation across career stages by 2029.

Unselected principles:

The establishment of an open recruitment policy is a key element in the strategy for the implementation of the principles of the European Charter for Researchers. Please also indicate how your organisation will use the OTM-R toolkit and how you intend to implement / are implementing the principles of OTM-R. It is helpful to include a brief commentary demonstrating this implementation even if there is some overlap with the actions listed above. If this is the case, please link the OTM-R checklist with the overall action plan (max. 1000 words).*

ULisboa recognises Open, Transparent and Merit-Based Recruitment (OTM-R) as a central pillar of its HR Excellence in Research process and as a key mechanism to strengthen excellence, internationalisation, diversity, and fairness in research careers across its 19 Schools. The implementation of OTM-R principles at ULisboa is, however, not new: many of these principles have long been embedded, albeit not yet in a fully structured and systematic way, in national legislation, institutional regulations and established University practices. As a signatory of the CoARA agreement since 2024, with an institutional CoARA Action Plan approved in 2025, ULisboa has already established a strategic framework guiding the gradual alignment of recruitment, selection and assessment practices with responsible research assessment principles. The implementation of the HR Excellence in Research Action Plan further reinforces this commitment by promoting greater harmonisation, transparency, consistency, and accessibility in recruitment and career development processes across a large institution comprising 19 Schools with substantial institutional autonomy.

The implementation of OTM-R principles at ULisboa is strongly linked to the actions foreseen under the "Researchers' Assessment, Recruitment and Selection" thematic area of the Action Plan. In particular, ULisboa is developing Institutional Guidelines for Responsible Research Assessment, Recruitment and Selection (Action 10), aligned with the European Charter for Researchers and CoARA, providing practical recommendations that recognise diverse contributions and encourage the responsible use of qualitative and quantitative indicators. These guidelines are complemented by the revision of Institutional Recruitment and Career Progression Regulations (Action 11), aiming to ensure clearer evaluation criteria and greater consistency across Schools, within the constraints and opportunities of the national legal framework for the scientific research career.

The institutional OTM-R approach is further supported by dedicated Guidelines for the Dissemination of Recruitment Opportunities (Action 13), ensuring that all recruitment notices are published bilingually (Portuguese and English), systematically advertised on EURAXESS and institutional websites, and widely circulated to attract a broader and more international pool of candidates. This is complemented by the implementation of a University-wide Digital Platform for Recruitment Calls (Action 12), covering the full recruitment lifecycle and enabling the monitoring of OTM-R indicators such as openness, transparency, international reach, diversity, and efficiency.

OTM-R principles are additionally reinforced through actions aimed at improving communication, accessibility, and awareness of institutional procedures. The Support Hub for Researchers (Action 5) will centralise and clarify key information on institutional procedures, recruitment, funding opportunities and researcher support, with particular attention to international researchers and PhD students, contributing to equal access to information across the research community. Similarly, the ULisboa Researcher Onboarding, Integration and Professional Development Programme (Action 6) will support newly recruited researchers and academic staff, by covering research integrity, contractual and legal obligations, career development, mobility and mentoring, combining a common institutional component with School-specific activities.

ULisboa will also use these institutional guidelines to support capacity building and awareness among both researchers and administrative staff involved in selection processes. In this context, the Action Plan includes the Career Development and Progression Framework (Action 14), supporting transparent progression and diverse career pathways at all career stages, and the Supervision and Mentoring Programme (Action 18), strengthening the quality of research supervision through structured training for supervisors and mentoring for early-career researchers and PhD students.

The implementation of OTM-R at ULisboa is also connected to broader institutional measures supporting career development, mobility, and equal opportunities. Initiatives such as the Mobility and Talent Attraction action (Action 8) — building on strategic partnerships including Unite!, the ULisboa School of Shanghai, and Erasmus+/Erasmus Mundus — and the Recognition of Diverse Research Careers and Talent action (Action 20) contribute to ensuring that researchers are supported throughout different career stages and that evaluation and progression mechanisms are aligned with merit, mobility experience, and diverse forms of academic contribution, in line with CoARA principles.

ULisboa also recognises the importance of transparency, accountability, and continuous improvement in recruitment and career management processes. The Institutional Monitoring and Support Mechanisms for Equality (Action 4), together with regular researcher surveys and the strengthened whistleblowing system, will contribute to monitoring institutional practices, collecting feedback, identifying challenges, and supporting evidence-based improvements across Schools. These actions reinforce the institution's commitment to openness, non-discrimination, and accountability in human resources management.

The implementation of OTM-R principles at ULisboa is therefore not limited to recruitment procedures alone, but is embedded within a broader institutional strategy focused on responsible research assessment, career development, internationalisation, diversity, and continuous institutional improvement across its Schools and Research Units. The Action Plan demonstrates a clear connection between the OTM-R checklist principles and the proposed institutional actions, ensuring that recruitment, evaluation, and career progression processes are increasingly aligned with European best practices and with the principles of the European Charter for Researchers.

If your organisation already has a recruitment strategy which implements the principles of OTM-R, please provide the web link where this strategy can be found on your organisation's website. Multiple links must be comma-separated.

URL:

https://www.ulisboa.pt/sites/default/files/inline-files/otr-m_policy_ulisboa.pdf (https://www.ulisboa.pt/sites/default/files/inline-files/otr-m_policy_ulisboa.pdf)

4. Implementation

General overview of the expected overall implementation process of the action plan (max. 1000 words).

The HR Excellence in Research implementation process at ULisboa is designed as a structured and University-wide initiative aimed at strengthening research careers, improving working conditions, and aligning institutional practices with the principles of the European Charter for Researchers (2023). The process builds on the results of the Gap Analysis and reflects ULisboa's commitment to continuous improvement, transparency, inclusiveness, and responsible research management across its 19 Schools.

The implementation process is organised around several complementary dimensions. First, the Gap Analysis and needs assessment identified institutional strengths and areas requiring further development across the four thematic areas of the Charter and Code. Based on these results, a comprehensive HR Excellence in Research Action Plan for the period 2026–2028 was developed, including defined actions, timelines, responsible units, indicators, and measurable targets.

Implementation will be supported by a dedicated governance structure composed of a Steering Committee, a Working Group (Executive Committee) and a Consulting Committee. The Steering Committee will ensure strategic oversight, institutional alignment and decision-making at Rectorate level. The Working Group will oversee the overall coordination of the implementation process, prepare recommendations for the Steering Committee, review progress, and facilitate communication and coordination among the different governance bodies. The Consulting Committee — bringing together representatives from the Schools, Research Units and central services — will coordinate the operational implementation of the Action Plan, monitor progress, and support interaction between the different academic and administrative units involved in the process.

The implementation of the HR Excellence in Research process must, however, consider the balance between University-level coordination, led by the Rectorate, and the governance structures and autonomy of the Schools. Given ULisboa's decentralised organisational structure, the HR Excellence in Research processes at University and School level are formally independent, while remaining closely interconnected. Although the Gap Analysis and Action Plan at ULisboa level provide a common framework applicable to all Schools, their implementation at School level must take into account specific institutional contexts, priorities and needs. Close coordination and monitoring of these complementary processes will therefore be essential to ensure coherence, avoid duplication, and support effective implementation across the University.

A strong emphasis will be placed on the implementation of OTM-R principles across the institution, building on ULisboa's status as a CoARA signatory and its institutional CoARA Action Plan. In this context, ULisboa will further strengthen recruitment and evaluation procedures through the development of dedicated institutional guidelines and regulatory frameworks, a University-wide digital recruitment platform, enhanced communication mechanisms, and targeted training for researchers, evaluators, and administrative staff. These measures aim to promote fairness, transparency, equal opportunities, and international attractiveness in research careers across all Schools.

The implementation process also includes a broad range of initiatives supporting researchers' professional development, well-being, inclusion, and career progression. Actions foreseen in the HR Excellence in Research Action Plan address areas such as supervision and mentoring, onboarding and continuous training, career development and guidance, international researcher integration and mobility, equality, diversity and inclusion, Open Science and research communication, and sustainability of research.

Monitoring and evaluation will constitute a central component of the implementation process. Progress will be assessed regularly through defined indicators and targets, periodic Steering Committee, Working Group and Consulting Committee meetings, researchers' surveys, and institutional monitoring tools such as the ULisboa Research Portal and the future equality and diversity monitoring mechanisms. This evidence-based approach will support continuous improvement, allow timely identification of challenges, and enable adjustments to actions whenever necessary.

The implementation process will involve the active participation of the research community and key institutional stakeholders across ULisboa's Schools and Research Units, ensuring that the HR Excellence in Research remains responsive to the needs of researchers across all career stages and disciplinary contexts. At the same time, ULisboa will continue to ensure alignment between institutional policies, national legal requirements, and European best practices in research management and researcher support.

Overall, the HR Excellence in Research implementation process is expected to contribute to a more transparent, inclusive, supportive, and internationally attractive research environment across ULisboa, reinforcing the University's commitment to research excellence and responsible human resources management

Make sure you also cover all the aspects highlighted in the checklist below, which you will need to describe in detail.

Note: Click on each question of the checklist to open the editor.

How will the implementation committee and/or steering group regularly oversee progress?*



Detailed description and justification (max. 500 words)

The Working Group, the Steering Committee and the Consulting Committee will play a central role in monitoring and overseeing the implementation of the HR Excellence in Research Action Plan at ULisboa.

The Working Group will meet on a bimonthly basis and will be responsible for:

- Monitoring the implementation status of the actions foreseen in the HR Excellence in Research Action Plan;
- Assessing progress against the defined indicators and targets;
- Identifying implementation challenges, risks, or delays — including those arising from ULisboa's structure across 19 Schools;
- Proposing corrective and mitigation measures whenever necessary;
- Ensuring coordination between the different responsible units, Schools, and stakeholders involved in the implementation process;
- Preparing periodic progress reports and supporting evidence-based monitoring;
- Supporting follow-up activities and the continuous improvement of the implementation process.

The Steering Committee will meet twice a year and will be responsible for:

- Reviewing the overall implementation progress of the HR Excellence in Research Action Plan;
- Providing strategic guidance and institutional oversight at Rectorate level;
- Assessing alignment between the Action Plan and ULisboa's institutional priorities and Strategic Plan;
- Supporting institutional decision-making related to HR Excellence in Research implementation across Schools;
- Monitoring consistency with the principles of the European Charter for Researchers, the institutional OTM-R strategy, and the ULisboa CoARA Action Plan;
- Reviewing progress reports and proposed mitigation measures;
- Reporting implementation progress to the institutional leadership whenever necessary.

The Consulting Committee will meet twice a year, with additional meetings convened as needed. It will be responsible for monitoring and coordinating the implementation of the Action Plan across ULisboa and its Schools, ensuring alignment between the University-wide and School-level processes.

Monitoring activities will be supported by clearly defined indicators and targets for each action, enabling systematic assessment of implementation progress and facilitating continuous improvement. This governance structure will ensure a continuous cycle of implementation, assessment, reporting, and improvement throughout the HR Excellence in Research process.

How do you intend to involve the research community, your main stakeholders, in the implementation process?*



Detailed description and justification (max. 500 words)

ULisboa is committed to ensuring that the implementation of the HR Excellence in Research Action Plan is carried out through a participatory, University-wide, and collaborative approach involving researchers, academic staff, administrative units, Schools, and institutional leadership.

The implementation process will actively involve the research community through continuous participation in monitoring, feedback, and improvement activities. Researchers from different career stages are included in the Steering Committee and Working Group, and researchers from all Schools integrate the Consulting Committee, ensuring that the perspectives and needs of a diverse and multidisciplinary research community are considered throughout the implementation process.

In addition, the implementation of the HR Excellence in Research Action Plan will rely on the active involvement of the main institutional services and departments responsible for the different actions foreseen in the plan. Rather than being centralised within a single administrative unit, the implementation process is distributed across several institutional structures, including the Vice-Rectorate for Research and Innovation; the Vice-Rectorate for Academic Affairs; The Research and Innovation Management Office; The Academics office; the Human Resources office; the Studies and Planning Office; the Network of Ethics Committees; the Network for Gender Equality, Inclusion and Non-Discrimination (RIIND); the iRe:SEARCH Interdisciplinary Research Data Management Centre; the International Relations office; the Doctoral Schools and Programmes; the Communication office; the Technology Transfer structures; and the SUSTENTA Network coordination. This collaborative approach aims to ensure institutional alignment, shared responsibility, and effective execution of the proposed actions across ULisboa's Schools and Research Units.

The Working Group will play an important role in facilitating communication between researchers, services, and institutional leadership; the Steering Committee will provide strategic oversight and ensure alignment with ULisboa's institutional priorities and research strategy; and the Consulting Committee will focus on the communication between the University leadership and the Schools.

Researcher engagement will also be supported through regular communication and monitoring activities, including institutional surveys, dissemination of implementation progress, and opportunities for feedback on ongoing actions and institutional practices. These mechanisms will support evidence-based improvements and contribute to a culture of openness, transparency, inclusiveness, and continuous improvement across a large and diverse University.

By involving researchers and key stakeholders throughout the implementation process, ULisboa aims to ensure that the HR Excellence in Research Action Plan remains responsive to the needs of the research community and effectively contributes to improving researchers' working conditions, career development, and institutional support structures.

How do you proceed with the alignment of organisational policies with the HR Excellence in Research award process? Make sure it is recognised in the organisation's research strategy as the overarching HR policy. *



Detailed description and justification (max. 500 words)

ULisboa recognises the HR Excellence in Research as a core element of its institutional research strategy and as the overarching framework guiding human resources policies and practices related to researchers. The principles of the European Charter for Researchers and OTM-R are being progressively integrated into institutional policies, regulations, procedures, and support mechanisms across the University's Schools and central services, in close articulation with ULisboa's status as a CoARA signatory.

The alignment of organisational policies with HR Excellence in Research is being implemented through the HR Excellence in Research Action Plan, based on the results of the institutional Gap Analysis. The Action Plan addresses key areas related to recruitment and selection, career development, responsible research assessment, working conditions, inclusion and diversity, internationalisation, training, well-being, and researcher support services.

To ensure strong institutional anchoring and strategic alignment, ULisboa has established a Steering Committee composed by the institutional leadership and representatives from key strategic areas, including the Vice-Rector for Research & Innovation, the Vice-Rector for Education, the Human Resources office, the Academics Office, Communication Office, the International Relations office, the Research & Innovation office, the Studies and Planning Office. The Steering Committee is responsible for overseeing the implementation of HR Excellence in Research, ensuring alignment between institutional policies and the European Charter for Researchers principles, and supporting the integration of HR Excellence in Research into ULisboa's broader institutional strategy and governance framework.

The implementation of the Action Plan is supported by a Working Group and a multidisciplinary Consulting Committee. The Working Group oversees the coordination of the implementation process, reviews progress, prepares recommendations for the Steering Committee, and ensures effective communication among the different governance bodies. It comprises representatives from different research career stages and key institutional services, supports the operational implementation of the Action Plan, and promotes institution-wide engagement in its delivery. The Consulting Committee facilitates coordination across the Schools and central services.

The HR Excellence in Research principles are also being integrated into institutional regulatory frameworks and procedures, particularly in areas related to recruitment, researchers' assessment, career progression, supervision and mentoring, training, international researcher support, and diversity and inclusion policies. Several actions foreseen in the Action Plan directly contribute to strengthening alignment between institutional practices and European best practices in research management and researcher support.

The implementation process involves all relevant academic and administrative units, ensuring that HR Excellence in Research is not managed as an isolated initiative, but is embedded within ULisboa's institutional policies, strategic priorities, and continuous improvement processes. Monitoring mechanisms, indicators, surveys, and regular reporting activities will support evidence-based

assessment of progress and allow continuous adaptation of institutional policies whenever necessary.

Through this integrated approach, ULisboa aims to strengthen a research environment that is transparent, inclusive, internationally attractive, and supportive of researchers' professional development at all career stages, across its 19 Schools.

How will you ensure that the proposed actions are implemented?*



Detailed description and justification (max. 500 words)

Each action included in the HR Excellence in Research Action Plan has a designated responsible unit, ensuring clear ownership, accountability, and effective coordination of implementation activities within the defined timeline.

Implementation will be supported by a structured monitoring framework based on clearly defined indicators, targets, timelines, and responsible stakeholders. This framework will enable systematic assessment of progress, identification of potential delays or implementation challenges — particularly those arising from coordination across a large, quasi-federated institution — and the adoption of timely corrective measures whenever necessary. The use of measurable indicators will support transparency, evidence-based decision-making, and continuous improvement throughout the implementation process.

The Working Group and the Consulting Committee will meet on a bimonthly basis to monitor the progress of the Action Plan, follow up on the implementation status of each action, and facilitate coordination between the different Schools and institutional units involved. The Working Group includes representatives from key institutional areas and research career stages, ensuring broad institutional engagement and shared responsibility across the implementation process.

In addition, semestral meetings with the Steering Committee will ensure strategic oversight and institutional alignment. During these meetings, the Working Group will present progress reports describing the implementation status of the actions, achieved milestones, identified challenges, and proposed mitigation measures. Based on these reports, the Steering Committee will provide strategic guidance, support decision-making processes, and ensure alignment between the HR Excellence in Research implementation process and ULisboa's institutional priorities and research strategy.

This governance and monitoring structure establishes a continuous cycle of planning, implementation, assessment, reporting, and improvement, ensuring that the proposed actions are effectively executed and consistently aligned with the principles of the European Charter for Researchers and the HR Excellence in Research framework.

How will you monitor progress (timeline)?*



Detailed description and justification (max. 500 words)

ULisboa will monitor the implementation of the HR Excellence in Research Action Plan through a structured and continuous monitoring process based on clearly defined indicators, targets, timelines, and responsible units for each action.

Progress monitoring will be coordinated by the Working Group and the Consulting Committee, which will meet on a bimonthly basis to assess the implementation status of the actions, review progress against the established indicators and targets, identify potential delays or challenges, and propose corrective measures whenever necessary. These meetings will support regular follow-up and coordination between the different Schools and institutional units involved in the implementation process.

At a strategic level, the Steering Committee will meet twice per year to review the overall progress of the HR Excellence in Research Action Plan, assess alignment with institutional priorities, and provide strategic guidance for the continuation of the implementation process.

Monitoring activities will be supported through:

- Yearly progress reports prepared by the Working Group;
- Meeting minutes documenting implementation status, challenges, mitigation measures, and follow-up actions;
- Systematic assessment of indicators and targets associated with each action;
- Periodic review of timelines and implementation priorities whenever necessary;
- Feedback collected through institutional surveys and stakeholder engagement activities across Schools.

This monitoring framework will support evidence-based decision-making, facilitate continuous improvement, and ensure that the implementation process remains aligned with the principles of the European Charter for Researchers and the institutional objectives of ULisboa.

How will you measure progress (indicators) in view of the next assessment?*



Detailed description and justification (max. 500 words)

ULisboa will measure the progress of the HR Excellence in Research implementation process through a structured monitoring framework based on qualitative and quantitative indicators, measurable targets, and regular assessment activities associated with each action of the HR Excellence in Research Action Plan.

Each action included in the Action Plan is associated with:

- Defined indicators and measurable targets;
- A responsible institutional unit;
- An implementation timeline;
- Periodic monitoring and reporting activities.

Progress will be assessed through the systematic monitoring of implementation outputs, participation levels, regulatory developments, training activities, researcher support initiatives, and institutional engagement indicators across Schools. Examples of indicators include:

- Number of regulations, guidelines, and institutional procedures developed or revised;
- Number of training sessions, mentoring activities, and career development initiatives implemented;
- Participation rates of researchers and staff in institutional programmes and surveys;
- Number of researchers benefiting from career support, mentoring, mobility, or integration initiatives;
- Number of institutional communication and dissemination activities carried out;
- Degree of implementation of OTM-R principles and responsible research assessment practices, in line with the ULisboa CoARA Action Plan;
- Availability and accessibility of institutional information and support tools in English;
- Diversity, inclusion, and well-being monitoring indicators;
- Satisfaction rates collected through institutional surveys and feedback mechanisms.

Implementation progress will be monitored regularly by the Working Group and the Consulting Committee through bimonthly meetings, and assessed by the Steering Committee through semestral strategic reviews. This governance framework will enable ULisboa to evaluate progress against milestones and targets, identify implementation gaps or delays across Schools, coordinate corrective actions, and ensure the effective implementation of the Action Plan.

In addition, institutional surveys and stakeholder feedback mechanisms will provide complementary qualitative evidence regarding researchers' perceptions, working conditions, career development support, and the effectiveness of implemented measures. This feedback will support evidence-based adjustments and continuous improvement of institutional policies and practices.

The combination of measurable indicators, regular monitoring activities, stakeholder engagement, and periodic reporting will ensure a comprehensive assessment of progress in preparation for the next HR Excellence in Research evaluation and will support the long-term integration of HR Excellence in Research principles within ULisboa's institutional strategy and human resources policies.

Additional remarks/comments about the proposed implementation process (max. 1000 words)

The implementation of ULisboa's HR Excellence in Research Action Plan for 2026–2028 will follow an institution-wide, participatory and evidence-based approach, recognising both the diversity of the University's 19 Schools and their significant degree of autonomy. The process builds on the institutional Gap Analysis, which combined a review of existing policies and practices with consultation of the research community, and translates the identified needs into 21 actions with defined responsibilities, timelines, indicators and targets.

A key priority is to ensure effective coordination between the Rectorate, the Schools, Research Units and the central services responsible for implementation. The governance structure, comprising a Steering Committee, a Working Group and a Consulting Committee, will provide strategic oversight, operational coordination and regular engagement with institutional stakeholders. This structure is intended to foster shared responsibility, promote coherence across the University and support the adaptation of common objectives to different disciplinary and organisational contexts, while avoiding unnecessary duplication between University-level and School-level initiatives.

Implementation will be phased according to the priorities and timelines established in the Action Plan. Particular attention will be given to actions requiring cross-institutional coordination, regulatory developments or the establishment of new institutional services and tools. These include responsible research assessment and recruitment, career development, researcher onboarding and integration, supervision and mentoring, equality and inclusion, Open Science, and the strengthening of research support services. Where implementation depends on national legislation, institutional regulations or other external conditions, progress will be assessed in light of the applicable framework, with adjustments introduced when necessary.

Monitoring and evaluation will be integral to the process. The Working Group and the Consulting Committee will meet regularly to review implementation, assess progress against indicators and targets, identify risks and delays, and propose corrective measures. The Steering Committee will provide strategic guidance and review progress twice a year. Annual progress reports, documented follow-up actions, institutional data and feedback from researchers will support transparent reporting and evidence-based decision-making.

The active involvement of the research community will remain essential throughout implementation. Researchers at different career stages, representatives of the Schools and Research Units, and relevant academic and administrative services will contribute through the governance structures, surveys, consultation and feedback mechanisms. This will help ensure that the Action Plan remains responsive to researchers'

needs and that implementation challenges are identified early.

The process will also ensure close alignment between HR Excellence in Research, ULisboa's institutional strategy and its commitment to responsible research assessment under the Coalition for Advancing Research Assessment (CoARA). The aim is to embed the European Charter for Researchers and its principles progressively in institutional policies, regulations and everyday practices, rather than treating HR Excellence in Research as a standalone initiative.

ULisboa also recognises freedom of scientific research, including freedom of thought and expression and the autonomy to define and pursue research questions, as a fundamental principle underpinning research excellence and integrity. Building on the positive findings of the institutional Gap Analysis, this principle will be further safeguarded through the Responsible Research and Innovation Framework (Action 1), the Guidelines for Responsible Research Assessment, Recruitment and Selection (Action 10), and complementary measures supporting Open Science, fair career progression and research supervision (Actions 2, 11 and 18). Together, these actions will help ensure that institutional policies and practices continue to protect intellectual autonomy, disciplinary diversity, and critical inquiry.

ULisboa sees implementation as a continuous cycle of action, monitoring, consultation and improvement. Its success will depend not only on delivering the planned actions and targets, but also on achieving lasting institutional change: more transparent and consistent procedures, stronger support for researchers throughout their careers, improved working conditions, and a more inclusive, open and internationally attractive research environment across the University.