HR Excellence in Research

Action Plan

Action Plan

Case number

2025PT382359

Name Organisation under review

Instituto de Geografia e Ordenamento do Território da Universidade de Lisboa

Organisation’s contact details

Edifício IGOT - Rua Branca Edmée Marques - Cidade Universitária, Lisboa, Lisboa, 1600-276, Portugal

Submission date to the European Commission

12/11/2026

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 *	115
Of whom are international (i.e. foreign nationality) *	15
Of whom are externally funded (i.e. for whom the organisation is host organisation) *	58
Of whom are women *	59
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) *	17
Of whom are R2 = recognised researcher (e.g. postdoctoral researcher, junior researcher) *	33
Of whom are R1 = first stage researcher (e.g. doctoral candidate, research apprentice) *	31
Total number of students (if relevant) *	14
Total number of staff (including management, administrative, teaching, and research staff) *	71

RESEARCH FUNDING (figures for the most recent fiscal year)	€
Total annual organisational budget	6680649
Annual organisational direct government funding (designated for research)	0

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)	2369847
Annual funding from private, non-government sources, designated for research	354034

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

The Institute of Geography and Spatial Planning (IGOT-ULisboa) is the School of Geography and Spatial Planning of the University of Lisbon, which is recognised as one of the leading universities in Europe and worldwide. IGOT-ULisboa carries out teaching, research and innovation activities of excellence in several fields of the Social Sciences, Earth System Sciences and Spatial Planning, with a particular focus on territory and the environment.

IGOT-ULisboa was established in 2008 as an organic unit (*Unidade Orgânica*) of the University of Lisbon, following the revision of the University's Statutes approved by Normative Order (*Despacho Normativo*) No. 36/2008, of 21 July.

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)

Strengths. IGOT-ULisboa demonstrates a consolidated ethical and professional culture, reflecting an institutional commitment to research integrity that has developed steadily over recent years. This is confirmed by both the institutional survey and the qualitative assessment carried out for this application, which together point to a coherent set of practices embedded across the school's governance, research and training structures:

- Researchers across all career stages are highly aware of the ethical practices and standards of their scientific areas, of the relevant codes of ethics, and of data protection and confidentiality legislation. This awareness is sustained by a formal Ethics Commission, created in 2023, which organises training events and is responsible for Ethics Approval. In 2026, the Commission gained an additional evaluator and streamlined its procedures, aiming to reduce review times to one month.
- Freedom of scientific research is fully implemented: the Statutes of both IGOT and the Centre of Geographical Studies (CEG) establish freedom of academic and scientific practice as a fundamental principle, and researchers report no obstacles to freedom of thought and expression.
- Open science practices are firmly embedded, with most researchers reporting that the institution supports and encourages open access. The CEG funds book publications through its own publisher and, since 2026, directly funds open access articles indexed as Q1 and Q2 in the Web of Science, complemented by research group and project budgets and by the FCT B-on transformative agreements.
- Gender equality is promoted at all levels of staff, including supervisory and managerial levels, as acknowledged by most researchers. A formal Equality Commission, established in 2021, manages the Gender Equality Plan and organises regular training and awareness events.
- The research environment is highly inclusive: most researchers believe there is no form of discrimination in the school, and a dedicated Participation Channel enables staff and students to report discrimination.
- Professional responsibility is strong. Researchers are highly aware of their accountability for the originality, relevance and intellectual property of their work, and of the school's strategic goals and funding mechanisms, supported by regular plenary meetings, the biannual Assembly of Education and Research, the CEG Scientific Commission and a yearly meeting with early-career (R1) researchers.
- Sustainability of research is fully implemented: IGOT participates in the University of Lisbon's RedeSustenta network, the CEG's objectives are aligned with the UN Sustainable Development Goals and the European Green Deal, and videoconferencing across all rooms has substantially reduced travel needs.

Weaknesses. The consultation nevertheless identified areas for improvement, revealing persistent challenges that point to specific gaps in implementation, resourcing and internal communication. These findings underscore the need for continued policy refinement and for sustained monitoring to ensure that recently adopted measures translate into lasting improvements across the following areas:

- Delays have occurred in the assessment of Ethics Approval applications, affecting the scheduling of data collection. The recent reinforcement of the Ethics Commission is expected to shorten review times considerably.
- Ethics training has been geared towards senior researchers and does not yet reach all researcher profiles, and current guidelines do not address ethical questions arising from specific methodologies. A 2026-2027 training plan will extend ethics training to PhD students and Master courses, with question-and-answer sessions dedicated to different methodological contexts.
- The institution still lacks its own guidelines on the ethical use of artificial intelligence. A University of Lisbon Guide for the use of AI in Research is under preparation with IGOT participation, alongside IGOT's own Guide for the use of AI in Geographical Education.
- Infrastructure and personnel support for data organisation, inventorying and publication remain insufficient. IGOT has invested in a large server, is planning a new integrated data infrastructure, and intends to hire an information manager to assist researchers with data management.
- Funding limitations for open access publication persist in some research areas, and training and mentoring on open access principles is not yet sufficient, nor are there objective policies promoting citizen science. The recent extension of direct funding for journal articles, together with planned training sessions on open access and citizen science, including the preparation of policy briefs, will address these needs.
- Awareness of the Gender Equality Plan among PhD students requires improvement, and its public consultation is currently online only. The Equality Commission will renew its training programme with emphasis on PhD students and will organise public events to discuss future revisions of the Plan.
- The findings indicate that approximately one quarter of researchers are either unaware of, or lack confidence in, the available complaints and appeals mechanisms. They also highlight the need to improve the transparency of procedures following the submission of a complaint and to strengthen awareness of nationality-based discrimination and the safeguards available to address it.
- Researchers report difficulties in obtaining support for project applications and administration. Yearly sessions on project management and applications will be organised, supported by a new digital platform to expedite administration.

Researchers assessment, recruitment, and progression*

Strengths and Weaknesses (max. 800 words)

Strengths. Recruitment, selection and assessment practices at IGOT-ULisboa are broadly aligned with the European Charter for Researchers and with the principles of open, transparent and merit-based recruitment, reflecting a recruitment culture that has matured in line with national legislation and international good practice. This alignment emerges consistently across career stages and appointment types, as shown by the following findings:

- The institutional survey shows a wide perception that job advertisements are open, transparent and merit-based, and that recruitment procedures are efficient, supportive and internationally comparable.
- The research staff largely agrees that the evaluation of candidates is transparent and that selection committees include competent and diverse specialists.
- Merit is assessed through both qualitative and quantitative criteria, qualifications are judged on the basis of individual achievements, and mobility experiences are regarded as valuable to professional development.
- The hiring process is international and follows national legislation, and researchers at all career stages consider that international experience and transdisciplinary knowledge are duly recognised in candidate appraisal.
- Career progression is fully implemented, being strictly defined by national legislation, namely the Statutes of the Career of University Professor and the Statutes of the Researcher Career, which IGOT applies closely, complemented by regular assessment across all career stages. The staff includes professors at every stage of the career, and in 2025 the institute strengthened its permanent research staff by hiring three assistant researchers (R2).
- Co-authorship is well recognised across research projects, and existing regulation on professor assessment already establishes criteria for the recognition of different types of career breaks.
- Job interviews are increasingly adopted in research scholarship selection processes, broadening evaluation beyond purely documentary assessment.

Weaknesses. The qualitative consultation identified specific inconsistencies with Charter principles, concentrated on junior positions and scholarship recruitment, pointing to a gap between the more established procedures governing professor and researcher appointments and the less formalised practices still applied to scholarship holders. These inconsistencies, while limited in scope, warrant targeted corrective measures, as detailed below:

- Just over a quarter of researchers consider that career breaks and non-linear career paths are not sufficiently recognised.
- While professors and researchers consider performance assessment metrics adequate, scholarship recipients report that the metrics applied to them are neither clear nor standardised. Their assessment tends to focus mainly on scientific publications, leaving other relevant contributions, such as reports, science communication, fieldwork, technical tasks and institutional service,

less visible. Guidelines for the assessment of scholarship recipients will be published, establishing broad criteria that encompass the full range of research contributions and activities.

- Recruitment timelines, stages and deadlines for the publication of results are not always sufficiently predictable for candidates, and job advertisements do not always include detailed information on working conditions and career development perspectives. Guidelines for job advertisements covering scientific scholarships, researcher and professor positions will be published, requiring detailed information on working conditions, including available resources, logistical support and fieldwork material, together with indicative timelines and expected dates for each stage of the recruitment process.
- The selection process relies almost exclusively on CV review, with complementary evaluation methods such as interviews or lectures rarely included. The recruitment strategy will promote the use of interviews whenever appropriate to the vacancy profile, consolidating a practice already growing in scholarship selection.
- Applicants for professor and researcher positions receive feedback on the strengths and weaknesses of their applications, but applicants to scholarship contracts currently do not. A new template for the minutes of scientific scholarship selection procedures will instruct selection panels to provide feedback to candidates for junior positions after the process concludes, highlighting both strengths and areas for improvement.
- Researchers consider that work experience gained in the public and private sectors outside academia is not sufficiently recognised in candidate appraisal and research evaluation.

Working conditions and practices*

Strengths and Weaknesses (max. 800 words)

Strengths. The institutional survey shows that the vast majority of researchers agree that IGOT-ULisboa provides a safe and stimulating research environment with appropriate working conditions, and that remuneration is fair and attractive, reflecting an institutional culture that pays sustained attention to both the material and organisational dimensions of research work. This positive assessment extends across contractual, infrastructural and governance domains, as illustrated below:

- Work-life balance is an explicit institutional commitment. The Gender Equality Plan for 2025-2030 includes criteria for scheduling meetings that respect working hours and personal availability, ensures that requests for information are made only during appropriate working hours and never on weekly rest days, and promotes the dissemination of positive testimonials on work-life balance practices.
- The institute is investing significantly in research infrastructure in the current funding period (2025-2029), including the acquisition of equipment and the development of a new GeoFutures Lab.
- Contractual and legal frameworks are solidly applied. IGOT follows the Statutes of the Career of University Professor, the Statutes of the Researcher Career and the Statutes of the Research Scholarship, and researchers are widely familiar with national, sectoral and institutional regulations and with the obligation to share and apply research results in line with contractual commitments.
- The Human Resources Unit oversees hiring and contractualisation, welcomes new researchers and clarifies any questions about their contracts, and the institutional website provides the relevant national and internal regulation, including a Gender Integration Welcome Paper.
- Participation in governance is well established for senior staff: all R2, R3 and R4 researchers are members of the CEG Scientific Commission and the IGOT Education and Research Assembly, both of which play a fundamental role in decision-making on research and education.
- Regarding dissemination and exploitation of results, most researchers consider that all those actively involved have their rights recognised in co-authorship and that intellectual property rights are properly protected, and all researchers are aware of the need to communicate findings to the wider public.

Weaknesses. The consultation identified issues concentrated on work-life balance, the employment stability of early-career researchers and the provision of information, revealing that structural conditions and legal constraints continue to affect junior researchers more acutely than their senior counterparts. Corresponding measures have been defined to address these issues, several of which depend on institutional action while others are shaped by national legislation beyond the institute's direct control:

- Researchers report an imbalance between professional and personal life stemming from the accumulation of working demands. Beyond the measures of the Gender Equality Plan, the institute will include time management workshops in its training offer.
- Risk analysis for fieldwork activities conducted outside the institute's facilities is lacking. The CEG will develop and implement a guide for good practices in risk assessment.
- Scholarship grant salaries are not always perceived as fully adequate given the cost of living, qualifications and responsibilities of researchers, and grantees may experience uncertainty regarding social protection, benefits and employment-related rights. Both conditions are defined by national legislation, which prevents the institute from acting directly upon them.
- Access to funding for fieldwork and equipment can be difficult, and the costs of fieldwork and dissemination activities are not always clearly covered in advance. The CEG will issue instructions on the procedures for requesting funding and accessing equipment, complementing the substantial ongoing investment in the GeoFutures Lab.
- One in five researchers does not believe the institution strives to improve research job stability. This perception reflects delays to expected grant start dates, which affect the financial and professional stability of early-career researchers; limited support for career continuity after the end of a grant or contract; and the use of short-term scholarships, which generates insecurity and unsupported transitions between grants, contracts and PhD opportunities. New guidelines for scholarship advertisements will set out working conditions and indicative recruitment timelines; mentoring and career counselling mechanisms will provide information on opportunities inside and outside academia; and end-of-grant recognition mechanisms will summarise the activities carried out, skills developed and outputs produced.
- Information on national, sectoral and institutional regulations, intellectual property rights and the internal organisation of IGOT is not always provided at the start of the contract. An onboarding package containing the applicable regulations, intellectual property and copyright information, institutional rules and useful contacts will be presented to each new researcher through an induction tour guided by an established researcher.
- One fifth of researchers are unaware of, or do not believe in, opportunities to participate in governance and decision-making bodies, with early-career researchers less represented. The CEG will hold more regular consultations, including annual meetings with R1 researchers and annual community-wide consultations with the presence of the external advisory board.
- Further training on copyright, intellectual property and open access is needed, particularly for early-career researchers. Dedicated training sessions on these topics, including scientific publication and dissemination beyond academia, will be implemented for R1 and R2 researchers.

Research careers and talent development*

Strengths and Weaknesses (max. 800 words)

Strengths. IGOT-ULisboa offers a research environment in which diverse research careers and continuous professional development are genuinely valued, an orientation that runs through the institute's approach to mobility, training and supervision alike. This commitment is expressed through concrete practices and structures that support researchers at every career stage, as outlined below:

- The institutional survey shows that researchers widely believe the institution values mobility across sectors, disciplines, locations and virtual settings. This perception is grounded in practice: IGOT and the CEG actively promote links between their staff and the public and private sectors, regularly providing services to external entities.
- The research community broadly recognises that the institute provides valuable opportunities for the continuous development, updating, and expansion of researchers' skills and competencies through training initiatives, professional development activities, and access to learning resources that support both scientific excellence and career progression.
- Early-career (R1) researchers are frequently invited to participate in curricular and extra-curricular teaching activities, providing early exposure to pedagogical practice.
- In 2025, IGOT organised its first training workshop on the mentoring of students, aimed at R2, R3 and R4 researchers.
- Mentoring structures are emerging from the equality agenda: the Gender Equality Plan for 2025-2030 establishes mentoring plans for women researchers, in implementation since the inception of the Equality Commission.
- In supervision, researchers report a structured and regular relationship between researchers in training and their supervisors, with senior peers facilitating knowledge transfer and the career development of early-stage colleagues, and the coordination of PhD courses provides continuous support to both students and supervisors.

Weaknesses. This pillar concentrates the most significant weaknesses identified in the gap analysis, particularly affecting early-career researchers who face the compounded effects of limited career guidance, unstructured mentoring, and uneven access to pedagogical opportunities, namely:

- The institutional survey identifies a critical gap in the implementation of a career development strategy, career guidance, career counselling and job placement assistance, confirmed by the qualitative assessment. Early-career researchers in particular report that career decisions are often shaped by financial insecurity and uncertainty about future opportunities.
- Individual career development plans are absent, which is especially relevant for R1 and R2 researchers, who require support in planning the steps that follow the end of a scholarship or contract. Mandatory career development plans will be implemented for all R1 and R2 researchers.
- Systematic career counselling is lacking, particularly regarding the identification of the skills researchers need to acquire, such as how to apply for research projects and future funding. Mentoring and career guidance events involving researchers from different

career stages and sectors will be substantially expanded.

- Researchers at all career stages lack know-how for intersectoral mobility and entrepreneurial skills. Building on the intersectoral experience accumulated through service provision, the institute will promote active training on entrepreneurship and the development of private sector careers.
- R1 researchers report the need for structured access to opportunities to develop pedagogical and teaching-related skills, as teaching invitations currently occur in a spontaneous rather than organised manner. Supervised and regulated teaching-related opportunities for PhD scholarship grantees will be implemented wherever legally and institutionally possible, converting current spontaneous practice into a structured pathway for pedagogical development.
- Senior researchers (R2, R3 and R4) report the need for further training on mentoring and supervising strategies. The institute will provide regular training on the mentoring and supervision of postgraduate students and early-career researchers, which will also strategically reinforce the career counselling measures above.
- In supervision and mentoring, less emphasis is placed on supervisors having the time and commitment to offer appropriate support: supervisors have reduced availability, supervision meetings are affected by delays and are not always scheduled in advance, feedback is often informal and irregular rather than delivered through structured meetings, and structured mentoring for personal and professional development remains limited. Guidelines on good practices in supervision and mentoring will be created, including a recommended limit on the number of students per supervisor, ensuring that supervisors have the availability to provide regular, structured feedback.

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.igot.ulisboa.pt/hr-excellence-research (https://www.igot.ulisboa.pt/hr-excellence-research)

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	GAP Principle(s)	Timing (at least by year's quarter/semester)
STREAMLINING OF THE ETHICS APPROVAL PROCESS. Building on the recent reinforcement of the Ethics Commission, this action consolidates a faster, more predictable Ethics Approval process, with enhanced training in the institute, streamlined application forms, and internal deadlines reducing first response times to a maximum of one month. The Ethics Commission will organize a 2027–2028 training plan, extending ethics training beyond senior researchers to PhD students and Master courses, with open Q&A sessions addressing methodology-specific ethical issues, converting ethics training into a systematic programme reaching all researcher profiles. The Ethics Commission will monitor review times continuously.Gaps addressed: 1.1., 1.2, 1.3.	(+/-) 1. ETHICS AND RESEARCH INTEGRITY	Q2 2027

Responsible Unit	Indicator(s) / Target(s)
Ethics Commission	Indicators: • Indicator 1.1. Share of applications first response given within one month. • Indicator 1.2. Ethics training sessions organized. • Indicator 1.3. Number of researchers and coverage of researcher profiles (R1-R4) in training attendance. Targets: • Indicator 1.1.: ≥80% of applications first response given within one month in 2027 onwards, ≥90% of applications first response given within one month in 2028 onwards. • Indicator 1.2.: ≥2 per year in 2027 and 2028. • Indicator 1.3.: ≥20 Researchers per year considering all sessions organized; 50% coverage of R1 researchers by 2028.

Proposed actions

Action 2	GAP Principle(s)	Timing (at least by year's quarter/semester)
GUIDELINES ON THE ETHICAL USE OF ARTIFICIAL INTELLIGENCE. IGOT will publish and disseminate internally two reference documents: (i) the University of Lisbon Guide for the use of AI in Research, developed with in collaboration across all schools of the university, and (ii) IGOT's own Guide for the use of AI in Geographical Education. Once available, both will be formally adopted, disseminated to all researchers and integrated into postgraduate teaching and ethics training, establishing clear limits and best practices for AI use in research and education.Gaps addressed: 1.4.	(+/-) 1. ETHICS AND RESEARCH INTEGRITY	Q4 2027

Responsible Unit	Indicator(s) / Target(s)
IGOT AI Working Group	Indicators: • Indicator 2.1. ULisboa Guide for the use of AI in Research adopted. • Indicator 2.2. IGOT Guide for the use of AI in Geographical Education published. • Indicator 2.3. Number of downloads of the IGOT Guide for the use of AI in Geographical Education. Targets: • Indicator 2.1. ULisboa Guide for the use of AI in Research: adopted Q1 2027. • Indicator 2.2. IGOT Guide for the use of AI in Geographical Education: published Q2 2027. • Indicator 2.3. Number of downloads of the IGOT Guide for the use of AI in Geographical Education: ≥150 downloads by Q4 2027.

Proposed actions

Action 3	GAP Principle(s)	Timing (at least by year's quarter/semester)
INTEGRATED DATA INFRASTRUCTURE AND INFORMATION MANAGER. IGOT and the CEG will develop a new data infrastructure with an integrated database supporting the organization, inventorying and publication of research data. An information manager will be hired to assist researchers with data management plans, metadata, repository deposit and compliance with funder and open science requirements. Together, these measures address the current insufficiency of infrastructure and personnel support for data stewardship and strengthen the institutional foundations of open science practice Gaps addressed: 3.1.	(+/-) 3. OPEN SCIENCE	Q4 2029

Responsible Unit	Indicator(s) / Target(s)
Director of the Research Unit Centre of Geographical Studies	Indicators: • Indicator 3.1. New integrated data infrastructure. • Indicator 3.2. Data manager hired. • Indicator 3.3. Researchers supported annually in data organization, access and use of the infrastructure and publication. • Indicator 3.4. Datasets inventoried or deposited in repositories with institutional support. Targets: • Indicator 3.1.: Integrated data infrastructure, operational by Q4 2029. • Indicator 3.2.: Data manager, hired by Q4 2028. • Indicator 3.3.: ≥30 Researchers in average supported annually by Q4 2031. • Indicator 3.4.: ≥10 Datasets inventoried or deposited annually by Q4 2031.

Proposed actions

Action 4	GAP Principle(s)	Timing (at least by year's quarter/semester)
OPEN ACCESS, CITIZEN SCIENCE AND OUTREACH STRATEGY. The CEG will develop a strategy to promote and support diverse forms of open access to science, including dissemination and research, thereby strengthening the capacity of researchers to engage society throughout the research process while also being aware of intellectual property and copyright. The strategy will include: (i) the creation of a dissemination network where relevant outreach outputs will be shared; and (ii) the organization of regular training sessions on open access principles and citizen science, including but not limited to practical components on the preparation of policy briefs and others forms of outreach. Gaps addressed: 3.2, 3.3, 3.4, 16.1.	(+/-) 3. OPEN SCIENCE (+/-) 16. DISSEMINATION AND EXPLOITATION OF RESULTS	Q4 2031

Responsible Unit	Indicator(s) / Target(s)
Director of the Research Unit Centre of Geographical Studies	Indicator: • Indicator 4.1. Dissemination strategy to publicize outreach outputs. • Indicator 4.2. Number of training sessions on open access and citizen science. • Indicator 4.3. Researchers trained in open access and citizen science. • Indicator 4.4. Number of outreach contracts involving IGOT researchers. Targets: • Indicator 4.1. Dissemination strategy online by 2029. • Indicator 4.2. Training sessions: ≥1 of each per year from 2027. • Indicator 4.3. Researchers trained: ≥25% of research staff by the interim assessment in 2029; 50% of research staff by 2031. • Indicator 4.4. Outreach contracts: ≥6 per year by 2031.

Proposed actions

Action 5	GAP Principle(s)	Timing (at least by year's quarter/semester)
IMPLEMENTATION OF THE 2025-2030 GENDER EQUALITY PLAN. The IGOT Gender Equality Plan establishes equality as a core value, and is structured around 10 intervention areas: Mission and Organizational Culture of IGOT; Leadership and participation in management and coordination bodies; Recruitment and academic pathways; Recruitment and career progression for researchers; Recruitment and career progression for technical and administrative staff; Gender and Research; Integration of a gender perspective into course curricula; Work-life and family balance; Sexism and sexual harassment; and Intersectional perspectives. Together, these areas aim to diagnose existing inequalities, drive concrete actions for change, and ensure ongoing monitoring of institutional progress toward a fairer and more inclusive academic community. Gaps addressed: 4.1, 4.2, 5.3, 13.1.	(+/-) 4. GENDER EQUALITY (-/+) 5. EMBRACING DIVERSITY (+/-) 13. WORKING CONDITIONS, FUNDING AND SALARIES	Q4 2030

Responsible Unit	Indicator(s) / Target(s)
Equality Commission	Indicators: • Indicator 5.1. Number of awareness and training events organised by the Equality Commission. • Indicator 5.2. Number of researchers involved in awareness and training events. Targets: • Indicator 5.1.: ≥2 per year, of which ≥1 targeted at PhD students. • Indicator 5.2.: ≥20 community members per year.

Proposed actions

Action 6	GAP Principle(s)	Timing (at least by year's quarter/semester)
STRENGTHENED PARTICIPATION CHANNEL. The Participation Channel for reporting discrimination will be updated with additional information, including a flowchart describing the procedures followed after the submission of a complaint, increasing transparency for potential users. The Channel will be included in the future Onboarding Package presented to all new researchers. The Equality Commission will also mainstream awareness and prevention of nationality-based discrimination and harassment across its activities and documents. Gaps addressed: 5.1, 5.2.	(-/+) 5. EMBRACING DIVERSITY	Q4 2027

Responsible Unit	Indicator(s) / Target(s)
Equality Commission	Indicators: • Indicator 6.1. Updated Participation Channel with complaints flowchart. • Indicator 6.2. Participation Channel included in the Onboarding Package. • Indicator 6.3. Elaboration of a simplified bi-annual report, respecting all the ethics requirements, of the activities of the Commission on the specific domain of participation and complaints. Targets: • Indicator 6.1: Updated Participation Channel published by end of 2027. • Indicator 6.2: Participation Channel included in the Onboarding Package: 100% of new researchers informed from 2027. • Indicator 6.3: Simplified Report made available online by 2027.

Proposed actions

Action 7	GAP Principle(s)	Timing (at least by year's quarter/semester)
DIGITAL MANAGEMENT PLATFORM FOR PROJECT APPLICATIONS AND ADMINISTRATION. IGOT is acquiring a digital management platform to expedite project administration and improve communication between researchers and the project management office, which will be implemented alongside a new plan for the organization of yearly sessions on project management and on the preparation of project applications, aimed especially at young researchers. Together, these measures reduce administrative burden, shorten response times and build researchers' capacity to secure and manage funding. Gaps addressed: 6.1.	(+/-) 6. THE RESEARCHER	Q4 2028

Responsible Unit	Indicator(s) / Target(s)
IGOT Executive Director	Indicators: • Indicator 7.1. Annual sessions on project management and applications. • Indicator 7.2. Digital project management platform. Targets: • Indicator 7.1. Annual sessions: ≥1 per year from 2027. • Indicator 7.2. Digital project management platform, online by 2028.

Proposed actions

Action 8	GAP Principle(s)	Timing (at least by year's quarter/semester)
NEW REGULATION FOR THE PERFORMANCE ASSESSMENT OF RESEARCHERS. The University of Lisbon and IGOT are developing a new regulation for the performance assessment of researchers, in line with the European Charter for Researchers and the principles of the CoARA (Coalition for Advancing Research Assessment) Agreement, that will include explicit criteria for the recognition of different types of career breaks, extending to researchers the provisions already established in professor assessment regulation. Gaps addressed: 7.1, 9.1.	(+/-) 7. FREE CIRCULATION OF RESEARCHERS (+/-) 9. RESEARCHERS' ASSESSMENT	Q2 2027

Responsible Unit	Indicator(s) / Target(s)
IGOT Scientific Commission	Indicators: • Indicator 8.1. New regulation for researcher performance assessment. Targets: • Indicator 8.1.: New regulation approved by 2027.

Proposed actions

Action 9	GAP Principle(s)	Timing (at least by year's quarter/semester)
GUIDELINES FOR THE ASSESSMENT OF RESEARCH PROJECT SCHOLARSHIP RECIPIENTS. Guidelines for the assessment of research project scholarship recipients in renovation and end periods will be published with the involvement of the target group members, in line with the European Charter for Researchers and the principles of the CoARA (Coalition for Advancing Research Assessment) Agreement, establishing clear and standardised criteria that encompass the full range of research contributions, including reports, science communication, fieldwork, technical tasks and institutional service, beyond scientific publications alone. Gaps addressed: 9.2.	(+/-) 9. RESEARCHERS' ASSESSMENT	Q2 2028

Responsible Unit	Indicator(s) / Target(s)
Director of the Research Unit Centre of Geographical Studies	Indicators: • Indicator 9.1. Guidelines for scholarship recipient assessment. • Indicator 9.2. Number of scholarship assessment processes applying the guidelines. Targets: • Indicator 9.1.: Guidelines published by Q2 2028. • Indicator 9.2.: Scholarship assessment processes applying the guidelines: 100% from 2028.

Proposed actions

Action 10	GAP Principle(s)	Timing (at least by year's quarter/semester)
RENEWED TEMPLATES FOR JOB ADVERTISEMENTS. New templates for job advertisements covering scientific scholarships, researcher and professor positions will be internally published. They will require detailed information on working conditions, including available resources, logistical support and fieldwork material, together with indicative timelines and expected dates for each stage of the recruitment process. Gaps addressed: 10.1, 10.2, 14.1.	(+/-) 10. RECRUITMENT (-/+) 14. STABILITY OF EMPLOYMENT	Q2 2028

Responsible Unit	Indicator(s) / Target(s)
Executive Director of the Institute of Geography and Spatial Planning	Indicators: • Indicator 10.1. New guidelines for job advertisements internally published. • Indicator 10.2. % of job advertisements complying with the guidelines. Targets: • Indicator 10.1.: Guidelines published by end of Q2 2028. • Indicator 10.2.: Job advertisements complying with the guidelines: 100% from 2028

Proposed actions

Action 11	GAP Principle(s)	Timing (at least by year's quarter/semester)
NEW GUIDELINES FOR MINUTES OF SCIENTIFIC SCHOLARSHIP SELECTION PROCEDURES. New guidelines for the minutes of scientific scholarship selection procedures will instruct panels to provide constructive feedback to candidates for junior positions after the process concludes, highlighting strengths and areas for improvement, thereby extending to scholarship applicants the feedback already provided to professor and researcher candidates. Gaps addressed: 11.1, 11.2.	(+/-) 11. SELECTION	Q4 2027

Responsible Unit	Indicator(s) / Target(s)
Director of the Research Unit Centre of Geographical Studies	Indicators: • Indicator 11.1. New template for scholarship selection minutes. • Indicator 11.2. % of scholarship candidates receiving structured feedback. Targets: • Indicator 11.1.: New template adopted by end of 2027. • Indicator 11.2.: Candidates receiving structured feedback: 100% of concluded procedures from 2027.

Proposed actions

Action 12	GAP Principle(s)	Timing (at least by year's quarter/semester)
WORK–LIFE BALANCE AND RESEARCH TIME MANAGEMENT. Complementing the Gender Equality Plan 2025–2030 measures on meeting scheduling that respects working hours and personal availability, on restricting information requests to appropriate working periods, and on disseminating positive work–life balance testimonials, the institute will introduce a soft landing policy for researchers returning from paternity/maternity leaves and introduce time management workshops in its regular training offer. This action tackles the imbalance between professional and personal life, by combining institutional scheduling discipline with individual capacity building. Gaps addressed: 13.1.	(+/-) 13. WORKING CONDITIONS, FUNDING AND SALARIES	Q4 2030

Responsible Unit	Indicator(s) / Target(s)
equality Commission	Indicators: • Indicator 12.1. Implementation of the Gender Equality Plan 2025-2030. • Indicator 12.2. Number of time management workshops offered: ≥1 per year from 2027. Targets: • Indicator 12.1. Gender Equality Plan implemented by 2030. • Indicator 12.2.: ≥1 workshops per year from 2027.

Proposed actions

Action 13	GAP Principle(s)	Timing (at least by year's quarter/semester)
GUIDE FOR GOOD PRACTICES IN FIELDWORK RISK ASSESSMENT. The CEG will develop and implement a guide for good practices in risk assessment for fieldwork activities conducted outside the institute's facilities. The guide will cover risk identification, prevention measures, safety protocols, insurance information, and emergency procedures for the diverse fieldwork settings characteristic of geographical research. Gaps addressed: 13.2.	(+/-) 13. WORKING CONDITIONS, FUNDING AND SALARIES	Q2 2028

Responsible Unit	Indicator(s) / Target(s)
Director of the Research Unit Centre of Geographical Studies	Indicators: • Indicator 13.1. Fieldwork risk assessment guide. • Indicator 13.2. Number of training or dissemination sessions on the guide. Targets: • Indicator 13.1.: Guide published by Q2 2028. • Indicator 13.2.: ≥1 training sessions per year after publication

Proposed actions

Action 14	GAP Principle(s)	Timing (at least by year's quarter/semester)
PROCEDURES FOR EQUIPMENT ACCESS. The CEG will issue clear instructions on the procedures for requesting access to existing equipment. This complements the substantial ongoing investment in research infrastructure for 2025–2029, including the new GeoFutures Lab, guaranteeing that the expanded equipment base is matched by transparent, predictable access rules available to all researchers regardless of career stage or research group. Gaps addressed: 13.5.	(+/-) 13. WORKING CONDITIONS, FUNDING AND SALARIES	2 2028

Responsible Unit	Indicator(s) / Target(s)
Director of the Research Unit Centre of Geographical Studies	Indicators: • Indicator 14.1. Instructions leaflet on requests for equipment access. • Indicator 14.2. % of requests processed under the new procedures. Targets: • Indicator 14.1. Leaflet published by Q2 2028. • Indicator 14.2. Requests processed under the new procedures: 100% from 2028.

Proposed actions

Action 15	GAP Principle(s)	Timing (at least by year's quarter/semester)
ONBOARDING PACKAGE AND WELCOME TOUR FOR NEW RESEARCHERS. An onboarding package will be created for all new researchers, containing the applicable national, sectoral and institutional regulations on rights and duties, intellectual property and copyright information, institutional rules and guidelines, and useful contacts, including the Participation Channel. The package will be presented to each new researcher through a welcome tour guided by an established researcher of the institute, ensuring that essential information is provided at the start of every contract rather than acquired informally over time. Gaps addressed: 5.1, 15.1.	(-/+) 5. EMBRACING DIVERSITY (-/+) 15. CONTRACTUAL AND LEGAL OBLIGATIONS	Q4 2028

Responsible Unit	Indicator(s) / Target(s)
Executive Director of the Institute of Geography and Spatial Planning	Indicators: • Indicator 15.1. Onboarding package finalized. • Indicator 15.2. % of new researchers receiving the package and welcome tour. Targets: • Indicator 15.1.: Package finalised by end of 2028. • Indicator 15.2.: New researchers receiving the package and induction tour: 100% from 2028.

Proposed actions

Action 16	GAP Principle(s)	Timing (at least by year's quarter/semester)
REGULAR CONSULTATIONS AND PARTICIPATION IN GOVERNANCE. The CEG will organise regular consultations enabling the research community to steer the research and organisational strategy. These will include annual meetings dedicated to R1 researchers, and annual community-wide consultations involving researchers at all career stages with the presence of the CEG external Advisory Board. Gaps addressed: 15.2.	(-/+) 15. CONTRACTUAL AND LEGAL OBLIGATIONS	Q2 2027

Responsible Unit	Indicator(s) / Target(s)
Director of the Research Unit Centre of Geographical Studies	Indicators • Indicator 16.1. Number of annual meetings with R1 researchers. • Indicator 16.2. Number of annual community-wide consultations with the CEG Advisory Board. Targets: • Indicator 16.1.: Annual meetings with R1 researchers: ≥1 per year from 2027. • Indicator 16.2.: Annual community-wide consultations: ≥1 per year from 2027.

Proposed actions

Action 17	GAP Principle(s)	Timing (at least by year's quarter/semester)
INDIVIDUAL CAREER DEVELOPMENT PLANS AND SYSTEMATIC CAREER COUNSELLING. Mandatory individual career development plans will be implemented for all R1 and R2 researchers, supporting the planning of the steps that follow the end of a scholarship or contract. Career plans will identify career targets, pathways to targets, and skills required to achieve targets. In parallel, a mentoring and career guidance scheme involving researchers from different career stages and sectors will be implemented, providing systematic counselling on required skill acquisition, including how to apply for research projects and future funding. Gaps addressed: 14.2, 14.3, 18.1, 18.2.	(-/+) 14. STABILITY OF EMPLOYMENT (--) 18. CAREER DEVELOPMENT AND ADVICE	Q4 2028

Responsible Unit	Indicator(s) / Target(s)
Director of the Research Unit Centre of Geographical Studies	Indicators: • Indicator 17.1. Career development plan model approved. • Indicator 17.2. % of R1 and R2 researchers with an active career development plan. • Indicator 17.3. % of R1 and R2 researchers involved in the mentoring scheme. Targets: • Indicator 17.1.: Plan model approved by end of 2027. • Indicator 17.2.: R1 and R2 Researchers with an active career development plan: 100% by 2028. • Indicator 17.3.: Researchers involved in the mentoring scheme: 50% by 2028.

Proposed actions

Action 18	GAP Principle(s)	Timing (at least by year's quarter/semester)
TRAINING ON ENTREPRENEURSHIP AND INTERSECTORAL CAREERS. The institute will promote active training in entrepreneurship and the development of private and public sector careers. This responds to the lack of know-how for intersectoral mobility and entrepreneurial skills reported by researchers at all career stages, converting existing institutional links with society into structured learning opportunities. Gaps addressed: 17.1.	(+/-) 17. VALUING DIVERSE RESEARCH CAREERS	Q4 2028

Responsible Unit	Indicator(s) / Target(s)
Director of the Research Unit Centre of Geographical Studies	Indicators: • Indicator 18.1. Number of training events on entrepreneurship and intersectoral careers. • Indicator 18.2. Number of R1, R2, R3 and R4 researchers trained. Targets: • Indicator 18.1. Training events: ≥1 per year from 2028. • Indicator 18.2. Researchers trained across all career stages: ≥10 R1 researchers, ≥20 R2, R3 and R4 researchers

Proposed actions

Action 19	GAP Principle(s)	Timing (at least by year's quarter/semester)
STRUCTURED TEACHING OPPORTUNITIES FOR PHD SCHOLARSHIP GRANTEES. Supervised and regulated teaching-related opportunities for PhD scholarship grantees will be implemented wherever legally and institutionally possible and always respecting the other tasks of the grantees (e.g. PhD thesis elaboration, publication demands). Participation will be supervised by experienced professors, documented for career purposes, and aligned with grantees' development plans, ensuring equitable access to teaching experience across the PhD community. Gaps addressed: 19.1.	(+/-) 19. CONTINUOUS PROFESSIONAL DEVELOPMENT	Q4 2029

Responsible Unit	Indicator(s) / Target(s)
IGOT Scientific Commission	Indicators: • Indicator 19.1. Regulatory framework for supervised teaching opportunities. • Indicator 19.2. % of PhD grantees accessing structured teaching opportunities. Targets: • Indicator 19.1. Regulatory framework approved by 2027. • Indicator 19.2. PhD scholarship grantees involved in teaching: ≥20% by the interim assessment; 40% by 2029.

Proposed actions

Action 20	GAP Principle(s)	Timing (at least by year's quarter/semester)
TRAINING AND GUIDELINES FOR SUPERVISION AND MENTORING. The institute will provide regular training on the mentoring and supervision of postgraduate students and early-career researchers for R2, R3 and R4 researchers. Guidelines on good practices in supervision and mentoring will be created, including a recommended limit on the number of students per supervisor, ensuring availability for regular, structured, pre-scheduled meetings and formal feedback, and promoting structured mentoring for personal and professional development. Gaps addressed: 19.2, 20.1, 20.2, 20.3.	(+/-) 19. CONTINUOUS PROFESSIONAL DEVELOPMENT (-/+) 20. SUPERVISION AND MENTORING	Q4 2031

Responsible Unit	Indicator(s) / Target(s)
IGOT Coordinator of 3rd Cycle of Studies	Indicators: • Indicator 20.1. Number of training sessions on supervision and mentoring: ≥1 per year from 2028. • Indicator 20.2. Guidelines on supervision and mentoring. • Indicator 20.3. % of senior researchers (R2–R4) trained. Targets: • Indicator 20.1.: Training sessions: ≥1 per year from 2028. • Indicator 20.2.: Guidelines on supervision and mentoring published by 2028. • Indicator 20.3.: Senior researchers (R2–R4) trained: ≥50% by 2031.

Proposed actions

Action 21	GAP Principle(s)	Timing (at least by year's quarter/semester)
DIGITAL PLATFORM FOR THE SUBMISSION OF JOB APPLICATIONS. IGOT-ULisboa will develop a digital platform for the submission of job applications, covering calls for scientific scholarships, researcher and professor positions. The platform will provide a single, bilingual (Portuguese and English) entry point where candidates can submit their applications and supporting documents online, receive automatic acknowledgement of receipt and follow the status of their application at each stage of the selection process. Built in compliance with the General Data Protection Regulation, the platform will also support selection panels in the secure handling and evaluation of applications and in the timely notification of results. Gaps addressed: OTM-R Checklist Q4.	(+/-) 10. RECRUITMENT	Q4 2029

Responsible Unit	Indicator(s) / Target(s)
Executive Director of the Institute of Geography and Spatial Planning	Indicators: • Indicator 21.1. Digital platform for the submission of job applications. • Indicator 21.2. % of recruitment procedures (scholarships, researcher and professor positions) managed through the platform. Targets: • Indicator 21.1.: Digital platform for the submission of job applications, online by Q4 2029. • Indicator 21.2.: Recruitment procedures managed through the platform: 100% from 2030.

Unselected principles:

(++) 2. FREEDOM OF SCIENTIFIC RESEARCH (++) 8. SUSTAINABILITY OF RESEARCH (++) 12. CAREER PROGRESSION

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).*

Open recruitment is already a part of IGOT-ULisboa's institutional practice, although our institution remains committed to continuous improvement. Our OTM-R Policy was developed during 2026 as a part of the application to the HR Excellence in Research award and is now published online in Portuguese and English at a dedicated page in IGOT's website: https://www.igot.ulisboa.pt/hr-excellence-research (https://www.igot.ulisboa.pt/hr-excellence-research)). IGOT's OTM-R Policy clearly departs from the principles and guidelines of the OTM-R toolkit, which will remain as a reference document to the application and improvement of the Policy. The self-assessment showed that the challenge lies in the instruments that put it into practice, which is where the Action Plan concentrates.

1. How IGOT will use the OTM-R toolkit

The toolkit has so far been applied as a diagnostic instrument. The checklist was applied to every stage of recruitment and exposed limitations that legal compliance alone had hidden: no e-recruitment (Q4), no quality control or outcome assessment system (Q5, Q23), internal guidance that covers professor competitions only (Q2), no specific training for those involved in recruitment (Q3), and avoidable administrative burden for candidates (Q15).

In the subsequential implementation period that covers the next two years, the toolkit will be applied in two ways:

- *As a design standard.* The toolkit will guide the design of the recruitment instruments that the Action Plan delivers in this period. This includes renewed templates for job advertisements covering scientific scholarships, researcher and professor positions to be internally published by Q2 2028 (Action 10), new guidelines for the minutes of scientific scholarship selection procedures to be adopted by the end of 2027 (Action 11), an onboarding package presented through a welcome tour guided by an established researcher (Action 15), and lastly the development of the bilingual digital platform for the submission of job applications, due online by Q4 2029 (Action 21).
- *As a monitoring instrument.* The Implementation Committee will repeat the checklist at the interim assessments, alongside the Action Plan indicators, so that movement in each answer from "No" or "partially" towards "Yes, completely" becomes the measure of progress.

2. How IGOT is implementing, and intends to implement, the OTM-R principles

Open. Recruitment is already open in its reach: calls are bilingual and internationally advertised, and the fact that 12.5% of 2024–2025 applicants were foreign nationals to some extent demonstrates the openness of procedures. It is not yet open in its access, because applications must be delivered in person or by registered mail, a barrier that falls most heavily on candidates abroad. Action 21 removes this

barrier with a single bilingual, GDPR-compliant platform for scholarship, researcher and professor calls, covering 100% of procedures from 2030. Openness to underrepresented groups currently rests on compliance with equal opportunity legislation; Action 5 adds active measures through the Gender Equality Plan's intervention areas on recruitment and career progression, and Action 6 mainstreams the prevention of nationality-based discrimination.

Transparent. Candidates today receive the legally required information, but not in a form that is easy to use, and they cannot follow their application as it progresses. Action 10 obliges every advertisement to state resources, logistical support and expected dates for each stage, while Action 21 adds automatic acknowledgement of receipt and status tracking. Feedback is the other transparency gap: notification of results complies with the law, but constructive feedback has not reached scholarship candidates. Action 11 tackles this by requiring panels to record strengths and areas for improvement for every candidate in concluded scholarship procedures from 2027.

Merit-based. Calls for professors and researchers specify absolute and relative merit criteria in advance, and jury appointment and composition follow the career statutes. These rules are strongest for career positions and weakest for scholarships, where most early-career researchers enter. Actions 10 and 11 extend standardised templates and selection minutes to scholarships, and Action 9 establishes clear criteria for scholarship holders' assessment that value fieldwork, technical tasks, science communication and institutional service. Action 8 aligns researcher assessment with the Charter and CoARA and reinforces the already existing recognition of career breaks, so that merit is judged in the same broad terms at recruitment and afterwards.

Overall, the application of the Action Plan will allow us to strengthen the openness, transparency and excellence of our recruitment policy, while the implementation will also generate an outcome assessment system that will serve as a quality control framework.

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.igot.ulisboa.pt/hr-excellence-research (https://www.igot.ulisboa.pt/hr-excellence-research)

4. Implementation

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

The implementation of the IGOT-ULisboa Action Plan is conceived as a continuous cycle of execution, assessment, reporting and improvement, running from 2027 to 2031 and structured around the interim assessment in Q4 2028. The Plan comprises 21 actions resulting from the Gap Analysis and the OTM-R checklist.

The guiding principle is that implementation rests on existing institutional structures, clear ownership and continuous support, rather than on a parallel, ad hoc structure. The HR Excellence in Research process is recognised as the overarching framework for IGOT-ULisboa's human resources policy for researchers and as a core part of its research strategy, aligned with the University of Lisbon's own application.

1. Governance structure

Three levels of governance will steer implementation:

- Responsible Units – every action is assigned to a unit, commission or working group that already holds competence over the relevant area: the Ethics Commission, the Equality Commission, the Scientific Commission, the Human Resources Unit, the Executive Director, the Director of the Centre of Geographical Studies (CEG), the IGOT AI Working Group and the Coordination of the 3rd Cycle of Studies. Each action is thus embedded in the unit's regular activity plans, decision-making processes and quality assessment systems, which frequently involve consultation with research staff.
- Implementation Committee (IC) – constituted by the Working Group that completed the Gap Analysis. It operates at the operational level, providing continuous support to the Responsible Units: helping them translate each action into concrete steps, clarifying the requirements of the European Charter for Researchers and the OTM-R principles, and checking that the outputs produced (guidelines, templates, regulations, training programmes) meet the defined targets.
- Steering Committee (SC) – maintains the same composition as during the Gap Analysis, including the President of IGOT-ULisboa, the Executive Director and the Director of the CEG, who hold the authority to allocate resources, approve regulations and resolve obstacles.

IGOT-ULisboa will keep liaising with the University of Lisbon Consulting Committee for the HR Excellence in Research award, which involves all Schools of the University and meets twice a year. This body ensures coherence between University-wide and School-level processes and enables experience- and knowledge-exchange among Schools.

2. Phased timeline

Actions are sequenced realistically, moving from quick, low-cost measures to structural measures requiring investment or legal adaptation, as described in further detail below.

Initial actions are focused on streamlining processes through the creation of new regulations, guidelines and streghtening participantion channels, as well as the consolidation of procedures and research support structures. Later actions are focused on the development of important infrastructures that require testing and refinement, and the achievement of targets related to improve training among the human resources of the institute. On the longer term, the Action Plan continually contributes towards the reinforcement of equality, work-life balance and open science activities within the institution.

Several actions build directly on commitments the Institute has already made – the reinforcement of the Ethics Commission, the Gender Equality Plan, the acquisition of the digital project platform, the investment in research infrastructure and the GeoFutures Lab (2025–2029), and University-wide work on AI guidelines and the new assessment regulation – which reduces the risk that actions remain on paper for lack of funding or institutional will.

3. Monitoring and reporting cycle

Monitoring follows a multi-level cycle. Before each trimestral IC meeting, Responsible Units report on the status of their actions using a simple common template recording completed steps, indicator values, upcoming milestones and obstacles. The IC consolidates this into a monitoring table covering all 21 actions, classifying each as completed, on track, delayed or at risk, and delivers short progress reports to the SC. Twice a year the SC reviews these reports, discusses delayed or at-risk actions and decides on corrective measures; its decisions are minuted and fed back to the Responsible Units through the IC. Progress is also reported to the University’s Consulting Committee.

Progress is measured through three types of indicators: milestone indicators, activity indicators, and outcome/coverage indicators. Quantitative data from existing records are complemented by qualitative evidence from the annual consultations foreseen in Action 16.

4. Involvement of the research community

The community is involved through three complementary mechanisms: representation of researchers at all career stages in the SC and IC; the distributed responsibility of units and commissions that already consult research staff through their own quality systems; and reinforced participation channels, including annual meetings with R1 researchers, community-wide consultations with the CEG external Advisory Board, the expanded Participation Channel and new digital platforms. The dedicated HR Excellence in Research webpage will host the Gap Analysis, Action Plan, OTM-R Policy and progress updates.

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 Implementation Committee will be constituted by the Working Group which completed the Gap Analysis (Executive Committee), appointed by the Despacho 26/2025, entitled ‘Designação do Grupo de Trabalho - HR Excellence in Research’, dated September 23, 2025. The Implementation Committee’s (IC) main responsibility will entail providing support to the Responsible Units in the implementation of the Actions of the Plan. The IC will provide guidance on the shape that the Actions should take and the defined targets, focusing on ensuring that the Responsible Units understand the requirements set by the European Charter for Researchers. In addition to this, the Implementation Committee will meet each trimester to:

- Collect information regarding the status of the application of each Action in the Plan, taking the Action’s timeline into account;
- Monitor the implementation status of the actions foreseen in the Action Plan;
- Assess progress against the defined indicators and targets;
- Deliver short progress reports to the Steering Committee.

The Steering Committee will maintain the same constitution and meet twice a year and will be responsible for:

- Review the overall implementation progress of the HR Excellence in Research Action Plan, based on the short progress reports;
- Identify implementation challenges, risks, or delays and propose corrective and mitigation measures whenever necessary;
- Support institutional decision-making related to HR Excellence in Research implementation.

Throughout the process of implementation, IGOT will keep liaising with the University of Lisbon Consulting Committee for the application to the HR Excellence in Research award, which involves all the Schools of the University. The University of Lisbon intends the Consulting Committee to meet twice a year, with additional meetings convened as needed. The Consulting Committee will play a strategic role in ensuring the alignment between the University-wide and School-level processes, and provide experience- and knowledge-exchange among Schools.

Throughout the HR Excellence in Research process, this governance structure will keep implementation, assessment, reporting and improvement running as a continuous cycle.

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

Detailed description and justification (max. 500 words)

The research community has been at the centre of IGOT-ULisboa's application process from the outset, and we intend to keep it there throughout implementation. The participatory approach will consist of three complementary mechanisms.

1. Representation in the committees overseeing implementation. The Steering Committee and the Working Group appointed by Despacho 26/2025 will remain in place to oversee implementation, with members being substituted by others if they become unavailable. Both bodies include representatives of the various governing bodies and units of IGOT-ULisboa and CEG, as well as representatives of the research staff at every career stage (R1 to R4). These representatives will be a direct channel between the community and the bodies responsible for each action, bringing concerns forward. The membership of both bodies will be reviewed periodically, so that representatives who leave the institute or change career stage are replaced and new voices can join.

2. Communication with governing bodies of the Institute. The Action Plan strategically involves the coordination of several units, commissions and working groups across IGOT-ULisboa as Responsible Units, to active a sense of shared responsibility for the implementation of the Action Plan. This includes IGOT-ULisboa's Human Resources Unit, Scientific Commission, Ethics Commission, and the Equality Commission, the Centre of Geographical Studies, the IGOT-ULisboa AI Working Group, and IGOT-ULisboa's Coordination of the 3rd Cycle of Studies. Each of these units, commissions and working groups implement their own quality assessment systems which often involve consultations of different sorts with the research staff. For this reason, their integration in the implementation of the Action Plan will strengthen the connection between the Action Plan and the research community.

3. Strengthened participation across governing bodies. The Action Plan itself is geared towards increasing participation in the Institute, despite the positive assessment regarding this topic. Several actions involve regular training sessions which will also be important moments to assess the needs of researchers regarding those topics. IGOT-ULisboa will also reinforce communication with researchers by implementing a new digital management platform for project applications and administration, an information management system, and expanding the Participation Channel for reporting discrimination.

It must also be highlighted that Action 16 is specifically devoted to the organization of consultations enabling the research community to steer the research and organisational strategy, including annual meetings dedicated to R1 researchers, and annual community-wide consultations involving researchers at all career stages with the presence of the CEG external Advisory Board.

In addition to these three complementary mechanisms, IGOT-ULisboa will continuously feed the dedicated HR Excellence in Research page on the institutional website. It will host the Gap Analysis, Action Plan and OTM-R Policy, together with progress updates. The Steering Committee will review the results of these mechanisms at its annual meetings.

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)

IGOT-ULisboa is dedicated to the implementation of the principles of the European Charter for Researchers and acknowledges the need to implement open, transparent and merit-based research recruitment and assessment. The largely positive evaluation that the research community makes of IGOT-ULisboa to some extent attests that ongoing dedication. The Gap Analysis recognized strategic points to improve the implementation of the European Charter for Researchers and reinforce the openness, transparency and the merit-based nature of recruitment and assessment in the institution. The Action Plan resulting from the Gap Analysis was approved by the Steering Committee, which itself is composed by representatives of the main administrative bodies of IGOT-ULisboa, as well as representatives of the research community. The Action Plan defines a series of Responsible Units, ensuring that every unit, commission and working group is aligned with and shares responsibilities in the implementation of the HR Excellence in Research process.

The Steering Committee, the Implementation Committee and the Responsible Units, together with the research community, through the three participatory mechanisms described above, are collectively responsible for ensuring the HR Excellence in Research process is thoroughly implemented.

It is thus expected that the HR Excellence in Research will inform and structure the management of human resources in research at IGOT-ULisboa at multiple levels, including working conditions, recruitment and selection processes, research evaluation, and support and mentorship. It is important to highlight that IGOT-ULisboa is aligned with the University of Lisbon in the implementation of this process.

For IGOT-ULisboa, the HR Excellence in Research Award is therefore a core part of its institutional research strategy and the overall framework for its human resources policies and practices concerning researchers. Across the Institute, the principles of the European Charter for Researchers and of OTM-R are gradually being incorporated into institutional policies, regulations, procedures and support mechanisms. This commitment is expressed most clearly in the new OTM-R Policy published by IGOT-ULisboa.

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

Detailed description and justification (max. 500 words)

IGOT-ULisboa has designed its Action Plan so that implementation rests on existing institutional structures, clear ownership and continuous support. Every one of the 21 actions has a designated Responsible Unit drawn from the units that already hold competence over the relevant area: the Ethics Commission, the Equality Commission, the Scientific Commission, the Human Resources Unit, the Executive Director, the Director of the Centre of Geographical Studies (CEG), the IGOT AI Working Group and the Coordination of the 3rd Cycle of Studies. Assigning actions to these bodies ensures that each measure is integrated into their regular activity plans, decision-making processes and quality assessment systems, and that responsibility for delivery is shared across the Institute.

The Implementation Committee will provide continuous support to the Responsible Units. It will help them translate each action into concrete steps, clarify the requirements of the European Charter for Researchers and the OTM-R principles, and check that the outputs produced (guidelines, templates, regulations, training programmes) meet the defined targets.

The actions are anchored in commitments and resources the Institute has already made. Several build directly on ongoing initiatives: the reinforcement of the Ethics Commission (Action 1), the Gender Equality Plan 2025-2030 (Actions 5 and 12), the acquisition of a digital project management platform (Action 7), the investment in research infrastructure and the GeoFutures Lab for 2025-2029 (Actions 3 and 14), and the University-wide work on AI guidelines and on a new researcher assessment regulation (Actions 2 and 8). This reduces the risk that actions remain on paper for lack of funding or institutional will.

Implementation has the backing of the Institute's leadership. The Steering Committee includes the President of IGOT-ULisboa, the Executive Director and the Director of the CEG, who together hold the authority to allocate resources, approve regulations and resolve obstacles. Twice a year, the Steering Committee will review progress, identify delays or risks and adopt corrective or mitigation measures, including reassigning tasks, adjusting timelines or reinforcing resources where necessary.

The actions are sequenced realistically. Quick, low-cost measures such as new templates, guidelines and regular consultations are scheduled for 2027 and 2028, while structural measures requiring investment or legal adaptation, such as the integrated data infrastructure and structured teaching opportunities for PhD grantees, extend to 2029-2031.

Finally, implementation is reinforced by external alignment and public accountability. IGOT-ULisboa will continue to work with the University of Lisbon Consulting Committee, ensuring coherence with University-wide processes and drawing on the experience of other Schools. Progress will be published on the dedicated HR Excellence in Research page of the institutional website and presented to the research community in the annual consultations foreseen in Action 16.

How will you monitor progress (timeline)?*

Detailed description and justification (max. 500 words)

Progress will be monitored through a multi-level cycle that includes trimestral monitoring by the Implementation Committee and semestral review by the Steering Committee, culminating in the interim assessment in 2029.

At the operational level, the Implementation Committee will meet each trimester. Before each meeting, Responsible Units will report on the status of their actions against the timeline and targets in the Action Plan, using a simple common template that records completed steps, values for each indicator, upcoming milestones and any obstacles. The Implementation Committee will consolidate this information into a monitoring table covering all 21 actions and classify each one as completed, on track, delayed or at risk. These results will be summarised in short progress reports delivered to the Steering Committee.

At the strategic level, the Steering Committee will meet twice a year to review these reports, discuss delayed or at-risk actions and decide on corrective measures. Its decisions will be recorded in minutes and fed back to Responsible Units through the Implementation Committee. In parallel, IGOT-ULisboa will report on its progress to the University of Lisbon Consulting Committee, which also meets twice a year, ensuring alignment with University-wide actions.

The monitoring calendar follows the milestones of the Action Plan, identifying the quarters in which Actions will have achieved their targets:

2027: Actions focused on regulation, guidelines and participation.

- **Q2:**
  - Action 1. Streamlining of the Ethics Approval process.
  - Action 8. New regulation for the performance assessment of researchers.
  - Action 16. Regular consultations and participation in governance.
- **Q4:**
  - Action 2. Guidelines on the ethical use of artificial intelligence.
  - Action 6. Strengthened Participation Channel.
  - Action 11. New guidelines for minutes of scientific scholarship selection procedures.

2028: Actions consolidating procedures and support structures.

- **Q2:**
  - Action 9. Guidelines for the assessment of research project scholarship recipients.
  - Action 10. Renewed templates for job advertisements.

- Action 13. Guide for good practices in fieldwork risk assessment.
- Action 14. Procedures for equipment access.

- **Q4:**
  - Action 7. Digital management platform for project applications and administration.
  - Action 15. Onboarding package and welcome tour for new researchers.
  - Action 17. Individual career development plans and systematic career counselling.
  - Action 18. Training on entrepreneurship and intersectoral careers.

2029: Consolidating support structures and training.

- **Q4:**
  - Action 3. Integrated data infrastructure and information manager.
  - Action 19. Structured teaching opportunities for PhD scholarship grantees.
  - Action 21. Digital platform for the submission of job applications.

2030: Strengthening equality and work-life balance.

- **Q4:**
  - Action 5. Implementation of the 2025–2030 Gender Equality Plan.
  - Action 12. Work–life balance and research time management.

2031: Refining outreach and supervision.

- **Q4:**
  - Action 4. Open access, citizen science and outreach strategy.
  - Action 20. Training and guidelines for supervision and mentoring.

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

Detailed description and justification (max. 500 words)

Each of the 21 actions in IGOT-ULisboa's Action Plan is linked to specific, measurable indicators and time-bound targets defined so that progress can be verified objectively at the interim assessment in 2029 and at the subsequent renewal. The indicators fall into three complementary types.

1. Milestone indicators measure whether a policy instrument, procedure or structure has been created and adopted. Examples include the AI guidelines for research and education (2027); the new regulation for researcher performance assessment (2027); the new templates for job advertisements and scholarship selection minutes (2027); the career development plan model (2027); the guidelines for scholarship assessment, fieldwork risk assessment, equipment access and supervision and mentoring (2028); the onboarding package (2028); the digital project management platform and the hiring of a data manager (2028); the digital platform for the submission of job applications (2029), and the integrated data infrastructure (2029).

2. Activity indicators measure the regular provision of training, awareness and participation opportunities. They include the number of ethics training sessions (at least two per year), Equality Commission events (at least two per year, one for PhD students), and sessions on open access and citizen science, project management, time management, entrepreneurship and supervision (at least one per year each). They also include annual meetings with R1 researchers and community-wide consultations (at least one per year each).

3. Outcome and coverage indicators measure whether the new instruments actually reach researchers and change practice. These include the share of Ethics Approval applications receiving a first response within one month (at least 80% in 2027 and 90% from 2028), and full compliance from 2027-2028 for job advertisements, scholarship assessment processes, structured feedback to scholarship candidates, equipment requests and onboarding of new researchers. Other targets are 100% of R1 and R2 researchers with an active career development plan and 50% involved in the mentoring scheme by 2028. Several targets are set specifically for the interim assessment: at least 25% of research staff trained in open access and citizen science, at least 20% of PhD grantees involved in structured teaching, and at least 33% of senior researchers trained in supervision and mentoring by 2029.

Responsible Units will collect data from existing records, and deliver them to the Implementation Committee for integration in the progress reports. Quantitative indicators will be complemented by qualitative evidence from the annual consultations foreseen in Action 16. This evidence will make it possible to check whether the main perceptions recorded in the consultation process during the Gap Analysis have improved.

For the interim assessment, the Implementation Committee will prepare a full report comparing values achieved with 2029 targets. The Steering Committee will use it to judge which actions are complete, which need reinforcement, and whether new actions or revised targets are required in the updated Action Plan.

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