

Report of the External Advisory Committee, Instituto de Estudos Medievais (IEM), Universidade Nova de Lisboa (Portugal) - 2024

Meeting

The virtual meeting of the advisory committee took place on 3 April 2024.

Committee members participants

Prof. Thomas Barton, University of San Diego

Prof. Manuel A. Castiñeiras González, Universitat Autònoma de Barcelona

Prof. Laura Fernández Fernández, Universidad Complutense de Madrid

Prof. Olivier Poncet, École nationale des chartes-EHĒSS

Prof. Juan Antonio Quirós Castillo, Universidad del País Vasco

Prof. José Carlos Ribeiro Miranda, Universidade do Porto

Prof. Pere Verdés Pijuan, Consejo Superior de Investigaciones Científicas

Background

Since external advisory committee's report we can state that the IEM has continued to work to strengthen its position as a research centre in medieval studies with recognised prestige, both nationally and internationally recognized hub of research on medieval studies with an impressively active program of interdisciplinary research (in Archaeology, Art History, History, etc.) and a deep commitment to the dissemination of scholarly knowledge among the broader public, including engagement in public history, public archaeology, and cultural heritage programs across Portugal. The previous directors have helped to guide the institution to a position of great intellectual prominence and strength.

Between 2019 and 2023, the IEM has experienced considerable growth, especially in its number of collaborators and PhD students. In particular, in recent years, it has achieved notable increases in its number of affiliates involved in various projects and fellowships. At the same time, it has increased the extent of its financial support from competitive grants and research productivity through publications and other modes of dissemination.

The IEM remains organized around two research groups (RGs), "Territories and Powers: A Global Perspective" and "Images, Texts, and Representations," both of which are led by contracted post-doctoral researchers. The Institute

continues to be governed by an executive council, a scientific committee for strategic planning, a general assembly, and our external advisory committee.

This report is divided into three sections: Strengths, Challenges and Areas of Improvement, and Areas for Reflection.

1. Strengths

- The ambition evidenced by opting to undergo a regular review every year by an external committee tasked to evaluate not only areas for improvement but also weaknesses and areas for reflection. Along these same lines, we should underscore the creation of a protocol of auto-evaluation of the units of the IEM, which helps determine their minimum research productivity.
- The IEM has experienced growth despite the complexities of the post-pandemic period. This development has focused on hiring personnel and supporting young researchers rather than investing in infrastructure and other material expenses.
- Success in using its resources (in particular, grant opportunities) to attract a wide array of foreign researchers: e.g., it currently has personnel from France, Italy, and Spain.
- Researchers undertaking a wide range of new projects in archaeology, literature, art history, and history on local, national, and European topics. We should also highlight the significant increase in IEM projects and operations funded by the Fundação Para a Ciência e a Tecnologia (FCT).
- Heightened involvement in national and international networks: e.g., CARMEN, FIDEM, Ruralia, IN_SCIT, Ménestrel, etc. The IEM also benefits from stable relationships with various Portuguese and foreign universities, such as the Universidade Aberta, Universidade de Évora, Oxford University, Université de Poitiers, Universidad de Santiago de Compostela, Universitat de Girona, the CSIC, the Casa de Velázquez, the École Nationale des Chartes and the CNR-ISEM.
- Success in collaborating with an array of organizations to disseminate knowledge amongst the broader public, including foundations, cultural associations, archives, museums, and local Portuguese communities. The Institute has, in particular, succeeded in forging relationships with various local town councils, such as that of Castelo de Vide. Castelo de Vide's council and the IEM collaborate to organize an annual autumn doctoral school as well as a conference with published proceedings. The

Institute has also organized numerous workshops and open courses and provided support for tourist-guide training and teacher education.

- Strong commitment to publishing books in Open Access, in line with the policies of the European Union.
- High productivity and activity. In 2023, the IEM hosted three major conferences and twelve seminars and published twelve books. In addition, participation in international conferences, such as IMC Leeds and EAA Belfast, is a relevant achievement.
- In 2023, the IEM implemented a new communication strategy, launching a newsletter and new dissemination platforms. The website (<https://iem.fcsh.unl.pt>)—a key instrument for diffusing research, and news—has been redesigned in the last year. Now it is more useful to search for information about the IEM, its activities, the research projects, the publications and resources produced. The creation of a medieval “brand” is also an important achievement of 2023.

Challenges and Strategic Areas of Improvement

- A significant challenge facing the IEM that should influence its strategic planning entails developing new administrative structures in response to its vibrant activity. Despite the IEM’s expansion of its resources, personnel, and activities over the past several years, its administration has remained static or has experienced only temporary staffing increases and is consequently arguably now too small to permit the IEM to handle its current situation or to confront future challenges adequately. Creating and coordinating innovative, synergetic units within an institute of this size requires a larger and more sophisticated managerial structure.
- Along those lines, the functions of the two RGs may need further internal reflection. It is currently unclear if the purpose of each RG is managerial or intellectual. We also observe clear asymmetries in the size and composition of the RGs and wonder if these disparities have implications for their respective research agendas. Perhaps it would make sense to have a larger number of better-integrated RGs. It might be necessary to define more precise lines of research that structure the activities of the Institute according to scientific and administrative terms by associating them with the RGs or the IEM’s primary investigatory axes. These lines of research need to be regularly

reviewed and updated to drive innovation and promote synergy among the different component research initiatives and other activities of the IEM.

- The IEM journal *Medievalista* is extremely important for furthering the Institute's objectives, in particular, and medieval studies in Portugal, in general. The first issue appeared in 2005 and its editors have regularly produced two issues a year since 2008. It continues to be the only Portuguese journal dedicated entirely to medieval studies and notably adheres to a rigorous double-blind peer review process. It offers, as an essential regular feature, detailed presentations of completed doctoral theses relevant to the study of medieval Portugal. Despite these accomplishments, the commission nevertheless feels that the journal is urgently in need of a redefinition along two main lines: a) the inclusion in international databases such as Scopus (Elsevier) and the Web of Science (Clarivate) so that it can be involved in the ranks such as the Scimago Journal & Country Rank; b) the alignment of the monographic issues and general contents of the journal with the Institute's strategic goals. During 2023, some changes have been made, incorporating new international editorial team members. However, we consider a priority goal for the IEM to promote the journal in the following years.
- Another challenge/opportunity for the IEM is the possibility of obtaining European projects. As mentioned, the ERC-funded VINCULUM project (Consolidator Grant 819734) led by Maria de Lurdes Rosa (www.vinculum.fcsh.unl.pt) is a foundational achievement and has commenced of a "virtuous cycle" that has helped promote the IEM's growth and excellence. The IEM should build on this momentum by making a commitment to obtaining additional major grants, not just highly competitive ERC projects (Starting, Consolidator, Advanced, or Synergy) but also other programs such as COST Action and MSCA Action (Doctoral Networks, Postdoctoral Fellowships, Staff Exchanges). IEM members already have experience with some of these programs, which offer funding opportunities that are easier to obtain than ERC projects. We encourage the creation of new schemes for exploratory projects aimed at producing competitive proposals in 2024.
- The committee encourages the IEM to increase its social-media presence—in particular, via Instagram, Facebook and Twitter—and recommends the creation of a regular blog and a YouTube channel.

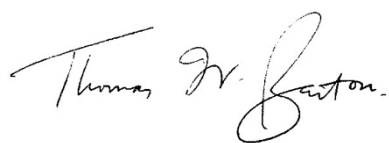
2. Areas for further reflection

- As we have already pointed out, it is necessary to reflect on what strategic lines of research the IEM should promote to help further reinforce its European reputation. Apart from the existing three research axes (promoting research, sharing knowledge, and supporting researchers), the IEM can and should define and promote new lines of research that will add to the development of the field of medieval studies.
- There are clear imbalances in the members' productivity and level of participation in the IEM's regular activity. These asymmetries could be tackled by creating a research strategic plan involving all the members.
- With these goals in mind, Digital Humanities should have a higher profile at the IEM and should be more clearly reflected in its Sustainable Development Goals and 2030 Agenda. Perhaps the "Inclusive Societies" objective should pay more attention to the social reality and culture of minorities (such as Jews, Muslims, and other groups). This is one of the most important lines of research to be pursued by an institution dedicated to medieval studies.
- Although the IEM already has a high level of internationalization, it should nevertheless reflect further on its positioning within European academia and promote further participation in events abroad and collaboration in projects with non-Portuguese universities. Being part of international collaborative networks is essential to improving the IEM's global reach and reputation.
- It is necessary to develop a more selected publication policy that is more clearly aligned with the IEM's strategic lines of research, which would, in turn, recommend a more limited number of series/collections. The implementation of these series/collections needs to be undergirded by the creation of corresponding editorial structures and protocols that will ensure that they are of sufficiently high quality to obtain recognition (especially from certifying organizations).
- Moreover, it would be advisable to publicize the IEM's publications by announcing them to international scholars and research centres and by sending copies of new books to relevant international journals.
- The exchange of IEM publications with those of other organizations could further broaden the Institute's distribution and increase its access to new bibliographic resources.

- The IEM has an important network of collaborations and contacts that support its role as a space for visiting international researchers. Fostering these relationships is important for continuing the growth of the IEM's brand and international academic reputation. Increasing the availability of visiting fellowships would also help facilitate this development.

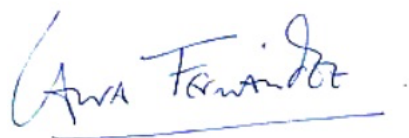
Conclusion

We reaffirm what we noted in the previous report: the EMI has acquired a prestigious position on the international academic panorama and continues to work to improve its management structures and resources as well as to develop in the best possible way its role as an institution with a responsibility for training and edification. The strategic plan for 2024-30 will be an opportunity to take the IEM to a new level of prominence.

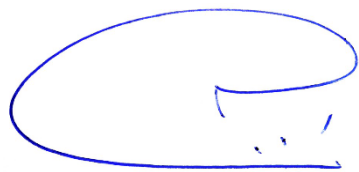


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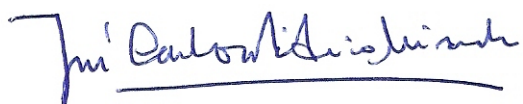
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