

# Fundação para a Ciência e a Tecnologia

## Evaluation Research Unit 2023/2024

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

### 01. IDENTIFICATION OF THE R&D Unit

1.0 ID number

749

1.1 R&D Unit name

Institute of Medieval Studies

1.2 R&D Unit acronym

IEM

1.3 R&D Coordinator

Catarina Maria Santos Guerra Tente

1.4 Main scientific areas of activity

Humanities and Arts - History and archaeology

Humanities and Arts - Arts (art history, dramatics, music)

Humanities and Arts - Linguistics and literary

Social Sciences - Other social sciences

1.5 Keywords

Middle Ages

Medieval Studies  
Heritage and Sustainability  
Materialities and Representations  
Communities, Identities and Memory  
Knowledge transfer and civil society partnership

#### 1.6 R&D Unit address and contacts

- Postal Address:  
Av. Berna 26 C  
1069 - 061 Lisbon
- Telephone Number:217908300
- E-mail address:iem.geral@fcsh.unl.pt

#### 1.7 R&D Unit home page URL

<https://iem.fcsh.unl.pt/>

## **02. Evaluation Panel to which the R&D Unit submits the application**

#### 2.1 Evaluation Panel to which the R&D Unit submits the application

ARTS AND HUMANITIES - History and Archaeology

#### 2.2 Multidisciplinary evaluation

No

#### 2.3 Location for the Evaluation Panel visit to the R&D Unit

- IEM, Colégio Almada Negreiros, Campus de Campolide  
1099 - 032 Lisboa

## **03. Laboratory Intensity**

#### 3.1 Laboratory intensity

## Laboratory intensity

## Intensity description

Medium [f=1,1]

R&D unit with archives, libraries or platforms for public use, database infrastructures of national and European value and other equipment and laboratories not falling within the previous "high" definition.

The choice of medium laboratory intensity reflects IEM's current reality. For a long time, but increasingly in recent years, IEM has been the RU that invests in research practices based, on the one hand, on open-access research resources and tools (databases and digital libraries) and, on the other, on making its results publicly available on a regular basis. Some of the interdisciplinary research projects hosted by IEM have, however, required frequent trips to the field and development of fieldwork campaigns involving multidisciplinary teams, as well as regular use of the important laboratory resources made available by associated institutions or externally contracted. Given the increasingly technical nature of certain areas of research (art history, archaeology or heritage), it is likely that IEM will invest in specialised instruments to reduce costs and thus increase its laboratory intensity in the coming years.

Free access to research results has been a mission of the IEM since its foundation. Indeed, since 2005, it has been responsible for publishing the first online journal in Portugal, "Medievalista", and has promoted the recent organisation of a "Digital Library", which provides sources and inventories of documentation that were previously more difficult to access, as well as all the publications promoted or supported by the IEM. Thanks to the latest Strategic Project (SP), it has helped to strengthen the Library's resources (5,000 volumes with a high degree of specialisation), in addition to free access to international bibliographic databases, which are essential for all areas of research. The investment made in the new RU website is a privileged gateway to using these resources. Making resources available in open access proved to be a fundamental strategy, and the number of accesses exceeded expectations. These resources have given researchers access to crucial information during the pandemic.

IEM also participates in and benefits from the resources shared by NOVA FCSH, such as the output and data dissemination platform ROSSIO, which promotes greater visibility and impact of the materials and products resulting from the research carried out at the Institute.

As part of the open science policy, it will be important in the coming years to strengthen IT resources to ensure their modernisation, but also to increase the capacity and operability of more research data in different and varied formats (textual, audiovisual, geospatial and 3D). It is important not only to inventory, store and make available this data, but also to increase the capacity for processing large amounts of information resulting from research in the

areas of digitisation and 3D modelling of landscapes, objects and buildings. Alongside research, these resources have been leveraged as heritage visualisation tools, which are fundamental to boosting the "Medieval"; project, the Institute's brand for knowledge transfer and societal impact which, having been created under the current PS, is in a growth phase.

The demands of field and laboratory work have also increased and are expected to increase during the next SP. Despite the use of outsourcing that we have been monitoring, there is equipment that needs to be acquired, namely equipment related to micro and macroscopic analyses of various materials (organic and inorganic). The possibility of providing IEM with a physical space and specialised instruments for use by its researchers is being studied, in response to the expected increase in laboratory intensity.

## 04. Involved institutions

#### 4.1 Main Management Institution

Universidade Nova de Lisboa (UNL)

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

#### 4.3 Partnership agreements with other Management Institution(s)

#### 4.4 Participating Institution(s)

#### 4.5 Partnership agreements with Participant Institution(s)

[Câmara Municipal de Lisboa \(CML\)](#)

[Instituto Politécnico de Leiria \(IPLeiria\)](#)

[Universidade Aberta \(Uab\)](#)

[Universidade do Algarve \(UAlg\)](#)

[Universidade dos Açores \(UAçores\)](#)

[Escola Secundária Jorge Peixinho \(ESJP\)](#)

[Agrupamento de Escolas das Laranjeiras \(AEL\)](#)

[Agência Nacional para a Qualificação e o Ensino Profissional, I.P. \(ANQEP, I.P.\)](#)

[MUDE - Museu do Design e da Moda - Câmara Municipal de Lisboa \(MUDE\)](#)

[Terceira Igreja Evangélica Baptista de Lisboa \(TIBL\)](#)

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

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

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

The hallmark of the IEM, founded in 2002, is its dedication to research in Medieval Studies and the quality of its researchers from various scientific fields. As the only RU in Portugal exclusively dedicated to the Middle Ages, much of the knowledge it produces results from multi/inter/transdisciplinary approaches. Over 20 years of working together have enabled effective realisation of this methodological vocation,

boosted by the inclusion of researchers from multiple scientific areas and geographical backgrounds. Whilst the range of disciplines represented in the RU has varied over time - History, Archaeology, Art History, Literature, Archivist, Heraldry and Heritage, the RU's openness and cooperation with the broader Portuguese and foreign scientific community has led to collaborative research with other disciplines, such as Historical Musicology, Linguistics, Chemistry, Bioanthropology, Zooarchaeology, Paleogenetic and Mathematical Modelling. The consistent presence of the RU and its researchers in the international scientific panorama, as well as the attraction the IEM holds for foreign researchers, are factors prominent throughout this report.

The strategic project devised between 2018-23 was characterised by the continuity and consolidation of the strategic objectives outlined in 2013. IEM's project centred on Research, Training, and Dissemination.

The programme objectives acted as fundamental cornerstones, with the focused aim of establishing IEM as a centre of excellence, combining the following lines of action: (i) Quality Research - collaborative, innovative, interdisciplinary, inclusive and with an international dimension; (ii) an Open Access Policy for research data; (iii) and Building Bridges with Civil Society, boosting the impact of research [see 5.4].

The scientific objectives defined, aligned with the core themes of local and global, mobility and historical and cultural heritage, focused on: the study of Portugal in the Iberian, European and global contexts by addressing the circulation of people, ideas, practices and objects; the investment in collaborative work between the fields of the Social Sciences and Humanities, while also engaging in dialogue with the Natural Sciences; and collaboration with cultural and heritage institutions, in order to contribute to a more informed society. In this sense, the RU hopes to continue contributing to political decision-making in the fields of the management and safeguarding of heritage, and the economic and social value of medieval heritage and history.

In 4 words, the proposal for 2018-23 was characterised by Continuity, Consolidation, Growth and Innovation. The RU has intensively promoted scientific activities in the field of Medieval Studies, particularly through computerised and networked means, as well as stimulating and supporting new and diverse publications. It has supported its members' research by providing support and training for new applications for national and international funding and has promoted the internationalisation of its scientific production through research networks, collaborative and international research, and publications abroad. Its research has also been disseminated in open access by increasing the availability of research resources, as well as by organising various courses for non-academic audiences, including MOOC.

The Institute's actions were not affected by the measures imposed by the Pandemic. One month after the Pandemic was declared, IEM was able to convert international conferences to online events. Weekly online meetings were organised to ensure the cohesion of IEM members and boost joint reflection and the exchange of ideas. Although research in archives, libraries, fieldwork, and laboratories has been limited, the RU has used the crisis to strengthen links between its researchers. It also made possible a more active engagement of the researchers in RU's activities.

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

Our intention is not to praise individual research efforts in isolation, but rather to underscore the significance of coherence in collaborative, innovative, and educational interdisciplinary work that has already been undertaken, with tangible impact. The 5 contributions identified exemplify the programme objectives of the 2018-2023 strategic plan - Research Excellence, Open Access Policy and Connection with Society. Although each of the outputs falls preferentially into Research, Training or Dissemination, these areas of activity at RU are not hermetically sealed but work in an integrated way. In this regard, we present the five main contributions structured in Research, Training and Outreach:

## 1. Multi/Trans/interdisciplinary Research

One of the main features of the IEM is its capacity for uniting researchers from different scientific fields and developing truly interdisciplinary projects, involving areas as diverse as Art History, History, Archaeology, Geography, Chemistry, Geology, Bioanthropology, Anthropology, Carpology, Zooarchaeology, Paleogenetics and Ethnography. These methodological decisions have enabled the construction of detailed portraits of the past substantially deepening our understanding of ways of life among diverse medieval communities.

During the period under evaluation, IEM hosted 20 research projects funded by various organizations. All were multi and transdisciplinary projects, demonstrating the aptitude for building bridges with other RU both in FCSH and external to the University. We highlight the national projects hosted by IEM between 2018-23, because they reflect the high success of the RU in competitive national calls. IEM was the leading RU in 5 projects financed by FCT: Cistercian Horizons - Studying and characterizing a medieval Scriptorium and its production [<http://cistercianhorizons.fcs.unl.pt/>]; STEMMA - From singing to writing: survey on material production and routes of Galician-Portuguese lyric [<https://stemma.fcs.unl.pt/en/home/>]; Books, Rituals, and Space in a Cistercian nunnery (Lorvão); FALCO- Hypothesizing Human-Animal Relations in Medieval Portugal [<https://nemus.fcs.unl.pt/falco/>]; and FRONTOWN - Think big on small Frontier towns) [<https://frontowns.fcs.unl.pt/#>]. Another 3 as a participant RU with funding: IGAEDIS - The historical village of Idanha-a-Velha [<https://igaedis.uc.pt/en/home-2/>]; MEDCFRAFT - Crafts regulation in Portugal in the Late Middle Ages: 14th-15th centuries [<https://medcrafts2021.wixsite.com/medcrafts>]; IFORAL - Portuguese Municipal charters in the Middle Ages: an historical and linguistic approach in the digital era [<https://iforal.hypotheses.org/>]. The projects mentioned above are examples of the innovative and continuous ways in which IEM has developed effective interdisciplinary research. It has actively collaborated with RU including: LAQV-REQUIMTE - NOVA FCSH, HERCULES- UÉ, CESEM-NOVA FCSH, INESC-TEC, CEIS20-UC, CIAS-UC, Lab2PT-UM, CH-UL, LARC-DGPC.

## 2. Training

The advanced training programme developed by IEM as part of the 2018-2023 strategic project is vast and diverse (see 5.4). Training for various audiences and the dissemination of knowledge are the most visible aspects of IEM's partnerships with Heritage Sites, Archives, Libraries, Museums, Municipalities and Training Centers.

We highlight an initiative combining scientific excellence, internationalization, and a partnership with a small rural municipality. Every autumn for the last 8 years, Castelo de Vide has held an Autumn School for MA and PhD students, in coordination with the International Conference on the Middle Ages, which are part of the Medieval Studies Week that takes place there. It is aimed at postgraduate students from Portuguese and foreign universities, and scholarships are awarded to facilitate participation. The aim is to create a space for debate and exchange of experiences in which students can develop their knowledge and skills in the presence of renowned specialists from prestigious universities, promoting an interdisciplinary approach to the chosen topic. The Autumn School model is structured around theoretical sessions followed by debate and research workshops, which are eminently practical in nature. There is also a poster presentation and discussion session on the participants' research topics and study visits ([http://escola-medieval.castelodevide.pt/en\\_US/](http://escola-medieval.castelodevide.pt/en_US/)) .

## 3. Scientific Outputs and Open Access

Since 2007, IEM also publishes a collection of books divided into three series: "Estudos", "Documentos" and "Instrumentos de Trabalho". All of them available in open access. These collections aim to disseminate the research carried out inside and outside IEM. Choosing to publish specific materials in Portuguese serves as a gesture of returning the investment made in IEM's initiatives to society. The RU is deeply committed to editorial policy and peer review mechanisms, publishing works within its disciplinary scope while avoiding self-publication. Instead, it leverages the collaboration of external and international researchers. In addition to establishing the IEM's editorial brand as synonymous with innovative and excellent scholarship, the institute is dedicated to achieving impact through the publication of e-books.

Further and importantly, The Medievalista, IEM's biannual peer-reviewed digital journal, offers all national and foreign researchers the possibility of publishing texts in Open Access (<https://medievalista.iem.fcsh.unl.pt/index.php/medievalista/about>). Founded in 2005, it is the first on-line Portuguese scientific journal dedicated to Medieval Studies, having published 35 volumes to date. Its aim is to publicize Portuguese research, but also to disseminate international studies, thus contributing to a comparative view of the Middle Ages [145 3000 accesses, an average of 24,000 per year].

#### 4. Specialized Training for various audiences and Dissemination

Training for various audiences and the dissemination of knowledge are the most visible aspects of IEM's partnerships with Heritage Sites, Archives, Libraries, Museums, Municipalities and Training Centres. In the last 5 years IEM has offered the following free courses in partnership with the World Heritage Monument, Monastery of Batalha (BM) aimed at the general public and secondary school teachers. Four editions, with a total of around 500 participants were entitled: "In the Time of King João I" (2019); "Illustrious generation: politic, culture and myth (2020); "In the Time of King Dinis" (online, 2021); "The warrior monarchy: From County to Kingdom" (2022). Notably, these courses led to the development of a bilingual Portuguese/English editorial collection entitled "Scriptorium of Batalha Monastery", comprising books providing teachers and tourist guides with tools to enhance their knowledge. One has already been published (<http://mosteirobatalha.gov.pt/pt/index.php?s=noticias-icia=350>) and two volumes are due out in 2024. In addition, we ran specialized courses for tour guides and interpreters, in collaboration with the BM and Portuguese Association of Tourist Guides and Tour Managers (AGIC). The courses sold out on the first day of enrollment, with 70 trainees in each edition and waiting lists of almost 100 tour guides.

#### 5. Outreach / Knowledge Transfer

The choice of Historical Cultural Heritage as one of the key words in the 2018-2023 strategic project stems from the IEM's longstanding tradition of establishing partnerships with Heritage Sites, civil entities and cultural institutions, which has always produced dissemination and knowledge transfer products, as outlined in the previous point. These collaborations are very diverse and, in addition to traditional training and consultancy initiatives, consist of events such as exhibitions, concerts and film cycles. By way of example, we would highlight the "Film Cycle: Light and Shadow - Representations of the Middle Ages in Cinema", held during December 2022 in Lisbon (a total of 21 films), because of a partnership with the Cinemateca de Lisboa (<https://iem.fcsh.unl.pt/en/news/2022/film-series-luz-e-sombra-representacoes-da-idade-media-no-cinema/>). The second edition of this cycle took place in Madrid as part of a wider project in collaboration with the Spanish Cinematheque, the Círculo de Bellas Artes and the Universidad Autónoma de Madrid (<https://iem.fcsh.unl.pt/en/event/2nd-edition-film-festival-luz-e-sombra-representacoes-da-idade-media-no-cinema/>). The previous strategic project envisaged the creation of a spin-off dedicated to cultural and educational intervention. The creation of a company did not come together, but IEM did create a specific brand for the transfer of knowledge generated at IEM to diversified audiences, with the mission of creating economic and social value from this knowledge. The Medieval brand ([www.medieval.fcsh.unl.pt](http://www.medieval.fcsh.unl.pt)) thus aims to create

innovative products and solutions to promote the Middle Ages in today's society and was awarded the prize of NOVA Scienncepreneur 2023 recognising its groundbreaking character and the capacity for value creation and societal impact.

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

#### Reference

#### URL

- Andrade, Amélia Aguiar; Tente, Catarina; Silva, Gonçalo Miguel Correia Melo da et al. / Inclusão e Exclusão na Europa Urbana Medieval. Lisboa: IEM - Instituto de Estudos Medievais / Câmara Municipal de Castelo de Vide, 2019. 552 p. (Coleção Estudos:19). <http://hdl.handle.net/10362/85066>
- Tente, Catarina; Theune, Claudia. / Household goods in the European Medieval and Early Modern countryside. Leiden: Sidestone Press, 2023. 276 p. <https://doi.org/10.59641/cd27f3b4>
- Seixas, Miguel Metelo de; Krass, Urte et al. / Heraldry in Contact - Perspectives and Challenges of a Connective Image Form. Ostfildern: Thorbecke, 2023. 216 p. <http://hdl.handle.net/10362/164363>
- Barreira, Catarina Fernandes. / Manuscritos de Alcobaça: Cultura, identidade e diversidade na unanimidade cisterciense. Lisboa: IEM /DGPC Mosteiro de Alcobaça, 2022. 549 p. <http://hdl.handle.net/10362/145239>
- Branco, Maria João; Fontes, João Luís. / Global Turns, Local Circles. People, ideas and models in flux in Medieval Europe. 1ªed. Lisboa: Instituto de Estudos Medievais (IEM) , 2022. 243 p. (Coleção Estudos: 28). <http://hdl.handle.net/10362/146044>
- Andrade, Amélia Aguiar; Fontes, João Luís ; Roldão, Filipa et al. / DOMINUS REX - As Inquirições Medievais dos Reis de Portugal : Catálogo da Mostra Documental. Lisboa: Instituto de Estudos Medievais/ Centro de História da Universidade de Lisboa, 2020. 52 p. <http://hdl.handle.net/10362/107600>
- Tibúrcio, Catarina; Valadas, Sara; Cardoso, Ana; Candeias, António; Barreira, Catarina Fernandes; Miguel, Catarina. / On the use of EDXRF, mapping-EDXRF and UV-Vis FORS to unveil the step-by-step production of two illuminated manuscripts from the fifteenth century Portuguese Royal Court. In: Microchemical Journal. 2020; Vol. 153. pp. 1-9. <https://doi.org/10.1016/j.microc.2019.104455>
- Costa, Adelaide Millán da. / Ciudades y villas en el reino de Portugal en la baja Edad Media : Los factores político y jurisdiccional como criterios de jerarquización. In: Anuario de Estudios Medievales. 2018 ; Vol. 48, Nº 1. pp. 25-47. <http://hdl.handle.net/10362/61343>
- Prata, Sara; Cuesta-Gómez, Fabian. / Oil and wine in early medieval rural settlements from castelo de vide (Alentejo, portugal): Dating, context, and scale of production. In: Archeologia Medievale, 2020, 47, pp. 183-198. <http://hdl.handle.net/10362/134069>
- Seabra, Luís; Tente, Catarina; Vaz, Filipe Costa et al. / Crops on the Rocks: Production, Processing, and Storage at the Early Medieval Site of Senhora Do Barrocal (Municipality of Sátão, Central Portugal). In: Plants. 2022; Vol. 11, Nº. 4. pp. 1-26. <http://hdl.handle.net/10362/135529>
- Rêpas, Luís Miguel; Barreira, Catarina Fernandes. / La cultura escrita en los monasterios femeninos del Císter en Portugal (siglos XIII-XV): balance y perspectivas. In: Lusitania Sacra. 2022; 45. pp. 33-51. <http://hdl.handle.net/10362/143701>

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## URL

- De Luca, Elsa; Loic, Erika; Cavero, Alicia Miguélez. / Intermediality in medieval Iberian manuscript cultures: methodological reflections on ongoing and future research. In: Journal of Medieval Iberian Studies. 2022; Vol. 14, Nº 1. pp. 1-14. <https://doi.org/10.1080/17546559.2021.2021588>
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- Lopes, Paulo Esmeraldo Catarino. / Medieval Travels and the Ensuing Texts as Mirrors of a Society, a Culture, and a World View. In: Voyages and Travel Accounts in Historiography and Literature: Voyages and Travelogues from Antiquity to the Late Middle Ages. editor / Boris Stojkovski. Vol. 1 Novi Sad / Budapest: Trivent Publishing, 2020. pp. 55-111. <http://hdl.handle.net/10362/109867>

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

As mentioned in point 5.1, the 2018-23 SP was organised around programmatic, operational, and scientific objectives. These, articulated in 14 operational objectives, were realised in various initiatives. The deviations from these initiatives can be found in 5.5.

### I. International Collaboration

The RU has planned several activities here [see 11.1 SP 2018-23], in which IEM has accomplished the following. In 2020, in the context of the Pandemic, a virtual round table organised by the IEM was held with directors of European and North American centres of Medieval Studies, as part of the 1st Leeds virtual congress. The organisation of a new meeting is pending. Concerning application for international funding IEM chose several projects: an ERC Consolidator Vinculum - Entailing Perpetuity (GA No 819734); participated institutionally in 3 COST Actions (Islamic Legacy; New Communities of Interpretation; Worlds of Related Coercions in Work); had a project financed by Volkswagen Fdn. (In the Service of the Crown); and also held 2 projects financed by Casa de Velázquez (ARCHIFAM - Family archives, and Small towns and territorial cohesion in southern Europe). Internationally RU researchers have participated in 24 projects funded by foreign agencies. The range of partner institutions includes several Spanish universities, as well as CSIC, and institutions from NL, UK, FR and the USA. Important also are international research networks, both formal/informal. Formal include: RURALIA, CARMEN, FIDEM, MENESTREL, In-Scit, NEMUS, and UNESCO Ocean's Cultural Heritage. Informal include: IUS ILLUMINATUM, Informal Cistercian Studies Network and VIATOR Network. In 2022 and 2023 the prizes awarded to MA and PhD theses and articles in the Medievalista Journal that were planned SP 2018-23 were implemented, under a specific regulation approved by the RU Scientific Committee.

### II- Other Sources of Research Funding

In addition to the international funding, the RU has obtained several research grants from a wide variety of sources. One project funded by

Calouste Gulbenkian Foundation (Annales Portucalenses Veteres); 3 projects funded by Portuguese municipalities (Viseu Heritage; Ethno-archaeology of the Caramulo Mountains; IGAEDIS I; Research, study and dissemination of the historical heritage of the São Jorge Castle / Alcáçova de Lisboa and its surroundings), and 1 project funded by La Caixa Foundation (Idanha - New links, new creative historical readings).

### III - Training

In the last 5 years, the IEM has seen 22 of its members graduate as MAs and 19 as PhDs. In this regard IEM participates in 3 degree programmes and 3 MAs and currently in 5 PhDs, with a PhD in Archaeology due to open in 2023. Two of the PhD programme result of a partnership between IEM and other RU. This are the case of CORES, between NOVA FCSH e NOVA FCT (<https://sites.fct.unl.pt/doutoramento-conservacao-restauro-patrimonio/home>), but also of DEM, which is a e-learning programme in partnership between NOVA FCSH, UAb and CSIC (<https://www.fcsch.unl.pt/en/courses/medieval-studies-e-learning/>). It is clear that IEM ensures to maintain and expand academic training at all levels to ensure constant and dynamic dialogue between teaching and cutting-edge research. The RU offers also optional seminars for integration into research projects and other optional curricular units, totaling 4-5/years, allowing students to become actively involved in research projects at the Institute. In addition, the RU has organised New Year courses, summer courses, various Open Classes.

IEM researchers have been invited to teach on doctoral programmes abroad (U. P. Gregoriana, É. Chartres, Sorbonne, Complutense and Autonomous Madrid, Hagen, IMF - CSIC) and on foreign summer courses. Also worth of mentioning are the doctoral workshops in partnership with Casa de Velázquez.

### IV - Dissemination and Open Science

The Open Science Policy was paramount in the research and dissemination activities led by IEM. In general, in the last 5 years the RU supported 92 books, including those published by IEM (in open access) and national and international volumes edited by IEM researchers. We also emphasise 208 papers published in international journals, 123 papers in national journals, and 423 book chapters published in Portugal and abroad.

Further, IEM has promoted a collection of sources in open access. The project Digital edition of Portuguese Medieval Documents, led by the Contracted Researcher for Medieval Sources, has until now resulted in 2 books - Municipal accountability book and chartulary. Work was also undertaken on Medieval Courts sources, producing the publication, in partnership with CEH, 6 vols. concerning selected documents of the Courts of Kings Afonso IV, Pedro, Fernando, Duarte, and Manuel I.

Regarding DB the following stand out: VINCULUM (<https://www.vinculum-database.fcsch.unl.pt/>) e STEMMA ([cantigas.fcsch.unl.pt](https://cantigas.fcsch.unl.pt/)), as well as the Fernão Lopes Portal, crated at Georgia University and transferred and updated at IEM in 2019 onward (<https://fernaolopes.fcsch.unl.pt/>). Finally, a series of 4 MOOC designed to deconstruct myths about the Middle Ages, entitled Crossed Views on the Middle Ages, will be made available to the public in 2024 at NAU platform.

More resources can be found on the IEM's website, in conjunction with the RU of the ROSSIO infrastructure (<https://rossio.pt/front/home>).

### V - Organization of conferences, colloquia and seminars

The RU has staged regular and occasional interdisciplinary scientific meetings. At this level, the achievements foreseen in the SP have been far exceeded. Whilst it is impossible to list them all, we highlight some of the regular events, in addition to those included in 5.2: Medieval Europe in Motion (2019-22, partnerships with DGPC- MB, Municipality of Lisbon and Lisbon Geography Society); Early Medieval Meetings - EMCAM; EMBIO and EMCITY (organised in Castelo de Vide, Coimbra and Idanha-a-Nova, with the support of the municipalities and CIAS-UC); Network colloquium - Small Cities in Time (2018, 2019, 2021 and 2023, organised in Castelo de Vide with local authority support and in partnership with the other History RU of NOVA FCSH); Architectures of the Soul (2020 and 2023 in partnership with DGPC - MB, CHAIA and CEHR); Researching the Middle Ages (annual, in partnership with CITCEM); Mattoso Seminar (2019/2021) and New Medieval Lisbon (6th edition 2022). In addition to these, we also highlight the Seminar on Medieval Studies (1 conference/month) and the IEM Conferences, with 3 conferences/year, both held regularly during SP 2018-23. Finally we underline the annual International Conference on the Middle Ages ([https://idade-media.castelodevide.pt/en\\_GB/](https://idade-media.castelodevide.pt/en_GB/)), which is now in its 9th ed, resulting from a partnership with the municipality of Castelo de Vide and aimed at discussing and disseminating the latest knowledge on the European medieval town, seen from a comparative and interdisciplinary perspective. The 5 eds. organized between 2018-23 have brought together 266 researchers from 19 countries. The meetings gave rise to the publication of 7 vols., the 8th of which is in preparation.

To provide research tools and also training on how to submit projects to various competitive calls to our researchers, in SP 2018-23, IEM organized several workshops: Applying for a CEEC; Applying for an FCT Doctoral Scholarship; Applying for FCT projects, How to submit MSCA applications, WordPress Course, Medieval Latin, Palaeography, and Digital Cartography and GIS.

## VI - Knowledge transfer and actions of special relevance to society

Knowledge transfer and actions of special relevance to society are 2 of the fields in which IEM has invested most in recent years. Aimed at a children's audience, the RU has participated at the national programme Scientifically Probable, delivering at secondary schools hands-on-approach workshops on illuminated manuscripts "When the monks made books", "One day in «scriptorium» of Alcobaça", attended by 150 students.

For the broader audience RU has run several courses: 1) one aiming municipal technicians called "On Middle Ages" (C. Vide, 2019); 2) for the general public entitled "New paths in Medieval Heritage", funding by PRR programme (2023); 3) several for Tourist Guides, in association with AGIC and BM, Alcobaça Monastery and Lorvão Monastery with the titles "To Understand the medieval monastic spaces" (2019/20), "Monastic daily life at Alcobaça - Cós. 12th - 16th centuries (2020); " Cistercian daily life. 12th - 16th centuries" (2021/22), "Lorvão monastic daily life. 13th -16th centuries" (2023). Between 2022-23 with Municipality of Leiria an event was staged for the non-specialised public called "Talk on Middle Ages".

Although already mentioned in point II, we underline the Viseu Heritage programme, where IEM was invited to design a strategic plan for management, research, and dissemination of archaeological and historical heritage at municipal level.

IEM was also engaged 4 exhibitions: 1) Loulé: territories, memories and identities (2018); Bread. Meat and Water: Medieval Lisbon Memories (Lisboa, 2019); Contemporary Interventions in Memory: Dialogues and Silence (Lisboa, 2019); Dominus Rex: the Medieval Inquiries of the Kings of Portugal (Lisboa, 2020-21); Bibliotheca iluminada - Bibles production and circulations in Portugal (Lisboa, 2021-22); and 2 temporary exhibitions at Municipal Museum of Vouzela (2019, 2023). It has also participated at the design and scientific contents of the musealisation of two medieval

towers in Vouzela (2021).

Finally, we highlight the interest shown by the media (newspapers, television) in the activities carried out by RU, as well as the profile of some of its researchers, which contributes to boosting IEM's visibility in civil society.

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

Most objectives and activities proposed in the SP 2018-23 have been achieved. However, since 2020, the implementation of the SP has been delayed due to the Pandemic, namely conditioning the work plans of researchers, especially regarding missions, but also in the opening of calls for tenders to hire the researchers foreseen in SP 2018-23.

At the same time, the Pandemic has opened new windows of opportunity. Because all the initiatives planned for those years were converted into virtual activities (workshops, international and national conferences, regular seminars, open courses for specific target groups, preparation sessions for applications for doctoral scholarships or research posts), wider, more diverse, and international audiences were reached. For example, the audience for a regular on-site activity that could reach just over a dozen attendees tripled. Scientific debate was also favoured in these circumstances.

Most of the deviations recorded were the result of either Pandemic restrictions or issues that did not depend directly on IEM. These included technical difficulties and the impossibility of carrying out activities that also depended on other partners. The Pandemic was also responsible for reinforcing IEM's budget, which made it possible to carry out activities and contracts that could not otherwise have been realised. The deviations were thus twofold: some positive and others less positive.

The positive deviations include: 1. Contract of 11 researchers within Transitory Provision (DL57/2017). This made it possible to stabilise the team and give the researchers some serenity, although temporarily (6 years); 2. The low rate of financial execution in the years of the Pandemic made it possible to hire 3 more researchers (in addition to the 2 provided in the budget allocated initially) in the respective areas of online edition of sources, sea and maritime towns, medieval religious architecture; 3. FCT financial reinforcement made it possible to open 6 master's grants, which were not foreseen in the application, allowing IEM to support all researchers regardless of academic degree and experience; 4. Achievement of various national research projects, both funded by the FCT and other institutions [see 5.2 /5.4]; 5. Creation of a resource centre with DBs, digital libraries providing medieval sources, indexes and bibliographic resources from international publishers (<https://iem.fcsh.unl.pt/en/digital-library/>); 6. Expansion of RU participation in PhD programmes from 3 to 5.

The less positive deviations are: 1. Despite the efforts made by the RU to support the submission of EU projects, through specific training, exploratory projects and technical support, not as many applications were submitted as expected. We believe that 2 factors contributed to this: the need for projects to mature after the researchers were trained, and the Pandemic itself, insofar as it generally destabilised researchers' individual work plans. Also to be considered is the effort and investment that researchers put into national applications, where IEM performed above the national average [see 5.4]; 2. Despite hiring 11 researchers through the Transitory Provision some left IEM to take up more permanent positions in other foreign institutions, leaving some disciplinary areas with fewer researchers, as was the case with Art History and Literature; 3. The Pandemic has led the IEM to postpone the creation of a Visiting Chair, which is expected to be implemented in 2024. 4. Regarding the Digital Encyclopaedia of the Portuguese Middle Ages in consortium with other universities and RU, the IEM tried several times to implement it without the partners being willing to build the project at that time. Since 2023, the IEM has decided to take over the entire project now under development. 5. It was not

possible to propose the Marie Currie International joint interdisciplinary PhD in Medieval Studies since the Pandemic context prevented sufficient partners.

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

### 6.1 Reports of the External Advisory Board in 2018-2023

<b>R&amp;D Unit</b>	<b>File</b>
Instituto de Estudios Medievais	<a href="#">2024-IEM-External-Advisory-Committee-Report.pdf</a>
Instituto de Estudios Medievais	<a href="#">2023-IEM-External-Advisory-Committee-Report.pdf</a>
Instituto de Estudios Medievais	<a href="#">2020-IEM-External-Advisory-Committee-Report.pdf</a>
Instituto de Estudios Medievais	<a href="#">2022-IEM-External-Advisory-Committee-Report.pdf</a>

### 6.2 Composition of the current External Advisory Board

<b>R&amp;D Unit</b>	<b>Member Name</b>	<b>Institution</b>	<b>Country</b>
Instituto de Estudios Medievais	Olivier Poncet	École Nationale des Chartes - PSL	France
Instituto de Estudios Medievais	Pere Verdés Pijuan	Institucion Mila y Fontanals de Investigacion en Humanidades - CSIC	Spain
Instituto de Estudios Medievais	Thomas Barton	College of Arts and Sciences, University of San Diego	USA
Instituto de Estudios Medievais	Laura Fernández Fernández	Facultad de Geografía e Historia, Departamento de Historia del Arte, Univ. Complutense de Madrid	Spain
Instituto de Estudios Medievais	José Carlos Miranda	Instituto de Filosofia, Universidade do Porto	Portugal
Instituto de Estudios Medievais	Juan Antonio Quirós Castillo	Facultad de Letras, Departamento de Geografía, Prehistoria y Arqueología, Univ. del País Vasco	Spain
Instituto de Estudios Medievais	Manuel Castiñeiras	Institut d'Estudis Medievals, Univ. Autònoma de Barcelona	Spain

## 07. Funding during 2018-2023

### 7.1 Annual funding in 2018-2023

<b>FUNDING SOURCES (TOTAL FUNDING)</b>	<b>2018</b>	<b>2019</b>	<b>2020</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>	<b>TOTAL (K€)</b>
<b>Fundação para a Ciência e a Tecnologia, I.P. - FCT</b>	511	763	924	1.112	1.022	1.040	5.372
R&D Unit Pluriannual funding (base and programatic)	60	60	201	345	420	394	1.480
R&D Project funding	50	122	101	119	100	125	617
Funding for contracts of researchers with PhD (1)	0	408	462	487	386	387	2.130
Scholarship funding for PhD, PostDoc or other fellowships (2)	400	171	160	161	113	134	1.139
Other funding	1	2	0	0	3	0	6
<b>Other national sources</b>	51	141	74	110	107	158	641
Funding received from Participant or Management Institutions	10	3	0	0	0	4	17
Public sources (3)	37	126	64	104	104	151	586
Companies, industry and other private sources based in Portugal (3)	4	12	1	0	1	2	20
Any other funding source (3)	0	0	9	6	2	1	18
<b>International sources</b>	15	295	280	316	444	558	1.908
European Commission (3)	0	271	266	265	265	271	1.338
Companies, industry and other private sources not based in Portugal (3)	1	0	11	3	7	0	22
Other funding sources (3)	14	24	3	48	172	287	548
<b>Total (K€)</b>	<b>577</b>	<b>1.199</b>	<b>1.278</b>	<b>1.538</b>	<b>1.573</b>	<b>1.756</b>	<b>7.921</b>

(1) Payed through an institution or directly to researchers with PhD integrated in the R&D Unit

(2) Payed directly to fellows, researchers or students integrated in the R&D Unit

(3) Grants, projects, fellowships, prizes received, etc

## 08. Integrated PhD holder Researchers, PhD Students and Total Research Contracts in 2018-2023

## 8.1 Integrated PhD holder researchers, PhD students and total research contracts in each year in the period 2018-2023

<b>Researchers and students</b>	<b>2018</b>	<b>2019</b>	<b>2020</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>
No. of integrated PhD researchers	57	61	60	63	62	64
No. of PhD students supervised by PhD integrated members of the R&D Unit (ongoing)	24	25	21	22	20	22
No. of PhD students supervised by PhD integrated members of the R&D Unit (concluded)	2	6	1	4	3	3
No. of contracts with national public or private entities	0	14	13	14	17	18
No. of contracts with international bodies	0	1	3	4	4	6

## 8.2 Measures implemented in the development of scientific careers

Developing the scientific careers of its researchers has been and continues to be for IEM, one of its cardinal objectives. Undertaking quality science obviously implies stabilising and retaining researchers at the RU. IEM is committed to respecting and valuing the various profiles of researchers, welcoming a great diversity of research practices, activities and outputs, from an inclusive perspective and open to new approaches and perspectives on the Middle Ages. To achieve these objectives, between 2018 and 2023 IEM implemented the following measures:

- 1) The RU's governing body invests attentively and actively in all the opportunities that have arisen, particularly through national policies and strategies, such as the DL 57/2017 Transitional Norm, which allowed the hiring of 11 PhD researchers in 2019, who until then had postdoctoral fellowships;
- 2) Providing more specialised and targeted support, in conjunction with NOVA FCSH, to researchers with regard to building and submitting applications to competitive national and international tenders, involving everyone, from senior researchers to RU staff, in building projects (e.g. workshops Applying for a CEEC, an FCT Project, or the Marie Curie PF Open Day);
- 3) Funding scholarships and scientific work contracts, covering all levels of research: master's scholarships (6 through programme funding and 4 through FCT's "Summer with Science" programme); doctoral scholarships (7 through programme funding); a post-doctoral scholarship through programme funding; a trainee researcher contract (graduate, through programme funding); and four contracts for doctoral researchers through programme funding;
- 4) Funding for training programmes aimed at researchers in order to equip them with more tools (SIG, WordPress, Latin);
- 5) Successive increases in funding for publications, missions and the acquisition of goods and services, which have enabled all researchers to realise their work plans with greater stability and national and international projection;
- 6) Financial support for missions to laboratories, libraries, museums, archives, and fieldwork for young researchers who are preparing their MA and PhD theses. This support is intended to invest in the training of researchers during their training, in order to secure a policy of retaining researchers and sustaining the RU in the future;
- 7) Financing and organising interdisciplinary and international events that have allowed researchers to make contact with their peer specialists in Medieval Studies and to learn about new approaches, themes and contexts that have contributed to the enrichment of each participant;

- 8) Implementation of monetary prizes for the best master's and doctoral theses and the best article in Medievalista, which have made it possible to highlight the excellence of certain projects, thus encouraging researchers to go further;
- 9) Internal exploratory funding awarded to three researchers to submit applications for European funding calls;
- 10) Promotion of mobility and adequate hosting of visiting researchers, most of whom are young people in training, in order to create synergies with other RUs, greater dynamics and sharing of collaborative experiences between internal and external researchers;
- 11) Promoting the quality of research by defining minimum criteria for scientific production and mentoring measures for researchers in training and those recently integrated;
- 12) Alignment with NOVA University Lisbon regarding the evaluation of researchers' performance, following the Reg. for the Evaluation of Researcher's Performance. This regulation makes it possible to achieve a standard of commitment, quality and competitiveness among researchers;
- 13) Encouragement of financial increases for researchers who promote extra-contractual activities, using the Reg. For Additional Incentives for Researchers, which is also aligned with the CoARA principles.

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

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

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

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

#### 10.1 Summary in Portuguese for publication

O IEM é a única UI em Portugal que toma por objeto de estudo a Idade Média, articulando abordagens de várias áreas científicas. Esta observação, que continua justa e válida como tal, desde a sua fundação há 20 anos, tem subjacente uma trajetória de evolução sustentada ao longo do tempo. No Projeto Estratégico de 2013, reivindicávamos uma herança científica de prestígio, uma identidade e um rumo; já no de 2018, atingido que fora o reconhecimento nacional e internacional do dinamismo da UI, apostávamos na continuidade, consolidação e crescimento como eixos do futuro projeto. Nos próximos anos, o IEM pretende ampliar esta maturidade científica e organizacional e avançar para uma posição mais central no contexto europeu, que permita aumentar o seu contributo para promover este campo de investigação/ação.

Consideramos, assim, que chegou o momento de prosseguir até um novo patamar, objetivo que se manifesta no lema - The Middle Ages in Action. A expressão não só evoca uma visão inclusiva e integradora das díspares realidades que marcaram o mundo medieval, como traduz a vontade de partilhar os dados do processo e os resultados da investigação com a sociedade, contribuindo para difundir saberes seguros e para formar cidadãos livres e com pensamento complexo.

Esta intrínseca dualidade do nosso slogan reflete-se nas palavras-chave do projeto estratégico - Património e Sustentabilidade; Materialidades e Representações; Comunidades, Identidades e Memórias; Transferência do Conhecimento e Parceria com a Sociedade Civil - que correspondem às linhas de investigação/ação a desenvolver. Palavras retomadas e particularizadas nos eixos que articulam a investigação dos dois GI e na designação das posições do Programa Tenure e dos contratos para doutorados que foram requeridos, filiando-se, ainda, nos eixos de coesão estratégica da FCSH.

A condição básica para o desenvolvimento de um projeto estratégico são as pessoas. Por isso, a UI insistirá na estabilização da carreira de investigação, num programa ambicioso de contratação internacional de investigadores, na atribuição de bolsas de doutoramento e na melhoria das condições de trabalho dos seus membros.

Neste novo ciclo, o IEM renova o seu compromisso com a Ciência Aberta, apostando numa investigação transparente e acessível, através da disponibilização em linha de recursos, fontes, dados e métodos. Também com a transferência e a criação de valor a partir do conhecimento gerado no IEM, através do desenvolvimento da marca MEDIEVAL, estrutura já em funcionamento e que se quer agora reforçar.

Através da concretização do lema Middle Ages in Action, pretendemos que a UI atinja a centralidade num universo científico mais alargado e assumimos a responsabilidade social dos investigadores: no enfrentar de atuais desafios sociais; no repensar do significado e das estratégias de salvaguarda do património medieval; ou na promoção de uma hermenêutica crítica face às (re)leituras e narrativas construídas sobre o passado.

## 10.2 Summary in English for publicity purposes

The IEM is the only RU in Portugal devoted to the Middle Ages exclusively. It combines approaches from various scientific areas underpinned by a trajectory of continuous evolution during the 20 years since its foundation. The 2013 Strategic Project revealed a prestigious scientific heritage, identity, and direction. Having achieved national and international recognition for RU's dynamism, in 2018 Strategic Project we were committed to Continuity, Consolidation and Growth as the cornerstones of the future project. Now, IEM seeks to extend the scientific and organisational maturity shown, moving towards a central position in the European medieval research context, which will allow an increase of its contribution in this field of research.

The time has come to move to a new level, condense in our motto for the next years- The Middle Ages in Action. Not only this evokes an inclusive, and integrated vision of the disparate realities that marked the medieval world, it also imparts a will to share data with society, thus contributing to the dissemination of reliable knowledge and the informing of free and complex-thinking citizens.

The intrinsic duality of our adopted slogan is reflected in the strategic project's chosen keywords: Heritage and Sustainability; Materialities and Representations; Communities, Identities and Memories; Knowledge Transfer and Partnership with Civil Society, all corresponding with the lines of activity to be developed. These keywords are taken up and detailed in the programmes of the two adjoined Research Groups (RGs) and in the

planning of the FCT Tenure Funding positions and contracts for young PhDs that have been applied for and are also part of the FCSH's nodes of strategic cohesion.

The basic condition for the development of a strategic project is people. Consequently, the RU will insist on stabilising research careers, besides an ambitious recruitment programme of international researchers, the awarding of doctoral scholarships and the maintenance and improvement of the working conditions of its members.

In this new cycle, IEM is renewing its commitment to Open Science Practices, investing in transparent and accessible research by making resources, primary sources, data, and methods available online. Going further with the transfer of value from the knowledge generated at IEM, through the development of the MEDIEVAL brand, a structure that is already in place and which we now seek to strengthen.

Through the realisation of our The Middle Ages in Action motto, the RU will seek to achieve centrality in a wide scientific spectrum, assuming the social responsibility of our researchers: in facing the many societal challenges; in rethinking the meaning and strategies for safeguarding and enhancing the heritage associated with the medieval period; and in promoting a hermeneutics in the face of the (re)readings and narratives constructed about the past, including those of different generations of historians.

### 10.3 Summary in English for assessment

The IEM is the only RU in Portugal devoted to the Middle Ages exclusively. It combines approaches from various scientific areas underpinned by a trajectory of continuous evolution during the 20 years since its foundation. The 2013 Strategic Project revealed a prestigious scientific heritage, identity, and direction. Having achieved national and international recognition for RU's dynamism, in 2018 Strategic Project we were committed to Continuity, Consolidation and Growth as the cornerstones of the future project. Now, IEM seeks to extend the scientific and organisational maturity shown, moving towards a central position in the European medieval research context, which will allow an increase of its contribution in this field of research.

Results over the last 5 years have been impressive in all areas of IEM activity, especially when combining advanced training and internationalisation. Almost from its inception, the RU has welcomed researchers from different geographical backgrounds and academic profiles, transforming itself over time into a platform for sharing methodological experiences and scientific proposals. This has resulted in an institutional culture that consistently capitalises on the knowledge and skills of senior researchers whilst stimulating the careers of more junior (with several having obtained European research contracts and university posts), strengthening comparative studies, one of the most paradigmatic aspects of RU.

The time has come to move to a new level, condense in our motto for the next years- The Middle Ages in Action. Not only this evokes an inclusive, and integrated vision of the disparate realities that marked the medieval world, it also imparts a will to share data with society, thus contributing to the dissemination of reliable knowledge and the informing of free and complex-thinking citizens.

The intrinsic duality of our adopted slogan is reflected in the strategic project's chosen keywords: Heritage and Sustainability; Materialities and Representations; Communities, Identities and Memories; Knowledge Transfer and Partnership with Civil Society, all corresponding with the lines of activity to be developed. These keywords are taken up and detailed in the programmes of the two adjoined Research Groups (RGs) and in the planning of the FCT Tenure Funding positions and contracts for young PhDs that have been applied for and are also part of the FCSH's nodes of strategic cohesion.

This research will be carried out jointly by the two RGs. Organically, they commit to creating and maintaining transversal working groups, formed around common projects including (i) Scales and Power Dynamics, including the nature of political units and their relations, in terms of diplomacy and written and visual political communication; (ii) Different Human Communities, whether linked to a territory or a religious or professional community; (iii) the Logics of Integration and Cultural Resistance, Inclusion, Segregation and Otherness; (iv) Social Networks, as well as the circulation of people, ideas and objects; (v) Material and Immaterial Heritage; and (vi) Archiving and Remembrance Techniques and the construction of shared or conflicting memories of the past. The many funded projects and RU initiatives over the last five years demonstrate the thematic harmonisation and multidisciplinary approach of these proposals.

The basic condition for the development of a strategic project is people. Consequently, the RU will insist on stabilising research careers, besides an ambitious recruitment programme of international researchers, the awarding of doctoral scholarships and the maintenance and improvement of the working conditions of its members. We will continue to invest heavily in student training programmes and advanced training as a means of rejuvenating and boosting the RU. The administrative structures will be strengthened and expanded, with a focus on professionalising the careers of science managers.

In this new cycle, IEM is renewing its commitment to Open Science Practices, investing in transparent and accessible research by making resources, primary sources, data, and methods available online. Going further with the transfer of value from the knowledge generated at IEM, through the development of the MEDIEVAL brand, a structure that is already in place and which we now seek to strengthen.

The RU will maintain its traditional inclusiveness management structure, with increased efficiency. All researchers will continue to be involved in the RU's decisions, through participation in the General Assembly, the RG plenaries, and the Scientific Committee for the Strategic Plan, with specialised committees existing in core areas: publications and the e-journal (Medievalista), the training of researchers and the transfer of knowledge to society.

A particular organisational feature of the RU is the inclusion of external researchers in all scientific, executive, and advisory bodies, with the exception of the board of directors. Thus, in addition to strong collaboration with the national and international academic community, those elements are brought into the IEM's organisation. For many years, the RU has had an advisory board for its partner organisations, a testament to the ongoing ties kept with society.

Through the realisation of our The Middle Ages in Action motto, the RU will seek to achieve centrality in a wide scientific spectrum, assuming the social responsibility of our researchers: in facing the many societal challenges; in rethinking the meaning and strategies for safeguarding and enhancing the heritage associated with the medieval period; and in promoting a hermeneutics in the face of the (re)readings and narratives constructed about the past, including those of different generations of historians.

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

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

Under the motto "The Middle Ages in Action", IEM's strategy is based on four main objectives:

I. Consolidate IEM as centre of excellence and reference internationally

II. Promote innovative, multi- and transdisciplinary, integrated and inclusive research.

III. Share knowledge, guaranteeing the universal availability of data, methods, and research results, as well as interconnectivity in Academic and Societal spheres.

IV. Supporting researchers at all stages of activity, ensuring quality advanced training and access to necessary research resources, and focusing on stabilising research careers.

To implement these objectives, 12 operational objectives were defined as follows:

1) Stimulate debate and critical thinking in Medieval Studies, sustaining collaborative work between different areas of the Social Sciences, and exploring innovative, multi- and transdisciplinary methodologies to advance research, particularly with other scientific fields including Conservation and Restoration, Chemistry, Physics, Biology, Palaeogenetics, Geology and other Natural Sciences, further developing the RU's interdisciplinary approaches;

2) Consolidate the internationalisation of RU and its researchers, supporting their participation and/or organisation of international events and projects, promoting a strategy of international exchange of researchers with other Research Centres and Universities (see 15.3);

3) Enable researchers to apply for competitive national and European funding by supporting their specific training and funding the preparation of international applications (see 15.5);

4) Support and extend the participation of the RU and its researchers in national and international research networks (see 15.3);

5) Support and expand national and international partnerships to develop new research projects and broaden funding sources, as well as to promote new opportunities for disseminating knowledge to diverse audiences and to bridge regional asymmetries.

6) Developing Citizen Science practices and projects (e.g. data collection and analysis, monitoring), particularly in the field of Cultural Heritage (tangible and intangible), carrying out research activities with communities, which will make it possible to define shared values and objectives for medieval and local heritage and increase IEM's impact in peripheral areas;

7) Strengthening Open Science practices. IEM has endeavoured to make the results of its research as widely available as possible. We now intend to take this commitment even further and make our research process and raw data available through resource centres and digital workspaces,

which will make it possible for our researchers to come together and collaborate;

8) Integrate researchers into permanent career positions, namely through the Tenure programme, for which 6 positions, including a Chair in Medieval Studies, have been proposed in the areas of: Heritage and Religious Communities, Communities, Identity and Memory; Communities and Landscape; Mobility, Representations and Identity; Medieval Archaeology; Digital Methodologies for Heritage and Archaeology; and Heritage and Memory, the latter shared with the IHC and CHAM. All positions are in line with NOVA FCSH's strategic plan, which considers Medieval Studies to be a strategic area for training and research (see 15.1).

9) Supporting young researchers in their integration into the RU. The Institute's collaborative environment favours proximity between researchers at different career levels and fosters long-term mentorship relations. IEM will also continue to provide specific research initiation training, as well as supporting the development of its projects both in terms of awarding PhD scholarships (see 15.6) and signing contracts (see 15.2), and in providing work tools and research support infrastructures (see 15.4).

10) Intensify the link between Research and Civil Society, promoting lifelong learning strategies and advanced training for the general public;

11) Cooperate with NOVA FCSH to maintain and expand the teaching offer in the field of medieval studies in all three cycles (Bachelor's, Master's and Doctorate), to ensure a constant and dynamic dialogue between teaching and cutting-edge research;

12) Developing knowledge-based strategies to protect, promote and rethink medieval heritage in collaboration with public and private institutions (Municipalities and Inter-municipal Commissions, Heritage Authorities, Museums, Libraries, Archives, Companies). This includes developing research projects, infrastructures, tools and/or training human resources in heritage management, and creating spaces for dialogue to reflect on the uses of the past and the construction of historical narratives (local, regional and national).

All these objectives fall under SDGs 4, 5, 10, 11, 15 and 17.

To realise these objectives, IEM has also devised a wide range of initiatives and activities, only some of which are listed for the sake of brevity.

l) In order to promote innovative, multi- and transdisciplinary, integrative and inclusive research of an international nature, it is planned to:

- Submit five applications to European funding programmes (ERC, ESF, HERA Projects, MSCA Training networks, COST Actions, etc);
- Continuing to join the main international research networks (e.g. CARMEN, FIDEM, MENESTREL, RURALIA, etc) and endeavouring to expand or form others;
- Promote international co-authorship, publications in partnership with foreign publishers with a universal open access policy.
- Expand partnerships to apply for funding schemes within Horizon Europe Pillar 2, namely Cluster 2, destination "Innovative Research on the European Cultural Heritage and The Cultural and Creative Industries".

- Create a collaborative networking interface where all data relating to ongoing research can be stored and accessed, particularly in projects with large data sets (e.g. landscape analysis, digital heritage reconstructions, 3D digitisation of objects and buildings, etc) and set up a Geoportal for IEM research data;

- Reinforce IEM's alignment with FCSH Plan for Gender Equality and Diversity ([https://www.fcsh.unl.pt/static/documentos/informacao/Plano\\_para\\_a\\_Igualdade\\_de\\_Genero\\_e\\_a\\_Diversidade\\_NOVA\\_FCSH.pdf](https://www.fcsh.unl.pt/static/documentos/informacao/Plano_para_a_Igualdade_de_Genero_e_a_Diversidade_NOVA_FCSH.pdf)).

II) Committed to national and international dissemination and the impact of research, the RU intends to:

- Hold regular interdisciplinary scientific meetings to create new synergies and networks, such as the "IEM Research Seminars"; "IEM Research Conferences"; "Researching in the Middle Ages"; the José Mattoso, Iria Gonçalves and Luís Krus Seminars (as the main events for sharing innovative research and discussing new trends and methodologies, honouring key researchers in IEM's inception); the "Medieval Europe on the Move", "Architectures of the Soul" Conferences and other International Events;

- Strengthen Medievalista as a space for promoting quality research in the field of medieval studies and extend its indexation on reference platforms;

- Pursue Open Science policies, continuing to make all its editions available and expanding the publication of historical sources as well as working tools (e.g. Atlases, Documentary Guides and Itineraries, Glossaries).

- Expand availability and interconnectivity with platforms and infrastructures for disseminating scientific production and research data, particularly those created or coordinated by the FCSH (ROSSIO, PRELO, RUN), in accordance with the FAIR principles, and through Outreach Actions such as Online Exhibitions and Databases;

- Enhance medieval documentary resources through the Digital Library of Medieval Studies, disseminating them on other indexing platforms;

- Strengthen the project for a Digital Encyclopaedia of the Portuguese Middle Ages (eMedieval) with the collaboration of other Portuguese RUs and universities;

- Set up an Open Access Collection of Medieval History Sources and Resources for Schools, adapted for primary and secondary schools curricula;

- Organise additional MOOCs on the Middle Ages;

- Continue to promote international scientific events with municipalities and cultural and heritage institutions;

- Develop and consolidate Medieval, IEM's brand for transferring knowledge, through Exhibitions, Virtual Realities, Games, Videos, Events, Themed Maps and Itineraries, etc;

- Ensure Lifelong Learning by organising lectures, open courses and summer schools for generalist but also more specialised audiences,

collaborating with the respective professional associations and national or local state institutions (teachers, tour guides, municipal technicians, various cultural agents);

- Continuing to take part in events aimed at the general public: Science Open Days, "Cientificamente Provável" (<https://rbe.mec.pt/np4/CientificamenteProvavel.html>), European Researchers' Night, European Heritage Days;

- Promote the "Days of the Middle Ages" as a regular event with a strong impact, with a diverse offer aimed at different audiences (Schools, Families, the General Public);

- Expand and diversify IEM's presence on social networks.

III) With a view to training and supporting researchers, it is planned to:

- Continue IEM's teaching offer in the BA, MA and PhD programmes through various courses and research initiation workshops;

- Join forces to start the recently approved Minor (BA) in Medieval Studies and to create a Master's in Medieval Studies in collaboration with CESEM, IHA, IELT;

- Continue the Autumn School for master's and doctoral students;

- Promote workshops to support researchers' applications for calls of different kinds, both national and international;

- Provide resources (digital, laboratory, audiovisual) for the development of research in the different scientific areas (see 15.4);

- Promote specific training to improve IEM's researchers' skill sets (e.g. medieval Latin, Palaeography, academic English and training in various computer resources).

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

The management structure of the strategic project which we now put forward for 2025-2029 follows closely the management rationale of IEM, the RU acting as host. The RU is governed in accordance with the statutes in force, endorsed by FCT and approved by the Scientific Council of NOVA FCSH, the elected body responsible for the scientific guidance of the institution and which includes 3 representatives from its RUs.

The degree of complexity of the SP's objectives and the tasks planned demand the implementation of governance of a kind that will ensure efficient execution and strict control over expenditure and output quality and the ability to adapt to new or unexpected situations. The management is envisaged as being participatory while avoiding undue inflexibility. This is facilitated by the dissemination of online meetings, allowing the participation of foreign collaborators, researchers on assignment and guest experts.

- RU's General Assembly: is the only body in which all PhD and non-PhD researchers participate and which has the simultaneous capacity to direct the RU and the strategic project; in fact, it is responsible for electing the Board of Directors and pronouncing on IEM's lines of action.

- Principal Investigator (PI): The chairperson of the RU's directory board will simultaneously coordinate the strategic project as its PI. Ultimately, the PI will be answerable for all decisions - scientific, financial, and logistic - pertaining to the execution of the project.

- Executive Council (EC): Presided over by the PI, the EC includes two deputy directors, the chairs of the management committees of the RGs, and a representative of e-journal Medievalista. O EC has the mission of: (i) coordinating the entire process of implementing the activities that make up the strategic project and disseminating them through the RU's communication channels; (ii) framing the tasks of the management support staff and coordinating all tasks involving NOVA FCSH and the FCT, such as annual reports and budgets.

- Scientific Committee for the Strategic Project (SCSP): Meeting once every three months, it is made up of all integrated researchers with PhDs plus 3 external members whose areas of scientific research must fall outside those covered in IEM but with whom there may be a fruitful cooperation; It is also made up of 3 representatives of the collaborating doctoral researchers and 3 representatives of the master's and doctoral students hosted by the RU. It is for the SCSP to deliberate on the project proposals submitted to the RU, based on criteria of scientific merit and the adequacy of the support being requested namely: approving the creation, merger or extinction of RGs, by virtue of specific projects or initiatives; approving, on a proposal from the Directorate, the Editorial Board of IEM's periodical publication; approving the Permanent External Commission for Scientific Advice.

- RGs coordination: the management committee will include an integrated doctoral researcher who chairs it, a representative of doctoral collaborating researchers and a representative of postgraduate students, elected by all members of the RGs.

The RG management committees will be responsible for designing, developing and implementing their annual activity programmes and financial plans, in accordance with the guidelines laid down by the Board of Directors and the SCSP. In these Annual Activity Plans, collaborative and interdisciplinary work between RGs should be evident, expressed in research, dissemination and training activities, as well as in transversal publications. Each RG is to submit a scientific and a financial plan of activities and respective report every year. The management committees of the 2 RGs meet jointly 3 times a year in order to plan and develop activities and outputs that significantly involve both RGs.

The RGs hold regular plenary meetings throughout the year to discuss and plan their activities, 2 of which should be joint meetings of the 2 RGs to discuss and debate the development of inter-RG collaborative research areas.

- The e-journal of IEM - Medievalista- is coordinated by a Director and a Deputy Director, with an international group of editors and an enlarged advisory board (<https://medievalista.iem.fcs.unl.pt/index.php/medievalista/about/editorialTeam>).

- MEDIEVAL's Executive Committee: According to the regulations approved by the SCSP, it is made up of the PI, the researcher responsible for coordinating it, a representative of the SCSP, a representative of non-doctoral researchers, a member of each RG and an external member. The committee is responsible for decision-making and monitoring the activities carried out by MEDIEVAL.

- Committee for the training of researchers: Attached to the SCSP, this is an advisory body aggregating representatives of the master and doctoral student body, senior and non-tenured postdoctoral researchers, presided over by the PI. It will assist on the planning and organizing of the advanced training program, a key aspect of the relationship established between the RU (and its strategic project) and the main host institution (FCSH).

- Scientific Council of Editions: in accordance with the regulations of the editions, approved by the SCSP ([https://iem.fctsh.unl.pt/wp-content/uploads/2024/04/Regulamento-Edicoes-IEM\\_2024.pdf](https://iem.fctsh.unl.pt/wp-content/uploads/2024/04/Regulamento-Edicoes-IEM_2024.pdf)), it is made up of 7 researchers of recognised scientific merit, Portuguese and/or foreign, representing all the scientific sub-areas of the RU, only 2 of whom may be linked to the IEM or NOVA FCTH.

- Advisory board of partner institutions: Attached to the SCSP. It includes representatives of the institutions with which RU collaborates to carry out proposals included in the strategic project, as well as the researcher who coordinates MEDIEVAL. The mission of this council is to advise researchers on the definition and implementation of collaborative work strategies with non-academic institutions.

Additionally, IEM has an:

- External Scientific Supervisory Commission (ESSC): Composed of five international and national experts on the various research areas of IEM, it provides the RU with comments, suggestions and recommendations on the efficiency of the operations, on the basis of report evaluation and annual visits.

In short, the management structure of RU and its SP combines democratic participation of all members with the effectiveness of the other bodies, each with clearly defined competences. Thus, young and senior researchers, integrated and collaborators, Portuguese and foreigners, members of academia and civil society, make their contribution for the RU's success, which they also consider to be theirs.

## 12. Proposed Research Groups

Reference	Name	Principal Investigator
RG-749-401570	Territories and Powers	TOMAS RUIZ CORDERO
RG-749-401571	Images, Texts and Representations	Paulo Esmeraldo Catarino Lopes

### (RG-749-401570) Territories and Powers

#### 12.1. IDENTIFICATION OF THE RESEARCH GROUP

#### 12.1.1 ID number of Research Group

RG-749-401570

#### 12.1.2 Research Group name in Portuguese

Territórios e Poderes

#### 12.1.3 Research Group name in English

Territories and Powers

#### 12.1.4 Keyword(s)

Rural and Urban Communities

Power Scales and Dynamics

Networks, Resilience and Resistance

Heritage and Material Culture

#### 12.1.5 The Research Group existed in 2018-2023?

Yes

#### 12.1.6 Identification and summary description of up to 3 contributions that the R&D Unit considers most relevant during 2018-2023 by researchers from the Research Group included in the application

Territories and Powers is the largest RG in the RU, bringing together the scientific areas of History and Archaeology, while establishing a bridge with various specialists in other areas of the Humanities and the Natural and Exact Sciences. In 2013, it added the subtitle "a global perspective" to its name. The aim was to emphasise the concept of scale as a privileged tool for the development of projects and to provide theoretical and methodological unity to the various research themes.

The three chosen contributions from the RG's are as follows:

1. International Conferences Architectures of the Soul. Started in 2017 in a partnership between four RUs, and with two books already available on OA, these conferences focus on the study of monastic and eremitical experiences, their relationship with the natural environment and the resulting heritage, in a multidisciplinary and comparative approach. Particular emphasis is placed on digital technologies and methods applied to buildings and landscape studies, including in training and dissemination initiatives that have accompanied these conferences, such as the Summer School on Digital Survey in Religious Architecture (2018) or the exhibition on the landscapes of Franciscan observance (2023).

2. Project IGAEDIS focuses on the study of the ancient Roman and medieval city of Egítania, a former episcopal seat, in a transdisciplinary approach that combines History and Archaeology with GIS analysis, remote sensing, anthropological and paleogenetic studies, carpology, anthropology and zooarchaeology. This is a joint project with CEIS20-UC aimed at the transdisciplinary study of this former power centre and its territory, with a view to recovering historical and patrimonial narratives relevant to its current socio-economic development.

3. Project FRONTOWNS aims to identify the role played by small towns in the articulation of a border territory between Portugal and Castile,

exploring the links (namely institutional connections, such as agreements and partnerships between towns) and personnel interchanges (circulation and mobility) that are established between these settlements. The project also uses digital modelling to reconstruct and study the urban evolution of Castelo de Vide.

These examples realise one of IEM's hallmarks - the interconnection of very different scientific areas as well as the connections between innovative research, dissemination, and societal impact, including in sparsely populated territories.

As IEM's two RGs are the backbone of the RU, it should be emphasised that it is through the transversality of approaches that the research carried out by IEM gains coherence, a fact that is evident in the regular joint organisation of many initiatives of RU.

## 12.2. Researchers of the Research Group

### 12.2.1 List of Integrated PhD holder Researchers in the R&D Unit from the Research Group

Name	Principal Investigator
TOMAS RUIZ CORDERO	✓
Adelaide Costa	
Catarina Maria Santos Guerra Tente	
Maria Alice da Silveira Tavares	
Bernardo João da Silveira de Vasconcelos e Sousa	
Carlos Alves	
André Vitória	
Amélia Aguiar Andrade	
Amélia P Hutchinson	

**Name**

**Principal  
Investigator**

CARLOS FILIPE NUNES LOBÃO DIAS AFONSO

Ana Cláudia Oliveira Silveira

Gabriel Mazoni Venturini de Souza

Gonçalo Miguel Correia Melo da Silva

Iria Gonçalves

Tiago Viúla de Faria

Tiago Pinheiro Ramos

Sara Maria Sena Esteves Prata

Miguel Gomes Martins

Maria Teresa da Silva Ferreira Lopes Pereira

Maria João Violante Branco

Maria de Fátima Botão

Mário Viana

Lluís Sales Favà

Marcelo Augusto Flores Reis da Encarnação

Vanda Lisa Lourenço Menino

**Name**

**Principal  
Investigator**

José Fabián Cuesta Gómez

Luís Filipe Simões Dias de Oliveira

Manuel Sílvio Alves Conde

Ana Paula Leite Rodrigues

André Evangelista Marques

Ana Oliveira

João Luís Inglês Fontes

José Augusto Cunha Freitas Oliveira

12.2.2 List of Collaborating Researchers from the R&D Unit who constitute the Research Group

**Name**

Vitor Pinto

Verónica dos Santos Francisco

Thiago Tolfo

Stéphane Péquignot

Sofia Catarina Gabriel Tereso

Serafim Guilherme Coelho da Rocha Cabral

## **Name**

Rute Catarina de Oliveira Cabriz

Rosa Maria Passagem da Cruz

Pedro Pina Nóbrega

Mariana Alves Pereira

Manuela Catarino

ADRIAAN LOUIS DE MAN

Adriana Filipa Gonçalves Vieira

Alberto Ferreiro

Alfonso Vigil-Escalera

Ana Cristina Encarnação Santos Leitão

Ana Filipa Firmino Sequeira Pinto Roldão

ANDER SALINAS GARRIDO

Angelo Castrorao-Barba

Carlos Crespo Amat

Charles Jonathan Wilson

Daniel Luís Pereira Sardinha

## **Name**

Cristiana Maria Simões Fernandes

Enrique José Ruiz Pilares

Gonzalo Joaquín Escudero Manzano

Isabel Cristina Ferreira Fernandes

GIULIA ROSSI VAIRO

Carla Varela Fernandes

Sandra Raquel da Silva Oliveira Martins

Rafael Pinto Borges

Mário Sérgio da Silva Farelo

Cláudio André Conceição do Nascimento Neto

Dolores Villalba Sola

Esther Tello

Francisco Jose Diaz Marcilla

Eurico Dias

Gonçalo Miguel Martins Cameira Sintrão Carvalho

Inés Calderón Medina

## **Name**

Alba Antía Rodríguez Nóvoa

Raúl Villagrasa-Elías

Raúl González Arévalo

Diogo Nuno Machado Pinto Faria

ELEONORA LOMBARDO

Harald Ernst Braun

Rosangela Aparecida da Conceição

Pedro Picoito

Luis Vicente Clemente-Quijada

Roberto José González Zalacain

Santiago Augusto Ferreira Macias

Isabel Maria Garcia de Pina Neves Baleiras

Pedro Martínez García

João Filipe Roxo Zegre Miguel

Guillermo García-Contreras Ruiz

Natália Silva Teixeira Rodrigues de Oliveira

## **Name**

Marina Afonso Vieira da Silva

Mario Pereiro Fernández

Marisa Bueno Sánchez

Maria Manuela Tavares dos Santos Silva

Gustavo Ariel Fernandez Riva

Javier Añíbarro Rodríguez

Maria João de Sá Viana Sampaio e Melo Valente

Maria Filomena Pimentel de Carvalho Andrade

Javier Albarrán

Marco António Antunes Liberato

Marcelo Moreira Andrade

Manuel Luis Real

Magali Watteaux

Margarida dos Santos Contreiras

Luísa Trindade

Luís Miguel Malva de Jesus Rêpas

**Name**

Joana Lages Vale Gonçalves

José Carlos Sastre Blanco

Luana-Narcisa Acs

José María Tejado Sebastián

Gonçalo Vidal Palmeira

Sérgio André Antunes Fernandes

Paulo Manuel Quintas de Almeida Fernandes

12.2.3 List of PhD students supervised by Integrated PhD holder Researchers in the R&D unit

**Name**

Afonso Manuel Lopes Soares de Sousa

Catarina Alexandra Horta Rosa

Claudianéia Cássia Genoveze Varotti Claudia Varotti

Alexandre Miguel Serafim Bento

Diana Neves Martins

DIOGO JOSÉ CARDOSO GOMES

João Luís Álvares Veloso

JOÃO PEDRO SANTOS ALVES

## **Name**

JOSÉ MIGUEL ZENHAS MESQUITA

Paulo Alexandre Mesquita Dias

Rodrigo Moreno Torrero

Rui Filipe Cruz Gil

Sílvia Casimiro

## **12.3. Description of the main contributions of the Research Group in 2025-2029**

### 12.3.1 General description of the Research Group

As structures, the 2 RGs facilitate research and its management, and stimulate the

convergence of synergies. The Territories and Powers RG has grown in numbers in the last 5 years, consolidating the prevalence of History and Archaeology, reinforced by admitting new researchers in the area of Cultural Heritage. A significant challenge for the coming years is to work internally on the definition of informal working groups in the RG, within the scope of the lines of research outlined. Simultaneously, the proposed management structure aims to promote and deepen collaboration between the 2 RGs, which is already underway in many themes and in specific initiatives.

Taking on the theme of The Middle Ages in Action is an added challenge to simultaneously promote excellence in research and training (both for researchers and for other audiences), the availability of the results obtained in OA, and strategies for dissemination and involvement of communities and institutions. The strong themes in this RG are particularly conducive to strengthening ties and partnerships at Local, National and International Level, in socially responsible and impactful research. These include the intersection of territorial aspects with powers and their dynamics of action, the study of communities, their logics of settlement and identity construction, and also their material and patrimonial dimensions.

The aim for 2025-29 is to develop inter- and transdisciplinary work around these themes, and to strengthen applied research projects and initiatives that can promote dialogue with other areas of knowledge. The work carried out so far involving a large number of researchers allows us to continue with themes that have already been consolidated (e.g. Powers, Territoriality, Diplomacy) and to recognise emerging areas ripe for expansion (e.g. Food, Landscape Sustainability, Palaeogenetics, among others).

# **(RG-749-401571) Images, Texts and Representations**

## **12.1. IDENTIFICATION OF THE RESEARCH GROUP**

12.1.1 ID number of Research Group

RG-749-401571

12.1.2 Research Group name in Portuguese

Imagens, Textos e Representações

12.1.3 Research Group name in English

Images, Texts and Representations

12.1.4 Keyword(s)

Written culture and visual communication

Material and immaterial heritage

People and objects in action

Identity constructions and Otherness

12.1.5 The Research Group existed in 2018-2023?

Yes

12.1.6 Identification and summary description of up to 3 contributions that the R&D Unit considers most relevant during 2018-2023 by researchers from the Research Group included in the application

This RG combines diverse disciplinary areas - History, Art History, Heraldry and Literature - aligned with the RU's strategic objectives. The three most representative contributions of this diversity are the following:

1. The Cistercian Horizons project. Study and characterise a medieval scriptorium and its production: Alcobaça. Dialogues between local identities and liturgical uniformity. This choice is epitomised in: 1) the object of study - medieval liturgical codices - a part of the Heritage studies, which cutting across the two RGs; 2) the project's interdisciplinary nature, both because of the research methodologies involved and because of the diversity of areas and disciplines of its two dozen researchers involved, from both RGs; 3) the consolidation of the study of religious communities from different perspectives, particularly as producers and disseminators of culture through a privileged object, the book; 4) the development of the study of the relationship between monastic spaces and the performativity of liturgical books; 5) and the continuity of research into illuminated manuscripts, in their materiality and image-text relationship.

2. Specialised Training courses for Tourist Guides (2019, 2020, and 2021) on "The Cistercian Daily Life " (Org. DGPC/Mosteiro de Alcobaça (MA); IEM and AGIC), which involved researchers from both RGs. These training courses provided up-to-date information from the MA, the experiences of the community that lived there and their relationship with the medieval book and its production, knowledge that guides could adapt and use in their visits. By equipping them with these skills in the training courses, we believe that the scientific knowledge developed as part of the project has had a direct impact on the training of around a hundred guides, and an indirect impact on around 5,000 visitors who have benefited over the years from the enrichment, diversity and updating of the content subsequently taught during the guided tours. The PI of this project won an university prize, coming first in a competition launched by NOVA (entitled Impact Narratives) awarding the impact of research.

3. The Exhibition Production and circulation of the Bible in Portugal. Itineraries of Romanesque Illuminated Manuscripts (Organised by IEM, CEHR UCP and Nacional Library of Portugal, 2021/2). The exhibition, including Bibles from various Portuguese institutions, was a significant event because it made the public aware of this heritage, which is rarely accessible due the manuscripts' fragility and rarity. It also brought to date knowledge about their origins, circulation and uses in medieval Portugal, in both monastic and secular contexts. It was therefore a milestone at international level.

The activities mentioned largely in complementary with the other RG, demonstrate how this RG has innovatively performed at a high level in pursuit of the objectives proposed in the last SP.

## 12.2. Researchers of the Research Group

### 12.2.1 List of Integrated PhD holder Researchers in the R&D Unit from the Research Group

Name	Principal Investigator
Paulo Esmeraldo Catarino Lopes	✓
Alicia Miguélez	
Ana Celeste Maia Pires Glória	
António José da Silva Botas Rei	
Maria Adelaide Miranda	

**Name**

**Principal  
Investigator**

Paula Filipa Freire Cardoso

Catarina Fernandes Barreira

Delmira Maria Rita Martins dos Santos Espada Custódio

Filipa da Silva Lopes

Gilberto Coralejo Moiteiro

Graça Videira Lopes

Hélio Pires

Inês Isabel simões de Abreu dos Santos Correia

Luís Manuel Correia de Sousa

Miguel Geraldés Rodrigues

Miguel Seixas

PEDRO ALEXANDRE DE SACADURA CHAMBEL

Rolando Volzone

Maria Alessandra Bilotta

MARIA ALICE PEREIRA DOS SANTOS

Maria José Palla

### 12.2.2 List of Collaborating Researchers from the R&D Unit who constitute the Research Group

#### **Name**

Abel Leandro Freitas Rodrigues

Ana Paiva Morais

Carlos Fonseca Clamote Carreto

Catarina Tibúrcio

Fabio Barberini

Rodolfo Nunes Petronilho Feio

Pedro Redol

Inês Mineiro de Abreu

Judit Gutiérrez-de-Armas

Hilário Franco Júnior

Laurent Hablot

Arsenio Dacosta

Miguel Aguiar

Ana Raquel Baião Roque

Kara Kersh

ALICE JOÃO PALMA BORGES GAGO

## **Name**

Ana Rita Saraiva da Rocha

Isabel Maria de Barros Dias

Jose Antonio Souto Cabo

Maria João Melo

Maria Coutinho

Manuel Pedro Ramalho Ferreira

Maria de Lurdes Pereira Rosa

Maria Ana Gassmann-Ramos

Lorena Pazos Romero

Rémy Cordonnier

Arthur Almeida Santos de Carvalho Curvelo

Maria do Rosário Carmona Esteves Santana Paixão

philippe josserand

José Alberto Moráis Morán

Carlos Manuel Robalo Serejo

Carmen Poblete Trichilet

## **Name**

Sonia Morales Cano

Sara Carreño López

Pedro Miguel Araújo Correia Pinto

Nuria Corral Sánchez

Patrícia Cardoso Marques

EDMAR CHECON DE FREITAS

Fábio da Conceição Almeida Gonçalves

Gisele Menezes Paes Barreto Chagas

Gloria Parrillas Pérez

Inês Coutinho

Joan Beltran Todolí

Natália Maria Lopes Nunes

Nuno Baldaque Villamariz Santos Oliveira

Miguel José da Fontoura da Cruz Fernandes

Mercedes Pérez Vidal

María Victoria Herráez Ortega

**Name**

Maria da Conceição Casanova

María Dolores Teijeira Pablos

Maria João Vilhena de Carvalho

Maria Manuela Correia Braga

Maria Encarnación Martin Lopez

James William Nelson Novoa

Angélica Varandas

João Pedro Patrício da Silva Veiga

João Miguel Costa Silva

Miguel García-Fernández

Nerea Jimena Maestu Fonseca

12.2.3 List of PhD students supervised by Integrated PhD holder Researchers in the R&D unit

**Name**

Rebeca Daniela Pontes Baptista

Camilla Marangoni

Helena Moniz

## **12.3. Description of the main contributions of the Research Group in 2025-2029**

### **12.3.1 General description of the Research Group**

There are 5 main objectives to implement according to the RU's strategy considering the members' research areas: research excellence, focused on integrating Portuguese medieval cultural production into the European context through participation in international publications and events; the OS policy, disseminating of knowledge to the general public, namely in partnership with other institutions (Municipalities, Museums, Monuments, etc), and the continuity of interdisciplinary and collaborative work with researchers from other areas and RUs, realised in the development of research networks and projects, / national and international.

The RG brings together a rich and diverse critical mass, in its combination of leading academics, doctoral researchers at several career stages, and PhD and MA students.

The goal is to maintain and consolidate collaboration with other RG, particularly by developing shared topics, namely Heritage and its materiality; studies in the context of religious communities, both female and male (and their connection to issues such as female agency); practices of power, archives and representation; communities and identities; the human relationship with nature and landscape as joint publications, scientific initiatives and, submission of research projects.

The core subjects of the RG (consolidated and emerging) are identified as follows: Heraldry as a system of visual identification and symbolic language; the production and circulation of codices and the analysis of illuminations; migration and the circulation of people, objects and ideas (from diplomacy to pilgrimages, including religious affairs) will continue to be core issues in the RG; the construction of identity, registers of otherness and interculturality (themes with a high impact taking into account migratory phenomena and current armed conflicts); medievalism and its contemporary appropriation; Islamic civilisation.

## **13. Thematic Lines**

The minimum number of confirmed integrated researchers in order to fill thematic lines information is 100 and you have only 54.

## **14. Ethical issues**

### **14.1 Ethical issues**

IEM is committed to comply in all its activities with the highest ethical standards and guidelines, as stated in NOVA University of Lisbon (NOVA)'s Code of Ethics and Personal Data Protection Regulation ([https://www.unl.pt/sites/default/files/reg\\_cons\\_etica\\_ceunl.pdf](https://www.unl.pt/sites/default/files/reg_cons_etica_ceunl.pdf)), the European Code of Conduct for Research Integrity, including the Open Access and FAIR principles, the EU's General Data Protection Regulation, and the Portuguese Code of Author's Right and Ancillary Rights.

IEM has its own ethical statement ([https://iem.fcsh.unl.pt/wp-content/uploads/2023/10/ETICA\\_IEM.pdf](https://iem.fcsh.unl.pt/wp-content/uploads/2023/10/ETICA_IEM.pdf)) and is committed to actively promote a policy of non-discrimination and equality, so that no member of this Institute be favored, prejudiced or deprived of any right or from any duty on the grounds of ancestry, age, sexual orientation, marital status, family situation, economic situation, education, social origin or condition, genetic heritage, reduced labor capacity, disability, a chronic inability to work, chronic illness, nationality, ethnic origin or race, territory of origin, language, religion, political or ideological convictions and union membership. Any question or necessity of review regarding ethically sensitive subjects and issues are submitted to NOVA FCSH's Ethics Committee (<https://www.fcsh.unl.pt/faculdade/comissao-de-etica/>), which serves as the Faculty's ethical review board. The committee provides advice and eventually clearance on matters such as: participants information and consent, data collection, processing, storage, through to the publication of research results. Researchers can further seek guidance on GDPR compliance from NOVA's Data Protection Officer and on digital research issues from the Digital Research Development Center.

Furthermore, IEM also holds a Declaration of Ethics and Good Publishing related to its Medievalista e-journal (<https://medievalista.iem.fcsh.unl.pt/index.php/medievalista/BoasPraticas>).

Research conducted at IEM is not normally ethically sensitive, however, some research projects involve the use of personal information and data or images (photography or video). In this regard, researchers always guarantee the informed consent procedure, which includes the explanation to research participants what the research is about, what their participation in the project will entail and which are the eventual risks that may be involved before obtaining their express permission to include them in the project. In accordance with the FAIR principles, it is guaranteed that in the case of the use or make data available for future research projects is also explicit in the consent.

## 15. Aspects of the Activity Plan that involve requesting Programmatic Funding

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

	<b>2025</b>	<b>2026</b>	<b>2027</b>	<b>2028</b>	<b>2029</b>	<b>Total</b>
Required amount	441450	441450	441450	464550	464550	2253450

Currently IEM has 13 researchers with non-permanent positions which cover various scientific areas and research topics: CEEC (3); DL57 (7); and Programmatic Funding (3). Among these, 3 will finish the contract at the end of 2024; 8 will end at the beginning of 2025, and 2 will end in 2027. Nevertheless, one has already obtained a CEEC position (PI), and another will retire.

In this scenario, IEM's full-time researchers will decrease from 13 to 3 within a year, and further to 1 by 2027. To support the ambitious strategic plan of RU 2025-29, ambitious research hiring plan is essential. Two plans for hiring researcher funding are designed: 1st- based on the logic that

all 6 positions proposed at FCT Tenure/2024 will be accepted; 2nd- mitigation plan that considers the possibility of non-funding of all positions proposed.

## 1st Scenario

IEM has proposed the following positions at the FCT Tenure funding:

1. A Chair specialised in Medieval Studies, particularly in Heritage and religious communities, to enhance research on strategic topics such as Heritage and Communities, Identity and Memory, Materialities and Representations; to strengthen research on Medieval Liturgy and communities; to elevate the RU to global recognition establishing it as a national and international benchmark; to provide teaching and mentoring to students. This contract is vital for FCSH's strategic lines in Memory and Heritage and Arts and Humanities, 2 of the 5 key areas supporting its mission up to 2030;
2. Assistant Research in Medieval Studies, specifically in Mobility, Representations, and Identity, topics relevant facing contemporary challenges like increased migration, cultural adaptation, and discrimination. These have been central to our 2 RGs and projects. We aim to enhance them further, exploring innovative methodologies linking historical phenomena, wide-scale comparisons, and interdisciplinary approaches.
3. Assistant Research in Medieval Studies, specifically on Communities and Landscape, which will solidify RU's strategic by studying medieval society and its connection to the natural environment. We aim to strengthen this area, exploring fresh and fostering collaboration with social and natural sciences.
4. Assistant Professor in Medieval Archaeology, with expertise on rural and urban archaeological contexts, who will supervise and train younger researchers. Next funding cycle, we aim to enhance this area, exploring innovative approaches and methods reflecting our collaboration with social and natural sciences.
5. Assistant Professor in Digital Methodologies applied to Medieval Archaeology and Heritage, as vital for medieval archaeology research. We aim to enhance this area with innovative approaches and methods, reflecting our collaboration with social and natural sciences.
6. Assistant Researcher specializing in community identity narratives, emphasizing their significance in collective memory. The position is not limited to medieval studies; researchers from CHAM or IHC can be considered. At IEM, the researcher will solidify RU's strategic focus on Medieval Heritage and Memory, central to our research groups and projects.

Additionally, we seek to strengthen our team with 3 5-year, full-time fix-term contracts (in the current framework of RU funding, this option is the only possible one) in these areas:

7. Junior researcher specialised on knowledge transfer and social impact, to work closely in collaboration the other researchers, developing social impact projects based on the knowledge produced at IEM aiming to innovate and provide social and economic value, in the frame of Medieval brand project;

8. Junior researcher specialised data science and digital medieval heritage, aiming to advance the publication and digital dissemination of sources, areas in which IEM has invested heavily in recent years;

9. Junior researcher specialised in Medieval Studies related with Communities, heritage, and memory. This is a strong research area of RU which is common to the 2 RGs and the various scientific areas that make up the IEM. The research and its outputs will also reinforce IEM's publication strategy via quality products.

## 2nd Scenario

In this plan of mitigation we expect, at the minimum, that the FCT Tenure instrument will fund only 3 positions. IEM programmatic funding will support the 3 full-time fix-term already mentioned, and 2 more research positions will need to be added to fill positions not funded by FCT Tenure.

The proposed budget reflects the second scenario, which entails higher expenses within the RU's programmatic funding. It considered the co-funding of the Chair as defined by the FCT Tenure funding, and 5 years full-time fix-term for 7 PhD research fellows. The hiring of 8 full-time researchers represents only 14% of the integrated researchers' team at the RU. Without funding for these 8 contracts hires, the execution of the proposed work plan is at risk, hampering the future of medieval studies in Portugal.

### 15.2 Funding for early career researchers

	<b>2025</b>	<b>2026</b>	<b>2027</b>	<b>2028</b>	<b>2029</b>	<b>Total</b>
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Required ammount	90000	90000	270000	180000	180000	810000
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The Institute's collaborative environment favours close relationships between researchers at different career stages and promotes long-term mentoring relationships. IEM will also continue to provide specific training for research initiation and advanced training, as well as guaranteeing support for the development of its projects, both in terms of awarding PhD scholarships and employment contracts and in providing working tools and infrastructures to support research. Furthermore, IEM provides funding for:

- a) training programmes aimed at researchers to equip them with more tools (e.g. SIG, Paleography, Medieval Latin);
- b) publications;
- c) acquisition of goods and services, which have enabled all researchers to achieve their work plans;
- d) missions to laboratories, libraries, museums, archives, and fieldwork to who are preparing their MA to PhD theses.

The aim of this support is to invest in training researchers during their formation, in order to have a policy of retaining researchers and sustaining the RU in the future. In the last 5 years we have achieved a ratio of 3 per year successfully concluded PhD thesis, totaling 19 new PhD Thesis in different scientific areas and most of them with a strong interdisciplinary character.

In this research environment, we aim to contract early researchers in both consolidated and emerging research topics. These contracts are crucial to increase employment opportunities for early career researchers, contributing to the greater attractiveness for young researchers and

guaranteeing the rejuvenation of RU. In this way we expect to provide a team long-term sustainability. The contracts to Early Career Researchers areas in medieval studies are as follows:

1) Data science and digital heritage. This position aims to consolidate the Digital Encyclopaedia of The Portuguese Middle Ages and to implement the IEM Research Geoportal, which is an online platform for sharing and visualising geospatial data produced as part of IEM's research. The platform fulfills 3 functions: a) geospatial data management; b) visualisation of geodata in the browser (interactive maps, overlapping layers, etc.); c) geodata availability and sharing (download and Web Map Service and Web-Feature Service protocols).

2) Islamic or/and Jewish studies. It is expected that this contract will reinforce the studies that have been carried out in these areas. This is essential to research on the IEM's converging theme, the circulation of people and knowledge in the Middle Ages, the dynamics of social and religious inclusion and exclusion and the influence of these communities in medieval societies;

3) Gender studies. Taking advantage of RU's interdisciplinary environment, it is intent that the researcher could be able to develop research focus on the complex interaction of gender with other identity markers such as religion, sexuality, provenience, social/professional position and ethnicity;

4) Rural and urban communities. Both rural and urban medieval studies have a strong tradition of research at IEM, also among students. This contract gives young researchers the chance to compete for a job that will reinforce these two essential research topics for the knowledge the medieval past and to understand the nowadays social features on transdisciplinary approach. It is also expected that this researcher will align their work with local communities, delivering socio-economic value and strengthen their cohesion and identity;

5) Mobility - people, goods, and ideas. In continuity with the last SP this is a current and pertinent research topic. Mobility is understood as the movement and circulation across the medieval space, namely of people, ideas, and/or goods, as can be found in activities such as diplomacy, travels, migrations, warfare, or education. Given the large scope of the topic it is expected that the researchers will explore new research objects and fresh methodological approaches to reinforce the IEM's position in this regard;

6) Cultural Heritage. This is also a wide topic, and an area in which IEM has made solid progress, obviously focusing on medieval cultural heritage (tangible and intangible), which includes heritage as diverse as archives, texts, daily life objects and structures, art, sites, and landscapes. We hope to contract an early career researcher that can proposed a bold transdisciplinary project that can bring new perspective and methodologies to this research area.

The proposed budget is based in the contract of 2 junior positions in the 1st year (2025) and 4 more in 3rd year (2027).

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

<b>2025</b>	<b>2026</b>	<b>2027</b>	<b>2028</b>	<b>2029</b>	<b>Total</b>
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Required ammount	72000	49500	77000	54500	72000	325000
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As mentioned in 11.1 the RU is strongly committed to extending its internationalization. For this, RU has designed a set of objectives and activities seeking to increase the international visibility of the institute, its research, and researchers, with a focus on consolidating and expanding RU's international position as a benchmark in the field of Medieval Studies. To achieve this, the IEM's strategy includes the following:

- 1) To attract new international expertise in Medieval Studies;
- 2) To retain international researchers who bring new value in terms of approaches to the study of medieval contexts;
- 3) To provide our researchers with the skills that will enable them to be more regularly present at international discussion forums. Also financially supporting the realisation of scientific activities with an international scope, such as conferences, work meetings, publications and other events with an international impact;
- 4) To improve IEM's participation in international research networks.

To operationalise this strategy, IEM will:

- a) Award every two years a Professorship, which intends to attract international researchers of reference for a stay at our institute aiming to promote synergies for the construction of new projects, and also participate in the training of our students and researchers (30 000€);
- b) To expand the dissemination of IEM in international RUs and universities, as a centre of excellence to host research stays. To this purpose, IEM disseminates the accommodation conditions for foreign researchers, namely through their integration as members of the RU with access to the resources that are available to all IEM integrated researchers. This process has prompted a flow of people, themes, approaches, and observation scales, boosting comparative studies (promotional materials and missions - 10 000€).
- c) The contracts mentioned at 15.1 and 15.2 are addressed to doctoral graduates of any nationality or stateless persons with a degree in any scientific field who wish to carry out scientific research in medieval studies, fitting the profile defined in the tender;
- d) To promote joint international publications, favouring international co-authorship, with foreign publishers with an open access policy. It is expected to spend a ratio of 26 000€ per year, in volumes and papers in co-publishing with other international institutions (130 000€);
- e) "The Middle Ages in Action" also seeks to support the organisation of interdisciplinary and international events allowing researchers to connect with their peers specialising in Medieval Studies and learn about new approaches, themes and contexts that contribute to their enrichment. It is expected to support these activities in an amount of 10 000€ per year;
- f) To promote and disseminate the research carried out at IEM, we support financially the missions of researcher to participate in international works, scientific meetings and informal networks meetings. We expect to spend an average of 9 000€/year (45 000€);
- g) To ensure our integration into the main research networks and formal and informal networks of medievalists (CARMEN, FIDEM, MENESTREL, RURALIA, etc.), and seek to expand or form others (18 000€);
- h) To make MOOCs produced by IEM on Middle Ages available in English, in order to reach wider and international audiences. The investment expected is 3 000€/year (15 000€);

i) To promote an Internationalisation Award to reward our researchers who engage in more internationalisation activities and outputs of their research. This prize will be awarded every 2 years (8 000€);

j) Support for foreign language publishing through access to funding for translations and linguistic revisions and specific training in academic English. We hope to invest 2000€/year in these activities (10 000€);

k) To fund activities related with the support to visiting researchers (2 000€/year).

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

	<b>2025</b>	<b>2026</b>	<b>2027</b>	<b>2028</b>	<b>2029</b>	<b>Total</b>
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Required amount	84000	6000	6000	6000	6000	108000
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IEM's strategy in terms of funding infrastructure and equipment aims to realise three fundamental objectives that result from current research requirements and the need for increasingly transdisciplinary and methodologically challenging research. These two objectives can be summarised as follows:

1) To ensure the modernisation of the IT infrastructures and the replacement/updating of the IT park;

2) To equip and provide the team with equipment that allows the development of multi- and trans-disciplinary research, as well as instruments that enable greater dissemination of scientific results;

3) To respond adequately to the challenges of Open Science.

As part of the open science policy, it will be important in coming years to strengthen IT resources to ensure modernisation, but also to increase the capacity and interoperability of more research data in different and varied formats - textual, audiovisual, geospatial and 3D. It is important not only to catalogue, store and make available this data, but also to increase the capacity for processing large amounts of information resulting from research in the areas of digitisation and 3D modelling of landscapes, objects, and buildings. Alongside research, these resources have been leveraged as heritage visualisation tools.

To implement this strategy, the following acquisitions of equipment and infrastructures will be necessary:

- Access to Cloud servers - for large data storage and to create virtual workspaces for all researchers (6 000€/year), in this regard we hope to be able to access OCRE Infrastructure during the SP 2025-2029;

- 7 Laptops (1200€ each), to fulfill the necessities of the full-time contract researchers;

- 2 Desktops with high processing capacity (4000€/each) - to equip IEM in large data management and processing data namely resulting from Digital 3D Models;

- 1 Scanner A3 (2500€) - to digitise various types of documentation;

- Portable scanner 3D (25 000€) - to digitalise objects and structures, fundamental for research and also for scientific dissemination.
- 3D Print (5 000€) - to create models of objects and structures very useful in dissemination activities.
- Slide Scan (200€) - it is important to ensure high quality digitalisation of legacy data, especially that which is recorded in outdated formats;
- 2 ultraviolet light (400€) - essential for the analysis of marks and other indications of uses of medieval documentation that is otherwise invisible.

The demands of field and laboratory work have increased and are expected to increase further during the next SP. Despite the outsourcing that we have been monitoring, there is equipment that needs to be acquired:

- Digital microscope (4000€) and binocular magnifier (2000€) - for micro and macroscopic analyses of various materials - organic and inorganic;
- Drone with infrared camera (2 000€) - to be used in landscape modelling research and also to capture images of research and dissemination activities;
- Differential GPS (17 000€)- for archaeological and landscape studies;
- Video camera (2 000€), external microphones (500€) and digital audio/voice recorder (500€) - this equipment will be essential for research involving interviews and to record activities and for social media posts.

As mentioned at 1.4 the possibility of providing IEM with a physical space and specialised instruments of research (digital and analogic) will increase IEM's laboratory intensity in the next years. This will not only attract new researchers but also train researchers in new topics and new methodologies and increase the capacity of dissemination demanded by the open science policy.

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

	<b>2025</b>	<b>2026</b>	<b>2027</b>	<b>2028</b>	<b>2029</b>	<b>Total</b>
Required amount	32500	32500	32500	32500	32500	162500

At the IEM's SP the increase in applying to international research calls is a pivotal point. We expect to submit 5 applications to European funding programmes. To reach this objective IEM has already implemented an exploratory award, that is in its 2nd edition (2022, 2023). In the next years we hope to grant 2 exploratory awards for international proposals per year, increasing the award from 5 000€ to 10 000€ (20 000€ /year). These support funded activities are related with the preparation of applications, including grants for assisting in the preparation of proposals; travel and accommodation of members of the project team; translations and revisions of texts, training of the PI; specialised training workshop(s).

The rules of access for this award are available at [https://iem.fcsh.unl.pt/wp-content/uploads/2024/04/Exploratory-funding-for-international-projects-of-the-Instituto-de-Estudos-Medievais\\_15\\_07\\_2022.pdf](https://iem.fcsh.unl.pt/wp-content/uploads/2024/04/Exploratory-funding-for-international-projects-of-the-Instituto-de-Estudos-Medievais_15_07_2022.pdf)

Even if the researcher fails to obtain the award, the researcher can still access IEM's supports. These include specialised training on the specific

funding scheme, in the preparations of interviews and to tailor the CV to fully adequate to the nature of the call.

IEM also intends to organise working meetings with PI's from funded European projects in order to advise and challenge our researchers in the preparation of applications. The aim is to create a pool of mentors specialised in medieval studies and with experience in applying for and managing European projects. To achieve this objective, we will spend 5 000€/year.

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

	<b>2025</b>	<b>2026</b>	<b>2027</b>	<b>2028</b>	<b>2029</b>	<b>Total</b>
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Required amount	90000	72200	90000	54400	54400	361000
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IEM participates directly and indirectly in 5 doctoral programmes. The 1st programme to be highlighted is the PhD in Medieval Studies (DEM) (<https://www.fcsh.unl.pt/en/courses/medieval-studies-e-learning/>), the result of a partnership between NOVA University of Lisbon and Open University (UA) and which operates in a regime of e-learning with a brief face-to-face component. This programme, which involves several RUs (IEM, CESEM, CLUNL, IELT, and IHA), aims to promote advanced, multi-, and interdisciplinary training in the field of Medieval Studies. All students have to develop interdisciplinary research and are jointly supervised by at least, 2 supervisors from different scientific areas. The fact that it is an e-learning system makes it possible to recruit foreign students, and the international component is also provided through several partnerships that have been established with Spanish universities where, under ERASMUS+, doctoral students can attend seminars and complement their training if they so wish.

The History PhD programme (<https://www.fcsh.unl.pt/en/courses/history-2/>) offered by FCSH has a long tradition in training medievalists. The doctorate enabled a specialisation in Medieval History, guaranteed by a seminar of specialisation, which complements the research on topics within medieval history. It also includes a specialisation on archaeology, within which several students have defended their PhD thesis on medieval archaeology topics.

IEM also collaborates in the PhD programme Conservation and Restoration of Cultural Heritage (CORES), which is offered by Nova School of Science and Technology (NOVA FCT). It aims to provide students with cross-discipline training, ranging from the natural and exact sciences to the social and human sciences and encourages them to pursue inter-disciplinary research which exposes them to different methodologies (<https://sites.fct.unl.pt/doutoramento-conservacao-restauro-patrimonio/pages/about>).

In 2023-24 the PhD in Archaeology was launched at NOVA (<https://guia.unl.pt/en/2023/fcsh/program/5104>). The PhD programme structure implies specialisations in different research topics such as Landscape Archaeology, Heritage Management and Public Archaeology, Archaeometry, Archaeology of Architecture and Construction, and Maritime Archaeology. All specialisations include the possibility of developing research on the medieval period. In its first editions one of the students is integrated at IEM and more are expected more in the coming years.

IEM also participates with professors and researchers in the History of Art PhD programme (<https://www.fcsh.unl.pt/en/courses/history-of-art-2/>), which have expertise in Medieval Art History. This is a core scientific area of the institute that we intend to promote and expand in the near future, including through the advanced training of students.

The criteria for selections and admission to each programme is defined by the regulatory standards regarding the doctoral study cycles of FCSH. The quality of each programme is guaranteed by NOVA University quality measures and instruments. The selection of candidates to IEM's PhD

scholarships is based on high quality academic and research standard that prioritise 3 main criteria: Academic Training and Corresponding Grades, Scientific Curriculum and, Research Quality and Feasibility. Regarding the research project It is mandatory that it be developed within Medieval Studies.

To ensure the development of Medieval Studies in its various areas of training, the IEM will award the following doctoral scholarships in SP 2025-29:

- 5 grants to students from DEM PhD programme (1 per year)
- 5 grants to students from History PhD programme (1 per year)
- 5 grants to students from Archaeology PhD programme (1 per year)
- 3 grants to students from History of Art PhD programme (1 in the years 2025, 2026, 2027)
- 2 grants to students from CORES PhD programme (1 in the years 2025, 2027).

This proposal enables advanced training in inter- and transdisciplinary research, approaches clearly favoured by IEM, creating equal opportunities for all students who want to pursue their studies full-time. IEM's research environment will challenge them and will provide the support and mentoring they need to develop innovative and significant research for the advancement of medieval studies. IEM will also give financial support for missions to laboratories, libraries, museums, archives, and fieldwork. Support for participation in scientific meetings is also provided. Moreover, the PhD Students will have also access to several informal courses for the improvement of our researchers' skill sets, already mentioned at 11.1.

In this way, IEM also aims to ensure the generational renewal of its researchers, guarantee the sustainability of the RU in the future, and to stimulate openness to innovative approaches and research themes.

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

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

<b>FUNDING SOURCES (TOTAL FUNDING)</b>	<b>2025</b>	<b>2026</b>	<b>2027</b>	<b>2028</b>	<b>2029</b>	<b>TOTAL (K€)</b>
<b>Fundação para a Ciência e a Tecnologia, I.P. - FCT</b>	381	238	237	75	75	1.006
Project funding expected to be received	60	0	0	0	0	60
Expected funding for contracts of researchers with PhD (1)	213	165	165	75	75	693
<b>Total (K€)</b>	<b>401</b>	<b>238</b>	<b>237</b>	<b>75</b>	<b>75</b>	<b>1.026</b>

<b>FUNDING SOURCES (TOTAL FUNDING)</b>	<b>2025</b>	<b>2026</b>	<b>2027</b>	<b>2028</b>	<b>2029</b>	<b>TOTAL (K€)</b>
Expected funding for PhD, PostDoc or other fellowships (2)	108	73	72	0	0	253
Audit certificates	0	0	0	0	0	0
Other funding	0	0	0	0	0	0
<b>Other national sources</b>	20	0	0	0	0	20
Funding expected to be received from Participant or Management Institutions	0	0	0	0	0	0
Public sources (3)	20	0	0	0	0	20
Companies, industry and other private sources based in Portugal (3)	0	0	0	0	0	0
Any other funding source (3)	0	0	0	0	0	0
<b>International sources</b>	0	0	0	0	0	0
European Commission (3)	0	0	0	0	0	0
Companies, industry and other private sources not based in Portugal (3)	0	0	0	0	0	0
Other fundingsources (3)	0	0	0	0	0	0
<b>Total (K€)</b>	<b>401</b>	<b>238</b>	<b>237</b>	<b>75</b>	<b>75</b>	<b>1.026</b>

(1) Payed through an institution or directly to researchers with PhD integrated in the R&D Unit

(2) Payed directly to fellows, researchers or students integrated in the R&D Unit

(3) Grants, projects, fellowships, prizes received, etc.

16.2 Expenditure budget of the R&D Unit at the Main Management Institution

### **Universidade Nova de Lisboa (UNL)**

<b>Expense Budget items</b>	<b>2025</b>	<b>2026</b>	<b>2027</b>	<b>2028</b>	<b>2029</b>	<b>TOTAL (K€)</b>
<b>Human Resources</b>	324	238	237	75	75	949
Contracts of researchers with PhD	213	165	165	75	75	693
PhD, PostDoc or other fellowships	111	73	72	0	0	256
Contracts of technical or secretarial staff	0	0	0	0	0	0
<b>Missions</b>	35	0	0	0	0	35
<b>Visiting researchers or consultants</b>	0	0	0	0	0	0
<b>Patents registration and maintenance</b>	0	0	0	0	0	0
<b>Service or product procurement and acquisition</b>	42	0	0	0	0	42
<b>Total (K€)</b>	<b>401</b>	<b>238</b>	<b>237</b>	<b>75</b>	<b>75</b>	<b>1.026</b>

<b>Expense Budget items</b>	<b>2025</b>	<b>2026</b>	<b>2027</b>	<b>2028</b>	<b>2029</b>	<b>TOTAL (K€)</b>
<b>Equipment</b>	0	0	0	0	0	0
<b>Adaptation of facilities and buildings</b>	0	0	0	0	0	0
<b>Audit certificates</b>	0	0	0	0	0	0
<b>Other expenses</b>	0	0	0	0	0	0
<b>Total (K€)</b>	401	238	237	75	75	1.026

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

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

<b>Expense Budget items</b>	<b>%</b>
<b>Human Resources</b>	30 %
Contracts of researchers with PhD	0 %
PhD, PostDoc or other fellowships	2 %
Contracts of technical or secretarial staff	28 %
<b>Missions</b>	12 %
<b>Visiting researchers or consultants</b>	12 %
<b>Patents registration and maintenance</b>	0 %
<b>Service or product procurement and acquisition</b>	20 %
<b>Equipment</b>	1 %
<b>Adaptation of facilities and buildings</b>	0 %
<b>Audit certificates</b>	0 %
<b>Other expenses</b>	25 %
<b>Total</b>	100 %

## 17. Budget justification for 2025-2029

17.1 Justification of the total proposed budget

Between 2020 and 2023, the IEM relied on a total Base Funding (BF) budget of €791,699, which, spread over the four years, averaged €197,925 to cover all daily expenses of the RU. The financial progress and consolidation of the RU, particularly evident from 2020 onward, considering that in

2018 and 2019 the IEM had only about €60,000 in budget allocation for its SP, enabled us effectively to pursue the scientific objectives set for that period. The BF distribution was primarily allocated over 6 categories: Human Resources (RH), Consultants, Missions, Acquisition of Goods and Services, Demonstration, Promotion and Dissemination of Project Results, Equipment, and Other Expenses (OE). Based on the historical financial execution and considering the objectives outlined in section 11.1 of the current application, the RU proposes the following budget distribution for the period 2025/29 regarding its BF:

- 1) RH, 30 %. This category will ensure the salaries of two secretarial staff contracts and master's students' scholarships over the five years.
- 2) Service or product procurement and acquisition, 20%. This category will cover expenses for the management services of the Medievalist journal, as well as its indexing, the acquisition of services for Open Access availability of various editions produced within the SP, expenditures related to activities and outputs, such as translations and text revisions for publication in Open Access, mainly in international publications, the acquisition of essential services for the daily work of the RU, such as access to digital programs and tools, bibliography acquisition, laboratory analyses in research in Archaeology and Art History, funding for the training plan aimed at researchers, expenses related to the organization of major events planned within the SP, and expenses inherent to the practice of Open Science. Within this framework, the update and modernization of some fundamental databases in the area of Medieval Studies of national and international interest are foreseen. Another notable expense will be the costs involved in producing materials for the dissemination and communication of science, essential for the scientific events of the RU.
- 3) Missions, 12%. In this category, expenses related to registration, travel, accommodation, and per diem inherent to the participation of researchers in national and international conferences, working meetings, research missions in libraries, archives, museums, and fieldwork will be allocated. This funding is crucial for the realisation of researchers' work plans.
- 4) Visiting researchers or consultants, 12%. This category will encompass expenses related to the travel and accommodation of scientific consultants and invited expert speakers to participate in the scientific events hosted by IEM.
- 5) Equipment, 1%. This category includes expenses related to the acquisition of computers and a printer for secretarial staff and laptops for the IEM research team.
- 6) OE, 25%. This category includes expenses without direct and exclusive contribution to the execution of the SP, such as: energy and water consumption; landlines, postal and computer communications, etc.

Regarding Programmatic Funding, it is important to emphasize once again that the amounts requested in the tables of section 15 are essential for implementing plans for advanced training, hiring, career development and stabilization, internationalization, fundraising, and provision of infrastructure and equipment for the RU. Without this funding, the successful execution of the proposed SP is not feasible. In addition to these values, the categories of Service or product procurement and acquisition and Missions of the Programmatic Funding must be endowed with a budget that allows covering all actions and outputs necessary for the successful execution and completion of the work plan of each of the contracted individuals outlined in section 15.

#### 17.2 Justification of the Human Resources component in total proposed budget

In the Base Funding, the Human Resources category will ensure the salaries of two secretarial staff permanent contracts, essential resources to continue supporting the research team, the board, and other committees of the RU. A Science Manager will oversee the overall financial and

scientific management of the RU, and a Science Communicator will be responsible for all science communication matters at the IEM. In addition to salaries, this category will cover respective Social Security contributions, personal accident insurance, salary updates, and pay grade increases. A RU, together with FCSH, will actively contribute to the training and specialization plan for these human resources so that they can respond most effectively to the needs of the research team.

Funding for master's student scholarships is also included in this category. It is an IEM commitment to provide support to researchers at different stages of their research careers, so while Programmatic Funding will finance PhD student scholarships, contracts for recent PhD graduates, and for PhD holders with extensive CVs, Base Funding will cover the cost of masters' student scholarships, allowing their integration into the RU and the practical research context. If the funding is as expected, RU intends to open at least 6 research grants for master's students between 2025 and 2029.

Regarding Programmatic Funding, as is seen in point 15 of this form, this will support the costs of hiring experienced doctoral researchers, newly graduated doctors, and funding scholarships for doctoral students. In the presented values, in addition to salaries and research grants, we have taken into account expenses such as Social Security contributions, personal accident insurance, salary updates, and pay grade increases. To implement the SP and increase laboratory intensity, it is necessary to emphasize again that researchers will have other expenses related to the development of their respective work plans, so it is crucial to strengthen not only the Human Resources category but also Service or product procurement and acquisition and Missions.

#### 17.3 Justification of the Equipment component in total proposed budget

In the Base Funding the Equipment category will include expenses related to the acquisition of computers and a printer for secretarial staff to use in the daily management tasks of the RU. The wear and tear caused by the daily use of this equipment makes it necessary to constantly replace it. Additionally, laptops will be purchased for the research team to be used during the execution of the work plan. Two computers for staff, one printer, and three laptops for the research team.

The Programmatic Funding, in turn, will provide the institute with various equipment itemised in point 15 of this application, which will allow: modernisation of the IT infrastructures and the replacement/updating of the IT component; to equip and provide the team with tools that allow the development of multi- and trans-disciplinary research, as well as instruments that enable greater dissemination of scientific results; to respond adequately to the challenges of Open Science; and increase laboratory intensity of the RU between 2025 and 2029.

## 18. Composition of the future External Advisory Board

### 18.1 Composition of the future External Advisory Board

<b>Name</b>	<b>Institution</b>	<b>Country</b>
Laura Fernández Fernández	Universidad Complutense de Madrid	Spain

<b>Name</b>	<b>Institution</b>	<b>Country</b>
Juliette Day	University of Helsinki	Finland
Juan Ant3n3o Quir3s Castillo	Universidad del Pa3s Vasco	Spain
Jos3 Francisco Meirinhos	Universidade do Porto	Portugal
Pere Verd3s Pijuan	Institucion Mila y Fontanals de Investigacion en Humanidades	Spain

Declaration of commitment of the R&D Unit

2024-04-16 10:39 By Catarina Maria Santos Guerra Tente

Declaration of commitment of the Main Management Institution

2024-04-16 10:47 By Isabel Rocha