

CALOUSTE GULBENKIAN FOUNDATION

GULBENKIAN INSTITUTE OF SCIENCE

RESEARCH FELLOWSHIP REGULATIONS

(October 2021)

CHAPTER I

GENERAL PROVISIONS

Article 1

(Scope)

1. The present document, approved by the Foundation for Science and Technology (FCT) under Law no. 40/2004, of August 18th, amended by Decree-Law 123/2019, of August 28th, applies to research fellowships awarded by the Calouste Gulbenkian Foundation (FCG), through the Gulbenkian Institute of Science (IGC), for the pursuit of scientific, technological and training research activities at the IGC.
2. These Regulations are applicable to fellowships financed by the IGC and awarded within the scope of community programs or other programs and partnerships in which the IGC is the host entity.
3. This regulatory review arises from the need to standardize the typology of IGC grants with the nomenclature and regime of fellowships contained in the FCT Research Fellowships and Grants Regulations, taking advantage of the new Rules for Attribution and Management of Fellowships, within the scope of Research and Development (R&D) Projects, Infrastructure Projects, Multiannual Financing Programs for R&D Units and other financing instruments, published by the FCT on June 2nd and which came into force on June 7th 2021.

Article 2

(Duration)

1. The total duration of the fellowships awarded by the IGC, including renewals thereof, cannot exceed the period provided for in the present Regulation for each type of fellowship.
2. Without prejudice to the provisions of the previous number, the total duration of the fellowships awarded within the scope of research projects, including renewal periods, cannot exceed the period of execution of the respective project.

Article 3

(Fellowships typology)

The IGC awards the following types of Research and Development (R&D) Fellowships:

1. Research Initiation Fellowship (henceforth “BII”)
2. Research Fellowship (henceforth “BI”)
3. Post-Doctoral Research Fellowship (henceforth “BI-PD”)

Recipients of the referred fellowships are:

1. Research Initiation Fellowships (BIIs)

- a) This type of fellowship is intended for the carrying out of initial R&D activities by students enrolled in a higher professional technical course, a university degree, an integrated master's or a master's degree, aiming at initiating their scientific training through integration in R&D projects to be developed in association or cooperation with the IGC.
- b) The fellowships referred to in the present article may also be used to carry out initial R&D activities by graduates who are enrolled in non-academic training courses, integrated in educational projects of a higher education institution, developed in association or cooperation with the IGC.
- c) BIIs have a minimum duration of three months, and may be renewed up to a maximum period of one year.

- d)* BIIs can only be awarded to those who do not exceed, with the conclusion of the fellowship contract in question, including possible renewals, consecutive or interpolated, an accumulated period of one year in that type of grant.
- e)* BIIs cannot be awarded to anyone who has already benefited from research fellowships directly or indirectly financed by the FCT, awarded under the terms of the Research Grant Holder Statute.

2. Research Fellowships (BIs)

This type of fellowship is intended for students enrolled in a master's or doctoral program to consolidate their scientific training, through the development of research work integrated in R&D projects, leading to the award of the respective academic degree. Research fellowships may also be used to carry out R&D activities by graduates or masters who are enrolled in non-academic courses integrated into educational projects of a higher education institution, developed in association or cooperation with the IGC.

A BI has, by default, the duration of one year, cannot be granted for periods of less than three consecutive months, and may be renewed for additional periods of time until they reach:

- a)* One year, when the fellowship has been awarded to graduates or masters who are enrolled in non-academic courses;
- b)* Two years, when the fellowship has been awarded to a student enrolled in a master's program;
- c)* Four years, when the fellowship has been awarded to a student enrolled in a PhD program/project.

3. Post-Doctoral Research Fellowships (BI-PDs)

This type of fellowship is intended for PhD holders whose academic degree has been obtained less than three years prior the development of advanced research work. These fellowships can be awarded provided that the following conditions are cumulatively met:

- a)* The post-doctoral research is carried out in a host entity different from the entity where the research work that led to the award of the doctoral degree was carried out;

- b) Research activities do not require post-doctoral experience;
- c) The research activities have a period of development and execution equal to or less than three years;
- d) The postdoctoral researcher does not exceed, with the celebration of the fellowship contract in question, an accumulated period of three years, consecutive or interpolated, as a BI-PD fellowship holder;
- e) For the purposes of the provisions of paragraph a) above, it is considered that the entity hosting the fellowship holder is different from that where the research work leading to the award of the PhD degree was carried out, namely:
 - i. Different higher education institutions;
 - ii. Different organic units in the same higher education institution;
- f) A BI-PD has, by default, the duration of one year and cannot be granted for periods of less than three consecutive months, and may be renewed for up to a maximum period of three years;
 - i. Once the contract relating to a BI-PD expires, a new fellowship contract cannot be celebrated between the same host entity and the same fellowship holder.

Article 4

(Fellowship holder status)

1. The award of a fellowship under the terms of the present Regulations grants the respective beneficiary the status of IGC research fellowship holder.
2. The award of the research fellowship holder status, provided for under Law n° 40/2004, of August 18th and amendments thereto, results from the celebration of the fellowship contract, and therefore begins on that date.

Article 5

(Cumulative fellowships)

Fellowship holders cannot benefit, at the same time, from any other fellowship, except when explicitly agreed between the funding entities.

Article 6

(Exclusivity)

The roles and responsibilities of a fellowship holder are performed on an exclusivity basis, under the terms established in the [Research Grant Holder Statute](#) Article 5, points 3 and 4.

Article 7

(Employment relationship)

The fellowship contract does not entitle, does not generate subordinate work relationships, and does not represent a service agreement.

CHAPTER II

APPLICATIONS AND SELECTION OF CANDIDATES

Article 8

(Fellowship calls)

1. As a rule, calls are open for one or more fellowship typology covered by these Regulations.
2. Fellowship calls must indicate:
 - a) A description of the type, purpose, object and duration of the fellowship, including the objectives to be achieved by the candidate;
 - b) The financial components, frequency and payment method of the fellowship;
 - c) The fellowship recipient categories;
 - d) The model of the fellowship contract, the final reports to be prepared by the fellowship holder and the scientific advisor, and the respective evaluation criteria;
 - e) The terms and conditions of fellowship renewal, if any;
 - f) The rules applicable regarding information and publicity of the fellowship granted.

Article 9

(Eligibility)

1. Foreign and national citizens can apply for fellowship at the IGC.

2. Candidates who intend to apply for the fellowship positions published in accordance with the fellowship typology set forth under Article 3 hereinabove must submit their application as defined in the respective call.

Article 10

(Documents and selection)

1. The application must be accompanied by all the documents required by the fellowship call.
2. The fellowship call shall set forth the selection criteria.

Article 11

(Decision)

1. Decisions on awarding or declining an application shall be communicated in writing to all applicants within 30 working days after the deadline for submitting the application.
2. Applicants may lodge a complaint against the decision referred to in the previous point within 10 working days after the date of the decision.

CHAPTER III

AWARD AND RENEWAL OF GRANTS

Article 12

(Fellowship contract)

The award of a fellowship comes into place through the attribution of a subsidy indicated in Annex I hereof, under the conditions set out in these Regulations and in the contract to be celebrated between the FCG and the fellowship holder, in which the rights and obligations of both parties are established.

Article 13

(Final fellowship report)

The fellowship holder must submit, within sixty days after the conclusion of said fellowship, a final report of their activities, validated by the project supervisor.

Article 14

(Fellowship holder's assistance)

The IGC Human Resources Secretariat, responsible for providing all information regarding its Statute, is available on weekdays from 9 am to 1 pm and from 2 pm to 5 pm or via email, at the e-mail address peoplemanagement@igc.gulbenkian.pt. Further information is available under: <https://gulbenkian.pt/ciencia/pt-pt/homepage/igc/organizacao/direcao/equipa/>.

Article 15

(Fellowship renewal)

1. The request for renewal of the fellowship, up to the maximum limit of its duration, must be submitted up to 60 days before the end of the term of validity of the current contract, accompanied by a report of the work carried out, a plan of future work, accompanied by a justification provided by the supervisor.
2. The renewal of the fellowship will be formally established by a written document, drafted by the FCG and celebrated by both parties in addition to the research fellowship agreement.

CHAPTER IV

AMOUNT AND PERIODICITY OF FELLOWSHIP PAYMENT

Article 16

(Fellowship values and subsidies)

The table with the fellowship's values, top-ups thereto fully supported by the FCG-IGC and subsidies to be awarded by fellowship typology shall be fixed annually by the FCG-IGC, having as a reference the values published annually by FCT, according to Annex I hereto.

Article 17

(Fellowship payment method)

1. Fellowships are paid until the end of each month by bank transfer to the IBAN of the fellowship holder.
2. With the payment, a document demonstrating the settlement of the value of the fellowship shall be delivered to the fellowship holder.

CHAPTER V

RIGHTS OF FELLOWSHIP HOLDERS

Article 18

(Rights of fellowship holders)

1. All grant holders are entitled:
 - a) To punctually collect the funding that they are entitled to by virtue of the awarding of the grant;
 - b) To obtain the necessary technical and logistical support from the IGC to carry out their work plan;
 - c) To benefit, if they so request, from the social security regime, in the terms of the provisions in article 10 of the Decree-law no. 40/2004, from the 18th of August;
 - d) To benefit from personal accident insurance with Companhia Fidelidade (policy number AG50000512), whose particular conditions guarantee € 25,000 in the event of death or permanent disability, € 2,500 for treatment expenses and € 2,500 for funeral expenses due to accident during the performance of the grant activity;
 - e) To suspend activities financed by the fellowship for reasons of parenting, adoption, childcare and family assistance under the conditions and for the periods established in the general law applicable to Public Administration workers;
 - f) The fellowship holder may continue to receive the entirety of their fellowship during the suspension of activities due to parenting, as long as they do not request a subsidy from the Social Security or another welfare institution which scheme they might benefit from;
 - g) To suspend the activities financed by the fellowship due to the fellow's illness, as proven by a medical certificate or declaration of illness issued by a hospital;

- h) To benefit from a rest period that does not exceed 22 working days per calendar year, in a period agreed with fellow's supervisor or institutional host;
 - i) To all other rights arising under applicable law or the research fellowship agreement.

- 2. The suspension referred to in paragraphs f) and g) of the previous number shall be carried out without prejudice to the maintenance of the fellowship payment for the corresponding period, restarting the counting of the first working day of the fellowship holder's activity after interruption.

- 3. Food, holiday, Christmas or other subsidies not expressly provided for in these Regulations or in the fellowship contract shall not be due under any circumstances.

CHAPTER VI

DUTIES OF FELLOWSHIP HOLDERS

Article 19

(Duties of fellowship holders)

The duties of research fellows are:

- a) To punctually fulfil all obligations resulting from the respective work plan;
- b) To not change the objectives listed in the work plan without the consent of the supervisor and/or Director of the IGC;
- c) To not interrupt the internship without prior authorization from the supervisor and/or Director of the IGC;
- d) To not leave the IGC without prior authorization from the supervisor and/or Director of the IGC, except for normal absences on weekends, holidays or vacation periods that do not affect the pace of work;
- e) To comply with the IGC's internal operating rules, namely its Code of Conduct for Researchers;
- f) To prepare the reports required by the fellow's work plan;
- g) To communicate to the fellow's supervisor and the Director of the IGC the occurrence of any fact that justifies the suspension of the fellowship;
- h) To cooperate with the competent entities which accompany the fellowship holder, facilitating their activity and promptly responding to all requests made within the scope of this monitoring;

- i) To observe the ethics, health and safety rules applicable in the scope of their research work, namely those relating to the handling of experimental model organisms, bio-hazardous material and chemical products or radioactive elements;
- j) To keep confidential matters, information, elements or data related to the organization and activities of the IGC that may harm interests of the FCG, its image or reputation;
- k) To not remove or allow the removal of any biological material from the laboratory or IGC facilities without written authorization from the Director of the IGC;
- l) To fulfil the obligations arising from the applicable law, these Regulations and the fellowship contract.

Article 20

(Change of work plan or supervisor)

1. The fellowship holder may change the objectives listed in the proposed work plan with the consent of the supervisor and the IGC.
2. Change of contractual duration or of supervisor is only possible under exceptional circumstances, duly justified by all parties involved.
3. The change referred to in the previous number is requested by the fellow to the IGC, prior to its occurrence, accompanied by a justified statement from the other intervening parties.

Article 21

(Mention of support)

When applicable, in all works carried out by the fellowship holder, mention must be made of the fellow being financially supported by the IGC, FCT or community funds.

CHAPTER VII

END, SUSPENSION AND CANCELLATION OF THE FELLOWSHIP

Article 22

(Final report)

As provided under the terms of the fellowship, the fellow shall present a duly detailed final report or a copy of the thesis, in the case of the project leading to the award of an academic degree.

Article 23

(Cancellation of the fellowship)

1. The fellowship may be cancelled by reasoned decision of the Director of the IGC whenever the fellow's duties, set forth under the applicable law, these Regulations or the fellowship contract are not fulfilled.
2. Independent of any criminal liability applicable to the case, false representations by the fellowship holder on matters relevant to the award thereof or to the assessment of its development shall also determine the cancellation of the fellowship.
3. The fellow whose fellowship is cancelled due to a serious violation of their duties may be obliged to refund the sums they have received.

Article 24

(End of work)

1. Payment shall no longer be due after the end of the work, shall the objectives of the fellowship be attained before the initially foreseen deadline.
2. Amounts subsequently received by the fellow shall be refunded within a maximum period of 30 days from their receipt.

CHAPTER VIII

FINAL PROVISIONS

Article 25

(Amendments to these Regulations)

1. These Regulations shall be amended or revised whenever the Board of Directors of the FCG so determines, but said amendments or revisions will only come into force after proper approval by FCT.

2. The amendment to these Regulations for Scientific Research Fellowships of the IGC was carried out following the entry into force of the Decree-law no. 123/2019, from August 28th.

Article 26

(Coming into force)

1. These Regulations, with the respective amendments referred to in paragraph 2 of the previous article, shall come into force on the business day following their approval by the FCT, applying to all fellowships which launch are published from that date onwards.
2. For fellowships which start date have been published before the new version of the Regulations came into force, the previous version of these Regulations shall apply, including the renewals thereto.

CHAPTER IX

INTERPRETATION AND INTEGRATION OF LOOPHOLES

Article 27

(Doubts and disputes)

1. It is up to the Board of Directors of the FCG to establish the authentic meaning of the provisions of these Regulations that give rise to doubts in their application.
2. Omissions shall be solved by deliberation of the Board of Directors of the FCG, taking into account the principles and rules of the legal status of the scientific research fellowship holder as per Decree-Law 123/19 of August 28th.

ANNEXES

Annex I — Fellowship values

Annex II — Final report model to be prepared by the fellow (Portuguese and English version)

Annex III — Final report model to be prepared by the supervisor with the respective evaluation criteria (Portuguese and English version)

Annex IV — Fellowship contract model

Anexo I

Valores de Bolsas

(Revisão Outubro 2021)

| <i>Valores em EUR</i> | <u>Valores Mensais das Bolsas</u> (*) | <u>Majoração Mensal da Bolsa</u> (**) | <u>TOTAL</u> |
|--|--|--|--------------|
| Bolsa de Iniciação à Investigação (BII) | 446,12 | 153,88 | 600,00 |
| Bolsa de Investigação (BI) | | | |
| Licenciado ou estudante Mestrado | 835,98 | | 835,98 |
| Mestre | 1.104,64 | | 1.104,64 |
| Estudante Doutoramento | 1.104,64 | 145,36 | 1.250,00 |
| Bolsas de Investigação de Pós-Doutoramento (BI-PD) | 1.646,00 | 254,00 | 1.900,00 |
| Subsidio único de viagem (al. a), nº6, artº18, Reg. 950/2019) | | | 300,00 |
| Subsidio único de instalação (al. b), nº6, artº18, Reg. 950/2019) | | | 1.000,00 |

(*) de acordo com a tabela anual a publicar pela FCT

(**) Valores a cargo da FCG - IGC