

## **RULES AND REGULATIONS FOR PhD TUITION FEES (3<sup>RD</sup> STUDY CYCLE)**

Rules and Regulations approved by the Dean's Office of ISEG - Lisbon School of Economics and Management on 2022-09-08

RULES AND REGULATIONS FOR PhD TUITION FEES

Under the terms established by Decree Law No. 37/2003, of the 22<sup>nd</sup> August (the Law that defines the financing of Higher Education), altered by Law No. 49/2005, of the 30<sup>th</sup> of August, the Dean of ISEG - Lisbon School of Economics and Management (“ISEG” or “School”) approves the Rules and Regulations of PhD Tuition Fees (3<sup>rd</sup> Study Cycle) of this School under Article 140(3) of Law No. 62/2007, of the 10<sup>th</sup> September regarding the legal framework for Higher Education Institutions, and the ruling of Article 22, 2(b) of ISEG’s statutes, published in the 2<sup>nd</sup> Series of the *Diário da República* Official Gazette, on the 18<sup>th</sup> January, 2022, as an appendix of Deliberation No. 746/2022 of the Rector’s Office of Universidade de Lisboa, dated the 6<sup>th</sup> January, 2022.

### **Article 1**

#### **(Inherent rights regarding the payment of Tuition Fees)**

1. Registration confers the status of an ISEG student and the right to enrolment in a PhD at this School.
2. Enrolment in PhD degrees taught at ISEG confers the right of the student to:
  - a) Attend lectures and other university activities related to the course units for which they are duly enrolled;
  - b) Have their knowledge assessed of the subjects taught and summarised in the course units referred to in a) above;
  - c) Use the Library, the Computer Labs, the Study Rooms and other ISEG teaching support facilities, whilst adhering to the respective rules and regulations of use.
3. Any student who, in a given Academic Year, does not conclude their enrolment via the respective Portal, namely by failing to submit all the necessary documentation or by omitting to fully complete their enrolment or to pay their respective tuition fees, shall cease to benefit from student status.
4. Any student who annuls their enrolment for a PhD degree taught at this School, within the deadlines stipulated by Law, will lose ISEG student status.

### **Article 2**

#### **(Tuition Fees)**

1. Tuition fees represent the annual attendance fee due by enrolling in a degree-conferring study cycles or in single course units.
2. Enrolled students are obliged by law to pay tuition fees, without prejudice to other applicable additional charges and fees, namely those referred to in ISEG’s Fees Table.
3. Payment of tuition fees is obligatory for all students, without prejudice to the granting of school social support, especially the award of scholarships, merit awards, or others.
4. Students enrolled in a PhD study cycle are required to pay tuition fees up until the completion of their PhD dissertation, or other supervised autonomous work or equivalent work, safeguarding the special situations foreseen in these Rules and Regulations.
5. Tuition fees are always annual and refer to the respective Academic Year, and are independent of the number of course units/ECTS that the student is enrolled in (except in

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cases cited in the Appendix to these Tuition Fees Rules and Regulations) and of the number of credited ECTS. If the PhD is suspended by the School, then the student has the right to a refund of the application fee and any tuition fees already paid.

6. The value of tuition fees is set every year by the Governing Body of Universidade de Lisboa (ULisboa), based on the Rector's proposal, under the terms of Article 19, 2(h) of ULisboa's statutes.

### **Article 3 (Deadlines and Payment Plans)**

1. For each Academic Year, tuition fees are paid as follows:
  - i. An initial payment (1<sup>st</sup> Instalment) upon registration, the dates and amounts of which are set for each Academic Year by the Dean of ISEG, which are outlined in the Appendix to these Rules and Regulations, this amount being deducted later from the total value of the tuition fees, and;
  - ii. A subsequent payment, on enrolment, whereby the student pays the remaining amount. This payment may be made in partial payments (instalments), the frequency and amounts of which are set for each Academic Year by the Dean of ISEG, which are outlined in the Appendix to these Rules and Regulations.
2. Whenever the enrolment is carried out after the respective deadline for the payment of one or more of the instalments under the terms of the Appendix referred to in the previous paragraph, the student must immediately pay any outstanding instalments, as well as a late-enrolment charge, if applicable.
3. Notwithstanding the provisions of Paragraph 1(ii), upon justified request, a specific tuition fee payment may be agreed, adapted to the student's specific needs, subject to the following conditions:
  - a) The student must submit their specific request for a payment plan before the deadline for the payment of each instalment, in writing, to the Dean of ISEG, on the understanding that such a request is conditional upon due proof and assessment of the alleged financial difficulties, as well as an analysis of the history of past tuition fee payments and financial support obtained by the student;
  - b) The specific payment plan cannot go beyond the end of the Academic Year;
  - c) Specific payment plans will not be authorised for students who failed to comply with previous plans.

### **Article 4 (Methods of Payment)**

1. Tuition fees may be paid at an ATM – *Multibanco (MB)* or equivalent process (Homebanking/Internet), using the respective bank transfer references which are available on the Student Portal.

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2. Exceptionally, payment may be made at the *Multibanco* terminal at the Masters and PhD Office, if it is impossible to do so via the means referred to in the previous paragraph.
3. The student should keep the *Multibanco* receipt or the Homebanking/Internet payment proof as proof-of-payment.
4. Payment of tuition fees is the individual responsibility of each student, and thus, the use of incorrect data during payment renders such payment invalid, resulting in the student being responsible for proving the payment of the amount in question.

### **Article 5 (Invoices and Receipts)**

1. Invoices for tuition fees and charges are emitted electronically, and the student may consult the amounts to be paid, as well as obtain receipts for payments made and other financial documents via the respective Portal.
2. All invoices and receipts are issued in the name of the student, taking into account the fiscal data provided by the student on their respective Portal.
3. The student is responsible for correctly introducing their tax number/NIF and other documents which have been requested.
4. Should a student require that their respective invoices and receipts be issued in the name of another entity, they should submit their request by e-mail to the Masters and PhD Office before making any payment, before the end of the deadline for the payment of each instalment, otherwise they may not receive a favourable decision. This e-mail must clearly justify the request and should indicate the details of the entity in whose name the receipts should be passed (NIF/NIPC tax number, full name/entity, and address/head office and postal code).
5. With respect to cases referred to in the previous paragraph, payment should only be made on confirmation of the student's request by the Administrative Services.
6. Receipts for any type of payment may be obtained via the Student Portal.
7. Alterations cannot be made after the emission of an invoice and receipt.

### **Article 6 (Late payments)**

1. In the case of payment after the deadlines stipulated in Article 3 of these Rules and Regulations, the following additional charges will be applied:
  - a) Interest, at the official rate charged for debts to the State and other public entities (according to Article 29(b) of Law No. 37/2003, of the 22<sup>nd</sup> August);
  - b) An administration fee, in accordance to the amount set in the Appendix of these Rules and Regulations).
2. The interest referred to in the previous paragraph is due on the day immediately following the deadline for payment of the outstanding instalment.
3. The payment of instalments is due in their respective order, and it is not possible to pay the last instalment, without having fully settled all overdue previous instalments.
4. *Multibanco* references for payments deemed as being late under the terms of Article 3 of

these Rules and Regulations must be obtained from the Student Portal by the student.

**Article 7**  
**(Consequences of the non-payment of tuition fees)**

1. Non-payment of tuition fees is considered to be when payment is not made at the time of enrolment, or when failing to meet the deadline for any instalment payment, in accordance with Article 3 of these Rules and Regulations.
2. Under the terms of Article 29 of Law No. 37/2003 of the 22<sup>nd</sup> August, non-payment of tuition fees implies the following:
  - a) The annulment of all academic acts carried out during the academic year for which the lack of payment applies;
  - b) The annulment of the annual registration and enrolment.
3. Non-payment of tuition fees further implies:
  - a) A ban on the emission of any diploma, conclusion certificate, or any other similar document related to the academic curriculum of the student for the Academic Year in which payments are outstanding;
  - b) A ban on the student enrolling for any exams, or any other assessment activities contemplated in the academic timetable;
  - c) A ban on being able to register and/or enroll for subsequent Academic Years, unless tuition fees due from previous years are first paid in full, without prejudice to the following paragraphs.
4. It is the responsibility of the student to keep their email address updated for the purpose of receiving notifications from ISEG, under the terms of these Rules and Regulations, as well as the responsibility to keep safe all documents of proof-of-payment made.
5. In case of re-admission, the student may only carry out their registration/enrolment after all outstanding tuition fees have been fully paid.
6. Non-compliance of the payment of tuition fees results in a ban on applying/registration/enrolment for any ISEG study cycle, until all outstanding tuition fees have been fully paid, without prejudice to the following paragraphs.
7. Bearing in mind the legal framework of tuition fees, total or partial debt pardon is expressively forbidden.
8. Without prejudice to the previous paragraphs, the Dean of ISEG may establish specific fee payment plans for those students who owe outstanding payments, provided that they prove, with justification, that they are temporarily unable to pay the fees.
9. The plans referred to in the previous paragraph cannot extend beyond the subsequent Academic Year for which fees are owed.
10. The conclusion and fulfilment of the payment plan referred to in the preceding paragraphs enables the student to enrol in the Academic Year following that for which fees are owed, under certain conditions.
11. Failure to comply with the agreed plan results in the cancellation of the student's registration and enrolment for the Academic Year in question, without prejudice to the application of the

provisions of Articles 8 and 9 of these Rules and Regulations.

### **Article 8 (Notification of outstanding tuition fees)**

1. Information regarding the financial situation of each student, namely the deadlines for the payment of tuition fees, is made available on their respective Portal, under the 'Current Account' tab.
2. At the end of the Academic Year, students with outstanding dues are notified electronically of the amount due, as well as the respective additional charges and interest, and are given 15 working days to pay their outstanding dues or to negotiate a payment plan to settle the amount outstanding.
3. The notification mentioned in Paragraph 2 must alert the student to the consequences of non-payment of tuition fees, under the terms of Article 7 above.
4. Students are responsible for the updating of their details and contacts on the Student Portal, and accordingly they cannot take advantage of the fact that the notification referred to in Paragraph 2 was sent to an email address that is not currently used by the student.

### **Article 9 (Coercive payment)**

1. Non-payment of outstanding tuition fees accords ISEG the right, after due notification under the terms of Article 8(2), to request coercive payment by the Tax and Customs Authorities, through a fiscal order, as contemplated by the Tax Procedures and Process Code.
2. For the purposes of the previous paragraph, and after the deadline referred to in Article 8(2) has passed, a certificate is issued describing the outstanding dues, plus additional charges and interest calculated at the statutory rate, which is sent to the respective Tax Authorities of the debtor's address.

### **Article 10 (Voluntary annulment of registration/enrolment)**

1. A student who wishes to drop out of their PhD degree, for whatever reason, is obliged to request the annulment of their registration by completing and submitting the aforementioned request via the respective Portal. In the case of the annulment of the respective enrolment pursuant to Paragraph 7 below and the consequent annulment of their enrolment in the respective course units, any tuition fees outstanding at the date of the aforementioned annulment are due.
2. If the request referred to in the previous paragraph is not completed and submitted, then the request for annulment will not be considered.
3. Those students whose request to annul their registration is accepted in accordance with the terms defined in the previous paragraphs, need only pay the outstanding tuition fees instalments that are due at the date of annulment, as well as any additional interest charges calculated at the legal rate.

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4. Without prejudice to the provisions of Article 17, students can only be reimbursed any overpayment, as long as they expressly request this reimbursement within five working days from the date of annulment by email, which should be sent to ISEG's Academic Services. No other refunds are permitted to be made.
5. The annulment of registration as provided for in the preceding paragraphs implies the annulment of the same, with students not being permitted to enrol in future Academic Years, without prejudice to the regime provided for in Article 15 of these Rules and Regulations.
6. The student's request for the annulment of their registration only takes effect from the date on which this request is submitted to ISEG's Academic Services.
7. Those students whose request for the annulment of registration has been accepted and who have been granted a payment plan will be duly informed by ISEG's Academic Services that their respective payment plan has similarly been annulled, with the student being obliged to pay all outstanding tuition fees, if applicable, as well as any eventual additional interest charges calculated at the legal rate.

**Article 11  
(Scholarships)**

1. Students who applied for a Fundação para Ciência e a Tecnologia (FCT) scholarship should submit proof of this application on enrolment, in the form of a document or declaration under oath, whereby the situation will be made official as soon as the FCT makes a decision.
2. If the scholarship is not granted and the student decides that they wish to annul their registration as a result of this decision, then the student should request this annulment in writing within 15 calendar days from when they were officially informed by the FCT, with no obligation to pay tuition fees.
3. Any students who is not granted a scholarship is granted a period of 15 calendar days counting from when they were officially informed by the FCT to pay all tuition fees or instalments already due, without any additional charges.

**Article 12  
(Repetition of Course Units)**

1. The tuition fees for re-enrolment in course units (CUs) are calculated according to the following formula:

$$\text{Tuition fee} = \frac{\text{No. of ECTS for the CU enrolled for}}{\text{No. of ECTS for the degree's year}} \times \text{the tuition fee of the degree's year}$$

**Article 13  
(Students studying for Single Course Units)**

Those students, or other interested parties, who are studying for single course units, are subject to the payment of tuition fees and charges, whose amounts are set every year by the Dean of ISEG, which are presented in the Appendix of these Rules and Regulations.

#### **Article 14 (Interruption of studies)**

1. Those students who interrupt their studies for one or more Academic Year must re-submit their application and may require credits when they do so.
2. The tuition fee owed is calculated based on the credits accumulated from previous studies, according to the following formula:

$$\text{Tuition fee} = \frac{\text{No. of ECTS for the CU enrolled for}}{\text{No. of ECTS for the degree's year}} \times \text{the tuition fee of the degree's year}$$

#### **Article 15 (Credits)**

1. Those students who wish to request the use of credits from previous studies, must pay the charges due for course unit credits, in accordance with the ISEG Fee Table.
2. For those students who obtained credits at a university other than ISEG, the established tuition fee prevails, with no right to a discount.

#### **Article 16 (School Insurance)**

1. All students enrolled at ISEG are covered by the school insurance contracted by ISEG.
2. The student is charged the school insurance premium referred to in the preceding paragraph on enrolment.
3. Non-payment of the school insurance premium implies that the student is prohibited from completing their enrolment at ISEG, and that they are considered not to be enrolled for the purposes of these Rules and Regulations.

#### **Article 17 (Other payments)**

1. In addition to the payment of tuition fees, whenever applicable, the student is also liable for the payment of legally-set fees and charges and other amounts contemplated in the ISEG Fee Table, as approved by the Management Board, in accordance with ISEG's Statutes.
2. The application fee for each PhD is payable at the time of application, and is not refundable, except in cases of the suspension of the PhD degree by the School, and its value is set every year by the Dean of ISEG, which is presented in the Appendix of these Rules and Regulations.



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**Article 18**  
**(Other cases not covered by these Rules and Regulations)**

1. All other cases which are not specifically covered by these Rules and Regulations will be decided on in accordance with the Tuition Fees Rules and Regulations of Universidade de Lisboa, subject to any necessary adaptations.
2. Other cases not covered by any of the Rules and Regulations referred to in the previous paragraph should be presented to the Dean of ISEG, who will decide on them.

**Article 19 (Repeal norms)**

The previous approved Rules and Regulation are repealed, as are all associated deliberations.

**Article 20 (Entry into force)**

These Rules and Regulations will be in force as from the 2022/2023 Academic Year (inclusive), and the Appendix herewith attached will be reviewed annually before the start of each Academic Year, with updates of tuition fee rates, the number of instalments, and the dates and amounts, and/or other adjustments that were considered necessary to implement.

The Dean of ISEG

(Professor Clara Raposo, PhD)