

# UNLOCKING EU FUNDING

Identifying the right  
programme for you and  
conceptualising a project

[www.cascade-foundation.eu](http://www.cascade-foundation.eu)





# WHO WE ARE



- ★ We are a not-for-profit foundation committed to addressing the inequities in international education and helping institutions across the world become more globally connected
- ★ By creating a community of practitioners, we want to help organisations overcome the barriers they face and deliver transformative change.
- ★ We believe this can be achieved by combining new approaches to intercultural competence, co-creativity and social innovation.

# WHAT WE DO



- ★ Training programmes and workshops tailored to the needs of educational institutions.
- ★ Development and implementation of funded projects in teaching, exchange, research and innovation.
- ★ Design of structured curricula and frameworks that align with organisations' objectives.
- ★ Strategic support in areas such as staff empowerment, research and innovation, creating robust budgets, organisational change, and internationalization strategies.
- ★ individual coaching and mentoring services to professionals within educational organisations.

# A FEW POINTS BEFORE WE START



- ★ This webinar is devised specifically to highlight the opportunities for collaboration with international partners – i.e. outside the EU. We will focus on the Erasmus+ and Horizon Europe programmes
- ★ This session will be recorded.
- ★ Be realistic about expectations! These webinars will not offer you a “silver bullet” to success but rather offer a map to help you on your way.
- ★ Housekeeping: Please post questions into the chat and we will try to answer them as we go; there will also be a chance for questions and answers between sections.
- ★ This webinar is about defining the opportunities; the next workshop will focus more on how to put together a winning proposal.
- ★ We will contact you for feedback after the webinar.
- ★ Please feel free to contact us after the webinar although any individual support we can offer will be limited.

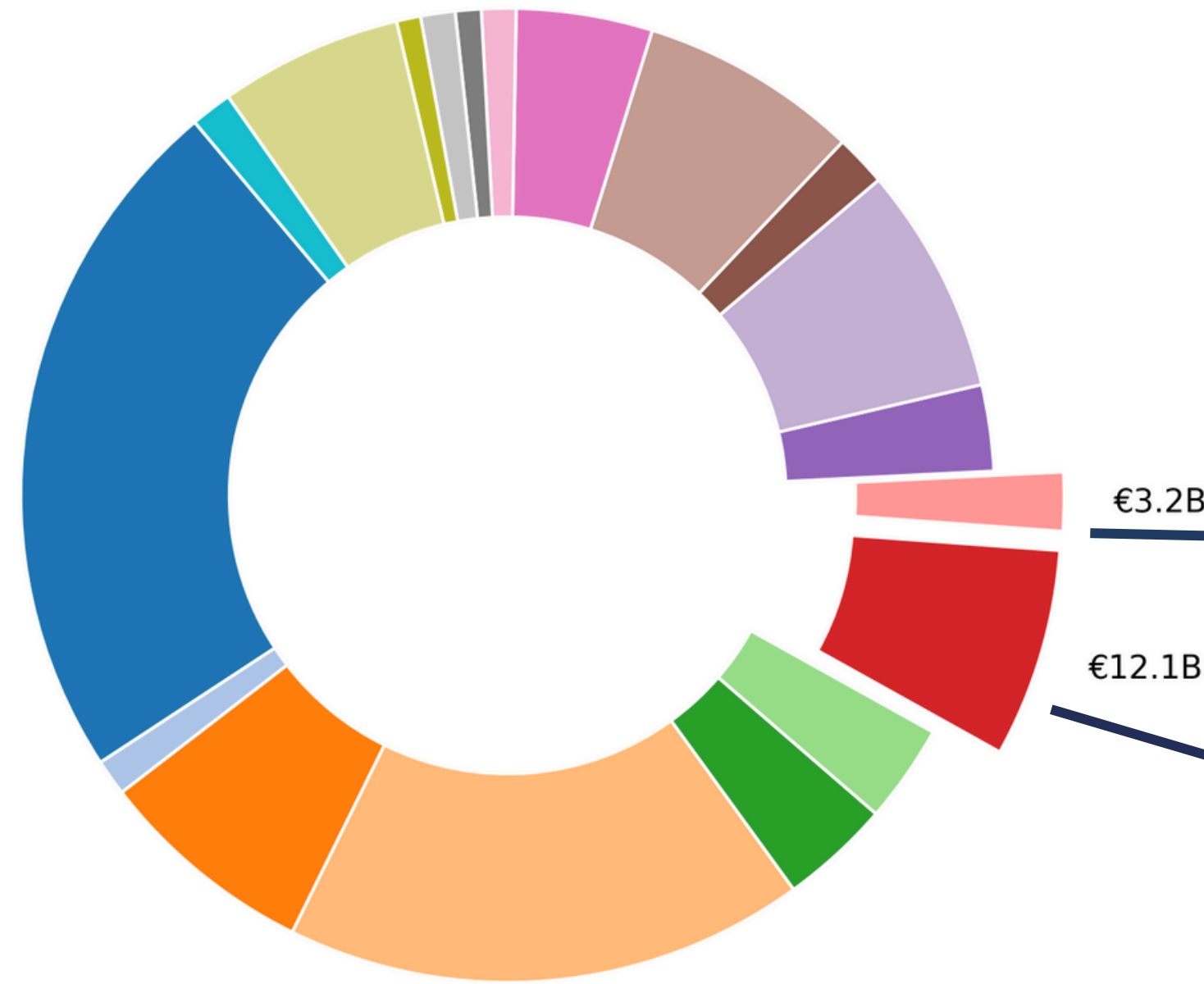




# EU BUDGET BY CATEGORY - 2022



- European Agricultural Guarantee Fund
- Other agriculture, fisheries
- European Agricultural Fund for Rural Development
- European regional Development Fund
- Cohesion Fund
- Transport, building, environment - various
- Horizon Europe
- Erasmus+
- Education and reserach - various
- European Social Fund
- Welfare - various
- Neighbourhood & International Coop
- Foreign policy and defence - various
- Finance - various
- Energy - various
- Communications
- Other
- EU Administration
- Decentralised agencies



€3.2B

€12.1B



# MAIN PROGRAMMES OPEN TO YOU



## ERASMUS+

Erasmus+ is the European programme for education, training, youth and sport. It is not only aimed at students but many audiences from various fields, both formal and informal, in the education and training sectors.




## HORIZON EUROPE

Horizon Europe is the EU's key funding programme for research and innovation. It tackles climate change, helps to achieve the UN's Sustainable Development Goals and boosts the EU's competitiveness and growth.





# EXAMPLES OF PROJECTS



European Commission | EU Funding & Tenders Portal

Sign in EN

Home Funding ▾ Procurement ▾ **Projects & results ▾** News & events ▾ Work as an expert Guidance & documents ▾ Search... Q

**Filters**

Quick search

Select... Q

Match whole words only

Programming period ▾


Programme ▾

Topic ▾

All filters

10000+ item(s) found


Title ▾ ↓

 There are more than 10000 results, please refine your search criteria.

**Mate**

101133402 | Acronym: **Check Mate** | Contributors: 2 Open

Programme: **Erasmus+ (ERASMUS+)**


 Greece

" Mate is an annual partnership of Youthorama sports club based in Greece and a newcomer in Erasmus+ Sport ""VAKIF...

**„Zöld egyetértés Európában ” KÖRNYEZETBARÁT Városok XV. Találkozója**

101053705 | Acronym: **ZOLDEU** | Contributors: 7 Ended

Programme: **Citizens, Equality, Rights and Values Programme (CERV)**

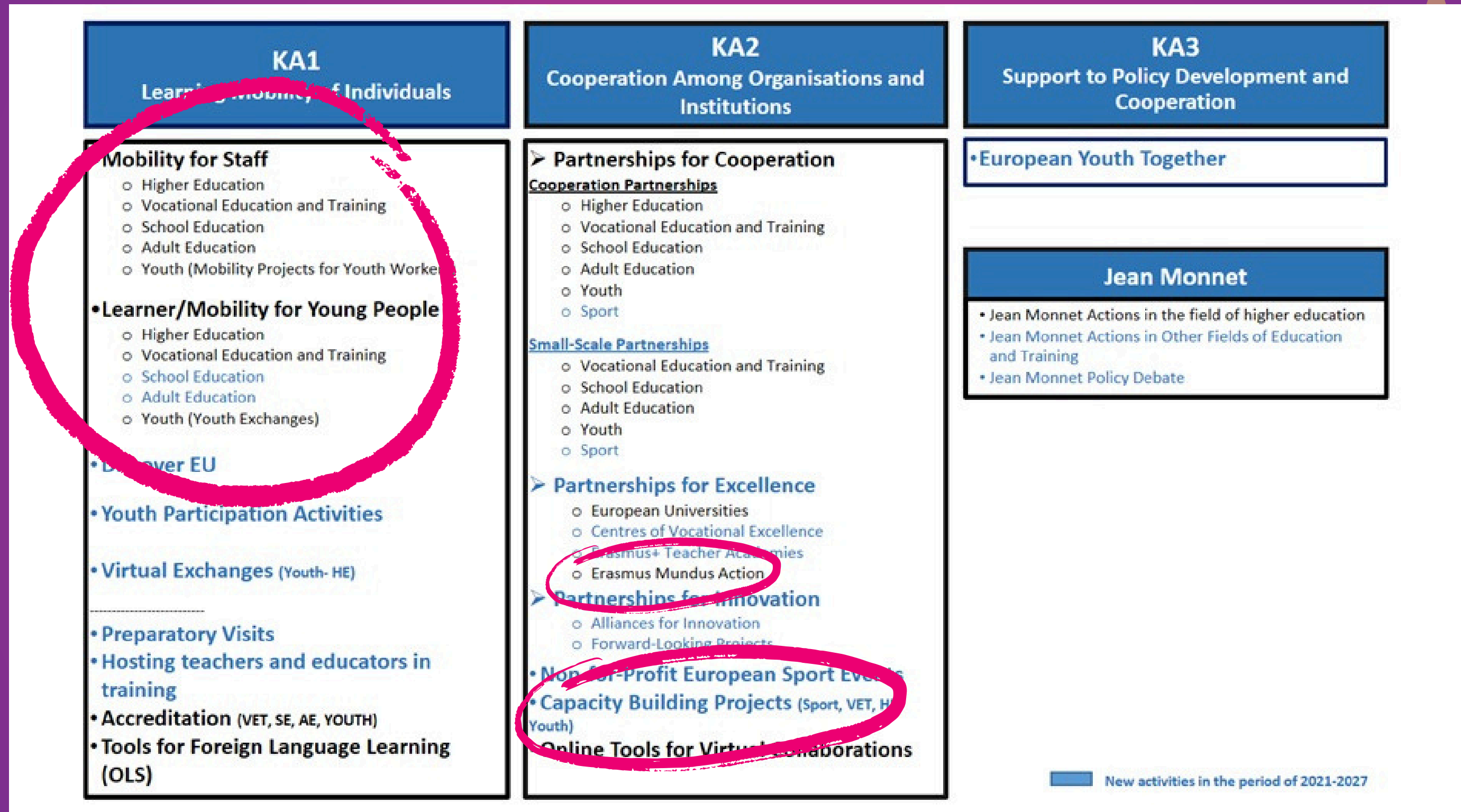
 Hungary



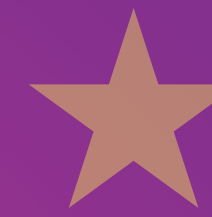
**ERASMUS+**



# ERASMUS+ STRUCTURE



# INDIVIDUAL MOBILITIES



## Asia

A minimum of 25% of the budget should be spent on mobility with the least developed countries (LDCs) of the region; No more than 25% of the budget should be spent on mobility with the High Income Countries (HICs) of the region; No more than 15% of the budget should be spent on mobility with China; No more than 10% of the budget should be spent on mobility with India.

## Pacific

No more than 86.5 % of the budget should be spent on mobility with Australia and New Zealand together.

## Sub-Saharan Africa

A minimum of 35% of the budget should be spent on mobility with the least developed countries (LDCs) of the region, with a special emphasis on migration priority countries; no more than 8% of the budget should be spent on mobility with any country.

## Latin America

No more than 30 % of the budget should be spent on mobility with Brazil and Mexico together.

## Eastern Partnership

A minimum of 40% of the budget should be allocated to students with fewer opportunities.

## Southern Neighbourhood

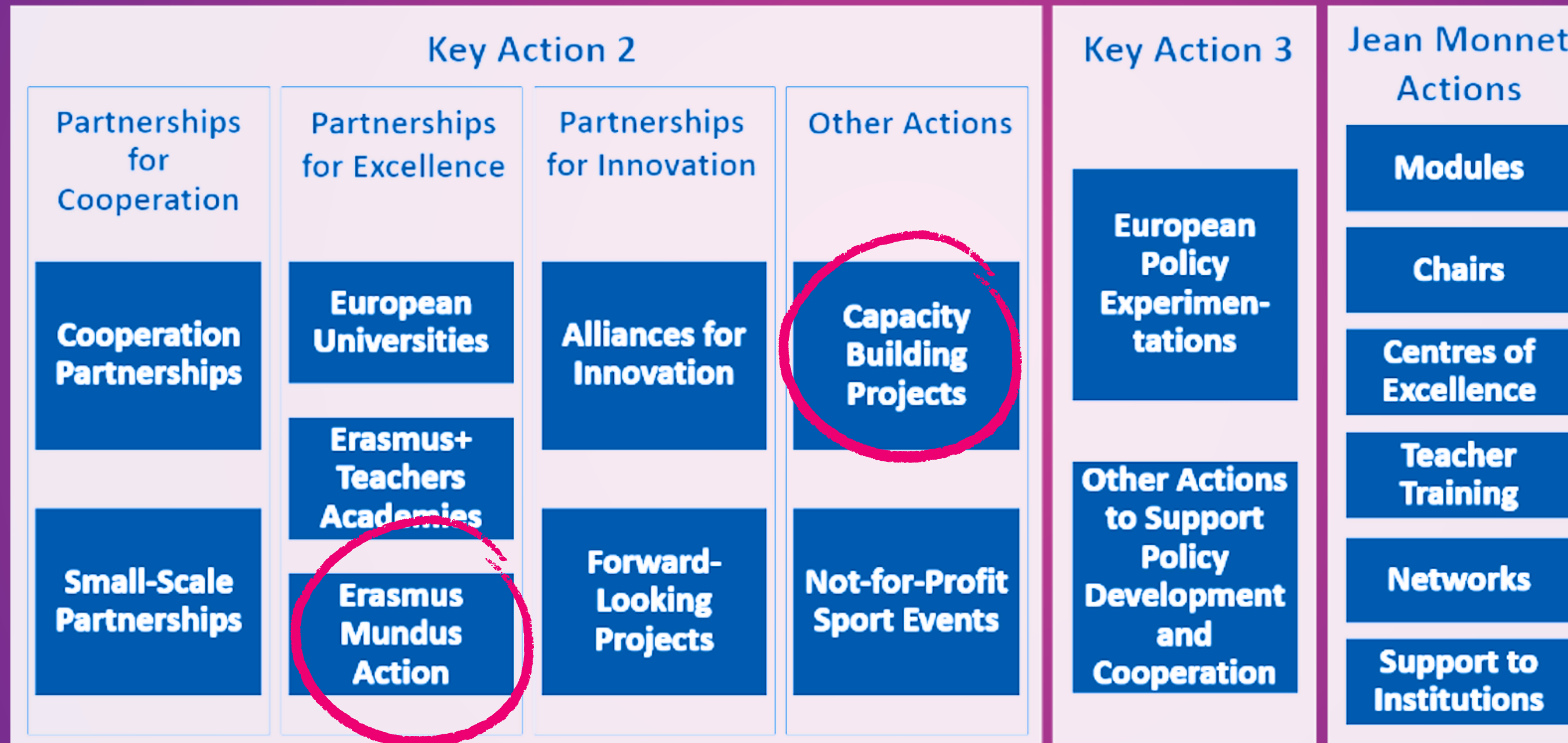
No more than 15% of the budget should be spent on mobility with any country; A minimum of 65% of the funds should be allocated to students, 50% of whom should be with fewer opportunities.

## Western Balkans

Emphasis should be on student mobility.



# KEY ACTION 2 PROJECTS





# **ERASMUS MUNDUS ACTIONS**

# ERASMUS MUNDUS JOINT MASTERS

- ★ A high-level integrated & transnational study programme at MA level
- ★ A Master programme of excellence open to all disciplines
- ★ Delivered by an international consortium of HEIs from different countries worldwide & other educational and/or non educational partners
- ★ Offering high-level scholarships to excellent students worldwide





# ERASMUS MUNDUS DESIGN MEASURES



**Erasmus Mundus Design Measures** are projects which support the design of high-level study programmes at master level, jointly delivered by an international consortium of HEIs from different countries worldwide and, where relevant, other educational and/or non-educational partners with specific expertise and interest in the concerned study areas/professional domains.

# INTERNATIONAL PARTNERSHIPS



EU Member States

+

**Third countries  
associated to the  
Programme:**

Norway, Iceland,  
Lichtenstein,  
Republic of North Macedonia,  
Republic of Serbia,  
Republic of Turkey



**Thid countries not  
associated to the  
Programme:  
All other countries  
throughout the world**



# EMJD IN A NUTSHELL...

A jointly designed fully integrated curriculum and common implementation procedures based on the Standards for Quality Assurance of Joint Programmes in the EHEA (e.g. joint selection, promotion, common services, joint administrative and financial management, etc.)

It must be delivered by a consortium of at least three HEIs from three different countries of which at least two must be EU Member States and third countries associated to the Programme

International outreach to attract and enrol excellent students worldwide (part of which may benefit from an EMJM scholarship)





# WHAT IT COVERS

- ★ Fixed Grant Agreement of 74 months independently from the length of the master
- ★ Commitment to enrol a certain number of students per project
- ★ At least 4 master editions lasting 1 to 2 academic years (60, 90 or 120 ECTS)
- ★ Start of the 1st edition no later than the academic year following the year of project selection
- ★ At least 2 study periods in 2 countries (of which at least one in an EU Member State or a third country associated to the Programme and both different from the country of residence of students)
- ★ Geographical balance of students: no more than 10% of total scholarships per project awarded to students of the same nationality (does not apply to additional scholarships for targeted regions)

# TAKING PART AS A STUDENT



- ★ Open to students worldwide
- ★ Applicants:
  - ★ must hold a first higher education degree or equivalent
  - ★ must not have benefited previously from an EMJM scholarship
- ★ The best ones can benefit from a scholarship depending on the number of scholarships available
- ★ Students apply directly to the EMJM consortium Catalogue with ongoing EMJMs offering scholarships: <https://ec.europa.eu/erasmus-mundus>

# FUNDING

	Scholarship holders	Non-scholarship holders
Scholarship part	1400 / month	NA
Institutional part	750 / month	
Special Needs	3.000 to 60.000	



## Targeted regions

Each year, additional funds are allocated to encourage students from the nine target regions:

- Western Balkans
- Southern Mediterranean
- Asia
- Central Asia
- Middle East
- Pacific
- Sub-Saharan Africa
- Latin America
- Caribbean





# **CAPCITY BUILDING FOR HIGHER EDUCATION**

# CAPACITY BUILDING PROJECTS

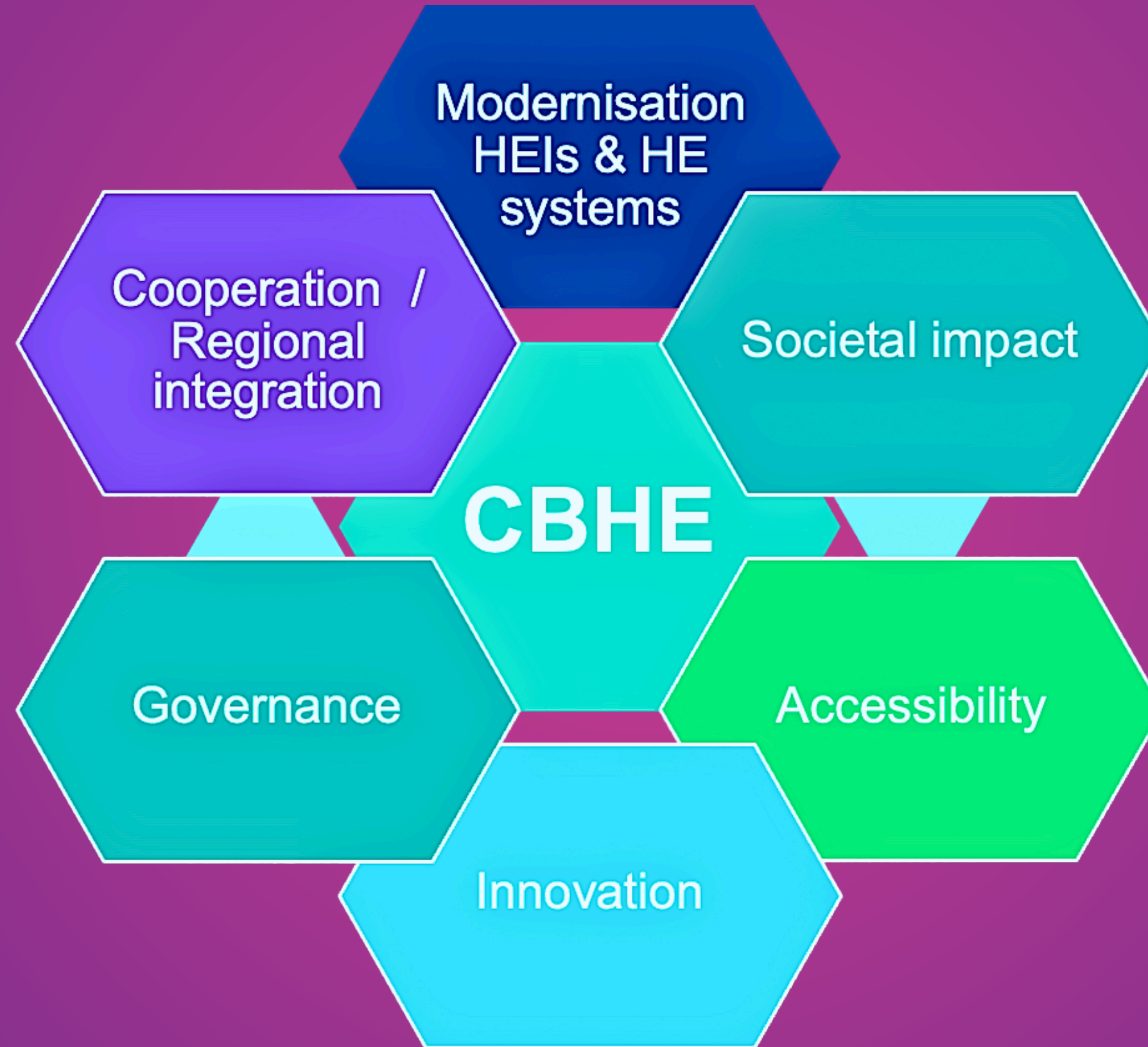


**FOCUS ON THE NEEDS** of the third countries not associated to the Erasmus+ Programme

**TARGETING THE PRIORITIES** of the third countries not associated to the Erasmus+ Programme and matching them with the EU priorities for these countries

**MAXIMISING BENEFIT** to third countries not associated to the Erasmus+ Programme

# MAIN EU OBJECTIVES OF CBHE





# THREE TYPES OF CBHE PROJECT



<b>National projects</b>	<b>Multi-country regional projects</b>	<b>Multi-country cross-regional projects</b>
HEIs from one third country not associated to the Erasmus+ Programme	HEIs from several countries not associated to the Erasmus+ Programme from one Region	HEIs from countries not associated to the Erasmus+ Programme belonging to several Regions
At least two HEIs, from 2 diff. EU countries; At least 1 HEIs, from 1 non-EU LMIC country;	At least two HEIs, from 2 diff. EU countries; At least two HEIs, from 2 diff. non-EU LMIC countries;	

THREE STRANDS...

# STRAND 1: FOSTERING ACCESS TO COOPERATION IN HIGHER EDUCATION



Facilitate access to newcomers.

First step to enhance and increase means to reach out to those with fewer opportunities.

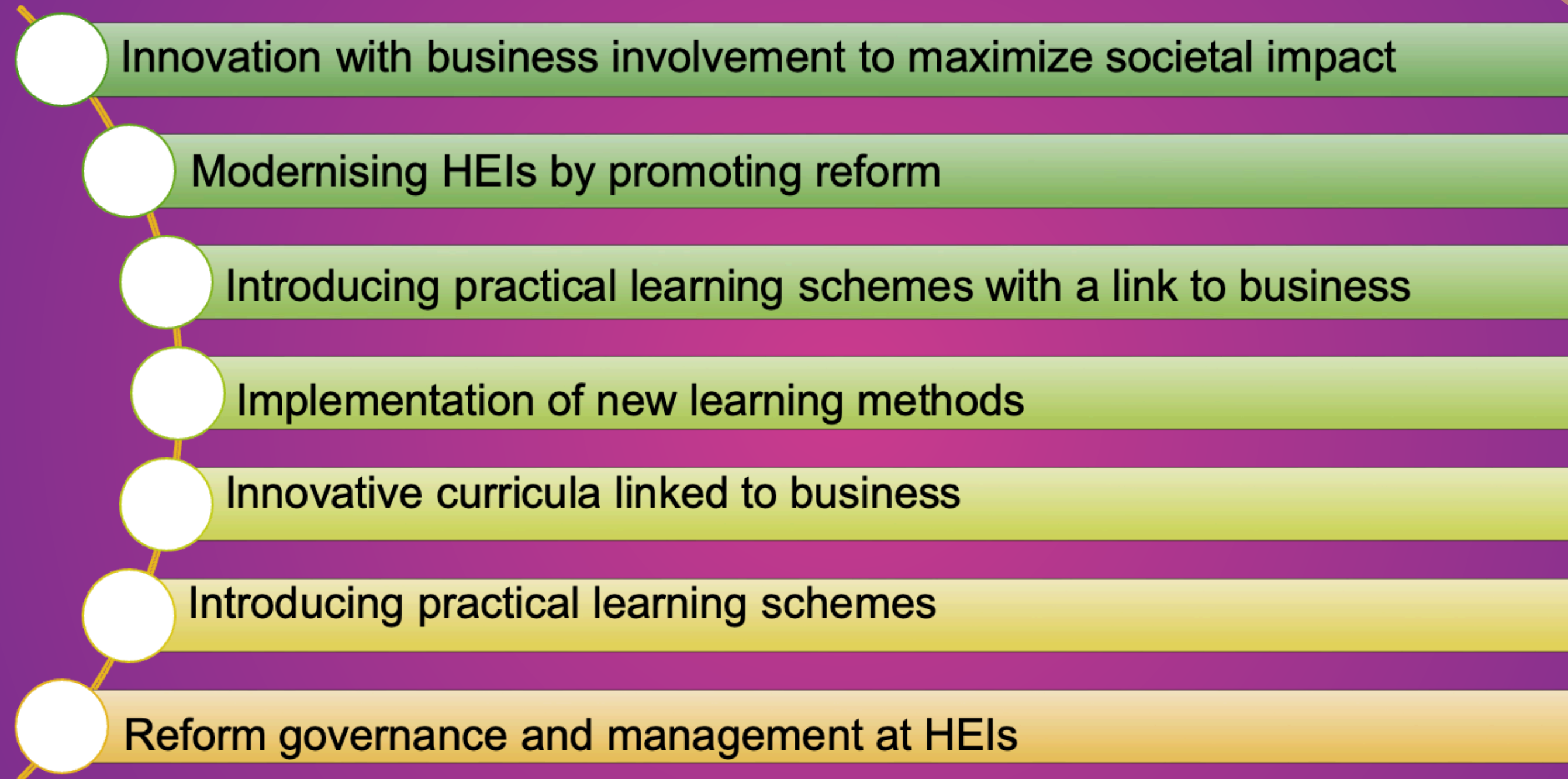
Reduce the internationalisation gap of HEIs from the same country/region

Fostering **social inclusion**

★ Projects can last 24 or 36 months

★ Funding between EUR 200.000 and EUR 400.000 per project

# STRAND 2: PARTNERSHIPS FOR TRANSFORMATION



20

- ★ Projects can last 24 or 36 months
- ★ Funding between EUR 400.000 and EUR 800.000 per project

# STRAND 3: STRUCTURAL REFORM PROJECTS



20

★ Projects can last 36 or 48 months

★ Funding between EUR 800,000 and EUR 1,000.000 per project



# OVERARCHING PRIORITIES

*(varies for different regions)*



Green deal

Digital Transformation

Migration and Mobility

Governance, peace, security and human  
development

Sustainable growth and jobs



# HORIZON EUROPE

# HORIZON EUROPE

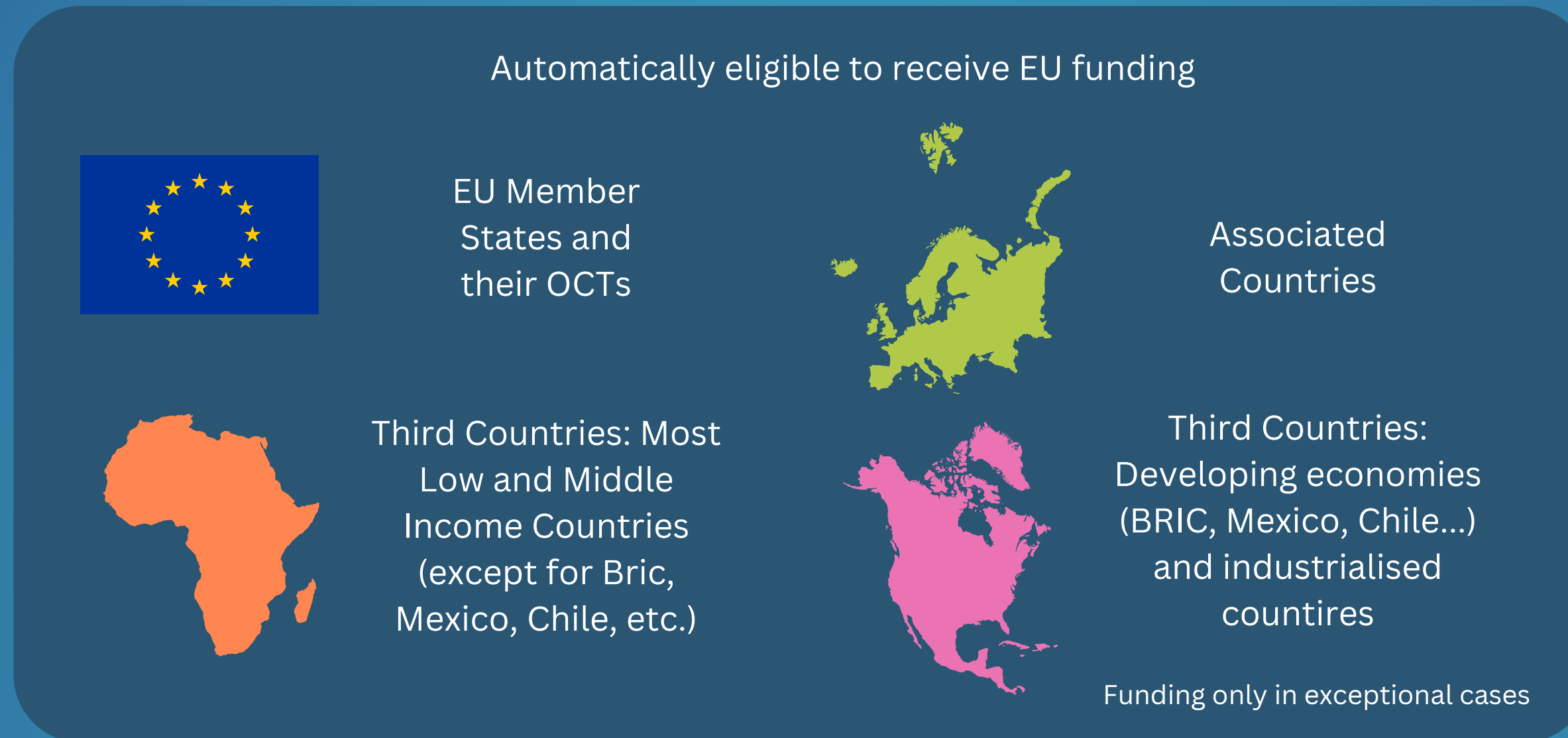
## The EU's key funding programme for research and innovation

- ★ Tackles climate change
- ★ Helps achieve the UN's Sustainable Development Goals
- ★ Boosts the EU's competitiveness and growth
- ★ Facilitates collaboration and strengthens the impact of research and innovation in developing, supporting and implementing EU policies while tackling global challenges
- ★ Supports the creation and better diffusion of excellent knowledge and technologies
- ★ Creates jobs, fully engages the EU's talent pool, boosts economic growth, promotes industrial competitiveness and optimises investment impact within a strengthened European Research Area

With a budget of more than EUR 95 billion for Horizon Europe, it is the world's largest funding program for research and innovation.



# NEW ELIGIBILITY CRITERIA FOR FUNDING



- ★ Horizon Europe **is open to legal entities from across the world**, allowing participation from non-EU and non-associated countries.
- ★ **Automatic Funding Eligibility:** Participants from specific low and middle-income countries listed in the Horizon Europe guide are automatically eligible for funding. This list includes countries from regions across Africa, Asia, and Latin America.
- ★ **Co-Funding Mechanisms:** Certain countries have set up co-funding mechanisms to support their participants in Horizon Europe projects. This arrangement can facilitate smoother participation for entities from non-EU countries that are not automatically eligible for funding



# INTERNATIONAL COOPERATION



- ★ **Focus Area:** Horizon Europe identifies priority areas where international collaboration is crucial, including climate change, health, and digital transformation. Participants can leverage these focus areas to align their projects with global challenges, increasing the relevance of their proposal
- ★ **Strategic Use of Expertise:** Non-EU entities can join projects where their specific expertise, access to unique environments, or data sets are critical to the success of the research, thus increasing their chances of being part of a funded project even if not directly eligible for EU funding
- ★ **Cross-border Collaboration:** Horizon Europe encourages projects that require or benefit from international cooperation. For participants from non-EU countries, this offers an opportunity to collaborate with European institutions, share expertise, and access cutting-edge research
- ★ **Access to Research and Innovation Networks:** Engaging in Horizon Europe projects provides international participants with valuable access to European research networks, promoting knowledge exchange and capacity building

# INTERNATIONAL COOPERATION- ASSOCIATION TO HORIZON EUROPE



## Categories of third countries

- ★ EFTA members that are members of European Economic Area
- ★ Acceding, candidates and potential candidates
- ★ European Neighbourhood Policy countries
- ★ Third countries (i) with good STI capacity; (ii) with commitment to a rules-based open market economy, including fair and equitable dealing with IPR, respect of human rights, backed by democratic institutions; (iii) that promote policies to improve the economic and social well-being of citizen

# HORIZON EUROPE IN A NUTSHELL



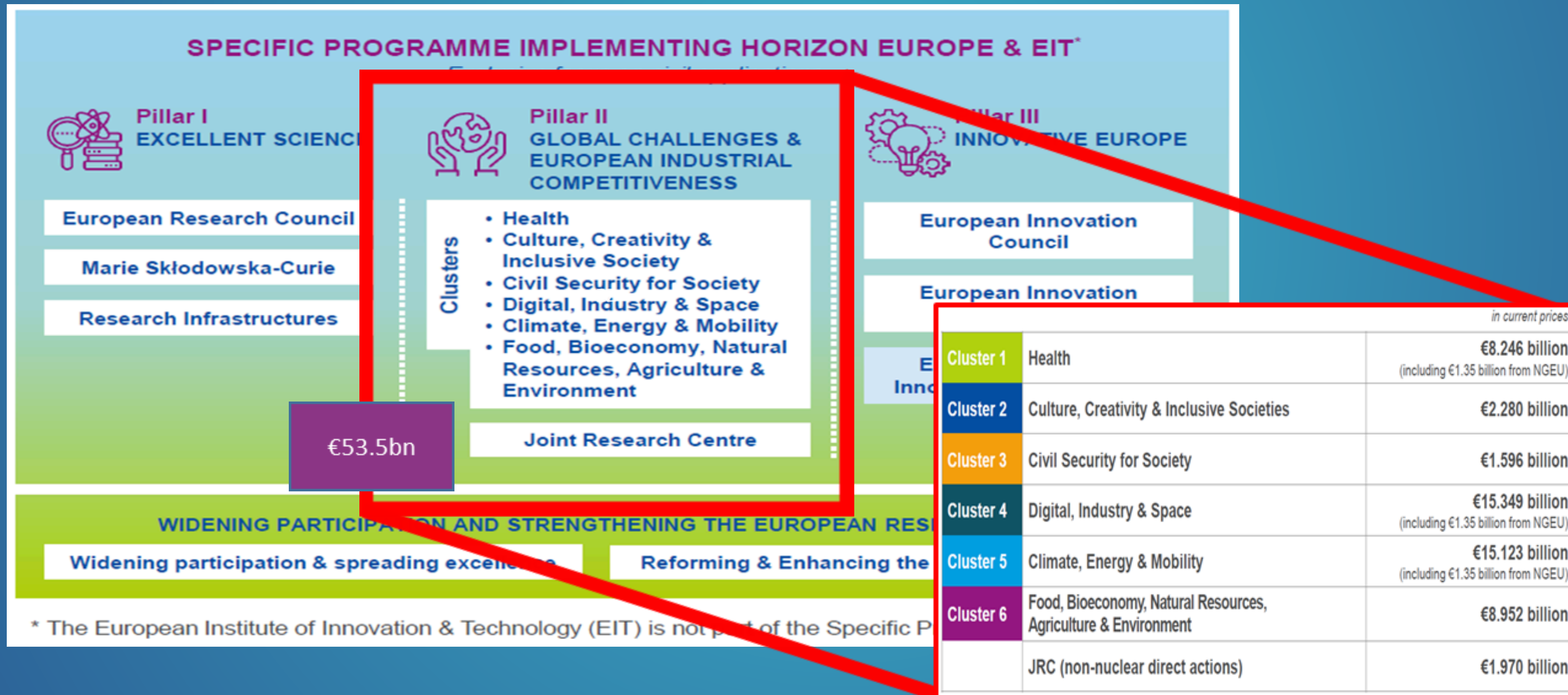




# **GLOBAL CHALLENGES THEMATIC CLUSTERS**



# PROGRAMMES RELEVANT FOR YOU. PILLAR II- GLOBAL CHALLENGES AND EUROPEAN INDUSTRIAL COMPETITIVENESS



# BUT ALSO MISSIONS

## EU Missions are a novelty of Horizon Europe

EU Missions are a coordinated effort by the Commission to pool the necessary resources in terms of funding programmes, policies and regulations, as well as other activities. They also aim to mobilise and activate public and private actors, such as EU Member States, regional and local authorities, research institutes, farmers and land managers, entrepreneurs and investors to create real and lasting impact. Missions will engage with citizens to boost societal uptake of new solutions and approaches



**Adaptation to  
climate change,  
including societal  
transformation**



**Cancer**



**Healthy oceans,  
seas, coastal &  
inland waters**



**Climate-neutral  
& smart cities**



**Soil health &  
food**



# THE HORIZON EUROPE STRATEGIC PLAN FOR 2025–2027 INTERNATIONAL COOPERATION

In combination with relevant EU policies, R&I cooperation actions with priority countries and regions will continue to help deliver the EU's external policy objectives.

These actions will include current Horizon Europe initiatives such as:

- ★ the Africa Initiative (based on the African Union–European Union Innovation Agenda);
- ★ the Mediterranean Initiative;
- ★ a new EU–Latin American and Caribbean Initiative;
- ★ the Partnership for Research and Innovation in the Mediterranean Area (PRIMA);
- ★ activities to support the Ukrainian R&I ecosystem in line with evolving needs
- ★ joint research activities to support the implementation of the EU–India Trade and Technology Council.

Topics contributing to these initiatives will encourage the participation of entities from the regions identified.



# AFRICA INITIATIVE



As a strategic partner, the EU seeks to enhance cooperation with Africa to promote actions targeted to finding locally adapted solutions to challenges that are global in nature, but which often hit Africa hardest.

The Horizon Europe Work Programme 2021-2022 included around **40 topics** with a budget of approximately €350 million under calls for proposals that were particularly relevant for cooperation with Africa.

Building on this, the Horizon Europe Work Programme 2023-2024 includes also a similar Africa Initiative II, with almost 30 topics and a total budget of approximately **€300 million**.

Participants can find relevant calls and funding opportunities on the EU Funding & Tenders Portal, which provides filters to easily locate projects focusing on Africa or specific sectors. The EU-AU (African Union) Research & Innovation Partnership also plays a significant role in aligning the strategic priorities and fostering collaboration



Public Health



Green Transition



Innovation and  
Technology



Capacities for Science



# THE MEDITERRANEAN INITIATIVE



The EU and the Southern Mediterranean countries seek to enhance their partnership based on co-creation, co-ownership and shared benefits. The cooperation in the region underlines the importance of common solutions to address major challenges, such as skills mismatch, youth unemployment and brain drain. Accordingly, the Horizon Europe work programme 2023-2024 includes a Mediterranean Initiative with around 37 topics with a budget of around €320 million under Calls for Proposals that are particularly relevant for cooperation with the Mediterranean region.



The calls for proposals, open in different Work Programme parts, encourage the participation of Mediterranean entities. Topics range from:

- ★ developing innovative and integrated renewable energies technologies;
- ★ minimizing climate impact on activities like fisheries and aquaculture;
- ★ improving the reliability of alternative water resources supply;
- ★ acting to reduce plastic packaging pollution from the food system, among many others



**HEALTH**



**CLIMATE  
CHANGE**



**RENEWABLE  
ENERGY**



# MARIE SKŁODOWSKA CURIE ACTIONS

# PROGRAMMES RELEVANT FOR YOU. PILLAR 1- EXCELLENT SCIENCE MSCA

## Key features



**Researchers' training, skills and career development (all stages of career)**



**Excellent research in all domains (bottom-up approach)**



**International, cross-sectoral & interdisciplinary mobility**



**Attractive working and employment conditions**



**Structuring impact on organisations through excellent programmes**



**Strong collaboration with industry and SMEs**

*The information in this presentation is preliminary and subject to the adoption of the work programme*



# MARIE SKŁODOWSKA CURIE ACTIONS

## Marie Skłodowska-Curie Actions in Horizon Europe - An Overview:



### 1. MSCA Doctoral Networks (formerly ITNs)

- Funds consortium based research projects
- Provides recruited researchers with training through research
- Mobility is key – intersectoral, interdisciplinary and international!
- Provides full funding for PhD students



### 2. MSCA Post-Doctoral Fellowships (formerly IFs)

- Provides full funding for an individual postdoctoral researcher
- Mobility is key – intersectoral, interdisciplinary and international!
- Training through research
- Opportunities for European or internationally hosted fellowships with opportunities for secondments.



### 3. MSCA COFUND Doctoral and Fellowship Programme

- Funding through a mono beneficiary scheme
- Training through research
- Mobility is key – intersectoral, interdisciplinary and international!
- EC provides a contribution to the funding for a cohort of PhD students or Post-Docs



### 4. MSCA Staff Exchange Scheme (formerly RISE)

- Funds short-term exchanges of personnel between academic, industrial and commercial organisations throughout the world
- Funds consortium based research projects
- Project implemented through the secondment of staff for a period between 1 and 12 months



# STAFF EXCHANGE SCHEME



## Collaborative R & I project implemented through secondments



- ★ A secondment must last between 1-12 Months
- ★ Counted from the day of departure to the day of return
- ★ At least one month must be completed, after which funding is pro-rata
- ★ A secondment may be split into several stays with one or several beneficiaries or associated partners
- ★ Staff must work full time on secondment, even if normally they work part time.
- ★ An in-built return mechanism must be foreseen
- ★ Can be in different reporting periods (but only claim in one)

# STAFF EXCHANGE SCHEME



- ★ 3 different legal entitles established in 3 different countries
- ★ 2 of which must be based in different EU member states or associated countries
- ★ If the organisations are from the same sector, at least 1 must be from a **Third Country**

Academic sector • Public or private higher education establishments awarding academic degrees, public or private non-profit research organisations and International European Research Organisations (IERO)



Non-academic sector • Any socio-economic actor not included in the academic sector and fulfilling the requirements of the Horizon Europe (HE) Rules for Participation

# STAFF EXCHANGE SCHEME



Contributions for recruited researchers Per person-month		Institutional unit contributions Per person-month	
Top-up Allowance	Special Needs Allowance	Research, training and networking contribution	Management and indirect contribution
EUR 2 300	Requested unit x (1/number of months)	EUR 1300	EUR 1000

**Funding based on: unit cost multiplied by person months spent on secondments**

**No detailed financial reporting report on completed secondment months**

**Ensure all participants understand the financial rules**

# POST DOCTORAL FELLOWSHIPS



## Enhance the creative and innovative potential of postdoctoral researchers

Funds all research areas for postdoctorate students with a MAXIMUM of 8 years' experience



## Fellowships last between 12-36 months depending on the type of fellowship

All fellowships can include short stays, research trips, field work, secondments and placements in the non-academic sector - all are optional



## Fellows can be recruited to either the academic or non-academic sector

NO NATIONALITY REQUIREMENTS FOR EUROPEAN FELLOWSHIPS





# YOUR CONCEPT FOR A POST DOCTORAL FELLOWSHIP



## Have a clear research question(s)

Novelty vs State of the art

Realistic and well- defined research objectives

## Have clear training needs

Enhancing employability and widening the competencies of the researcher

Realistic and well-defined career advancement objectives

# FUNDING FOR POSTDOCTORAL FELLOWSHIPS

Contributions for recruited researchers  
Per person-month

Institutional unit  
contributions  
Per person-month

Living allowance	Mobility allowance	Family allowance <i>(if applicable)</i>	Long-term leave allowance <i>(if applicable)</i>	Special needs allowance <i>(if applicable)</i>	Research, training and networking contribution	Management and indirect contribution
EUR 5 080	EUR 600	EUR 660	EUR 5 680 % covered by the beneficiary	Requested unit <sup>1</sup> (1/number of months)	EUR 1 000	EUR 650

# DOCTORAL NETWORKS



A collaborative research project implemented through individual PhD projects.

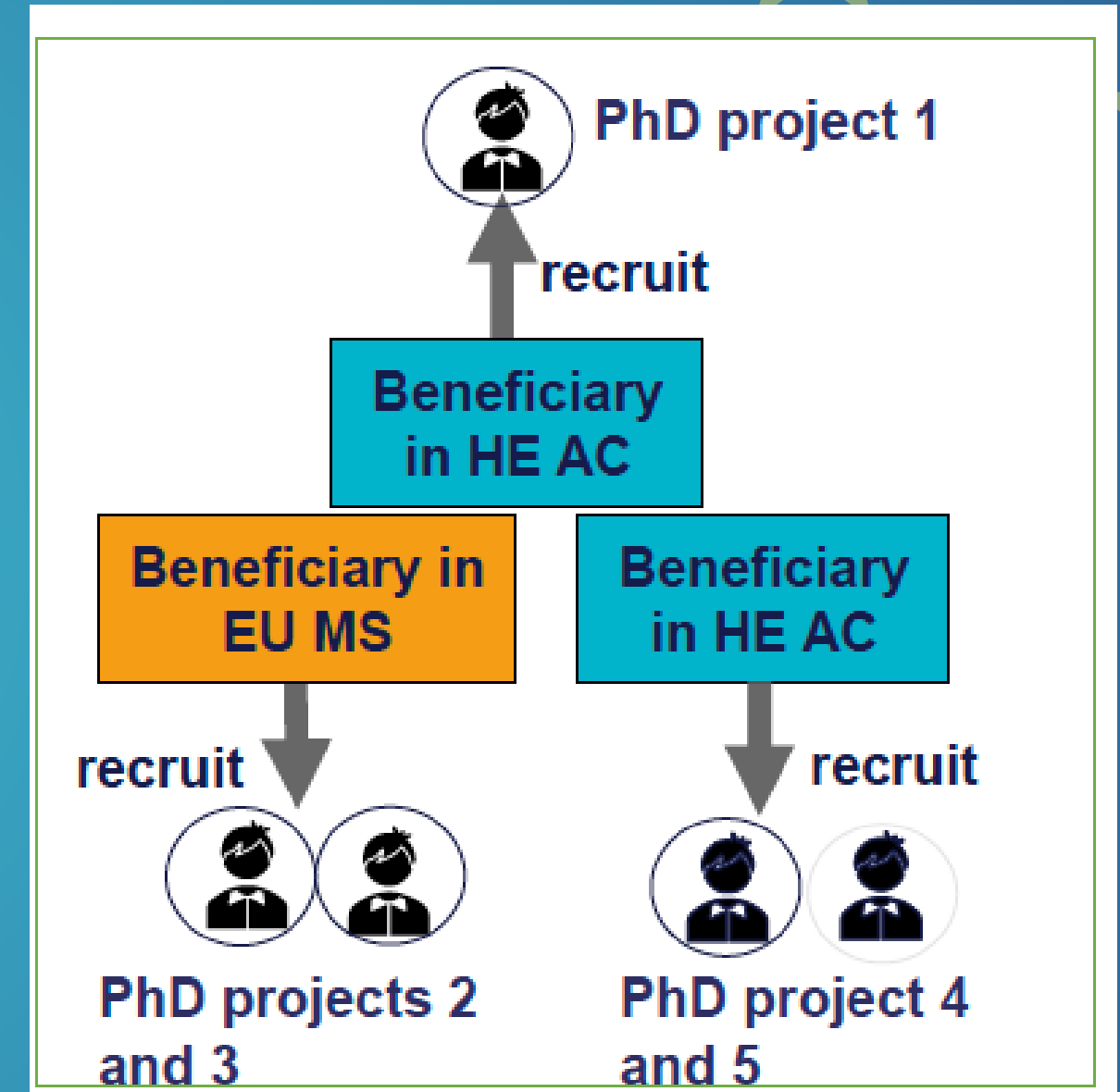
Networks (beneficiaries) recruit PhD students in order to fulfil the research outcomes of the consortium



The consortia should be multidisciplinary, multisectoral and international



The aim is to train creative, entrepreneurial, innovative and resilient doctoral candidates, while undertaking a shared research project



# FUNDING FOR DOCTORAL NETWORKS

Contributions for recruited researchers  
Per person-month

Institutional unit  
contributions  
Per person-month

Living allowance	Mobility allowance	Family allowance <i>(if applicable)</i>	Long-term leave allowance <i>(if applicable)</i>	Special needs allowance <i>(if applicable)</i>	Research, training and networking contribution	Management and indirect contribution
EUR 4010	EUR 710	EUR 660	EUR 4720 x % covered by the beneficiary	Requested unit <sup>1</sup> (1/number of months)	EUR 1 600	EUR 1 200



# NEXT SESSIONS

★ 7th Nov:

**Writing a successful proposal and  
building a consortium**

★ 10th Jan:

**Coordinating a Project to ensure real  
impact**





# THANK YOU!

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