



*Italy*



*France*



*Morocco*



*Spain*



*Tunisia*



*Egypt*



*Lebanon*



*Algeria*

**Tethys Annual Board,  
Sousse, Tunisia,  
December 3-4 2005**



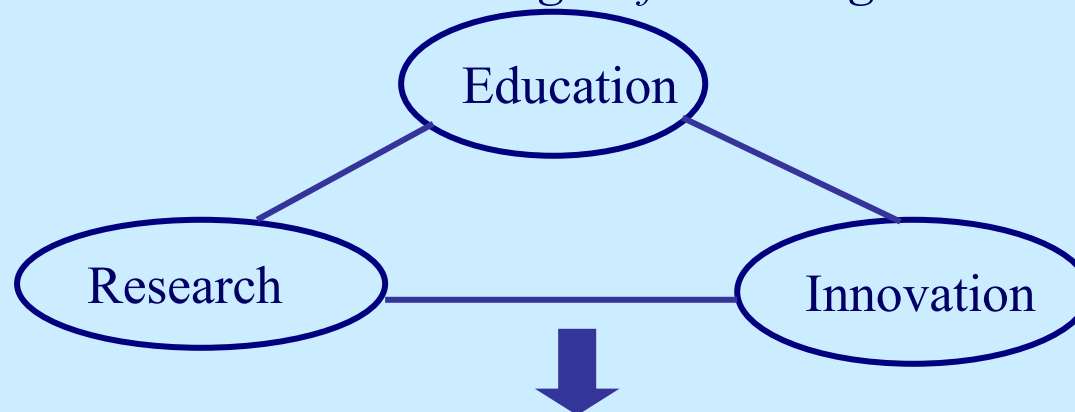
# EU Funding Opportunities:

- **Education Programme:**
  - DG Education
  - Programmes:
    - Integrated Programme in the field of life-long learning (2007-2013)
    - Tempus MEDA (2002 - ??)
- **Research Programme**
  - DG Research
  - Programme: Research Framework Programme 7 (FP7 - 2007-2013)
- **Regional Programme**
  - DG Regio
  - Programmes: Structural Funds (2007-2013)
- **Cooperation Programme**
  - DG External Relation
  - Programme: European Neighbourhood policy (2007-2013)

# General Introduction

- **Political framework:** The Lisbon agenda (Lisbon, Bologna, Gothenburg processes)

*“The triangle of knowledge”:*



growth, jobs, sustainable development,  
health, life quality, etc...

- **Timeliness:** New Programming period: 2007-2013
- **Geographical area:** Barcelona process – MEDA countries: Algeria, Cyprus, Egypt, Israel, Jordan, Lebanon, Malta, Morocco, Syria, Tunisia, Turkey, Gaza/West Bank.



# The European Education Policy





# The Education Programmes

- **DG Education:**
  - Commissioner: Jan Figel
- **Overall objective:**
  - Meet Lisbon targets ⇒ Life-long learning & education (Bologna process)
- **Tools:**
  - Integrated action programme for lifelong learning (IAP) (former Socratès, Erasmus Mundus, elearning, etc.)
  - Tempus (remain independent under the next Financial Perspectives)



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## General Overview of the IAP (1/3)

- **Objective:** to contribute through lifelong learning to the development of the EU as an advanced knowledge society
- **Actions:** to foster interaction, cooperation and mobility between education and training systems in the EU so as the EU becomes a world reference for HE matters.
- **4 vertical Programmes:**
  - (Comenius: school education)
  - Erasmus: higher education (HE) and advanced vocational education and training (VET)
  - (Leonardo da Vinci: vocational training)
  - (Grundtvig: adult education)
- **International Dimension:** only for Erasmus World
- **Budget:** €13.620 billion for 7 years foreseen



## Overview on Erasmus Mundus (IAP – 2/3)

- Objectives:
  - Structuring cooperation with third countries for education,
  - Improving their human resources development,
  - Promoting dialogues and understanding between peoples;
  - Increasing EU visibility & attractiveness and EU diplomas' value
- Target: > 3 million individual participants by 2011 (Erasmus + E. World)
- Who is concerned?
  - Students/trainee in HE and VET
  - Teaching and administrative staff of the applying institutions
  - Enterprises, social partners, working in the HE area
  - Associations linked to HE and VET
- Special features for Erasmus Mundus:
  - Network dimension
  - Open to all countries



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## Erasmus Mundus Actions (IAP - 3/3)

- **Action 1: Erasmus Mundus Masters Courses - Network**
  - Consortium: minimum 3 HE from 3 countries (2 member states)
  - Outputs: a study period in at least two of the three universities, leading to a recognised double, multiple or joint diploma.
  - Funding: €15.000 per year for the consortium, 5 years
- **Action 2: Erasmus Mundus scholarships - Fellowship**
  - Scholarship scheme for third-country graduate students and scholars to follow Action 1 Courses or to work for them.
  - Funding: Fellowship: €1.600 per month for 10 months; travel expenses: €1.000 and scholarship: €4.000 (both per academic year)
  - Mobility compulsory from third countries to the EU (strict conditions)
- **Action 3: Partnerships – extra support for Universities selected in Action 1**
  - Outgoing mobility of graduate EU students and scholars
  - Funding: €5.000 for third countries HE, €400 for students and €4.000 for Universities (monthly), and €1.000 annually for travel expenses
- **Action 4: Enhancing attractiveness – set of specific actions**
  - Consortium: minimum 3 HE from 3 countries
  - Activities: seminars, conferences, publication, mutual recognition of qualifications with third countries





## General Overview of Tempus (1/3)

- Objectives:
  - Mutual understanding: between the EU and partner regions
  - Regional Cooperation: in the HE sphere  $\Rightarrow$  better communication & networks
  - HE modernisation and transition processes  $\Rightarrow$  key instrument for MEDA, impact on national education policies following national priorities.
- International Dimension:
  - Extension to MEDA region, since 2002 onwards.
  - To be continued after 2006
- After 2006: will be pursued, independently from the IAP.



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## Tempus Instruments (2/3)

- Joint European projects:
  - Objective: to help the HE sector to disseminate knowledge outside academic institutions.
  - Targets HE institutions
- Structural and complementary measures:
  - Objective: short-term interventions to support HE reforms
  - Examples: accreditation system, HE good management practice, quality insurance).
  - Targets HE institutions
  - Next call: 15/02/06
- Individual Mobility Grants: 2 windows:
  - Staff from the partner countries to be trained and to do conference abroad;
  - Staff from the EU HE to deliver training courses in partner countries, within the context of Tempus' objectives;
  - Next call: 15/02/06, for visits in August 2006 and May 2007.



## How does it work? (3/3)

- Consortium:
  - Universities and Association of Universities are the core bodies:
    - HE decision-making bodies, administrative staff and teachers, ministerial officials, student organisations;
    - social partners, public/private companies linked with HE, NGOs also possible
  - Rules:
    - At least 2 partners from the EU;
    - In each country a minimum of one University;
    - For complementary Measures, Ministry of Education at least endorses project proposal, ideally is a partner.
- Calls for proposal:
  - Launched by DG Education
- Getting Support:
  - NCPs
  - European Training Foundation
  - European HE International Relations departments
  - [tempus@cec.eu.int](mailto:tempus@cec.eu.int) for general requests



## Information Resources

- DG Education and Training:

[http://www.europa.eu.int/comm/education/index\\_en.html](http://www.europa.eu.int/comm/education/index_en.html)

- The IAP:

- New programme:

[http://europa.eu.int/comm/education/programmes/newprog/index\\_en.html](http://europa.eu.int/comm/education/programmes/newprog/index_en.html)

- Erasmus Mundus:

[http://www.europa.eu.int/comm/education/programmes/mundus/index\\_en.html](http://www.europa.eu.int/comm/education/programmes/mundus/index_en.html)

- Tempus:

- [http://www.europa.eu.int/comm/education/programmes/tempus/index\\_en.html](http://www.europa.eu.int/comm/education/programmes/tempus/index_en.html)

- <http://www.etf.eu.int>



# The European Research Policy





# Overview

- **DG Science & Research:**
  - Commissioner: Janez Potočnik
- **Overall objective:**
  - Meet Lisbon targets:  $\Rightarrow$  Achieve the European Research Area (ERA) to become a knowledge society
- **Targets:**
  - Develop the EU R&D policy  $\Rightarrow$  EU competitiveness
  - Coordinate & reinforce National research activities
  - Support other EU policies (Industry, Env., Aid, etc.)
- **Tools: The Framework Programmes**
  - FP6: 2002-2006: € 17.5 billion
  - FP7: 2007-2013: € 73 billion (EC proposition)



# The international Dimension

- Enhancing competitiveness of the EU:
  - Excellence, human resources, competitiveness
  - ☹ High competition
    - ⇒ *Knowing strength and weaknesses, defining priorities*
- Accompanying sustainable development
  - Programme to be defined with the involved stakeholders in function of the needs of the countries
  - Equitable Partnership with European teams (budget, rights, tasks, involvement, responsibilities, etc.)
  - Emphasis on infrastructures and capacity building
  - ☹ Difficulty to master policy agenda
    - ⇒ *Networking with your national authorities*



## The next FP7

- 4 Programmes:
  - Programme 1: Cooperation
  - (Programme 2: Ideas)
  - Programme 3: People
  - Programme 4: Capacities





# Programme 1: Cooperation

- **Objective:** Realising the European Research Area
- **Activities:** Research projects, on 9 thematic subjects:
  - Health
  - Food, agriculture and biotechnology
  - Information and communication technologies
  - Nanosciences, nanotechnologies, materials & new production technologies
  - Energy
  - Environment (including climate change)
  - Transport (including aeronautics)
  - Socio-economic sciences and the humanities
  - Security and Space
- **International Dimension:**
  - Reinforcing competitiveness: general rules
  - Supporting cooperation (former INCO) – **Dedicated calls per thematic.**



## Programme 3: People

- **Objective:** Reinforce EU attractiveness for researchers and achieve single market for research
- **Activities: Marie Curie Actions**
  - **Training Networks:**
    - for early-stage researchers (PhD Students)
    - for experienced researchers (PostDoc, <10 years of experience)
  - **Individual Fellowships:** (from and to Europe)
    - for experienced research
    - for world-class researchers
- **International Dimension:** Reinforced in this FP7, also in the participation to networks (without any justification)



## Programme 4: Capacities

- Objective: Reinforcing the ERA infrastructures and capacities
- International Dimension: One aspect
  - SSA / CA projects: no research but cooperation projects
  - Supporting the infrastructure building of emerging countries
  - Preparing the 9 thematic subjects of Programme 1, dedicated to the objectives of International Cooperation
  - More directed towards National authorities – But role to play at political level



# Which projects to submit? (1/3)

## Research Projects ⇒ Programme 1 ‘Cooperation’

- Special projects for emerging countries to answer to their needs – e.g. ICT  
⇒ **THEMATIC APPROACH**
- Division in geographical zones (MEDA for Téthys) with specific thematic  
⇒ **IMPORTANCE OF GEOGRAPHICAL PARTNERSHIP (3+3?)**
- Possibility also to join the other projects BUT excellence and competitiveness  
⇒ **STRENGTH/WEAKNESS ASSESMENT**

## Tools:

- Integrated Project (IP)
  - Aim: activity-driven actions, programme approach, multiple issues
  - Consortium: 10 to 20 partners (contractors)
  - EU Contribution: € 4 to 25 M (av. € 10 M )
- STREP:
  - Aim: objective-driven actions, project approach, single issue
  - Consortium: 6 to 15 partners (contractors)
  - EU Contribution: 0.8 to 3 M € (av. € 1.9 M)



## Which projects to submit? (2/3)

### Training Projects ⇒ Programme 3 'People'

- Marie Curie Schemes

⇒ **PARTNERSHIP WITH EU/ASSOCIATED STATES COMPULSORY**

#### Tools:

- Individual Fellowship: Individuals apply, in cooperation with host institutions
  - Early-stage researchers (- 4 years of experience): RTN and EST (FP6), Research Training Network (FP7) – Funding: fellowship, travel allowance, career allowance for the Fellow ; monthly support for the Host (€250-500) + network & management support
  - Experienced researchers (between 4 to 10 years of research experience): OIF and IIF – Funding: idem / rates change
- ☺ New legislation since October for foreign researchers: easier to get research visa
- Research Training Network: Universities apply
  - Research Training Network (RTN) and Early-Stage Researchers Network (EST)
  - Range of budget: until €3 million



## Which projects to submit? (3/3)

### Network Projects $\Rightarrow$ Programme 4 'Capacities'

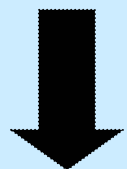
- Network and preparation for Programme 1  
 $\Rightarrow$  **POLITICAL LOBBY**
- Support for infrastructures  
 $\Rightarrow$  **PARTNERSHIP NORTH/SOUTH**

### Tools:

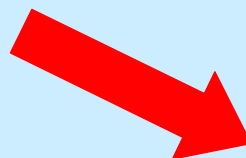
- Coordination Actions (CA) and Specific Support Actions (SSA)
  - Aim: supporting collaboration, coordination or other activities (conferences and studies)
  - Consortium: CA: 13 - 26; SSA: 1 - 15
  - EU Contribution: CA: € 1M ; SSA: € 0.5M

# FP Projects Process

- Call for proposal
  - Draft Documents (M-4)
  - Information meeting (M+1)
  - Official Launch (Work Programme) (M0)
  - Deadline (M+4)
- Preparing the proposal
  - Consortium
  - Project parts proposal (part B):
  - Administrative parts (A1, A2, A3/cost model)
- Submission of proposal (EPSS)
- Evaluation by external & independent experts
- Marks / Threshold according to criteria / Ranking list



**No funding**



## **Funding:**

Contract Preparation Forms (CPF)

Consortium Agreement

Signature

Launch



# Project Funding Rules

**FP6 Rules:** (FP7 still in negotiations / Proposition on Simplification from the Commission beg. December, with new rules)

- Costs Categories:

- Eligible costs (personnel, material, consumables, travel, dissemination & training, management) / Ineligible costs (interest rates, etc.)
- Subcontracting / Third Parties (art.23)
- Direct costs (eligible costs + subcontracting) / Indirect costs (flat rate of 20% of the direct costs minus subcontracting)

- Cost models:

- Additional Costs (AC): 100% of direct additional costs reimbursed + Indirect Costs – *Only for Research Centres and Universities*
- Simplified full costs (FCF): 50% of total eligible costs and subcontracting reimbursed + Indirect Costs
- Full cost: 50% of total eligible costs and subcontracting reimbursed





## Getting ready for FP projects (1/2)

An interesting call???

⇒ Make yourself known: Be reactive

- Contact your existing partners in the EU
- Publish your profile / Write a declaration of interest

⇒ **This implies some previous necessary steps:**

- Visibility of your University
- Existing contacts, notably with EU partners
- Reactivity and Update
- Link with National Authority in Brussels and the EU Commission office in your country



## Getting ready for FP projects (2/2)

### How to start?

- Know yourself! Information to gather:
  - Internal Strength and weakness
  - Existing collaborations (Academia and industry)
  - Existing projects
- Read relevant documents:
  - EC Communication “Building the Europe of knowledge”
  - EC Proposition to the Council: Annex 1 and Annex 3
  - Read documents on FP6 (e.g.: guidelines)
- Inform yourself on the existing initiatives in your field
- Publish a profile of your institution on Cordis

☺ Don't panic! The EC is famous for its jargon and its complexity... It is just a question of getting used to it!



## Information Resources

- Cordis web site (project-focused): [www.cordis.eu.int](http://www.cordis.eu.int)
  - Partner Search:  
<http://fp6.cordis.lu/index.cfm?fuseaction=UserSite.FP6PartnersPage>
  - INCO: [http://cordis.europa.eu.int/inco/home\\_en.html](http://cordis.europa.eu.int/inco/home_en.html)
  - Support (NCP): <http://www.cordis.lu/fp6/getsupport.htm>
- DG Research (policy focused) :  
[http://www.europa.eu.int/comm/research/index\\_en.cfm](http://www.europa.eu.int/comm/research/index_en.cfm)
  - INCO :  
[http://europa.eu.int/comm/research/iscp/index\\_en.cfm](http://europa.eu.int/comm/research/iscp/index_en.cfm)
  - FP7: <http://www.cordis.lu/fp7/>

# The European Regional Policy





# Regional Programme

- **DG Region:**
  - Commissioner: Danuta Hübner
- **Overall objective:**
  - Meet Lisbon and Gothenburg targets  $\Rightarrow$  Cohesion, convergence, growth, employment and innovation
- **Targets:**
  - Regions of the EU ; in one programme third countries also allowed
- **Tools:** 4 Structural Funds / 2 targeted to Universities:
  - European Social Fund (ESF / FSE)
  - European Regional Development Funds (ERDF / FEDER)
- **Budget:** € 336.1 billion (EC proposition)



# New Regional Policy Structuration

- (Objective 1: Convergence:
  - For new Member States)
- (Objective 2: Regional Competitiveness & Jobs:
  - No more zoning)
- Objective 3: Territorial cooperation
  - Fostering economic development and growth, by counter-balancing boundaries obstacles
  - Challenging issues with clear regional and/or supranational boundaries
  - Areas: sustainable development, education thematic, environmental problems, infrastructures/transport, etc.

**⇒ International dimension: only for objective 3 on territorial cooperation, for 2 actions out of 3 actions**



## Innovative aspects of 2007-13 programming for Objective 3

- Geographical extension:
  - Rule of max. 10% of the budget for the two actions (cross-border and transnational cooperation) for **financing activities outside the EU** provided they benefit the regions of the EU
  - Rule of max. 20% of the budget for the same actions to be spent in **adjacent regions from outside the area**
- Cooperation between / responsibilities of partners:
  - More like the FP6 rules
  - 4 new cooperation criteria: joint development, implementation, staffing, financing  $\Rightarrow$  for the cross-border and transnational cooperation actions, need to meet minimum 2 out 4 criteria.



# Territorial Cooperation

- **Cross-border cooperation:**
  - Partners: cross-border regions
  - Priorities: support of growth and job creation
  - Focus: strengthen competitiveness
  - Examples of actions: innovation actions, education/training, health, cross-border business activities, dealing with environment/threats, labour market integration, support for networks, etc.
- **Transnational cooperation:**
  - Partners: amongst macro-regions (TBD) sharing the same geographical issue, etc.
  - Priorities: To increase cooperation amongst Member states, in order to increase economic and social integration and cohesion ('EQUAL spirit')
  - Focus: improve physical interconnections of territories and intangible connections
  - Examples of actions : sustainable transport, prevention of natural hazards, water management, R&D/innovation networks





## How is the Objective 3 financed?

- ERDF funding
- Programmes will receive up to 75% of funding
- Joint management of funding:
  - Joint budget,
  - Equally available to all the partners: activity criteria instead of geographical one
- 10% of funding max. for activities located outside the EU.



## How is the cohesion policy implemented (1/2)?

- **Community Strategic Guidelines**
  - EC priorities to achieve Lisbon and Gothenburg goals
- **National Strategic Frameworks:**
  - Defined by MS;
  - Identify links between the EC priorities and the national / regional ones’.
- **Discussion:**
  - Between EC Committees, Social partners, stakeholders;
  - On the basis of this discussion, the EC will list the selected programmes to be financed and their level of funding.
- **Operational Programmes:**
  - Programmes allowing to meet successfully the objectives laid in the National Strategic Frameworks.
  - Monitoring and assessment



## How is the cohesion policy implemented (2/2)?

### Content of an Operational Programme:

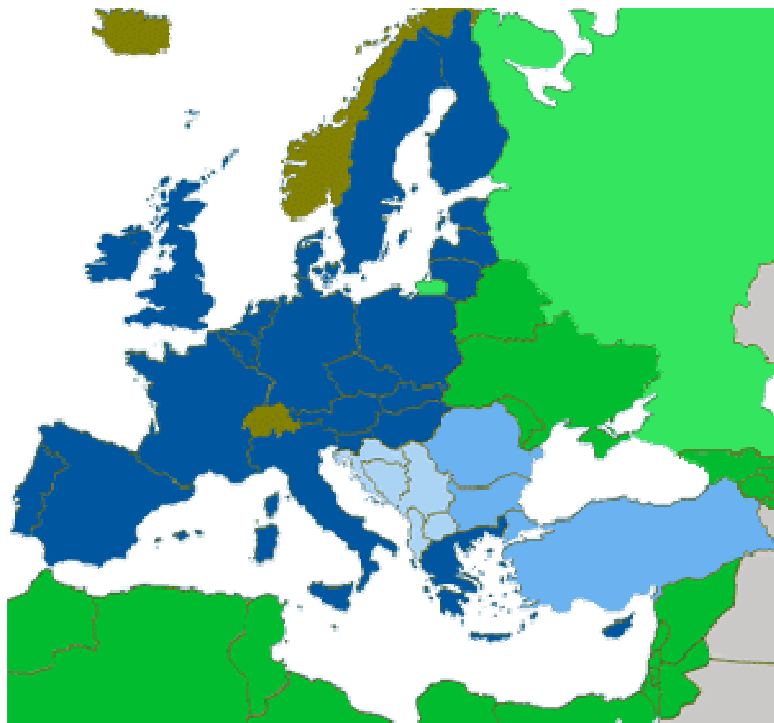
- Themes of the project
- Ex-ante evaluation and expected outcomes
- Justification of relevance with programme priorities
- Breakdown of spheres of assistance
- Financial tables
- Monitoring of the project and its evaluation
- Identification of any major projects expected (€50 million) if any.



## Information Resources

- **DG Regio:** [http://www.europa.eu.int/comm/regional\\_policy/index\\_en.htm](http://www.europa.eu.int/comm/regional_policy/index_en.htm)
- **Next Programme:**  
[http://www.europa.eu.int/comm/regional\\_policy/sources/docoffic/2007/osc/index\\_en.htm](http://www.europa.eu.int/comm/regional_policy/sources/docoffic/2007/osc/index_en.htm)
- **INTERACT:** <http://www.interact-eu.net/4098/411497/0/0>

# The European External Policy towards the MEDA countries





# The European Neighbourhood Policy

- **DG External Aid:**

- Commissioner: Benita Ferrero-Waldner

- **Overall objective:**

- To create a ring of friends around the borders of the new enlarged Union  
⇒ peace, stability and prosperity
- Sharing fundamental values, and privileged cooperation arrangements (political, security, economic and cultural cooperation)
- Concerns 17 countries, ≠ accession countries

- **Cornerstones:**

- Respect for the rule of law
- Respect for human rights
- Sustainable development
- Good governance
- A market economy

- **Tools:** European Neighbourhood and Partnership instruments (ENPI)

- Financial: to replace MEDA instrument, from 2007 onwards
- Technical Support



## How does the ENP work ?

- Areas of actions: political dialogue and cooperation, trade, international market policies, energy, transport, IST, environment, R&D, social policy, cultural aspects
- Strategy:
  - Action Plans to be defined by the country and the EU (for 3 years, renewable tacitly): definition of key priorities, taking into account national problematic and issues.
    - Bilateral Agreement
    - Possibility of cross-border cooperation between 2 or more neighbouring countries or countries facing the same issue
  - Implementation of priorities: ENPI:
    - Window 1: support cross-border cooperation – joint structure involving national, regional and local authorities of EU MS and partner countries
    - Window 2: wider transnational cooperation involving actors from both the EU and partner countries

**⇒ Partnership between countries key for successful projects, around common identified issues (e.g.: water management, etc.)**



## Information Resources

- DG External Relations: <http://www.europa.eu.int/comm/world/>
- The ENP:
  - Web Site: [http://www.europa.eu.int/comm/world/enp/index\\_en.htm](http://www.europa.eu.int/comm/world/enp/index_en.htm)
  - Key Documents: Communication from the EC: “*European Neighbourhood Policy – STRATEGY PAPER*”, 12.5.2004 (COM (2004) 373 final)
- The National Action Plans and strategic papers:  
[http://www.europa.eu.int/comm/world/enp/document\\_en.htm](http://www.europa.eu.int/comm/world/enp/document_en.htm) (to know the key priorities agreed between the EU and the partner states)  
⇒ Already available for the following Téthys partners: Morocco and Tunisia.  
For Lebanon, Egypt and Algeria: on the way to be finalised.





## Contact details

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