

D14.1 ROADMAP FOR THE INTEGRATION OF INTERNATIONAL STRATEGIC ACADEMIC PARTNERS

CHARM-EIGHT ∞ (CHARM-EU EXPANSION, INTER-INSTITUTIONAL CAMPUS,
GOVERNANCE, HIGHER EDUCATION, TRANSFORMATION)

DELIVERABLE D14.1

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EXECUTIVE SUMMARY

This roadmap aims to translate the strategic orientations defined in the CHARM-EU External Relations Strategy (D13.2, approved December 2024) into a concrete and operational framework for the integration of international strategic academic partners.

While D13.2 sets out the long-term vision, priorities and guiding principles of CHARM-EU's international engagement, Deliverable 14.1 focuses on their **practical implementation**. It clarifies how strategic priorities are applied in practice through defined geographical focuses, selection criteria, governance mechanisms and a structured methodological approach.

The roadmap should be understood as a **living and progressive document**. It does not introduce a new international strategy, nor does it aim to predefine all future cooperation activities. Instead, it provides a coherent framework to ensure transparency, consistency and alignment between the analytical work carried out in WP13 and the operational actions implemented under WP14.

In this context, the roadmap serves three complementary purposes:

- to ensure a harmonised and objective application of the selection criteria derived from D13.2;
- to justify and consolidate the portfolio of pre-selected international partners through a qualitative and documented assessment;
- to establish a realistic and sustainable pathway for cooperation, considering the limited availability of dedicated CHARM-EU funding and the need for proportionate, scalable formats of collaboration.

By clearly positioning Deliverable 14.1 as an **implementation tool**, the roadmap strengthens the credibility of CHARM-EU's international engagement and prepares the ground for Deliverable 14.2, which will further define the framework, principles and processes governing international academic partnerships.

The present roadmap specifically responds to:

- **O14.1**, by providing a structured approach to establishing and consolidating partnerships with international academic institutions;
- **T14.1**, through the design of a concrete roadmap translating WP13 strategic outcomes into operational actions;
- while preparing the ground for **T14.2**, which will further formalise international partnerships through a dedicated framework and associated instruments.

In this sense, Deliverable 14.1 focuses on *how* strategic partnerships are identified, justified and operationalised, while Deliverable 14.2 will focus on *how they are formalised and governed*.

2. STRATEGIC GEOGRAPHICAL FOCUS: TRANSLATING WP13 ANALYSIS INTO WP14 ACTION

The geographical priorities guiding WP14 are directly derived from the analytical work carried out under WP13 and formalised in the CHARM-EU External Relations Strategy (D13.2). Rather than reproducing this analysis, the present roadmap focuses on **how its conclusions have been operationalised** to guide the first phase of partner pre-selection.

D13.2 highlighted the importance for CHARM-EU to develop a **balanced and differentiated international engagement**, structured around three broad geographical areas: **Global West, Global South and Global East**. These areas reflect not only geographical distinctions, but also **different cooperation rationales, risks, opportunities and expected impacts**.

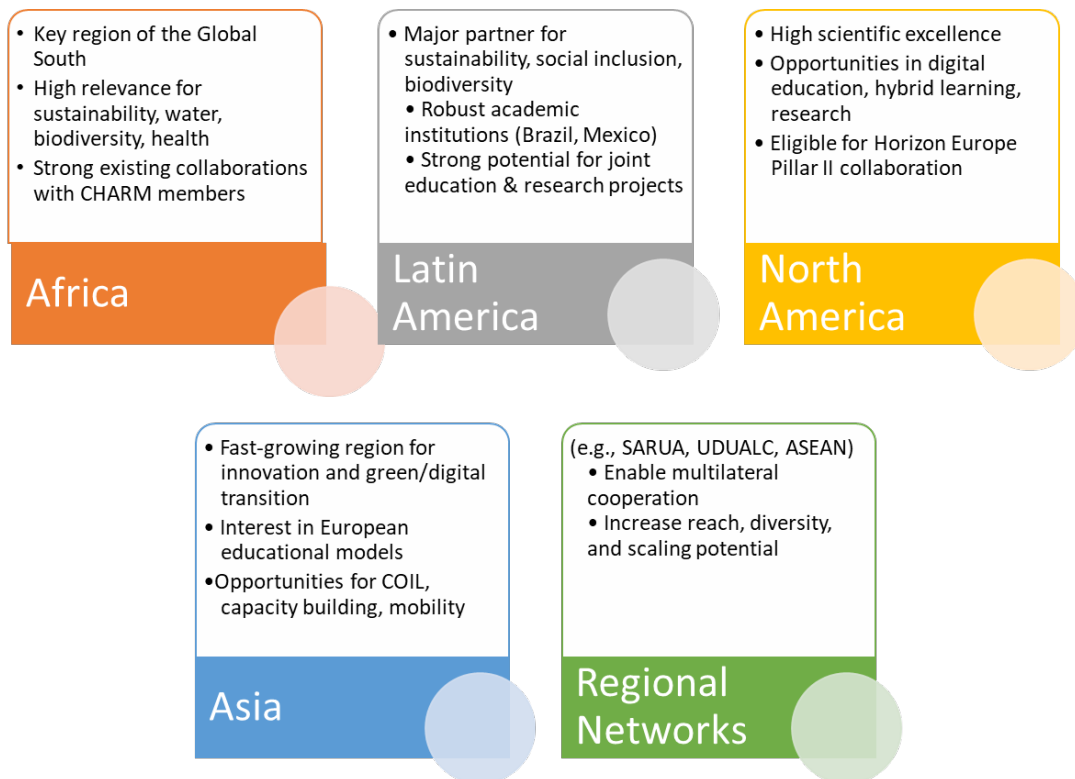


Table 1: Geographical analysis

2.1 Global South: Capacity Building, Sustainability and Societal Impact

The analysis conducted in D13.2 underlined the strategic importance of engaging with partners in the Global South, particularly in Africa and parts of Latin America. Cooperation in these regions is

closely aligned with CHARM-EU's commitments to **sustainable development, capacity building, social responsibility, and equitable partnerships**.

In this context, partnerships in the Global South are expected to:

- Support joint initiatives addressing global challenges (e.g. climate, water, health, inequality);
- Foster institutional capacity building and mutual learning;
- Promote inclusive mobility schemes and long-term academic cooperation.

The pre-selected partner institutions in this area reflect these priorities and correspond to regions where CHARM-EU universities already have academic expertise, historical ties, or ongoing collaborations. The objective is not rapid expansion, but **deep, structured and sustainable engagement**, consistent with EU external cooperation principles.

2.2 Global East: Academic transformation and emerging innovation ecosystems

D13.2 identified the Global East as a region characterised by **rapid transformation of higher education systems**, growing research capacity and increasing international visibility. Engagement in this area is strategically relevant for CHARM-EU in terms of academic innovation, emerging research fields, and exposure to different governance and educational models.

Partnerships in the Global East aim to:

- Encourage academic cooperation in emerging disciplines and innovation-driven sectors;
- Support dialogue on governance models, digitalisation and educational transformation;
- Balance openness with careful consideration of geopolitical and regulatory contexts.

The selection of potential partners in this region reflects a cautious but proactive approach, ensuring that cooperation remains aligned with CHARM-EU values while allowing the Alliance to engage meaningfully with dynamic academic environments.

2.3 Global West: Research excellence and educational innovation

The Global West represents a natural area for cooperation based on **shared academic standards, comparable institutional frameworks and high levels of research intensity**. According to D13.2, partnerships in this region contribute primarily to reinforcing CHARM-EU's international positioning, academic excellence and global competitiveness.

In this context, cooperation focuses on:

- Joint research initiatives and doctoral collaboration;
- Educational innovation, including challenge-based learning and new pedagogical formats;

- Mutual recognition of academic practices and mobility schemes.

The presence of Global West partners within the WP14 portfolio ensures that CHARM-EU maintains a **balanced partnership model**, combining cooperation with comparable systems and engagement in regions with different development dynamics.

2.4 A Collective alliance-level approach to global coverage

A key conclusion of D13.2 is that geographical coverage should be understood at the **Alliance level**, not at the level of individual universities. CHARM-EU's ambition to engage globally does not imply that each member institution must be active in all regions. Instead, the Alliance operates through a **complementary and distributed model**, where partner universities take the lead in specific regions based on their expertise, networks, and strategic priorities.

This collective approach explains why the initial list of pre-selected partners covers multiple continents: it reflects a **shared responsibility within the Alliance** to address global challenges and opportunities, while ensuring realistic and sustainable engagement.

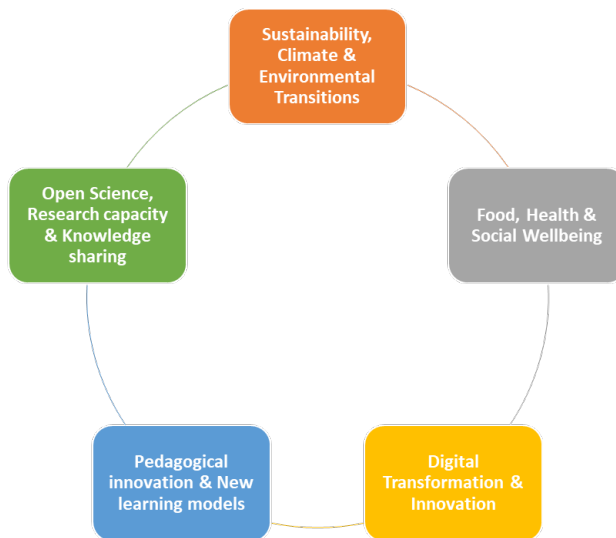
2.5 From geographical priorities to partner pre-selection

The geographical analysis therefore constitutes the **first filtering layer** of the WP14 roadmap. The pre-selected partner universities identified at the end of D13.2 respond primarily to this strategic geographical rationale. In the next step, detailed in Section 3, these institutions are assessed more precisely through a set of harmonised selection criteria, ensuring coherence between strategic intent and operational feasibility.

3. PARTNER SELECTION PROCESS AND WORKING METHODOLOGY

3.1 Key thematic priorities for international cooperation

Building on this strategic foundation, CHARM-EU has identified a limited set of overarching thematic priorities that provide a common framework for international cooperation.



These themes reflect the Alliance’s mission-oriented approach and are designed to support educational innovation, research impact and societal relevance across different geographical contexts. Rather than defining projects at this stage, they serve as guiding areas to assess the relevance of potential partners and to foster multilateral cooperation aligned with CHARM-EU’s values and objectives.

Figure 1: CHARM-EU key thematic priorities

3.2 Partner selection process



Figure 2: Partner selection process

3.2.1. Pre-selection based on geographical areas and existing cooperation

Following the geographical analysis presented in Section 2 and derived from the conclusions of D13.2, a **first pool of potential partner universities** emerged during 2025 through discussions within the Alliance. This initial identification was based on existing academic links between CHARM-EU universities and external institutions, while explicitly aiming to go **beyond a purely bilateral logic** and to explore cooperation opportunities aligned with the CHARM-EU framework.

This first phase resulted in a **reduced list of 12 pre-selected external academic partners (including 1 network of Southern African universities)**, reflecting a balanced geographical coverage at Alliance level and a shared interest in developing cooperation that could potentially involve more than one CHARM-EU partner.



Figure 3 : Pre-selected universities

1. **University of Cadi Ayyad** – Morocco
2. **Gaston Berger University** – Senegal
3. **University of Pretoria** – South Africa
4. **University of the Western Cape** – South Africa
5. **Makerere University** – Uganda
6. **Rongo University** – Kenya

7. **Southern African Regional Universities Association (SARUA)** – Regional Network (Southern Africa)
8. **Jawaharlal Nehru University** – India
9. **National University of Laos** – Laos
10. **University of Toronto** – Canada
11. **University of São Paulo** – Brazil
12. **National Autonomous University of Mexico (UNAM)** – Mexico

Once this preliminary list was established, partner universities were given several months to be assessed through a **two-fold approach**:

- an **objective assessment**, based on the selection criteria identified in D13.2;
- a **qualitative assessment**, based on direct exchanges and exploratory contacts with the partner institutions.

3.2.2 An objective assessment: selection criteria

Following the initial pre-selection based on geographical priorities identified in Deliverable D13.2, an objective assessment phase was conducted to ensure transparency, consistency and alignment with the CHARM-EU External Relations Strategy.

This objective assessment aimed to evaluate the relevance of each pre-selected partner at university against a common and harmonised set of criteria derived from D13.2. These criteria were designed to be sufficiently broad to reflect the diversity of institutional contexts, while allowing for a comparable and evidence-based analysis across all candidate partners.

Strategic alignment with CHARM-EU’s vision, values and priorities,	Institutional Capacity and Commitment	Relevance within the identified geographical area
Academic complementarity	Potential for multilateral cooperation beyond bilateral relations	Capacity to engage in sustainable cooperation over the mid- and long-term

Table 2: The objective assessment covered:

The results of this objective assessment constituted a first filtering layer, ensuring that all shortlisted partner universities met the minimum strategic and institutional requirements defined by CHARM-EU.

3.2.3. Qualitative assessment

In parallel, ambassadors engaged in exploratory discussions with their respective partner institutions to identify potential synergies, complementarities and areas of long-term cooperation that would be relevant not only for one institution, but for the Alliance as a whole.

In **January 2026**, a list (section 5) was established. This list reflects the outcome of a **two-level qualitative analysis**, combining:

- the degree of alignment with the objective selection criteria; and
- the results of the exchanges between CHARM-EU universities and their partner institutions, including the feasibility and relevance of potential cooperation pathways.

This approach ensured that the final selection was both **strategically grounded and operationally realistic**, and that it reflected a shared understanding within the Alliance.

3.3 Working methodology within WP14

For each pre-selected partner institution, one or more **ambassador universities** were designated. Ambassadors were responsible for coordinating the assessment process, consolidating information and proposing potential cooperation perspectives in line with CHARM-EU priorities.

Proposed objectives and cooperation ideas were discussed collectively within WP14 to ensure coherence, avoid duplication, and encourage synergies across the Alliance. Where relevant, feedback and contributions from other Work Packages were integrated to strengthen cross-WP coherence and identify existing CHARM-EU activities that could be opened to external partners.

In particular, the following contributions were considered:

- **WP6 – Extension and Fine-tuning of the CHARM-EU Mobility Scheme:** Collaborative Online International Learning (COIL), Summer schools, mobility schemes and capacity-building initiatives;
- **WP4 – Implementation, Piloting and Evaluation of the Educational Portfolio:** Micro-credentials and modular learning offer, notably in relation to partners in Mexico, Canada and South Africa;
- **WP8 – CHARM-EU IT Tools:** Course Portfolio System, digital identity, virtual learning environments and hybrid learning formats;

- **WP15 – Worldwide Non-Academic Stakeholder Consolidation and Expansion:** Participation in initiatives such as the CHARM-EU Innovator’s Journey and the CHARM-DEN pitching events.

This collective and iterative working methodology ensured that partner selection and cooperation perspectives were embedded within existing CHARM-EU structures, while remaining adaptable to the evolving capacities and priorities of the Alliance.

4. WHAT DEFINES A CHARM-EU ACTIVITY IN THE CONTEXT OF INTERNATIONAL PARTNERSHIPS

A CHARM-EU activity is defined as an initiative that contributes to the Alliance’s mission and added value, and that involves **at least two CHARM-EU partner universities**, potentially in cooperation with one or more external academic partners. Such activities are expected to align with CHARM-EU’s strategic priorities, thematic focus areas and values, while fostering multilateral collaboration, educational innovation and/or research impact.

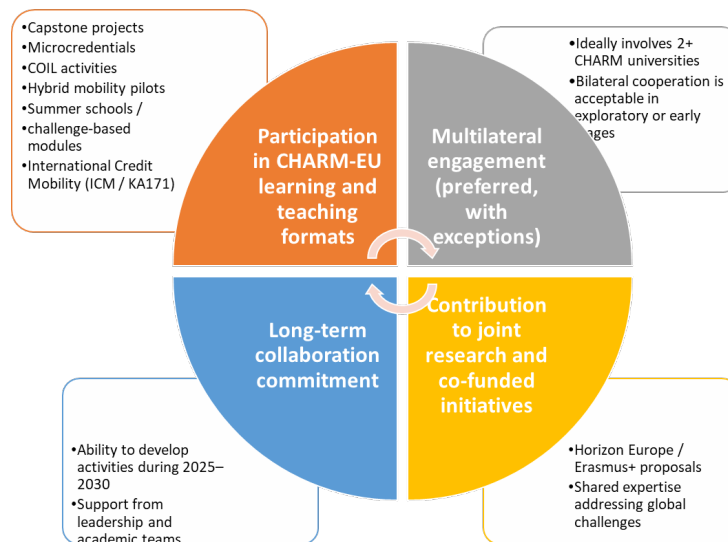


Figure 4 : Definition of a CHARM-EU activity

This framework does not prescribe a fixed or exhaustive list of activities. Rather, it serves as an **indicative reference** to identify how and where external partners can be meaningfully integrated into CHARM-EU. In practice, cooperation will also be shaped by existing synergies, institutional strengths and the specific needs and capacities identified within each partner institution.

Importantly, the inclusion of an activity under the CHARM-EU umbrella does not automatically imply dedicated funding. Activities may rely on existing resources, complementary funding schemes or

digital and hybrid formats. This flexible approach allows the Alliance to support diverse forms of cooperation while remaining realistic, sustainable and adaptable to evolving contexts.

5. APPLICATION OF SELECTION CRITERIA TO PRE-SELECTED PARTNER UNIVERSITIES

The list of strategic partners potentially considered was formed by 12 universities. This selection reflects a shared analysis across the Alliance, combining geographic priorities, objective criteria and qualitative inputs from the ambassador universities.

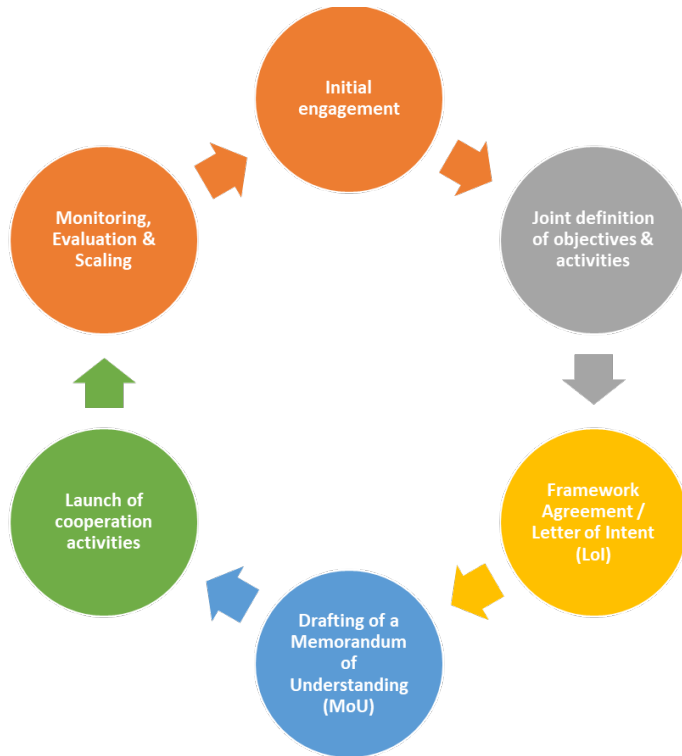
As previously mentioned, the aim of the process was to select international partners that demonstrate strong strategic alignment, shared values and realistic potential for quality cooperation within the CHARM-EU framework.

Based on the assessment of the different criteria, the partner list was **reduced from 12 to 10 institutions**. A **minimum threshold of 50% compliance** with the selection criteria was used as a reference point for inclusion in the consolidated portfolio. Two institutions were therefore **not retained at this stage**. However, it is important to note that **non-retention at this stage does not preclude future engagement**. These institutions may be reconsidered in subsequent phases should conditions evolve, additional synergies emerge, or new strategic priorities be identified.

This consolidation step strengthens the overall coherence of the partnership portfolio and enables WP14 to focus resources and coordination efforts on partnerships with the **highest potential for concrete, multilateral and sustainable CHARM-EU activities**.

6. PARTNERSHIP DEVELOPMENT PROCESS

The partnership development process outlined below reflects a **common and widely shared approach to international cooperation**, which most CHARM-EU universities already apply in their own institutional contexts. It therefore serves as a **guiding framework rather than a rigid sequence**, and its implementation may vary depending on the maturity and history of each partnership.



The key objective is to ensure **early identification of the relevant academic and institutional interlocutors**, transparent information-sharing within the Alliance, and a **collaborative, non-top-down approach** to partnership building. While particular attention is given to identifying bridges between external partners and existing CHARM-EU activities or priority themes, cooperation is conceived as a **co-constructed process**, based on mutual interests, capacities and needs, rather than as an imposed model.

Figure 4 : Partnership development process

To support this approach, **operational tools and templates** (such as guidance notes, letters of intent, partnership charters and monitoring mechanisms) will be further developed and detailed under **Deliverable 14.2**, with the objective of providing a coherent, transparent and usable framework for all partners involved in international cooperation.

7. ROLES, RESPONSIBILITIES AND COORDINATION FRAMEWORK

7.1 WP14 coordination

The coordination of WP14 is led by **Université de Montpellier (UM)** as **WP14 Coordinator**, with the **University of Barcelona (UB)** acting as **WP14 Co-Coordinator**.

Together, UM and UB ensure:

- the overall coherence of international academic partnerships with CHARM-EU strategic priorities,
- the alignment between WP14 activities and relevant contributions from other Work Packages,
- the preparation of discussions and proposals to be shared with the PMT and, when relevant, the Executive Board.

The WP14 coordination team is responsible for facilitating dialogue, consolidating inputs from partners, and ensuring a consistent and transparent implementation of the roadmap.

7.2 Ambassador universities

For each pre-selected external partner institution, one or more CHARM-EU universities are designated as **ambassadors**.

Ambassador universities:

- act as the main contact point with the external partner,
- coordinate the collection and sharing of information related to the partnership,
- identify potential cooperation opportunities aligned with CHARM-EU activities and values,
- report on progress, challenges and perspectives within WP14.

Ambassadors are expected to work in close coordination with other CHARM-EU partners to promote multilateral cooperation and avoid isolated bilateral approaches.

7.3 Coordination mechanisms

To support effective collaboration and shared ownership within the Alliance, the following coordination mechanisms are established:

- **Monthly WP14 meetings** to discuss progress, challenges and next steps related to international partnerships.
- **Need for coordination between ambassadors of the same partner**, information to other members of the Alliance during monthly meetings (+ tracking table)
- **Bilateral coordination meetings** between UM and individual Alliance members, organised as needed to provide targeted support and address specific issues.
- **At least one in-person WP14 meeting per year**, aimed at strengthening coordination, building trust and jointly advancing strategic discussions, particularly in relation to Deliverable 14.2 and long-term partnership development.

These coordination formats are designed to remain flexible and adaptive, taking into account the diversity of partnership contexts and levels of maturity.

8. INDICATIVE TIMELINE (2025–2027)

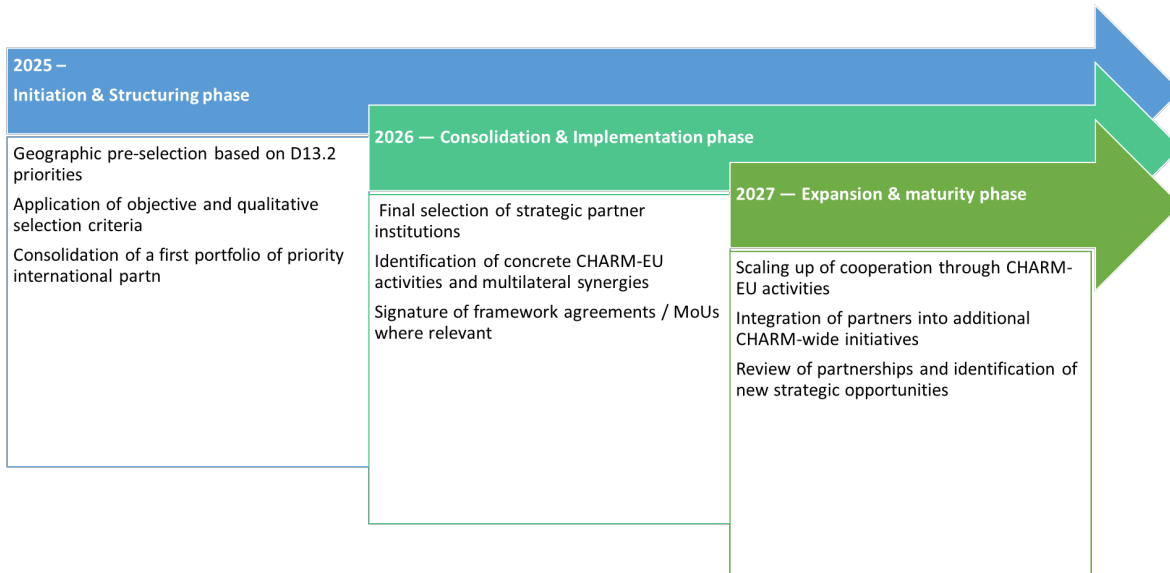


Table 4 : Indicative timeline

9. SOURCES OF FUNDING AND RESOURCE MOBILISATION

CHARM-EU does not dispose of dedicated funding specifically earmarked for the implementation of international cooperation activities with external academic partners. As a result, the feasibility and scope of cooperation largely depend on the nature of the activities envisaged, the level of engagement of the partner institutions, and the capacity to mobilise complementary funding sources.

This constraint is an important element to be transparently addressed during discussions with external partners. Participation in CHARM-EU activities does not automatically imply financial support, and funding arrangements must be considered on a case-by-case basis, depending on the activity concerned and the resources available at the time.

Within this framework, WP14 has identified several **potential funding pathways** that may support international cooperation activities:

Mobility-related funding

- **Erasmus+ International Credit Mobility (ICM)** schemes, either existing or newly submitted, including possible multilateral applications involving several CHARM-EU partner universities (e.g. ongoing or potential ICM schemes between UM and the University of Pretoria in relation to the CHARM master).
- Mobility embedded within existing CHARM-EU programmes or activities, subject to availability and eligibility conditions.

Institutional and internal resources

- **Institutional funding** mobilised by individual CHARM-EU partners to support strategic initiatives aligned with the Alliance's objectives (e.g. the doctoral platform involving UB, São Paulo and Pretoria, financed by UM).
- In-kind contributions such as staff time, digital infrastructure, or hosting of hybrid activities.

Research and education funding

- **Horizon Europe** and other international research programmes supporting collaborative research and capacity building.
- **Erasmus+ Capacity Building in Higher Education (CBHE)** actions for education-focused cooperation.
- National and international funding schemes (e.g. IRD or equivalent agencies), depending on thematic focus and geographic context.

Furthermore, funding availability is considered a key factor in assessing the feasibility and sustainability of proposed cooperation activities. WP14 therefore promotes a pragmatic and flexible approach, prioritising activities that can be implemented with limited resources, including digital, hybrid or low-cost formats, while remaining open to more ambitious initiatives when suitable funding opportunities arise.

10. IMPACT

This roadmap is expected to generate impact at three complementary levels: **partner institutions**, **the CHARM-EU Alliance**, and **the broader European Higher Education Area**. Its primary contribution lies in strengthening the coherence, sustainability and added value of CHARM-EU's international academic partnerships beyond Europe.

10.1 Impact at partner and institutional level

For CHARM-EU member universities and their international partners, the roadmap provides a **shared and transparent framework** to structure cooperation beyond existing bilateral initiatives. It supports ambassador universities in engaging with external partners in a more coordinated and strategic manner, while respecting institutional autonomy and existing cooperation dynamics.

By clarifying thematic priorities, selection criteria and cooperation pathways, the roadmap facilitates:

- clearer positioning of international partnerships within institutional strategies;
- improved internal coordination between international offices, academic teams and governance bodies;

- more realistic identification of cooperation opportunities, including low-cost, digital or hybrid activities where appropriate.

10.2 Impact at Alliance level

At Alliance level, D14.1 contributes to consolidating a **coherent and balanced global engagement** of CHARM-EU. It helps reduce fragmentation of international initiatives by providing a common methodological basis for partner selection and cooperation development, aligned with the External Relations Strategy (D13.2).

The roadmap strengthens synergies between Work Packages (notably WP4, WP6, WP8 and WP15) and supports the integration of international partners into existing CHARM-EU activities, where relevant. It also enhances institutional memory and collective monitoring through shared assessment tools and tracking mechanisms.

Overall, this deliverable reinforces CHARM-EU's capacity to act as a **credible and structured global academic actor**, while remaining adaptable to evolving contexts and resources.

10.3 Impact on sustainability and long-term cooperation

By promoting a phased, non-binding and evaluation-based approach to partnership development, the roadmap supports the **sustainability and equity** of international cooperation. It encourages long-term engagement grounded in mutual interest, reciprocity and feasibility, rather than short-term or opportunistic collaborations.

The methodology developed under D14.1 allows the Alliance to:

- regularly assess the relevance and performance of partnerships;
- adjust the partner portfolio according to strategic priorities and capacities;
- prepare the ground for further structuring activities under Deliverable 14.2.

10.4 Transferability and European added value

The approach outlined in this roadmap is **transferable and scalable** and may serve as a reference for other European University Alliances seeking to structure international academic partnerships beyond Europe. By aligning institutional cooperation with European values, global challenges and multilateral collaboration formats, D14.1 contributes to strengthening the international dimension of the European Higher Education Area.

CONCLUSION

This roadmap provides CHARM-EU with a structured and transparent framework to guide the development of international academic partnerships beyond Europe, in line with the Alliance’s External Relations Strategy (D13.2). By articulating a shared methodological approach, clear selection criteria and a progressive partnership development process, it ensures coherence, alignment and institutional ownership across the Alliance.

The roadmap does not seek to prescribe a one-size-fits-all model for cooperation. Rather, it establishes common reference points that allow CHARM-EU partners to engage international institutions in a flexible, context-sensitive and collaborative manner, while preserving academic autonomy and respecting existing bilateral and multilateral dynamics.

Given the absence of dedicated funding for international cooperation at Alliance level, this document also acknowledges the importance of realism and sustainability. It emphasises the need to align ambitions with available resources, to leverage existing instruments and funding schemes, and to prioritise activities that generate clear added value for CHARM-EU and its partners.

Finally, this roadmap is conceived as a living document. It will be revisited and refined as partnerships evolve, cooperation matures and new opportunities emerge, notably in articulation with Deliverable 14.2 and future phases of the Alliance. In this sense, it provides a solid foundation for long-term, equitable and strategically anchored international cooperation within CHARM-EU.

External partner name	
Ambassadors	
PART A - <u>Objective assessment</u>	
Strategic alignment with CHARM-EU	
Shared values and principles	
Strategic geographic relevance	
Academic Complementarity	
Level of complementarity	
Multilateral Cooperation Potential	
Institutional Capacity and Commitment	
Feasibility and Sustainability	
Current status of cooperation with this partner in terms of CHARM activities	
PART B – Qualitative assessment	

Assessment of alignment with CHARM-EU selection criteria	
%	