

B 3 ORGANISATION AND METHODOLOGY

1. RATIONALE

The implementation of the EU Global Strategy¹ as this was decided by the Member States in a series of Council Conclusions at Heads of Government and State as well as at Ministers' level since 2016, provide a new momentum regarding the design, development and acquisition of defence capabilities. In this scenario, the European Commission was assigned by the Member States with an important role to underpin the development of defence capabilities with EU tools and instruments including and most importantly with EU funding. Existing funding schemes were extended to address security and defence needs while new tools were designed for the current and upcoming Multiannual Financial Framework 2021-2027 (MFF 2021-2027) such as the Preparatory Action on Defence Research (PADR), the European Defence Industrial Development Programme (EDIDP), and the European Defence Fund (EDF).

New regulations and new processes are in place or will be in place in the coming years. Similarly, new actors and beneficiaries are eligible or even most prominent to seek for access to the new opportunities including EU funding.

Military Institutes are key stakeholders given their direct link to the defence users, the armed forces of the Member States, as well as their strong background on defence research. Such expertise and specific profiles are very suitable and highly desirable to join the upcoming consortia to develop stronger and winning projects' proposals to access EU funding.

Military Institutes Academies lack knowledge to access the current EU funding landscape, thus understanding the EU processes contrary to most of civil academic institutions across Europe, which have an embedded knowledge in accessing EU funding to boost their research activities and support their financial needs. This represents a major risk for Military Academies.

Furthermore, Military Academies lack networking with industrial actors of the defence sector, which makes it difficult to establish and consolidate cooperation as well as join consortia working to draft projects' proposals to access EU funding.

In light of the upcoming MFF and the European Defence Fund specifically, an early action to address these shortfalls is important to support Military Academies to obtain a prominent position to access EU funding.

¹ European Union Global Strategy, Shared Vision, Common Action: A Stronger Europe - A Global Strategy for the European Union's Foreign And Security Policy, https://eeas.europa.eu/archives/docs/top_stories/pdf/eugs_review_web.pdf, Last review: 15/07/2020

2. STRATEGY

In light of the scope of this assignment – i.e. organisation of a closed-door / distance learning workshop addressing Military Academia personnel followed by Working Tables with industry's representatives (up to 27 participants overall²) – the below high-level approach to meet the requirements listed in the Terms of Reference is presented.

STEP1	Assessment of the EU funding programmes suitable for R&D activities of Military Academia
STEP2	Selection of the major relevant technical aspects of the identified EU funding programmes to be presented during the lecture session
STEP3	Identification, shortlisting and invitation of relevant industries to include in the working tables
STEP4	Preparatory actions for the Working Tables
STEP5	Preparation of the learning/supporting material (front lecturers + working tables)
STEP6	Delivering of the lecture (Day 1 of 8 academic hours – '45 each or Days 1-2 of 4 academic hours in total for distant) and Setting up working tables (Day 2 of 8 academic hours – '45 each or Days 3-4 of 4 academic hours in total for distant)
STEP7	Follow up

Within the Steps highlighted above, we aim to:

- ▶ Present the overall design of the EU funding schemes (H2020, EDIDP, LIFE, ERASMUS+, HORIZON EUROPE, EDF etc.) with a focus on those compatible for R&D activities of Military Academia,
- ▶ Analyse the technical aspects of the European Defence Industrial Development Programme (EDIDP) and European Defence Fund (EDF), including procedures, rules and application processes;
- ▶ Provide the steps to be followed in order to access EU funding;
- ▶ Support the creation of links/synergies between Military Institutions and Industry

² Participants are expected to be from European Military Academies (Land Forces, Navy & Air Force) and Industry. The final number of participants might change upon agreement of both the Contractor and Contracting Authority

The **KEY AREAS** to be covered are:

- ▶ Existing and upcoming EU funding schemes (H2020, EDIDP, LIFE, ERASMUS+, European Universities, HORIZON EUROPE, EDF etc);
- ▶ Structure, objectives, type of eligible actions and rules of the European Defence Industrial Development Program (EDIDP) and European Defence Fund (EDF).
- ▶ H2020 proposal structure as well as proposal development approach and professional tips

In practical terms, the tasks to be performed are expected to be the following:

STEP1 / Assessment of the EU funding programmes suitable for R&D activities of Military Academia

Task 1	Desk research to identify currently available and upcoming EU funding programmes
Task 2	Assessment and selection of the most suitable EU funding programmes for R&D activities of Military Academia

STEP2 / Selection of the major relevant technical aspects of the identified EU funding programmes to be presented during the lecture session

Task 3	Analysis and professional elaboration of the major relevant technical aspects of the European Defence Industrial Development Programme (EDIDP) and European Defence Fund (EDF – if official Guidelines for Applicants are available)
Task 4	Analysis and professional elaboration of the major relevant technical aspects of H2020 proposals

STEP3 / Identification, shortlisting and invitation of relevant industries to include in the Working Tables

Task 5	Desk research of relevant EU industry active in the field of Security and Defence (including contact details collection)
Task 6	Upon exchange with ESDC, selection of the suitable Industries to be invited to the Working Tables and corresponding formal invitation

STEP4 / Preparatory actions for the Working Tables

Task 7	In light of the invited Industries and corresponding expertise/field of activities, specific calls for proposals will be selected (one call per each Working Table)
Task 8	Development of a structured approach to guide the various Working Tables towards: (i) consortia building techniques; (ii) development of a sound project concept in line with the identified call for proposal; (iii) development of an high level Work Plan
<u>STEP5 / Preparation of the learning/supporting material (front Lecturers + Working Tables)</u>	
Task 9:	Leveraging on the inputs and results achieved under Task 1, 2, 3, and 4, tailored learning/supporting materials will be developed. ESDC will provide feedback, including the list of expected participants, and final validation of the developed material. An course assessment questionnaire will be also developed.
<u>STEP6 / Delivering of the lecture (Day 1 of 8 academic hours – '45 each or Days 1-2 of 4 academic hours in total for distant) and Setting up working tables (Day 2 of 8 academic hours – '45 each or Days 3-4 of 4 academic hours in total for distant)</u>	
Task 10:	This task consists in the actual delivering of the Lectures and Working Tables sessions. In light of the current global pandemic situation and corresponding uncertainty, we foresee the possibility to provide the lectures/working tables in the following two formats: <ul style="list-style-type: none"> ▶ Residential Lectures at premises provided by ESDC located in Brussels ▶ Distant Learning using the ILIAS Learning Management System platform provided by ESDC
<u>STEP7 / Follow up</u>	
Task 11	The inputs and results achieved during the Working Table session will be assessed. Highly promising project concepts will be shared with ESDC and the respective specific Working Tables' participants.
Task 12	Following the finalisation of Tasks 1 to 11, a Project End-Review Report will be drafted using PM ² Methodology Template.

The expected Inputs and corresponding Outputs are presented in the below table.

<u>INPUTS</u>	<u>OUTPUTS</u>
<ul style="list-style-type: none"> ▶ Desk research of available funding opportunities using SEDIA / Funding & Tender portal + released Work Programmes 	<ul style="list-style-type: none"> ▶ Selection of the most suitable EU funding programmes for R&D activities of Military Academia
<ul style="list-style-type: none"> ▶ Guide for Applicants ▶ Professional experience and expertise 	<ul style="list-style-type: none"> ▶ Selection of major relevant technical aspects of the European Defence Industrial Development Programme (EDIDP), European Defence Fund (EDF) and H2020
<ul style="list-style-type: none"> ▶ Desk research, networking, personal contacts 	<ul style="list-style-type: none"> ▶ List of relevant Industries' representative to invite to the Working Tables ▶ Formal invitation email text
<ul style="list-style-type: none"> ▶ Selection of major relevant technical aspects of the European Defence Industrial Development Programme (EDIDP), European Defence Fund (EDF) and H2020 ▶ Guide for Applicants ▶ Professional experience and expertise 	<ul style="list-style-type: none"> ▶ Learning / Supporting Materials to be used during the Lectures and Working Tables sessions
<ul style="list-style-type: none"> ▶ Inputs gathered during the implementation of the whole assignment 	<ul style="list-style-type: none"> ▶ Project End-Review Report

As regards the Lecturing session, we developed a preliminary structure that we expect to deploy. The final structure of the Lecturing session will be agreed and finetuned in collaboration with ESDC ahead of the delivery of the Lecturing sessions. The same logic and approach will be applied for the Supporting Material to be used during the Working Tables session.

The preliminary developed modules' content is presented below.

LECTURES SESSION STRUCTURE (preliminary)

Module 1	<ul style="list-style-type: none"> Architecture of the EU funding programmes – What are the key elements of the respective funding programmes? – What will be major changes between the current and the next MFF; Consortium building – How to identify suitable partners to structure a good consortium? – What tools exist for partners search?
Module 2	<ul style="list-style-type: none"> Administrative part – What administrative documents are required during submission by the coordinator and/or by the consortium partners? – How to use the SEDIA portal? How does the submission work (steps & tricks)? Technical part – Which sections compose the technical part? – How to approach the technical part writing phase? Financial part – How to build the budget? – Basic financial rules and calculation methods
Module 3	<ul style="list-style-type: none"> Operational approach – How to identify a project idea suitable for the targeted EU funding scheme – Which funding programme and call might be suited best? – How to build a sound project concept based on the call's requirements – setting the objectives – Identification of the main activities and tasks – Roles and responsibilities; Practical session – Development of a sound, structured, complete WORKPLAN: – Structure and rationale behind: from Work Packages to Tasks (including Dissemination, Communication and Exploitation activities) – Minimum required Work packages and Tasks – Assigning Work Packages / Tasks
Module 4	<ul style="list-style-type: none"> Project implementation (as Coordinator) – Coordinator's role and responsibilities – How to monitor tasks implementation, project results and impact? – Dissemination, Communication and Exploitation activities, monitoring methods and reporting – Effective communication with the Funding Authority and understanding of expectations / requests; Finance Project Implementation and Monitoring – Continuous and Periodical Reporting – Financial rules and calculation methods: how to correctly calculate costs to submit in the financial reports

3. BACKSTOPPING, SUBCONTRACTING AND CAPACITY PROVIDING ENTITIES

Not applicable.

4. INVOLVEMENT OF ALL MEMBERS OF THE CONSORTIUM AND OF CAPACITY PROVIDING ENTITIES

Not Applicable.

5. TIMETABLE OF WORK

Based on our discussions with the EEAS Secretariat ESDC, we understand that the course could either take place in 1) hybrid format (some attending physically and some remotely) and in such case it will last 2 days or 2) in the form of synchronous e-learning and in such case it will last 4 days.

The proposed Timetable of Work (ToW) is taking account “buffering additional time” in order to counteract potential delays due to internal factors and especially external factors (e.g. Covid19 pandemic).

	<i>N-45</i>	<i>N-30</i>	<i>N-7</i>	<i>N</i>	<i>N+1</i>	<i>N+2</i>	<i>N+3</i>	<i>N+5</i>	<i>N+7</i>	<i>N+15</i>
Hybrid Format (Physically and Remotely)	Contractor to provide to ESDC 1st draft of the workshop programme	ESDC to approve the final programme and send invitations to participants	ESDC to provide to the Contractor the list of participants	1st Day of the workshop	Day of the workshop	-	-	Contractor to provide to ESDC the course presentations for distribution	Contractor to send the course assessment sheet to ESDC for distribution and subsequent reports	Project end-review report following the PM ² Methodology template
Synchronous E-learning (Distant)					Day of the workshop	Day of the workshop	Day of the workshop			