



European Defence Fund Info Days

Webex teleconference, 1 September 2021

**Directorate-General for
Defence Industry and Space**

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Does not represent an official position of the European Commission and does not bind the Commission in any way.





Background and context

Challenges



Decreased real defence expenditure by EU Member States

Increased security threats

Defence R&D expenditure decreased for a much longer timespan than defence equipment procurement



R&D makes up a high proportion of defence equipment costs



25%-30% of combat aircraft



30% of tactical missiles



60% of surveillance and navigation satellites



40% of unmanned air vehicles



Development costs of complex defence systems are beyond the reach of most Member States

Solution

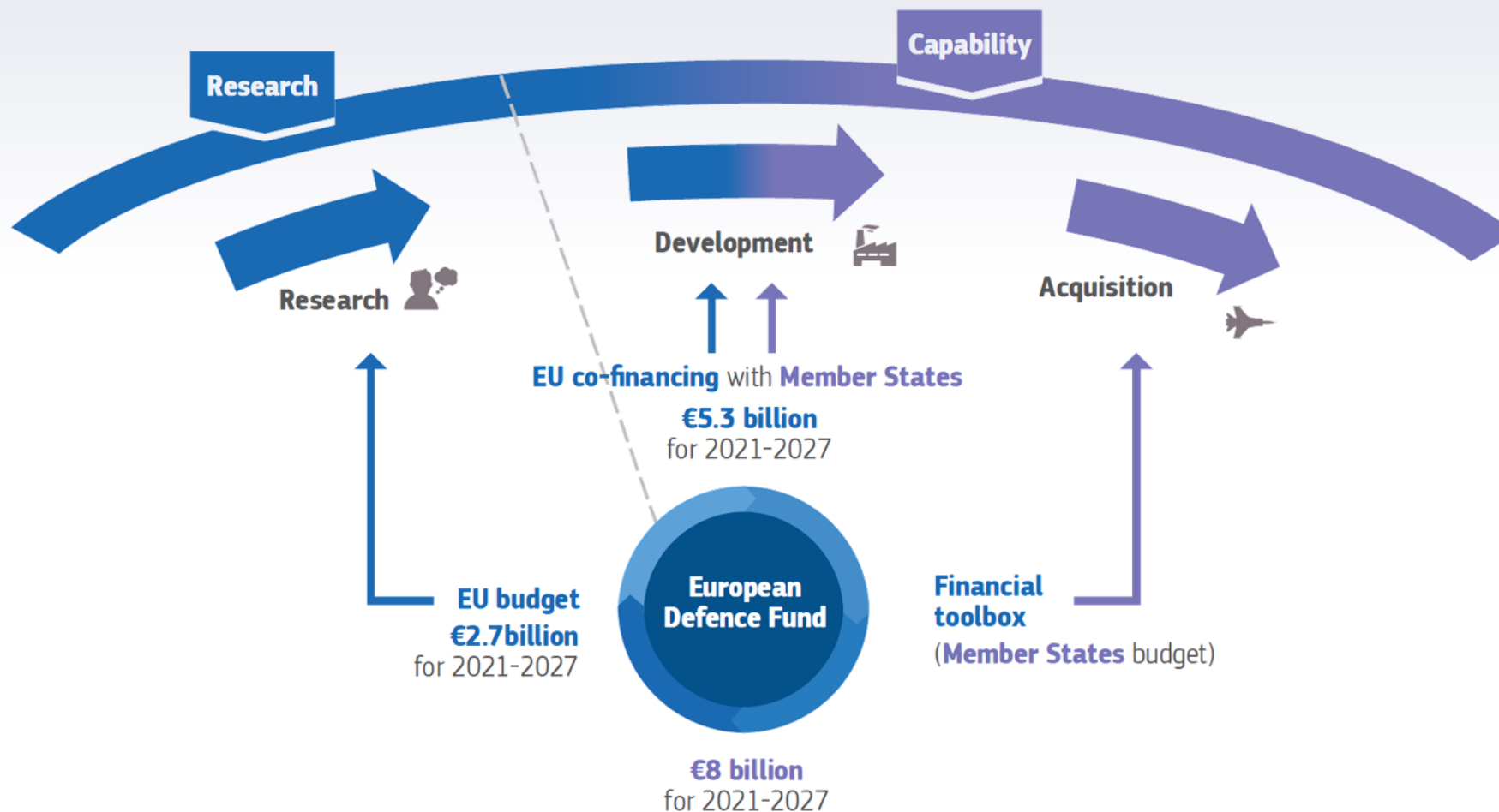
European defence R&D cooperation:

- **€90 million - Preparatory Action on Defence Research (PADR)** to support collaborative research (2017-19)
- **€500 million - European Defence Industrial Development Programme (EDIDP)** for cooperative capability development projects (2019-20)
- **€7,95 billion - European Defence Fund** for 2021 – 2027 to improve the EU defence industry competitiveness and innovation and increase cross-border cooperation in defence R&D



The European Defence Fund (EDF)

supporting the complete capability development cycle





Preparatory Action on Defence Research (PADR)



Regulation

Preparatory Action to prepare future programmes
Based on Horizon 2020 with defence specificities



Duration

3 years (2017-2019) with projects running until 2023



Budget

€ 90 million allocated to calls for proposals published between 2017 and 2019



Objectives

- ▶ Test mechanisms to prepare, organise and deliver EU-funded cooperative defence research
- ▶ Improve competitiveness and innovation of the European defence industry
- ▶ Stimulate cooperation amongst research & technological development actors across Europe



European Defence Industrial Development Programme (EDIDP)



Regulation

Regulation 2018/1092 of 18 July 2018 establishing the European Defence Industrial Development Programme aiming at supporting the competitiveness and innovation capacity of the Union's defence industry



Duration

2 years: 2019-2020



Budget

EUR 500 million for the period 2019-2020



Objectives

- ▶ to foster the competitiveness, efficiency and innovation capacity of the defence industry, contribute to the Union's strategic autonomy
- ▶ to support and leverage the cooperation, including across borders. This cooperation shall be in line with defence capability priorities agreed by MSs
- ▶ to foster better exploitation of the results of defence research supporting the competitiveness of the European defence industry



Objectives of the European Defence Fund

Contribute to the **strategic autonomy** of the EU

Foster **competitiveness and innovation** of European defence industry

Support R&D projects on defence products and technologies; including **disruptive technologies**

Build **partnerships** between defence actors across Europe + stimulate joint acquisition (not financed)

Closing the **technological gap** in European defence sector

Strengthening other security and defence initiatives in Europe



Eligible entities

- Consortium of at least **three legal entities** established in at least **three different Member States/Associated Countries (Norway through the EEA agreement)**
- Only **entities established in the Union** or in an Associated Country which are not controlled by third countries/companies
- Exception if conditions relating to the **security and defence interests of the Union** and its **Member States** are met:
 - No risk in the ability to perform the action (security of supply)
 - Sensitive information is not accessible to 3rd country entity (security of information)
 - No Transfer of IP (IPR remains in the EU)**Guarantees** approved by Member States needed
- Companies outside the Union **can cooperate** (conditions above apply), but **without EU funding**



Eligible actions

- **Research** actions: primarily research (applied research/fundamental research) with an **exclusive focus on defence applications** - *low TRL (up to 4 – 5)*
- **Development** actions: defence oriented activities primarily in the development phase (new products/technologies – upgrading – **excluding the production or use of weapons**) - *higher TRL (5 – 8)*
- **Disruptive technologies** for defence: technologies the application of which can radically change **the concepts and conduct of defence affairs**

→ At least 4% and up to 8% of the **overall** budget



Eligible actions

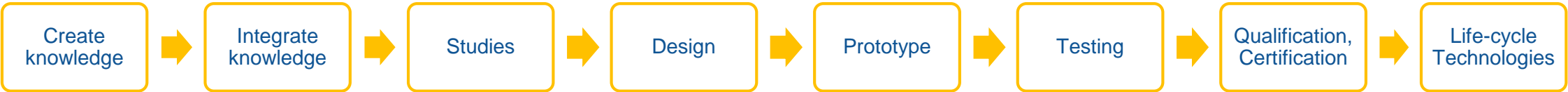
- Background and generated foreground **IP** shall **not be subject to any control or restriction** by non-EU countries/entities
- Costs of the action that are not covered by Union support are to be covered by other means of financing (such as **Member States co-financing**)
- Design activities must be based on **harmonized defence capability requirements** jointly agreed by at least two Member States or associated countries.
- System prototyping and beyond:
 - must be based on **common technical specifications** jointly agreed by the Member States or associated countries that are to co-finance or that intend to jointly procure the final product or to jointly use the technology;
 - at least two Member States or associated countries need to show their **intention to procure** the final product or to use the technology in a coordinated way, including through joint procurement where applicable.



Type of action, activities, funding rates



Activities:



R	100%	100%	100%	100%				
D		65%	90%	65%	20%	45%	70%	65%

Indirect costs: 25% flatrate or actual costs (accounting)
Boni (≤ 35%) : - **Permanent Structured Cooperation (PESCO)**
- (cross-border) participation of **SMEs**
- participation of **Midcaps**



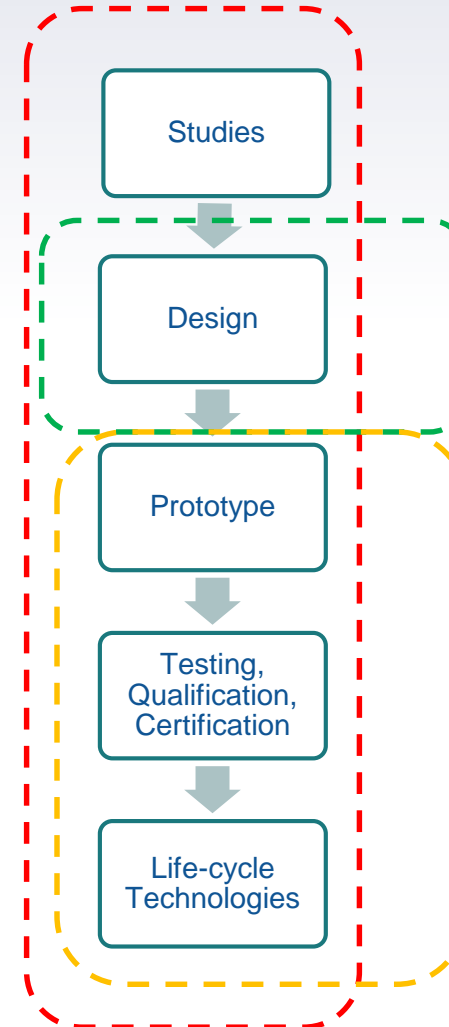
Development actions: specific requirements

Always for base funding rate < 100%:

Evidence of co-financing [e.g. Letter of Comfort / Guarantee]

Evidence of harmonized capability requirements

Evidence of MS or associated countries intention to jointly procure/use in coordinated way
Activity based on common technical specifications jointly agreed by co-funding or co-procuring MS or associated countries

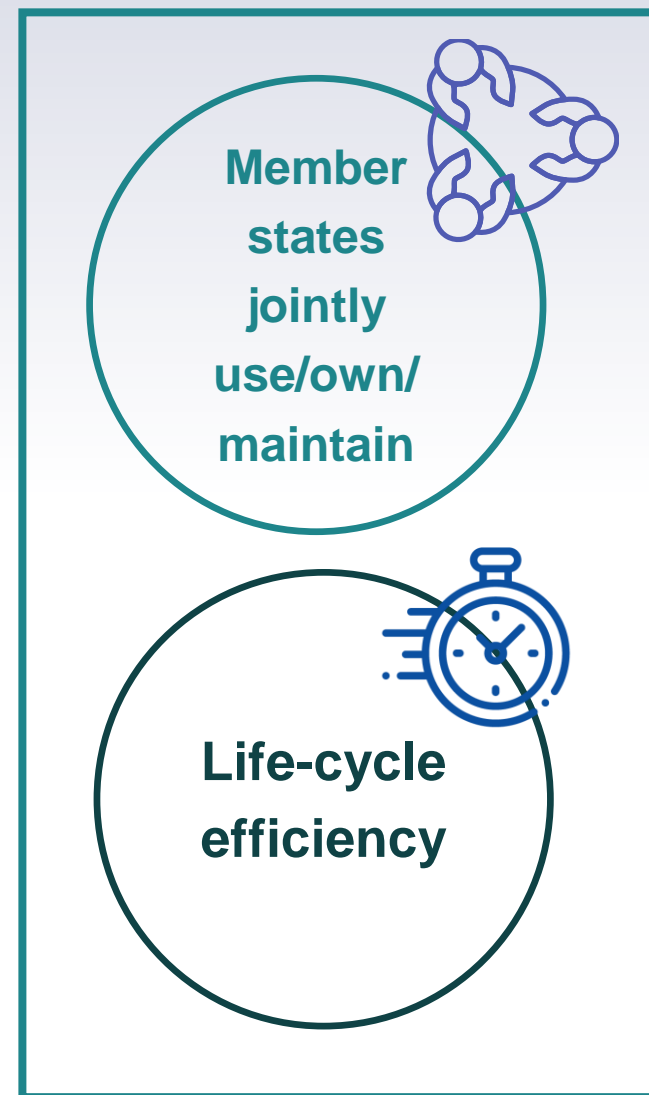




Award criteria



+ for development actions



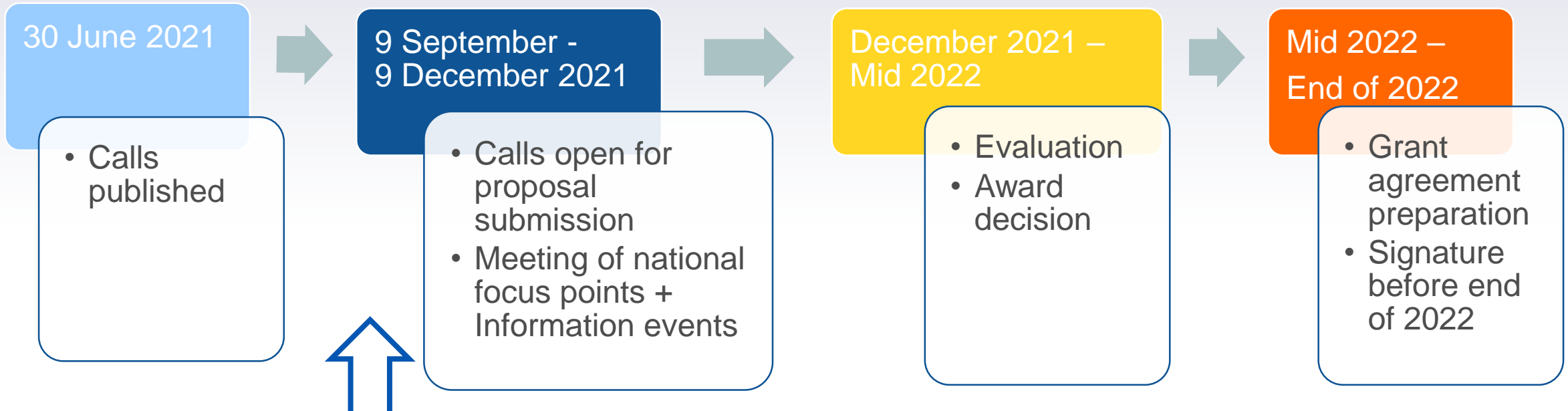


Award criteria - general comments

- Different from Horizon programmes
- Linked to EDF objectives
- Detailed description in Guide for Applicants
- 8 criteria, 2 of which only apply to development actions



Timeline of 2021 EDF calls



Check the Funding and Tender portal for the EDF 2021 calls
<https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/programmes/edf>
or
https://ec.europa.eu/defence-industry-space/funding-and-grants/space-and-defence-related-funding_en



EUROPEAN DEFENCE FUND (EDF)

23 EDF CALLS FOR PROPOSALS FOR 2021 - €1.2 BILLION



Defence medical response, Chemical Biological Radiological Nuclear (CBRN), biotech and human factors



Space



Air combat



Information Superiority



Digital transformation



Air and missile defence



Advanced passive and active sensors



Energy resilience and environmental transition



Ground combat



Cyber



Materials and components



Force protection and mobility



Naval combat



Disruptive technologies



Open calls for innovative defence technologies



Overview on calls (shortened titles)

Nomenclatur: EDF-2021-CAT-R/D-Topic

Categories of actions	Research		Development	
	Call budget	Call topics	Call budget	Call topics
MCBRN: Defence medical support, CBRN, biotech and human factors	18,5	CBRNDIM: Detection, Identification and monitoring	50	MCM: Defence Medical Countermeasures
C4ISR: Information superiority			70	HAPS: High altitude platform systems
				COMS: robust communication
SENS: Advanced passive and active sensors	38	IRD: infrared detectors		
		RADAR		
CYBER	13,5	CDAI: Cyber Defence and Incidence Management	20	IECTE: Improved Efficiency of Cyber Trainings & Exercises
SPACE			50	SNGS: NAVWAR, surveillance
				EPW: European Protected Waveform



Overview on calls

Categories of actions	Research		Development	
	Call budget	Call topics	Call budget	Call topics
DIGIT: Digital transformation	18,5	FL: Frugal Learning (AI)	40	MDOC: Multi-Domain Operations cloud
ENERENV: Energy resilience and environmental transition			133	EEMC: Energy independent and efficient systems for military camps
				NGES: Energy storage for military FOB
				PES: air combat system propulsion
MATCOMP: Materials and components	40	PHE: materials and structures for enhanced protection		
		RF		
AIR: Air combat	40	NGRT: rotorcraft technologies	150	EPE: enhanced pilot environment
				CAC: interoperability standard for air combat



Overview on calls

Categories of actions	Research		Development	
	Call budget	Call topics	Call budget	Call topics
AIRDEF: Air and missile defence			100	EATMI: endo-atmospheric interceptor
GROUND: Ground combat	10	IW: improved warheads	150	FMGV: modular ground vehicle
				UGVT: unmanned ground vehicle technologies
				3CA: BLOS close combat architecture
PROTMOB: Force protection and mobility			50	SS: soldier system demonstrator
				DMM: Digital system for military mobility
NAVAL: Naval combat	29	DSSDA: Digital Ship and ship digital architecture	60	MMPC: Modular and multirole patrol corvette
	14,5	SSHM: Ship structural health monitoring		



Overview on calls

Categories of actions	Research		Development	
	Call budget	Call topics	Call budget	Call topics
DIS: Disruptive technologies	60 (4 per action)	QSENS: Quantum technologies		
		NLOS: non-line-of-sight optical sensors		
		OTHR: over-the-horizon-radar applications		
		AMD: additive manufacturing		
OPEN: Open calls for innovative and future-oriented defence solutions	10 (4 per action)	RDIS-open: disruptive technologies	36 (4 per action)	SME
	17,5 (4 per action)	SME <i>Research organizations may join (up to 40% of contribution)</i>		

Funding and tender portal:

<https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/programmes/edf>





Inclusion of SMEs in EDF

- Dedicated open calls for SMEs
- SME bonus & award criterion
- Connecting SMEs with wider defence community



Dedicated open calls for SMEs

Separate open calls, focused on SMEs:

1. **Research** on innovative and future-oriented defence solutions

- Consortium of SMEs and research organisations
- Up to 40% of funding can go to research organisations
- Successful SME beneficiaries may be offered Business Coaching
- EU contribution ceiling set to € 4 million per proposal
- Total EU contribution up to € 17.5 million



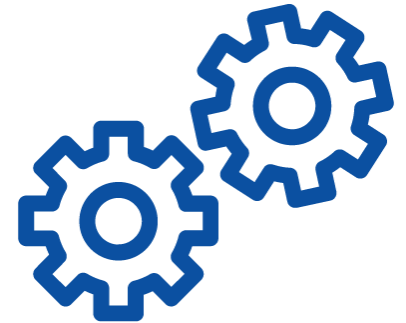


Dedicated open calls for SMEs

Separate open calls, focused on SMEs:

2. Development of innovative and future-oriented defence solutions

- Only SMEs can be beneficiaries
- Up to 30% funding in subcontracting per beneficiary
- Successful SME beneficiaries may be offered Business Coaching
- EU contribution ceiling set to € 4 million per proposal
- Total EU contribution up to € 36 million





SME Outreach activities

- Enterprise Europe Network
- European Network of Defence-related Regions
- Network of National Focal Points (*in development*)
- Commission EDF Info Day & National EDF Info Days
- Participation to exhibitions



Enterprise Europe Network

Sector Group Aeronautics, Space & Defence

- Focal point within EEN on Defence
- Support innovative SMEs to reach out to defence community
- Chair: Emilien Watelet (emilien.watelet@id2move.eu)
- Group members: <https://een.ec.europa.eu/groups/4725/members>

Commission provides info-sessions and materials to EEN:



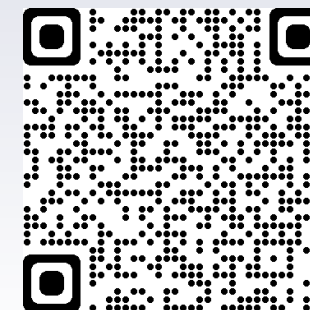


Objectives:

- **Bring together regional organisations and clusters to exchange good practices in**
 - integrating dual-use (defence-related) into their regional development strategies, in particular into Research and Innovation Smart Specialisation Strategy (RIS3)
 - supporting defence-related SMEs
- **Inform regional organisations and clusters about funding opportunities**
 - so that they can in turn provide information and guidance to SMEs
- **Promote the regional clusters of excellence**



European Network of Defence-related Regions



www.endr.eu



ENDR Events

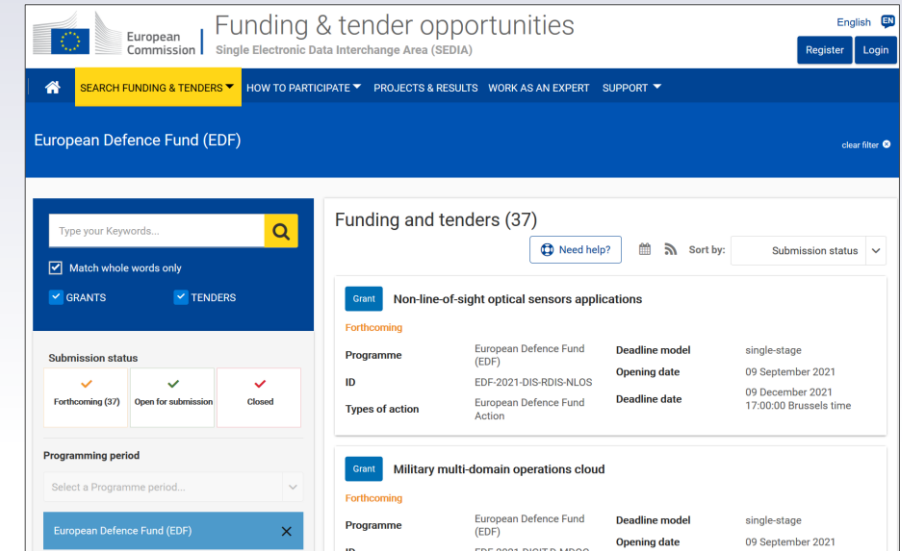


- › Drones and counter drones for defence. Trends, opportunities and solutions. Le Havre (FR), 7-8 October 2021
- › Advanced materials for defence applications. Gothenburg (SE), 12-13 October 2021
- › Future skills for aerospace and defence industry. Rzeszow (PL), 21-22 October 2021
- › Soldier of the future – Interconnectivity between defence, space and cyber technologies. Copenhagen (DK), 9-10 November 2021



Submission in 2021

- Submission itself and supplementary forms and files on:
 - [Funding & tenders portal \(europea.eu\)](https://europea.eu)
- Calls are open from 9 September to 9 December 2021
- Supporting and required material *before* 9 September should be downloaded from:
 - [European Defence Fund – EDF 2021 calls documentation, submission forms and guidance \(europea.eu\)](https://europea.eu)
- Relevant guides will become available on portal





Submission in 2021

- Part A , administrative
 - Online format
- Part A sup (docx), Supplementary information - EDF specific provisions
 - Separate file, to be uploaded with the online submission
- Part B (docx), description of the proposal
 - Separate file, to be uploaded with the online submission



Submission in 2021

- All annexes to be submitted with the online A-form
- Annex 1 & 2 - Budget tables (xlsm)
- Annex 3 - Declaration of honour (DoH) applicants and affiliated entities
- Annex 4 - IPR on background information (docx)
- Annex 5 - Industry related information (xlsx)
- Annex 6 - Declaration of ownership and control (xlsm)
- Annex 7 - Operational capacity and resources (docx)
- Annex 8 - Mid-cap self-assessment form (xlsm)



Documents to check

- Conditions of the call:
 - admissibility, eligibility
 - Type of action and requested/eligible activities
 - award criteria and funding rate
- Guide for applicants
- Guidance: 'how to complete your ethics self-assessment'
- Programme Security Instruction



Ethics in the EDF

Ethical by
Design

- Applicants are invited to submit an ethics-compliant proposal
- Ethics inputs
 - Part A-sup of submission form: **ethics self-assessment**: based on an **ethics issues table** with 10 questions and sub-questions
 - Only those issues relevant and applicable to the proposal require further inputs.
 - Includes items concerning both the content of the activity (*what*) and the performance of the activity (*how*)
 - Risk mitigation actions and proof of permissions/certificates/licences where applicable.
 - References to part B of the submission form (technical proposal) where needed
 - Ethics guidance to help complete the ethics table

Guidance on how to complete your ethics self-assessment.



Security aspects

..... pursuant to article 27(4) of the EDF Regulation, **Member States on whose territory the 'beneficiaries' are established may decide on a specific security framework** for the protection and handling of classified information relating to the action Such a security framework must be without prejudice to the possibility for the Commission to have access to necessary information for the implementation of the action.



- The classification of foreground information generated during the implementation of the Grant Agreement shall be under national legal framework. Classification Markings shall be in accordance with national rules.
- Project Security Instructions, Security Classification Guide and the Security Scrutiny of the project's deliverables, shall be prepared by the concerned Member States security authorities.
- The Security Aspects Letter, as integral part of the Grant Agreement, shall include those documents.



Security aspects

.....*If no such specific security framework is set up by those Member States, **the security framework will be put in place by the Commission** in accordance with Commission Decision (EU, Euratom) 2015/444 on the security rules for protecting EU classified information ('Decision 2015/444').*



- The classification of foreground information generated during the implementation of the Grant Agreement shall be under EU legal framework. Classification Markings shall be European Union Classified Information (EUCI). (example: RESTREINT EU/EU RESTRICTED)
- Project Security Instructions, Security Classification Guide and the Security Scrutiny of the project deliverables, shall be prepared by the European Commission. The security scrutiny of the project's deliverables will be conducted with the assistance of security experts from the Members States on whose territory the beneficiaries are established.
- The Security Aspects Letter, as integral part of the Grant Agreement ,shall include those documents.

The applicable security framework for the action has to be in place at the latest before the signature of the 'Grant agreement'.



Register as an expert

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SEARCH FUNDING & TENDERS | HOW TO PARTICIPATE | PROJECTS & RESULTS | **WORK AS AN EXPERT** | SUPPORT

European Defence Fund (EDF) | clear filter

Work as an expert | Need help?

The European Union Institutions appoint external experts to assist in the evaluation of grant applications, projects and tenders, and to provide opinions and advice in specific cases.

Being an expert for the European Com...

In particular, experts assist in:

- Evaluation of proposals, prize applications and tenders
- Monitoring of actions, grant agreements, public procurement contracts

In addition, experts provide opinion and advise on:

- Preparation, implementation and evaluation of EU programmes and design of policies.

In order to select experts, the European Union Institutions publish regularly calls for expression of interest (see list below) detailing the selection criteria, the required expertise, the description of the tasks, their duration and the conditions of remuneration.

Interested? Please join the database of external experts!

Register as expert

As new expert, you will be first requested to create your...

News

18 Jul, 2021
Horizon Europe: key changes to the Ethics Appraisal Process
The recording of the training session on the key changes to the Ethics Appraisal Process in Horizon Europe, identifying serious and complex issues in EU-funded ...

15 Feb, 2021
INEA looking for experts to assess CEF Energy calls
The Innovation and Networks Executive Agency (INEA) is looking for experienced experts in energy to assess project proposals submitted under the 2021 Connecting...

All news >

Quick Links

**Get an insider's view
on the process**

You can register in the
EU experts database
at any time.

Experts needed for:

- Technical evaluation
- Ethical assessment



Useful links

- EDF
https://ec.europa.eu/defence-industry-space/eu-defence-industry/european-defence-fund-edf_en
- EDF Regulation
<https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32021R0697&qid=1621243243743&from=EN>
- DG DEFIS
https://ec.europa.eu/defence-industry-space/index_en
- Funding and Tenders portal
<https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/programmes/edf>



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INFO DAYS

European Defence Fund (EDF): Information Day & Networking Event

On 15-17 September 2021, the European Commission will organise a virtual information day and networking event for potential applicants to the European Defence Fund (EDF) 2021 calls for proposals.

[Registration](#) is open until 8 September (23.59).

The European Commission Directorate-General for Defence Industry and Space invites you to participate in the EDF information event on the 2021 calls for proposals, published on 30 June on the [Funding & tenders opportunities portal](#).

This is a **FREE** three-day virtual event that will consist of an info day to introduce the 2021 calls for proposals, explain participation modalities and present insights and expectations from the European Commission, followed by a 2-day [brokerage](#) and [matchmaking](#) event offering a unique

Defence policy

15 September 2021, 09:00 to 17 September 2021, 18:00



Questions?

Contact DEFIS-EDF-PROPOSALS@ec.europa.eu