



**EUROPEAN
DEFENCE
FUND**

EDF 2024 INFORMATION DAYS

Brussels & Online
28 - 29 May 2024

WELCOME AND INTRODUCTION

François ARBAULT
Director for Defence industry
DG DEFIS

EDF: a successful catalyst of the defence (industry) landscape

€4 billion already committed for cooperative defence R&D

EU 2nd biggest defence R&D investor in Europe

157 R&D projects (incl. EDF23)

+ 62 projects from precursors (PADR and EDIDP)

High-level of inclusiveness

~1.200 beneficiaries from all parts of the EU

~1/3 of participants SMEs

Real cooperative dimension

On average, 17 entities from 8 MS and Norway involved in an EDF project

Growing attractiveness

236 proposals submitted under 2023 calls: +76% increase

Number proposals x2 under

non-thematic SMEs and disruptive technologies calls

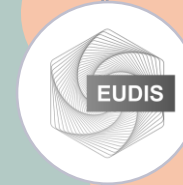


EDF-funded actions in line with EU's capability priorities



Key next-generation defence capabilities supported

Examples: space, main battle tank, strategic air transport, anti-UAVs, navy vessels



~20% of the EDF budget implemented under EU Defence Innovation Scheme

with innovative measures to support defence R&D and attract new and small players



First concrete products and systems already used by armed forces

Examples: counter naval mine solutions, unmanned ground vehicles



Part of a comprehensive EU strategy to boost defence investment

with ASAP and EDIRPA, the new European Defence Industrial Strategy (EDIS) and the newly proposed EDIP

Programme Day 1

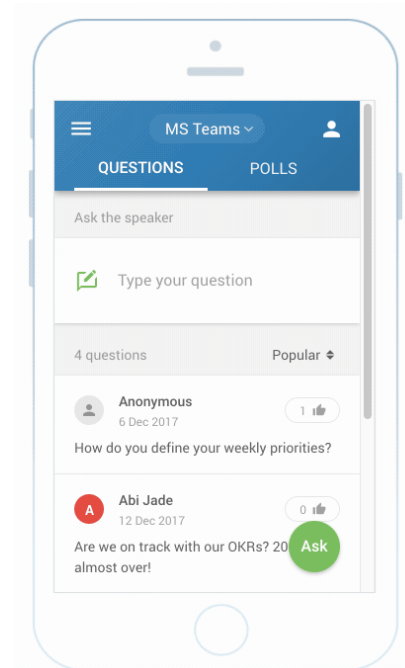
Timeslot (Brussels time)	Session title
09.30-10.00 (30')	<i>Welcome & Introduction</i>
10.00-10.30 (30')	<i>EDF key principles, incl. Q&A</i>
10.30-11.30 (60')	<i>Overview of EDF 2024 calls for proposals, incl. Q&A</i>
11.30-12.00 (30')	<i>Coffee break</i>
12.00-13.00 (60')	<i>Evaluation of the proposals, incl. Q&A</i>
13.00-14.30 (90')	<i>Lunch break</i>
14.30-15.15 (45')	<i>Financial aspects, incl. Q&A</i>
15.15-16.00 (45')	<i>Preparation of proposals and submission process, incl. Q&A</i>
16.00-16.30 (30')	<i>Coffee break</i>
16.30-16.45 (15')	<i>Overview of available tutorials</i>
16.45-17.15 (30')	<i>What comes after the evaluation, incl. Q&A</i>
17.15-17.30 (15')	<i>EDF supporting actions, incl. Q&A</i>
17.30-17.45 (15')	<i>Concluding remarks and wrap-up</i>

Q&A Time !

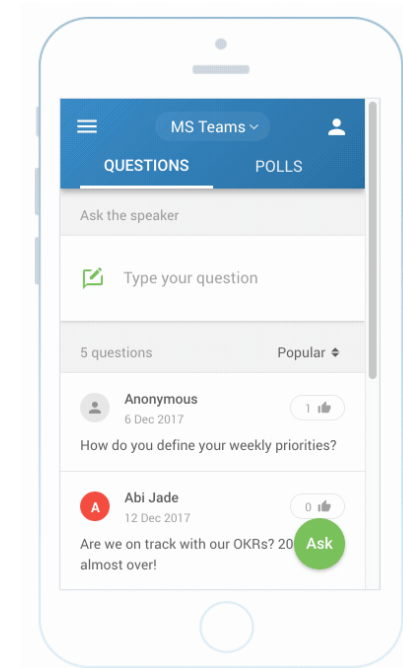


- Scan the QR code
- Enter your name & event passcode
- Ask a question!

PASSCODE:
EDF-2024



ASK A QUESTION



UPVOTE A QUESTION

EDF KEY PRINCIPLES

- EDF general presentation
- European Defence Innovation Scheme (EUDIS)

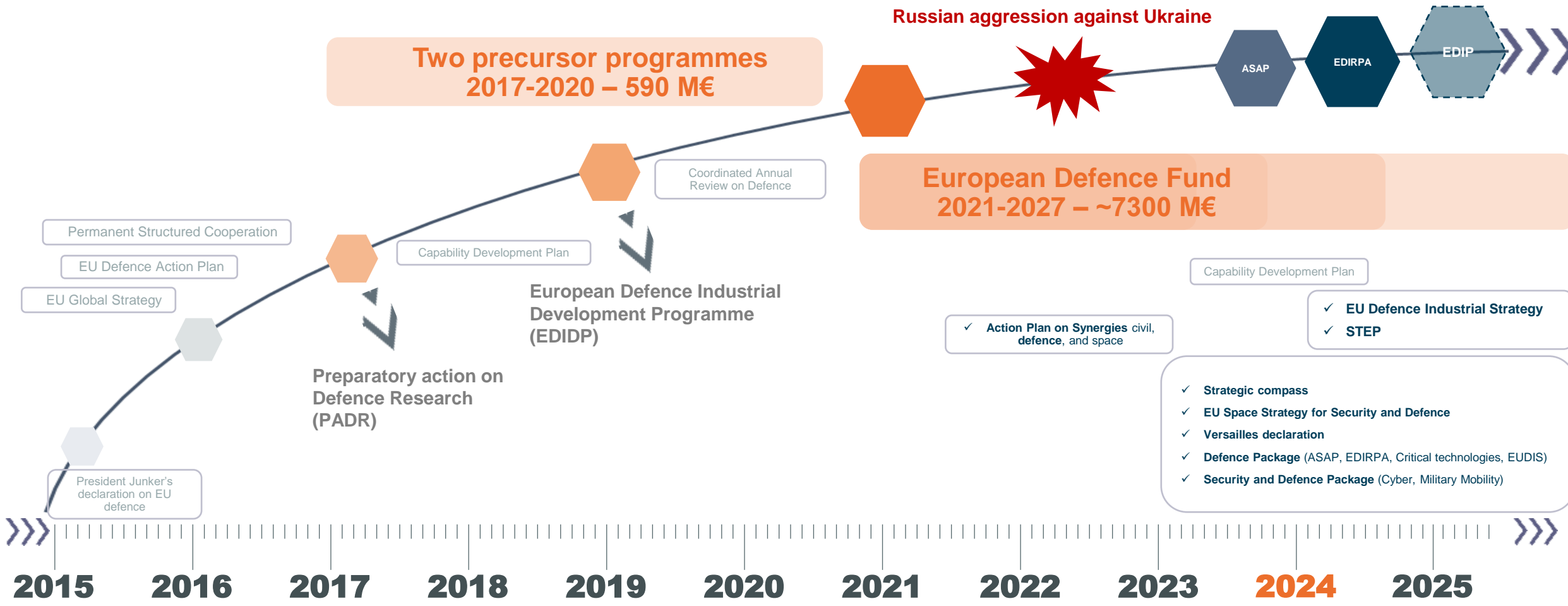
EDF general presentation

Michael ALCANTARA

DEFIS A.2

EDF Implementation –
Programming and SME support

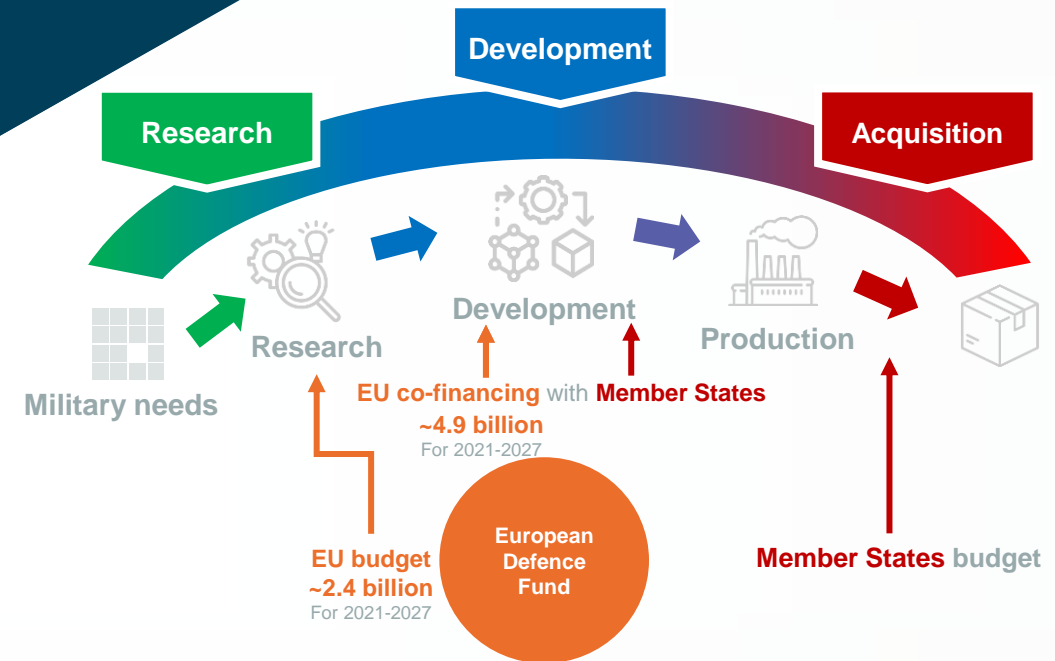
Ramping-up EU's collaborative approach to defence investment



#EUDefenceIndustry

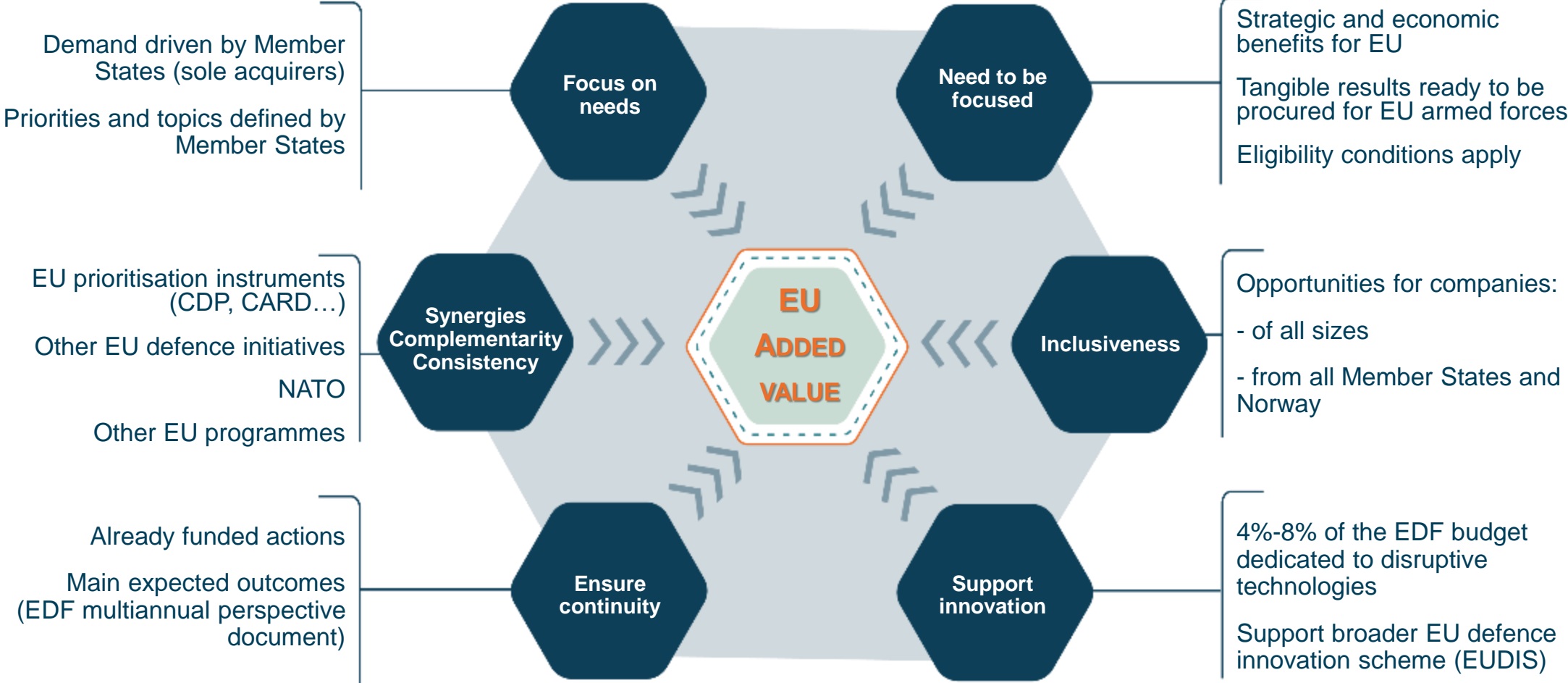
DEFENCE CROSS-BORDER R&D

European Defence Fund : The EU defence R&D programme



- **EDF financial support mainly in the form of grants**
- **Open to EU Member States and Norway**
- **Security-based participation conditions for entities controlled by third-countries**

General principles governing implementation



EDF: key enabler in larger EU eco-system

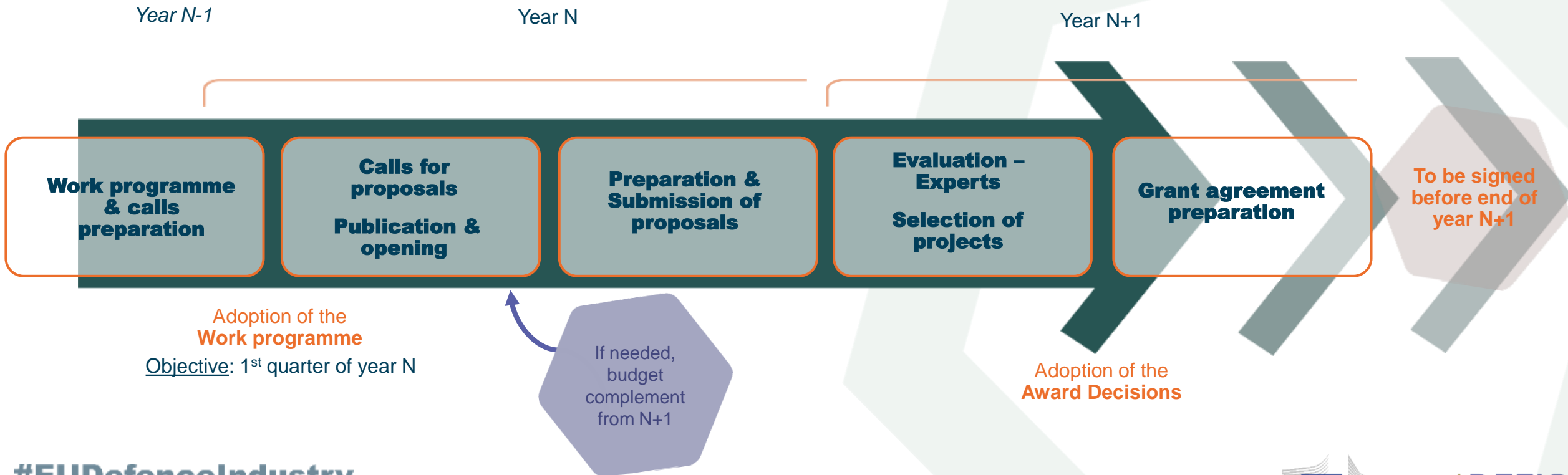
- EDF annual Work programmes **informed by:**
 - **Strategic Compass:** critical capability gaps
 - **Capability Development Plan (CDP):** commonly agreed priorities
 - **Coordinated Annual Review on Defence (CARD):** opportunities for collaborative R&D
 - **Permanent Structured Cooperation (PESCO) projects**
 - **Synergies and complementarity** with other EU programmes
- EDF programming **informed by MS/NO co-financing & planning**, including regarding their NATO commitments (synergies and complementarity)



EDF Life-cycle

Annual work programmes and calls for proposals + indicative **multiannual perspective**

Member States (“EDF Programme Committee”) to validate the annual **work programme** (WP) and the **selection of projects** (awards) to be funded following the calls for proposals



EDF Categories of Actions

Addressed by annual work programmes & calls for proposals



-  **Medical response, CBRN & human factors**
-  **Information superiority**
-  **Sensors**
-  **Cyber**
-  **Space**
-  **Digital transformation**
-  **Energy resilience & environmental transition**
-  **Materials and components**

-  **Air combat**
-  **Air and Missile defence**
-  **Ground combat**
-  **Force protection and mobility**
-  **Naval combat**
-  **Underwater warfare**
-  **Simulation and training**



Horizontal categories

-  **Disruptive technologies**
-  **Innovative defence technologies (SMEs)**



EDF Multiannual perspective

- **Indicative document** (no commitment) prepared and reviewed each year in line with annual work programmes
- Presents a longer-term perspective than annual work programmes → **Predictability**
- Introduces the expected collective landing zone in terms of outcomes → **Visibility and output orientation**
- Supports **coordination** between Member States/Norway and industries

For each category of action

Main outcomes
Rationale

Main
expected
outcomes

Budget
distribution

overall budget allocation

EDF in perspective

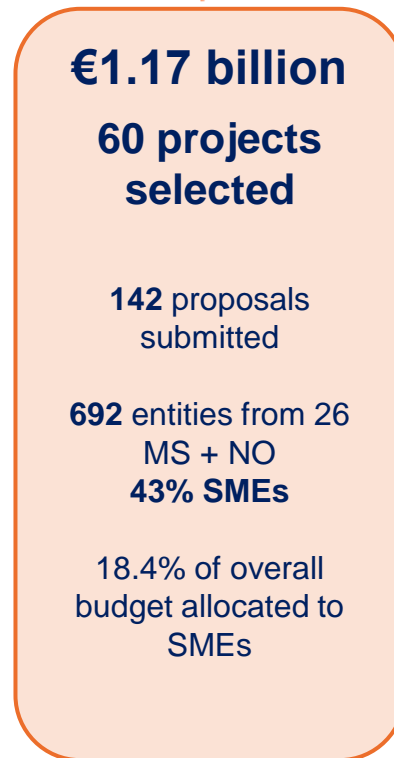
Since the adoption of EDF Regulation in May 2021:

- €2 billion in signed grant agreements
- More than €3 billion in awarded projects
- More than €4 billion programmed/committed
- Programming advanced for the 5th WP (EDF25)

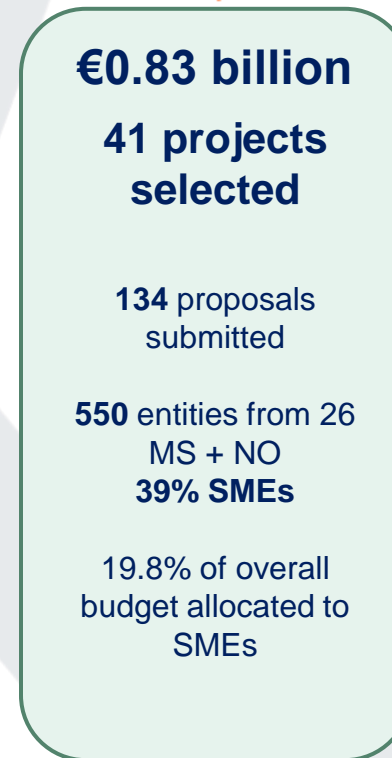
On top of:

- PADR 2017-2019 – €90 M; 18 projects
- EDIDP 2019-2020 – €500 M; 44 projects
- ASAP – €513 M; 31 projects
- EDIRPA – calls open; €310 M

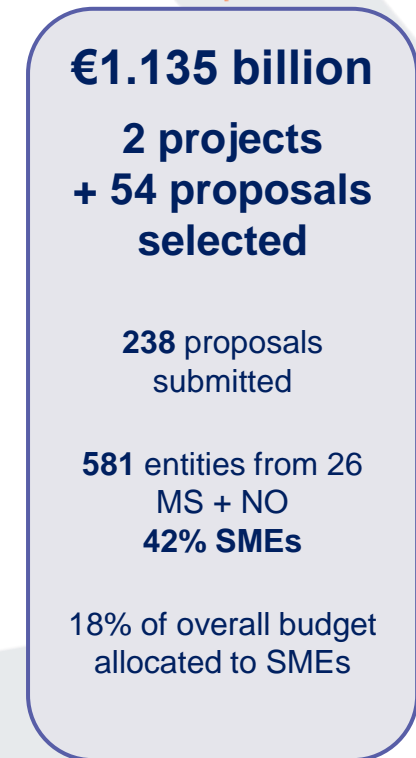
EDF 2021



EDF 2022



EDF 2023



In average, 17 entities from 8 Member States and Norway involved in a single project
Overall, entities from 26 Member States and Norway

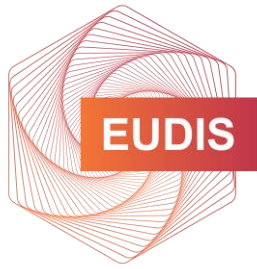


EUDIS

EU DEFENCE INNOVATION SCHEME

Nynke Tigchelaar

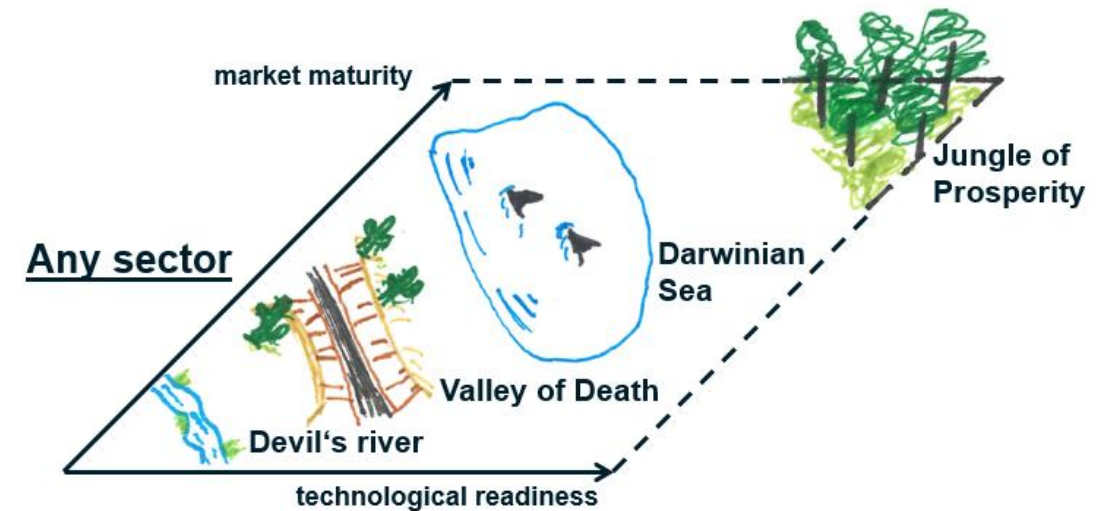
Head of Unit
DEFIS A.3, EDF Implementation – Defence
Technologies and Innovation

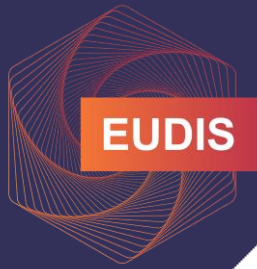


EU Defence Innovation Scheme

A stronger defence innovation ecosystem

- **Focus on SMEs, including start-ups and non-traditional players** in defence industrial ecosystem
- Tap into the full **potential of defence & civil** innovation communities
- Many opportunities, depending on **innovation maturity level**
- An investment ambition close to **€ 2 Bn until 2027**
- **Five tracks** combine different approaches to call organisation & SME support services
- **Integrated in the EDF**
- Aims to reach **up to 400 SMEs** annually





FIVE EUDIS INNOVATION TRACKS

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CHALLENGE YOUR IDEA

53 M€

- Defence Hackathon
- Two Technological Challenges on Space and Advanced Active & Passive Sensors



EMPOWER SMEs

112 M€

- Open SME R&D calls (67 M€)
- Research calls for disruptive technologies (40 M€)
- Business coaching for grant receivers (1.6 M€)
- Business Accelerator & Matchmaking (3.2 M€) upcoming in 2025



ACCELERATE YOUR INNOVATION

15 M€

- Simulation & Training - A selected consortium invites individual SMEs and start-ups for targeted acceleration services



225 M€
2024



IMPROVE ACCESS TO FINANCE

20 M€

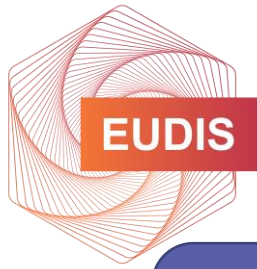
- Defence Equity Facility, implemented by the European Investment Fund



MIGRATE YOUR INNOVATION FROM CIVIL TO DEFENCE

25 M€

- Materials & components



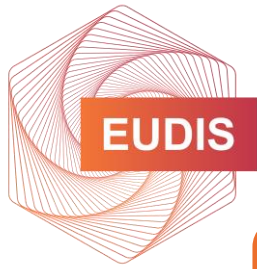
EUDIS

Annual Defence Hackathon & Mentoring

INFO
DAYS | 20
24

- To discover innovative solutions for defence, attract skills to the defence sector, foster and bridge various communities with each other
 - Two Annual Events: Defence Hackathon (Spring) & Space for Defence Hackathon (Autumn)
-
- **Where:** Athens, Brussels, Budapest, Klaipeda, Krakow & Milan
 - **When:** 31 May – 2 June 2024
 - **Topic:** DIGITAL IN DEFENCE - 3 challenges:
 - Sub-sea infrastructure protection;
 - Improving situation awareness;
 - Cyber security
 - **Award:** Mentoring programme of 100 hours to the winning teams
 - **Still possibilities to register:** <https://eudis-hackathon.eu/>





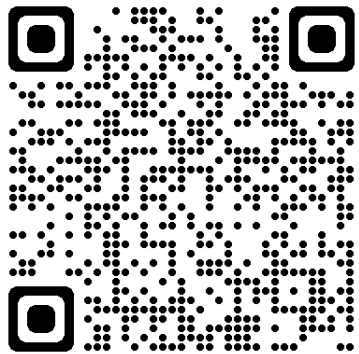
EUDIS

Defence Equity Facility

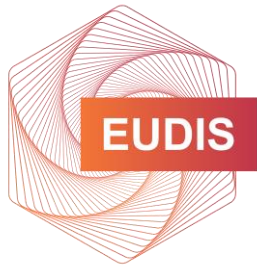
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Fund of Funds stimulating the development of an ecosystem of European private funds supporting defence innovation.

For Venture Capital & Private Equity Fund Managers

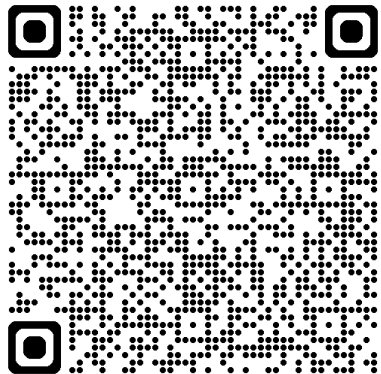


- EDF will support investments made by the **European Investment Fund (EIF)** into private funds.
- The funds are expected to focus on innovative SMEs (including start-ups) and small midcaps developing **technologies with both civilian and defence applications.**
- Financing: **€175 million until 2027**
- By taking cornerstone positions in the funds, **the EIF will act as key investor** and help crowding-in additional investors.
 - EDF Info Day **Investor Sessions** on 29 May 2024



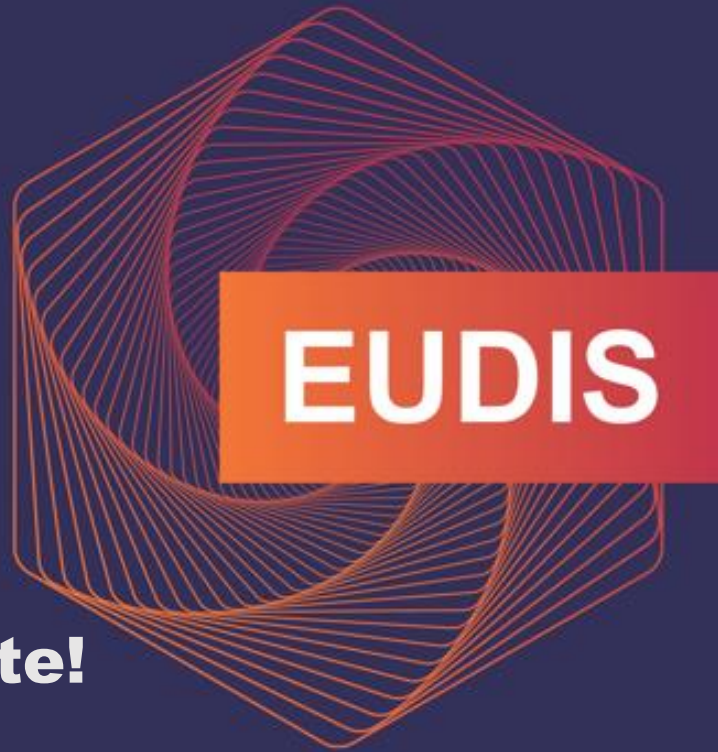
EUDIS Business Accelerator and Matchmaking

Open Call for
a Framework Contract for
EUDIS Business Accelerator
and Matchmaking (BAMM).
Deadline: 19 August 2024



- The ceiling covering all purchases is **€30 million (2024-2028)**
- The BA pilot year **starts in 2025** to support **20** start-ups/scale-ups by coaching on defence and business. Seed funding of **€65 000** per company.
- The BA will entail increased financial support in the coming years
- Matchmaking will support the implementation of the Defence Equity Facility
- The maximum total value for the first BAMM Specific Contract is **€3,2 million**

➤ More information: EDF Info Day **Session on EUDIS Business Accelerator and Matchmaking** on 29 May at 14.00-14.45



Visit our website!



eudis.europa.eu

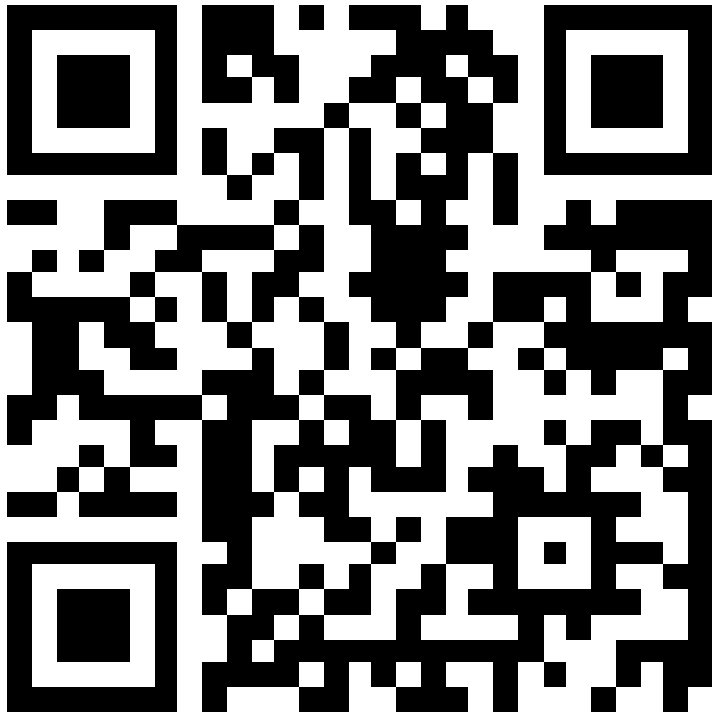


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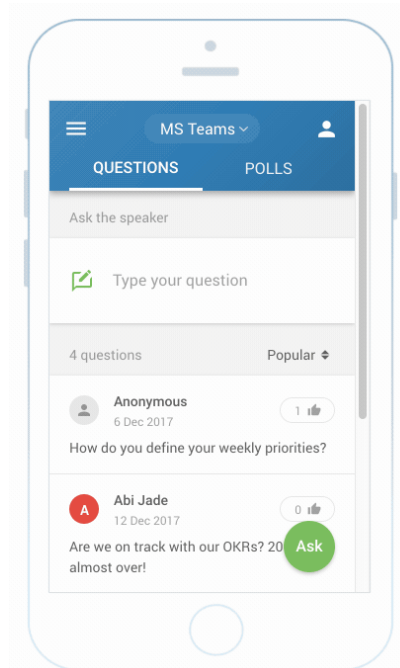
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Q&A Time !

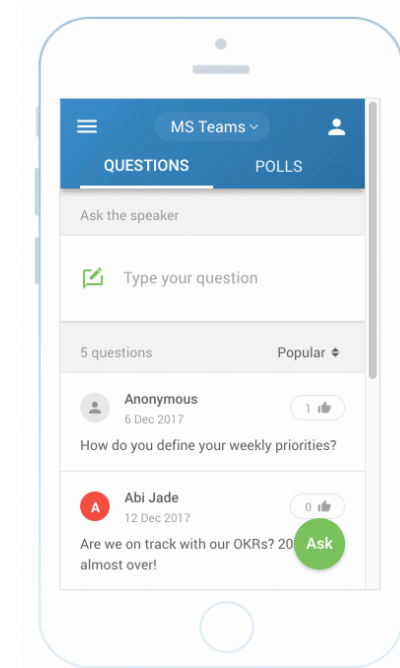


PASSCODE:
EDF-2024

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ASK A QUESTION



UPVOTE A QUESTION

OVERVIEW OF EDF 2024 CALLS FOR PROPOSALS

- Structure of the calls and topics
- Content of the different calls
 - EDF-2024-DA
 - EDF-2024-DA-EUCI
 - EDF-2024-RA
 - EDF-2024-RA-SI
 - EDF-2024-LS-RA-CHALLENGE
 - EDF-2024-LS-RA-DIS
 - EDF-2024-LS-RA-SMERO
 - EDF-2024-LS-DA-SME

Structure of the calls and topics

Erno VANDEWEERT

Deputy Head of Unit DEFIS A.4

EDF Implementation – Defence systems

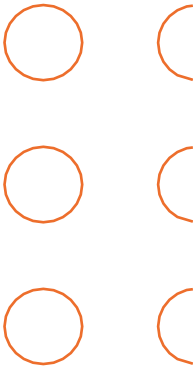
EDF Categories of Actions

Addressed by annual work programmes & calls for proposals





-  **Medical response, CBRN & human factors**
-  **Information superiority**
-  **Sensors**
-  **Cyber**
-  **Space**
-  **Digital transformation**
-  **Energy resilience & environmental transition**
-  **Materials and components**

-  **Air combat**
-  **Air and Missile defence**
-  **Ground combat**
-  **Force protection and mobility**
-  **Naval combat**
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Horizontal categories

-  **Disruptive technologies**
-  **Innovative defence technologies (SMEs)**



EDF Work Programme 2024

EUR ~1.10 billion

INFO DAYS | 2024

34 topics

Opening of the calls: 20 June 2024

Deadline for submission: 5 Nov. 2024 17.00 CET

 Medical Response & CBRN	<ul style="list-style-type: none"> SGA under FPA on medical countermeasures*   SGA under FPA on medical countermeasures*  	15 M€ 10 M€	 Air & missile defence	<ul style="list-style-type: none"> Countering Hypersonic glide vehicles 	78 M€
 Information superiority	<ul style="list-style-type: none"> AI-based multifunctional aperture and transceiver  Defence multi-dimensional communication standard  Small UAS  MALE RPAS 	45 M€ 25 M€ 11 M€ 100 M€	 Ground combat	<ul style="list-style-type: none"> Intelligent weaponry and ammunition systems Unmanned ground systems  Beyond the line-of-sight close combat Armoured infantry fighting vehicle 	30 M€ 50 M€ 25 M€ 25 M€
 Sensors	<ul style="list-style-type: none"> Advanced radar technologies Multi-sensors integration for autonomous drone navigation (challenge, 2 topics) 	35 M€ 27 M€	 Protection & Mobility	<ul style="list-style-type: none"> Future mid-size tactical cargo aircraft 	30 M€
 Cyber	<ul style="list-style-type: none"> Federated cyber ranges  	48 M€	 Naval combat	<ul style="list-style-type: none"> Functional smart system-of-systems under integral survivability approach for future naval platforms 	45 M€
 Space	<ul style="list-style-type: none"> Multi-source satellite image analysis (challenge, 2 topics) Secure waveform for satellite communications  	25 M€ 25 M€	 Underwater warfare	<ul style="list-style-type: none"> Secured/adaptive underwater communications for UUVs  Autonomous heavy minesweeping system 	24 M€ 30 M€
 Digital transformation	<ul style="list-style-type: none"> Automated structural modelling for effect prediction 	15 M€	 Simulation & training	<ul style="list-style-type: none"> Methods for bridging reality gaps (cascade funding)  Simulation and training for medical emergencies  	15 M€ 10 M€
 Energy & Environment	<ul style="list-style-type: none"> Energy-independent and energy-efficient systems for military camps  	40 M€	 Disruptive technologies	<ul style="list-style-type: none"> Quantum technologies  Non-thematic research 	24 M€ 16 M€
 Materials & Components	<ul style="list-style-type: none"> Electronic components (spin-in)  	25 M€	 SMEs	<ul style="list-style-type: none"> Non-thematic research for SMEs and ROs Non-thematic development for SMEs 	34 M€ 33 M€
 Air combat	<ul style="list-style-type: none"> Advanced air-to-air missiles Unmanned collaborative combat aircraft systems  Next generation rotorcraft 	35 M€ 15 M€ 100 M€	 Others	<ul style="list-style-type: none"> External expertise, audits, studies, IT, indirect management Business coaching for SMEs Blending facility for equity funding for SMEs/Mid-Caps Business accelerating services Matchmaking events for investors and SMEs EDF hackathon events 	7.6 M€ 1.6 M€ 20 M€ 2.6 M€ 0.6 M€ 1.2 M€

#EUDefenceIndustry

* subject to restricted calls

Legend: **Research** **Development** **EUDIS-related**  **STEP**

27



DEFIS

EDF 2024 Call structure

Type of Action and Type of Model Grant Agreement as central elements in Work Programme structuring (*e-grants*)

<p>Type of Action</p>	<ul style="list-style-type: none"> ○ EDF-RA: European Defence Fund - Research Action ○ EDF-LSRA: European Defence Fund - Lump Sum-Research Action ○ EDF-DA: European Defence Fund - Development Action ○ EDF-LSDA: European Defence Fund - Lump sum-Development Action ○ EDF-RA-SGA: European Defence Fund - Specific Grant Agreement*
<p>Type of Model Grant Agreement</p>	<ul style="list-style-type: none"> ○ EDF-AG: European Defence Fund - Action Grant ○ EDF-AG-LS: European Defence Fund - Action Grant-Lump Sum
<p>Legibility</p>	<ul style="list-style-type: none"> ○ Policy objectives pursued ○ Set of homogenous eligibility conditions


8 competitive calls

- EDF-2024-RA
- EDF-2024-RA-SI
- EDF-2024-LS-RA-CHALLENGE
- EDF-2024-LS-RA-DIS
- EDF-2024-LS-RA-SMERO
- EDF-2024-DA
- EDF-2024-DA-EUCI
- EDF-2024-LS-DA-SME

2 restricted calls

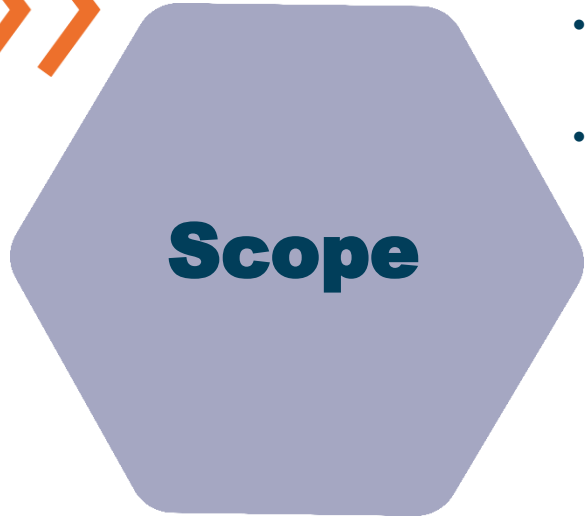
- EDF-2024-RA-SGA (EDF-2022-FPA-MCBRN-MCM)
- EDF-2024-DA-SGA (EDF-2022-FPA-MCBRN-MCM)

*SGA awarded without call for proposals in relation to a Framework Partnership Agreement (FPA)

- Each proposal shall be submitted against one topic
- Each topic is structured in sections
 - Objectives (General/Specific) } Context setting and description of problem/shortfall to be solved/addressed (capability, technology, operational,...)
 - Scope }  **Mandatory unless otherwise specified in the text**
→ Eligibility of the action
 - Types of activities (*) }
 - Functional requirements } Compliance evaluated in award criteria
 - Expected impact }

(*) Article 10(3) of EDF regulation: a) generating knowledge; b) integrating knowledge; c) studies; d) design; e) prototyping; f) testing; g) qualification; h) certification; i) increasing efficiency

Scope & Type of activities



- Main expected action **objective/output(s)**
- Key specificities and features (functions /subsystems, operational environment and platforms....)



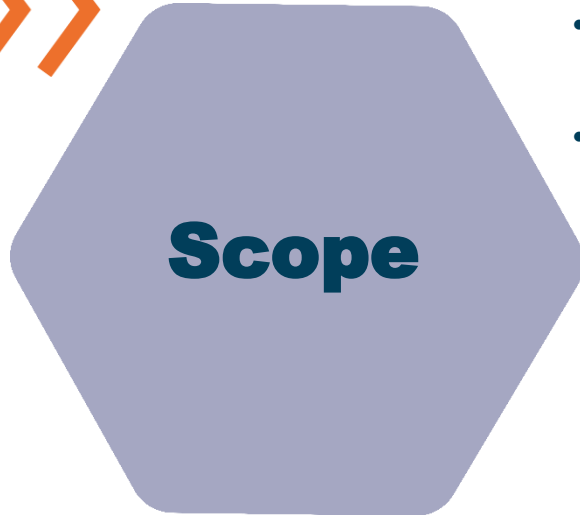
- Mandatory/optional subset per topic / type of action
- Implementation options: specific deliverables/tasks, expected functions, targeted demonstrators or prototypes, testing features...
- Note: Optional activities/tasks taken into account in award criteria

Examples

Research



Scope & Type of activities



- Main expected action **objective/output(s)**
- Key specificities and features (functions /subsystems, operational environment and platforms....)



- Mandatory/optional subset per topic / type of action
- Implementation options: specific deliverables/tasks, expected functions, targeted demonstrators or prototypes, testing features...
- Note: Optional activities/tasks taken into account in award criteria

Examples

Development

Integrating knowledge	} Optional activities
Studies	
Design	} Mandatory activities
Prototyping	
Testing	} Optional activities
Qualification	
Certification	
Increasing efficiency	



Functional Requirements

- Specific technical requirements
- Components/functionalities/capacities to be included
- Standards and interfaces to be addressed
- SWAP (Size, Weight, Power Consumption) and other performances (e.g. range)
- *Note: Not defined for “non-thematic” topics*

Taken into account as part of the award criteria

Expected Impact

- Contribution to specific defence capabilities and/or strategic objectives
- EU Industrial and Market Competitiveness
- EU Strategic autonomy (supply chain, security of supply)
- Interoperability
- Technological progress
- ...



Content of the calls

- EDF-2024-DA
- EDF-2024-DA-EUCI
- EDF-2024-RA

João ABREU

Programme Manager DEFIS A.4
EDF Implementation – Defence systems

Gustaf WINROTH

Deputy Head of Unit DEFIS A.3
EDF Implementation – Defence
Technologies and Innovation

EDF-2024-DA: Call for 'thematic' EDF development actions implemented via actual cost grants

Type of action:
EDF-DA: Development Action

Number of topics: 14

Type of grant:
EDF-AG: Action Grant

CALL ID

EDF-2024-DA

TOPIC ID

EDF-2024-DA-C4ISR-AIMA-STEP EDF-2024-DA-GROUND-BLOS
EDF-2024-DA-C4ISR-COMS-STEP EDF-2024-DA-GROUND-AIFV
EDF-2024-DA-C4ISR-SEEU-STEP EDF-2024-DA-NAVAL-FNP
EDF-2024-DA-C4ISR-MALE EDF-2024-DA-UWW-AHMS
EDF-2024-DA-CYBER-NGCR-STEP EDF-2024-DA-SIMTRAIN-STME-STEP
EDF-2024-DA-SPACE-EPW-STEP
EDF-2024-DA-ENERENV-EEMC-STEP
EDF-2024-DA-AIR-NGRT
EDF-2024-DA-GROUND-UGS-STEP

BUDGET

579 M€



EDF-2024-DA: Topics (1/3)

Topic/Budget	Title	Scope*	Mandatory types of activities	Expected # projects funded
EDF-2024-DA-C4ISR-AIMA-STEP 45 M€	AI-based multifunctional aperture and transceiver	New generation of scalable and cognitive multifunctional software defined transceiver for military manned and unmanned platforms	Studies, Design, Prototyping, Testing	1
EDF-2024-DA-C4ISR-COMS-STEP 25 M€	Defence multi-dimensional communication standard	Development of 5G services for military applications	Studies, Design, Prototyping, Testing	1
EDF-2024-DA-C4ISR-SEEU-STEP 11 M€	Small enhanced European UAS	Development of a small UAS with advanced ISTAR capabilities, such as real-time imagery intelligence, and possibly kinetic capabilities	Studies, Design, Prototyping, Testing	1
EDF-2024-DA-C4ISR-MALE 100 M€	Medium altitude long endurance RPAS	Prototype of a fully European MALE RPAS with an innovative ISTAR capability and design and prototype of a common sensor pod	Studies, Design, Prototyping, Testing	1
EDF-2024-DA-CYBER-NGCR-STEP 48 M€	Next-Generation Cooperative Cyber Range	Set up of trainings and exercises: cross-border exercises, entire chain of cyber defence operations, leverage AI and digital twins	Studies, Design, Prototyping, Testing, Qualification	1
EDF-2024-DA-SPACE-EPW-STEP 25 M€	Secure waveform for satellite communications	System prototyping of the baseband equipment (satellite modem), the on-board satellite active transponder and ancillary systems for operating the EPW	Prototyping, Testing	1

EDF-2024-DA: Topics (2/3)

Topic/Budget	Title	Scope*	Mandatory types of activities	Expected # projects funded
EDF-2024-DA-ENERENV-EEMC-STEP 40 M€	Energy-independent and energy-efficient systems for military camps	Full-scale demonstrator of a deployable camp, with a modular and easily deployable energy system and adaptable energy mix	Studies, Design, Prototyping, Testing, Qualification	1
DF-2024-DA-AIR-NGRT 100 M€	Next generation rotorcraft	Future technologies and architectures for the next European generation of rotorcraft by 2030	Studies, Design, Increasing Efficiency	1
EDF-2024-DA-GROUND-UGS-STEP 50 M€	Multipurpose unmanned ground systems	Development of a multipurpose UGS of systems with lethal effectors and solutions for systems integration and manned-unmanned teaming	Studies, Design, Prototyping, Increasing Efficiency	1
EDF-2024-DA-GROUND-BLOS 25 M€	Beyond the line-of-sight close combat	Development and integrate innovative technologies of interest to improve the performance of BLOS capability	Integrating knowledge, Studies, Design	1
EDF-2024-DA-GROUND-AIFV 25 M€	Next generation armoured infantry fighting vehicle	Upgrade of current AIFV and the development of next generation AIFV technologies	Design, Prototyping	1
EDF-2024-DA-NAVAL-FNP 45 M€	Functional smart SoS under an integral survivability approach for future naval platforms	Definition of common operational requirements of the essential elements for future European naval platforms	Integrating knowledge, Studies, Design	1

EDF-2024-DA: Topics (3/3)

Topic/Budget	Title	Scope*	Mandatory types of activities	Expected # projects funded
EDF-2024-DA-UWW-AHMS 30 M€	Autonomous heavy minesweeping system	Studies and design for minesweeping systems with autonomous features for open-sea mines targeting large vessels	<i>Studies, Design</i>	1
EDF-2024-DA-SIMTRAIN-STME-STEP 10 M€	Simulation and training for medical emergencies	Solution for a federation of available and enhanced medical simulation systems that support military medical curriculum and are connected to a feedback system	<i>Studies, Design, Prototyping, Testing</i>	1

* Indicative summary

EDF-2024-DA-EUCI: Call for EDF **development** actions, requiring **proposals classified at SECRET UE/EU SECRET** level, implemented via actual cost grants

Type of action:
EDF-DA: Development Action

Number of topics: 1

Type of grant:
EDF-AG: Action Grant

CALL ID
EDF-2024-DA-EUCI

TOPIC ID
EDF-2024-DA-EUCI-AIRDEF-CHGV

BUDGET
78 M€



Topic/Budget	Title	Scope*	Mandatory types of activities	Expected # projects funded
EDF-2024-DA-EUCI-AIRDEF-CHGV 78 M€	Countering hypersonic glide vehicles	Studies and performance assessment of HGV systems, detailing their signature and behaviour	<i>Integrating knowledge, Studies, Design</i>	1

Proposals to be classified at the level of **Secret UE** **EU Secret**

- **Specific submission process** (outside Funding & Tenders portal)
- **Specific eligibility conditions**

* Indicative summary

EDF-2024-RA: Call for 'thematic' EDF research actions implemented via actual cost grants

Type of action:
EDF-RA: Research Action

Number of topics: 8

Type of grant:
EDF-AG: Action Grant

CALL ID

EDF-2024-RA

TOPIC ID

- EDF-2024-RA-SENS-ART
- EDF-2024-RA-DIGIT-ASMEP
- EDF-2024-RA-AIR-AAM
- EDF-2024-RA-AIR-UCCAS-STEP
- EDF-2024-RA-GROUND-IWAS
- EDF-2024-RA-PROTMOB-FMTC
- EDF-2024-RA-UWW-SACOM-STEP
- EDF-2024-RA-SIMTRAIN-BRG-STEP

BUDGET

199 M€



EDF-2024-RA: Topics (1/2)

Topic/Budget	Title	Scope*	Mandatory types of activities	Expected # projects funded
EDF-2024-RA-SENS-ART 35 M€	Advanced radar technologies	Highly versatile and adaptive radars with compatibility with operational constraints in terms of performance, dimensions and weight	Generating knowledge, integrating knowledge, studies, design	≥1
EDF-2024-RA-DIGIT-ASMEP 15 M€	Automated structural modelling for effect prediction	Automated modelling of structures such as building, plants, etc., for effect prediction, using image processing and machine learning/AI.	Generating and integrating knowledge	≥1
EDF-2024-RA-AIR-AAM 35 M€	Concept study on advanced air-to-air missiles	Definition of requirements for a future Short-Range Missile (FSRM)	Studies	≥1
EDF-2024-RA-AIR-UCCAS-STEP 15 M€	Unmanned collaborative combat aircraft (U-CCA) systems	Exploration of different technologies and solutions for the development of a U-CCA.	Studies, Design	≥1
EDF-2024-RA-GROUND-IWAS 30 M€	Intelligent weaponry and ammunition systems	Increasing the capabilities in high-precision weaponry, including in GNSS-contested environment and improvement of terminal guidance and at extended ranges	Studies, Design	≥1
EDF-2024-RA-PROTMOB-FMTC 30 M€	Future mid-size tactical cargo aircraft	Improve technologies and key elements for a joint Future European Mid-Size Tactical Cargo Air System	Studies, Design	1

EDF-2024-RA: Topics (2/2)

Topic/Budget	Title	Scope*	Mandatory types of activities	Expected # projects funded
EDF-2024-RA-UWW-SACOM-STEP 24 M€	Secured and adaptive underwater communications for UUSs	Design and demonstrate feasibility of secured underwater (network) communication solutions for uncrewed underwater systems	Integrating knowledge, studies, design	≥1
EDF-2024-RA-SIMTRAIN-BRG-STEP 15 M€	Methods for bridging reality gaps	Common simulation framework for wargames/combat simulations, with AI-enabled battlespace simulations	Studies, Design	≥1


Creation of an innovation test hub:
 Financial support to third parties - **FSTP** (cascade funding)

- 60 k€ per third party
- Up to 2.4 M€ to FSTP
- Lumpsum grants
- Typical activities:
 - Boot camps; customised trainings; coaching; technical and business mentoring;
 - Investor pitching events; matchmaking;
 - Hackathons; peer-to-peer evaluation by entrepreneurs;
 - Dedicated business mentors with public and private capital expertise;
 - Organising online training courses, webinars, virtual matchmaking platforms and marketplaces;
 - Technology showcase; internationalisation;
- Customised support for specific challenges; proof of concept; validation; first client search; innovation management support.
- **All requirements and instructions in the portal and call document**

Content of the calls

- EDF-2024-RA-SI
- EDF-2024-LS-RA-CHALLENGE
- EDF-2024-LS-RA-DIS
- EDF-2024-LS-RA-SMERO
- EDF-2024-LS-DA-SME

Kristīne RUDZĪTE-STEJSKALA

Policy Officer, DEFIS A.3
EDF Implementation – Defence
Technologies and Innovation

EDF-2024-RA-SI: Call for **spin-in** EDF **research** actions implemented via actual cost grants

Type of action:
EDF-RA: Research Action

Number of topics: 1

Type of grant:
EDF-AG: Action Grant

CALL ID

EDF-2024-RA-SI

TOPIC ID

EDF-2024-RA-SI-MATCOMP- EC-STEP

BUDGET

25 M€

EUDIS measure

Spin-in call builds on results from civil EU funded R&D programmes and adapts to defence applications



Access to EU funded civil R&D results



Same or different consortium composition



Completed & active civil R&D projects (one or more)

Topic/Budget	Title	Scope*	Mandatory types of activities	Expected # projects funded
<p>EDF-2024-RA-SI-MATCOMP-EC-STEP</p> <p>25 M€</p>	<p>Electronic components</p>	<p>The development of RF- CMOS components and modules connected to military applications, incl. the requirements for a non-dependant production supply chain in Europe.</p>	<p><i>Generating knowledge, Integrating knowledge, Studies, Design</i></p>	<p>≥1</p>

* Indicative summary

EDF-2024-LS-RA-CHALLENGE: Call for EDF **research** actions, in the form of a **technological challenge**, implemented via lump sum grants

Type of action:
EDF-LS-RA: Lump Sum Grant – Research Action

Number of topics: 4

Type of grant:
Lump Sum Grant

CALL ID

EDF-2024-LS-RA-CHALLENGE

TOPIC ID

EDF-2024-LS-RA-CHALLENGE-SENS-RADNP
EDF-2024-LS-RA-CHALLENGE-SENS-RADNO
EDF-2024-LS-RA-CHALLENGE-SPACE-MSIAP
EDF-2024-LS-RA-CHALLENGE-SPACE-MSIAO

BUDGET

52 M€

EUDIS measure

Offers a unique combination of *steering mission-driven R&D*, promoting innovation and fostering *community building* for a particular technology



Common testing environment to measure progress of different teams in a comparable way



Blind testing ensuring the objectivity of measurements



Supports informed choices for end-users about feasibility of solutions for future systems

EDF-2024-LS-RA-CHALLENGE #1

ROBUST AUTONOMOUS DRONE NAVIGATION

Topic/Budget	Title	Scope*	Mandatory types of activities	Expected # projects funded
EDF-2024-LS-RA-CHALLENGE-SENS-RADNO 7 M€	Multi-sensor integration for robust autonomous drone navigation – Organisation of a technological challenge	Organise technological challenge for multi-sensor integration for robust autonomous drone navigation	Integrating knowledge	1
EDF-2024-LS-RA-CHALLENGE-SENS-RADNP 20 M€ (5 M€ per proposal)	Multi-sensor integration for robust autonomous drone navigation – Participation to a technological challenge	Address technological solutions for autonomous aerial drone navigation in non-permissive environments. Solutions to be evaluated through testing environment.	Generating knowledge	≥4

* Indicative summary

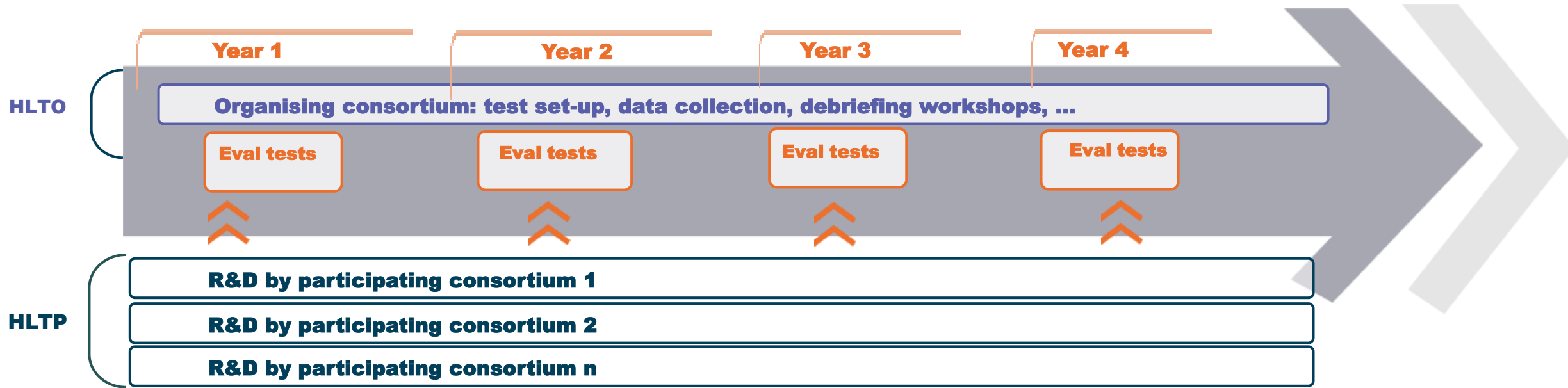
EDF-2024-LS-RA-CHALLENGE #2

MULTI-SOURCE SATELLITE IMAGE ANALYSIS

Topic/Budget	Title	Scope*	Mandatory types of activities	Expected # projects funded
EDF-2024-LS-RA-CHALLENGE-SPACE-MSIAO 10 M€	Multi-source satellite imagery analysis - Organisation of a technological challenge	Organise technological challenge on multi-source satellite imagery analysis	Integrating knowledge	1
EDF-2024-LS-RA-CHALLENGE-SPACE-MSIAP 15 M€ (5 M€ per proposal)	Multi-source satellite imagery analysis - Participation in a technological challenge	Address technological solutions to detect, identify and characterise relevant information from multi-source satellite images, taking advantage of the complementarity of optical and radar images.	Generating knowledge	≥3

* Indicative summary

EDF-2024-LS-RA-CHALLENGE: Implementation



- Lump sum broken down by participant and work package
- Paid after completion of work package



- Annexed to the Call Document

EDF-2024-LS-RA-DIS: Call for **disruptive EDF research actions** implemented via lump sum grants

Type of action:
EDF-LS-RA: Lump Sum Grant – Research Action

Number of topics: 1

Type of grant:
Lump Sum Grant

Topic/Budget	Title	Scope*	Mandatory types of activities	Expected # projects funded
EDF-2024-LS-RA-DIS-NT 16 M€ (4 M€ per proposal)	Non-thematic research actions targeting disruptive technologies for defence	Innovative technologies and solutions for defence <i>Indicative list of areas of interest provided</i>	<i>Generating knowledge</i>	≥4

EUDIS measure

Disruptive technology for defence
enhanced or completely new technology that brings about a radical change, including a paradigm shift in the concepts and conduct of defence affairs such as by replacing existing defence technologies or rendering them obsolete

- Several projects expected to be funded
- **Consortia of at least 2 legal entities** from at least 2 different Member States or Norway
- Max 4M€ per action
- Business coaching for SMEs



EDF-2024-LS-RA-SMERO: Call for EDF **research** actions, dedicated to **SMEs and research organisations**, implemented via lump sum grants

Type of action:

EDF-LS-RA: Lump Sum Grant – Research Action

Number of topics: 1

Type of grant:

Lump Sum Grant

Topic/Budget	Title	Scope*	Mandatory types of activities	Expected # projects funded
EDF-2024-LS-RA-SMERO-NT 34 M€ (4 M€ per proposal)	Non-thematic research actions by SMEs and research organisations	Innovative technologies and solutions for defence <i>Indicative list of areas of interest provided</i>	<i>At least one among Generating knowledge, Integrating knowledge, Design</i>	≥8

- Beneficiaries and affiliated entities have to be **SMEs and research organisations**, coordinated by an SME
- Up to 40% of funding to research organisations
- Subcontracting strictly limited to 30% of eligible costs for each beneficiary and affiliated entity

Eligibility

(without prejudice to other applicable eligibility conditions for research actions)

- Lump sum
- Business coaching for SMEs

EDF-2024-LS-DA-SME: Call for EDF **development** actions, dedicated to **SMEs**, implemented via lump sum grants

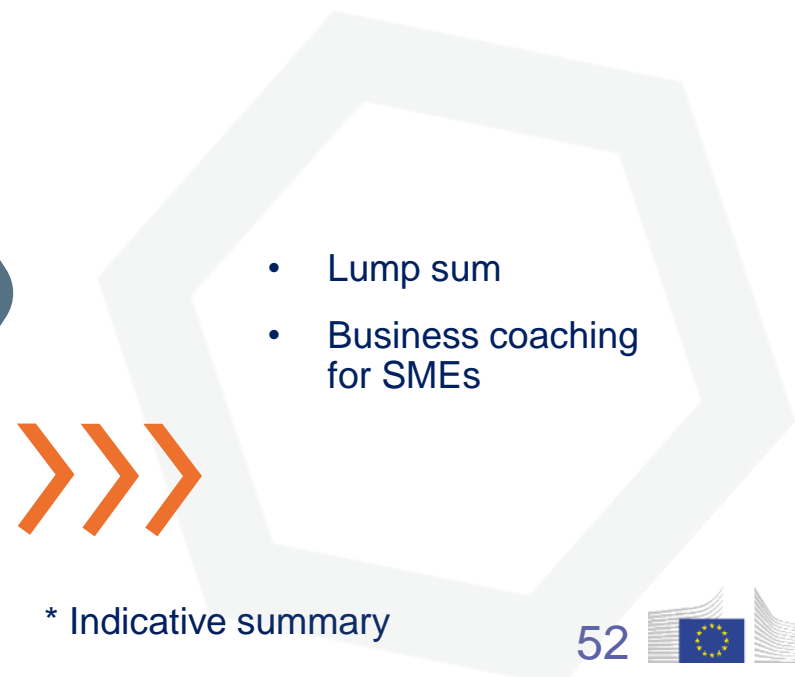
Type of action:
EDF-LS-DA: Lump Sum Grant – Development Action

Number of topics: 1

Type of grant:
Lump Sum Grant

Topic/Budget	Title	Scope*	Mandatory types of activities	Expected # projects funded
EDF-2024-LS-DA-SME-NT 33 M€ (6 M€ per proposal)	Non-thematic development actions by SMEs	Innovative technologies and solutions for defence <i>Indicative list of areas of interests provided</i>	<i>At least one among design, system prototyping, testing, qualification, certification and increasing efficiency</i>	≥5

- Beneficiaries and affiliated entities have to be **SMEs only**
- Subcontracting strictly limited to 30% of eligible costs for each beneficiary and affiliated entity



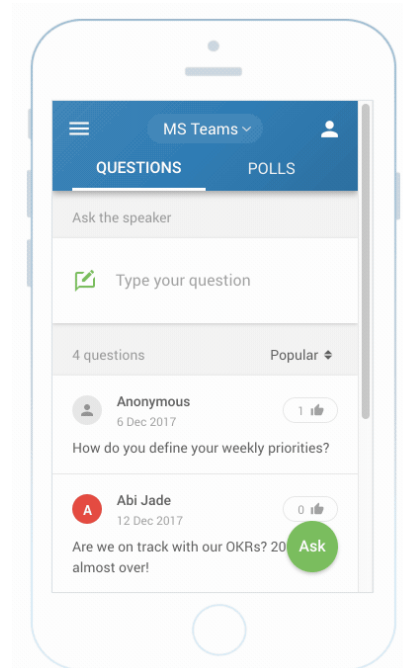
* Indicative summary

Q&A Time !

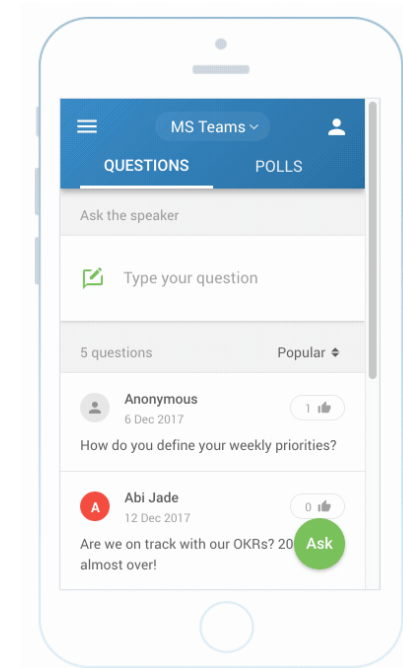


- Scan the QR code
- Enter your name & event passcode
- Ask a question!

PASSCODE:
EDF-2024



ASK A QUESTION



UPVOTE A QUESTION



EUROPEAN DEFENCE FUND

Coffee break

Resume at 12.00 (Brussels time)

12.00-13.00 (60')	<i>Evaluation of the proposals, incl. Q&A</i>
13.00-14.30 (90')	<i>Lunch break</i>
14.30-15.15 (45')	<i>Financial aspects, incl. Q&A</i>
15.15-16.00 (45')	<i>Preparation of proposals and submission process, incl. Q&A</i>
16.00-16.30 (30')	<i>Coffee break</i>
16.30-16.45 (15')	<i>Overview of available tutorials</i>
16.45-17.15 (30')	<i>What comes after the evaluation, incl. Q&A</i>
17.15-17.30 (15')	<i>EDF supporting actions, incl. Q&A</i>
17.30-17.45 (15')	<i>Concluding remarks and wrap-up</i>

EVALUATION OF THE PROPOSALS

- General workflow
- Admissibility conditions
- Exclusion grounds
- Eligibility conditions
 - Consortium
 - Entity
 - Action
- Selection criteria
- Award criteria
- Ethics

General workflow

Milosz MOMOT

Head of Unit DEFIS A.4

EDF Implementation – Defence systems

General workflow

Evaluation of proposals based on the assessment of 6 conditions and criteria by the **Evaluation Committee (Commission)** with the **assistance of independent experts**



Call for experts: profile (1/2)

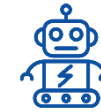
Experts assist the Commission in the assessment of the proposals submitted to the EDF 2024 calls
Expertise in technical areas, ethics or in financial assessment of defence related activities



CBRN medical countermeasures
CBRN detection



Aircraft configurations
Air Traffic Management



Unmanned systems
Manned-Unmanned teaming



C4ISR
Signal transmission



AI and its evaluation
Databases



Missile defence
warheads



Sonar, radar, optical ...
Data fusion



Synthetic fuels
Batteries



Collaborative
Combat



Cyber defence
Exercises and trainings



Electronics manufacturing
Advanced materials



Protection
Soldier systems



Shipbuilding
Naval architecture



Camouflage



Electronic warfare
Command posts

...

Call for experts: profile (2/2)



Call for experts: registration

At any time:

Register or update your **profile** in the EU experts database with relevant **fixed and free text keywords**

<https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/work-as-an-expert>

Send an email with your CV + registration number to **ec-edf-experts@ec.europa.eu**

More information on our website under 'Funding and Grants' > 'Space and Defence related funding'

https://defence-industry-space.ec.europa.eu/calls-tenders/defence-industry-call-experts-assist-european-commission-evaluation-proposals-submitted-funding_en

The screenshot shows the 'EU Funding & Tenders Portal' page for 'Work as an expert'. The page includes a navigation menu with options like Home, Funding, Procurement, Projects & results, News & events, Work as an expert (highlighted), and Guidance & documents. The main content area is titled 'Work as an expert' and contains the following sections:

- We need experts for:**
 - Assessing applications for EU funding (including prizes and tenders),
 - Monitoring of EU funded projects and contracts,
 - Giving your advice on specific issues.
- Experts act in their individual capacity to assist the EU services with the implementation of EU funding & tenders managed through the Portal.**
- Do you have an extensive professional experience & proven domain-knowledge?**
 - Register as expert [↗](#)
- As new expert,** you will be first requested to create your EU login account and register your profile.
- Registered experts** can update the profile via the 'My Expert Area' once signed in.
- Find out more about the evaluation and monitoring objectives and scope in the [terms of reference](#).
- If you need further guidance, access the [key steps for experts](#).

Below the main content, there are sections for 'Calls for expressions of interest for experts' (with links for 2021-2027 and 2014-2020), 'Working materials' (with links for standard briefing slides and information for HE monitors), and 'Useful links' (with links for Helpdesk and Support Services, FAQ for Experts, Experts dashboard, and List of contracted experts). A 'Contracts & remuneration' section includes a link for the Model contract for evaluators.

On the right side of the page, there is a 'View more details' button and a photograph of a woman working at a desk with a laptop.

Admissibility conditions Exclusion grounds

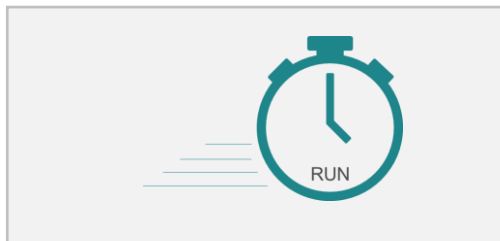
Eugenijus LIUBENKA

Legal Officer DEFIS A.3

EDF Implementation – Defence
Technologies and Innovation

Admissibility Conditions

Formal requirements related to the submission and presentation of proposals



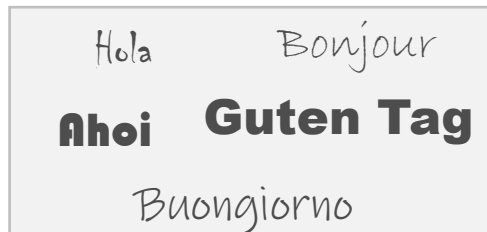
Submitted **before** the call **deadline:**
5 November 2024 - 17.00 CET



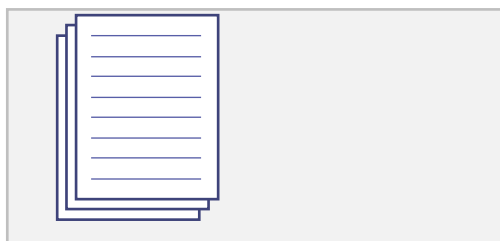
Full proposal must be **readable**, **accessible** and **printable** and searchable pdf files, unless otherwise specified



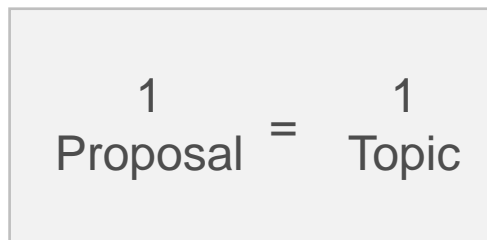
Submitted **electronically** via the Funding & Tenders Portal Electronic Submission System*



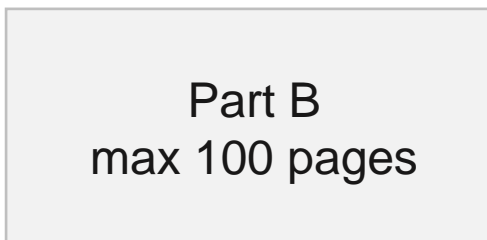
Proposal in one of the official languages of the Union (English language is encouraged)



Proposals (w/annexes and supporting documents) must be **complete** and submitted **using the forms** provided



Each proposal must only be submitted against one topic



Description of the proposal (part B) should be not longer than 100 pages

* Except for call DA-EUCI

Exclusion criteria

Determine if applicants and affiliated entities fall under exclusion grounds

- **Examples of Exclusion grounds** (article 136 of the Regulation 2018/1046)
 - Bankruptcy, insolvency, being in an arrangement with creditors, suspension of its business activities, etc.
 - breach of its obligations relating to the payment of taxes or social security contributions
 - grave professional misconduct by having violated applicable laws or regulations or ethical standards of the profession
 - fraud, corruption, conduct related to a criminal, money laundering or terrorist financing, terrorist offences or offences linked to terrorist activities, child labour or other offences
 -
- Commitment taken with the signature of the **Declaration of honour***
- Possibility to share additional/complementary information at submission or during GAP

Call document – is the main source of information!

Additional documents, referred to in the Call document, may provide clarifications and answers to questions you may have when preparing your application:

- [Online Manual](#)
- [Annotated Grant Agreement \(AGA\)](#)
- [Frequently Asked Questions](#)

Eligibility conditions

- Consortium
- Entity
- Action

Eugenijus LIUBENKA

Legal Officer DEFIS A.3

EDF Implementation –

Defence Technologies and Innovation

Joanna Szumanska

Legal Officer DEFIS A.4

EDF Implementation –

Defence systems

Eligibility of consortia and entities

Consortia

- at least three independent **eligible** entities
- established in at least three different MS/Norway

Exception

- call for disruptive technologies (EDF-2024-LS-RA-DIS): at least 2 MS/Norway

Natural persons are NOT eligible!

Entities



Entities participating in the action (1/2)

Beneficiaries

- Members of the consortium/signatories of the GA
- Need to fulfil eligibility requirements
- Can claim their own costs

Affiliated entities

- Third parties with a legal or capital link with beneficiaries that can implement part of the action in their own name
- Need to fulfil same eligibility requirements
- Can claim their own costs

Subcontractors involved in the action

- Subcontractors with a direct contractual relationship to a beneficiary
- Subcontractors to which at least 10% of the total eligible cost of the action is allocated
- Subcontractors which may require access to classified information to carry out the action
- Need to fulfil same eligibility requirements
- Beneficiary/affiliated entity can charge subcontractors' invoices as subcontracting costs

Entities participating in the action (2/2)

Associated partners

- Partner organisations which participate in the action but without the right to get grant money
 - Only possible status for:
 - Entities established outside the territory of the Union or Norway
 - Entities controlled by a non-associated third country/entity without guarantee
- Need to fulfil certain conditions
- Work packages cannot be allocated to them
- Costs not eligible for funding

Other subcontractors and suppliers

- Do not need to fulfil any eligibility conditions
- Beneficiary/affiliated entity can charge their invoice as subcontracting costs or other direct costs

Hungarian public interest trusts

Following the Council Implementing Decision (EU) 2022/2506, as of 16th December 2022, no legal commitments (including the grant agreement itself as well as subcontracts, purchase contracts, financial support to third parties, etc.) can be signed with Hungarian public interest trusts established under Hungarian Act IX of 2021 or any entity they maintain.

EU restrictive measures

Entities included into “sanctions lists” are not eligible to participate in any capacity, including as beneficiaries, affiliated entities, associated partners, subcontractors or recipients of financial support to third parties (if any). EU Sanctions Map

Control: ability to exercise a **decisive influence** on an entity, directly or indirectly through one or more intermediate entities. The fact that no influence is actually exercised is not relevant, as long as the possibility exists.

Decisive influence: possibilities available to shareholders **to influence strategic business decisions** of the entity:

Any assessment is done on a **case-by-case basis**, looking at the legal and factual position in each individual case.

- Appointment and removal of senior management
- Budget
- Investment business plan
- Market-specific decisions



Eligibility of entities (2/6)

Corporate guidance on control

Elements of control

Ownership structure and specific rights



Examples

Rights or options held by third-country shareholders



Supporting documents

- Shareholders agreement, Articles of association, Statutes
- Information of individual ultimate owners that detain at least 5% of capital or voting rights, list of specific rights
- Last three shareholders meetings (listed)

Corporate governance



Representation of third-country persons in decision-making bodies



- Shareholders agreement, MoU among shareholders, Articles of Association, Statutes
- Description of decision-making procedures, composition

Commercial links conferring control



Economic dependence on commercial cooperation with third-country shareholder



- Information on third-country entities (e.g. contracts, cooperation agreements) with contractual relationship which can give control over it

Financial links conferring control



Financial dependence on third-country shareholder's contribution

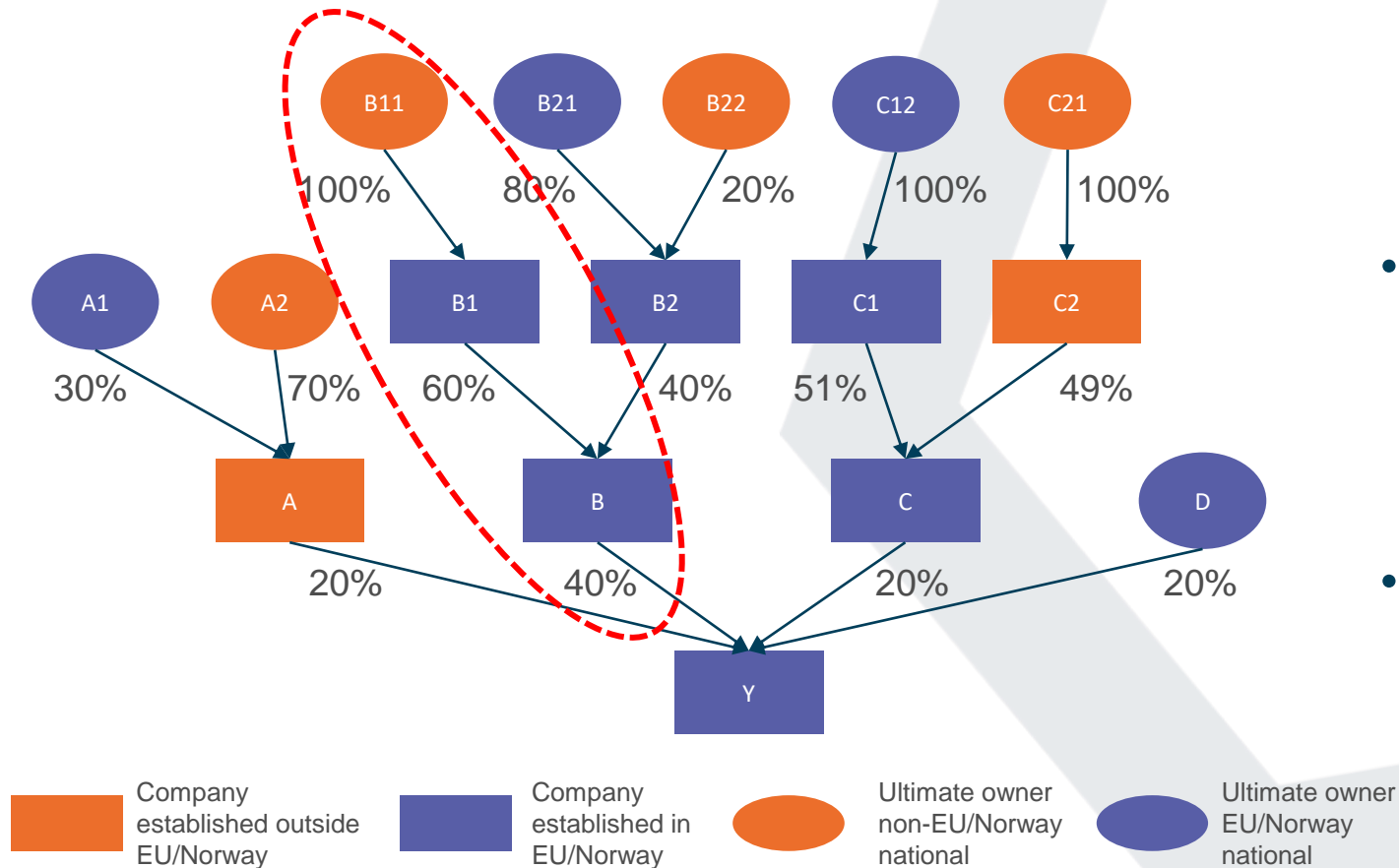


- Information on shareholders providing financing, indicating type (equity, bonds, loans...) and absolute and relative volume to undertaking's balance sheet

Eligibility of entities (3/6)

Corporate guidance on control

At which level must the control be assessed?



- Needs to be assessed at the level of the ultimate owners and all intermediate layers (in case of indirect control)
- Ultimate owners are always natural persons (except in case of public entities) who ultimately control the entity
- Ultimate owners with 5% (or more) of the shares / voting rights must be identified. Less than 5% only upon request.

Entities established in the EU/Norway but controlled by non-associated third country/entity can participate in the action and receive EDF funding if conditions relating to **security and defence interests of the Union** and its **Member States** are met:

- No risk in the ability to perform the action, no restrictions due to control (**security of supply**)
- Sensitive information not accessible to third-country entity (**security of information**)
- No transfer of IP (**IPR remains in the EU**)

Guarantees approved by Member States/Norway required

- measures in place must be substantiated (Art. 9(4) of the EDF Regulation)



Eligibility of entities (5/6)

Control: **submission template**

Template to be filled in by:

- Beneficiaries
- Affiliated entities
- Subcontractors involved in the action
- Associated partners

SELF-DECLARATION on “control” status

- applicants to tick **one of the boxes** „control”, „no control” „no change” – mandatory
- when ticking „no change” refer to the past project
- applicants to provide all relevant **information regarding control**
 - no supporting documents needed at submission stage)
 - supporting documents requested ONLY for entities selected for award (i.e. in the AWARD list)
- assessment by Central Validation Services (CVS) will have 18 months validity
- obligation to **inform on any change** on control during the action
- template for ownership control declaration: mandatory at submission (except public bodies)
- template for guarantee available: optional at submission
 - applicants concerned encouraged to contact competent national authorities at early stage
 - guarantee to be submitted for each EDF call (it can refer to all projects in which it is involved)



Eligibility of entities (6/6)

For more information about **ownership control assessment**

→ check Corporate guidance on control:

https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/common/guidance/guidance-participation-in-dep-he-edf-cef-dig-restricted-calls_dep-he-edf-cef-dig_en.pdf

→ watch **dedicated tutorial** available on our website:



[European Defence Fund - 2023 – Tutorial on ownership and control forms and assessment - Streaming Service of the European Commission \(europa.eu\)](#)

Eligibility of the action (1/7)

An action must:

- correspond to the **topic** against which it is submitted
- address **new defence products or technologies or upgrade of existing ones**
- cover mandatory **activities as indicated in the call**



Example

Development

Generating knowledge

Integrating knowledge

Studies

Design

Prototyping

Testing

Qualification

Certification

Increasing efficiency

Optional activities

Mandatory activities

Optional activities

Indications in the call document



Ineligible

- products/technologies which use, development or production is **prohibited by applicable international law**
- **Lethal autonomous weapons** without the possibility for meaningful human control over selection and engagement decisions when carrying out strikes against humans*

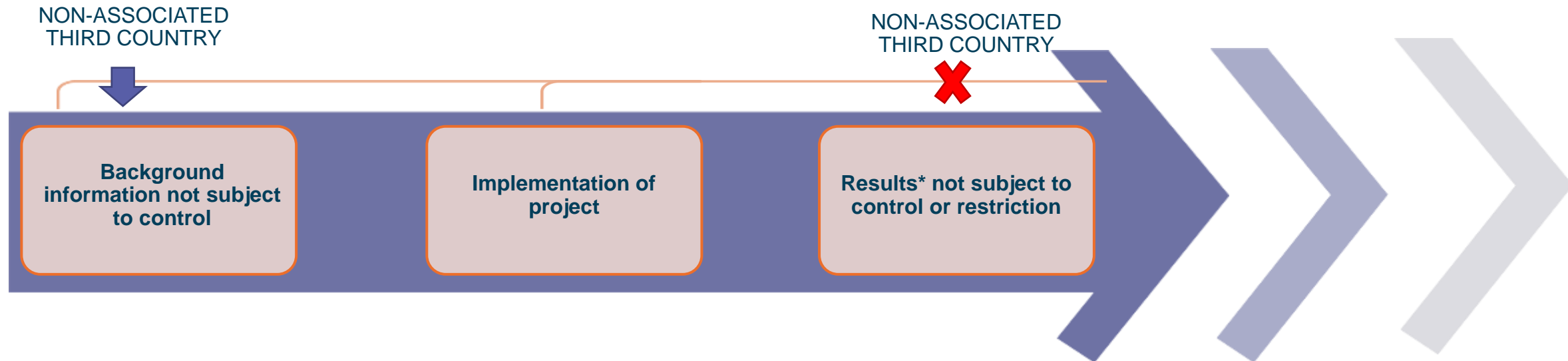
** without prejudice to the possibility of providing funding for actions for the development of early warning systems and countermeasures for defensive purposes*



Eligibility of the action (3/7)

Results not controlled

- Third country export rules apply and can **CONTAMINATE** the results
- For **upgrading of existing products and technologies**, entities also have to **demonstrate** they have the **rights** to use the background information **to upgrade**



***Results** means any tangible or intangible effect of the action, such as data, know-how or information, whatever its form or nature, whether or not it can be protected, as well as any rights attached to it, including intellectual property rights.

Eligibility of the action (4/7)

For Development actions only

- **Costs** of the action not covered by Union support are to be covered by other means of financing (e.g. **Member States/Norway co-financing, private funds**)
- **Design** activities must be based on **harmonised defence capability requirements** jointly agreed by at least two Member States or Norway (flexibility if project covers also 'studies')
- **System prototyping, testing, qualification and certification**
 - must be based on **common technical specifications** jointly agreed by the Member States or Norway that are to co-finance or that intend to jointly procure the final product or to jointly use the technology (flexibility if project covers also 'design')
 - at least two Member States or Norway 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



Eligibility of the action (5/7)

Call-specific conditions

Call EDF-2024-LS-RA-SMERO

Consortium (and affiliated entities): composed of **small and medium-sized enterprises*** (SMEs) and **research organisations**** (eligibility). Coordinator must be an SME.

- **Research organisations** within the consortium and affiliated entities cannot be allocated more than 40% of total requested grant amount for the project
- For each member of the consortium and each affiliated entity, **subcontracting will be strictly limited to 30% of its eligible costs**



Call EDF-2024-LS-DA-SME

Consortium (and affiliated entities): composed of **small and medium-sized enterprises*** (SMEs) only (eligibility)

- For each member of the consortium and each affiliated entity, **subcontracting will be strictly limited to 30% of its eligible costs**

* **SME** - small and medium-sized enterprises (SMEs) within the meaning of [EU Recommendation 2003/361](#)

** **research organisations** - non-profit organisations which carry out research and/or technological development as their main objective

Eligibility of the action (6/7)

Call-specific and topic-specific conditions

Call EDF-2024-RA-SI

Proposals:

- Build upon or integrate results achieved within one or several projects funded under a civil EU programme (focus on civil applications)
- Applicants must have the necessary rights to use and commercialise results of precursor project(s)
- Declarations to be provided in Part B

Topic EDF-2024-RA-SIMTRAIN-BRG-STEP

Grant beneficiaries: to provide financial support to third parties/cascade funding

- Third parties: in priority start-ups and SME
- Call document describes what support should be provided to third parties



Eligibility of the action (7/7)

Call-specific conditions

Call EDF-2024-DA-EUCI

Proposal

- must be classified at the level of EU Secret.

Eligible participants

- must be in possession of a valid Facility Security Clearance (FSC) at the level of SECRET UE/EU SECRET and have Communication and Information Systems (CIS) properly accredited by the respective national Accreditation Authorities.
- FSC and CIS accreditation statements, signed by appropriate national authorities, must be submitted with the proposal.



Selection criteria

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and Innovation

Financial Capacity

Demonstrate stable and sufficient sources of funding to maintain activity throughout the duration of the grant and to participate in the funding of the action.



CVS Validation

Assess applicant's (and affiliated entities') capacity to complete the proposed action



Operational Capacity

Demonstrate professional competencies and qualifications required to complete the proposed action



Information to be included in Part B and Annexes

- Checks performed by the Central Validation Services (CVS)
- Documents to be provided in the Participant Register

Balance sheet and profit & loss account for the last financial year for which the accounts were closed

Audit report produced by an approved external auditor for applicants requesting more than EUR 750 000 of Union financial support

Statutory audit required by EU/national law:

- YES: submit
- NO: self-declaration

Certify/Validate last 3 financial years

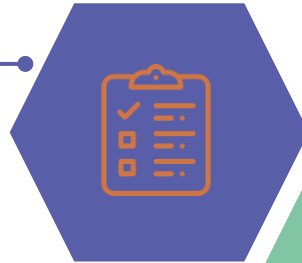
Document NOT required for:

- Public Bodies
- International Organisations
- Natural persons in receipt of education support/ in need and receipt of direct support



Participant information

- Profile and area of expertise relevant to the action



Projects or activities

- Related to the task to be performed
- Year/duration/value/role of applicant



Key staff

- Expertise and know-how of personnel
- For lump sum: CVs of team involved in the action



Assessment via award criterion 8 “Implementation”

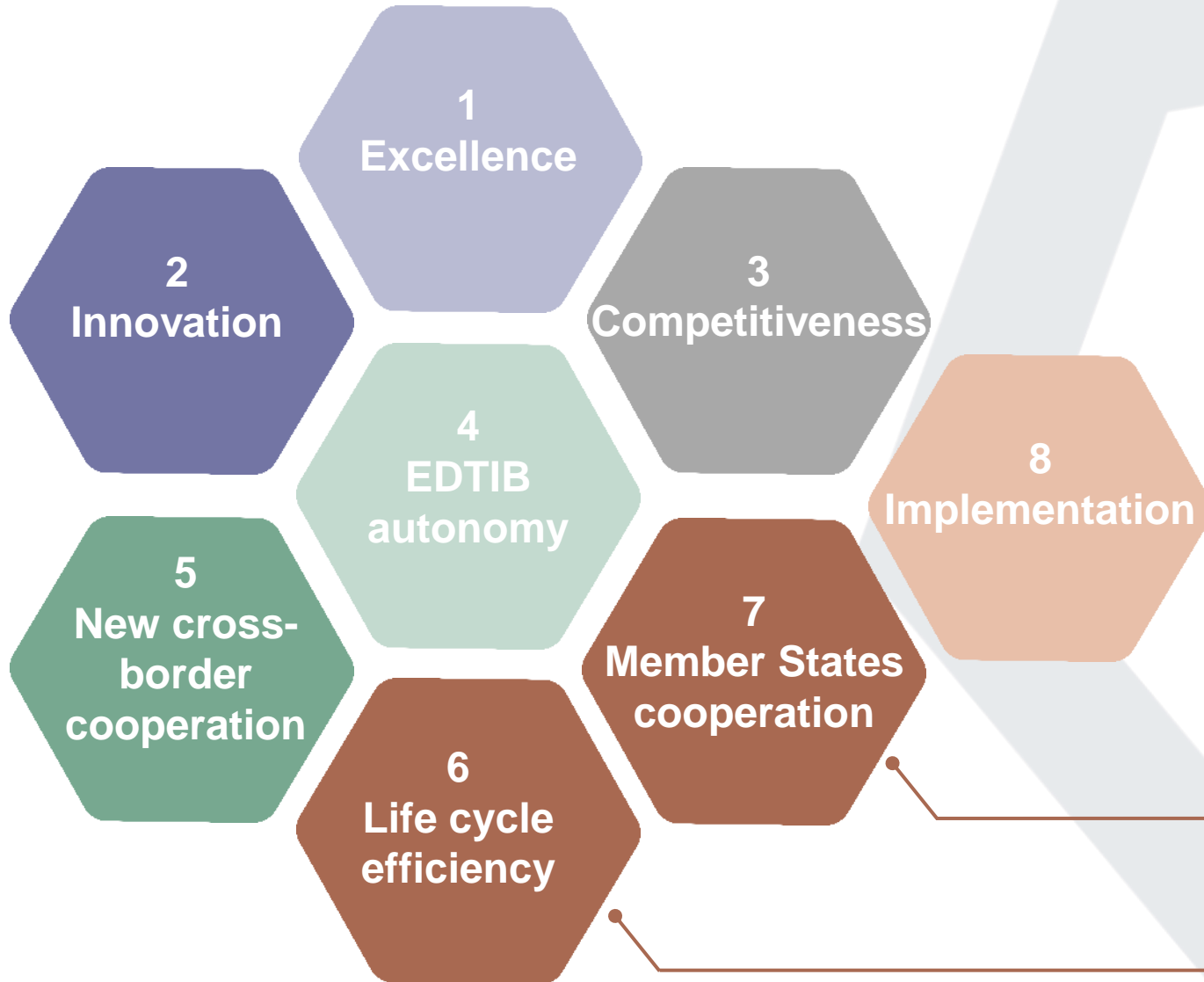
Award criteria

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Award criteria



**Criteria 1, 2, 3, 4, 5 and 8
Applicable to all calls
(Research and Development)**

**Criteria 6 & 7 only applicable
to Development calls**

Criterion 1: Excellence



*Contribution to excellence or potential of disruption in the defence domain, in particular by showing that the expected results of the proposed action present **significant advantages over existing defence products or technologies***

- Excellence of the overall concept and soundness of the proposed approach for the solution
- Compliance with the objectives, scope, targeted activities, functional requirements and expected impact
- Advantage (strategic, technological or operational) over existing defence products or technologies; potential of disruption in the defence domain



Contribution to the **innovation and technological development** of the European defence industry, in particular by showing that the proposed action includes ground-breaking or novel concepts and approaches, new promising future technological improvements or the application of technologies or concepts previously not applied in defence sector, while avoiding unnecessary duplication

- Innovation potential, ground breaking concepts (e.g. new products, services, business models...), new technological applications to defence sector
- Take due account (and integration with) past/ongoing activities in the defence/civil sectors
- Spin-off to other defence applications/products

Criterion 3: Competitiveness



*Contribution to the competitiveness of the European defence industry by showing that the proposed action is a demonstrably **positive balance of cost-efficiency and effectiveness** thus creating new market opportunities across the Union and beyond and accelerating the growth of companies throughout the Union.*

- Competitive advantage of the product/technology/solution vis-a-vis existing or planned solutions
- Potential to accelerate the growth of companies (including market analysis)
- Strength of the IP strategy (e.g. patents) associated with the solution

Criterion 4: EDTIB autonomy



*Contribution to the autonomy of the European Defence Technological Industrial Base (EDTIB), including by **increasing the non-dependency** on non-Union sources and strengthening security of supply, and to the security and defence interests of the Union in line with the priorities referred to in Article 3*

- Increasing the Union's industrial and technological non-dependency
- EU security of supply
- Contribution to defence capability priorities agreed by MS (e.g. CDP, regional priorities...)

Criterion 5: New cross-border cooperation



Contribution to the creation of **new cross-border cooperation** between legal entities established in Member States or associated countries, in particular **SMEs and mid-caps with a substantial participation** in the action, as recipients, subcontractors or as other legal entities in the supply chain, and which are established in Member States or associated countries other than those where the legal entities cooperating within a consortium which are not SMEs or mid-caps are established.

- *Qualitative assessment in part B. Quantitative information on SME and mid-caps participation in Detailed budget table.*
- Creation of new cross-border cooperation in particular targeting SME and mid-caps
- Planned future cross-border cooperation
- Extent and added value of SME and mid-caps contribution to the action

Criterion 8: Implementation



Quality and efficiency of the carrying out of the action

- Structure of the work plan including timing and inter-relation of the work packages
- Usefulness and comprehensiveness of the milestones and deliverables
- Management structures and procedures including decision making and risk management
- Consortium resources and allocation of tasks ensuring that all participants have a valid and complementary role

Criterion 6: Life cycle efficiency



The contribution to **increasing efficiency across the life cycle** of defence products and technologies, including cost-effectiveness and the potential for synergies in the procurement, maintenance and disposal processes.

- Improvements compared to existing solutions as regards lower production, operational, in-service support costs
- Simplification of processes or combination with existing ones

✓ *Only for Development actions*

✓ *Assessed for all development actions, even if not covering activity type i) increasing efficiency*

Criterion 7: MS cooperation



*The contribution to the further **integration of the European defence industry** throughout the Union through the demonstration by the recipients that Member States have undertaken to jointly use, own or maintain the final product or technology in a coordinated manner.*

- Number of Member States involved
 - Contribution to integration of EU defence industry and increase cooperation
- ✓ *Only for Development actions*
- ✓ *Assessed for all development actions, also in cases in which the joint use/ownership/... is not an eligibility criteria as per the activities (e) prototyping to (h) certification*
- ✓ *Part B and supporting documents (e.g. Letter of Intent)*

Predefined scale: each criterion scored from 0 to 5 (half points allowed)

0	»»»	The proposal fails to address the criterion or cannot be assessed due to missing or incomplete information.
1	»»»	Poor. The criterion is inadequately addressed, or there are serious inherent weaknesses.
2	»»»	Fair. The proposal broadly addresses the criterion, but there are significant weaknesses.
3	»»»	Good. The proposal addresses the criterion well, but a number of shortcomings are present.
4	»»»	Very Good. The proposal addresses the criterion very well, but a small number of shortcomings are present.
5	»»»	Excellent. The proposal successfully addresses all relevant aspects of the criterion. Any shortcomings are minor.

Weighting

Criterion	Research	Development
1 – Excellence	2	2
2 – Innovation	2	1
3 – Competitiveness	1	1
4 – EDTIB autonomy	1	2
5 – New cross-border cooperation	2	2
6 – Life cycle efficiency	<i>Not applicable</i>	1
7 – MS cooperation	<i>Not applicable</i>	1
8 – Implementation	1	1
<i>Maximum score</i>	45	55
<i>Minimum pass score</i>	30	37

Ethics

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and Innovation

Ethics issues table and ethics self-assessment

Part A

4 - Other questions

Ethics Issues Table		?
1. Human embryonic stem cells and human embryos		Page
Does this activity involve human embryonic stem cells (hESCs)?	<input checked="" type="radio"/> Yes <input type="radio"/> No	12
Will they be directly derived from embryos within this project?	<input type="radio"/> Yes <input checked="" type="radio"/> No	
Are they previously established cell lines?	<input type="radio"/> Yes <input checked="" type="radio"/> No	
Are the cell lines registered in the European registry for human embryonic stem cell line?	<input type="radio"/> Yes <input checked="" type="radio"/> No	
Does this activity involve the use of human embryos?	<input type="radio"/> Yes <input checked="" type="radio"/> No	
2. Humans		Page
Does this activity involve human participants?	<input checked="" type="radio"/> Yes <input type="radio"/> No	14
Are they volunteers for non medical studies (e.g. social or human sciences)?	<input type="radio"/> Yes <input checked="" type="radio"/> No	
Are they healthy volunteers for medical studies?	<input type="radio"/> Yes <input checked="" type="radio"/> No	
Are they patients for medical studies?	<input checked="" type="radio"/> Yes <input type="radio"/> No	15
Are they potentially vulnerable individuals or groups?	<input type="radio"/> Yes <input checked="" type="radio"/> No	
Are they children/minors?	<input type="radio"/> Yes <input checked="" type="radio"/> No	
Are they other persons unable to give informed consent?	<input type="radio"/> Yes <input checked="" type="radio"/> No	
Does this activity involve interventions (physical also including imaging technology, behavioural treatments, tracking and tracing etc.) on the study participants?	<input type="radio"/> Yes <input checked="" type="radio"/> No	
Does this activity involve conducting a clinical study as defined by the Clinical Trial Regulation (EU 536/2014) (using pharmaceuticals, biologicals, radiopharmaceuticals, or advanced therapy medicinal products)?	<input type="radio"/> Yes <input checked="" type="radio"/> No	
3. Human cells / tissues		Page
Does this activity involve the use of human cells or tissues (not covered by section 1)?	<input type="radio"/> Yes <input checked="" type="radio"/> No	
4. Personal data		Page
Does this activity involve processing of personal data?	<input type="radio"/> Yes <input checked="" type="radio"/> No	



Version 2.0 13 July 2021

[how-to-complete-your-ethics-self-assessment_en.pdf \(europa.eu\)](https://european-commission.europa.eu/how-to-complete-your-ethics-self-assessment_en.pdf)

Part A

Ethics Self-Assessment ?

Ethical dimension of the objectives, methodology and likely impact

Explain in detail the identified issues in relation to:

- objectives of the activities (e.g. study of vulnerable populations, etc.)
- methodology (e.g. clinical trials, involvement of children, protection of personal data, etc.)
- the potential impact of the activities (e.g. environmental damage, stigmatisation of particular social groups, political or financial adverse consequences, misuse, etc.)

Remaining characters 5000

Compliance with ethical principles and relevant legislation

Describe how the issue(s) identified in the ethics issues table above will be addressed in order to adhere to the ethical principles and what will be done to ensure that the activities are compliant with the EU/national legal and ethical requirements of the country or countries where the tasks are to be carried out. It is reminded that for activities performed in a non-EU country, they should also be allowed in at least one EU Member State.

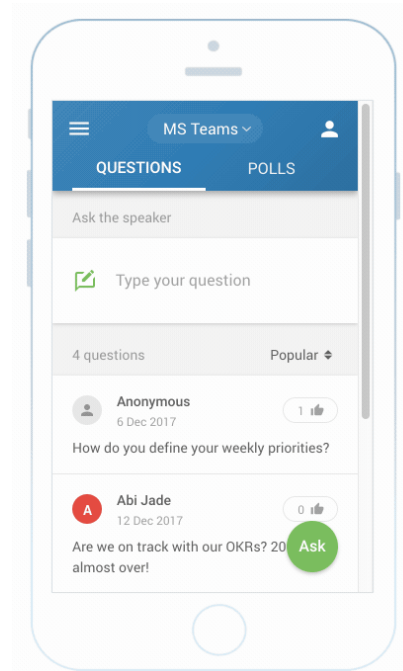
Remaining characters 5000

Q&A Time !

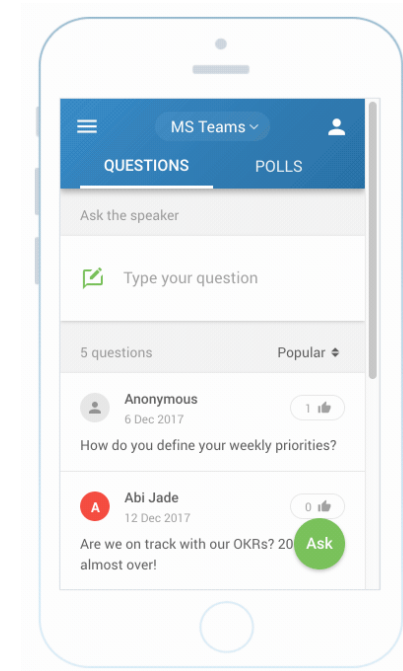


PASSCODE:
EDF-2024

- Scan the QR code
- Enter your name & event passcode
- Ask a question!



ASK A QUESTION



UPVOTE A QUESTION



EUROPEAN DEFENCE FUND

Lunch break

Resume at 14.30
(Brussels time)

14.30-15.15 (45')	<i>Financial aspects, incl. Q&A</i>
15.15-16.00 (45')	<i>Preparation of proposals and submission process, incl. Q&A</i>
16.00-16.30 (30')	<i>Coffee break</i>
16.30-16.45 (15')	<i>Overview of available tutorials</i>
16.45-17.15 (30')	<i>What comes after the evaluation, incl. Q&A</i>
17.15-17.30 (15')	<i>EDF supporting actions, incl. Q&A</i>
17.30-17.45 (15')	<i>Concluding remarks and wrap-up</i>

FINANCIAL ASPECTS

- Type of grants
- Payment scheme
- EU funding rates

Type of grants

Rosa GARCIA DE LA CALERA

DG DEFIS Unit R.2
Financial Management

Type of grants in EDF 2024



DEVELOPMENT

EDF-2024-DA-EUCI
EDF-2024-DA-SGA
EDF-2024-DA

EDF-2024-LS-DA-SME

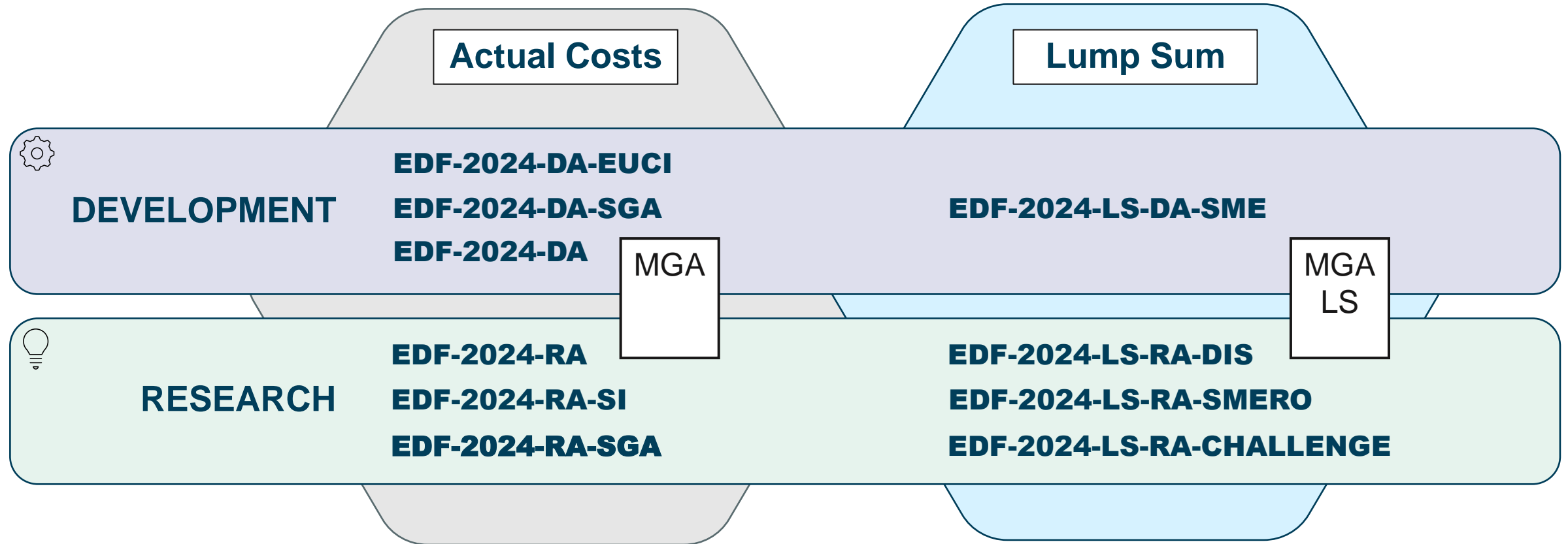


RESEARCH

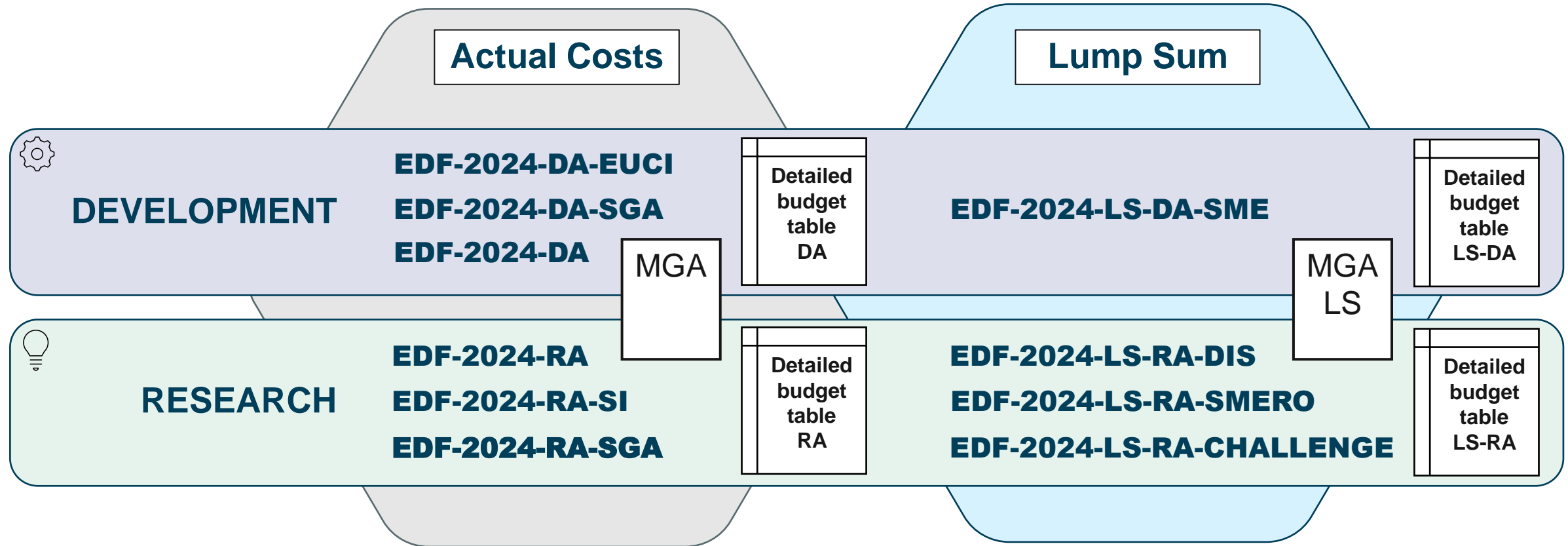
EDF-2024-RA
EDF-2024-RA-SI
EDF-2024-RA-SGA

EDF-2024-LS-RA-DIS
EDF-2024-LS-RA-SMERO
EDF-2024-LS-RA-CHALLENGE

Type of grants in EDF 2024



Type of grants in EDF 2024



AC and LS: common points

Actual Costs

Lump Sum

- **Evaluation criteria**
- **Most provisions of MGA:** IPR, confidentiality and security, ethics, implementation of the action...
- **Payment scheme:** Pre-financing – (Interim payment(s)) – Final payment.

AC and LS: differences at PROPOSAL stage



Actual Costs

Staff effort per beneficiary and WP.

Detailed cost estimations and information on **specific items** (subcontractors, purchases).

Summary costs for other items.

AC and LS: differences at PROPOSAL stage



Actual Costs

Staff effort per beneficiary and WP.

Detailed cost estimations and information on **specific items** (subcontractors, purchases).

Summary costs for other items.

Lump Sum

Detailed cost estimations and information:

- for **all cost categories** per **beneficiary**.
- per **work package (WP)** = major sub-division of the work plan of the project.
- based on **detailed staff effort** for personnel costs.

AC and LS: differences at EVALUATION & GAP

Actual Costs

Clarifications and corrections of **obvious budget mistakes.**

Indicative budget (per cost category & per beneficiary) in the GA.



Actual Costs

Clarifications and corrections of **obvious budget mistakes**.

Indicative budget (per cost category & per beneficiary) in the GA.



Lump Sum

In depth assessment of budget proposal by Commission + independent experts.

Result of assessment in the Executive Summary Report (ESR).

Potential request for **clarifications** and **supporting documents** (salary slips, offers from providers, etc.)

Possible subsequent **budget adjustments**.

Establishment of lump sum amounts (per WP & per beneficiary) in the GA.

Actual Costs

Payment upon:

- **work carried out**
- **incurred costs reported**

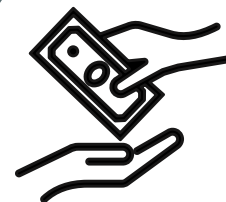
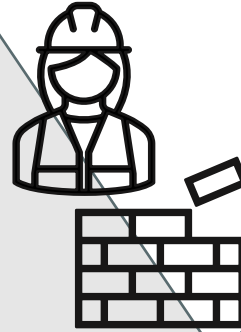
Technical checks and reviews.

Need to provide **proof of work carried out** (deliverables, technical documents, etc.)

Financial (ex-ante) controls before each payment.

Financial ex-post audits.

Need to keep **time sheets, salary slips, invoices** for personnel costs, equipment and subcontracting, etc.



Actual Costs

Payment upon:

- **work carried out**
- **incurred costs reported**

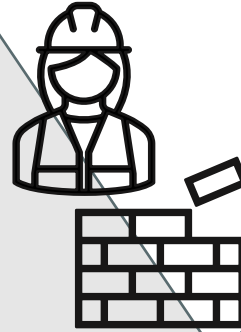
Technical checks and reviews

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Financial ex-post audits

Need to keep **time sheets, salary slips, invoices** for personnel costs, equipment and subcontracting, etc.

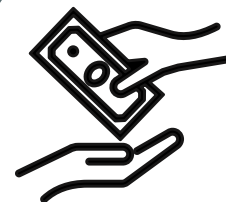


Lump Sum

Payments upon **completion of work only** (no checks on costs/prices).

Only **technical checks** and reviews (ex-ante or ex-post) are possible.

Only need to provide **proof of completion of work** (deliverables, technical documents, etc.)



Payment scheme

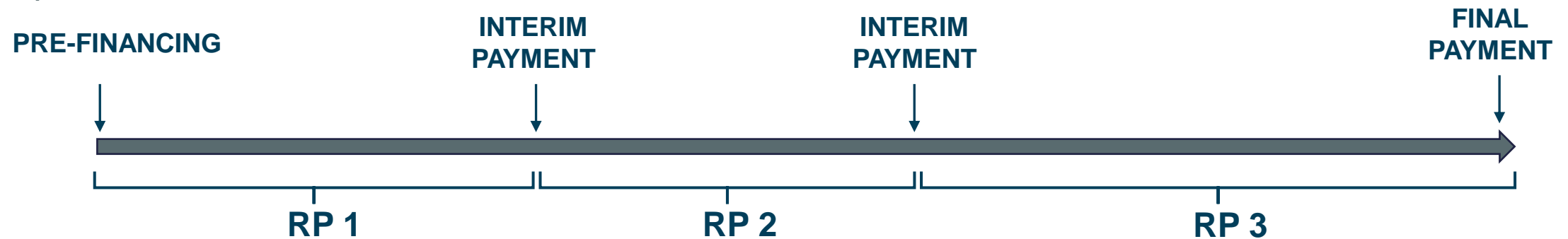
Rosa GARCIA DE LA CALERA

DG DEFIS Unit R.2
Financial Management

Payment Scheme

- **EDF Payment scheme:** Pre-financing – (Interim payment(s)) – Final payment
- Payments are made at the end of **reporting periods (RP)** upon approval of a **periodic report**.

Example:



The number and duration of the RP (usually 12-18 months) are decided during grant agreement preparation

Payment Scheme

- EDF Payment scheme: Pre-financing – (Interim payment(s)) – Final payment
- Payments are made at the end of reporting periods (RP) upon approval of a periodic report.
- Pre-financing + interim **payments amounts up to 90%** of the maximum grant amount.

Example:

Payments for a grant with Maximum grant amount = EUR 100

	Accepted costs* (AC) or WP completed (LS)	Amount paid	Cumulative amount paid
PRE-FINANCING		55,00 €	55,00 €
Interim payment RP1	30,00 €	30,00 €	85,00 €
Interim payment RP2	40,00 €	5,00 €	90,00 €
Final payment RP3	30,00 €	10,00 €	100,00 €



* It should be read as EU contribution corresponding to the accepted costs

Subject to the outcome of the **Financial Capacity Assessment** by Central Validation Services

IF all beneficiaries OK



**Single pre-financing =
55% of the maximum
grant amount**

Subject to the outcome of the **Financial Capacity Assessment** by Central Validation Services

IF all beneficiaries OK

IF coordinator is weak

- » Coordinator provides pre-financing guarantee for full pre-financing of the grant
- » Coordinator is replaced by other member of consortium with good/acceptable financial capacity

Single pre-financing = 55% of the maximum grant amount

Subject to the outcome of the **Financial Capacity Assessment** by Central Validation Services

IF all beneficiaries OK

IF coordinator is weak

»» Coordinator provides pre-financing guarantee for full pre-financing of the grant

»» Coordinator is replaced by other member of consortium with good/acceptable financial capacity

IF one or more beneficiaries weak/insufficient

Single pre-financing = 55% of the maximum grant amount

Reduced pre-financing

Pre-financing broken down in instalments

Other protective measures defined on a case-by-case basis

Interim payment - AC

Estimated budget for the entire action in the GA:

	Personnel	Subcontracting	Purchase	Other direct	Indirect	Total costs	Funding rate	Maximum EU contribution
COO	300	50	20	0	80	450	100%	450
BEN 2	150	0	10	0	40	200	100%	200
BEN 3	110	0	10	0	30	150	87%	130,95
TOTAL	560	50	40	0	150	800	/	780,95

Interim payment - AC

Estimated budget for the entire action in the GA:

	Personnel	Subcontracting	Purchase	Other direct	Indirect	Total costs	Funding rate	Maximum EU contribution
COO	300	50	20	0	80	450	100%	450
BEN 2	150	0	10	0	40	200	100%	200
BEN 3	110	0	10	0	30	150	87%	130,95
TOTAL	560	50	40	0	150	800	/	780,95

Financial statements – actual costs for the reporting period:

	Personnel	Subcontracting	Purchase	Other direct	Indirect	Total costs	Funding rate	Maximum EU contribution
COO	90	50	10	0	25	175	100%	175
BEN 2	50	0	5	0	40	95	100%	95
BEN 3	70	0	10	0	30	110	87%	96,03
TOTAL	210	50	25	0	95	380	/	366,03

Interim payment - AC

Estimated budget for the entire action in the GA:

	Personnel	Subcontracting	Purchase	Other direct	Indirect	Total costs	Funding rate	Maximum EU contribution
COO	300	50	20	0	80	450	100%	450
BEN 2	150	0	10	0	40	200	100%	200
BEN 3	110	0	10	0	30	150	87%	130,95
TOTAL	560	50	40	0	150	800	/	780,95

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BEN 2	50	0	5	0	40	95	100%	95
BEN 3	70	0	10	0	30	110	87%	96,03
TOTAL	210	50	25	0	95	380	/	366,03

Amount to be paid to coordinator 
if the Commission accepts periodic report (work OK) and costs are considered eligible

Interim payment - LS

LS established in the GA:

	WP1	WP2	WP3	WP4	Total per beneficiary
COO	250			50	300
BEN 2		150	50	50	250
BEN 3	100	100		50	250
TOTAL	350	250	50	150	800

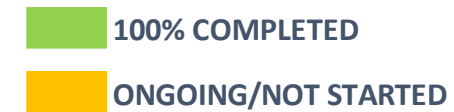
Interim payment - LS

LS established in the GA:

	WP1	WP2	WP3	WP4	Total per beneficiary
COO	250			50	300
BEN 2		150	50	50	250
BEN 3	100	100		50	250
TOTAL	350	250	50	150	800

Reporting period: level of completion of the WP

	WP1	WP2	WP3	WP4
COO	250			50
BEN 2		150	50	50
BEN 3	100	100		50



Interim payment - LS

LS established in the GA:

	WP1	WP2	WP3	WP4	Total per beneficiary
COO	250			50	300
BEN 2		150	50	50	250
BEN 3	100	100		50	250
TOTAL	350	250	50	150	800

Reporting period: level of completion of the WP

	WP1	WP2	WP3	WP4
COO	250			50
BEN 2		150	50	50
BEN 3	100	100		50
TOTAL	350	0	50	100

100% COMPLETED
ONGOING/NOT STARTED

= 400

Interim payment - LS

LS established in the GA:

	WP1	WP2	WP3	WP4	Total per beneficiary
COO	250			50	300
BEN 2		150	50	50	250
BEN 3	100	100		50	250
TOTAL	350	250	50	150	800

Reporting period: level of completion of the WP

	WP1	WP2	WP3	WP4
COO	250			50
BEN 2		150	50	50
BEN 3	100	100		50
TOTAL	350	0	50	100

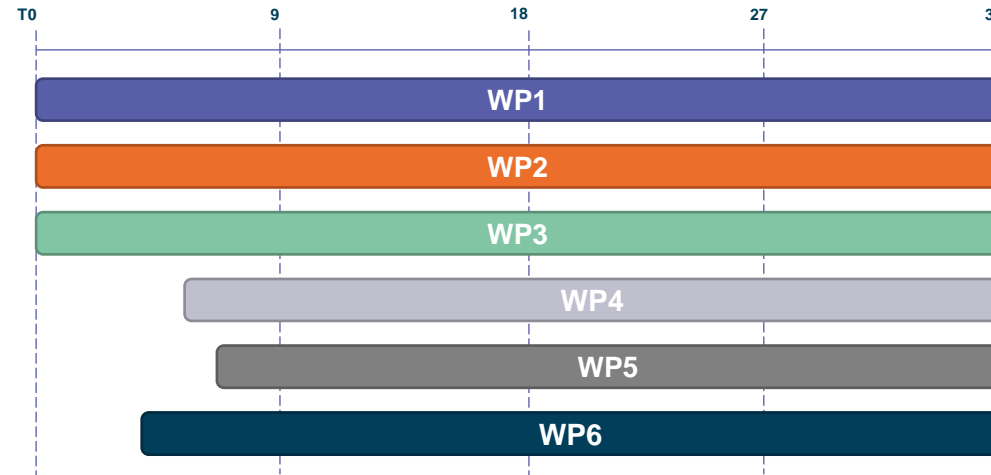
- 100% COMPLETED
- ONGOING/NOT STARTED

Amount to be paid to coordinator if the Commission certifies the completion of WP

= 400

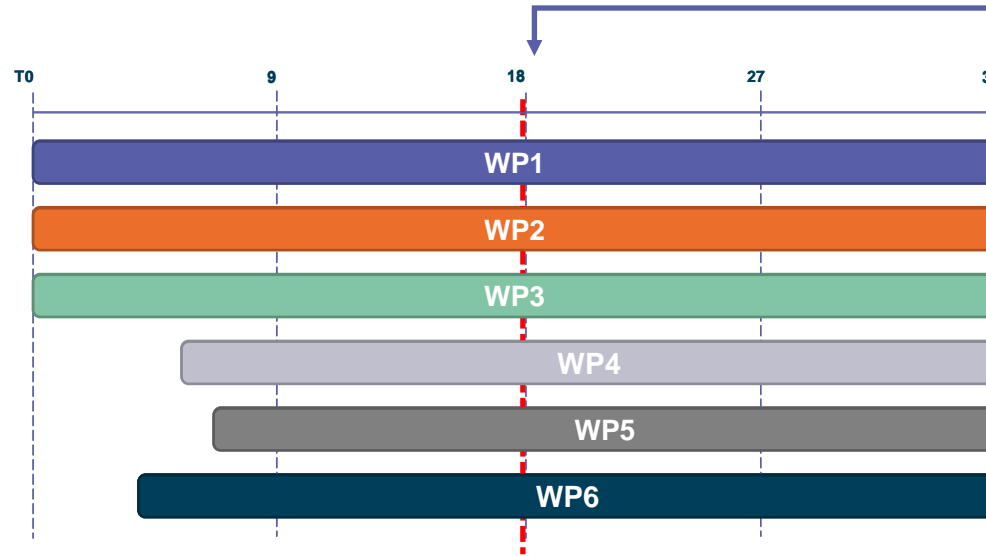
LS Project design - TIPS

Propose **as many WP as needed** → but no more than what is manageable.



LS Project design - TIPS

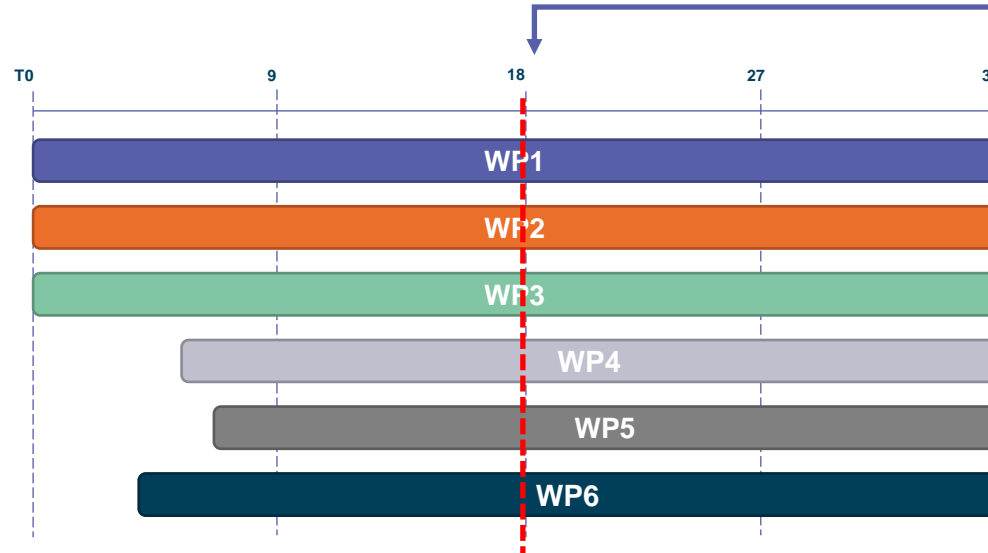
Propose **as many WP as needed** → but no more than what is manageable.



Consider typical **reporting periods** proposed by the Commission (i.e. 12 -18 months).

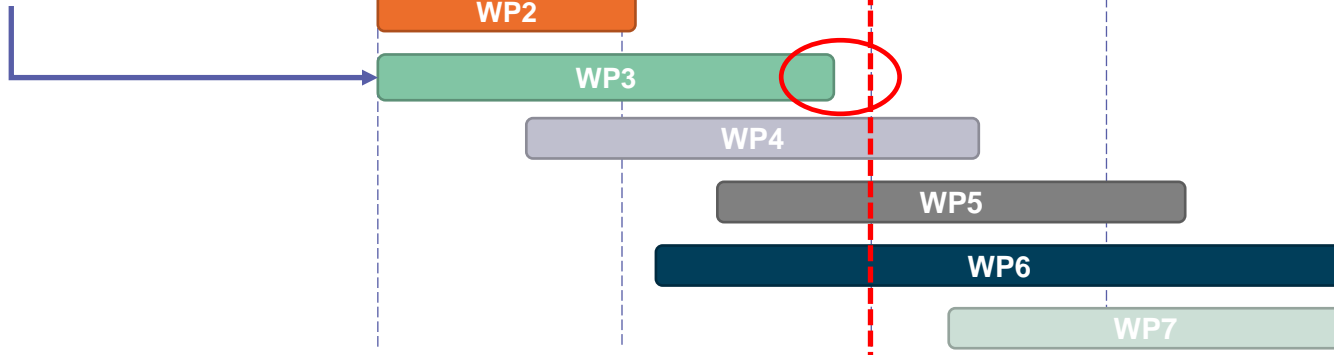
LS Project design - TIPS

Propose as many WP as needed → but no more than what is manageable.



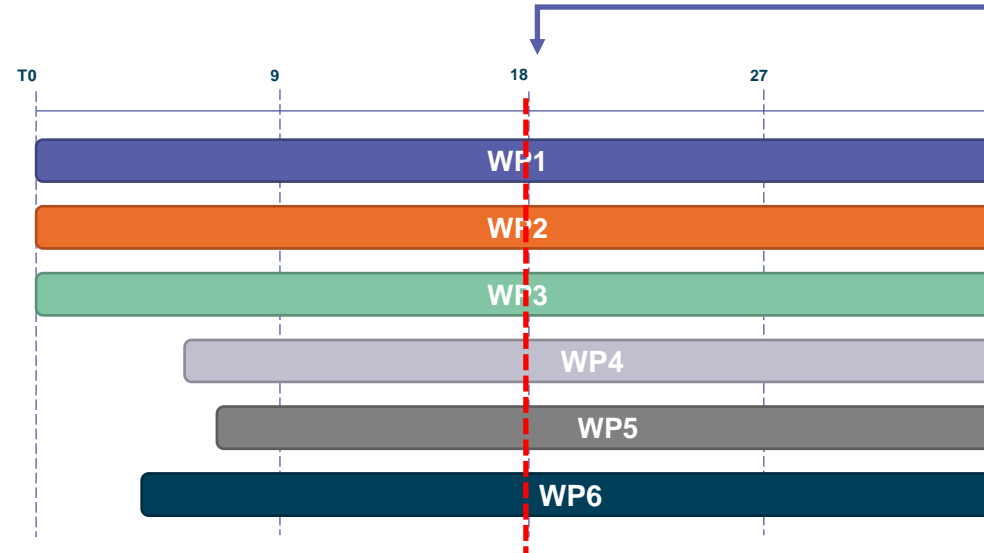
Consider typical **reporting periods** proposed by the Commission (i.e. 12 -18 months).

Consider possible **delays** in the completion of WP.



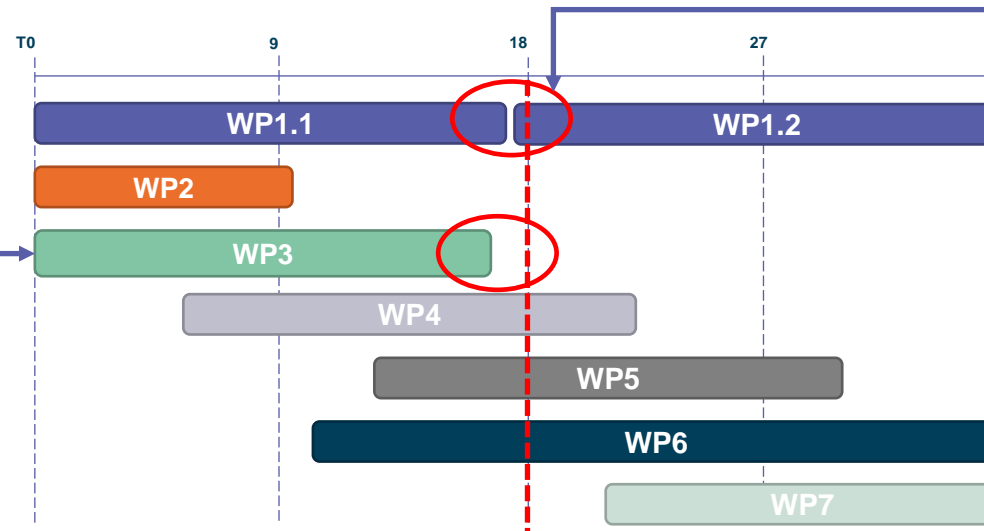
LS Project design - TIPS

Propose as many WP as needed → but no more than what is manageable.



Consider typical **reporting periods** proposed by the Commission (i.e. 12 -18 months).

Consider possible **delays** in the completion of WP.



Long WP (e.g. management, dissemination and exploitation) **may be split** along the reporting periods.

Final payment - AC

The final payment is made at last Reporting Period.

The final payment (= payment of the balance) reimburses the remaining part of the eligible costs and contributions claimed for the implementation of the action (if any).

Balance = Final grant amount (sum of all RP) - prefinancing and interim payments made.

IF the balance is positive, it will be paid to the coordinator.

IF the balance is negative, it will be recovered.

Final payment - AC

The final payment is made at last Reporting Period.

The final payment (= payment of the balance) reimburses the remaining part of the eligible costs and contributions claimed for the implementation of the action (if any).

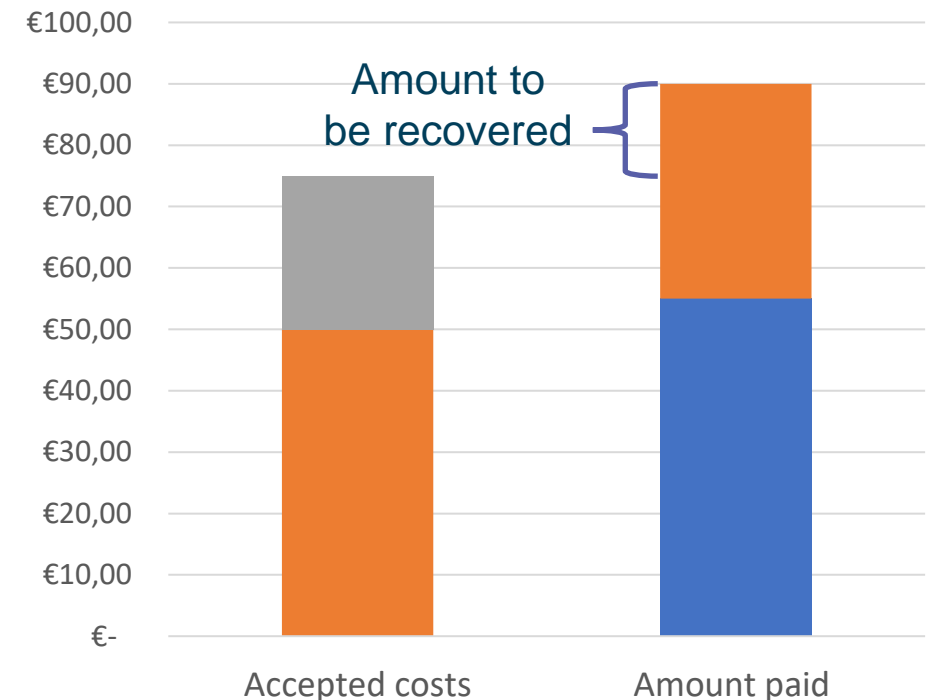
Balance = Final grant amount (sum of all RP) - prefinancing and interim payments made.

IF the balance is positive, it will be paid to the coordinator.

IF the balance is negative, it will be recovered.

Example:

	Accepted costs	Amount paid
PRE-FINANCING		55,00 €
Interim payments	50,00 €	35,00 €
Final payment	25,00 €	- €
TOTAL	75,00 €	90,00 €



Final payment - LS

The final payment is made at last Reporting Period.

The final payment (= payment of the balance) reimburses the remaining eligible lump sum contributions claimed for the implemented work packages (if any).

Balance = Final grant amount (sum of all RP) - prefinancing and interim payments made.

IF the balance is positive, it will be paid to the coordinator.

IF the balance is negative, it will be recovered.

Final payment - LS

The final payment is made at last Reporting Period.

The final payment (= payment of the balance) reimburses the remaining eligible lump sum contributions claimed for the implemented work packages (if any).

Balance = Final grant amount (sum of all RP) - prefinancing and interim payments made.

IF the balance is positive, it will be paid to the coordinator.

IF the balance is negative, it will be recovered.

For the last reporting period, the beneficiaries may exceptionally declare partial lump sum contributions for work packages that were not completed (e.g. due to force majeure or technical impossibility).

EU funding rates

Rosa GARCIA DE LA CALERA

DG DEFIS Unit R.2
Financial Management

EU funding rates: Research vs Development

- EDF is an activity-based programme: actions are composed of different activities financed at different rates.
- Funding rate mechanism to incentivise participation of SMEs and mid-caps, synergies with other EU initiatives and co-financing (leverage effect).

EU funding rates: Research vs Development

- EDF is an activity-based programme: actions are composed of different activities financed at different rates.
- Funding rate mechanism to incentivise participation of SMEs and mid-caps, synergies with other EU initiatives and co-financing (leverage effect).

RESEARCH

Activity type	EU funding rate
Generating knowledge	100%
Integrating knowledge	100%
Studies	100%
Design	100%

DEVELOPMENT

Activity type	EU baseline funding rate
Integrating knowledge	65%
Studies	90%
Design	65%
Prototyping	20%
Testing	45%
Qualification	70%
Certification	70%
Increasing efficiency	65%

BONUS
→

EU maximum funding rate
100%
100%
100%
100%
55%
80%
80%
80%
100%

EU funding rates: Research vs Development

- EDF is an activity-based programme: actions are composed of different activities financed at different rates.
- Funding rate mechanism to incentivise participation of SMEs and mid-caps, synergies with other EU initiatives and co-financing (leverage effect).

RESEARCH

Activity type	EU funding rate
Generating knowledge	100%
Integrating knowledge	100%
Studies	100%
Design	100%

Funding rate of the activity applies to:

- All beneficiaries
- All costs categories included in the activity

DEVELOPMENT

Activity type	EU baseline funding rate
Integrating knowledge	65%
Studies	90%
Design	65%
Prototyping	20%
Testing	45%
Qualification	70%
Certification	70%
Increasing efficiency	65%

BONUS
→

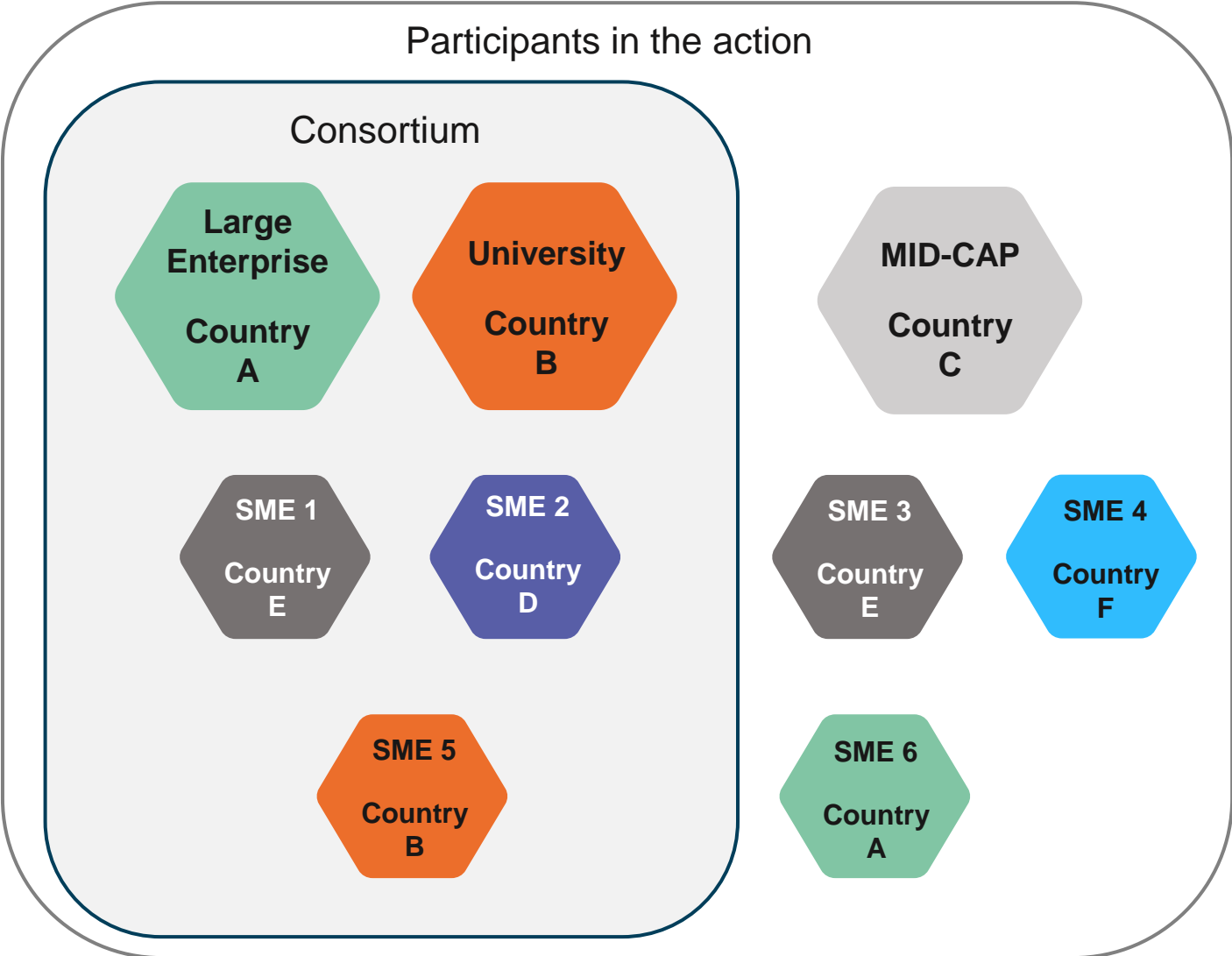
EU maximum funding rate
100%
100%
100%
55%
80%
80%
80%
100%

The bonus system: development actions

CONDITION FOR APPLICATION	VALUE OF THE BONUS
PESCO Bonus	
Action developed in context of the Permanent Structured Cooperation (PESCO)	+10% for all activities in the action
'Mid-cap' bonus	
% eligible costs allocated to 'Midcaps' established in the EU (or NO) \geq 15%	+10% for the activity
SME Bonus	
% eligible costs allocated to 'SMEs' established in the EU (or NO) \geq 10%	% of eligible costs allocated to ' non cross-border SMEs ' established in the EU or NO (maximum 5%) + 2 x % of eligible costs allocated to ' cross-border SMEs ' established in the EU or NO

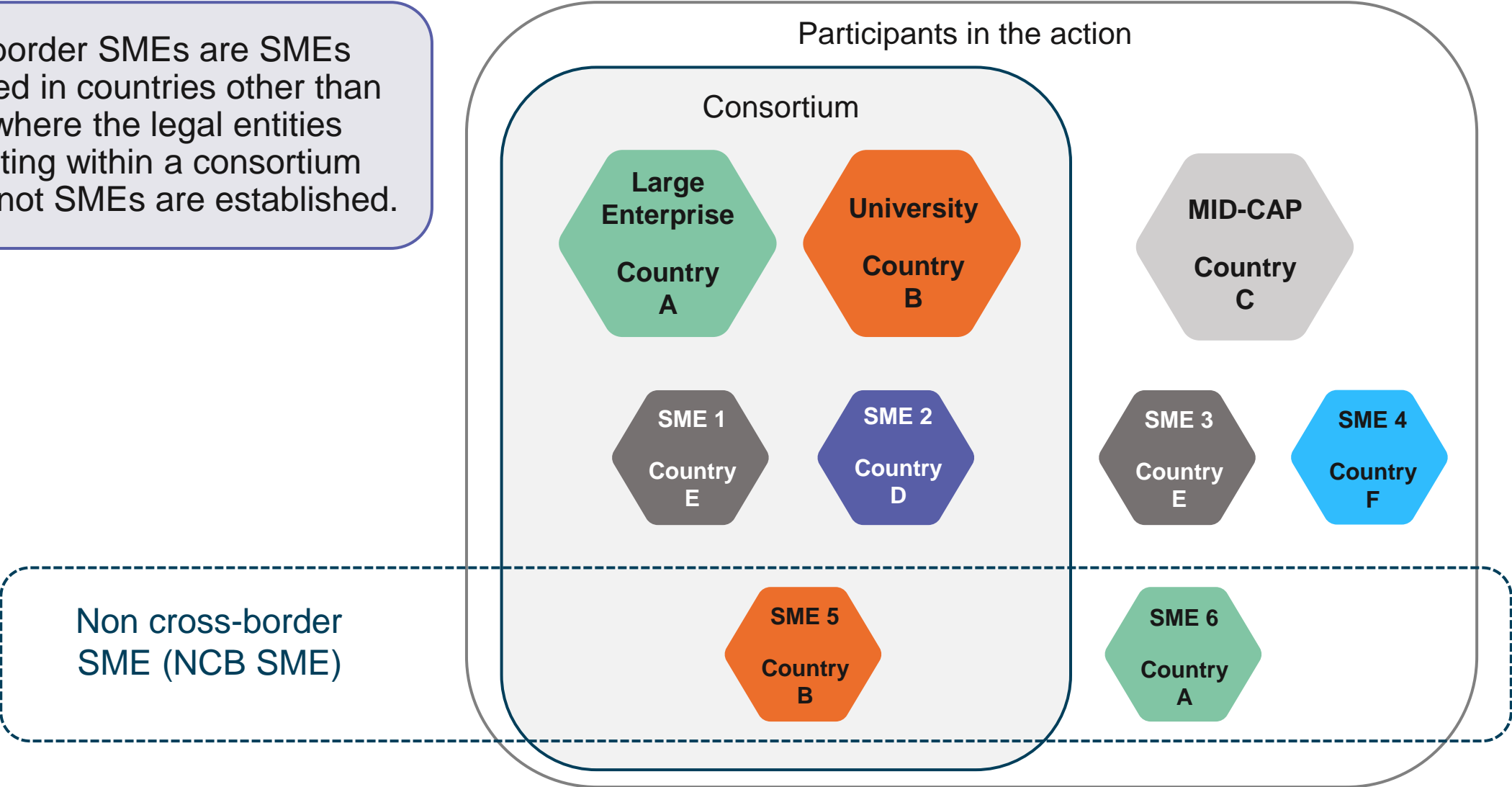
Cross-border and non-cross-border SMEs

Cross-border SMEs are SMEs established in countries other than those where the legal entities cooperating within a consortium which are not SMEs are established.



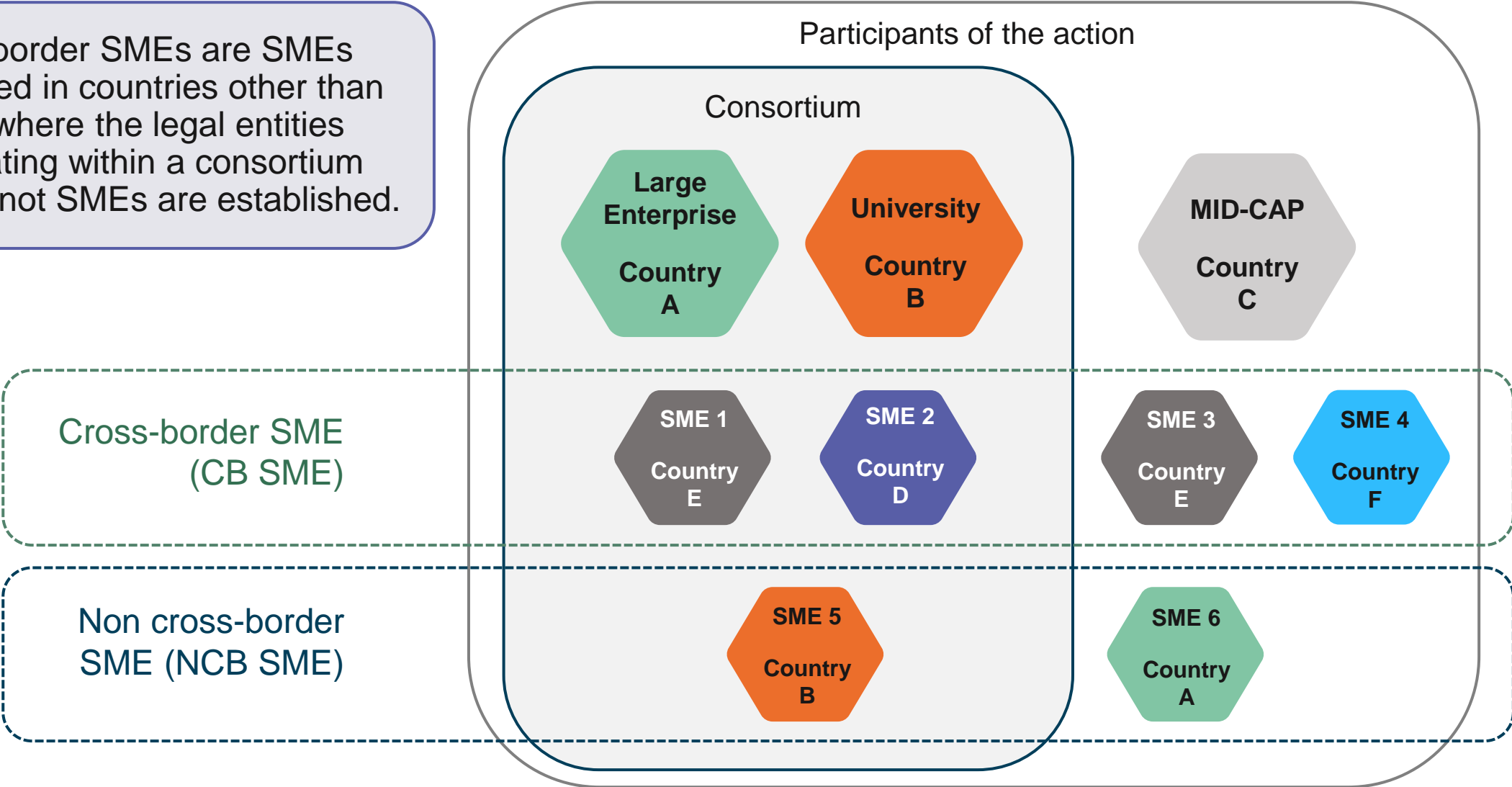
Cross-border and non-cross-border SMEs

Cross-border SMEs are SMEs established in countries other than those where the legal entities cooperating within a consortium which are not SMEs are established.



Cross-border and non-cross-border SMEs

Cross-border SMEs are SMEs established in countries other than those where the legal entities cooperating within a consortium which are not SMEs are established.



The bonus system: example

Project

Consortium of 4 types of beneficiaries

Activity type: **Prototyping**

No link with PESCO

Bonus calculation

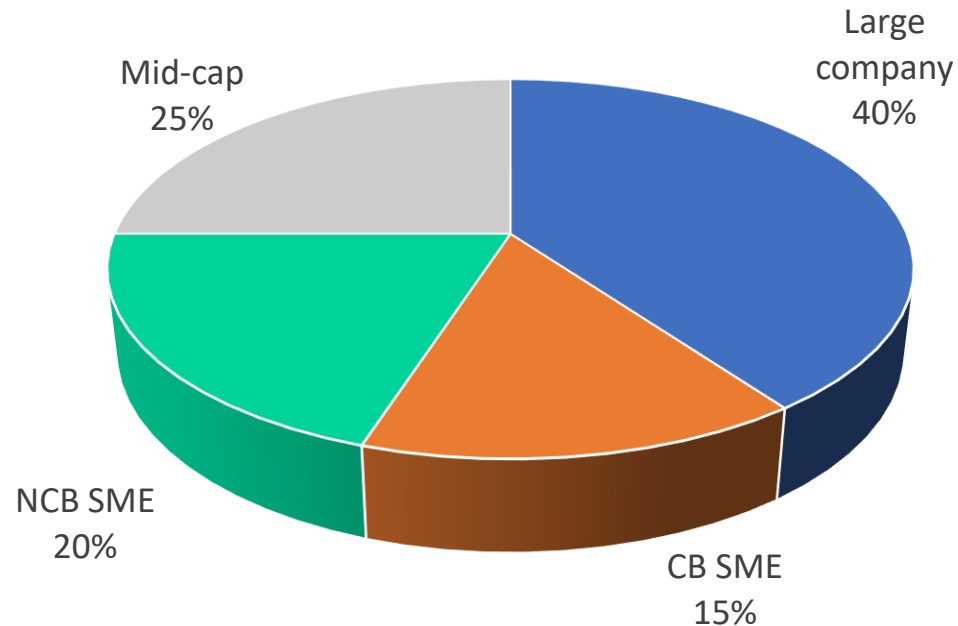
Activity type	EU baseline funding rate
Prototyping	20%

BONUS



EU maximum funding rate

% eligible costs



The bonus system: example

Project

Consortium of 4 types of beneficiaries

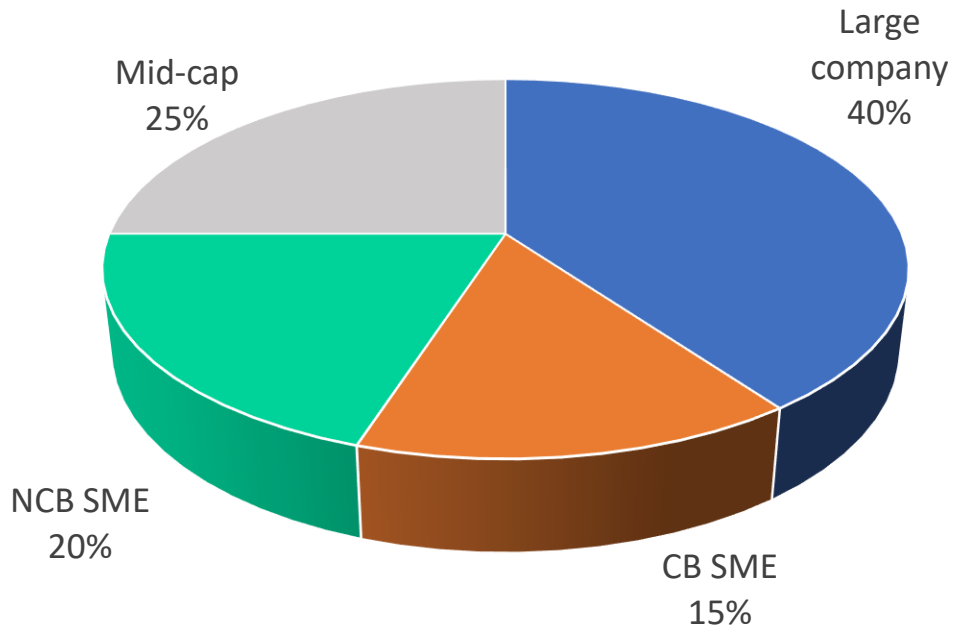
Activity type: **Prototyping**

No link with PESCO

Bonus calculation

Activity type	EU baseline funding rate	BONUS	EU maximum funding rate
Prototyping	20%	→	

% eligible costs



PESCO: No

0 %

Mid-cap: Eligible costs \geq 15 %

10 %

SME: Eligible costs \geq 10 %

NCB: Eligible costs = 20 %

5 %

CB: Eligible costs = 15 %

30 %

Total

45 %

The bonus system: example

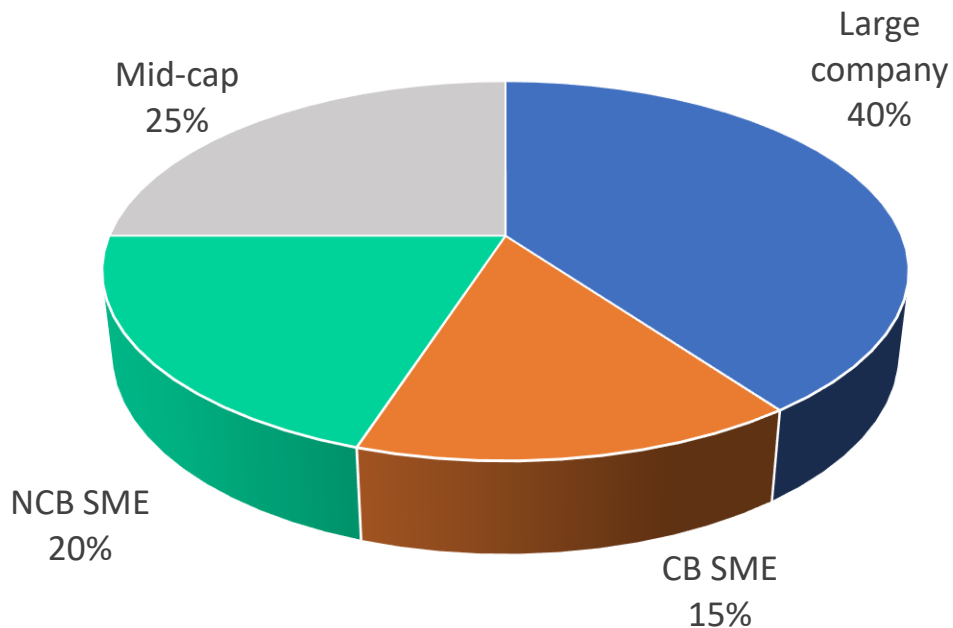
Project

Consortium of 4 types of beneficiaries

Activity type: **Prototyping**

No link with PESCO

% eligible costs



Bonus calculation

Activity type	EU baseline funding rate
Prototyping	20%

BONUS



EU maximum funding rate
55%

PESCO: No

0 %

Mid-cap: Eligible costs \geq 15 %

10 %

SME: Eligible costs \geq 10 %

NCB: Eligible costs = 20 %

5 %

CB: Eligible costs = 15 %

30 %

Total

~~45 %~~

Total BONUS

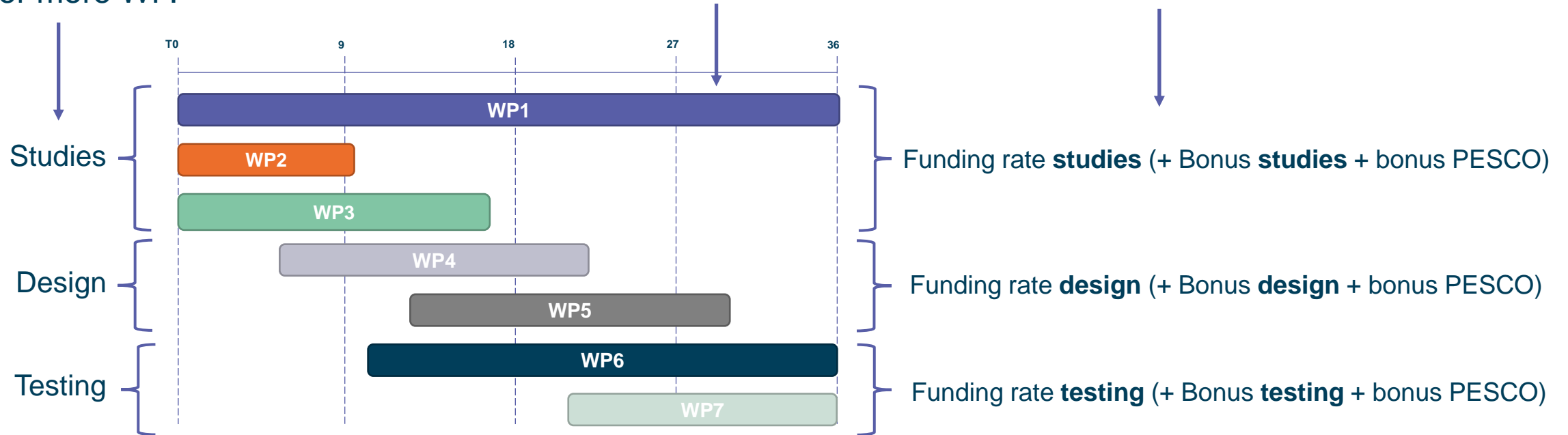
35 %

Activities and WP

One activity implemented through one or more WP.

Management and coordination (WP1) → Activity type Studies.

Funding rate and bonus established separately **for each activity** (except PESCO).



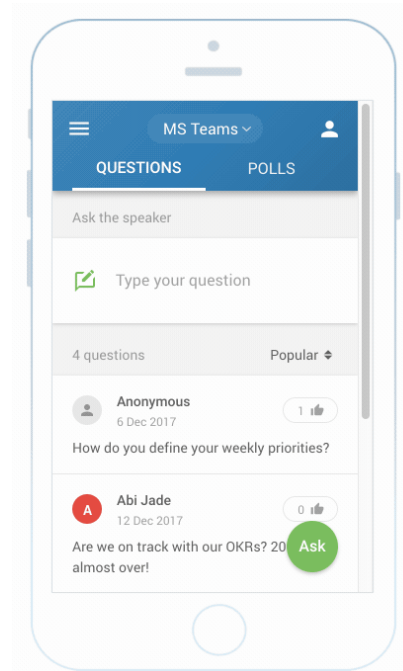
The detailed budget table **automatises the computation of the funding rates & bonus** based on the information and costs inputs of the applicants.

Q&A Time !

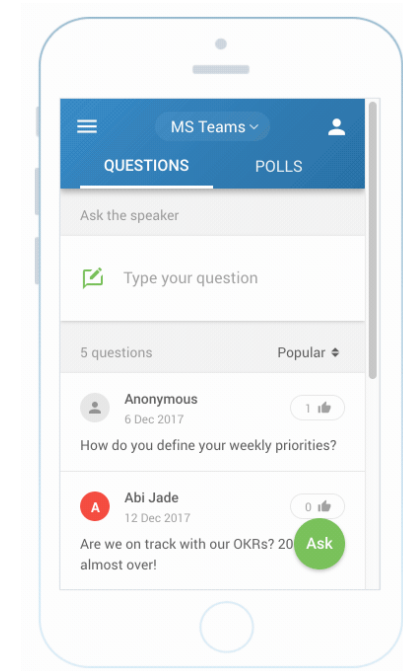


PASSCODE:
EDF-2024

- Scan the QR code
- Enter your name & event passcode
- Ask a question!



ASK A QUESTION



UPVOTE A QUESTION

**PREPARATION
OF PROPOSALS
SUBMISSION
PROCESS**

Preparation of proposals

Guillaume GALTIER

Policy Officer DEFIS A.2

EDF Implementation –

Programming and SME support

What is new compared to EDF 2023?

- 2 technological challenges
- SME coaching now offered to awarded SMEs of all calls for proposals
- 15 call topics flagged as contributing to the STEP objectives: may ease future access to EU funding
- Proposals will be classified SECRET UE/EU SECRET
- Specific eligibility conditions regarding security
- No submission on the F&T portal
- Call document and template (bearing specific security markings) available outside the F&T Portal

Ramp-up of EUDIS measures + STEP

EUCI Call: specific conditions and procedure

Evolutions in call document & templates

+ 6 tutorials



- Further clarifications / new elements added in the call documents regarding:
 - Eligibility conditions specific to development actions
 - Potential indirect management of the grants
 - Ethics
 - SME/mid-cap registration and self-assessment
 - Award criterion 5 on cross-border cooperation
 - Scoring scale
 - SME coaching
 - STEP
 - Liability regime
- Part B (technical description)
 - Structure of award criterion 5 on cross-border cooperation + definition (same as call document)
 - New declaration added regarding STEP
- Detailed budget tables
 - Further clarifications in the instructions
 - Validation & Export function improved
- **Actual indirect costs methodology declaration**
 - **Many clarifications added**
 - **Structure of the template updated (usual practices / adjustments)**
- Co-financing declaration
 - Clarification on when confirmation will be requested
- Procurement intent and technical specification
 - Clarification on absence of conditionality



Submission templates per call

Subm. templates \ Calls	RA	RA-SI	LS-RA-CHALLENGE	LS-RA-DIS	LS-RA-SMERO	LS-DA-SME	DA	DA-EUCI
Part A – Structured administrative information	To be filled in directly online in the submission system		General information Participants				S-UE/EU-S R-UE/EU-R if alone	
	Summary budget table (costs per cost categories for each Partner/AE)	Simplified budget table (requested grant amount per Partner/AE)			Simplified budget table (requested grant amount per Partner/AE)		Summary budget table (costs per cost categories for each Partner/AE)	n.a.
	Other questions (Ethics - separate guidance available)							Ethics: Annex to Part B
Part B – Technical description	Standard EDF form (sections relating to award criteria 6 & 7 and to higher funding rate not applicable to research actions (i.e. RA*); declaration relating to spin-in only relevant for call RA-SI)							S-UE/EU-S
Detailed budget table	EDF RA (macro-enabled file)	EDF LS RA (macro-enabled file)			EDF LS DA (macro-enabled file)		EDF DA (macro-enabled file)	R-UE/EU-R if alone
Actual indirect cost methodology declaration	Same template for all calls (only for Partners and AE opting for actual indirect costs)							To be downloaded from specific webpage, filled in offline and transmitted by certified courier to DG DEFIS
Participant information	To be downloaded from submission system, filled in offline and uploaded on the submission system as a single password-protected zip archive							
List of infrastructure, facilities, assets and resources	Same template for all calls							
Ownership control declaration	Same template for all calls (separate guidance available)							Unclassified if alone
Cofinancing declaration	n.a.			Same template for all Development calls (only if funding rate <100%)				Or classification under national responsibility
Harmonised capability declaration	n.a.			Same template for all Development calls (only if design activities)				
Declaration on procurement intent and common specifications	n.a.			Same template for all Development calls (only if prototyping, testing, qualification or certification activities)				
PRS declaration	Same template for all calls (only if access to PRS information needed to perform the action – not expected for the call LS-RA-CHALLENGE)							
FSC and CIS accreditation statements (no template)	n.a.							Classification under national responsibility

Part A – Structured administrative information

To be filled in directly **online** (in the submission system)

- Basic information on the proposal
 - Acronym, title, duration, free keywords, abstract...
- Declarations
- Administrative information on partners (i.e. members of consortium), affiliated entities and associated partners (information on subcontractors is not requested)
 - **All declared participants need first to register their entity to get a PIC (Participant Identification Code)**
- Budget table
 - Summary budget table for RA, RA-SI and DA calls (to be filled in with values from *Detailed budget table – sheet Summary per applicant*). Round amounts to nearest euro where needed.
Nota: summary budget tables will display a fake funding rate of 100% for Development actions.
 - Simplified budget table for LS calls (to be filled in with EU Requested contributions from *Detailed budget table – sheet Summary per applicant*)
- Other questions: **Ethics**
 - Table with YES/NO questions/sub-questions
 - Where the answer is YES
 - a reference to the page(s) of the proposal where further information can be found
 - additional information to be provided in a self-assessment table

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dedicated tutorial!



[Read specific guidance on Ethics!](#)

Part B – Technical description of the action

- **Basic information**
 - Project name & acronym, coordinator contact, type of project, type of activities addressed
- **Project summary** (max 3 pages)
- Focus on each of the **award criteria**
 - 6 criteria for Research actions, 8 for Development actions
 - Description of each **Work package** integral part of award criterion “Implementation” and included in page limit
- **Security**
- **Declarations**
 - Higher funding rate (for Development actions only), Project manager, Galileo PRS, International law, Lethal autonomous weapons, Background information and results, Spin-in results, Previous activities, Double funding, Financial support to third parties, STEP/Sovereignty Seal
- **Respect page limits:** pages exceeding limits will be made invisible to the evaluators
 - 100 pages for entire part B, including work package description, but excluding Annexes



*To be included as a **single pdf file** inside the password-protected zip archive to be uploaded in the submission system*



STEP: what is it about?

- STEP: Strategic Technologies for Europe Platform
 - EU initiative to support EU industry and boost innovation in critical technologies
 - Steer resources across 11 EU funding programmes (including EDF, reinforced with 1.5B€)
 - 3 targeted investment areas
 - digital technologies and deep-tech innovation
 - clean and resource efficient technologies
 - biotechnologies
- 15 topics from EDF WP 2024 are deemed, by design, to contribute to the STEP objectives
 - Identified by suffix '-STEP' in the topic ID
 - No impact on submission and evaluation (same as any other EDF topic)
- What benefits to expect (from an EDF perspective)?
 - Applicants with proposals scoring above threshold will be awarded a **STEP Seal***
 - Enhance better access to EU funding, notably by facilitating alternative cumulative or combined funding from several EU budget instruments
 - Possible promotion on the STEP portal

Detailed budget table

(Annex to Part B)



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INFO
DAYS | 20
24

Macro-enabled Excel file (do not wait last moment to test it!)

- Use file relevant to your call (RA, DA, LS-RA, LS-DA) → see section 5. *Admissibility and documents* of the Call document
- If needed, ask support of your IT administrator to authorise macros

Budget tables generated automatically based on information provided (Call & Topic & PESCO, Participants & Indirect costs, Activities & WP)

- Bonus calculation (development actions only) and quantitative information for award criterion 5 computed automatically
- Information can be changed at any step with little or no impact on other data

Must contain all estimated eligible costs of the proposed action (including costs for subcontracting) and estimated costs for associated partners (if any)

- Detailed information per WP and per BE/AE for LS-RA and LS-DA
- Some information on resources per activity for DA, per action for RA

Includes completeness and consistency checks: does not substitute your own checks and further assessment by the Commission

Data from sheet “Summary per applicant” to be reported in Part A

To be included as a **single file** (1 file for the entire project), in both **xlsx** and **pdf** formats (automatically generated by the macro), inside the password-protected zip archive to be uploaded in the submission system

Actual indirect cost methodology declarations

(Annex to Part B)

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24



Template as evolved significantly compared to previous years



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1 declaration to be filled in by each partner and affiliated entity opting for the actual indirect costs regime

Consists in:

- a declaration providing information on **methodology used**
- a table providing the **amount and nature of the total indirect costs charged to the project according to your usual accounting practices**
- **a table listing (negative) adjustments (if any)** to exclude costs that are ineligible under EU grants
- a **confirmation** to be signed by **competent national authorities**

Each part needs to be duly completed, form needs to be signed (including by national authorities) and provided with your application before the submission deadline

*To be included as **pdf file(s)** (1 file for each partner/affiliated entity opting for the actual indirect costs regime) inside the password-protected zip archive to be uploaded in the submission system*

Participant information

(Annex to Part B)

- To be filled in by each partner including their affiliated entities in order to assess their **operational capacity**
 - General information, description, key staff involved in the action, previous projects or activities, justification of involvement of affiliated entities and associated partners
 - General information and description of each subcontractor involved in the action must be included

*To be included as **pdf file(s)** (1 file per partner/affiliated entity or assembled as a single file) inside the password-protected zip archive to be uploaded in the submission system*

List of infrastructure, facilities, assets and resources

(Annex to Part B)

- Information needed to assess the eligibility of the participants to the action
- Consists in listing all infrastructure, facilities, assets and resources to be used by the partners, affiliated entities and subcontractors involved in the action **to carry out the action**
 - Description, owner, location
 - Justification if location is outside the EU and Norway
 - Information on security clearance (if needed)



*To be included as **pdf file(s)** (1 per participant or assembled as a single file) inside the password-protected zip archive to be uploaded in the submission system*

Ownership & Control declaration

(Annex to Part B)



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INFO
DAYS | 20
24

- Information **needed to assess eligibility (control)** of:
 - partners
 - affiliated entities
 - subcontractors involved in the action
 - associated partners
- Supporting documents, including **guarantees** in case of control, will be requested after the submission deadline
 - Template for the guarantees, to be approved by competent national authorities, is provided in the form, but authorities can use their own (as long as it provides the same level of detail and information)
- Read available specific guidance

***Nota:** public bodies that are already validated by CVS do not have to fill in the form but will automatically be considered as controlled by their country*

*To be included as **pdf files** (1 per participant, be it controlled or not) inside the password-protected zip archive to be uploaded in the submission system*

Co-financing declaration

(Annex to Part B)

- **Eligibility condition for Development actions (DA and LS-DA) only**
 - To be provided only if EDF financial support does not cover all eligible costs of the action (i.e. funding rate including bonus < 100% of eligible costs for at least one of the activities covered by the action)
- **Co-financing** can come from Member States/Norway or from other legal entities
 - Amount to be contributed must allow to assess that the rest of the costs will be covered by other means of financing
 - No need for confirmed financial commitment at the stage of application
 - **Confirmation will be requested** during GAP
- **Template provided**
 - But co-financers can use their own (e.g. Letter of Intent) as long as it provides the **same level of detail and information**

*To be included as **pdf file(s)** (1 file per co-financer or 1 joint declaration) inside the password-protected zip archive to be uploaded in the submission system*

Harmonised capability declarations

(Annex to Part B)

- **Eligibility condition for Development actions (DA and LS-DA) only**
 - To be provided only if project proposal covers “**design**” activities
- Declaration that the project proposal is based on **Harmonised defence capability requirements jointly agreed by at least 2 Member States/Norway**
 - confirmation of requirements to be provided with the application or, if the project proposal also covers “studies” aiming at defining those requirements,
 - confirmation of requirements to be provided during the implementation of the action before start of “design” activities + Harmonised defence capability requirements expected to be identified as an outcome of the “studies” activities.
- **Template provided**
 - But MS/NO can use their own (e.g. Letter of Intent, Memorandum of Understanding) as long as it provides the **same level of detail and information**

Nota: in any case, official Member States/Norway support must be provided at submission stage

*To be included as **pdf file(s)** (1 file per MS/NO jointly agreeing on the requirements or 1 joint declaration) inside the password-protected zip archive to be uploaded in the submission system*

Declarations on procurement intent and common specifications (Annex to Part B)

- **Eligibility condition for Development actions (DA and LS-DA) only**
 - To be provided only if project proposal covers “**prototyping**” or “**testing**” or “**qualification**” or “**certification**” activities

- Declaration that:

- At least 2 Member States/Norway intend to procure the final product or use the technology in a coordinated manner, including through joint procurement where applicable

Nota: intention cannot be conditioned to any event other than the selection of the project for EDF funding

- The project proposal is based on **Common technical specifications jointly agreed by the Member States/Norway that intend to jointly procure the final product or jointly use the technology**

- confirmation of specifications to be provided with the application
- or, if the project proposal also covers “design” aiming at defining those specifications,
- confirmation of specifications to be provided during the implementation of the action before start of downstream activities + Common technical specifications expected to be identified as an outcome of the “design” activities

Nota: in any case, official Member States/Norway support and intention to procure or to use the technology/final product must be provided at submission stage.

- **Template provided**

- But MS/NO can use their own (e.g. Letter of Intent, Memorandum of Understanding) as long as it provides the **same level of detail and information**

*To be included as **pdf file(s)** (1 file per MS/NO jointly agreeing on the specifications and intending to procure/use or 1 joint declaration) inside the password-protected zip archive to be uploaded in the submission system*

PRS declaration

(Annex to Part B)

- To be provided by each participant requiring access to Galileo PRS information in order to carry out the proposed action
 - If no access to Galileo PRS information is needed to perform the action, no need to provide the form
- Need for approval and signature by the Competent PRS Authority (CPA) designated by the Member State where the participant concerned is established
 - **Important to anticipate contact with relevant authority**

*To be included as **pdf file(s)** (1 for each participant requiring access to PRS information) inside the password-protected zip archive to be uploaded in the submission system*

Submission process

Kristiina URPALAINEN-MENON

Call Coordinator DEFIS A.4
EDF Implementation – Defence
systems

EU Funding and Tenders Portal

Due to technical constraints, EDIRPA and ASAP appear on the Portal under EDF Programme. However, these are all separate programmes with different conditions

The screenshot displays the EU Funding & Tenders Portal interface. At the top, the European Commission logo and the portal title are visible. A navigation bar includes links for Home, Funding, Procurement, Projects & results, News & events, Work as an expert, and Guidance & documents. The 'Funding' and 'Guidance & documents' menus are circled in red. A search bar is located on the right side of the navigation bar. Below the navigation bar, the 'Calls for proposals' section is visible on the left, followed by a 'Filters' sidebar. The 'Filters' sidebar includes a 'Quick search' field and several filter categories: 'Programming period', 'European Defence Fun...', 'Submission status', and 'All filters'. The 'European Defence Fun...' filter is highlighted with a yellow box and shows a count of 35 items. On the right side, the 'Guidance & Manuals' section is visible, featuring tabs for 'Funding' and 'Procurement', and a list of reference documents including 'Online Manual (2021-2027)' and 'H2020 Online Manual (2014-2020)'. A 'Forthcoming' button is also present at the bottom right of the page.

EDF Call Topic page

INFO DAYS | 2024

European Commission | EU Funding & Tenders Portal

Home Funding Procurement Projects & results News & events Work

Topic conditions and documents

1. **Admissibility conditions:** described in section 5 of the call document [↗](#)
2. **Eligible countries:** described in section 6 of the call document [↗](#)
3. **Other eligibility conditions:** described in section 6 of the call document [↗](#)
4. **Financial and operational capacity and exclusion:** described in section [↗](#)

Home > Funding > Calls for proposals > Non-thematic research actions targeting disruptive technologies for defence

Non-thematic research actions targeting disruptive technologies for defence

EDF-2024-LS-RA-DIS-NT

Topic Call for proposal

Internal navigation

- General information
- Topic description
- Conditions and documents
- Partner search announcements
- Start submission
- Topic Q&As
- Get support

General information

Programme
European Defence Fund

Call
Non-thematic research actions targeting disruptive technologies for defence

Type of action
EDF-LS EDF Lump Sum Grants

Deadline model
single-stage

Planned opening date
20 June 2024

Templates for proposals should be downloaded from the Submission System (available at the opening of the call), the links below are examples only:

- EDF Standard [↗](#) application form [↗](#)
- Detailed budget table (EDF LS RA) [↗](#)
- Participant information [↗](#) (including previous projects, if any)
- List of infrastructure, facilities, assets and resources [↗](#)
- Actual indirect cost methodology declarations [↗](#) (if actual indirect costs are used)
- Ownership control declarations [↗](#) (including for associated partners and subcontractors)
- PRS declaration [↗](#) (if the project requires access to Galileo PRS information)

EDF, ASAP and EDIRPA Lump Sum MGA — Multi & Mono V1.0 [↗](#)

Topic Q&As

32 item(s) found

Under EDF, as an entity established in a non-associated third country, can I apply for funding?
As recalled in the call document (see section 6. Eligibility / Eligible participants (eligibility criteria))

Under EDF, does depreciation always apply to the eligible cost for equipment used in the context of prototyping?
As a general rule, only depreciation costs are eligible under EDF. In development and prototyping phases, the eligible costs are limited to the depreciation costs of the equipment used in the context of prototyping.

Under EDF detailed budget table annex, the "Add line" buttons are preventing us from filling in the detailed sheet per BE/AE. Why is this happening?
This happens when applicants using Office 365 do not activate the "Compatibility mode" in their browser.

#EUDefenceIndustry

IS

Call Document – main reference

Download the call document for more convenience



CALL FOR PROPOSALS

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Step-by-step Submission process

Partner search tool

1. **Admissibility conditions:** described in section 5 of the [call document](#) [↗](#)

Proposal page limits and layout: described in Part B of the Application Form available in the Submission System

2. **Eligible countries:** described in section 6 of the [call document](#) [↗](#) ...

▼ Show more

Partner search announcements

14

Searches of partners to collaborate on this topic

View / Edit

LEARs, Account Administrators or self-registrants can publish partner requests for open and forthcoming topics after logging into this Portal, as well as any user having an active public Person profile.

Start submission

The submission system is planned to be opened on the date stated on the topic header.

Topic Q&As

34 item(s) found

[General FAQ](#)

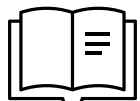


Filter...

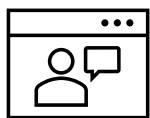
Step-by-step Submission process

- Registration as a participant

- All participants need to be registered through the Funding and Tender Portal using a PIC (Participant Identification Code)
- You can create a new PIC or find an existing PIC through the Portal



<https://webgate.ec.europa.eu/funding-tenders-opportunities/display/IT/Regist+an+organisation>



<https://youtu.be/VuNI478WEtU>

Home > Funding > Participant Register

Participant Register

The participant register is now multilingual! Select your preferred language from the top right corner of the Portal.

If you want to participate in a call for proposals or in a call for tenders with eSubmission, your organisation needs to be registered and have a 9-digit Participant Identification Code (PIC). Please quote your PIC in all correspondence with the Commission.

The register contains all participants of EU programmes.

Is your organisation already registered? PIC search

Please check whether your organisation has already been registered. If so, no need to register it again.

Find a registered organisation

Register your organisation

To register your organisation or as a natural person, you need to login into the Portal or, if you are a new user, create your account.

Check what information you need to register in the Online Manual - and keep it to hand during the registration procedure. To start registration, click on the button below.

Register your organisation

You can suspend the registration process at any time: the data entered can be saved as draft and you can continue your registration later. To return to your registration, please log in and get into My Organisation(s) in the My Area section. Incomplete, draft registrations are automatically deleted after one year.

Step-by-step Submission process

- SME/Midcap status

Watch our dedicated tutorial!

SME status

- eligibility condition in **EDF-2024-LS-DA-SME** and **EDF-2024-LS-RA-SMERO**
- grounds to a funding bonus in Development calls
- used in assessing proposal against award criterion 5

- *Access the Participant Register, log on into the Funding & Tenders Portal, go to “My Organisation(s)”. Click on the “Actions” and select “Modify organisation”.*
- *Go to the “SME” tab and click on “Start SME self-assessment” to start the SME questionnaire.*

Start SME self assessment

SME 1

Provide information about your SME status. Carry out the **SME Self-Assessment** below or provide the **SME Self-Declaration** (Yes/No). When using the Self-Declaration, please check the [Commission definition of SMEs](#) before. The SME Self-Assessment is mandatory for some actions, like the SME instrument topics, for which the SME status is an eligibility criterion.

For more information on the SME instrument, see the [Online Manual](#).

SME information is NOT obligatory if you are applying only for the Erasmus+, Creative Europe, Europe for Citizen or EU Aid Volunteer programmes.

SME data

The table below presents your existing SME data.

Year	Result	Type	Details	Closing date	Status
2017	SME	Self-assessed		21/08/2017	

SME Self-Assessment 2

In some Horizon 2020 calls (specified in the topic conditions and submission system) the SME Self-Assessment is mandatory and the lack of it may block your submission. Find additional information about the SME Self-Assessment on the [IT HOW TO wiki](#).

[Continue SME self assessment](#) [Start SME self assessment](#)

SME Self-Declaration 3

If the SME Self-Assessment is not necessary in your case (e.g. for the Education, Audio-visual and Culture programmes), use the declaration below.

I declare my organisation as

SME Non SME as from



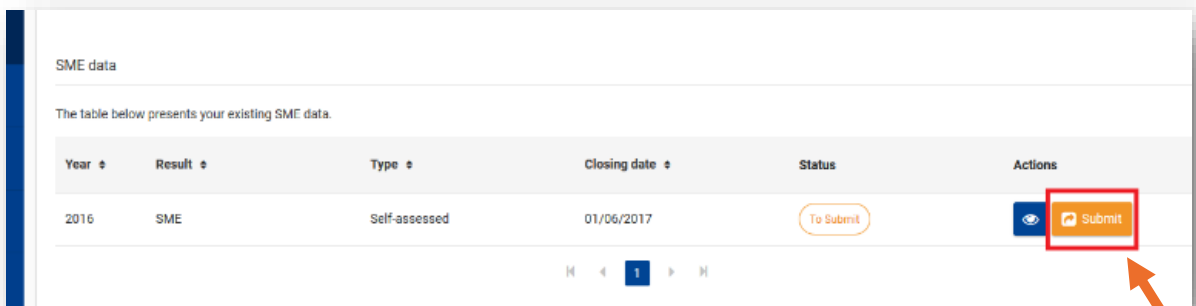
SME self-declaration is not sufficient

Step-by-step Submission process

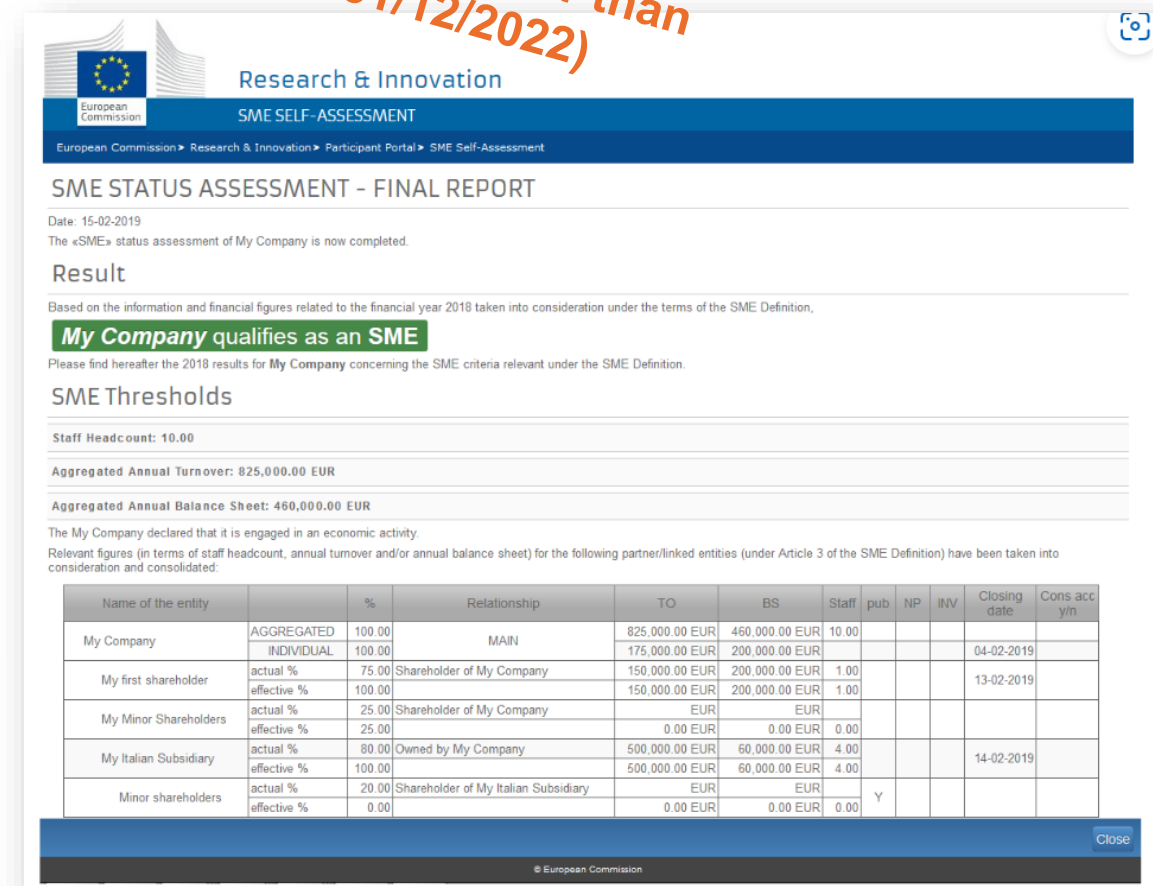
- SME/Midcap status

- OR If there is no recent SME self-assessment information available in the Participant Register, the Portal Submission System will automatically prompt to go through the SME self-assessment wizard to establish your SME status
- You will need to enter the financial figures of the last approved accounting period of your organisation and of any other organisation that might be directly or indirectly related to you to confirm your SME status.

See [SME wizard](#) for guidance



Use latest data available (and not older than 31/12/2022)



Final validation will be performed by the Central Validation Service during Grant Agreement preparation

Step-by-step Submission process

Mid-cap self registration

For Midcap assessment, complete the SME self-assessment first, in order to be able to **self-declare as a Mid-cap**

Aydin
PIC 922566516

Organisation Data Legal Information Authorised users / LEAR Bank Accounts Financial capacity Messages Documents SME

SME data

The table below presents your existing SME data.

Year	Result	Type	Closing date	Status	Actions
2020	Not SME	Self-assessed	17/06/2021	To Submit	Submit Submit as not an SME Self-declare as Mid-cap

Note: Be aware that your entity will not be considered a mid-cap if 25 % or more of the capital or voting rights are directly or indirectly controlled, jointly or individually, by one or more public bodies.

Step-by-step Submission process

Research Organisation self-registration

Eligible participants in **EDF-2024-LS-RA-SMERO** must be small and medium-sized enterprises (SMEs) ... or research organisations (i.e. non-profit organisations which carry out research and/or technological development as their main objective)*

Registration steps

Table of contents

- Registration steps
 - Log into the Portal
 - Provide the organisation identification details
 - Provide the organisation data
 - Provide the legal information
 - Define the authorised users
 - Summary screen
 - Success screen

*The Central Validation Service will also check in the Grant Preparation phase whether your organisation qualifies for some of the special legal statuses (private or public body, non-profit...).

The screenshot shows a registration process flow with six steps: 1. Identification, 2. Organisation Data, 3. Legal Information, 4. Authorised Users, 5. Summary, and 6. Success. The first step, Identification, is currently active and contains the following form fields:

- Legal name * (text input, 240 characters)
- Registration country * (dropdown menu)
- Registration number * (text input, 50 characters)
- VAT number * (text input, 20 characters, with a toggle for "not applicable")
- Website * (text input, 500 characters)

Start submission process through the appropriate topic page (access to the submission platform)

Start submission

To access the Electronic Submission Service, please click on the submission-button next to the **type of action** and the **type of model grant agreement** that corresponds to your proposal. You will then be asked to confirm your choice, as it cannot be changed in the submission system. Upon confirmation, you will be linked to the correct entry point.

To access existing draft proposals for this topic, please login to the Funding & Tenders Portal and select the My Proposals page of the My Area section.

Please select the type of your submission:


EDF Development Actions [EDF-DA], EDF Action Grant Budget-Based [EDF-AG]

Start submission

 Need help?

Type of action: **EDF-RA**

Type of MGA: **EDF-AG**

 Topic and type of action can only be changed by creating a new proposal.

Step-by-step Submission process

Exceptionally for the Call for EDF Development actions, requiring proposals classified at **SECRET UE/EU SECRET** level (EDF-2024-DA-EUCI) submission is **not** through the Participant portal!*

Start submission

Submissions under this call will have to follow a specific procedure. Please refer to the [Call document](#) for more information.

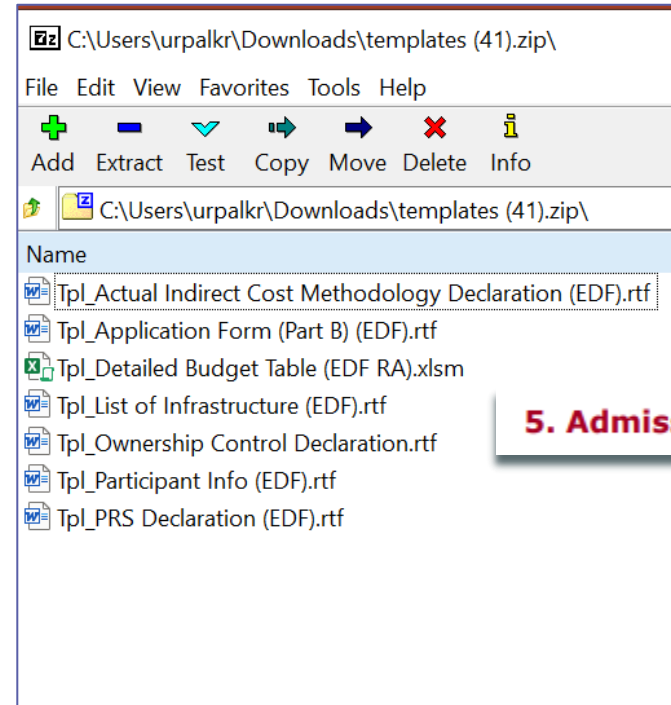
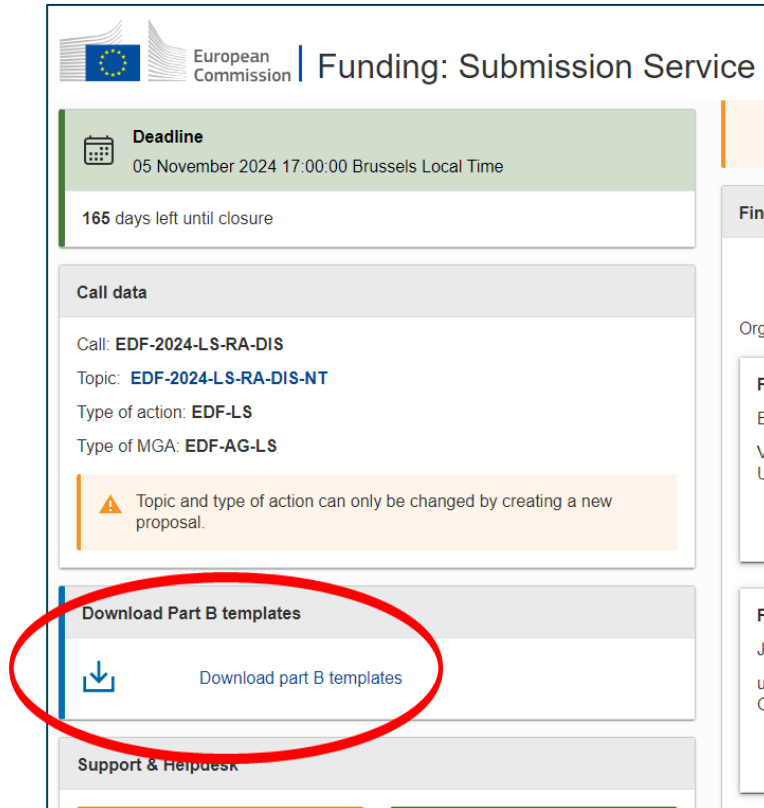
The screenshot shows the top navigation bar of the European Commission website. It includes the European Commission logo, a language selector set to 'EN', and a search bar. Below the navigation bar is a blue header for 'Defence Industry and Space' with a menu containing 'Home', 'About', 'Newsroom', 'EU Space', 'EU Defence Industry', 'EU Aeronautics Industry', and 'Funding opportunities'. The main content area shows a breadcrumb trail: 'Home > Funding opportunities > Calls for proposals > EDF-2024-DA-EUCI: Call documentation and application forms'. Below the breadcrumb, it says 'CALL FOR PROPOSALS | Upcoming' and the main title 'EDF-2024-DA-EUCI: Call documentation and application forms'.

https://defence-industry-space.ec.europa.eu/funding-opportunities-0/calls-proposals/edf-2024-da-euci-call-documentation-and-application-forms_en

Step-by-step Submission process

Template

- Download the Part B templates (check with Call Document Section 5. which ones apply)
- Fill in templates offline, assemble them in a single password-protected zip archive and upload it on the submission system at the end of the process



5. Admissibility and documents

Step-by-step Submission process

- Create your draft proposal
 - Select coordinator via PIC or short name
 - Your organisation needs to be registered on the [Participant Register](#) to get a PIC!
 - Indicate your role in the proposal
 - Choose an acronym for your proposal
 - Provide a short summary with no confidential information
 - Clicking to “Save and Go to Next step” will formally create your draft proposal
 - You will receive a confirmation email with a proposal ID

⚠ Please submit your proposal at the latest **48 hours before the deadline** (to avoid system congestion or system incompatibility issues). Late proposals will not be accepted. Don't wait until the end because you are worried about confidentiality – we will not open the proposals before the deadline.
You can submit the proposal as many times as you wish up until the deadline. Each new submitted version will replace the previous one.

Find your organisation

PIC ⓘ * Short name ⓘ * 228

Organisations you have been previously associated with. (Click to select)

Your proposal

It will appear also in the "General Information" section of the Application Form Part A and can also be updated there.

Acronym * 7

Short Summary * 1966

Step-by-step Submission process

Terms and conditions, confirmation

Terms and Conditions for the Submission of Applications

Please read and accept this disclaimer to proceed with the creation of your draft proposal:

Proposal data

1. Confidentiality: Applications (and any additional information provided for the award) will be considered confidential and treated according to the same principles as those set out in the grant agreement. We may in particular have to share applications with other EU institutions and bodies in order to perform the pre-award checks required by the EU Financial Regulation. Please also be aware that we may have to publish the information contained in the Abstract/Short Summary and Keywords in Part A. Please avoid adding confidential information in that section.

2. Access to pre-registration data: Please be aware that certain information from the draft proposal will be accessed by us before the call deadline, in order to plan the evaluation. This information includes the topic ID, type of action ID, participant identification code (PIC), project acronym, abstract and keywords.

I agree that the pre-registration data becomes available to the European Commission services prior to call closure.

I wish that the pre-registration data does not become available to the European Commission services prior to call closure. (Applicants are advised to use this option only in well justified cases, as it hinders the planning of the evaluation process and the timely processing of proposals).

Technical requirements

3. Part B file format: Part B of the Application Form (Technical Description) must be uploaded as PDF (equivalent to Adobe Acrobat v5 or higher, with embedded fonts).

4. Part B page limits: Applications are subject to the page limits set out in the call conditions. Excess pages will be made invisible and not available to the evaluators. Mandatory annexes and supporting documents do not count towards the page limit.

5. Time constraints: Preparation and uploading of the files in the Submission System may take some time. Don't wait until the end. Problems due to last minute submissions (e.g. congestion, etc) will be entirely at your risk.

Submission

6. Applications must be submitted before the call deadline. You can withdraw your application or make changes to it, provided this is done before the call deadline. Submission of a new application overwrites the previous version.

Personal Data

7. Personal data linked to the application, evaluation or award of grants, prizes and contracts will be processed in accordance with the [Funding & Tenders Portal Terms and Conditions and Privacy Statement](#)

Cancel OK

Preregistration information is minimal information on the proposal (coordinator, partners, acronym, summary) to allow the Commission to plan the evaluation

Europa / Funding & Tenders Portal notification

Dear Proposal Participant,

You have successfully created a draft proposal in the Funding & Tenders Portal Submission System:

Proposal acronym : EDF-2024 Test
Draft proposal ID : SEP-211056290 (a final Proposal ID will be assigned as soon as the proposal is submitted)
Call : EDF-2024-LS-RA-DIS
Type of action : EDF-LS
Topic : EDF-2024-LS-RA-DIS-NT
Call closure : 2024-11-05 17:00:00

You can review, edit and submit your proposal at any time from [My Proposals](#) tab (<https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/myarea/proposals>) in the [Funding & Tenders Portal](#).

Draft proposal EDF-2024 Test created

Dear Kristiina URPALAINEN-MENON,

You have successfully created a draft proposal **EDF-2024 Test** for the call **EDF-2024-LS-RA-DIS**.

You can continue editing your draft proposal now or access it at a later time, but before the deadline of **05 November 2024 17:00:00 (Brussels Local Time)** from the [Funding & Tenders Portal](#) by accessing the [My Proposals](#) tab.

An email containing this information has been sent to this email address: **Kristiina.URPALAINEN@ec.europa.eu** (which is associated with your EU Login account **urpalkr**).

[Go to My Proposals](#)

[Continue with this proposal](#)

Step-by-step Submission process

Partners

- Add your partners, affiliated entities and associated partners
 - All of them need to be registered in Participant Portal in order to have a PIC!

Warning ✕

Please be aware that the organisation you have chosen will be automatically notified at submission about their involvement in the proposal. Do you want to continue?

Test Public Entity ESP

1 ✎ Test Public Entity ESP

Test Public Entity ESP
Madrid, ES
PIC: 878480404

Contacts 1 ℹ

Main contact ✎ ▾
Test User EDIRPA ESP

Contact persons in the selected partners will receive an email informing that the entity has been included in one proposal

Administrative Forms ✕

The coordinator has the rights to edit all sections of the administrative form, the participants can only update their relevant sections - including the budget form.

Note that participants and other coordinator contacts may also update the form while you are editing it, with the last-saved having priority.

Always re-check the content for correctness prior to submission.

Data which is pre-populated in the administrative forms from the Participant Register is read-only and cannot be changed. If you consider that a change is necessary then please follow the existing procedure to request an update via Participant Portal.

You will get limited warnings on eligible consortia and countries

⚠ The following organisations are not based in one of the eligible country groups

⚠ Call requires at least 2 participant(s) from different EU member states and associated countries, currently you have 1.

Step-by-step Submission process

Structured proposal information (Part A)

In this step you can edit the Administrative Forms and upload the proposal and its annexes. You may return to this step from the 'My Proposals' section of the Funding & Tenders Portal. Submit your proposal as early in the process as possible - you can update and resubmit an improved version many times before the call closure.

Submitting a proposal will overwrite any previous versions of this same proposal - this process is irreversible. Any changes made to the proposal will not be available to the European Commission service unless resubmitted.

Your proposal contains changes that have not yet been submitted.

Administrative forms (Part A)

Edit forms | View history | Print preview

< Exit form | Table of contents | General Information >

Table of contents | Validate form | Save form | Save & exit form

Type of Action: EDF-LS
(EDF Lump Sum Grants)

Proposal number: SEP-210998181

Proposal acronym: Test

Type of Model Grant Agreement: EDF Lump Sum Grant

Table of contents

Section	Title	Action
1	General information	Show
2	Participants	Show
3	Budget	Show
4	Other questions	Show

Proposal number that you'll need in "Detailed budget table" annex

Step-by-step Submission process

General Information (Part A)

< Table of contents General Information Participants & contacts >

Table of contents Validate form Save form Save & exit form

Application forms

Proposal ID SEP-211056290
Acronym EDF-2024 Test

1 - General information

Field(s) marked * are mandatory to fill.

Topic	EDF-2024-LS-RA-DIS-NT	Type of Action	EDF-LS
Call	EDF-2024-LS-RA-DIS	Type of Model Grant Agreement	EDF-AG-LS

Acronym * EDF-2024 Test

Proposal title * Max 200 characters (with spaces). Must be understandable for non-specialists in your field.
Note that for technical reasons, the following characters are not accepted in the Proposal Title and will be removed: < > * &

Duration in months *Estimated duration of the project in full months.*

Free keywords *Enter any words you think give extra detail of the scope of your proposal (max 200 characters with spaces).*

Abstract *

Short summary of the proposal here

Abstract *

The abstract should provide the reader with a clear understanding of the objectives of the proposal, how they will be achieved, and their relevance to the Work Programme. This summary will be used as the short description of the proposal in the evaluation process and in communications to the programme management committees and other interested parties. It must therefore be short and precise and **should not contain confidential information.**

Application forms

Proposal ID SEP-210998181

Acronym Test

Has this proposal (or a very similar one) been submitted in the past 2 years in response to a call for proposals under any EU programme, including the current call?

Yes No ?

PG ver 1.00 20231004

Page 2

Last saved 08/10/2023 10:53

Declarations

Field(s) marked * are mandatory to fill.

- 1) We declare to have the explicit consent of all applicants on their participation and on the content of this proposal. *
- 2) We confirm that the information contained in this proposal is correct and complete and that none of the project activities have started before the proposal was submitted (unless explicitly authorised in the call conditions).
- 3) We declare:
 - to be fully compliant with the eligibility criteria set out in the call
 - not to be subject to any exclusion grounds under the [EU Financial Regulation 2018/1046](#)
 - to have the financial and operational capacity to carry out the proposed project.
- 4) We acknowledge that all communication will be made through the Funding & Tenders Portal electronic exchange system and that access and use of this system is subject to the [Funding & Tenders Portal Terms and Conditions](#).
- 5) We have read, understood and accepted the [Funding & Tenders Portal Terms & Conditions](#) and [Privacy Statement](#) that set out the conditions of use of the Portal and the scope, purposes, retention periods, etc. for the processing of personal data of all data subjects whose data we communicate for the purpose of the application,

it, prizes and contracts (including financial transactions and understand and accept that the EU lump sum grants must be n that the detailed budget for the proposal has been factices and in compliance with the basic eligibility [Grant Agreement, art 6](#)) and exclude costs that are ineligible must be done taking into account best value for money

an organisation. Each applicant remains responsible for the information declared for be required to sign a declaration of honour.

False statements or incorrect information may lead to administrative sanctions under the EU Financial Regulation.

Step-by-step Submission process

Participants info (Part A)

Main contact person

The name and e-mail of contact persons are read-only in the administrative form, only additional details can be edited here. To give access rights and basic contact details of contact persons, please go back to step - Manage your related parties of the submission wizard and save the changes.

Title Ms Gender Woman Man Non Binary

First name Kristiina Last name [REDACTED]

E-Mail [REDACTED]

Position in org. Please indicate the position of the person.

Department SME Test Same as organisation name

Same as proposing organisation's address

Street Rue ABC, 3

Town Brussels Post code 8521

Country Belgium

Website Please enter website

Phone 123456789 Phone 2 +xxx xxxxxxxx

< General Information Budget >

Table of contents Validate form Save form Save & exit form

Application forms

Proposal ID SEP-210873440
Acronym TEST4REAL

2 - Participants

List of participating organisations

#	Participating Organisation	Legal Name	Country	Role	Action
1	FakeCompanyForTestingPurposes		Belgium	Coordinator	Show Participant's Details

Step-by-step Submission process

Participant information – special status for eligibility or bonus

- Coordinator should check that partners declared appropriate status and self-assessments have been performed

Organisation data	
PIC	Legal name
877951463	Test Public Entity BEL
Short name: Test Public Entity BEL	
Address	
Street	Test Street 4
Town	Brussels
Postcode	1000
Country	Belgium
Webpage	
Specific Legal Statuses	
Legal person	yes
Public body	yes
Non-profit	yes
International organisation	no
Secondary or Higher education establishment	no
Research organisation	no
SME Data	
Based on the below details from the Participant Registry the organisation is an SME (small- and medium-sized enterprise) for the call.	
SME self-declared status	31/12/2022 - yes
SME self-assessment	31/12/2022 - yes
SME validation sme	unknown

Specific Legal Statuses	
Legal person	yes
Public body	no
Non-profit	yes
International organisation	no
Secondary or Higher education establishment	no
Research organisation	yes

SME Data	
Based on the below details from the Participant Registry the organisation is not an SME (small- and medium-sized enterprise) for the call.	
SME self-declared status	28/03/2022 - no
SME self-assessment	28/03/2022 - no
SME validation sme	27/08/2008 - no

Mid-cap

Step-by-step Submission process

Budget in Part A

Application forms

Proposal ID SEP-210998181

Acronym Test

3 - Budget

Lump Sum Calls: simply insert the total requested grant amount by beneficiary from the Detailed Budget Table by

No	Name of Beneficiary	Country	Requested grant amount
1	Sme Test	BE	0.00
Total			0.00

Actual Cost Calls: More columns to fill in by beneficiary from the Detailed Budget Table annex

- Displayed funding rate for development action will systematically be 100% even if incorrect

- You can disregard right part of the table

Application forms

Proposal ID SEP-210873440

Acronym TEST4REAL

3 - Budget

No.	Name of beneficiary	Country	Role	Personnel costs - without volunteers EUR.	Subcontracting costs EUR.	Purchase costs - Travel and subsistence EUR.	Purchase costs - Equipment EUR.	Purchase costs - Other goods, works and services EUR.	Financial support to third parties EUR.	Internally invoiced goods and services EUR.	Indirect costs EUR.	Total eligible costs EUR.	Ineligible costs EUR.	Total estimated project costs and contributions EUR.	Funding rate	Maximum EU contribution to eligible costs EUR.	Requested EU contribution to eligible costs EUR.	Max grant amount EUR.	Income generated by the project EUR.	In kind contributions EUR.	Financial contributions EUR.	Own resources EUR.	Total estimated project income EUR.
1	Falsocompany for testing purposes	BE	Coordinator	0	0	0	0	0	0	0	0.00	0.00	0	0.00	100	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total				0	0	0	0	0	0	0	0.00	0.00	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Step-by-step Submission process

Other questions - Ethics

< Budget Other questions Validation result >

Table of contents Validate form Save form Save & exit form

Application forms

Proposal ID **SEP-211056060**

Acronym **test**

4 - Other questions

Ethics Issues Table

Section	Page
1. Human embryonic stem cells and human embryos	
8. Artificial intelligence	65,67
9. Other ethics issues	

Does this activity involve human embryonic stem cells (hESCs)?

8. Artificial intelligence

Does this activity involve the development, deployment and/or use of Artificial Intelligence-based systems? Yes No

if yes, detail in the self-assessment whether that could raise ethical concerns related to human rights and values and detail how this will be addressed.

9. Other ethics issues

Are there any other ethics issues that should be taken into consideration? Yes No

I confirm that I have taken into account all ethics issues above and that, if any ethics issues apply, I will complete the ethics self-assessment as described in the guidelines [How to Complete your Ethics Self-Assessment](#) ?

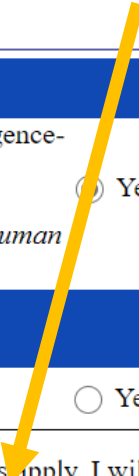
Ethics Self-Assessment ?

Ethical dimension of the objectives, methodology and likely impact

Explain in detail the identified issues in relation to:

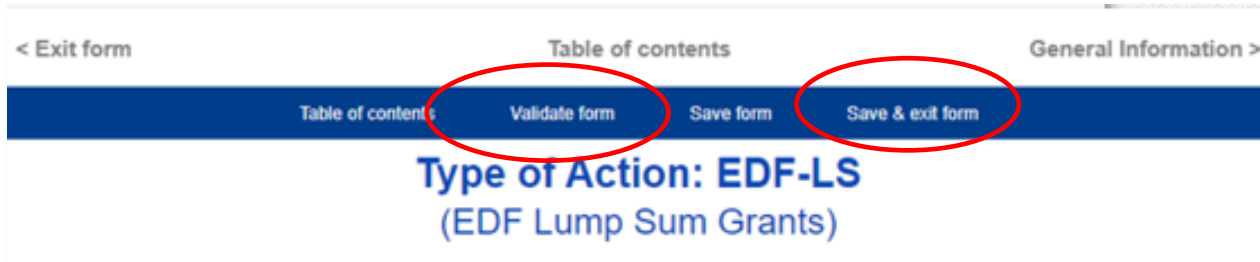
- objectives of the activities (e.g. study of vulnerable populations, etc.)
- methodology (e.g. clinical trials, involvement of children, protection of personal data, etc.)
- the potential impact of the activities (e.g. environmental damage, stigmatisation of particular social groups, political or financial adverse consequences, misuse, etc.)

Fill in using the Guidance



Step-by-step Submission process

Validation Result (Part A)



- Fill in each section of Part A
- Validate form to check errors and warnings
- Save and exit

Application forms

Validation result

Show Error The red 'Show Error' button indicates an error due to a missing or incorrect value related to the call eligibility criteria. The submission of the proposal **will be blocked** unless that specific field is corrected!

Show Warning The yellow 'Show Warning' button indicates a warning due to a missing or incorrect value related to the call eligibility criteria. The submission of the proposal **will not be blocked** (proposal will be submitted with the missing or incorrect value).

Section	Description
General Information	Title - missing entry
Budget	The total requested EU grant amount should not be zero.
General Information	Duration - missing entry
Declaration	Declaration 2 acceptance is missing
Declaration	Declaration 3 acceptance is missing
Declaration	Declaration 4 acceptance is missing
Declaration	Declaration 5 acceptance is missing
SME Test	Main Contact Position - missing entry
Budget	Requested grant amount is set to zero

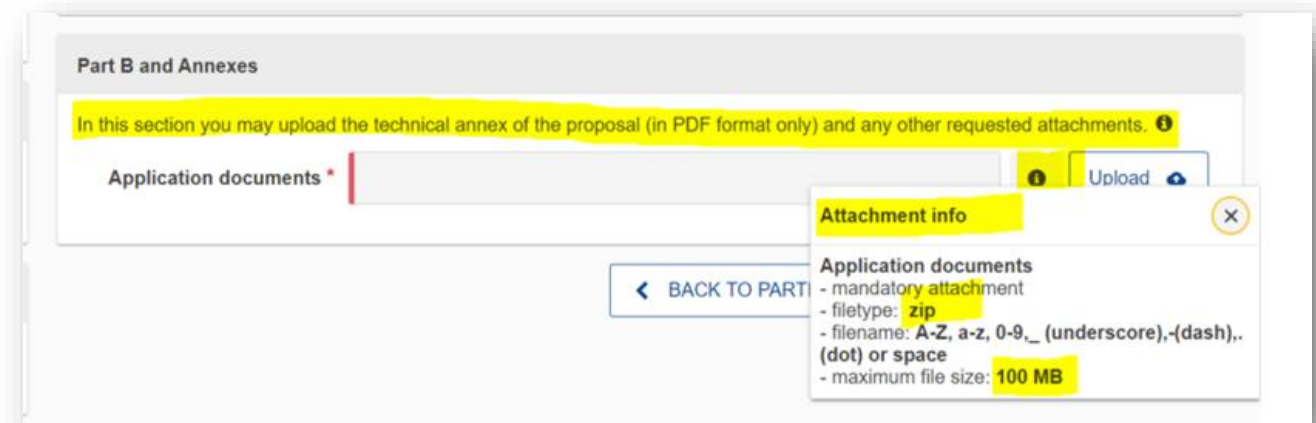
Administrative forms (Part A)

[Edit forms](#) [View history](#) [Print preview](#)

Step-by-step Submission process

Upload Part B and annexes

- Upload the **encrypted zip archive** containing Part B and all mandatory Annexes and supporting documents
 - Use AES-256 encryption for robust protection*
 - Make sure to include all necessary annexes (Detailed Budget Table Annex both .xlsx and .pdf formats)
- The zip archive must be **less than 100 MB**
- **Send the password of the uploaded zip archive** (and any other passwords used) to DEFIS-EDF-PROPOSALS-PWD@ec.europa.eu (with the proposal ID and the name of the zip archive).



* free and open source software (such as 7-zip) offer this option


Step-by-step Submission process

Submission, validations, confirmation, further editing



INFO
DAYS | 20
24

[← BACK TO PARTICIPANTS LIST](#) [VALIDATE](#) [SUBMIT](#)

Validations

 The following warnings will not block the submission of your proposal, but may affect its admissibility and eligibility during evaluation

Part A Form

Collapse all  Expand all 

Declaration 4 warnings



1. Declaration 2 acceptance is missing
2. Declaration 3 acceptance is missing
3. Declaration 4 acceptance is missing
4. Declaration 5 acceptance is missing

SME Test 1 warning

If you believe that your proposal is eligible even with these warnings, then you may enter an explanation below - this will be passed to the eligibility committee.

1000

OK

- When done, press SUBMIT: system will perform some validation checks
 -  • Errors → blocking
 -  • Warnings → not blocking but justification requested (you may still not be eligible/admissible)


Once submitted confirmation will be displayed and **you will receive a confirmation email**


➤ You can still:

Update your proposal

Download it to check content and e-receipt

Withdraw your proposal

 Your proposal was submitted on: 27 June 2022 16:12:24 (Brussels Local Time)

 Your proposal is part of call EDF-2022-DA. The call deadline is 24 November 2022 17:00:00 (Brussels Local Time). Your proposal ID is 101102066. This number is important and will be used as future reference during the evaluation process.

Revisit your proposal

You can edit your proposal and re-submit at any time before the deadline 24 November 2022 17:00:00 (Brussels Local Time).

You may download a digitally signed and time-stamped version of your submitted proposal.

You may withdraw your proposal at any time before call closure. When withdrawing, your proposal will not be considered in the evaluation stage.

[Update proposal](#)

[Download](#)

[Withdraw proposal](#)

Step-by-step Submission process

Proposal check-list

- Did you use the latest version of the call documents and submission templates?
- Did someone proofread your proposal text for clarity?
- Did you include all the templates required (checking with Section 5. of Call Document)?
- Are the annexes that require a signature signed in blue ink or a valid electronic signature?
- Do the budget totals in Part A and the Detailed Budget Table annex match?
- Do you have the same applicants (beneficiaries, affiliated entities, associated partners, subcontractors) in Part A and the Detailed Budget Table, in the same order and with an identical name?
- Did you answer all the questions in the application form, considering that this will be the basis on which your proposal is evaluated?
- Did all SME and Midcap participants fill in and submit the SME assessment, using latest available data?
- Did all Midcaps self-declare as Midcaps?
- Is the Declaration of ownership and control filled in for all non-public participants, and did everyone tick either “Control”, “No Control” or “No Change”?
- Did you include Actual indirect cost methodology declarations for each partner and affiliated entity opting for the actual indirect costs regime?
- If you are requesting less than 100% funding, did you explain the source(s) of co-financing (Member States contributions and/or private contributions) that will cover the rest of the budget, supported by a signed Cofinancing Declaration?
- Did you tick the relevant type of project and types of activities in the beginning of Part B template?
- Does the main coordinator contact for the proposal have a valid email indicated that he/she checks regularly?
- Did you send the password of the uploaded zip archive (and any other passwords used) to DEFIS-EDF-PROPOSALS-PWD@ec.europa.eu (with the proposal ID and the name of the zip archive)?**



Step-by-step Submission process

Finally

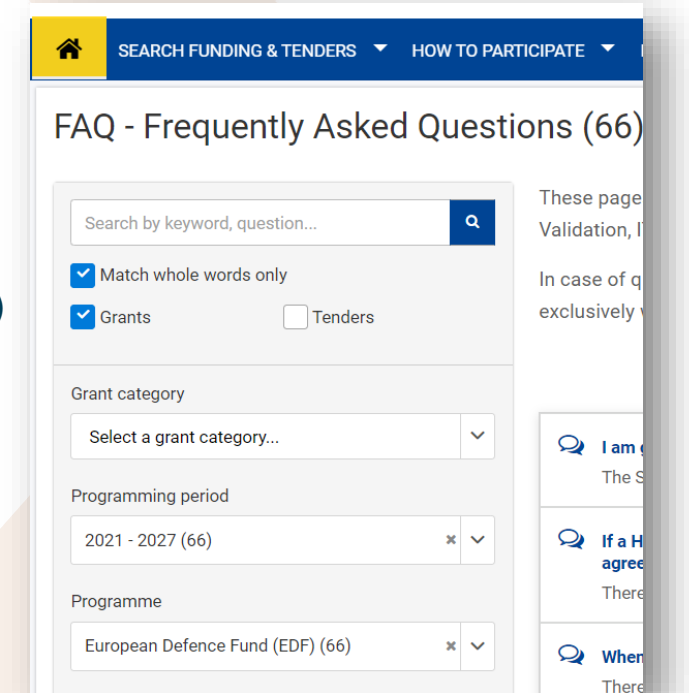
- Submission system raises some warnings where information provided may impact eligibility of application but not all eligibility conditions are checked by the system. It is the responsibility of the coordinator and partners to verify that the eligibility conditions set out in the call document are met
- Do not leave the submission to the last minute. You can always go back, edit, reopen and resubmit the proposal
- Do not feel obliged to reach the maximum page limit for Part B. Quantity does not necessarily means quality! But application files need to be complete!
- Some of Annexes/Supporting documents require approval/signature. Anticipate!



Step-by-step Submission process

Useful links

- [General information on the EDF on DG DEFIS website](#)
(including EDF annual work programmes and multiannual perspective, tutorials)
- [EDF Calls for proposals on the *Funding and Tenders portal*](#) (where to apply)
- [EDF Reference documents on the *Funding and Tenders portal*](#)
(Regulation, conditions to apply, submission templates, model grant agreements, etc.)
- [National Focal Points Network](#)
- Remaining questions regarding application to EDF calls for proposals?
→ DEFIS-EDF-PROPOSALS@ec.europa.eu
- [Infoday web page](#) (access to recording of the event)
- [Frequently Asked Questions on Funding and Tenders portal](#)

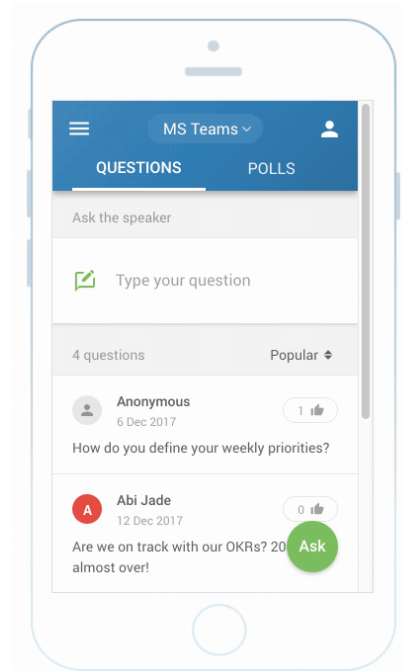


Q&A Time !

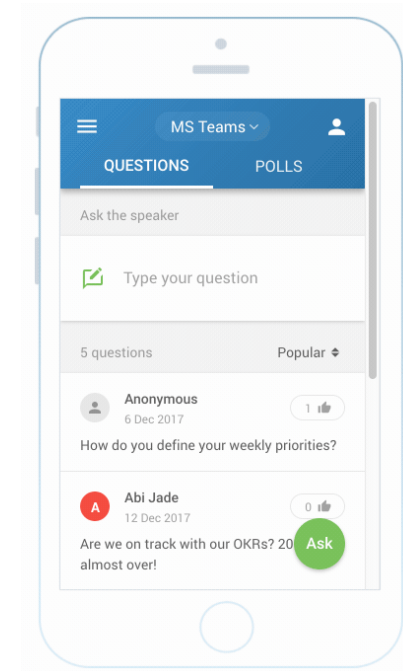


PASSCODE:
EDF-2024

- Scan the QR code
- Enter your name & event passcode
- Ask a question!



ASK A QUESTION



UPVOTE A QUESTION



EUROPEAN DEFENCE FUND

INFO | 20
DAYS | 24

Coffee break

Resume at 16.30
(Brussels time)

16.30-16.45 (15')

Overview of available tutorials

16.45-17.15 (30')

What comes after the evaluation, incl. Q&A

17.15-17.30 (15')

EDF supporting actions, incl. Q&A

17.30-17.45 (15')

Concluding remarks and wrap-up

OVERVIEW OF AVAILABLE TUTORIALS

Guillaume GALTIER

Policy Officer DEFIS A.2

EDF Implementation –

Programming and SME support

Available tutorials



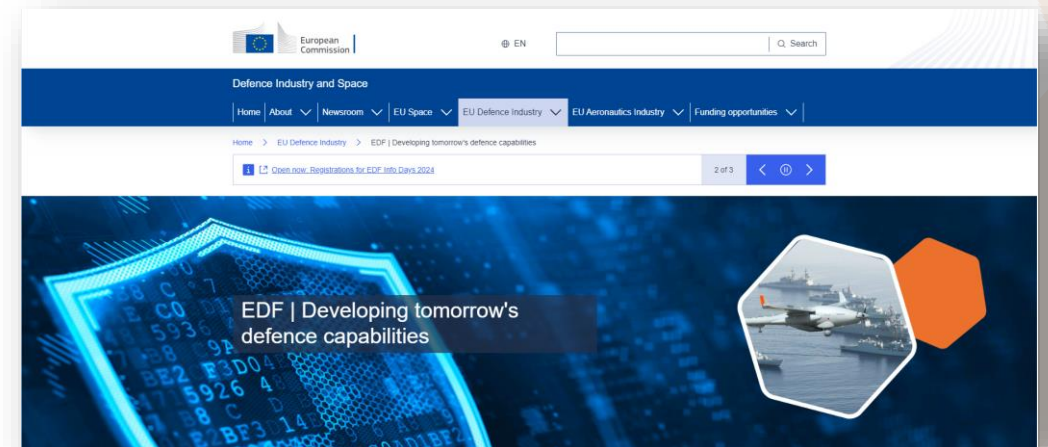
Financial aspects

- Cost categories and eligible costs
- Actual indirect costs methodology declaration
- Detailed budget tables

Other aspects

- PIC registration and validation
- SME and mid-cap assessment
- Ownership control assessment

- Tutorials available in the form of **videos + slides** (all accessible from the main EDF webpage)
- Chaptering system allowing direct navigation to sections of interest*
- Possibility to provide feedback*



WHAT COMES AFTER THE EVALUATION

- Grant agreement preparation
- Model Grant Agreements (MGA)
- Security framework
- Transfer authorisations

Grant agreement preparation

Joanna SZUMANSKA

Legal Officer DEFIS A.4

EDF Implementation – Defence systems

EDF 2024 Calls - Indicative timeline

20 June 2024

05 November 2024

May 2025

Sept//Oct. 2025

Nov./Dec. 2025

Opening of EDF 2024 on the Funding & Tender Portal

Final submission deadline for EDF 2024 calls

Information to applicants on evaluations results

Signature of Grants Agreements with awarded proposals/consortia

Projects Implementation

1- Grant Agreement Preparation

2- GA signature

3- Project management

4- End of the project

Establishment of the Security Framework

Model Grant Agreements (MGA)

Joanna SZUMANSKA

Legal Officer DEFIS A.4

EDF Implementation – Defence systems

Model Grant Agreement (MGA)

- Published in March 2024
- **Where:** Funding & Tender Portal
- **2** types of MGA available



MGA - Actual Costs

GRANT AGREEMENT



Data sheet

1. general data
2. Participant
3. Grant
4. Reporting, payment and recoveries
5. Non-compliance, law and disputes

1. General
2. Action
3. Grant
4. Grant Implementation
 - 4.1 Consortium
 - 4.2 Rules for carrying out the action
 - 4.3 Grant administration
5. Consequences of non-compliance
 - 5.1 Rejections and grant reduction
 - 5.2 Suspension and termination
 - 5.3 Other consequences
 - 5.4 Force majeure
6. Final provision

Annexes

1: Description of the Action (DoA)

2: Estimated Budget

2a: Information on unit costs and contributions

2e: Funding rates calculator (Development Actions)

3: Accession form

3a: Declaration on joint and several liability of affiliated entities

4: Model for financial statements

5: Specific provisions

EDF specific

EDF specific

Link with submitted proposal

Technical description (Part B)

Estimated budget (Part A)

Detailed budget table



- Confidentiality and security (Art.13)
- Ethics (Art.14)
- IPR (Art.16)
- Communication, dissemination and visibility (Art.17)
- Specific rules for carrying out the action (Art.18)

GRANT AGREEMENT



Annexes

Data sheet

1. general data
2. Participant
3. Grant
4. Reporting, payment and recoveries
5. Non-compliance, law and disputes

1. General
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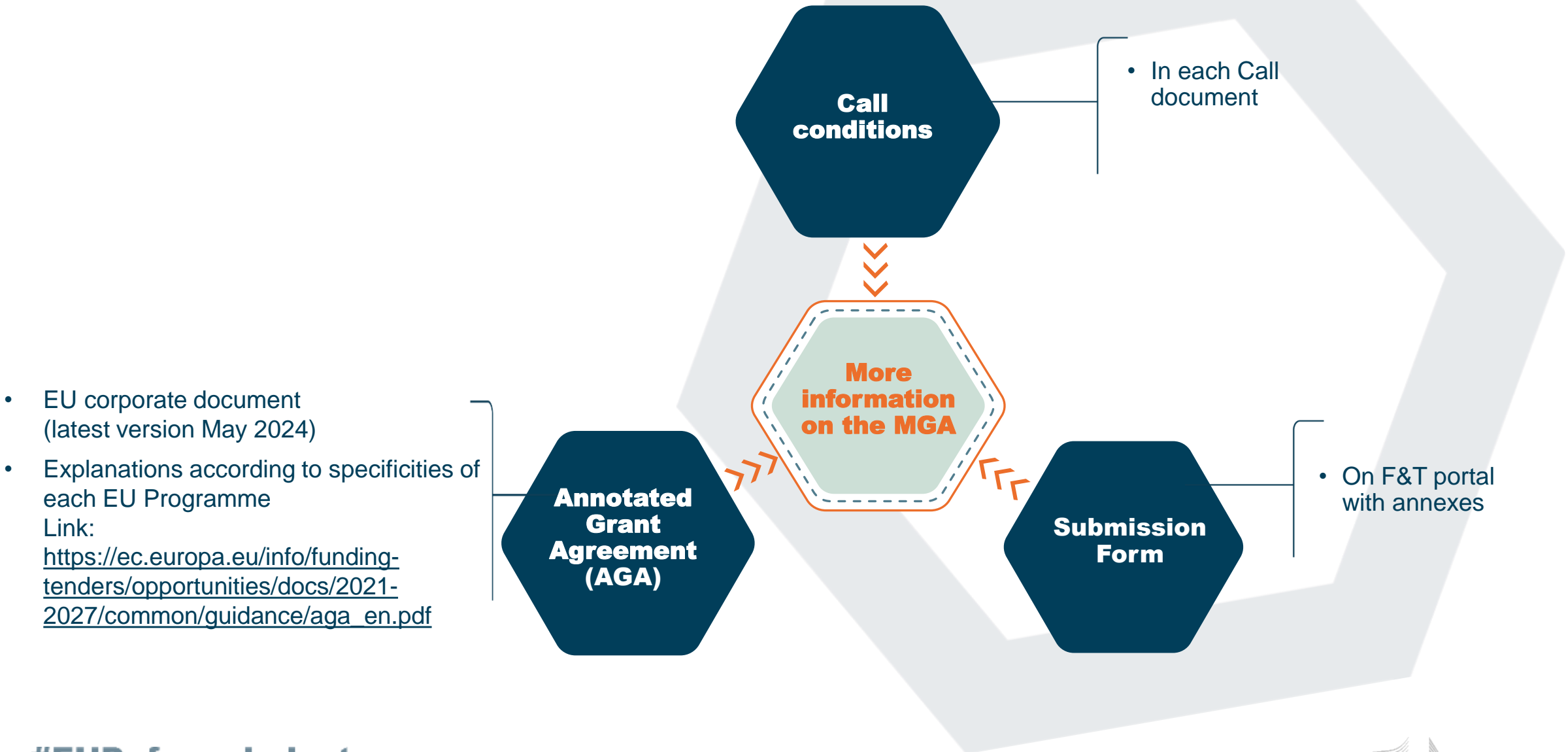
5: Specific provisions

EDF specific

Differences with AC MGA

- **Annex 2 displays grant per WP and beneficiary (no costs)**
- **No costs tables in data sheet**
- **Simplification LS vs AC:**
 - Art.5 (grant) and Art.6 (Eligible and ineligible contributions)
 - No obligation to keep records on AC incurred (Art.20)
 - Art.21 (Reporting): no financial reports
 - Art.22 (Payments and recoveries) based on completion of work
 - Art.24: (Certificates) not applicable

MGA – Information available



Security framework

Sandro CALARESU

Project & Security Officer DEFIS A.2
EDF Implementation – Programming and
SME support

Protection and Handling of Classified information related to the actions
(i.e. Programme Security Instructions, PSI and annexes)





Ref. Ares(2022)3899455 - 24/05/2022

GENERIC PROGRAMME SECURITY INSTRUCTION
CONCERNING *European*
Defence Fund
(SHORT TITLE: EDF PSI)

Version 2

16/05/2022



Model 1

when the Action is selected and follows the Model 1 type organisation, the Commission will complete the specific PSI for that Action based either on 'Model 1A' template (if the Action involves classified information up to and including CONFIDENTIEL UE/EU CONFIDENTIAL and/or SECRET UE/EU SECRET levels) or 'Model 1B' template (if the Action involves classified information of only RESTREINT UE / EU RESTRICTED level);

Model 2

when the Action is selected and follows the Model 2 type organisation, the Member States on whose territory the recipients are established, will complete the specific PSI for the Action, which will follow as much as possible the security requirements of either 'Model 2A' template or the 'Model 2B' template, and which will be communicated to the Commission for the inclusion in the grant agreement before signature.

In practice:

Model 1

The Commission, retaining the originatorship of the classified information generated during the implementation of the Grant Agreement, will:

- Conduct the security Scrutiny of the deliverables (experts from the concerned MS will be invited to contribute to this exercise);
- Complete the correct version of the PSI (Model 1a / 1b);
- Compile the Security Aspect Letter including in annex the PSI and the Security Scrutiny Report.

Model 2

The Member States on whose territory the recipients are established, retaining the originatorship of the classified information generated during the implementation of the Grant Agreement, will:

- Conduct the security Scrutiny of the deliverables ;
- Complete the correct version of the PSI (Model 2a / 2b)
- Send the documents to the Commission for the follow up.

The Commission, as the Granting authority, will:

- Compile the Security Aspect Letter including in annex the PSI and the Security Scrutiny Report provided by the concerned MSs.

Security Framework for EDF actions

Case of the EDF-2024-DA-EUCI call

European Defence Fund (EDF)

Call for proposals

EDF-2024-DA-EUCI

Call for EDF **development actions**,
requiring **proposals classified at SECRET UE/EU SECRET level**,
implemented via actual cost grants

[Call text extract]

6. Eligibility

-
-
-

- be in possession of a valid Facility Security Clearance (FSC) at the level of SECRET UE/EU SECRET and have Communication and Information Systems (CIS) properly accredited by the respective national Accreditation Authorities to handle documents at the same level.

The FSC and the CIS accreditation statements, signed by appropriate national authorities, must be submitted with the proposal support documentation.

Security Framework for EDF actions

Case of the EDF-2024-DA-EUCI call

Classification markings

(font 14 – Times New Roman, black/red bold, header & footer of each page of the document)

Proposal section	Classification markings (font 14 – Times New Roman, black bold, header & footer of each page of the document)
Cover sheet (if any)	SECRET UE/EU SECRET
Application Form Part A	SECRET UE/EU SECRET RESTREINT UE/EU RESTRICTED when detached from the rest of the proposal
Application Form Part B	SECRET UE/EU SECRET
Participant information	SECRET UE/EU SECRET
List of infrastructure, facilities, assets and resources	SECRET UE/EU SECRET
Detailed budget table	SECRET UE/EU SECRET RESTREINT UE/EU RESTRICTED when detached from the rest of the proposal
Cofinancing declarations	SECRET UE/EU SECRET or classification under national responsibility when declared by Member States or EDF associated countries
Actual indirect cost methodology declarations	SECRET UE/EU SECRET
Harmonised capability declarations	SECRET UE/EU SECRET
Declarations on procurement intent and common specifications	SECRET UE/EU SECRET
Ownership control declarations	SECRET UE/EU SECRET UNCLASSIFIED when detached from the rest of the proposal
Ethics issues table	SECRET UE/EU SECRET
PRS declaration	SECRET UE/EU SECRET

Proposal section	Classification markings (font 14 – Times New Roman, black bold, header & footer of each page of the document)
Certificate of Facility Security Clearance (FSC), including the statement of compliance of Communication and Information Systems (CIS) accreditation.	Classification under national responsibility and contributed as mandatory background information to the proposal

Security Framework for EDF actions

Case of the EDF-2024-DA-EUCI call

Templates pre-marked

SECRET UE/EU SECRET
RESTREINT UE/EU RESTRICTED
[when detached from the rest of the proposal]
(when the template is filled in)

Call: EDF-2024-DA-EUCI — Call for EDF development actions, requiring proposals classified at SECRET UE/EU SECRET level, implemented via actual cost grants

EU Grant: Application form — Part A (EDF): V1.0_EUCI — 23.04.2024

ADMINISTRATIVE FORMS (PART A)

EDF-2024-DA-EUCI
(Call for EDF development actions, requiring proposals classified at SECRET UE/EU SECRET level, implemented via actual cost grants)

Topic: EDF-2024-DA-EUCI-AIRDEF-CHGV
(Countering hypersonic glide vehicles)

Type of Action: EDF Development action

Proposal number: *not applicable*
Acronym: **xxxx**

Type of Model Grant Agreement: EDF Action Grant Budget-Based [EDF-AG]

3

SECRET UE/EU SECRET
RESTREINT UE/EU RESTRICTED
[when detached from the rest of the proposal]
(when the template is filled in)

Security Framework for EDF actions

Case of the EDF-2024-DA-EUCI call

Programme security instructions

- Dedicated Instructions for this call
- Applicable since preparation of the documents
- Built on the Model 1a of the generic EDF PSI
- Available together with the Call text and templates



Transfer authorisations

Gueorgui IANAKIEV

Team Leader – Defence Market DEFIS A.1
Defence industrial policy

Directive 2009/43/EC on intra-EU transfers of defence-related products ('Transfers Directive')

Establishes an authorisation system based on transfer licences granted to suppliers of defence-related products:

- ✓ **General Transfer Licences**
- ✓ **Global Transfer Licences**
- ✓ **Individual Transfer Licences**
- ✓ **Licence Exemptions**

Transfers under EDF projects

Recommendations

Determine if the item is subject to the Transfers Directive:

- ✓ Check the List of defence-related products (Annex to the Transfers Directive). In case of doubt, contact your national competent authority.

Identify applicable rules:

- ✓ Is the transfer subject to a licence exemption?
- ✓ Can the transfers benefit from a General Transfer Licence or a Global Transfer Licence ?

Consult your national competent authorities as early as possible:

- ✓ Tackle timely and effectively potential issues related to transfer authorisations.
- ✓ Early interaction with the national competent authorities to avoid blockages and delays affecting the projects

Coordination:

- ✓ Ensure that all participating entities are tackling timely and effectively transfer authorisation requirements
- ✓ Coordination of participating entities from the same Member State



https://ec.europa.eu/defence-industry-space/defence-transfers-directive-handbook-smes-0_en

EDF SUPPORTING ACTIONS

- Partner search
- Network of EDF National Focal Points
- European Network of Defence Related Regions
- Business coaching

Krastio PRES LAVSKY

Deputy Head of Unit DEFIS A.2
EDF Implementation – Programming and
SME support

How to search for partners?

Partner search tool on the EU Funding & Tenders portal

- Register and request/offer expertise to your topics of interest



EDF Info Days brokerage / matchmaking organised tomorrow + national EDF Info Days

- Platform open until end of year!

Network of EDF National Focal Points (NFP)

- Contact details of your national contact point(s) on the web site!

Other platforms

- Enterprise Europe Network
- European Defence Agency B2B platform
- European Network of Defence related Regions (ENDR)

EDF National Focal Points – a network for YOU

»»» Contact points to support YOU in each Member States and Norway

»»» Supported by national structures and under their responsibility/control

»»» Inspired by National Contact Points in Horizon Europe

»»» **Find your EDF National Focal Point**

https://ec.europa.eu/defence-industry-space/network-european-defence-fund-national-focal-points-nfp-0_en

Main tasks

- Provide practical information and assistance on all aspects of participation in EDF
- Organise awareness raising events
- Help with partner search
- Signpost to relevant national/EU sources

NFP Project

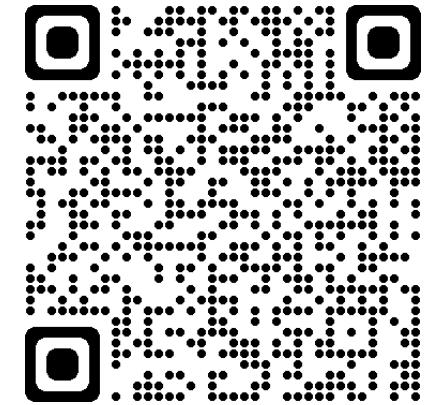
- The NFPs also cooperate cross-border with an EDF-funded grant, to strengthen their services and provide matchmaking
- The coordinator will update you on NFP practical support



EUROPEAN NETWORK OF
DEFENCE-RELATED REGIONS

INFO DAYS | 2024

- **Brings together regional organisations and clusters to exchange good practices in**
 - Integrating dual-use (defence-related) into their regional development strategies
 - Promote EU-funding opportunities + 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**



www.endr.eu

Currently 57 members → if interested, **join the network!**



What is it?

- Up to 15 days of **EU-funded business coaching for SME beneficiaries** of the EDF
- Provided by defence industry experts on a **one-to-one basis**, tailored to each company's needs



What is the aim?

- To help SMEs grow beyond their EDF project



Who is eligible?

- All SME beneficiaries of the EDF 2021, 2022, 2023 and 2024 calls



Who provides the coaching?

- A pool of **100+ defence/space industry experts**; proven track record in entrepreneurship, SME support and/or active roles in defence and space industry.



How to apply?

- 1) Register and 2) Complete their coaching services questionnaire via the **EUDIS coaching services platform**.



Apply now via the EUDIS coaching platform!

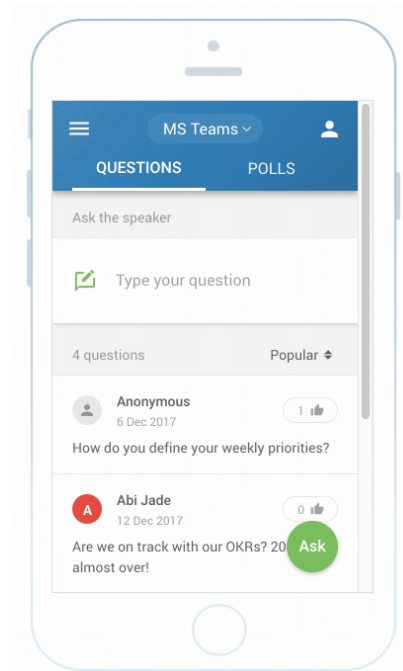
More information during the SME session on Wednesday, 29 June!

Q&A Time !

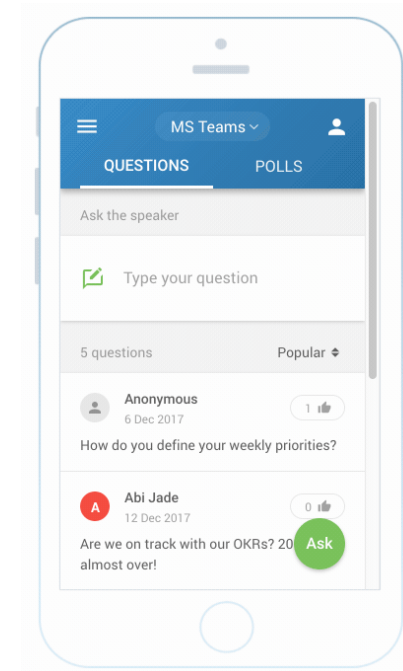


PASSCODE:
EDF-2024

- Scan the QR code
- Enter your name & event passcode
- Ask a question!



ASK A QUESTION



UPVOTE A QUESTION

CONCLUDING REMARKS AND WRAP-UP

Sylvia KAINZ-HUBER

Head of Unit DEFIS A.2
EDF Implementation – Programming and
SME support

Wrap-up

- Recording of this information day and slides available soon on [EDF webpage](#)
- Tutorials also available from the [EDF webpage](#)
- Relevant Slido questions will feed the [FAQs](#)
- Any remaining questions after the event can be sent to DEFIS-EDF-PROPOSALS@ec.europa.eu

Programme Day 2

Timeslot (Brussels time)	Copper Hall	Silver Hall	The Arc	Studio 201
08.30-09.00 (30')	On-site registration			
09.00-10.00 (60')	<i>Space, Air, Drones (1/2)</i>	<i>Cyber, Quantum, AI (1/2)</i>	<i>Components, Materials, Energy</i>	<i>Briefing to investors on EU defence priorities</i>
10.00-10.30 (30')	Coffee break			
10.30-11.30 (60')	<i>Drones (2/2), Ground (1/2)</i>	<i>Sensors, AI (2/2)</i>	<i>Environment, Medical</i>	<i>Pitching to investors (1/2)</i>
11.30-12.00 (30')	Coffee break			
12.00-13.00 (60')	<i>Ground (2/2), Naval, Underwater</i>	<i>Positioning, Navigation, Vision</i>	<i>System Engineering, Modelling and Simulation</i>	<i>Pitching to investors (2/2)</i>
13.00-14.00 (60')	Lunch break			
14.00-14.45 (45')	<i>EUDIS Business Accelerator & Matchmaking</i>	<i>EIB Group presentation</i>	<i>Technological challenge on Drone navigation</i>	
14.45-15.00 (15')	Coffee break	Coffee break	Coffee break	
15.00-15.45 (45')	<i>Opportunities for SMEs in the EDF</i>	<i>Pitch presentations from investors (1/2)</i>	<i>Technological challenge on Satellite imagery</i>	
15.45-16.00 (15')		Coffee break		
16.00-16.45 (45')		<i>Pitch presentations from investors (2/2)</i>		



**EUROPEAN
UNION**

**EUROPEAN
DEFENCE
FUND**

**MANY
THANKS
FOR YOUR
ATTENTION**