

Whose money, which regime, which team

Chapters 1 to 3. Ask the three questions in order before anything else about an opportunity. Practitioners answer them in seconds; the answer decides the documents, the timescale and the eligibility tests.

Organisation		Prepared by	
Opportunity / subject		Date	

Question	Grant (EDF, EDIP)	Loan to a state (SAFE)	Procurement contract
1. Whose money is it?	EU budget, co-funding an action the consortium proposes	EU borrowing, lent back to back to a Member State	A national agency or a NATO agency buying something
What you sign	Grant agreement and consortium agreement	Nothing: you see a national tender or joint procurement	A contract: specification, price, acceptance, penalties
What follows award	Audit, timesheets, indirect-cost method, reporting, cost recovery years later	The national contract's obligations, plus the 35% content rule passed down	Acceptance, warranty, liquidated damages, sustainment, flow-downs
Which team	Grants team	Bids and contracts team, national portal	Bids and contracts team

2. Which regime?	Sign in the notice	What to expect
Directive 2009/81/EC	Arms, munitions, war material, sensitive supplies, works and services	No open procedure; selection first; negotiated procedure with publication as standard; security of information and supply; possible subcontracting competition
Directive 2014/24/EU	Anything a ministry buys that is not sensitive	Open procedure by default; ESPD self-declaration; e-Certis; no clearance needed
Article 346 TFEU	No notice at all	Government-to-government, national champion or direct award: reach it through the industrial base, not a portal

Threshold 2026-2027	EUR	Your contract	Above?
2009/81/EC supplies and services	432,000		
2009/81/EC works	5,404,000		
2014/24/EU central government supplies and services	140,000		
2014/24/EU sub-central supplies and services	216,000		
2014/24/EU social and other specific services	750,000		
2014/24/EU works	5,404,000		

3. Therefore: the documents we will produce, the timescale we will work to, the eligibility tests we must pass, and the team that owns the response.

The gap between 140,000 and 432,000 is where much of the real work lives: studies, tests, tooling, training and spares, often advertised only nationally. Figures are those the book prints for 2026-2027; they are revised every two years.

One page per target country

Chapter 4. Four questions for each country you can realistically serve. If you cannot answer the fourth, you are not ready to spend money on that market.

Organisation		Prepared by	
Opportunity / subject		Date	

Country	1. Agency and its role	2. Publication channels, national ones included	3. Security qualification and who issues it	4. What it will never compete
France	DGA: procurement, technical authority and industrial policy in one	achats.defense.gouv.fr and PLACE		
Germany	BAAINBw, Koblenz; BwBBG in force to 31 Dec 2035	National portal, European feed		
Poland	Agencja Uzbrojenia, with offset supervision	e-Zamówienia, ministry and agency sites	Industrial Security Certificate for classified contracts	
Sweden	FMV; LUFS alongside the general act	kommersannons.se/fmv		Underwater, fighter aircraft, C2 and crypto, ammunition supply, sensors
Norway	Forsvarsmateriell; the one EDF associated country	National portal		
Denmark	DALO, which also administers EDF co-financing	National portal		
Italy	SEGREDIFESA and DNA	National portal		

Item	Status	Owner / date / evidence
Before spending money on the market		
Legal basis read in a real notice: which regime, which article (in France, the Code de la commande publique numbering)		
Offset regime: statutory (Poland), none (Sweden): priced accordingly, never assumed		
Contract levers: advance payments, bonus-malus (Germany), security-of-supply clauses on raw materials		
National monitoring set up: account, the buyer's own classification codes, weekly reading		
Security qualification started when the market is chosen, not when a notice appears		

The NATO route, in sequence

Chapter 5 and Appendix B. Visibility is earned by registration, not by monitoring. The Declaration of Eligibility is issued by your government, on its timetable, for one project.

Organisation		Prepared by	
Opportunity / subject		Date	

Step	Issued by / where	Started	Done	Reference / note
1. NCAGE code (five characters): prerequisite for both agencies	National codification bureau			
2. NSPA Source File registration (free; NSPO member country)	NSPA			
3. EBID access for low-value electronic bidding	NSPA			
4. Monitor the NCI Agency procurement bulletin board	NCI Agency			
5. Neo eProcurement registration	NCI Agency			
6. Basic Ordering Agreement or Not-for-Profit Framework	NCI Agency: the real gate			
7. Declaration of Eligibility for the specific project	Your national government authority			
8. Bid; expect to bid more than once				

Pre-announced opportunity (NSPA FBO above EUR 80,000, or bulletin board)	Agency	Pre-announcement	RFP expected	Bid due	DoE requested

Trigger rule: the pre-announcement, not the solicitation, starts the Declaration of Eligibility conversation with the national authority, in parallel with drafting. Registered entity name identical in Source File, Neo, the bid and the DoE: yes / no

A first award is more likely a small EBID purchase, a work package under a framework holder, or a small services line under a BOA. Price honestly, keep the scope small, let reliability be what the buyer remembers. Case three in the archive puts days on this sequence.

Clearance plan

Chapter 6. The chain runs one way: no facility clearance, no personnel clearance, no access to the classified annex, no compliant bid. Every link takes months and the links are serial.

Organisation		Prepared by	
Opportunity / subject		Date	

Company: Facility Security Clearance	Answer	Date / evidence
Issuing authority (NSA or DSA)		
Variant held or applied for: without storage / with storage / storage plus accredited CIS		
Variant the target work requires		
Facility security officer named in writing, with time and authority		
Controlled area, registry, inspection: status		
Accreditation of classified systems (separate from the building and the people)		

Person	Nationality / nationalities	PSC level held or needed	Sponsored on	Expected	Interim unclassified work

Item	Status	Owner / date / evidence
Three questions at offer stage, not after signature		
Does the employer hold a facility clearance at the level the role requires?		
At what point will sponsorship be submitted?		
What work will I do in the interval?		
Before a classified meeting or distribution		
Visit request sent between security offices (weeks, not days)		
Recipient cleared, at the level, with a need-to-know for this document		
Transmission route approved by the security officer		

Clearances are issued free of charge by the state; nobody can sell you a faster one. A clearance is granted for a job, not owned by a person, and it does not cross a border by itself.

The 35 per cent content review

Chapter 7. Measured on the component cost of the end product. Explode the bill of materials to the level where foreign origin actually sits; a European-built assembly with foreign silicon is not European for the value of that silicon.

Organisation		Prepared by	
Opportunity / subject		Date	

Line / item	Supplier	Booked origin	Cost (EUR)	Embedded foreign (EUR)	Exploded foreign (EUR)	Declaration dated

Result	First pass (booked)	After drill-down	After remedy
Non-European component cost			
Total component cost			
Non-European share			
Against 35%: pass / fail, headroom in points and in euros			

Perimeter	Counts as European
EDIP	EU and associated countries (Norway)
SAFE	EU, EEA-EFTA states and Ukraine; participation (Albania, Canada, Japan, Moldova, Norway, South Korea, UK) is a separate question

Chapter 7's example: 27.0 per cent on the first pass, 35.25 after the drill-down (fails by a quarter of a point), 33.0 after requalifying the data converters. The two points left absorb 9.3 per cent of foreign cost inflation over the programme, 2.25 a year: give engineering a foreign-content budget in euros and put the rest in the risk register.

Design authority and the evidence file

Chapter 7. The second test fails independently of the percentage: a system at 20 per cent that cannot be recompiled without a foreign licence fails Category 2 on its own terms.

Organisation		Prepared by	
Opportunity / subject		Date	

Critical item	Origin of the constraint (ITAR, EAR, national)	Can we modify?	Can we repair?	Can we reproduce?	Programme risk

Item	Status	Owner / date / evidence
The evidence file		
Bill of materials exploded to the level where foreign origin appears, with unit costs		
Supplier declarations of origin and export-control classification, per line, dated and refreshed		
Flow-down clauses: suppliers must notify a change of source, manufacturing location or classification		
A maintained record of how the figures were derived, kept for audit years after award		
The calculation re-run after every design or sourcing change		
The export-control programme it sits in		
Classification of every product and technology as data on the part, owned by engineering		
Annual Annex I update tracked (most recently Delegated Regulation (EU) 2025/2003)		
Article 4 and 5 catch-all screening in order acceptance; brokering, technical assistance and transit controlled		
Authorisation type chosen per flow; validity diarised (two years; four for large projects)		
Empowered official appointed in writing; training; record keeping; internal audit		

The tender arc and the compliance matrix

Chapter 8. Influence is highest before the notice and falls at every step. Each stage scores something other than its heading.

Organisation		Prepared by	
Opportunity / subject		Date	

Stage	What the buyer is actually scoring	Our action / date
Capability planning (CDP, CARD, PESCO)	Nothing yet: direction	
Market consultation, RFI, industry day	Nothing formally; learning everything	
Contract notice	Its own choices become binding: procedure, security regime, subcontracting	
Selection	Credibility of the organisation: standing, capability, security of information and of supply	
Invitation to negotiate and rounds	Consistency across technical, commercial and programme answers	
Best and final offer	The whole package against published weights; no residual qualifications	
Award, standstill, debrief	The published arithmetic; mandatory items pass or fail	
Remedies	Rarely worth it; the quality of your standstill questions	

Req. ref	Requirement (mandatory?)	Answered in (volume, section)	Evidence	Owner	Status

The three jobs a newcomer can own on day one: the compliance matrix, document control through the negotiation rounds (what changed, when, at whose request, what it obliges us to do), and submission mechanics with a buffer in days.

The EDF or EDIP call on one page

Chapter 9. Extract every weight and threshold before a word of narrative is written; work backwards from the deadline.

Organisation		Prepared by	
Opportunity / subject		Date	

Call parameter	Value
Instrument and topic; action type (research / development; EDIP window)	
Budget of the topic; maximum per project; grant model (lump sum?)	
Funding rate: research up to 100%; prototyping max 20%; testing, qualification, certification max 80%	
Bonuses that genuinely apply: cross-border SME +10 pts; same-country SMEs +5; mid-caps (15% of costs) +5; PESCO	
EDIP ceiling: common procurement 15% (25%); industrial reinforcement 35% (50%); EDPCI up to 100%	
Consortium rule: 3 entities in 3 countries (or 2 in 2 where the topic allows)	
Page limit of Part B (pages beyond it are disregarded)	

Award criterion	Weight	Maximum	Individual threshold	Our weakest section
Excellence				
Impact				
Quality and efficiency of implementation				
Overall pass mark				

Working back from the deadline	Duration	Date
Submission buffer nobody may spend	48 hours	
Drafting	8 to 12 weeks	
Consortium agreement negotiation, with a lawyer	4 weeks	
Partner search and national dialogue (Member State commitment, co-financing)	3 to 6 months	
Positioning: Info Days, brokerage, National Focal Point	6 to 12 months before publication	

On the EDF 2026 deadline of 29 September 2026, the backward sum puts drafting from 19 July, the consortium agreement from 21 June, and partner search between late December and late March. The co-financing gap is a board decision: see the proposal workbook.

Offsets and industrial participation

Chapter 10. An offset is settled in credit, not cash. Establish the regime before building a package; over-promising gives away margin that was never required.

Organisation		Prepared by	
Opportunity / subject		Date	

Item	Status	Owner / date / evidence
Three things from the tender documents and the national regime		
Does a statutory offset obligation exist at all? (Poland: yes, supervised by the Armament Agency; Sweden: no offset strategy)		
Will the buyer use the competitive subcontracting provisions of Directive 2009/81/EC?		
Is any part financed through an EU instrument with content-origin conditions?		

Obligation	Value
Contract value; obligation as a percentage; credit required	
Discharge period; schedule; liquidated damages on the undischarged balance	
Effect of a shortfall on eligibility in later competitions	

Activity	Direct / indirect	Commercial value	Multiplier	Causality: share at risk	Credit	Cost to us	Approved?

Total credit against the obligation; shortfall and its penalty; the cheapest causal way to close it; the package cost as a share of the price and of the margin. Case one in the archive works a radar package through all four.

Company bid readiness

Appendix C, checklist 1. Standing infrastructure, reviewed annually, not bid work. Mark each line done, in progress with an owner and a date, or deliberately not applicable.

Organisation		Prepared by	
Opportunity / subject		Date	

Item	Status	Owner / date / evidence
Registrations and codes		
NCAGE code from the national codification bureau		
EU Participant Identification Code; TED and eForms alerts on your CPV codes and countries		
NSPA Source File and EBID; NCIA Neo; a BOA or Not-for-Profit Framework agreement		
Security		
Facility Security Clearance held or applied for, in the right variant		
Facility security officer named in writing, with time and authority		
Enough people with Personnel Security Clearances at the level of the annexes you will bid against		
Certification and control		
ISO 9001, EN 9100, ISO 27001 or a NIS2-aligned equivalent, current		
Ownership and control mapped: shareholders, beneficial owners, board, any non-associated third-country link, affiliates included		
Export-control function: empowered official appointed, every product classified		
Evidence a buyer will ask for		
Economic and financial standing: audited accounts, turnover, insurance, bank references in questionnaire format		
Security of supply: stock policy, second sources, surge capacity, critical raw-material dependencies		
Past-performance library: reference sheets, anonymised cases, current CVs of the people you will name		
Discipline		
A written bid/no-bid rule, and one named person entitled to say no		

Proposal and export-control readiness

Appendix C, checklists 2 and 3. Run the proposal list twice: six to twelve months ahead, and in the final fortnight.

Organisation		Prepared by	
Opportunity / subject		Date	

Item	Status	Owner / date / evidence
Proposal (checklist 2)		
Topic read in full; capability genuinely fits		
Consortium rule met; your role agreed in writing; core capability inside beneficiaries		
Ownership-control declarations collected from every beneficiary, affiliate and subcontractor, and checked		
Executive management in the EU or an associated country; guarantee where needed		
Development action: Member State commitment secured; co-financing gap funded		
Bonus arithmetic verified against the real consortium		
Part A and Part B reconciled; page limit respected; weights and thresholds as the skeleton		
Background IP declared; foreground access settled; publication controlled		
Eight to twelve weeks of drafting; 48 hours of buffer; finance briefed on audit and timesheets		
Export control and content (checklist 3)		
Every item classified (Annex I or national military list), recorded and dated		
Catch-alls (Articles 4 and 5) screened; brokering, technical assistance and transit controlled		
Authorisation type per flow; validity diarised		
Military-listed items assessed under Common Position 2008/944/CFSP		
US-origin content mapped: ITAR, EAR, re-export, third-country-national access		
Origin evidenced to the depth the customer will audit; 35% computed on component cost		
Category 2 design authority answered as a design question; visits aligned with nationality rules		

Personal readiness and the six-month plan

Appendix C, checklist 4, and Chapter 13. Eligibility is decided before merit, and evidence beats vocabulary.

Organisation		Prepared by	
Opportunity / subject		Date	

Month	Output	Date	Done
1. Two job families, one country; portals registered; alerts set			
2. Administrative literacy: NCAGE, PIC, NSPA and NCIA routes, the clearance sequence, in your own notes			
3. First artefact: two pages on a live call or tender, critiqued by someone in the sector			
4. An Info Day, brokerage event or cluster meeting, in person: five names and one follow-up			
5. Ten targeted applications backed by artefacts; consortium members and framework winners first			
6. Convert: case exercises rehearsed; the clearance conversation a factual thirty seconds			

Item	Status	Owner / date / evidence
Checklist 4		
Nationality and clearance position stated plainly, including dual or third-country nationality		
CV in defence vocabulary without claimed programme exposure		
A target family and a shortlist of named employers across primes, tier-1, SMEs, agencies, consultancies		
One call document and one contract notice read end to end, annexes included		
Credential plan with dates; mobility constraints stated honestly; networking routine		
Salary expectations grounded in what is published (the UK 2025 survey is cross-sector)		
Personal red lines written down now, while nothing is at stake		

The first ninety days

Chapter 14. Map, own, contribute, in that order. Document an inherited problem on the day you find it.

Organisation		Prepared by	
Opportunity / subject		Date	

Window	Output	Evidence / date
Week 1	Master schedule, risk register, contract or grant agreement read in full, deliverables due in 90 days	
Week 2	Classification list, facility clearance variant, export-control classification of each subsystem	
Week 3	Stakeholder map with names, outside the employer too; meet the security officer and the export-control officer	
Week 4	Your own two-page summary of the programme, corrected by your manager	
Days 31-60	One deliverable end to end; the delegation-of-authority threshold checked before drafting	
Days 61-90	Visible on something evaluated; the obligations register written; first-year objectives that are evidenced	

Before anything leaves the building	Yes / no
What is its classification, and is the recipient cleared and authorised to receive it?	
Does it contain controlled technology, and does an authorisation cover this transfer?	
Does it commit the company, and who is authorised to commit it?	

Looks wrong in month one	Explained by day sixty?	Still open: my first contribution