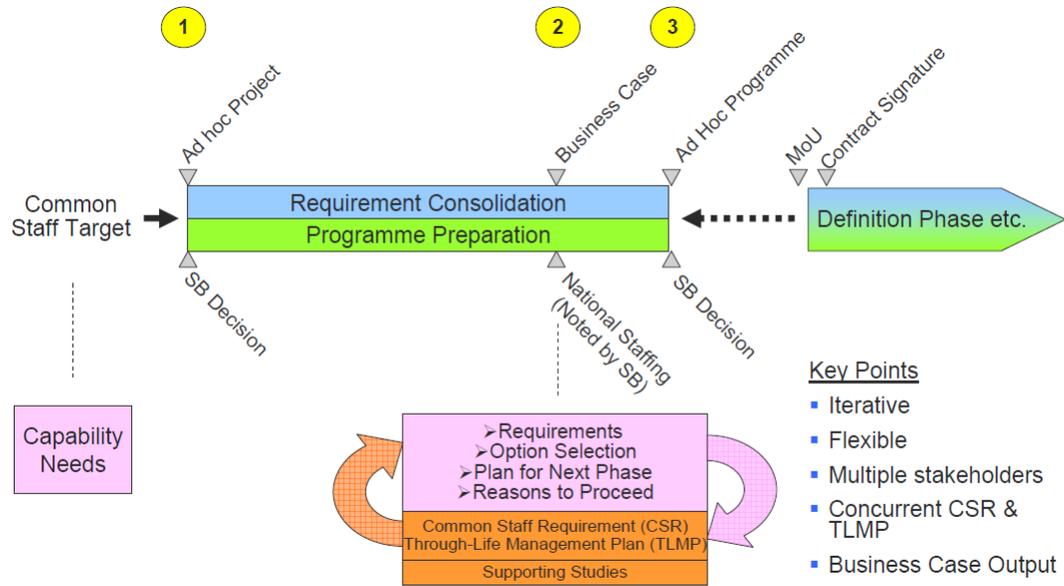


GUIDE TO THE CONDUCT OF A PROGRAMME PREPARATION PHASE (REVIEW 2012)



INTRODUCTION

This guide to the conduct of a Programme Preparation Phase is a key tool in translating the many facets of the European Armaments Co-operation Strategy as approved by the EDA Steering Board in October 2008 into tangible action. The Guide was developed on the basis of a number of workshops with participating Member States experts and from taking account of the lessons learned in its application in EDA Ad hoc Projects. Its contents are considered to be a useful contribution to preparing cooperative programmes in the EDA framework. It is intended to keep this Guide and its Annexes as a “living document.”

Armaments@eda.europa.eu would be delighted to receive any comments or recommendations to improve this Guide.

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EDA GUIDE TO THE CONDUCT OF A PROGRAMME PREPARATION PHASE

Purpose of the Preparation Phase

1. The purpose of capability development in the EDA framework is to translate military requirements which derive from the capability needs of the Common Security and Defence Policy (CSDP) into feasible solutions that can be taken forward. The Preparation Phase is the initial phase of a co-operative armament programme or an activity to sustain an existing capability. It corresponds to the input of stakeholders working together on requirement consolidation and project management, with the aim to connect a harmonised capability requirement with the armaments and industrial arrangements necessary to deliver the resulting co-operative programme.

2. During the Preparation Phase within the EDA, a prospective programme is prepared in terms of an outline scope, time, cost, acquisition organisation and participation. A through-life approach is taken by considering the impact of the subsequent phases (definition, development, production, in service and disposal) and addressing the identified programme risks and opportunities as early as possible.

3. This Guide is designed to assist pMS in the generation of a set of documents to:

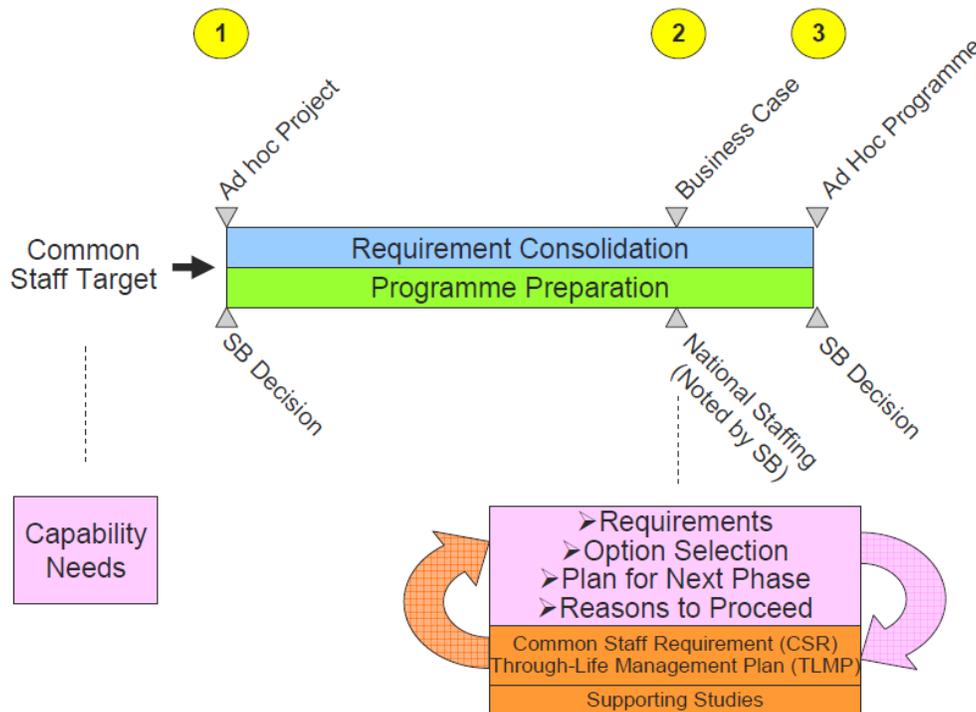
- support the decision making process;
- secure 'political' buy-in to the co-operative programme and;
- ensure the seamless progression to the next phase of acquisition.

The described process is devised for determining the most appropriate equipment-based solution(s) to a common capability need, although it may also have a broader utility in activities not specifically related to armaments and other

capability lines of development.

4. The main input consists of the Common Staff Target (CST) and the main output is a concise Business Case, designed to cover those issues critical to the programme decision to launch a programme, supported by one or more Common Staff Requirement(s) (CSR) and a Through-Life Management Plan (TLMP).

5. Two Steering Board decisions are normally required, one to initiate an EDA Ad hoc Project at the beginning of the Preparation Phase and another at the end to launch an EDA Ad hoc Programme. If the programme is to be managed by an executive agency such as OCCAR, a second Steering Board decision may not be necessary. These outputs and decision points are indicated in the simplified schematic below and explained in the subsequent paragraphs.



6. Although the process appears sequential it is in fact iterative and allows for cooperative programmes to start at any point of the process. It also supports all

sizes of programme and is flexible in its application.

7. Before deciding to conduct a Preparation Phase, interested pMS are advised to consult the [EDA Concise Guide to Co-operative Programmes](#) available on the EDA website. This document highlights the most important aspects that governments should take into account in preparing and managing a co-operative programme.

Steering Board Decision to Begin a Preparation Phase

8. The Preparation Phase begins with a Steering Board decision using the EDA [Outline Decision](#) template and comprising:

- A group of contributing Members (cM)¹ declaring their intention to carry out a Preparation Phase and produce a Business Case (including the CSR(s) and TLMP), as described in an EDA Outline Description;
- Offering the opportunity for other pMS to opt-in the Preparation Phase, under the conditions defined by the cM;
- Authorising the EDA to expend effort during the Preparation Phase;
- Outlining the proposed risk reduction and supporting studies and how these will be funded (normally by the cM); and
- Creating an EDA Preparation Group (PG), comprising cM, the EDA and other stakeholder representatives as necessary, for the duration of the Preparation Phase.

9. The Preparation Phase is considered to be an EDA Ad hoc Project in accordance with the [Council Decision 2011/411/CFSP of 12 July 2011 defining the statute, seat and operational rules of the European Defence Agency and repealing Joint Action 2004/551/CFSP](#). In the majority of cases a Category B Project is established, which can be with or without financial commitment. A

¹ The contributing Members (cM) are those participating Member States and third parties who decide to contribute to the specific Preparation Phase.

Category A project could be considered in special circumstances. The cM must be clear on the scope, funding and management of the programme Preparation Phase to ensure the information required for the Business Case (including the CSR(s) and the TLMP, see below) can be produced. If contracting activities are required (e.g. studies to support the development of the CSR or the TLMP) or if national information is to be exchanged during the Preparation Phase, appropriate arrangements will need to be established.

10. It is also expected at this stage that the cM will have included the programme in their national plans.

Common Staff Requirement & Through-Life Management Plan

11. Developing the CSR and the TLMP concurrently will be critical to success of the Preparation Phase. These documents translate the CST into military requirements across all Capability Areas, including the effect on all Lines of Development, measures of effectiveness, as well as numbers, costs, key programme dates and the acquisition strategy. Technology push and dual use issues will be taken into account, the overall risks to the programme assessed and mitigating actions taken or planned. An outline CSR is at Annex A and a framework for a TLMP is at Annex B.

12. The CSR expresses the requirements with solutions in mind, and therefore technological, economic and industrial issues must also be considered, especially for the larger cooperative programmes where the stakeholder interaction and influence is complex. This process of generating the CSR is iterative and its content will reflect inputs from the cM and other stakeholders participating in its production. During this process users' requirements should be harmonised and the consequences of unique requirements should be addressed.

13. The concurrent development of the CSR and TLMP will assist the

contributing Members in identifying the most promising solutions through trade-offs between effectiveness, availability, integration, cost and industrial readiness issues. And R&T can be targeted to reduce technological risk through support studies, in most cases funded by the cM. Key issues such as national or international regulations (e.g. ordnance safety and environmental legislation) must be taken into account as early as possible.

14. It is possible that there could be more than one CSR and TLMP supporting a CST. In principle the CST is not affected by the CSR. Any gap between the CST and CSR should be well understood and result in a constructive feedback to the EDA capability development process. Specifically the relevant Strategic Context Case should be revised and the impact on the CDP addressed.

15. Capability, Armament and R&T experts from the cM will derive the CSR and TLMP. Typical tasks to be carried out during the Preparation Phase are at Annex C. The development of the CSR would normally be facilitated by a Capabilities Project Officer from the EDA or from a cM, and the development of the TLMP would normally be facilitated by an Armaments Project Officer from the EDA or from a cM. The bulk of work would normally be done by the cM and their subject matter experts. Support would be provided from all the EDA Directorates, as appropriate. The time needed to reach an agreement on the CSR and TLMP will depend on the many factors outlined above and the number of cM.

Industry Engagement

16. It is important to consult industry as early as practicable during the Preparation Phase. This serves two main purposes. Firstly, to keep industry informed of emerging requirements to aid their own planning and industrial networking. The cM would normally provide Industry with elements of the CST in a fair and transparent manner so as not to compromise future competition. This would be done through the National Defence Associations. Secondly, invite

Industry to provide information to complement or validate government derived programme information. The cM would normally request specific information from industry through a Request for Information through the National Defence Associations, with the aim to:

- identify what will be available on the market or be developed to meet the CST/CSR;
- identify how industry might co-operate across borders;
- de-risk the whole programme (throughout its life and throughout the supply chain) and;
- provide assurances that the next phase can be launched with sufficient confidence in the overall programme cost, performance and timescales.

This information will be considered by the cM while developing the CSR, the TLMP, and in preparing the Business Case.

Business Case Development

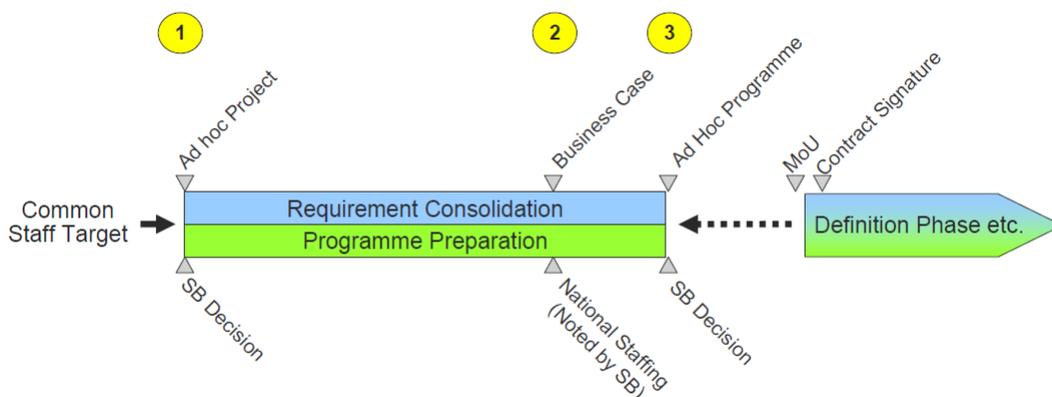
17. The overall aim of the Business Case is to provide sufficiently compelling reasons for the cM to take decisions, initiate further activities and commence negotiations for the following phases, prior to any formal commitment. It is the key decision document resulting from the Preparation Phase and covers the significant items that will affect a decision to proceed with a co-operative programme. It draws on the supporting information contained in the CSR and TLMP but should not cover routine programme issues. It should be concise and address the operational capability gap, the preferred option(s) to fill the gap over the required time period, what certainties and risks remain and how the capability is to be procured/supported/accepted. The Business Case Framework at Annex E provides a 'check list' of proposed items to be addressed.

18. The Business Case is developed by the cM and facilitated by the EDA

Armaments Directorate with assistance from other EDA Directorates.

19. The CSR, TLMP and Business Case should be developed in parallel and in an iterative manner in order to ensure they remain complementary and optimal documents. For example the results of the options analysis or cost share arrangement could require the contents of the CSR to be reviewed to better align with the preferred option or budgetary constraints. Likewise the TLMP must transpose the capability requirement into the armaments domain and provide an achievable baseline for a prospective programme. The Business Case brings these two strands together into a document that provides a clear set of recommendations for the decision maker. The CSR and TLMP provide the supporting evidence and may be annexed to the Business Case for coherence.

20. Expert input from the likely acquisition organisation will be requested by the cMS and is considered a necessity to ensure the smooth progression of an armaments programme into the next phase. The aim should be to reduce the gap between the end of the Preparation Phase and the start of the next phase (e.g. Definition), as depicted below.



21. The detailed technical specifications, contract arrangements and MoU may fall outside the remit of the EDA and be developed by the cM in conjunction with

the chosen acquisition organisation. Nonetheless, given the desire to maintain programme momentum and move efficiently to the next phase, critical aspects of the MoU and contract should be addressed during the Preparation Phase, and even draft documents could be produced.

Steering Board Decision to End a Preparation Phase

22. The Preparation Phase ends with a Steering Board decision based on the outcome of the Preparation Phase and would comprise:

- The Steering Board noting the approval by the cM of the Business Case (supported by the CSR and TLMP);
- The Steering Board noting the results of the Preparation Phase by means of an appropriate summary of the Business Case;
- The cM declaring their intention to launch an EDA Ad Hoc Programme;
- The opportunity for other pMS to opt-in the EDA Ad Hoc Programme under the conditions defined by the cM;
- Authorising the EDA to expend effort during the EDA Ad Hoc Programme (in some cases through the addition of resources) to assist in the effective progression of the programme, and tasking the EDA to report back to the Steering Board as appropriate.

23. The Ad hoc Programme would be initiated in accordance with the [Council Decision 2011/411/CFSP of 12 July 2011](#) using the EDA [Outline Description](#) template. Following the EDA Steering Board decision, an EDA Ad hoc Programme Group (AHPG) will be established and is tasked with defining and setting up the practical arrangements for the next phase(s) in conjunction with the chosen acquisition organisation.

24. A Steering Board decision at the end of the Preparation Phase may not be necessary if an executive agency such as [OCCAR](#) is chosen to manage the

programme, nevertheless the summary of the Business Case will still be made available to all pMS. The integration of the programme will be through the rules and procedures of the executive agency itself. Should the EDA have a specific role throughout the life-cycle of a programme then this will be decided by the cM and approved by the Steering Board. EDA's role in support of the cM could be for example to encourage future pMS opt-in, check consistency with emerging capability requirements, development of the EDTIB, undertake supporting studies, prepare technology insertions or in-service support arrangements, and enhance interoperability.

(To be replaced by a Template)

Common Staff Requirement

Principles

- Industry involvement
- CAP x ARM (+R&T) contribution
- Identification of possible solutions
Technical x Industrial x Economic
- Technology push and Dual aspect considerations
- Iterative process
- Detailed roadmap

Process

- Decision at cMS level
- Steering Board visibility

Definition

- The translation of the CST into users’ requirements considering technological, economic and industrial issues across all Capability Areas and along all Lines of Development

Responsibilities

- EDA Capabilities Directorate

Experts

- Capability (EDA & cMS)
- Armament (EDA & cMS)
- R&T (EDA & cMS)
- Executive Agency advice
- Industry advice

Framework for a Through-Life Management Plan

Section	Subject	Possible Content
Section 1	Mission & Objectives	Objectives of the TLMP Overview of the Programme Military Context Capability Gap Key Requirements from the CST and CSR Customers Programme Boundaries Programme Background Programme Status Assumptions Constraints and Drivers Current Approvals Programme Objectives
Section 2	Stakeholders	On Overview of the Programme Organisation A Preparation Group Context Diagram/ Stakeholder Map Key Stakeholder Interfaces – agreements and control Stakeholder responsibility Matrix TLMP responsibility Matrix Lines of Development Responsibility Matrix
Section 3	Strategies	A summary of the PG’s Programme Management Strategy, explaining how it will manage the programme on a through-life basis; The key strategic areas of the next phase of the programme: <ul style="list-style-type: none"> • Procurement • Capability management • Technology management • Risks, impacts and mitigating strategies • Milestones and approvals • Safety • Environment • Evidence to substantiate the preferred option(s) (technical and operational, testing, tested operational scenarios, battle lab and CD&E etc.) • Technology, Interface and System Readiness Levels (TRL, IRL and SRL), planned and

		<p>achieved.</p> <ul style="list-style-type: none"> • Transition from phase to phase • Interfaces with other systems • Government Furnished Equipments and other contributions (e.g. test facilities..) • In-Service Support • Disposal
Section 4	Plans & Processes	<p>Detailed Plans & Processes for the next phase Programme Schedule and Programme Breakdown Structures; Overview/draft plan for all subsequent programme phases; Responsibilities for delivering the Outputs and for Funding and Resourcing the Work; Processes for delivering the Outputs.</p>
Section 5	Resources	<p>The Resources to deliver the Programme; The Whole Life Cost (WLC) Plan, encompassing cost forecasting strategy and WLC management strategy; Overview, and links to the :</p> <ul style="list-style-type: none"> • The WLC model • WLC and Investment Appraisal analysis for each option • Analysis of escalating factors • Financial Plan for the next phase and outline plan for subsequent phases. • Resource Breakdown Structure • Programme Resource Plan (personnel and skills) for the next phase and estimates for the subsequent phases of the programme
Section 6	Evaluation of Success	<p>Methodology to evaluate and demonstrate successful satisfaction of the TLMP's Mission and Objectives from Section 1. Acceptance Criteria and Plan Overview of performance Management processes Definition of Entry and Exit Criteria for the next phase of the programme and for the subsequent phases. Learning from Experience Plan Post-Programme Evaluation Plan Process for reviewing and updating the TLMP Use of a through-life Maturity Model</p>

Typical Tasks to be carried out during the Preparation Phase

The following list provides an indication of the typical tasks that could be undertaken in a programme Preparation Phase, recognising that every programme will be different.

No	Task	Resources (Skills)
1	To analyse and understand the military needs and the operational characteristics	Military experts with support from Armaments experts and R&T experts
2	To carry out a functional analysis and elaborate a functional statement of work for the subsequent phase	Armaments experts with support from functional/value analysis experts and Military experts
3	To elaborate one or several possible system architectures	Armaments experts with support from R&T experts and Military experts
4	To analyse and define the interfaces of the system or activities	Armaments experts with support from R&T experts and Military experts
5	To verify that the possible solutions and the maturity of required technologies comply with the functional analysis, and to prepare and issue the possible RFI needed for this task	Armaments experts with support from R&T experts and Military experts
6	To compare possible system architectures and possible solutions and construct a system hierarchy	Armaments experts with support from R&T experts and Military experts
7	To analyse the possible impact upon the environment	Armaments experts with support from R&T experts and Military experts
8	To analyse logistic support, maintenance, education, training, test and repair assets issues	Military experts with support from logistic support experts and from Armaments experts
9	To elaborate a support strategy and define a support architecture, and to prepare and issue the possible RFI needed for this task	Military experts with support from logistic support experts and from Armaments experts
10	To carry out a value analysis based on the functional analysis and different level of performances	Armaments experts with support from R&T experts and Military experts

11	To assess the impact of national and international regulations (e.g. ordnance safety and environmental legislation)	Armaments experts with support from Military experts and domain experts
12	To produce a risk management plan, assess the risks across all capability lines of development and record them in a risk register, assess their criticality and potential impact (time, cost and performance), and propose mitigating actions.	Armaments experts with support from risk management experts
13	To analyse costs issues and budget resources, to estimate costs and life cycle cost of the programme, and to conduct parametric cost estimation and/or prepare and issue a possible RFI needed for this task	Armaments experts with support from cost assessment experts
14	To prepare financial planning and the corresponding timescales	Armaments and Military experts with support from budget/finance experts
15	To assess the possible contractors and the possible industrial organisation	Armaments experts with support from Industry and Market experts
16	To establish one or several acquisition strategies	Armaments experts with support from procurement experts and from Industry and Market experts
17	To anticipate the possible subsequent progression of the programme to an executive agency (including the a cM acting as an executive agency) and the elaboration of the corresponding arrangement, and to address IPR, export and all necessary legal issues	Armaments experts with support from international arrangement/legal experts and with the support of an executive agency
18	To check the global compliance of capability, military, technical, budget, TRL, ... aspects	Military experts with support from Armaments, R&T and Industry and Market experts
19	To analyse interface issues with other programmes	Armaments experts with support from Military experts
20	To report all results of the tasks carried out during the preparation phase within the CSR, TLMP and Business Case.	Armaments and military experts

BUSINESS CASE FRAMEWORK
(Resulting from the Output of a ‘Preparation Phase’)

The key principles that a Business Case usually addresses are:

- What is the operational capability requirement?
- How could the requirement be filled over the required time period?
- How can best value for money/cost effectiveness/benefits be established?
- What certainties and risks remain?
- How is the capability to be procured/supported/accepted?

The suggested template below is a recommended content of a Business Case that would provide the objective evidence and argument to support a national decision to cooperate with the other cM in the next phase(s) of a programme. It is not intended to be put to the EDA Steering Board for a decision.

Each programme will be different but it is expected that a Business Case of 6-8 pages would be sufficient. The Business Case is not a repository for all programme information or an executive summary. Instead it should address those issues relevant to senior officers responsible for making a national decision to continue with the programme. Supporting information to the Business Case should be contained in the Common Staff Requirement and a Through-Life Management Plan, both of which can be annexed to the Business Case.

SUMMARY

Set out the key, high-level features of the Business Case that can be released to all pMS.

ISSUE

Short summary statement e.g. “Way forward for Ad hoc Project/Programme X”

RECOMMENDATION

Clear statements on the key elements of the Business Case. This might include:

- Reference to the Key capability requirements drawn from the CST and CSR at Annex
- The estimated in-service date
- The preferred option(s)
- The expected procurement strategy (ies)
- The expected co-operation strategy (ies)
- The principal risks at this stage at Annex
- Short purpose of the next Phase
- Likely costs of the next Phase
- Key milestones and plan of work for the next Phase at Annex
- The estimated whole-life costs for the programme
- The likely in-service support arrangements (solution and organisation)
- Others

TIMING

A brief explanation of why the decision needs to be taken by a specified date.

DETAIL

This is the main body of the Business Case and should clearly state:

Requirement

On the basis of the CST and CSR, outline the capability gap and a clear statement on what the requirement is, including the nature of the requirement being addressed and any linkages to other previous or expected capabilities within the cM or at an international level. Outline the hierarchy of requirements, their flexibility and the potential for an incremental approach.

Options

A brief explanation of each of the options considered, including a 'do nothing' option, a 'do cooperatively' option and a combined 'do nationally' option. Explain why options have been eliminated from the analysis.

Options Analysis

Explain the methodology used in assessing the relative merits of different options and their capability consistency, including reference to the results of the Investment Appraisal (conducted on a whole-life basis and across all relevant Lines of Development) where required, and their technical feasibility through system and technology readiness levels.

The paper should clearly state the most cost-effective and technically feasible option as well as the option that represents best value from a European perspective when the relevant wider factors are considered.

The potential benefits of proceeding in cooperation and the loss of benefits if not should be explained.

Support

Outline how the recommended option(s) is planned to be supported in-service,

including the proposed management organisation.

Education and training

Outline the education and training needs for the recommended option(s), including the proposed management organisation.

Withdrawal and disposal

Outline how the equipment is planned to be withdrawn from service and disposed of.

Interoperability

Outline how interoperability is planned to be enhanced, including reference to key military and/or civil standards existing or to be developed.

Affordability

The focus should be on identifying major cost drivers and affordability issues such as peaks and troughs in spend profiles, and how these might be mitigated through cooperation or other management methods.

A table of expected cost per year for the next phase of the programme and how these are intended to be shared amongst the cM should be presented. In addition, a table of expected cost for the whole life cycle should be presented, in order to assess the overall affordability for the programme.

Procurement & Commercial Strategy

Expose the technology and procurement options that are potentially available to

meet the requirement.

Identify any options that are unlikely to deliver a viable solution with a clear rationale for those that are not going to be pursued.

If possible, outline the proposed procurement strategy for the recommended option (e.g. sole source, competition, buy/lease, Public Private Partnership etc.), who will act as the procurement agent (e.g. OCCAR) and relevant elements of the commercial strategy (e.g. how has industry been/to be engaged, firm or max prices, incentives, etc).

International Co-operation

Explain the consistency of military needs and planning amongst the contributing Members, possible discrepancies, and the foreseen co-operation strategy for the next phases of the programme.

Risks

Based on the results of the Preparation Phase, expose the key risks to the achievement of the next phase and the programme as a whole in terms of impact on cost, capability and timescale.

Include an explanation of how the risks have been allocated; the performance time and cost impacts of the risks; how each risk will be managed and the fall-back measures should a risk materialise.

OCCAR's Programme Decision template could be used as prompt for the broad range of issues that may need to be addressed.

Arms control and Legal Issues related to the use of the Capability

For example an assessment of new weapons, means and methods of warfare, as required by Article 36, the First 1977 Additional Protocol to the 1949 Geneva Conventions.

Industrial Issues

Highlight any industrial implications and how they relate to the proposed procurement strategy and the wider EDTIB. Indicate export potential and conditions, and possible security of supply, third party dependencies, IPR and security of information issues.

Safety & Environmental Considerations

Highlight the main safety and environmental impacts through the life of the equipment and in the event of an accident or emergency. Whether any of these impacts are covered by specified safety or environmental standards, legislation or policy, and what could be done to reduce impacts to acceptable levels.

The Next Phase

Explain the intentions for the next phase (e.g. the Definition phase) with estimates for the cost, capability and timescales envelope within which the phase will be conducted, the main deliverables expected, and entrance and exit strategy for cM.

Whole-life costs

On the basis of a Through-Life Management Plan, outline the main assumptions and the cost estimates for the subsequent phases (development, production, support and disposal) and indicate how these costs might be shared amongst the

cM.

Wider Issues

Interfaces with other European bodies (e.g. use of dual use technologies), CSDP, NATO programme plans (to avoid duplication), political considerations and others.

Definitions of IDT, PT, PG and AHPG

Integrated Development Team

The role of the Integrated Development Team (IDT) is to analyse capability improvement requirements, assess actions already underway, and consider feasible alternatives before proposing to the SB what, and where, effort should be placed. It will identify options for collaboration through analysis across its section of the capability spectrum and to set the conditions for, and facilitate, subsequent development into concrete collaborative work.

Project Team

The role of the PT task is to define and harmonise the military needs across all defence lines of development and to identify possible partnership groupings between pMS. The main output from the PT is an agreed Common Staff Target (CST). Where this CST is equipment related, the PT would become the Preparation Group for the associated EDA Ad hoc Project.

Preparation Group

The role of the Preparation Group is to conduct a preparation phase in accordance with this Guide. The main output is a Business Case, supported by a CSR and TLMP, in order to define the performance, time and financial boundaries, and provide evidence to support the cM decisions regarding the next phase of the programme.

Ad Hoc Programme Group

The role of the Ad Hoc Programme Group (AHPG) is to define and set up the practical arrangements for the next phase(s) of the programme in conjunction with the chosen acquisition organisation.

Document Change History

Issue	Date	Comments
Draft 01	18 December 2008	Compilation of documents presented to October 2008 Steering Board and those developed with pMS.
Draft 02	23 January 2009	Inclusion of Outline Description template. Re-numbering of annexes.
Draft 03	29 October 2009	Revision of the Guide text flowing feedback from the test case projects (FUAS, MMCM and BIO EDEP). Update of the Business Case Framework; the addition of a Concise Guide to Cooperative Programmes, a Through-Life Management Plan Framework and a Maturity Assessment Framework; plus definitions of IDT, PT, PG and AHPG.
Draft 04	06 January 2010	Following pMS feedback and internal EDA review, further revision to simplify the text and reference rather than annex the Outline Description, Concise Guide and Maturity Assessment Framework.
Draft 05	30 April 2010	As a result of the Armaments Strategy Team Meeting on 10 March 2010, the Business Case is made the main output of Preparation Phase, with the CSR and TLMP as supporting documents. Additionally a summary of the Business Case is to be provided to all pMS at the end of the Preparation Phase.
Draft 06	01 July 2010	Clarification of EDA's role once a programme has been transferred to an executive Agency
Review 2012	June 2012	Update of legal reference (council decision 2011/411/CFSP repealing Joint Action) and editorial amendments