



OCCAR-EA
OCCAR Management Procedure

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Record of changes

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List of acronyms

BoS	Board of Supervisors
CO	Central Office
OMP	OCCAR Management Procedure
PMSD	Programme Management Support Division
TDP	Technology Demonstrator Programme

1. Purpose

The aim of this annex is to establish a policy framework for the effective management of Technology Demonstrator Programmes (TDPs) by OCCAR-EA.

2. Nature of TDPs managed by OCCAR-EA

The purpose of TDPs is to show, usually in advance of programme development, that a certain technology can or cannot be applied to operationally effective systems. TDPs can be divided into two main categories: those which are an extension of research and those which are equipment or programme related. To gain maximum benefit from management by OCCAR-EA, TDPs should be linked to a specific planned equipment or programme or have a multiple application to a number of planned equipments or programmes. Equipment or programme TDPs are an important component in the long-term reduction of programme risk and the early involvement of OCCAR-EA is therefore likely to increase the long-term efficiency and effectiveness of OCCAR-EA management of any resulting equipment programmes. This annex therefore concentrates on equipment and programme related TDPs.

3. Possible routes for the integration of TDPs into OCCAR

There are three possible routes by which a TDP may be considered for management by OCCAR-EA:

- A pre-existing collaborative TDP which is transferred by the Participating States to OCCAR-EA;
- An assignment from the Participating States, directly or through the European Defence Agency, to establish a TDP against nationally or jointly derived requirements;
- In certain circumstances, a proposal from OCCAR-EA to the Board of Supervisors (BoS), aimed at improving value for money based on information gleaned primarily from the Nations.

A thorough assessment of the benefits and drawbacks of the integration of any TDP activity should be made on a case-by-case basis by the relevant stakeholders.

4. Decision making process

The decision making process for TDPs is basically the same as for other programme activities, i.e. the integration is subject to BoS approval through an Integration Decision and a Programme Decision will set out the process by which OCCAR-EA should manage the TDP. Participation of non-Member States should also follow agreed OCCAR procedures. However, participation in an OCCAR-managed TDP will not be considered as fulfilling the programme participation criterion pertaining to OCCAR membership.

5. Rules, regulations and procedures

The rules, regulations and procedures to be applied, including in particular Intellectual Property Rights, handling of sensitive information, etc, are the ones applicable for the management of development and production programmes. The full range of OMPs will therefore apply.

6. Management models

Decisions made by the Member States and programme Participating States on the relevant management model will be handled on a case-by-case basis. Three management models could be considered. Their use will depend on the scale of the proposed TDP activities and the requirements of the Nations. Judgements will need to be made on the relative benefits of minimising management costs and ensuring the security of sensitive material.

6.1 Management Model A: Dedicated Programme Division

TDPs, either *ab initio* or deriving from an existing activity, will normally be managed by a dedicated OCCAR-EA Programme Division. The size and structure of such Division will depend on the envisaged workload.

6.2 Management Model B: Management by the Central Office within existing resources

This management model may be applied for small-scale or easy to manage activities which could reasonably be absorbed within existing Central office resources with little risk. Short-term secondment of national experts may be required to support this activity on an ad hoc basis. When not derived from existing OCCAR Programmes, these activities could be managed by the Programme Management Support Division (PMSD) through a matrix management approach, i.e. managed by a designated officer and drawing upon Central Office (CO) support in the financial, contracting, risk management, quality assurance and other domains.

6.3 Management Model C: Management by the Central Office with additional resources

This management model may be applied for more manpower-intensive activities or growth from models A or B, the workload of which could not be fully absorbed by existing CO or Programme Division resources but would not warrant the establishment of a dedicated TDP Division. In this model a small number of additional TDP-specific staff would augment PMSD and the Central Office would host the TDP activity through a matrix management approach. Short-term secondment of national experts may also be required on an ad hoc basis.

The use of the management models B and C will require approval by the BoS within the framework of the Integration Decision and by the Participating States within the framework of the Programme Decision.