

Information Technology/Academia Collaboration (ITAC) Program

# Funded Projects Guide

ITAC Collaborative Funded Projects

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## Disclosure

It is of utmost importance to share with the ITAC Program any information relevant to applications filed by the project team to other funding agencies (local or international), before or during the funding of this project by the ITAC. If previous funds were received for a project in the same technology, the project team should provide the details of the deliverables of the funded project to the ITAC before starting the funding process.

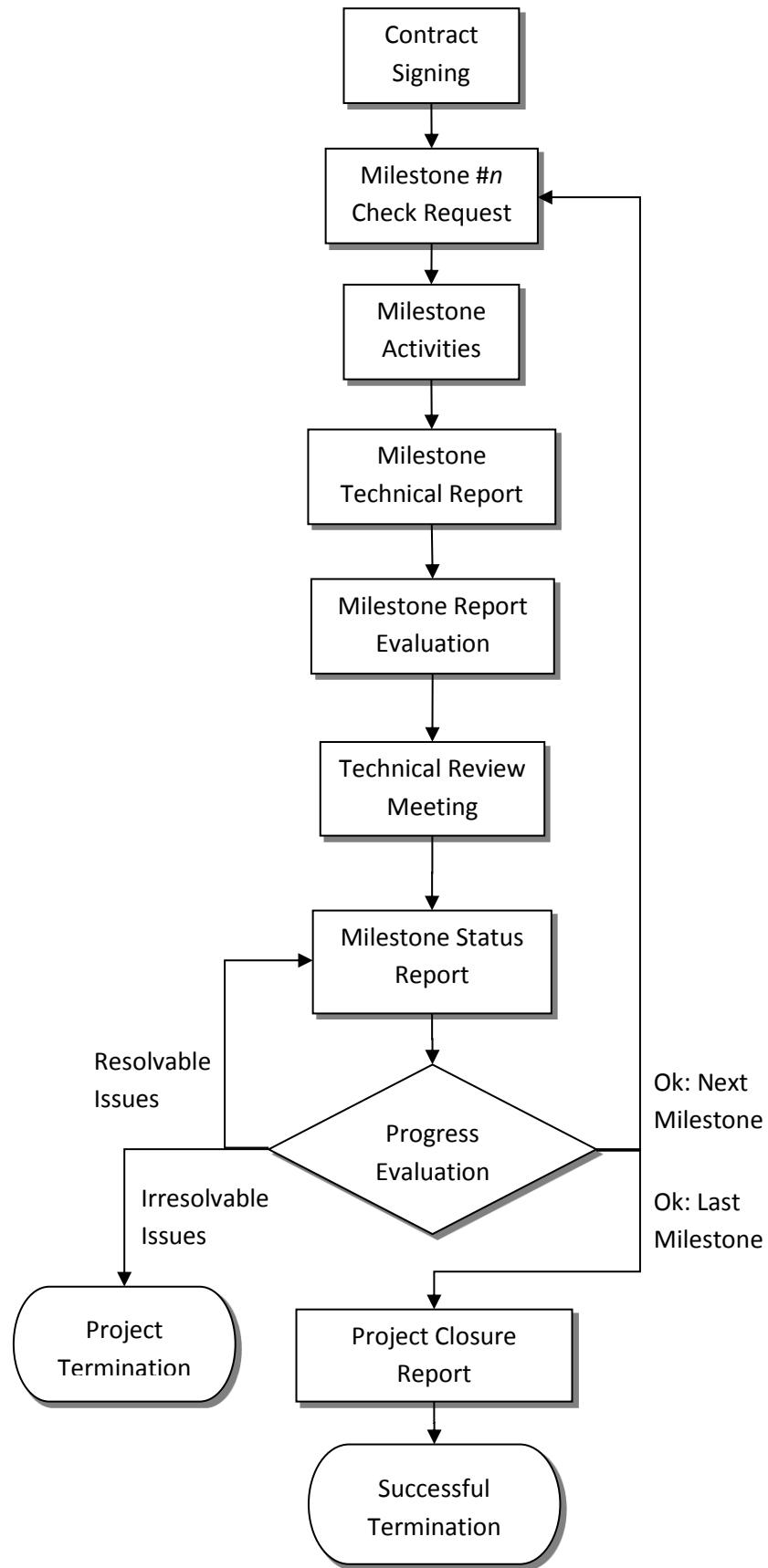
## 1 Introduction

The ITAC program mission is: ***“to bring value to Egyptian ICT industry by fostering collaboration between industry and academia aiming at developing R&D based innovative products and services that put Egyptian ICT companies in a leading position in the ICT market, both locally and internationally.”***

The above goal is to be achieved through funding outstanding and innovative projects, which yield products and/or services that are envisaged to penetrate the local and international markets. We hope that this goal is clear in the minds of all the project stakeholders and the outcome of this project benefits all parties and the community at large.

The ITAC program funds Collaborative Funded Projects (CFPs) in a process that can be summarized in the flowchart shown below, and detailed carefully in this guide. Following this process will guarantee smooth flow of the project from milestone into the other. Two key practices should be observed by all parties:

1. **Transparency**: The project team should share with the ITAC team any changes incurred to the project plan, whether it is in the budget items, the team members, or the milestone start date and duration.
2. **Documentation**: The project team should have documentation for all activities related to the project and communicate any issues to the ITAC team in a documented form, whether by e-mail or by formal written requests. Standard issues are handled by forms or templates that the ITAC team shares with the project team at the beginning of the project execution.



## 2 Contract Preparation

The step that precedes the project funding is the signing of the contract between ITIDA and the project beneficiaries, typically an ICT company and an academic institution. An empty contract template is first sent to the project principal investigator (PI) and industrial partner (IP) to fill in the missing parts and provide necessary information and documents which are:

1. The contract signees' information (full name, ID number ... etc.)
2. Photocopies of signees' IDs.
3. Photocopies of the company tax card and commercial registration.
4. Brief description of the project outcome and impact.
5. Agreement between fund beneficiaries concerning the intellectual property rights and revenue sharing.
6. The list of the project team members and their roles.
7. The project budget.
8. The project execution plan.

Once the above information and documents are available, the contract is finalized and a contract signing date is set.

## 3 Project Execution Management

### 3.1 Project Focal Point

Upon signing the contract, the project is expected to be funded and executed as per the plan embedded in the contract annexes. Typically the project activities are divided among milestones, each lasting from 3 to 5 months. After the contract signing, the PI will receive an e-mail from the ITAC team introducing the project **focal point** from the ITAC side and providing all forms/templates that will be used during the project lifetime.

*☞ All correspondences related to the project should be directed only to this **focal point**, copying the project leaders and the ITAC team members copied in the first e-mail. The ITAC focal point will interface with any other needed functions in ITIDA.*

### 3.2 Project Technical Auditor

For each of the funded projects, the ITAC program assigns a technical auditor from the experts in the project technology to monitor the progress of the project execution. The auditor is responsible for:

1. Evaluating the technical reports submitted by the PI.
2. Holding technical meetings with the project team to discuss the technical progress.
3. Providing consultation to the ITAC team in any issues related to the project execution.

## 4 Project Funding and Execution Process

### 4.1 Milestone Payment Request

- To receive the payment of any milestone, the PI should send a request to the ITAC focal point to issue the check of this milestone (refer to the **Milestone Check Release Request**). The focal point will notify the PI when the check is ready to be collected.
- Typically, the PI notifies the IP to send a messenger with a formal stamped delegation letter to collect the check.

### 4.2 Milestone Change Request

- During each milestone, the project leaders may need to make some changes related to the budget items, the team members, or the milestone duration.
  - Any such changes should be corresponded by a change request filed by the project PI using the appropriate template (refer to the **Milestone Change Request**) and supported by proper explanation for the need of such change.
  - The ITAC focal point may share such requests with the technical auditor to seek his approval.
  - The project PI should receive a response for every change request (approval or modifications).
- ☞ *Any changes in the project plan that are not communicated to the ITAC team a priori may be rejected. It is thus extremely important to be as transparent as possible whenever a change is anticipated in the project plan.*

### 4.3 Milestone Technical Report and Meeting

- Toward the end of each milestone (typically a few weeks before its end), the PI is expected to send the ITAC focal point the technical progress report (refer to the **Milestone Technical Report**).
- The ITAC team will share the report with the technical auditor to study it and, in parallel, will start scheduling the milestone review meeting.
- After the review meeting, the technical auditor will fill in the technical section of a **Milestone Status Report**, which is an internal report that is kept in the ITAC log of this project.
- Should there be any technical issues that need to be finalized before proceeding to the next milestone; the ITAC focal point will communicate them to the PI, who will, in turn, file another Milestone Technical Report addressing these issues.

### 4.4 Milestone Financial Settlement

- In parallel to the technical auditing, the project is financially controlled by the ITAC team as per the approved budget in the contract and the related change requests filed **in advance**.
- The financial officer/PI will be requested to send us the following documents at the end of each milestone:-
  - The **Milestone Financial Summary** forms including the milestone budget table, list of invoices and receipts, supporting documents ... etc. signed by the PI and stamped from the company for PDPs, ARPs and the university for PRPs. Each invoice should be given a code: for e.g. MS1.INV1 for invoices and MS1.INV1.SD1 for supporting documents ... etc.

- A scanned version of all the invoices and documents, in the same order as written in the lists. Each document/invoice should be in separate scanned file using the same code as the filename.
- After reviewing the submitted documents, the ITAC will send back any comments, and in case the documents are complete, the PI/financial officer will receive approval message requesting the hardcopies to be sent by courier or by hand.
- The needed financial documents are typically:
  - Original receipts for purchased items.
  - Signed and stamped list of salaries (in Arabic) providing the national IDs and signatures of recipients.
  - Change requests related to any budget items.
- Upon processing the documents above, the milestone is settled financially and the status report financial section is completed.
- Should there be any financial issues that need to be finalized before proceeding to the next milestone; the ITAC focal point will communicate them to the PI and/or IP, who will, in turn, attend to such issues to conclude the milestone.

The process from Section 4.1 to 4.4 is repeated till the last milestone is reached.

## 4.5 Project Closure Report

When the technical and financial audit of the last milestone is concluded, the PI is required to submit a consolidated report for all the technical and financial activities the project went through during its execution. The closure report (refer to the **Project Closure Report** template) is the most important document since it presents a concise reporting of the project output, best practices, lessons learnt, and market prospects.

## 5 Other Issues

### 5.1 Applying to the Next Project Category

- If the project team wishes to apply to the next level of projects (ARP if their project is PRP or PDP if their project is ARP) or wish to extend the scope of their project, upon successful conclusion of their current project, a new proposal should be submitted to the ITAC.
- Although the submitted proposal will undergo the same review process, the new proposal does not have to stick to the submission window time frame of the ITAC rounds; it will be evaluated as soon as it is received.
- To guarantee seamless transition from the ongoing project to the next project, the applicants are encouraged to submit their proposal within the round that precedes the planned end date of their project so that the review result and decision are reached by the time the current project ends.

## 5.2 Patent Filing

ITIDA encourages the Egyptian inventors to patent and commercialize their inventions by covering the expenses of the patent filing process for the **patents resulting from ITIDA funded projects** with a maximum of **USD 10000 per patent**. The PI can request the needed application form to apply for the patent filing from the ITAC focal point.

## 6 Other Assessments

### 6.1 Testing Process Assessment

ITIDA's Software Engineering Competency Center (SECC) is collaborating with the ITAC Department in the testing process assessment of beneficiary ICT Companies as applied to the ITAC CFP target product/solution. Passing SECC Testing Process Assessment is a prerequisite to request funds from ITAC in future rounds and/or move from ARP phase to PDP phase.

SECC team will assess the company (during/after the **last milestone**) in a **3-days pre-paid assessment process**. If the company fails to pass the assessment, it will be requested to resolve the issues raised in SECC report and another reassessment visits will be conducted after that. Unfortunately, if the company does not pass the reassessment test, it will not be eligible to benefit from any services offered by ITIDA.

### 6.2 Marketing Assessment

ITAC has put in place a comprehensive support program for its CFP beneficiaries that includes marketing assessment with an advisory support for eligible beneficiaries for shortlisted proposals. Beneficiaries are advised to develop and complete the relevant marketing and commercial plans that will be sent by ITAC team as a separate document, for the shortlisted Advanced Research Projects (ARP) and Product Development Projects (PDP) phases.

All marketing and commercial Plans will be assessed by ITAC marketing advisory team that will ensure that its beneficiary have put in place a solid marketing and commercial study for their relevant projects. This should help increase projects success rate for its beneficiaries and ensure higher business sustainability in the future. Accordingly, a comprehensive report will be developed by the advisory team highlighting the status of the marketing plan and areas of development. This report will be scheduled as per the agreed milestone deliveries stated in the CFP proposal for the ARP and PDP phases.

According to the issued marketing assessment report, the beneficiaries might be scheduled for a marketing advisory session with selected marketing consultants to support the beneficiaries with their marketing and commercial plans.