**Final Technical Report Cover Page**

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **BIRD Ref. No.:**  \_\_\_\_\_\_\_\_**To**:  **Israel-U.S. Binational Industrial Research and Development Foundation** **Project Title:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**Submitted by:**Israeli Company:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_U.S. Company: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**Type of Report: Final -** Segment # : \_\_\_\_\_**Project Effective Date** (Start Date DD/MM/YY):\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**Project Completion Date** (End Date DD/MM/YY):\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**Dates of Reporting Segment Covered** (MM/YY): from \_\_\_\_\_\_\_\_\_\_\_\_\_\_ to \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **Signatures:**  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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| **Project Manager**:  | **Israeli Company** | **U.S. Company** |
| **Printed Name:** |  |  |
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**Date Submitted (DD/MM/YY): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** |

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# 2. Objectives and Work Performed During the Segment

Review the project's overall objectives, and the work performed to achieve these goals, as defined in the project proposal or approved changes to the development program plan. Please detail if there were any changes made to the project plan or the project objectives (the reasons for these changes and their ramifications).

# 3. Summary of Accomplishments

Provide an informative summary of the **activities**, **methods, results,** and **accomplishments** of the development work conducted in the period covered and compare the actual accomplishments with the objectives stated in Section 2 above. The summary should be self-sufficient and understandable to someone who reads nothing else in the report. **Add diagrams, charts, images, and any other illustrations that will exemplify your results and accomplishments.**

# 4. Results - Summary of Milestones and Deliverables

Describe, with reference to the Program Plan (see also Annex D of the CPFA) and the Planned Milestones & Deliverables (see also Annex E of the CPFA) submitted in the project proposal, the results obtained during the reporting segment on an activity-by-activity (task-by-task) basis. Identify and describe results that represent significant variations from the Program Plan. Discuss any activities/tasks that may have been eliminated or added to the Program Plan during the reporting period and explain such changes. Indicate how such modifications will affect the nature of the product being developed in terms of features, specifications, performance, marketability, time-to-market, etc.

List the milestones attained and the deliverables available in this reporting segment resulting from progress in the project during previous segments and during this segment. In addition, list the milestones and deliverables that represent significant deviation (lag) in their scope and due dates from the most recently updated plan, and explain the reasons for the deviations.

*NOTE: Copy to your report and use the table below to report the above-mentioned status of the milestones and deliverables. (Add or delete table rows as needed)*

**Summary of Tasks attained in this Segment**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Task No.** | **Task Name** | **Responsibility & proposed timeline** | **Status & Progress** | **% Completion** |
| 1 |  |  |  |  |
| 2 | .......... | ......... | .......... | ......... |
| 3 | .......... | ......... | .......... | ......... |
| 4 | .......... | ......... | .......... | ......... |
| 5 | .......... | ......... | .......... | ......... |

**Summary of Milestones and Deliverables attained in Segment**

|  |  |  |
| --- | --- | --- |
| **#** | **Milestones Attained in Previous Segments**(Definition / Description) | **Attained Milestone Date** (MM/YY) |
| 1 |  |  |
| 2 |  |  |
| 3 |  |  |
| **#** | **Deliverables Available in Previous Segments**(Definition / Description) | **Available Deliverable Date** (MM/YY) |
| 1 |  |  |
| 2 |  |  |
| **#** | **Milestones Attained in This Segment**(Definition / Description) | **Attained Milestone Date** (MM/YY) |
| 1 |  |  |
| 2 |  |  |
| 3 |  |  |
| **#** | **Deliverables Available in This Segment**(Definition / Description) | **Available Deliverable Date** (MM/YY) |
| 1 |  |  |
| 2 |  |  |
| **#** | **Milestones Planned for but Not Yet Attained in This Segment**(Definition / Description **and reasons for the lag** ) | **Most Recently Planned Milestone Date** (MM/YY) |
| 1 |  |  |
| 2 |  |  |
| 3 |  |  |
| **#** | **Deliverables Planned for but Not Yet Available in This Segment**(Definition / Description **and reasons for the lag**) | **Most Recently Planned Deliverable Date** (MM/YY) |
| 1 |  |  |
| 2 |  |  |

# 5. Graphical Comparison of Actual/Planned Activities Versus Program Plan

**You can use EXCEL/MS PROJECT or any other tools for the Gantt chart display**
Using the Program Plan (Annex D of the CPFA) and the tasks described there, show graphically (Gantt chart) the actual timing and status of project activities (tasks) carried out thus far and explain deviations from the Program Plan. Likewise, use the Gantt chart of the Program Plan to show the revised planned activities (tasks) graphically for the remainder of the project and explain deviations from the Program Plan. (Explain all symbols used in the plan.) For each task, whether it has been completed, is still being carried out, or is planned later on in the project, indicate graphically in a single chart (1) its original program plan timing, (2) its actual occurrence and % completion at the end of the reporting segment, and (3) its planned (and maybe re-scheduled) occurrence in the remainder of the project.

# 6. Cooperation between the Companies

Discuss the activities conducted during the reporting segment that have enabled the companies to keep abreast of each other’s progress. Has the division of tasks or responsibilities between the two companies been integrated to mutual benefit? Any problems that have developed in this regard should be noted, along with details of corrective measures taken or planned.

# 7. Risk Analysis

**7.1** **Risk Analysis****:** Please insert in the table the original risk analysis data that was presented in the proposal.

|  |  |  |  |
| --- | --- | --- | --- |
| **Risk #** | **Name/Description** | **Ranking** | **Impact** |
| **Duration1** | **Budget2** | **Commercialization Potential3** |
| 1 |  |  |  |  |  |
| 2 |  |  |  |  |  |
| 3 |  |  |  |  |  |
| 4 |  |  |  |  |  |
| 5 |  |  |  |  |  |
| 6 |  |  |  |  |  |

|  |  |  |
| --- | --- | --- |
| **Risk #** | **Description** | **Type\*** |
|
| 1 |  |  |
| 2 |  |  |
| 3 |  |  |
| 4 |  |  |
| 5 |  |  |
| 6 |  |  |

Original table of main risks: **1.** Duration of the project extended by the given amount; **2.** Cost of project increases by the given percentage; **3.** Forecasted sales in the next 3 or 5 years reduced by the given percentage

**\*Type:** Technical **(T)**, Project Management/Resources **(M)**, External to the Project **(E)**

**7.2 Updated Risk Status**: Please insert here updated Risk Analysis tables depicting the current project situation (using the instructions and tables below). Add explanations to the differences between the original and the current situations.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Risk #** | **Name/Description** | **Ranking** | **Impact** | **Current Status** |
| **Duration1** | **Budget2** | **Commercialization Potential3** |
| 1 |   |  |  |  |  |  |
| 2 |  |  |  |  |  |  |
| 3 |  |  |  |  |  |  |
| 4 |  |  |  |  |  |  |
| 5 |  |  |  |  |  |  |
| 6 |  |  |  |  |  |  |

**Updated table of risks: 1.** Duration of project extended by the given amount; **2.** Cost of project increases by the given percentage; **3.** Forecasted sales in the next 3 or 5 years reduced by the given percentage

**Key**

|  |  |
| --- | --- |
| **Ranking** | **Probability of Risk Occurring** |
| High | Above 50% |
| Medium | 30 – 49% |
| Low | 10 – 29% |
| Very Low | 1 – 10% |

|  |  |
| --- | --- |
| **Impact** | **Duration1** |
| High | Above 6 months |
| Medium | 3 to 6 months |
| Low | Below 3 months |

|  |  |
| --- | --- |
| **Impact** | **Commercialization Potential3** |
| High | Above 50% |
| Medium | 30% to 50%  |
| Low | 1% to 29% |

|  |  |
| --- | --- |
| **Impact** | **Budget2** |
| High | Above 20% increase |
| Medium | 10% to 20% increase |
| Low | Below 10% increase |

 **Explain the differences between the original (as identified in the proposal) and the current risk analysis by the end of the project. Explain the reasons for the differences and their potential impact.**

# 8. Market and Commercialization Plans

Identify any important changes in the market or your commercialization plans that have developed during the segment covered by the report. Explain such developments and their impact on the overall development program plan and budget and the overall commercialization plans and schedule.

Provide your roadmap to commercialization and the activities you have achieved and plan to have following the completion of the project (product presentation, trade fairs, contacts with customers/distributors, pilots etc.).

# 9. Future Activities

Provide a detailed description of the following; in respect to 1st and 2nd year after completion of the development work period (see section P of CPFA);

1. Future development work planned, jointly and/or separately, related to the Product
2. Marketing activities to be undertaken, either together and/or individually, as part of Product sales efforts

# 10. Published Material

Attach a copy of any reprint (not submitted in a previous report) that is based, in whole or in part, on the work conducted in the BIRD project. Include a report on any inventions or patents filed. Technical and user manuals do not have to be submitted.

# 11. Updated Market Forecast

Please describe the project’s outcome in commercial terms, including the market acceptance of the products or processes developed, current sales forecasts for at least the next 3 years, new product opportunities, and any further activities planned jointly by the project partners. Compare the current sales forecasts with those made in the project proposal and explain the difference.

**Definition (name) of Products and Markets**

Use the yellow cells below to summarize the potentially 2 products and 2 market segments that are the result of the project deliverables – Fill in the details of the valid combinations: (For example, if there are two products and only one market segment, then – fill only the tables for Product 1 and Market A, and Product 2 and Market A).

These tables should reflect the full market potential of the project’s deliverable.

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  |  | Market A | Market B |  |  |  |
|  | Name |   |   |  Name | Please enter a short name to define each product and market |
| Product 1 |   | **1A** | **1B** |  |  |  |
| Product 2 |   | **2A** | **2B** |  |  |  |

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Market A:** |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |
| **Product 1:** | Product name: |  |  |  |
|  | Product description, including key specifications, features and performance characteristics: |   |
|  |   |   |   |   |   |   |   |
|  | Extent to which product was developed within the scope of the BIRD project: |   |
|  |  |  |  |  |  |  |  |
| **Market A:** | Market / application name: |  |  |  |
|  | Describe the market and specific applications to which the product will be targeted: |   |
|  |      |
|  | Describe to what extent has this market / application changed relative to the one referred to in the proposal, and why: |   |

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Market A:** |  |  |  |  |  |  |  |
| **Product 1:** | **Current Forecast of Sales / Licensing Revenue:** |
|  |  |  |  |  |  |  |  |
|  | Identify and discuss any important changes in your product commercialization plans that have developed during the project and their possible impact on the rate and magnitude of revenues over the next 1-3 years:  |   |
|  |  |  |  |  |  |  |  |
|  | Explain the reasons for any major difference (if any) in forecasted revenue (both in timing and in magnitude) from the original forecast provided in the project proposal: |   |
|  |  |  |  |  |  |  |  |
|  | Discuss the difficulties/threats/uncertainties in marketing/sales that might be faced in the next 1-3 years that might influence the current revenue forecast: |   |
|  |  |  |  |  |  |  |  |
|  | Discuss any new downstream (1-3 years) product opportunities based on the technology developed in the project:  |   |
|  |  |  |  |  |  |  |  |
|  | Describe any further joint activities planned by the project partners: |   |

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Market A:** |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |
| **Product 2:** | Product name: |  |  |  |
|  | Product description, including key specifications, features and performance characteristics: |   |
|  |   |   |   |   |   |   |   |
|  | Extent to which product was developed within the scope of the BIRD project: |   |

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Market A:** |  |  |  |  |  |  |  |
| **Product 2:** | **Current Forecast of Sales / Licensing Revenue:** |
|  |  |  |  |  |  |  |  |
|  | Identify and discuss any important changes in your product commercialization plans that have developed during the project and their possible impact on the rate and magnitude of revenues over the next 1-3 years:  |   |
|  |  |  |  |  |  |  |  |
|  | Explain the reasons for any major difference (if any) in forecasted revenue (both in timing and in magnitude) from the original forecast provided in the project proposal: |   |
|  |  |  |  |  |  |  |  |
|  | Discuss the difficulties / threats / uncertainties in marketing / sales that might be faced in the next 1-3 years that might influence the current revenue forecast: |   |
|  |  |  |  |  |  |  |  |
|  | Discuss any new downstream (1-3 years) product opportunities based on the technology developed in the project:  |   |
|  |  |  |  |  |  |  |  |
|  | Describe any further joint activities planned by the project partners: |   |

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Market B:** |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |
| **Product 1:** | Product name: |  |  |  |
|  | Product description, including key specifications, features and performance characteristics: |   |
|  |   |   |   |   |   |   |   |
|  | Extent to which product was developed within the scope of the BIRD project: |   |
|  |  |  |  |  |  |  |  |
| **Market B:** | Market / application name: |  |  |  |
|  | Describe the market and specific applications to which the product will be targeted: |   |
|  |  |   |   |   |   |   |   |
|  | Describe to what extent has this market / application changed relative to the one referred to in the proposal, and why: |   |

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Market B:** |  |  |  |  |  |  |  |
| **Product 1:** | **Current Forecast of Sales / Licensing Revenue:** |
|  |  |  |  |  |  |  |  |
|  | Identify and discuss any important changes in your product commercialization plans that have developed during the project and their possible impact on the rate and magnitude of revenues over the next 1-3 years:  |   |
|  |  |  |  |  |  |  |  |
|  | Explain the reasons for any major difference (if any) in forecasted revenue (both in timing and in magnitude) from the original forecast provided in the project proposal: |   |
|  |  |  |  |  |  |  |  |
|  | Discuss the difficulties/threats/uncertainties in marketing/sales that might be faced in the next 1-3 years that might influence the current revenue forecast: |   |
|  |  |  |  |  |  |  |  |
|  | Discuss any new downstream (1-3 years) product opportunities based on the technology developed in the project:  |   |
|  |  |  |  |  |  |  |  |
|  | Describe any further joint activities planned by the project partners: |   |
|  |  |  |  |  |  |  |  |

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Market B:** |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |
| **Product 2:** | Product name: |  |  |  |
|  | Product description, including key specifications, features and performance characteristics: |   |
|  |   |   |   |   |   |   |   |
|  | Extent to which product was developed within the scope of the BIRD project: |   |
|  |

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Market B:** |  |  |  |  |  |  |  |
| **Product 2:** | **Current Forecast of Sales / Licensing Revenue:** |
|  |  |  |  |  |  |  |  |
|  | Identify and discuss any important changes in your product commercialization plans that have developed during the project and their possible impact on the rate and magnitude of revenues over the next 1-3 years:  |   |
|  |  |  |  |  |  |  |  |
|  | Explain the reasons for any major difference (if any) in forecasted revenue (both in timing and in magnitude) from the original forecast provided in the project proposal: |   |
|  |  |  |  |  |  |  |  |
|  | Discuss the difficulties/threats/uncertainties in marketing/sales that might be faced in the next 1-3 years that might influence the current revenue forecast: |   |
|  |  |  |  |  |  |  |  |
|  | Discuss any new downstream (1-3 years) product opportunities based on the technology developed in the project:  |   |
|  |  |  |  |  |  |  |  |
|  | Describe any further joint activities planned by the project partners: |   |

# 12. Summary of Relevant Markets Size and Growth Rate

Open the Excel file: **Final Technical Report Part II.xls** found on our website, and fill in the market size projections and the sales forecast of each of the products and market segments discussed above in the previous section. (Section 11 - Updated Market Forecast).

After concluding the projections and the forecast, copy the data found on the worksheet **Part II-Summary,** and fill in the table below accordingly. (You can copy and paste the whole worksheet).

 **Summary of Relevant Markets Size and Growth Rate**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Year Project Completed | Year 1 | Year 2 | Year 3 |
| Calendar year: | **-** | **-** | **-** | **-** |
|  |   |   |   |   |
| Market size (M$/yr): |   |   |   |   |
| Annual growth rate (%): | - | - | - | - |

**Summary of the Forecast of Sales / Licensing Revenue in the Project Proposal**(basis for repayments to BIRD)This table represents the same figures that were used in the project proposal

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Year Project Completed | Year 1 | Year 2 | Year 3 |
| Calendar year: | **-** | **-** | **-** | **-** |
| Annual revenue forecasted in Project Proposal (K$/Yr): |   |   |   |   |
| Cumulative revenue forecasted in project proposal (K$/yr): |   |   |   |   |

 **Summary of the Current Sales / Licensing Revenue Forecast**

This table represents the updated forecast that is expected following the project completion

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Year Project Completed | Year 1 | Year 2 | Year 3 |
| Calendar year: | **-** | **-** | **-** | **-** |
| Forecasted annual sales / licensing revenue (K$/yr): |  -  |  -  |  -  |  -  |
| Revenue basis for repayment to BIRD (% of revenue, as per CPFA):  | - | - | - | - |
| Forecasted annual repayment (K$/yr): |  -  |  -  |  -  |  -  |
| Cumulative forecasted repayment (K$/yr): |  -  |  -  |  -  |  -  |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Current annual revenue forecast, as % of proposal forecast: | - | - | - | - |

# Appendices (Use as needed)

# Appendix A - Project Summary Presentation

Following the submission of the final technical report, a joint conference call with the parties will be coordinated together with the BIRD representative to summarize the project.

The joint presentation presented by the parties should include the following information:

1. Project overview, accomplishments vs. objectives.
2. Project tasks and schedule.
3. Milestones and deliverables.
4. Project results and future planned work, jointly and/or separately.
5. Coordination and communication between the partners.
6. Road to commercialization - marketing & sales activities, plans for the future.
7. Sales forecast.