**Subsidies and Incentives for Taipei City**

**Proposal for R&D project**

**Thematic R&D** **Proposal**

|  |  |  |
| --- | --- | --- |
| □**Technology Development** | □ **Innovation Service** | □**Cultural Creativity & Content** |
| □Information Technology  □Chemical  □Mechanical  □Medical & Biotechnology  □ Others | □Business Model  □E-Commerce  □Service Model  □Others | □Digital Content  □Cultural Creativity  □Others |

Project Tittle：\_\_\_\_\_\_\_\_\_\_\_\_\_Thematic R&D Project

Project Period： YY/MM/DD to YY/MM/DD

(Total MM Month)

Company： (Company stamp)

Representative： (Representative stamp)

**Guideline of how to write the Proposal**

1. Please fill out the proposal as detail as possible and do not delete any columns.
2. Be aware of the reliability, validity and consistency of the statistical data and information quoted in the proposal. The statistical data used in the proposal should be noted with the original resource.
3. For the budget statement, please be aware that the unit is 1,000 NT dollars. Numbers should be rounded off to whole numbers.
4. For more information

**Subsidies & Incentives for Taipei Industry** **(SITI)**

[www.industry-incentive.taipei.gov.tw](http://www.industry-incentive.taipei.gov.tw).

**Department of Economic Development, Taipei City Government**

[www.doed.taipei.gov.tw](http://www.doed.taipei.gov.tw).

**Project information**

Unit：thousand NTD

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Project Tittle | |  | | | | Thematic R&D Project | | |
| Company | |  | | | | | | |
| Address | |  | | | | | | |
| Category | | Please choose one category from behind: | | | | | | |
| **□ Technology Development**  (□Information Technology □Chemical □Mechanical □Medical & Biotechnology □Others) | | | | | | |
| **□ Innovation Service**  (□Business Model □E-Commerce □Service Model □Others) | | | | | | |
| **□ Cultural Creativity & Content**  (□Digital Content □Cultural & Creativity □Others) | | | | | | |
| Project Period | | From YYYY/MM/DD to YYYY/MM/DD (Total \_ Month) | | | | | | |
| (limited to 8 ~ 18 month) | | | | | | |
| Project Director | | Name |  | | Title | |  | |
| TEL |  | | Cell phone | |  | |
| E-mail |  | | | | | |
| Project Contact | | Name |  | | Title | |  | |
| TEL |  | | Cell phone | |  | |
| E-mail |  | | | | | |
| Budget allocation | | Government Amount request | | Company Amount | | | | Total Project Amount |
| Year |  |  | |  | | | |  |
| Year |  |  | |  | | | |  |
| Percentage | | (%) | | (%) | | | | (%) |

|  |
| --- |
| **Project Summary** |
| 1. **Reasons of starting the project & the goals of it** (please describe the opportunities and the concept of your business, and the object you want to achieve in this project) |
| 1. **Developing Technology /Service /Product** (Describe the technology or service or product you will develop in this project, and the innovation about it.) |
| 1. **The key mission(milestone) of the project**   (Briefly describe the key mission and its’ action plan) |
| 1. **Project outcome**   (Describe the key performance indicators of this project, such as develop 1 newsystem/service/product, revenue, clients, sale channels…, etc.) |

※Notice:

\* We may publish this summary in relative websites of Taipei city government.

1. **Company information**
   1. **Basic Information**

|  |  |  |
| --- | --- | --- |
| Company VAT Number |  | |
| Company Name |  | |
| Business Address |  | |
| Capital Amount |  | |
| Representative |  | |
| Date of Incorporation |  | |
| Top 5 stockholder | Holding Shares | (%) |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
| Total |  |  |

* 1. **Operational and Financial status**

※Advice : Please describe your company’s financial status of past 3 years

Unit：1,000 NTD

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Main Product/Service | Year\_\_\_ | | | Year\_\_\_ | | | Year\_\_\_ | | |
| production | sales  amount | market share | production | sales  amount | market share | production | sales amount | market share |
|  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |
| Total |  |  |  |  |  |  |  |  |  |
| Annual |  | | |  | | |  | | |
| Annual R&D budget (B) |  | | |  | | |  | | |
| (B)/(A)% |  | | |  | | |  | | |

* 1. **Core Abilities and Experience**

※You can describe the core abilities (e.g. patent, award, research achievement.) or your team members of the company.

* 1. **Records of applying for other government R&D projects**

※If you had applied for other government projects (such as CITD, SBIR, SIIR), please provide the details.

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Year | Subsidy  Provider | Project tittle | Time frame | Annual Funding(1000 NTD dollars) | | | | | |
|  | |  | |  | |
| Gov.  amount | Total  amount | Gov.  amount | Total  amount | Gov.  amount | Total  amount |
|  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |

※Notice: Taipei city government may revoke the application or retrieve the subsidy if there is any concealment or falsification.

1. **Project Details and Implementation** 
   1. **Background and Competitiveness Analysis**
2. **Project Background**

※Describe why you came up with this project. What opportunities or possibilities did you found out?

1. **Competitiveness Analysis (Technology/Product/Service)**※You can analysis the difference of your technology/product/service between the same or similar ones in market with the following or other criteria(you may adjust the criteria by your needs.)

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Your company | Company A | Company B | Company C |
| 1. Price |  |  |  |  |
| 1. Product/Service Launch date(Date /Year) |  |  |  |  |
| 1. Market Share (%) |  |  |  |  |
| 1. Market Segmentation |  |  |  |  |
| 1. Marketing Channel |  |  |  |  |
| 1. Technology/Service advantages |  |  |  |  |

1. **Feasibility analysis**※You may use several indicators to describe the feasibility of the project, including but not limited to the market scale, business model, technology.

(next page)

* 1. **Project Objective**

1. **Product/Service indicators or specs**

|  |  |  |
| --- | --- | --- |
| **Indicators /Specs** | **Before (the project)** | **After (the project)** |
|  |  |  |
|  |  |  |
|  |  |  |

1. **Innovativeness**※Describe the innovativeness of your technology/service/product of the project.)
2. **Relevance to the theme**
3. **Key technology, Service, component, and their source**

(next page)

* 1. **Project Implementation**

1. **Target audience and Market**
2. **Commercialization Strategy**※It is necessary to commercialize your technology/service/ product in the project. If it’s not possible, you may promise to qualify to the Technology Verification Test or national/global regulations instead.   
   ※Describe your market access plan, business model, and estimated benefits
3. **Crucial Project Milestone**※ It must contains Commercialization Strategy or Technology Verification.
4. **Project Implementation**

|  |  |  |  |
| --- | --- | --- | --- |
| **Task** | | **Conductor** | **Implementation details** |
| **A** | **A1** |  |  |
| **A2** |  |  |
| **B** | **B1** |  |  |
| **B2** |  |  |
| **C** | **…** |  |  |
| **…** | **…** |  |  |

* 1. **Analysis of Intellectual Property**

※Describe if you possess the crucial patent or IP for this project, and if there’s any involvement of others’ patent or IP?

1. **KPI and Expected profits**
   1. **KPI (Key Performance Indicators)**

※Note：

1. You should provide quantitative indicators or any other measurement tools for each KPI, and KPI should be related to the project.
2. You should provide indicators for the commercialization strategy, such as obtain orders, revenue increasement, new products, new markets…etc.
3. Company should provide evidence or certification of each KPI and project outcomes. Applicant should set up quantitative indicators or any other measurement tools for each KPI. Each KPI should be weight by the importance in the whole project.
4. It is allowed to modify the KPI during the project. Nevertheless, the subsidy may be cut down if you still failed to reach the KPI. The subsidy will be cut down by the weight of the project.

| Task | Sub task | Time frame | KPI | Weight | |
| --- | --- | --- | --- | --- | --- |
| A | A-1 | YY/MM/DD ~YY/MM/DD |  | % | % |
| A-2 | YY/MM/DD ~YY/MM/DD |  | % |
| B | B-1 | YY/MM/DD ~YY/MM/DD |  | % | % |
| B-2 | YY/MM/DD ~YY/MM/DD |  | % |
| C | …. | YY/MM/DD ~YY/MM/DD |  | % | | |
| Total | | | | 100 % | | |
| **Social Contribution** | | YY/MM/DD ~YY/MM/DD |  | % | | |

* 1. **Expected Benefits and Social Contribution**

1. **Expected benefits of the project**※Please forecast company’s performance in 3 years(after the project is concluded). You can use different indicators(revenue, jobs, investment..etc.) for description.
2. **Social Contribution**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Category** | **Content** | **How many** | **Amount** | **Total Amount**  **(thousand NTD)** | **weight** | **Certification** |
| **Necessary** | **Paid internship for college students** |  | (wage per position/ thousand NTD) |  | **%** | (labor insurance, pay check…etc.) |
| **Optional** |  |  |  |  | **%** |  |

1. Social contribution should be relevant to this project.
2. The weight of Social Contribution should be less than 5%.(the amount of social contribution / project budget)
3. Social contribution will be examined in project closeout review.
4. **Project Team and Budget**
   1. **Profile of Project Member**
5. **Profile Project director**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Name |  | | Gender | □ Male □ Other  □ Female | |
| ID Number |  | | Birth date |  | |
| Company Name |  | | Title |  | |
| Address(O) |  | | Tel. |  | |
| Address(H) |  | | | | |
| Industry Field |  | Work Experience | Year(s) | In-service seniority | Year(s) |
| Achievement |  | | | | |
| Education | School  (college~) | Duration | Degree | | Department |
|  | YY/MM |  | |  |
|  |  |  | |  |
| Experience | Company | Duration | Department | | Title |
|  | YY/MM |  | |  |
|  |  |  | |  |
|  |  |  | |  |
| Participated Project | Project | Duration | Company | | Main object |
|  | YY/MM |  | |  |
|  |  |  | |  |
|  |  |  | |  |

1. **Profile of Team Member**

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| No. | Name | Title | Education | Experience | Achievement | In-service seniority | Main Assignment  of the project | Participation  (month) |
| 1 |  |  |  |  |  |  |  |  |
| 2 |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |

※

1. The main assignment should be consistent to the schedule, and project members, personnel expense and participation should be consistent to the budget statement.
2. Everyone who participate the project should be listed in this form.
3. **Outsourced company profile**

|  |  |  |
| --- | --- | --- |
| Company |  | |
| 1. **Why is it necessary to cooperate with the sub contractor(s)?** | | |
| 1. **Generally describe the performance or experience of the** **sub contractor(s)** | | |
| 1. **Has the outsourcingor(s) accepted any kinds of government subsidy?** | | |
| If you or your company and the subcontractor(s) are related parties? | | □No □Yes |

* Please refer to the Enterprise Accounting Standard(企業會計準則) for the detail definition of Related Party Disclosures.
  1. **Budget Statement**

Unit：thousands NTD

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Option** | | **Government Amount request** | **Company Amount** | **Total** | **%** |
| 1. Personnel Expense | 1. Researchers |  |  |  |  |
| 1. Consultant |  |  |  |  |
| **Sub total** |  |  |  |  |
| 1. Consumption equipment & Materials | |  |  |  |  |
| 1. Usage of R&D equipment | |  |  |  |  |
| 1. Maintenance cost of R&D equipment | |  |  |  |  |
| 1. Outsourcing Expense | 1. Purchase of Technology or IP |  |  |  |  |
| 1. Research |  |  |  |  |
| 1. Service |  |  |  |  |
| 1. Design |  |  |  |  |
| **sub total** |  |  |  | **\*** |
| 1. Patent application cost | |  |  |  |  |
| **Total** | |  |  |  |  |
| **Rate (%)** | |  |  |  |  |

1. For detail information of each Option, please refer to“臺北市產業發展研發補助計畫 會計科目編列原則及查核準則”. (only in Chinese)
2. The subcontract cost should be less or equal to 50% of the total project funds.
3. Government funds should be less than or equal to Non- Government funds in every options.
4. **Personnel cost**

|  |  |  |  |
| --- | --- | --- | --- |
| Unit：1,000 NTD | | | |
| Tittle | Average salary  (A) | Man-month  (B) | Total Amount  (A)\*(B) |
| (1) Researchers (Name/Tittle) | | | |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
| sub total | |  |  |
| (2) Consultant / Specialist | | | |
|  |  |  |  |
|  |  |  |  |
| sub total | |  |  |
| Total | | |  |

※ Note:

1. Employee who is listed in the personnel cost should be covered in the Labor Insurance or Employment Insurance. Hiring retired people should provide Occupational Injury and Disease Insurance.
2. Applying for Consultant or Specialist expense, it is necessary to provide MOU / contract. (If consultant is hired by other company, it is also necessary to provide agreement letter from that company).
3. Consultant cannot be the employee or representative of your subcontractor.
4. **Consumption equipment & Material**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Unit：thousand NTD | | | | |
| **Item** | **Unit** | **Qty** | **Unit-price** | **Total Amount** |
|  |  |  |  |  |
|  |  |  |  |  |
| **Total** | | | |  |
|  | | | | |

1. **Usage of R&D equipment**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Unit：thousand NTD | | | | | |
| **Equipment**  (Asset Number needed) | **Book Value**  **per unit**  (A) | **Amount**  (B) | **Usage per month**  (c)  AxB/(remaining useful life \*12) | **Use of  Month**  (D) | **Total**  (CxD) |
| **Existing Equipment** | | | | | |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
| **sub total** | | | | |  |
| **Expected purchase Equipment** | | | | | |
| **Equipment**  (Asset Number needed) | **Book Value**  **per unit**  (A) | **Amount**  (B) | **Usage per month**  (c)  AxB/(remaining useful life \*12) | **Use of  Month**  (D) | **Total**  (CxD) |
| 1. |  |  |  |  |  |
| 2. |  |  |  |  |  |
| **sub total** | | | | |  |
| **Total** | | | | |  |

※Note:

1. Transactional equipment, such as PC/Lap top, printer, locker etc. is not categorized as R&D equipment.
2. The asset number of equipment should be consistent to the company’s inventory. Also, the book value and remaining useful life of existing equipment should be consistent to company’s inventory.
3. **Maintenance expense of R&D equipment**

|  |  |  |  |
| --- | --- | --- | --- |
| **Unit：thousand NTD** | | | |
| **Equipment**  (Asset Number needed) | **Book Value**  **per unit** | **Amount** | Total |
|  |  |  |  |
|  |  |  |  |
| **Total** | | |  |

※Note: Transactional equipment is not categorized as R&D equipment. Newly purchased (within 1 year) equipment cannot apply for maintenance expense. Furthermore, maintenance expense must be lower than 20% of the purchase cost.

1. **Outsourcing cost**

|  |  |  |  |
| --- | --- | --- | --- |
|  | **Unit：thousand NTD** | | |
| **Options** | **Company** | **Content** | **Amount**  **(tax excluded)** |
| (1) Purchase of Technology Transfer & IP |  |  |  |
| (2) R&D |  |  |  |
| (3) Service |  |  |  |
| (4) Design |  |  |  |
| **Total** | |  |  |

※Note:

1. Outsourcing cost should be less than equal to 50% of the total project funds.
2. Outsourcing cost cannot be used as mass production.
3. Outsourced company should be legal entity.
4. Apply for Outsourcing Expense should provide MOU, Quotation, or contracts with the outsourcing partners.
5. **Patent Application Expense**

|  |  |  |  |
| --- | --- | --- | --- |
| **Unit：thousand NTD** | | | |
| Applied Country | Applied date | Patentee  (= applicant) | Cost  (tax excluded) |
|  |  |  |  |
|  |  |  |  |
| **Total** | | |  |

1. **Appendix**
   1. List for the Avoidance of Judges
   2. Comparison table of previous and current project
   3. Description chart for Succession project of subsidized project.

**Appendix**

**List for the avoidance of Judges**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Current Position | Tittle | Specific Reasons or facts |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

※Note: Please provide specific reasons (e.g. interest conflict) for the avoidance of judges. Company stamp and representative stamp is required.

Company Stamp：

Representative Stamp：

**Appendix**

**Comparison table of previous and current project**

Description of the reason why company did not got the subsidy last time (including case being rejected, Not recommend, and company withdraw the case).

|  |  |
| --- | --- |
| **The reason why company did not got the subsidy last time** | **description of the improvement measures** |
| □Rejected： | (please describe why company is qualified now) |
| □Withdraw： |
| □not qualified： |

Differences of the current application from the prior application (including case rejected & approved)

|  |  |  |
| --- | --- | --- |
|  | **Previous project** | **New project** |
| **project**  **tittle** |  |  |
| **Description** |  |  |

**Appendix**

**Description chart for Succession project of subsidized project**

(for the succession project of the currently subsidized project of Taipei city government)

|  |  |  |
| --- | --- | --- |
|  | **Project on going** | **New succession project** |
| **Project tittle** |  |  |
| **Technology/ service/product** |  |  |
| **Achievement** |  |  |
| **Subsidy applied**  **(want to apply)** |  |  |
| **What makes the new project a successive project?** |  | |