PTAC

Alberta Upstream Petroleum Research Fund

PTAC

26-WDRC-RFP-04

INTEGRATED SCVF/GM REMEDIATION SUCCESS AND VERIFICATION

BUDGET: $125,000

PUBLICATION DATE: MARCH 19, 2026

PROPOSAL SUBMISSION DEADLINE: MAY 8, 2026 BY 5:00 PM

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1. Background & Rationale

Surface casing vent flow (SCVF) and gas migration (GM) remain persistent well integrity and decommissioning challenges. The Alberta Upstream Petroleum Research Fund (AUPRF) has identified a combined need to improve SCVF/GM repair success metrics, evaluate cement and cement-alternative barriers (including bond quality behind pipe), and develop post-treatment as well as longer-term monitoring/management solutions (including quantitative measurement).

This RFP is intentionally distinct from the companion 'Source and Leak Pathway Identification (Diagnostics Suite)' effort. That project's diagnostics suite is focused on diagnosing the problem—standardizing workflows and tool selection to produce confidence-rated conclusions about SCVF/GM origin/source, storage zones, and leak pathways (including multi-annular cases), so teams can plan the most appropriate intervention based on defensible pathway attribution.

In contrast, this 'Integrated SCVF/GM Remediation project is focused on proving and sustaining the fix—defining repair success metrics, evaluating cement and cement-alternative barriers (including bond quality behind pipe), and establishing post-treatment verification plus longer-term monitoring/management with quantitative measurement so outcomes can be measured, verified over time, and used for learning and improved closure confidence.

For this RFP, proponents must explicitly align all success metrics, verification protocols, and monitoring recommendations with current AER requirements for SCVF and GM classification, testing, and reporting, including (at minimum) the definitions and thresholds for:

- SCVF classification (e.g., serious, considered nonserious, nonserious) and GM classification (serious, nonserious),
- "stabilized average gas flow" and "stabilized shut-in pressure" concepts and how stabilization is demonstrated,
- required follow-up testing expectations for nonserious/considered nonserious SCVF/GM cases, and
- record retention and evidence requirements sufficient to support auditability and regulatory review.

Where proponents recommend metrics or verification methods that differ from AER minimums, the suite must (a) clearly identify the difference, (b) justify why the approach remains defensible, and (c) provide a mapping back to AER-compliant reporting and decision outcomes.

Across these needs, the combined problem is that industry lacks an integrated, evidence-based approach that links barrier selection and treatment design to measurable success metrics and verification over time. This limits learning across wells and reduces confidence in closure outcomes, particularly when performance is assessed as a simple 'worked/didn't work' outcome without disaggregating material, placement, procedure/QC, and monitoring evidence.

The suite developed under this RFP must support Alberta regulatory expectations for SCVF/GM testing, classification, reporting, repair/deferral decisions, and record retention (including AER Directive 087 and related requirements in AER Directive 020). Proponents should also identify where the approach maps cleanly to other Canadian jurisdictions (e.g., BC/SK) and where material differences matter.

Proponents must identify how the suite aligns with relevant Industry Recommended Practices (IRP) for wellbore remediation and decommissioning (e.g., IRP 26 and IRP 27) and where the suite provides additional specificity (e.g., quantitative acceptance criteria, stabilized trend definitions, evidence pack standards).

2. Benefits to Producers

This project is intended to deliver practical, defensible tools that producers can use to improve repair outcomes and reduce rework by connecting (a) barrier selection and treatment design to (b) measurable success criteria and (c) verification and monitoring over time. Expected benefits include:

- Higher first-attempt repair success probability through explicit linkage of design choices (products/placement/procedure) to measurable acceptance criteria.
- Reduced diagnostic/rework loops by standardizing success metrics, evidence capture, and verification planning.
- Improved auditability and knowledge transfer through structured evidence packs that trace rationale → execution → measured outcomes.
- More defensible monitoring/management decisions for non-serious SCVF/GM cases through cost-effective quantitative measurement approaches.

3. Research Objectives

Proponents must deliver an integrated 'Remediation Success & Verification Suite' consisting of processes, evaluation methods, and tools (which may include software, templates, protocols, and/or field-ready workflows) that accomplish the following objectives:

- A detailed workplan with clear milestones, dates when deliverables are provided and timelines for completion.
- Define a structured set of SCVF and GM repair success metrics that are operationally measurable, time-staged (immediate post-treatment, short-term confirmation, longer-term performance), and auditable.
- Link barrier selection and treatment design (including placement/access and procedure/QC) to expected outcomes and the verification evidence required to confirm those outcomes.

- Provide an evaluation approach for cement and cement-alternative barriers, including methods to assess bond quality behind pipe and to document uncertainty.
- Define post-treatment verification protocols and longer-term monitoring/management options that include quantitative measurement. These monitoring options shall be pragmatic and cost-effective approaches acceptable to oil and gas producers.
- Deliver evidence pack templates, data standards, and minimum QA/QC expectations that enable comparative learning across wells and projects.
- Produce a Directive-anchored "Classification-to-Acceptance" bridge: a decision-ready mapping that connects SCVF/GM classification outcomes to (a) minimum required evidence, (b) staged verification timing, (c) acceptance criteria, and (d) escalation/reclassification triggers.

4. In Scope

This RFP seeks practical, auditable outputs that prove and sustain SCVF/GM repair outcomes, including measurable success metrics, verification/QA-QC protocols, and long-term monitoring/management guidance aligned to Alberta requirements. Submissions that do not clearly deliver these implementable tools (e.g., proposals focused mainly on high-level reviews, generalized discussions, or unrelated technology development) may be deemed non-responsive.

- Integrated remediation success workflow: an end-to-end workflow linking design intent → execution → staged verification → learning outputs. Workflows must include a consideration of managing non-serious SCVF/GM situations before decommissioning.
- Repair success metrics catalogue + acceptance criteria: definitions, measurement methods, and QA/QC requirements for SCVF and GM outcomes.
- Barrier selection + treatment design guide: decision logic linking conditions and objectives to barrier classes and treatment approaches, including placement/access and procedure/QC considerations.
- Cement/cement-alternative evaluation: performance-relevant properties and behind-pipe bond evidence guidance, with applicability limits and uncertainty handling.
- Post-treatment verification: field-ready protocols specifying stabilization, repeatability controls, logging cadence, calibration expectations, and evidence capture.
- Minimum Measurement and QA/QC Specification (Required)
  - The suite must include a minimum measurement specification for SCVF and GM verification that addresses:
    - Measurement objectives (detection vs quantification vs trend confirmation),
    - Minimum instrument performance and documentation (resolution, range, calibration evidence, environmental constraints),

    - Standardized test conditions (valve positions, vent configuration, stabilization period, ambient controls),
    - Repeatability controls (replicate tests, time-of-day/temperature effects, operator steps, documented deviations),
    - Data capture requirements (raw time-series where applicable, metadata, chain of custody),
    - Treatment/verification “hold points” and acceptance criteria linked to classification and risk,
    - Uncertainty documentation and how uncertainty influences acceptance decisions.

- The suite must provide staged verification timing guidance that explicitly includes:
    - Immediate post-treatment checks (same-day and/or within 24–48 hours, as appropriate to the method),
    - Short-term confirmation checks aligned to stabilization demonstration and repeatability controls,
    - Longer-term confirmation guidance aligned to nonserious/considered nonserious follow-up expectations (multi-year trend confirmation),
    - Clear criteria for when stabilization is considered achieved and how trend stability/decline is demonstrated,
    - Triggers for escalation, re-testing, reclassification, or additional remedial action.

- The suite must include a practical screening method to identify receptors and hazards that affect classification, verification intensity, and acceptance criteria (e.g., proximity to domestic/agricultural water wells, off-lease impacts, and public safety/environmental hazards). The screening output must link directly to verification/monitoring escalation and documentation requirements.

5. Out of Scope

- Performing physical well repairs, abandonment operations, or construction work as a primary activity (unless proposed as a limited demonstration strictly to support deliverables).
- Purely theoretical reviews that do not produce implementable workflows, templates, and measurable acceptance criteria.

6. Specific Deliverables

- Remediation Success & Verification Suite Framework (core deliverable).
- Repair Success Metrics Catalogue + Acceptance Criteria.
- Barrier Selection & Treatment Design Guide.
- Behind-Pipe Barrier/Bond Evidence Guidance.
- Post-Treatment Verification Protocols.
- Long-Term Monitoring & Management Options Playbook.
- Case Study Package (demonstration of use).
- Validation Plan and Acceptance Criteria.
- Final Report + Producer-Facing Summary.

7. Success Criteria

- Produces actionable outputs that connect remediation design choices to measurable success metrics and verification plans.
- Improves transparency and learning via auditable evidence packs, tracing evidence → interpretation → conclusion.
- Addresses barrier performance and behind-pipe bond evidence with clear minimum evidence standards.
- Enables quantitative monitoring/verification with repeatability controls, calibration documentation, and raw-data retention.
- Is reproducible and scalable across teams, well types, and operating contexts.

PTAC

Alberta Upstream Petroleum
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AUPRF 2026
Request for Proposals

INSTRUCTIONS FOR PROPOSAL SUBMISSIONS

MARCH 2026

www.ptac.org
Suite 1550,
520 Fifth Avenue SW
Calgary, AB. T2P 3R7

Instructions for Proposal Submissions
AUPRF 2026 RFPs

1 Purpose & Scope

These instructions apply to all competitive solicitations funded by the Alberta Upstream Petroleum Research Fund (AUPRF) and administered by PTAC Petroleum Technology Alliance Canada. They define how Proponents must prepare and submit proposals, how proposals are evaluated, the timelines for decisions and notifications, and key commercial and legal terms applicable to AUPRF-funded projects.

2 Submission – Content Requirements

2.1 Proponent & Company Information

- Legal name and address
- Primary contact name, title, email, and phone
- Brief company overview and relevant services

2.2 Technical Proposal

- Understanding of the problem statement and scope
- Proposed methodology and approach
- Work plan, milestones, and schedule
- Team composition; max 2-page bios/CVs with roles and expertise

2.3 Financial Proposal

- Itemized cost breakdown (e.g., labour categories and rates, materials, travel, subcontractors)
- Proposed milestone-based payment schedule (payments tied to deliverables)
- Leveraged funding

2.4 Formatting and Page Limits

Unless otherwise specified in a particular RFP, no strict page limits apply; include the content necessary to enable a thorough assessment.

3 Submission — Method & Logistics

Submit by email to info@ptac.org with subject line: *AUPRF – RFP ID – Proponent Company Name*. **Proposals submitted by other means will not be accepted.**

- Deadline: Proposals must be received on or before the RFP deadline indicated in each RFP document; late submissions will not be considered.

- File format: A single combined PDF is preferred, plus any required spreadsheets or forms specified in the RFP.
- Validity: Proposals must remain irrevocable and open for acceptance for 90 days from the submission deadline.
- Questions & FAQs: Refer to the AUPRF call for proposals landing page and any RFP-specific instructions for updates and clarifications.

4 Eligibility, Legal & Commercial Terms

- PTAC reserves the right to accept or reject any Proposal, in whole or in part, and to cancel or amend an RFP without liability.
- Proponents are responsible for all costs associated with preparing and submitting their Proposals.
- Confidentiality applies to information provided by PTAC; Proponents may be required to sign a non-disclosure agreement. Proposals will be kept confidential and will be accessed only by evaluators.
- Intellectual property (IP) arising from AUPRF projects may be owned by AUPRF funders, or AUPRF funders receive a royalty-free operational use right. No other IP ownership or sharing options (if IP is being generated) are acceptable.
- Minimum insurance: Commercial General Liability (CGL) of $5,000,000 and Professional Liability of $2,000,000.
- Disclosure of intent to subcontract and any actual or potential conflicts of interest is required.
- Governing law: Province of Alberta, Canada.

5 Evaluation Criteria & Process

5.1 Scored Criteria and Weights

Criterion	*Weight*
Technical Approach	30%
Relevant Experience	30%
Cost	25%
Leveraged Funds from Other funders	5%
Team Qualifications	10%

5.2 Screening & Completeness

Proposals are first screened for completeness and compliance (deadline, required sections, and required disclosures). Incomplete or non-compliant Proposals may be removed from further consideration at PTAC's discretion.

5.3 Committee Review, Scoring & Deliberation

The relevant AUPRF technical committee reviews Eligible Proposals. Committee members score Proposals using the standardized scoring sheet before a deliberation meeting, where compiled results are discussed, and recommendations are confirmed.

PTAC may request clarifications, additional information, or presentations from Proponents to support evaluation before final ranking.

6 AUPRF Review & Communication Timelines[1]

The following service levels apply to all **AUPRF RFPs for Well Decommissioning Research Projects (WDRC) and Water Innovation Planning Committee (WIPC)** unless a specific RFP states a different schedule:

Step	*Date*
1. **RFP Release** - **Well Decommissioning Research (WDRC)** - **Water Innovation Planning (WIPC)**	March 19, 2026
2. **Submission of Questions**	April 10, 2026
3. **Answers to Questions Posted** on PTAC Website	April 24, 2026
4. **Proposal submission deadline**	**May 8, 2026** **5 pm Mountain Time**
5. **Acknowledgement of receipt**	May 22, 2026
6. **Decision ratification**	June 19, 2026 or sooner
7. **Award notifications**	June 26 – July 7, 2026
8. **Target project start**	Summer 2026 (unless otherwise specified)

7 Communication

- All communications by the proponent to PTAC should be directed to **info@ptac.org** and AUPRF2026 RFPs should be included in the subject line.
- PTAC will notify the Proposal's primary contact by email of the outcome (award or non-award).
- Unsuccessful Proponents may request high-level feedback on strengths and areas for improvement.
- Public Communications: PTAC/AUPRF may publish award highlights after contract execution.

[1] AUPRF 2026 RFPs for Ecological Research Planning Committee (ERPC), Air Research Planning Committee (ARPC), and Reclamation Remediation Research Committee (RRRC) will follow a different timeline and deadline.

8 Contracting, Payments & Reporting

- A standard AUPRF Funding Agreement will be issued to successful Proponents for review and execution.
- Payments are quarterly milestone-based and tied to accepted deliverables, as specified in the Funding Agreement.
- Executed agreements are retained in the AUPRF contracts repository managed by PTAC.

9 Compliance & Reserved Rights

PTAC may amend or cancel an AUPRF RFP at any time; any changes will be communicated to all prospective Proponents. Proponents must comply with all instructions, including confidentiality, insurance, subcontracting disclosures, and conflict-of-interest requirements.

10 Proponent Checklist

- Company information (legal name, address, contacts, overview)
- Technical proposal (approach, work plan, schedule, team bios/CVs)
- Financials (itemized costs; milestone-based payment plan, leveraged funding)
- Disclosures (subcontracting intent; conflicts of interest)
- Insurance confirmation (CGL $5M; Professional Liability $2M)
- Submission format (single PDF + required forms); deadline; 90-day validity

11 Legal Conditions

11.1 Non-Binding Solicitation; No Obligation to Award

This Request for Proposals (RFP) is not an offer to contract. No contractual, quasi-contractual, fiduciary, or other legal obligations of any kind are created by this RFP or by any submission, communication, or conduct of PTAC unless and until a written Funding Agreement is executed by duly authorized representatives of PTAC and the successful Proponent. PTAC may cancel, amend, or suspend this RFP at any time without liability.

11.2 PTAC's Reserved Rights

Without limiting any other rights, PTAC may, in its sole discretion and without liability: (a) accept or reject any or all Proposals; (b) accept a Proposal in whole or in part; (c) waive non-material irregularities; (d) seek clarifications; (e) negotiate changes to scope, schedule, and pricing with one or more Proponents; and (f) cancel this RFP at any time. The lowest-priced Proposal will not necessarily be selected.

11.3 No Claim for Compensation; Bid Costs

Each Proponent is solely responsible for all costs associated with preparing and submitting its Proposal, as well as any related activities. PTAC shall not be liable for any such costs or damages, whether or not the Proponent is selected for award.

11.4 Limitation of Liability

To the maximum extent permitted by law, PTAC shall not be liable to any Proponent for indirect, incidental, consequential, special, punitive, or exemplary damages, loss of profit, loss of opportunity, or loss of reputation arising out of or related to this RFP, the evaluation process, or any decision to award or not award funding, even if advised of the possibility of such damages. Any direct liability of PTAC to a Proponent is strictly limited to the reasonable, proven out-of-pocket costs of preparing the Proposal, which the parties agree is disclaimed by Section 4.

11.5 Verification and Clarifications

PTAC may request clarifications, additional information, or presentations from any Proponent and may verify any information contained in a Proposal through interviews, reference checks, third-party sources, or site visits. Failure to respond promptly may result in disqualification.

11.6 Grounds for Disqualification

PTAC may, at any time, disqualify a Proposal or rescind a selection if: (a) the Proposal is late, incomplete, or non-compliant; (b) the Proponent fails to disclose or address an actual or potential conflict of interest; (c) the Proposal contains misrepresentations or misleading information; (d) the Proponent engages in collusion, unfair competition, improper influence, lobbying outside the authorized contact, or attempts to obtain confidential information not publicly available; or (e) adverse information materially affecting the Proponent's qualifications comes to PTAC's attention.

11.7 Proponent Representations & Warranties

By submitting a Proposal, the Proponent represents and warrants that: (a) the Proposal is accurate, complete, and not misleading; (b) all proposed work product will not infringe intellectual property or other rights of third parties; (c) the Proponent and proposed subcontractors are duly qualified and in good standing; and (d) it will maintain the insurance required by the RFP and Funding Agreement.

11.8 Confidentiality; Use and Disclosure

Information provided by PTAC in connection with this RFP is confidential and may be used solely for Proposal preparation and evaluation. Proponents must not disclose such information to any third party except their team members, advisors, or subcontractors who have a need to know and are bound by confidentiality obligations no less protective. PTAC may disclose Proposals to its funders, technical committees, advisors, and partners for evaluation and administration and may make disclosures as required by law or court/government order.

11.9 Intellectual Property & License to Use

Subject to the Funding Agreement, IP arising from the Project may be owned by AUPRF funders, or funders will receive a perpetual, royalty-free right to use the IP in their operations without additional compensation. Proponents must ensure they have all the rights necessary to grant such

ownership or licenses. If IP is generated by the proposal/project, no other IP ownership or sharing options are acceptable. If IP is not generated by this project, this provision is unnecessary.

11.10 Subcontracting

The Proponent must disclose its intent to subcontract any portion of the work. PTAC reserves the right to approve or reject proposed subcontractors. The Proponent remains fully responsible for all subcontracted work.

11.11 Proposal Validity

Proposals must remain irrevocable and open for acceptance for 90 days after the submission deadline.

11.12 Acceptance Not a Waiver

PTAC's acceptance of a Proposal, or its failure to identify deficiencies, does not waive any requirement of the RFP or Funding Agreement and does not relieve the Proponent from responsibility for compliance or performance.

11.13 Order of Precedence; Entire Agreement

In case of conflict, the following order of precedence applies: (1) the executed Funding Agreement (including schedules), (2) the specific RFP (including addenda), (3) these Proponent Instructions, and (4) the Proposal. The executed Funding Agreement constitutes the entire agreement for project performance.

11.14 Governing Law and Forum

This RFP and any related dispute are governed by the laws of the Province of Alberta and the federal laws of Canada applicable therein, without regard to conflict-of-laws rules. The parties attorn to the exclusive jurisdiction of the courts of Alberta, sitting in Calgary.

11.15 Insurance & Indemnities

At a minimum, the Proponent shall maintain CGL of $5,000,000 and Professional Liability of $2,000,000, as well as any other insurance required by the Funding Agreement. Proponents will indemnify and hold harmless PTAC, its officers, directors, employees, and agents from third-party claims arising out of the Proponent's acts or omissions in connection with the Proposal or the Project, subject to the Funding Agreement.

11.16 Addenda and Questions

Only written addenda issued by PTAC form part of the RFP. Proponents are responsible for monitoring the RFP communication channel (the PTAC website) and ensuring their Proposal reflects all addenda.