

Guidance for Applicants

HOW TO COMPLETE AN APPLICATION FOR SUPPORT OF

RESEARCH / TECHNOLOGY DEVELOPMENT / TRIALS

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Abstract: These notes are for use as an aide to the completion of the ITF Application Form for submission of proposals for funding for research, technology development, and trials projects in the oil and gas sector.

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IMPORTANT NOTICE

You should read this document carefully and take note of the advice given.

These notes are intended to provide guidance on completing an ITF Application for research / technology development / trials proposals.

Generally completion of an application will be as a result of an ITF 'Call for Proposals', but if it is of a more 'Ad Hoc' nature then you should contact us before making your application so that we can discuss your proposal.

1 INTRODUCTION

1.1 Background to ITF

The Industry Technology Facilitator (ITF) was established in 1999 by the Oil and Gas Industry. It is a **not for profit** global organisation owned by operating companies and service companies (see full membership details on our website www.oil-itf.com). ITF's key objectives are to identify technology needs, foster innovation and facilitate the development and implementation of new technologies into the oilfield by the following means.

- Identify the shared technology needs of our member companies
- Seek out innovative solutions
- Access the technology development funds
- Launch collaborative joint industry projects
- Create field trial opportunities
- Deliver technology implementation

ITF staff are focused on adding value through a partnership interaction with operator members to understand their business driven technology needs. Thereafter ITF adopts a systematic process to seek out technology solutions and innovations to meet its members' business-driven technology needs and carries these forward through development of joint industry projects (JIPs), field trials and ultimately, implementation.

1.2 General

You have been invited through a Call for Proposals, or on an ad hoc basis, to submit an application for support to the ITF. The application form is designed to capture valuable information regarding your project, its specific benefits for the participants, and your ability to execute your proposal. It asks you to detail out a proposal that will then be taken to ITF member companies for evaluation. The quality of information you include in this form may influence the outcome of your application, and it is therefore important that you try to include as much information, in the most concise and easily understood manner possible, such that you have the best chance of attracting interest. We encourage you to include graphics that will add interest and tempt the reader to take the time to study your submission in more detail.

The following sections take you through the Application Form and are intended to give you guidance on what you should and should not include in the application.

If you have any difficulty in completing any part of the application then please get in touch with us and we will be able to help you.

1.3 Confidentiality

ITF has contractual arrangements on confidentiality with **ALL** our members (operators and service companies – see full membership details on our website www.oil-itf.com). By submitting a proposal to ITF you are agreeing for your proposals to be submitted to **ALL** our members for the purpose for which they are provided, i.e. assessment for funding and implementation.

Similar confidentiality arrangements are put in place between ITF and the Researcher to ensure the same obligation. Prior to, or shortly after your application being submitted

we will make arrangements for a Confidentiality Agreement to be put in place. You can view this agreement by downloading it from our website.

Apart from certain public domain summary information requested on the form all information will remain confidential at all times, and if your project is successful further contractual obligations are entered into which cover confidentiality between all parties.

1.4 How to Apply

Generally applications will be in response to an ITF Call for Proposal. The Call for Proposal will have been developed in collaboration with our members and highlights their specific needs. In order to receive information on current and future Calls for Proposals you should register with ITF via the website, www.oil-itf.com

Nevertheless, you can contact us at anytime with any innovation that you feel would be of benefit to ITF members. In this instance we suggest that you contact us and talk with one of our Technology Managers and/or Technology Analysts to discuss your idea. Contact details are given below, or you can find these on our website, www.oil-itf.com

You can submit your application to us electronically as directed in the specific Call for Proposal.

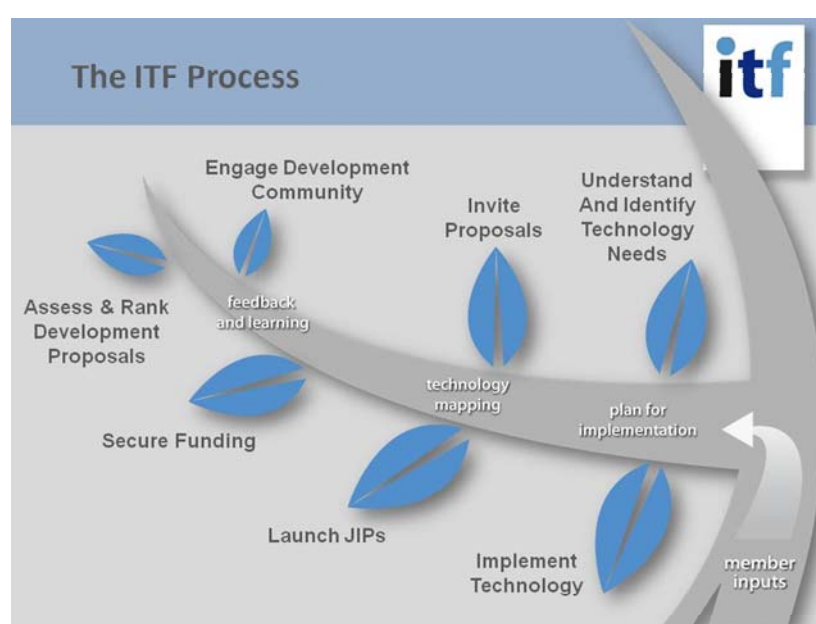
For any general queries and to seek further information then please contact the Call manager/analyst (as indicated on the specific call documentation), or contact our office as follows:

- **Speak with us on** +44 (0) 1224 853400
- **Email us at** info@oil-itf.com
- **Look on our website** www.oil-itf.com

2 THE PROCESS

2.1 Summary Process

The ITF process begins with ITF members providing an input on a confidential basis through one-to-one discussion. This information is collated by ITF and presented in a non-attributable way to the entire membership at our annual general meeting. The membership of ITF decides the working priorities for the year ahead; these are the ITF 'Themes'.



The formal timeline for the ITF process begins with a 'Theme Day', which takes the form of an open facilitated workshop where ITF members along with key industry experts engage to drill down into issues surrounding a theme and identify the key issues and challenges that the industry faces. ITF takes the output from the Theme Day and turns it into a Call for Proposal; this Call is issued to a wide audience within the global development community. This community is considered to exist amongst universities, research organisations, small and large companies; in short, anyone with a potential solution.

On receipt of proposal ITF will undertake a screening of proposals to see if they fit the specific requirements of a theme and the other criteria as is defined. The proposals will be categorised into two tiers and submitted to our members for their evaluation along with ITF recommendations. The basic difference between the two tiers being that the first tier will fit all requirements and criteria and the second will have some discrepancies. This tiered screening does not necessarily mean that your proposal has been rejected at this stage.

The process of review by our members incorporates a scorecard system which is reviewed in a closed meeting of members and from where a shortlist for potential

support in drawn up. There may be points of clarification requested at this stage. Following on, the proposal of key interest to our members will be invited to present their projects and finally clarify any remaining queries.

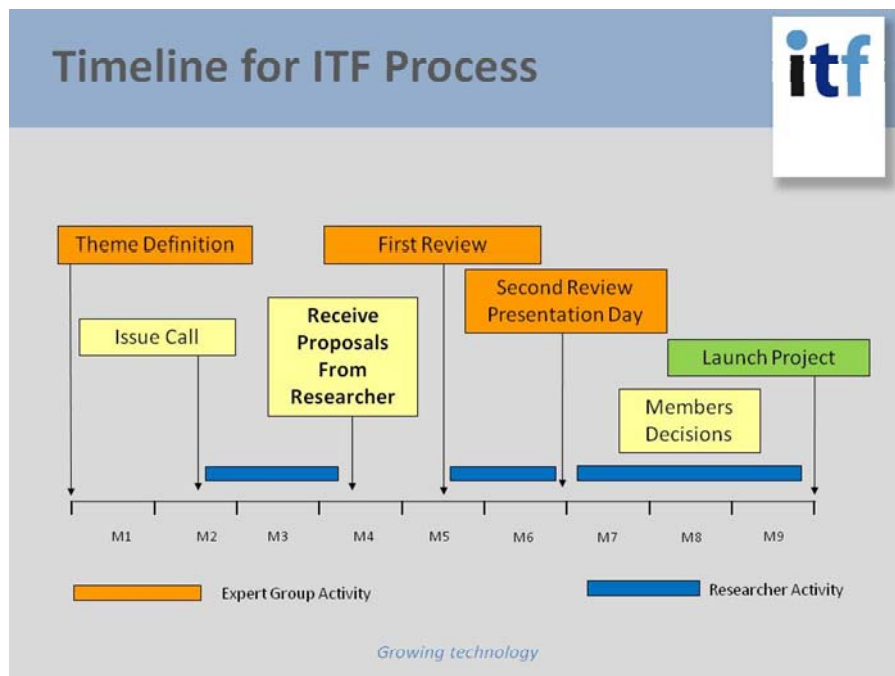
It is at these latter stages where some applicants may be asked to be flexible in their approach and modify proposals in either scope, cost, or time in order to give them a better chance of securing funding.

The final step is securing funding from ITF members to the point where sufficient support is attained to allow the project to proceed. A standard contract is then engaged for the successful applicants to establish the final Joint Industry Project. The contract will be between the researcher and the sponsors, ITF is not party to the contract but is entitled to remain in touch with the project and attend steering group meetings throughout the life of the project.

The ultimate objective of the exercise for all is to see the technology developed and be brought to full implementation through deployment. Implementation is a key performance objective for ITF and its members.

2.2 Timeline of the Process

The ITF timeline begins at the Theme Day and ends with launch of the project; this is expected to take nine months. However, the researcher will submit proposal along this timeline and we expect to be able to provide some indication of the level of interest with 10-12 weeks and begin contract negotiations with the successful applications shortly thereafter.



3 FUNDING

3.1 Sources of Funding

As a general rule, funding of projects will come from the ITF members. There may be additional funding made available through other funding bodies that are willing to participate in establishing the project, this could include government agencies, non-members of ITF, and other funding bodies.

3.2 Levels of Funding

There are no specific set rules on the level of funding offered by ITF members; potentially up to 100% of project costs are available. Where government and other bodies may be involved in jointly funding the project there may be rules to adhere to which will be defined by those agencies. Nevertheless, as with any investment a more favourable response may be given to those applicants who are prepared to contribute a share of the project costs with their own financial resource.

3.3 Who is eligible?

Any organisation can submit a proposal for funding; this can be a company, university or other academic institute, research institutes, a consortium, or an individual. Although in the latter case sufficient evidence must be provided on the ability to execute the project.

There are no restrictions on size of organisation, small or large companies can equally apply for support.

3.4 Which technologies are eligible?

Fundamentally the overriding premise for all applications is that they must meet an industry accepted need. This need will be defined through the ITF Call for Proposals or, in the case of 'Ad Hoc' proposals will be clearly defined by market research or endorsed by a technology end user.

ITF focuses on technologies that are of use to the oil and gas industry; predominantly, but not exclusively, to the upstream sector.

Technologies from other industry sectors are welcome where they may be developed for use and benefit of our members.

3.5 What costs are eligible?

All costs properly incurred and defrayed on the project including labour, overheads, materials, consultancy fees, sub-contract charges, fees for trials and testing, intellectual property costs, the net costs of capital equipment, and some travel and subsistence fees are all eligible.

More details are given later in this document.

4 THE APPLICATION FORM

4.1 Introduction

All relevant sections of the application form must be completed and the form signed (electronic signatures are accepted) by an authorised signatory and dated.

The boxes on the application form are designed not to expand so please use only the space allocated. If you wish to expand on any element then please use the three pages allowed at the end of the form for this purpose.

Please also note that ITF may ask for more detailed information in either technical content or financial detail as deemed necessary.

4.2 Completion of the Application Form

Section / Field	Guidance
<i>Section A: Summary</i>	
NB	PLEASE NOTE THAT ALL THE INFORMATION PROVIDED ON PAGE 1 OF THE APPLICATION FORM THAT IS DESIGNATED "(PU)" WILL BE CONSIDERED AS PUBLIC DOMAIN INFORMATION.
Project Title	<p>Please provide a title for your project, any acronym which you have given it, and the name of the organisation making the submission.</p> <p>ITF categorises applications into technology areas: Production, Wells, and Subsea; and Subsurface. Please indicate if you able into which category your proposal falls, and also clearly indicate whether your project is for development or trials.</p>
Abstract	<p>The application process is based on maintaining confidentiality of information relating to technologies and companies. However, ITF needs to be able to say some things publicly about the technologies we support.</p> <p>The information contained in the first section of your application is your organisation's pitch for Member Company support. This summary will be circulated around Member Company organisations and should be written to grab attention and allow the organisation to understand and bring its support to your application. If you fail to get the member's attention at this point, it is less likely that your confidential arguments will be read and understood.</p> <p>The more detailed technical and commercial arguments that you</p>

	<p>will make later in the application will only be circulated to Member companies, who are covered by an ITF confidentiality agreement.</p> <p>The abstract should be no more than 1500 characters (with spaces) in length.</p>
<p>Gateway Question</p>	<p>Please indicate clearly how your application aligns with the specific technical requirements of the Call. Note that your application may not be successful if it does not address the specific challenges of the Call.</p>
<p>Project Cost and Duration</p>	<p>Project cost, funding applied for, and duration information should be provided and this should be the same as that provided in detail later in the application (see Section C of the Application Form).</p>
<p>Description of Work</p>	<p>Describe succinctly the work you plan to carry out to achieve the project objectives.</p>
<p>Key Project Milestones & Expected Outcomes</p>	<p>State what are the key project milestones and clearly state what you expect the outcomes of the project to be.</p>
<p>Objectives and Business Case</p>	<p>The applicant should describe briefly what problems or challenges the project aims to address. State clearly the measurable technical and commercial objectives you intend to meet by the end of the project. Moreover, you should explain how the results will assist the oil industry in achieving its own objectives; and how the technology will contribute towards meeting the technological challenges of the industry highlighted in the Call for Proposals.</p> <p>You should convince any potential sponsor as to why they should support your project, i.e. what is the business case that makes your technology attractive. For example, if you can improve production recovery by X%, or the rate of return from investing in this technology will be attractive, etc, then this should be stated. Please be specific.</p> <p>Projects must have certain clearly defined criteria amongst which are:</p> <ul style="list-style-type: none"> • Project should be relevant to Sponsor needs (current or future) • Project should aim for a clearly defined, useful deliverable • Project should have a business case; i.e. what advantage might be gained by sponsorship. Advantage might be technical, competitive, academic, economic, etc • Project should have a reasonable chance of success.

Section B: Innovation and Nature of Project

Innovation	<p>Use this section to highlight the technical innovation in the project and explain why it is a major step forward for the industry. You should also highlight the nature of the project in relation to the state of the art and existing products and practice in this area. You should recognise the work of others in the form of what are the competition and other on-going research and development projects and explain how your project differs and how it will enhance the technology for the benefit of our members and the industry.</p> <p>Remember that you have an opportunity in Section F (see below) to expand on your comments and provide a fuller description, so summarise your comments within the allocated space.</p>
Intellectual Property	<p>You must provide evidence that you own or are entitled to use the intellectual property involved in your project.</p> <p>Outline the steps proposed or already undertaken (e.g. patent searches) to ensure that the proposed work will not result in any infringement of existing intellectual property.</p> <p>Please tell us of any patent applications filed for the technology that forms the basis of this proposal. Where appropriate, please give patent application dates and numbers.</p>

Section C: Field Trials

Nature of Trials	<p>This section of the application specifically relates to your request for support of realistic demonstration (field) trials and testing.</p> <p><i>If you are not seeking field trials at this stage then you do not need to complete this section.</i></p> <p>You should provide details of the nature of the trials indicating what type of test location or asset would be suitable; tell us what it is that you specifically wish to achieve by undertaking this trial. Also we will need to know whether there are any specific technical constraints and/or particular interfaces that are needed.</p> <p>Finally, remember support is only given for <i>proving</i> new technologies in a realistic environment and not for 'marketing' purposes. (Marketing in this context means showing developed technologies to a new audience when that technology has already been deployed in some other global province.)</p>
Trials Location	<p>You should indicate whether the trial can be undertaken on or offshore, and whether the trials can be undertaken in any specific global location. Always bearing in mind that flexibility is the name of the game.</p>

<p>Window of Opportunity</p>	<p>Tell us if there is a specific window of opportunity that you are trying to achieve; you should explain the reason why in the 'nature of trial' box. Please provide details of the window of opportunity by giving us earliest and latest dates and if there is a necessary planning period needed before going to trials and how long the trial will last.</p>
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Section D: Commercial Proposal

<p>Project Management & Timescale</p>	<p>It is ITF's remit to ensure that adequate project management is in place on every project. ITF will not be a Party to the contract for a successful proposal but it will be entitled to attend Steering Group meetings and continue its facilitation role helping to steer the project towards successful implementation.</p> <p>If ITF and members feel it necessary, or the Researcher requests such assistance, then ITF can provide full project management capability. The decision to appoint a Project Manager will rest solely with ITF and the potential project sponsors. In exceptional circumstances ITF may appoint an independent Project Manager to be allocated at the request of the project sponsors. The cost of this provision will be an additional cost to your funding request and will be included as part of the project total for funding by our members. Please contact ITF to discuss this further if applicable.</p> <p>Your proposal should at the very minimum provide a Gantt chart of the major elements of the Work Breakdown Structure showing task duration, interdependency with other tasks, milestones and reporting activities. You should also indicate how you plan to manage the project internally, and provide the decision making and communication structure for the project.</p>
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<p>Work Breakdown Structure</p>	<p>Use this section to identify each work package and briefly describe the nature of work in each element and provide the total cost of each work package.</p> <p>The cost for project management should be provided; however, this will be reviewed by ITF and discussed with you in more detail before any successful project goes ahead. This discussion process should not hinder your timely submission of the application. ITF anticipate that this cost will be of the order of 8-15% depending on the level of project management required, the location, and nature of the project.</p> <p>Once your costs have been calculated and you have decided on the level of funding requested a five percent (5%) Administration Fee should be added to this total and the final figures transposed to Page 1 of the Application Form. The total project cost should be the same as that indicated on the front sheet of the proposal. This Administration Fee will cover the cost of ITF overheads and associated travel and subsistence</p>
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	<p>costs in monitoring the project progress. The Administration Fee will be recovered directly from the Researcher by invoice for 5% of the contracted schedule of payment.</p>
<p>Project Cost Breakdown and Justification</p>	<p>You should break down your total project costs by each of the elements provided and describe what is included in each element.</p> <p>Labour – identify the nature and number of personnel on the project. You should include company overheads but no element of profit; unusually high costs will need justification.</p> <p>Materials – briefly describe the materials required for execution of the project. This will include purchases from third parties; software needed for the project should be classed as ‘materials’ rather than ‘capital equipment’. Any major sub-contractor should be listed separately below. NB. Please include and specify any commercial software license fees necessary and relevant for software incorporated in the project deliverables.</p> <p>Consultancy Fees – describe the nature of the consultancy required, and explain why this cannot be done in-house.</p> <p>Sub-contract charges – where any one supplier represents more than 20% of the project cost they should be identified separately, otherwise they can be included under ‘materials’ as a supplier.</p> <p>Trials and Testing – Where these relate to a development project include them here. Where your request is for trials support you should break down your costs into the other elements.</p> <p>Capital equipment charges – the gross cost of capital equipment will not be eligible unless you provide justification for its inclusion. Otherwise you should include a net cost allowance for use of such equipment depreciated over the life of the project using normal accounting practice.</p> <p>Travel and subsistence – legitimate travel and subsistence costs will be allowed; for example, travel to a members facilities, or travel to monitor trials, or visits to specialists suppliers.</p> <p>Intellectual Property costs – these are legitimate as long as they are new costs arising from the project. In most cases these costs will already have been incurred by your organisation as proof that you own the technology prior to submission of your application. No support is given retrospectively.</p> <p>Admin Fee – An ITF administration fee of 5% will be applied to the funding requested which will be payable by the developer from the allocated funds. This admin fee is provided to cover the cost of ITF operations associated with the project and ongoing monitoring during the life cycle of the project e.g. travel and other associated costs.</p>

	<p>Other – please indicate any other costs that you feel are legitimate.</p> <p>The following are excluded from eligible costs:</p> <ul style="list-style-type: none"> • Value Added Tax (VAT) and other applicable taxes and duties. • Contributions in kind • Inflation and contingency allowances • The cost of preparing the proposal • Interest charges and bad debts • Purchase of land and buildings • Sales and marketing costs • Unless relevant, administrative software, e.g. Microsoft Office.
Project Cash Flow	<p>Please indicate on the table the timing of project expenditure, this is especially important for long duration projects spanning more than one financial year. Financial support aims to give you an advantage by helping the project to be cash positive, but this will depend on achievement of project milestones, and funds will be released by agreement with ITF and the project sponsors. Please note that this section is to be based on the total project cost.</p>
Deliverables	<p>Please list the deliverables and number them in correspondence with the work package elements in the WBS above, e.g. for work package 3, deliverables should be number 3.1, 3.2, etc.</p> <p>The delivery date can be given as Week or Month numbers from the start date of the project, i.e. W1, W16, or M5, M8, etc.</p>

Section E: Implementation

Technology Implementation Plan	<p>The key driver for ITF and its Members is implementation. Implementation means commercialisation, exploitation, and (importantly) the demonstrable use of the outcomes of the project.</p> <p>You will be required as part of the deliverables of the project to produce a detailed Technology Implementation Plan; you should indicate here your first thoughts of how you propose to 'implement' your technology.</p> <p>The Technology Implementation Plan is a report that indicates how you as an organisation, or consortium, intend to bring to use the results of the project, and all other information relevant to full commercial and exploitation.</p> <p>The information that will ultimately be required should be comprehensive, especially if there is a need to find additional partners to carry out this requirement. If you are a consortium then all project researchers (developers) should be involved in</p>
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	<p>the planning of the use and dissemination activities. These could include:</p> <ul style="list-style-type: none"> • Significant aspects of the current areas of use of the results (including market and statutory needs) and expected evolution; • Potential for dissemination and use of results; • Actual practical applications of project use; • Demonstrations given or planned; • Contacts with and commitment from potential users and indications of customer requirements; • Publications and conference presentations resulting from the project.
Benefits	<p>This is a very important section of your application as this will be reflected in any ensuing contract, so please give as full and convincing an answer as possible.</p> <p>Please indicate what commercial benefits you are prepared to offer any potential sponsor, and expand on the details. This information will form part of any potential contract if your application is successful.</p>

Section F: Project Support

Project Champions	<p>We would also like to know if you have already gained interest from any organisation that may be prepared to support this application. This is particular relevant if that organisation is currently one of our Members, or closely associated with us and may provide a positive relationship to your application.</p> <p>Projects will have a better chance of success if they have a project ‘champion’ within any potential sponsor to follow, contribute to, and disseminate results. In some instances no in-house champion will mean no project funding. Hence it is very important that you continue with your own business development activities and do not rely solely on this application process as a substitute. We ask that you inform ITF of any relevant developments, such that we can help ensure adequate communication links within our member organisations; do not assume that we will get to know of your activities and member interest, or vice versa.</p> <p><i>NB. It is essential that you have permission for the inclusion of any named individual or organisation in support of your proposal, and inclusion of such at this application stage does not imply agreed sponsorship from the named organisation.</i></p>
Partners	<p>Please list project partners and the name of the principal (lead) investigator, please include the lead organisation and contact name here also (i.e. the name of the organisation as provided at the head of Page 1). If you are providing a consortium</p>

	application please indicate who your partners are and their specific area of expertise that is necessary for this project.
Other Support	<p>Please indicate whether you have previously, or currently, have applied for support from any other organisation, including government bodies. Also please indicate any outcome of those submissions.</p> <p>Any current or previous submission, whatever the outcome, will not rule out your proposal from consideration. This information will ensure that we can fully co-ordinate any con-current activities to your best advantage. ITF have developed many relationships with international organisations and may be able to help liaise with other programmes that offer the potential of greater leverage to our members.</p>

Section G: Researcher Details

Contact Details	<p>Please give the contact details and the name of the person co-ordinating your application. The information given here, particular in respect of consortia applications, should be the principal researcher and the organisation with which ITF should liaise and who we will ultimately engage with contractually should your application be successful.</p> <p>Ensure that the form is signed by an authorised person. We will accept electronic submissions with an accompanying statement from an authorised representative of the organisation.</p>
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Annex 1: Additional Information

General	<p>Please use the space at the end of the form to provide any additional information in support of your application. This can include further explanations, diagrams, images, tables of data, etc.</p> <p>Please limit this to a maximum of three pages; do not use a font size smaller than the equivalent of Verdana, 10pt (i.e. the format used in this document).</p>
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Annex 2: Company Profile Information

Company profile	<p>Please provide the summary information to give us a brief profile of your company. If you are an academic institution you do not have to complete this form. If you have completed this form in the past six months in recent applications to ITF you will not need to update it.</p>
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4.3 Summary Slides

You are also asked to prepare and provide with your application two PowerPoint slides summarising your project. These slides may be used by ITF in any promotion of your project both with our members and at other public seminars.

Please complete and submit as a MS PowerPoint file rather than PDF file so that we can edit if necessary.

Please limit to maximum of two slides, i.e. your project application in a nutshell. We will ask you if we need more.

Please complete a separate PowerPoint summary for each proposal that you submit.

Please use the basic layout provided overleaf; you can insert your own company logo where indicated.

A MS PowerPoint template, with guidance, for these slides can be downloaded from our website, these are reproduced in Appendix A for reference.

5 GUIDANCE ON SELECTION CRITERIA

5.1 What are the good elements?

Support for projects is at the sole discretion of ITF members.

The selection process will take account of a number of factors; to obtain support some of the criteria that your application must demonstrate:

- You are presenting a clearly innovative technology, or technology development that offers a significant advance over current practice.
- The technology offers benefits that are clearly highlighted to meet the specific requirements of the Call for Proposals and hence our members' needs.
- You must own or have the right to exploit the intellectual property needed to undertake the project.
- You must identify realistic and effective routes to market for relevant commercialisation, exploitation and implementation of the project outcomes.
- The necessary project management and technical expertise is available or will be employed (ITF can offer you support with project management if you require it).
- Both the project and your business are financially viable to be able to complete the project and continue to support the outcomes. ITF member support should be regarded as support for research, technology development, and demonstration and is not a subsidy for your business.

5.2 The 'not-so-good' elements?

Some guidance on what our members are unlikely to support includes:

- The proposal does not meet the specific requirements of the Call for Proposals. You must ask yourself whether your idea is really needed by the end user, and whether it offers significant advantage over current practice.
- Projects which our members interpret to show that the applicant is trying to catch up with the market position, i.e. developing a 'me too' product, will not be supported.
- We will support genuine demonstration of new technologies in field trials; however, we will not support demonstrations that are clearly 'marketing' exercises. By this we mean where technologies are clearly trying to establish a foot hold in a new market region which have been deployed elsewhere globally.
- Unless there is genuine advantage to be gained, projects that are clearly product range expansion will not be received favourably.
- Projects which clearly perpetuate an excessively powerful monopoly position will not be supported. Nevertheless, it is recognised that IPR is protected and needs to be exploited.
- There are no hard and fast rules on the value of projects, funding is available for the 'right' projects. Historically, the average project has been of the order of £300,000 spread over two years requiring up to 6 sponsors each contributing

around up to £50,000 per sponsor per year. Projects which are 'too expensive' will be less likely to receive funding. Some larger valued projects we would recommend are broken down into phases (large projects are considered to be requesting funding of the order of £1m). Nevertheless, we do not discourage large projects providing your proposal offers considerable benefits to the end user; many projects launched by ITF have been in excess of £1m in value. At the opposite end of the scale, small projects with values less than £50,000 will be of equal importance to our members.

- Projects which are 'too long' will also be less likely to receive funding. Ideally our members would like to see projects coming to reality in less than five years. This means that projects lasting more than three years are less favourably looked upon.

6 DEALING WITH 'AD HOC' PROPOSALS

6.1 Introduction

ITF works through a process which defines industry needs through consultation with our members. These themes are identified in our Calls for Proposals through which Researchers/Developers are invited to submit an application for financial support to ITF for technology developments offering solutions to those needs. Whilst the ITF process is predominantly delivered through our Calls for Proposals, ITF operates an open door policy and is pleased to discuss any innovative idea. This results in 'ad hoc' proposals being received for review. The procedure below identifies how these proposals will be considered and a process for their review.

6.2 Process for Acceptance of Proposals for Review

All proposals received for review by ITF must satisfy the basic premise that they must fulfil an industry need. In order to verify this need the following basic process for acceptance shall be employed.

- ITF will generally hold discussions with the Researcher prior to submissions of an application for funding. At this meeting ITF will make it clear what will be required before any 'ad hoc' application is submitted. It may also be necessary for the Researcher to submit information to ITF prior to any meeting, e.g. a one-page summary.
- **The Researcher must satisfy ITF of an industry need in order for any 'ad hoc' application for funding to be accepted for review.**
- To satisfy an industry need the Researcher must have either:
 - A convincing market survey undertaken by an independent party, or
 - An endorsement from an operator (preferably a member of ITF).
 - In brief: no need, no project champion, no project.
 - *NB. ITF will not undertake any market research, nor will it make unsolicited introductions to our member representatives. It is to be assumed that if a Researcher wishes to be part of the upstream oil and gas sector then they will have adequate business development functions within their business; it is not within the ITF role or responsibility to undertake this function on behalf of the development community.*

6.3 Review Process

Given the industry need for the proposal has been verified then it can be accepted for review through the normal ITF process, and as below.


- All ad hoc proposals will be reviewed in the same manner as all proposals received through the normal Call for Proposal route.
- Ad hoc proposals will be collated separately from the agreed theme Calls.

- Where possible ad hoc proposals will be reviewed at the same time as other theme proposal reviews. Where this is not possible ad hoc proposals will be collated and issued for review at approximately quarterly intervals throughout the calendar year.
- The ad hoc proposal review periods will follow the same timeline as the ITF standard timeline and where possible will be dealt with alongside other review stages to ease the burden on our members.

APPENDIX A: SLIDE TEMPLATES

Insert
Your
Logo
Here

Project Title




- Please add here an illustration, graphic, or photo that could be used by ITF in presenting your technology to our members
- Researcher Name
 - General summary
 - Describe your technology
 - Funding Requested (£k)
 - Total Project Cost (£k)
 - Duration (Months)
 - Headline key impact/benefits of technology

Growing technology

Insert
Your
Logo
Here

Project Title



- **Attention grabbing statement No.1**
 - Brief description to back up statement 1
- **Attention grabbing statement No.2**
 - Brief description to back up statement 2
- **Etc., etc...**
- **Identify your target audience**
 - If possible, identify the job functions of those most likely to understand the advantages of your project

Growing technology

This slide template is available to download from our website www.oil-itf.com