



26-WIPC-RFP-04

LONG-TERM ABOVE-GROUND WATER
STORAGE: MANAGEMENT OPTIONS FOR
INDIVIDUAL PRODUCERS AND SHARED
(MULTI-PARTY) USE

BUDGET: \$100,000

PUBLICATION DATE: MARCH 19, 2026

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

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1. Background & Rationale

Producers report recurring re-work and uncertainty when preparing longer-term Above-Ground Water Storage (AWSS) submissions - especially around duration-based requirements under Directive 055, integrity testing expectations, and freeboard/wave-action justification. Alberta's regulatory framework already enables longer-term use of above-ground walled storage systems (AWSS), provided proponents demonstrate compliance with Directive 055 requirements that vary by duration of use (e.g., <3 months; >3 months to 2 years; and 2 years or longer), including integrity testing expectations. The intent of this RFP is not to propose new prescriptive regulation, but to develop producer-facing guidance and evidence packaging that helps operators pursue longer-term AWSS deployment under existing approval pathways.

Long-term storage must also be water-policy compliant. The Water Conservation Policy and Manual 025 require demonstrating the source hierarchy (high-quality nonsaline water → alternative nonsaline → other alternatives), risk-tier expectations, and locally constrained areas, which directly affect when and how a facility is filled and operated. The scope, therefore, binds storage design/operations to source selection, license conditions and seasonal planning—so facilities are both safe and policy-aligned.

Furthermore, any storage incident invokes Release Reporting under EPEA/AER and must tie into Emergency Preparedness expectations (Directive 071, effective Feb 2, 2026), so the scope embeds life-cycle liability controls - from prevention/monitoring through response, documentation, and closure.

2. Benefits to Producers

- Evidence package. Templates and checklists that mirror Directive 055 content expectations (design basis, integrity testing, secondary containment, O&M/inspection, after-use), with cross-references to Directive 058 (oilfield waste handling) and Water Act approvals.
- Water-supply and operations integration. Standardized procedures for filling/withdrawing that satisfy Manual 025 (source hierarchy, risk tiers, constrained areas) and clarify when to use a temporary diversion license (TDL) vs. a term license, with operating triggers keyed to basin constraints.
- Liability clarity - including shared use. A roles/risks/insurance matrix tied to Release Reporting triggers and Directive 071 ERP linkages; closure expectations under Directive 055 are part of the design approach

3. Research Objectives

- Produce a standardized technical evidence package: calculation templates, and acceptance criteria covering design basis, soils/geotech, liner/containment, integrity testing,

freeboard/wave action, O&M/inspection, runoff/after-use, and records - aligned to Directive 055.

- Define liability controls & allocation: a full life-cycle risk register (prevention → reporting → ERP/action → records → closure), Release Reporting thresholds and forms, and Directive 071 ERP alignments. For shared facilities, this will include a governance and insurance term sheet.
- Integrate Manual 025 into operations: show source-selection logic, risk-tier requirements, and constrained-area implications for fill timing and licensing/TDL.
- Scenarios and outcomes mirroring individual vs. shared AWSS models: evidence-based pros/cons on approvals, cost, schedule, logistics, reliability, and liability posture under Alberta constraints.
- Produce producer-facing guidance and a standardized “submission-ready” evidence package that helps operators demonstrate Directive 055 compliance for longer-term AWSS deployments under existing approval pathways (not prescriptive regulatory reform)

4. In Scope

This RFP is focused on long-term AWSS structural and operational performance evidence, and on producing standardized guidance and evidence packaging to support approvals and consistent operations under existing Alberta pathways. This RFP does not seek regulatory reform proposals. Topics that are primarily about water quality classification, conveyance risk, or produced/flowback transport are out of scope here, except where brief interfaces must be identified to ensure AWSS operating assumptions are coherent with other approvals and requirements.

- Design of AWSS, including above-grade or near-surface walled storage systems and engineered containment ponds used for water/compatible fluids supporting UOG operations - per Directive 055 scope.
- All designs, calculations, and O&M content must demonstrably meet Directive 055; where storage interfaces with oilfield waste, ensure alignment with Directive 058; where a Water Act approval/TDL is required, include that pathway; if the configuration is dam-regulated, comply with Dam & Canal Safety Guidelines and the AER Dam Safety Program posture. Emergency preparedness and release-reporting elements must align with Directive 071 and AER Release Reporting requirements.
- Provide a siting checklist addressing proximity to receptors and watercourses; soils/permeability; topography; setback from slopes; access/logistics; seasonal wind climate; and basin constraints that affect filling windows under Manual 025.

- Geotechnical Investigation & Foundation Design Investigation scope: test pits/borings, lab testing, groundwater levels, frost/heave susceptibility, settlement potential, and bearing capacity.
- Design outputs: subgrade preparation spec, liner subgrade CQA, allowable settlements vs. freeboard loss, underdrain/leak-collection feasibility, and slope stability factors.
- Define water quality envelopes per intended use (HQNS vs. alternatives). If fluids meet a waste classification or if handling produced/flowback water for reuse, demonstrate interfaces/controls consistent with Directive 058.
- Development of a closure plan aligned to Directive 055: dewatering, liner removal or managed-in-place criteria (if applicable), subgrade rehabilitation, soil/groundwater confirmation, and after-use notifications.

5. Out of Scope

- Detailed design packages or construction; new hydrometric networks or proprietary models; and regulatory reform proposals

6. Specific Deliverables

- Produce producer-facing guidance and a standardized “submission-ready” evidence package that helps operators demonstrate Directive 055 compliance for longer-term AWSS deployments under existing approval pathways (not prescriptive regulatory reform)
- AWSS Evidence Package with design basis; Geotech report; liner/containment plan; freeboard/wave calc sheet; integrity testing/commissioning plan; runoff handling & after-use; closure outline; record forms.
- Hydrotechnical Module — Inputs (wind climate, fetch), methods (wave height & run-up), freeboard derivation with allowances (setup, settlement), and reduced freeboard justification
- Manual 025 Operational Integration — Source-selection memo template (HQNS minimization), risk-tier worksheet, constrained-area flags, and TDL/licence decision support.
- Liability & ERP Package — Release trigger matrix + forms list (with timing), ERP linkage map (corporate vs. operation-specific), ICS roles, municipal coordination during emergencies.

7. Success Criteria

The project will be considered successful if it delivers producer-facing, practical guidance and standardized evidence packaging that measurably reduces ambiguity and rework for longer-term AWSS deployment under existing Alberta pathways (i.e., not as a prescriptive regulatory reform exercise).

- Producer-facing usability and reduced rework
- Clear scope boundary and consistent terminology
- Alignment to existing regulatory pathways (Directive 055-centred, duration-based)
- Submission-ready evidence package (standardized structure + templates)
- Lifecycle risk, release reporting, and emergency preparedness integration



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

<i>Criterion</i>	<i>Weight</i>
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 Timelines¹

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:

<i>Step</i>	<i>Date</i>
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.