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**Institute for Oil Sands Innovation**

**IOSI Project Exit (Gate 3) Form**

**Section I. Project Information and Deliverables.**

To be filled out by the PI

**IOSI project number and title**:

**Theme**: Extraction, online instrumentation, smart mining, tailings fundamentals, or upgrading/value-added products (delete irrelevant)

**Start and end date** (month, year, note if it was extended):

**Total project budget**:

**Was the project matched by NSERC or other sources**?

**Project team:**

|  |  |  |
| --- | --- | --- |
| **Last, first name** | **Category (for trainees: PDF, PhD student, MSc student, undergraduate, summer student, college diploma, technician…)** | **Affiliation** |
|  | PI (Professor, Research Scientist….) |  |
|  | Co-PI (…) |  |
|  | Trainees – category… |  |
|  |  |  |

**Summarize modifications to original objectives, if any, and reasons (up to 10 lines):**

**What were the main research obstacles or unexpected challenges you faced during the project (if any)? Describe those and their solutions if you believe they are useful for others working in the field (up to 20 lines):**

**Summarize how the project findings may affect the field of study in the world scientific community and for oil sands operations in particularly (up to 20 lines):**

**Was your work done on model systems or real samples? What was the scale of research (lab, pilot, field):**

**Were unique prototypes developed?**

**How many products or technologies were pilot tested?**

**Were new products or technologies launched to market?**

**Start and end TRL:**

<https://albertainnovates.ca/wp-content/uploads/2018/05/Technology-Readiness-Levels.pdf>

**Provide your opinion on the potential knowledge/technology commercialization and the timeline. List advantages, disadvantages, limitations, and requirements (up to 20 lines).**

**Does the Final Technical Report provide enough information to reproduce the conducted experiments/simulations?**

**Does the Final Technical Report include confidential information or a new IP for potential patenting, or all project results were already reviewed and approved by IOSI for release? Confidential information must be removed. If applicable, specify what sections of the Report contain patentable information, in your opinion.**

**List all publications, theses, conferences, presentations, patents, including those in preparation (the information is non-binding):**

**If applicable, provide an estimate of GHG emissions reduced as a result of the project and/or those that could be potentially reduced in the future (kTGHG/year reduced):**

**Has the project achieved any of the following:**

Improved regulatory environment YES/NO

Economic impacts YES/NO

Improved educational and skill level of workforce YES/NO

Changed public attitudes YES/NO

Effective solutions to societal problems YES/NO

Improved environmental sustainability YES/NO

**Describe the outcomes in the question above if YES (maximum 400 words)**

**Comments, if any:**

Principal investigator signature (electronic):

Date submitted:

**Section II. Project Evaluation.**

To be filled out by the industrial steward. Please read the Final Full Technical Report.

**Name, affiliation and email address for each steward. Please indicate if different stewards championed the project at different times:**

**Describe the level of interactions with the PI during the project.**

**Does the Final Technical Report provide a detailed enough description of the experimental and results section?**

**Does the Final Technical Report include confidential information or a new IP for potential patenting? If yes, specify the confidential information for removal (or remove in a track mode in the report file) and potentially patentable results.**

**Describe the project’s potential towards commercialization, critical success factors, and potential killer variables (if applicable).**

**What generated knowledge may be potentially useful in the direct application to oil sands operations in the next 5-10 years? What operations would benefit from this knowledge?**

**Provide recommendations regarding the path forwards.**

**Feedback to the project team.**

**Confidential comments to IOSI, if any:**

Filled out by: (name of the steward) Date of review:

**Section III. SAC recommendation.**

To be completed at a SAC meeting after reviewing the Final Report and Sections I and II of this Form.

Date of SAC meeting:

Is the follow-up project required?

May the Final Technical Report be released to the public? If not, specify the recommendation (confidential information removal, patent application, etc.)

SAC feedback to the research team:

IOSI SAC chair signature: