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**INSAT**

**<<project title (10 words maximum)>>**

**<<Lead applicant>>**

**<<Partner 1>>**

**<<Partner 2>>**

**<<Partner …>>**

***Confidential***

Supported by

Innovation, Science and Economic Development Canada

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**About this project template** - This template is designed to help applicants provide the INSAT Project Selection Committee evaluators all the information needed to assess their proposal against INSAT evaluation criteria and make recommendations to the INSAT Board of Directors for their approval or rejection. It is also designed to provide all the information required to launch the project shortly after project approval by the INSAT Board of Directors. The lead applicant organization and all partner organizations are generically referred to as Applicants\*. Please be comprehensive, but concise. A maximum of 50 pages, Calibri Font size 11, including instructions but excluding appendices and annexes, is allowed.

\* Applicants are defined as all organizations contributing to a project by being actively involved in the technical work or its management or by co-funding the application.

**Red text is meant as guidance for the applicant. Please remove/erase all red text throughout this template prior to submission of your application.**

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1. Project Overview

The intent of this section is to provide high-level information for evaluators and the INSAT team to understand the context and the scope of the proposal. About one page excluding Table 1.4.

* 1. Confidentiality of Project Application

A Project application is treated as confidential and shall only be reviewed by INSAT, the independent Project Selection Committee and the INSAT Board of Directors for the purpose of evaluating the project and seeking funding approval as may be applicable, all of which are bound by confidentiality obligations as well as conflict of interest disclosure obligations to ensure independence and confidentiality. **If the project is funded, the project application will be included as Schedule A to the Master Project Agreement (MPA) to be signed between Applicants and INSAT. As well, INSAT must share a signed copy of the MPA with Innovation, Science and Economic Development Canada.**

Please indicate any specific concerns you may have with the sharing of this document with any person noted above. Please be specific.

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* 1. Project summary and communication (for public dissemination if approved for INSAT funding)

Please provide a project title and a short (maximum 200 words) description of the project. This should be an accurate summary devoid of any proprietary information. It will be used in conjunction with any press releases, possibly on the INSAT website, or other program publicity needs should this project be accepted for INSAT funding.

As an INSAT member, each partner must provide a logo of its organization, which INSAT may use in its communications. We encourage partners to promote the progress and results of INSAT-supported projects as part of the organization's communications and events.

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* 1. Description of the project

Provide a detailed description of the project. Explain contributions to net-zero targets, describe business opportunities, identify the technology gaps, state the project objectives, specify which of the four INSAT pillars is addressed, identify target vehicles (i.e., airplane, helicopter, airship, drone, other), explain the solution(s) foreseen, identify who all the applicants are, together with their overall expenses and contributions (Table 1.4). The total planned expenditures and contributions given in table 1.4 should match.

|  |
| --- |
|  |

1.4. List of applicants and planned contributions (add lines as required)

**Numbers presented in this section MUST correspond with numbers presented in section 7.**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name of****organization** | **Type** | **Planned Expenditures****($CDN)** | **Planned****Contributions****($CDN)** |
| **Eligible** | **Unsupported** |
| Lead partner | Choose an item. | $ | $ | $ |
| Partner | Choose an item. | $ | $ | $ |
| Partner (add/remove lines as needed) | Choose an item. | $ | $ | $ |

|  |  |  |
| --- | --- | --- |
| **INSAT Expected Contribution (Lead Partner)** | **$** | **%** |
| **INSAT Expected Contribution (Partner) (add new rows as needed)** | **$** | **%** |
| **Total Expected INSAT Contribution\*** | **$** | **%** |
| Other funding sources (explain below) |  |
| Source (add one line for each funding source) | **$** |
| Project Total | **$** |

\*Maximum INSAT contribution is 36% of total eligible expenditures for the project overall.

|  |
| --- |
| Details on other funding sources (if any) (one line for each funding source)  |

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1. Applicants

The intent of Section 2 is to provide information for evaluators and the INSAT team to assess the ability of the applicants to deliver the project. The evaluator must understand each applicant contribution to the project and assess if the personnel involved have the relevant expertise and experience to carry out the work.

* 1. Applicant information (list Lead Applicant first, duplicate table as required)

|  |  |
| --- | --- |
| Legal name of applicant organization |  |
| Incorporation date |  |
| Incorporation Number |  |
| Number of employees |  |
| Principal contact name and title |  |
| Mailing address |  |
| Telephone number |  |
| Email address |  |
| Preferred language of communication | [ ]  English [ ]  French  |

* 1. Contribution to project

Describe the role (technical and/or management) played by each applicant and what it will specifically contribute to the project.

|  |
| --- |
| Applicant 1: Applicant 2:… |

* 1. Key profiles

Provide a short (maximum 200 words per) description of the relevant expertise and experience of those expected to play a lead role in the project, either technical and management. Please provide this by applicant and by named individual. You may include relevant resumes or CVs in Appendix 2.

|  |
| --- |
| Applicant 1:Applicant 2:… |

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1. Technical Description

The intent of Section 3 is to provide evaluators and the INSAT team a comprehensive understanding of the project to assess its alignment with INSAT objectives and the technical merit of the solution. Be specific, quantify the target results (starting point and endpoint). Quote your sources, give references.

* 1. Opportunity

Give context. Explain why this project contributes to the net-zero aviation emissions targets. Describe the target market, the business opportunity, and its commercial potential.

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* 1. Overall Objectives

Describe qualitatively the overall technical objectives of the project. What is your target aircraft (airplane, helicopter, airship, drone, other) or infrastructure? What are you going to develop, how will you advance the technological readiness level (TRL) and how will this lead towards net-zero aviation?

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* 1. Challenges

Describe the state-of-the-art, the technology gaps relevant to the proposed project, give the reason why an existing commercial solution cannot be used and explain the challenges of developing a solution that will achieve the objectives stated in section 3.2.

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* 1. Technical solution

Describe the technical solution to be developed and define, quantitatively, the Technical Performance Targets anticipated, in particular net-zero emissions targets. The targets should be measurable to help assess the success of the project. Alternatively, if the project is crucial to future emissions reductions but does not have direct appreciable reductions itself, please detail this including alternate means for measuring the success of the project.

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1. Work Breakdown

The intent of Section 4 is to allow evaluators and the INSAT team to assess the quality of the project plan. This will also be used during project execution to assess progress against the plan and release re-imbursement for the work performed.

* 1. Overall project arrangement

Explain how project delivery is arranged in logical work packages, including their relationship to each other. Provide a detailed summary of each work package. The work packages should tie in with the project plan timeline (section 4.3).

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* 1. Work Packages

Provide a detailed description of each work package using Appendix 1. Include clearly identified and realistic milestones and deliverables. Identify go / no go decision points.

* 1. Project Plan Timeline

Provide a chart (Gantt or similar) to show how work packages are sequenced through time to help assess if the project timeline is realistic. Include delivery points and go / no go decisions points.

Identify and indicate the position of the decision points (milestones, deliverables, work packages, etc.), the limits or objectives (quantitative or qualitative), the evidence (documents, declarations, etc.) and the decisions to be made in consequence with the results.

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1. Governance

The intent of Section 5 is to allow evaluators and the INSAT team to assess the management framework put in place to manage activities, ensure proper interaction among the team members, make critical decisions, address difficulties as they arise and ensure maximum exploitation of the intellectual property generated. As a minimum, a steering committee meeting at least four times a year is compulsory.

* 1. Governance

Describe the governance structure of the project (e.g., executive and management committees as appropriate given the size and complexity of the project) and demonstrate how it will ensure interaction between applicants, critical decision making and conflict resolution. Identify committee members by name, and affiliation. Clearly identify a lead project manager (consistent with your answer at 2.3). Organization charts could be useful.

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* 1. Risk Analysis

Describe the main risks involved and the mitigation strategy. Assign to each a likelihood of happening (1 to 5) and the impact on the project if they were to materialize (high, medium, low).

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Risk** | **Likelihood\*** | **Potential Impact****(H, M, L)** | **Mitigation strategy** | **Residual Risk\*\*** |
| Add line for each risk |  |  |  |  |

\* Rank likelihood from 1 to 5 where 1 is high likelihood and 5 is low.

\*\* Impact of mitigation on both the likelihood and the potential impact.

1. IP Strategy

The intent of Section 6 is to allow evaluators and the INSAT team to assess the ability of the IP strategy to eventually deliver value and benefits to Canadians by exploiting IP to the fullest extent possible, both within or outside aerospace.

* 1. Background IP

*Background IP is IP that is that is brought to the project by each applicant and that is required for the carrying out and or the exploitation of the project.*

Describe the background IP:

|  |
| --- |
|  |

Detail the ownership and or any right to use the background IP. Ownership or the right to use must be sufficient to permit the project to be carried out.

|  |
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|  |

Explain how the background IP will be used in the context of the project.

|  |
| --- |
|  |

* 1. Foreground IP

*Foreground IP is IP that will be created as part of the project.*

Describe the foreground IP expected to be created in the project:

|  |
| --- |
|  |

Describe the intended 1) **ownership**, 2) **protection** (know-how, trade secret, patent, copyright, trademark, or industrial designs) and 3) **licensing** of this foreground IP. Note: exclusive licences are not permitted without INSAT’s prior written consent.

|  |
| --- |
| Ownership: |

|  |
| --- |
| Protection: |

|  |
| --- |
| Licensing: |

Is it expected that ownership of foreground IP will remain in Canada?

|  |
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|  |

* 1. Exploitation of Foreground IP

Describe how the foreground IP generated will be exploited to the fullest extent possible to create maximum value and benefits for Canada. No specific IP arrangements are imposed. However, it is expected that all applicants benefit from the project and that the foreground IP results in as many commercial applications as possible, in aerospace and outside. Data sets which could be made public to stimulate research are encouraged.

|  |
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Is it expected that the exploitation of foreground IP will remain in Canada?

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| --- |
|  |

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1. Expenditures and Contributions Breakdown

**Numbers presented in this section MUST correspond with numbers presented in section 1.4.**

The intent of Section 7 is to allow evaluators and the INSAT team to ensure that the resources requested are eligible and reasonable and to assess if they are commensurate with the work to be done. This information will also be used during project execution to monitor claimed expenses against the project plan. Significant deviations from the budgeted spending profile of the project will have to be documented, justified, and approved through a ‘Change Order’ process.

* 1. Expenditures

Direct Labour (one table for whole project)

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **Year 1** | **Year 2** | **Year 3** | **Total** |
| **Gross salaries** | $ | $ | $ | **$** |
| **Supported overhead1** | $ | $ | $ | **$** |

1. 55% of ‘Gross salaries’ up to 30% of total eligible expenses.

Foreign Services (one table for each project partner) (replicate table as needed)

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **Year 1** | **Year 2** | **Year 3** | **Total** |
| **Foreign Services1** | $ | $ | $ | **$** |
| **Supported foreign services2** | $ | $ | $ | **$** |
| **Supported foreign services** |  | **%** |

1. Everything procured from abroad except equipment used for building prototypes.

2. Same as ‘foreign services’ up to 10% of total eligible expenses for each project partner.

Total Eligible Expenditures (one table for each project partner) (replicate table as needed)

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **Year 1** | **Year 2** | **Year 3** | **Total** |
| **Direct labour1** | $ | $ | $ | $ |
| **Direct Materials2** | $ | $ | $ | $ |
| **Sub-contractors3** | $ | $ | $ | $ |
| **Equipment4** | $ | $ | $ | $ |
| **Travel5** | $ | $ | $ | $ |
| **Other (add lines for each)** | $ | $ | $ | $ |
| **Construction-Land** | $ | $ | $ | $ |
| **Total** | $ | $ | $ | $ |

1. Gross salary + supported overhead (table above)

2. Includes software licenses

3. Canadian + Supported foreign services (table above).

4. Canada and abroad

5. In accordance with Canadian Treasury Board guidance

Total Unsupported Expenditures (one table for each project partner) (replicate table as needed)

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **Year 1** | **Year 2** | **Year 3** | **Total** |
| **labour1** |  |  |  |  |
| **Materials2** |  |  |  |  |
| **Equipment3** |  |  |  |  |
| **Travel** |  |  |  |  |
| **Other (add lines for each)** |  |  |  |  |
| **Total** |  |  |  |  |

1. Gross salary + actual overhead

2. Canadian or foreign services, includes software licenses

3. Canada and abroad

* 1. Direct labour rates and effort

Duplicate table for each applicant

|  |  |
| --- | --- |
| **Participant name** |  |
| **Specialty** | **Hourly rate1** | **Number of hours** | **Total project** |
| Specialty A | $ | $ | $ |
| Specialty B | $ | $ | $ |
| … | $ | $ | $ |
| **Totals** |  |  | $ |

1. Direct labour + supported overhead

* 1. Contributions

Contributions are the anticipated cash outlays from each partner to this project and should reflect the total expenditures outlined in section 7.1 and 7.2. Ineligible contributions (including ‘in kind expenditures’) are not compulsory but are a significant indication of commitment to the project and are highly encouraged.

|  |  |
| --- | --- |
| **Participants** | **Contributions / Cash Outlay** |
| **Year 1** | **Year 2** | **Year 3** | **Total** |
| Company A | $ | $ | $ | $ |
| (one line per participant) | $ | $ | $ | $ |
| (remove extra lines) | $ | $ | $ | $ |
| **Total** | $ | $ | $ | $ |

|  |  |
| --- | --- |
| **Participants** | **Unsupported Contributions** |
| **Year 1** | **Year 2** | **Year 3** | **Total** |
| Company A |  |  |  |  |
| (one line per participant) |  |  |  |  |
| (remove extra lines) |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
| **Total** |  |  |  |  |

|  |  |
| --- | --- |
| **Participants** | **INSAT CONTRIBUTION /PARTNER** |
| **Year 1** | **Year 2** | **Year 3** | **Total** |
| Lead Partner | $ | $ | $ | $ |
| Partner A | $ | $ | $ | $ |
| Partner B | $ | $ | $ | $ |
| **Total** | $ | $ | $ | $ |

|  |  |
| --- | --- |
| **Participants** | **Other Funding Sources** |
| **Year 1** | **Year 2** | **Year 3** | **Total** |
| Lead Partner | $ | $ | $ | $ |
| Partner A | $ | $ | $ | $ |
| Partner B | $ | $ | $ | $ |
| **Total** | $ | $ | $ | $ |

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1. Impacts / Benefits

The intent of Section 8 is to allow evaluators and the INSAT team to understand the benefits or impact of the project and assess if it is commensurate with the public investment requested. Provide quantitative information and give the rationale behind the numbers quoted. Evaluators and the INSAT team should be able to rederive the impact quoted from the information provided.

* 1. Economic impact and benefits

For each applicant, quantify the economic impact targeted, how it is going to be measured and explain the rationale behind the numbers given.

Duplicate table for each applicant

|  |  |
| --- | --- |
| *Participant name* |  |
| *Quantitative economic impact* |  |
| *Methodology/Timeframe* |  |
| *Rationale* |  |

* 1. Environmental impact

For each applicant, quantify the environmental impacts targeted, in particular net-zero emissions targets, how it is going to be measured and explain the rationale behind the numbers given. If the project is crucial to future emissions reductions but does not have direct appreciable reductions itself, please detail this including alternate means for measuring the success of the project.

Duplicate table for each applicant

|  |  |
| --- | --- |
| *Participant name* |  |
| *Quantitative environmental impact* |  |
| *Methodology/Timeframe* |  |
| *Rationale* |  |

* 1. Human resources impact

For each applicant, quantify the number of jobs targeted to be created during the project duration and the cumulative number of jobs created or maintained five years after project completion, how this is going to be measured and explain the rationale behind the numbers given. All types of jobs count, including interns.

Duplicate table for each applicant

|  |  |
| --- | --- |
| *Participant name* |  |
| *Jobs created or maintained* |  |
| *Methodology/Timeframe* |  |
| *Rationale* |  |

* 1. Ecosystem impact

Explain other impacts anticipated namely: Canadian ecosystem development, collateral benefits on other sectors of the economy, generation of open datasets, Equity, Diversity, and Inclusion (EDI), and others if any. Provide quantitative numbers if possible and explain the rationale behind the numbers.

Duplicate table for each applicant

|  |  |
| --- | --- |
| *Participant name* |  |
| *Other impacts* |  |
| *Methodology/Timeframe* |  |
| *Rationale* |  |

---

This proposal is submitted by the following individuals

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Signature of authorized person for Lead Applicant Date

Insert Name

Position

Company

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Signature of authorized person for Partner Applicant Date

Insert Name

Position

Company

Repeat signature block as needed

Appendix 1 - Work Breakdown Structure

Duplicate for each Work Package

|  |
| --- |
| **Work package “n”** |
| Title of Work package |
|  |
| Description of Work package |
|  |
| Participants contributing |
| **Partner** | **Deliverable** | **Expenditures** |
| **Eligible** | **Ineligible** |
|  |  | **$** | **$** |
|  |  | **$** | **$** |
| **Total Expenditures for the Work Package** | **$** | **$** |
| Objectives |
|  |
| Technical approach |
|  |
| Equipment/data used |
|  |
| Anticipated results (quote relevant references) |
|  |
| Milestones / Deliverables |
| **Milestone / Deliverable** | **Description** | **Start Date** | **End Date** |
| # |  |  |  |
| # |  |  |  |
| # |  |  |  |
| # |  |  |  |

Appendix 2 – Resumes / CVs of Relevant Individuals Referenced in Section 2.3

Annex 1 - Letters of commitment from each applicant