

Selected Terms and Conditions for Researcher Participation in IOSI/COSIA Projects

The terms and conditions are provided through the Foundation Agreement between the University of Alberta (UofA) and Imperial Oil Limited, as well as through the Prime Agreement with Alberta Innovates and Agreement with Canada's Oil Sands Innovation Alliance (COSIA). Agreement to these terms will be required if the proposal is accepted for funding. If you have questions before the proposal submission, please contact IOSI Director at semagina@ualberta.ca.

IOSI/COSIA will work with researchers to establish and monitor the progress of research projects, and to ensure that procedures for publication, disclosure of intellectual property, and maintaining confidentiality are followed. Recipients of IOSI/COSIA funding (the organization of the principal investigator will be named as a Research Provider) must agree to the following conditions:

- 1) **Intellectual property (IP)** – The new IP shall be owned by the Research Provider. Certain rights to use the new IP will be granted to the UofA, Imperial Oil Limited and COSIA. Certain rights to use and publish the produced reports will be granted to Alberta Innovates.
- 2) **Confidentiality** – All researchers shall use all reasonable efforts to prevent disclosure to third parties of any confidential information provided by the UofA, Imperial Oil Limited, or COSIA. This obligation does not apply if the information is already known to the researcher, or is revealed by third parties who have no duty to maintain such confidentiality, or after 10 years of receipt of the information.
- 3) **Publication rights** – IOSI and COSIA must be provided with copies of all theses, abstracts, presentations, and manuscripts prior to the submission for publication to permit review for confidential or business-sensitive information.
- 4) **Project reviews** – The projects shall be subject to a staged review process to ensure progress and relevance.
- 5) **Salary** – IOSI emphasizes on training of highly qualified personnel. Therefore, IOSI funds are not to be used to cover the honorarium or salary/benefits of the principal investigators.
- 6) **Termination** – Either party may terminate the Project Agreement within not less than 30 or 90 days, depending on the cause.