Institute for Oil Sands Innovation (IOSI) at the University of Alberta (UofA)

Selected Terms and Conditions for Researcher Participation in IOSI or IOSI/COSIA Projects for vendors/commercial research providers

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) (for collaborative projects with COSIA). Agreement to these terms will be required if the proposal is accepted for funding. More details will be provided if the letter of intent (LOI) is invited for a full proposal. If you have questions before the LOI or full project submission, please contact IOSI Director at xiaolit@ualberta.ca.

IOSI (IOSI/COSIA where applicable) 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. Research providers (organization of the principal investigator) 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 UofA, Imperial Oil Limited (and COSIA where applicable). 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, and COSIA. Such information shall be identified in writing as confidential. 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 (COSIA where applicable) must be provided with copies of all theses, abstracts, presentations, and manuscripts at least 30 days before submission for publication to review for confidentiality and possible IP protection. If IOSI determines that protection of IP is warranted, the submission may be delayed for a period of up to 6 months to secure that protection. On collaborative projects, disclosure of manuscripts to collaborators at least 60 days before publication is also necessary to allow review for any confidential information. Consequent requests to remove confidential information shall be provided within 45 days of receipt of the manuscript.
4) **Project reviews** – IOSI projects shall be subject to a staged review process to ensure progress and relevance.
5) **Salary** – IOSI emphasizes research and training. Therefore, IOSI funds are not to be used to cover salaries of administrative and management personnel.
6) **Termination** – Either party may terminate the Project Agreement within not less than 30 or 90 days, depending on the cause.