
Halifax Ocean Alkalinity Enhancement Joint Learning Opportunity: Terms and Conditions

Definitions:

Applicant:

An organization or individual submitting a proposal to the Halifax Ocean Alkalinity Enhancement (OAE) Joint Learning Opportunity (JLO).

Awardee:

The entity or individual selected to receive funding and support from the JLO to carry out their proposed project. Awardees are responsible for executing the project as outlined in their proposal and are complying with the terms and conditions of the JLO.

Collaborator:

An entity or individual that works with the applicant on the proposed project but is not the primary applicant. Collaborators will receive funds from the applicant and play a specific role in the project's execution. Collaborators are complying with the terms and conditions of the JLO.

JLO Partners:

Organizations jointly issuing the JLO. The JLO Partners include Planetary Technologies (Planetary), the Carbon to Sea Initiative (C2S), and COVE.

JLO Management Team:

The group of individuals responsible for assisting applicants and awardees throughout the JLO process. This team provides guidance, answers questions, and offers logistical and technical support related to the proposal application, project execution, and compliance with JLO terms and conditions. The JLO Management Team can be contacted via email at Innovation@COVEocean.com.

Terms & Conditions are subject to change pending legal review, and will be finalized during the contracting phase between both parties.

Introduction

The purpose of the JLO is to advance the scientific, technical, and social understanding of OAE's viability as a climate mitigation solution. Our aim is to contribute to the generation of knowledge that helps society make informed decisions about the climate's future. This JLO is a part of Carbon to Sea Initiative's broader philanthropic Research and Development (R&D) portfolio.

Eligibility Requirements

These awards are available to individuals or teams affiliated with a registered corporation, nonprofit or charity. These organizations must be legally recognized and capable of conducting research or conservation activities. Applicants should have a strong track record in marine science, environmental research, marine technology, social research, or related fields.

While the JLO is based in Halifax, Nova Scotia, proposals from international applicants are welcome.

Acceptance Criteria

Awardees must demonstrate alignment with the strategic objectives of this JLO, provide a thorough and complete proposal, and commit to the reporting and data sharing requirements as outlined in this document.

Project Agreement

Upon notification of a successful proposal, awardees must sign a Project Agreement outlining the terms and conditions of the funding. This Joint Learning Opportunity is funded through Carbon to Sea Initiative and the funding for successful proposals will be managed by COVE. The agreement must be returned within 14 days to confirm acceptance.

Funds awarded for the Halifax OAE JLO will be paid in two instalments:

1. 80% of total proposed funds will be provided by COVE within three weeks of contract signing.
2. 20% will be provided by COVE within six weeks of project completion.

Data Management & Public Disclosure

Data Sharing Policy

The awardee agrees to publicly share data generated from the funded research within 3-12 months of project completion, depending on the complexity of data analysis and synthesis. Applicants must outline plans for making data accessible to other researchers and the public, including timelines for data release. Any data generated from the JLO shall be submitted to the Ocean Carbon and Acidification Data System ([OCADS](#)) at National Centers for Environmental Information (NCEI), except for Environmental DNA (eDNA) data that shall be submitted to National Center for Biotechnology Information ([NCBI](#)). It is advised to follow the metadata and data standards in the [Guide to Best Practices in OAE Research](#). Priority will be given to

open-access repositories adhering to Findable, Accessible, Interoperable, and Reusable (F.A.I.R.) principles.

Data (if applicable) must be shared under creative commons open licences [CC0-1.0](#) or [CC-BY 4.0](#), except for proprietary data. Compliance with ethical standards and relevant approvals is the responsibility of the applicant, with privacy protections for sensitive data.

Public Communications

The awardee grants JLO Partners the right to publicly communicate about the funded research, including the use of photos, blogs, interviews, and other media, with credit and citation to the awardee.

Awardees retain the right to publish their findings in scientific journals.

Acknowledgment

Publications and presentations resulting from this research must acknowledge the project was conducted as a part of the *Halifax Ocean Alkalinity Enhancement Joint Learning Opportunity*, a collaboration between Carbon to Sea Initiative, COVE, and Planetary, with funding (if applicable) from Carbon to Sea Initiative.

Use of Funds

Funds may be used for direct research costs, including personnel, equipment, materials, analysis, travel and accommodations, vessel chartering and other similar expenses. Indirect costs such as administrative support salaries, general office equipment, etc. may be included but must not exceed 15% of the total project budget. Funds may not be used for unrelated or personal expenses, unrelated business activities or lobbying efforts.

Reporting Requirements

Midpoint Progress Report

Submitted to COVE at the midpoint (+/- five business days) of your defined project schedule. This report must summarize the activities, milestones achieved, and obstacles encountered, compared to the project's planned objectives and timeline.

Final Report

Submitted to COVE at the conclusion of your project (no later than five business days after defined project end date), this document will summarize the project goals, outcomes, lessons learned, next steps for the research team, and your data dissemination strategy. The report should include reference to any in-progress or published literature or media generated as a result of the project.

Financial Report

Submitted to COVE at the conclusion of your project (no later than five business days after defined project end date). A detailed financial report enumerating how the awarded funds have been spent by category.

Regulatory Compliance

Proposals must comply with all applicable laws, regulations, and guidelines, both local and international, that pertain to the proposed research area. This includes obtaining all necessary regulatory permissions before commencing the project where applicable. If support is required in navigating the local regulatory landscape, applicants are encouraged to reach out to the JLO Management Team for support and guidance.

Intellectual Property Rights

Intellectual property generated from the funded research remains the property of the awardee, including for publication in scientific journals, licensing for commercial purposes or further research and development. However, Carbon to Sea Initiative retains the right to a non-exclusive, royalty-free licence to use and distribute the results for non-commercial purposes, for example to further additional research or for educational purposes, with credit and citation to the awardee. This clause supports our mission to allow research to advance climate science and public understanding without commercial constraints.

Contact Information:

For any questions or support related to the terms and conditions, applicants can contact the JLO Management Team at Innovation@COVEocean.com.