

2026 Halifax OAE Joint Learning Opportunity: **Terms and Conditions**

Introduction

The purpose of the JLO is to advance the scientific, technical, and social understanding of OAE's viability as a climate mitigation solution. We aim 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's broader philanthropic Research and Development (R&D) portfolio and MEOPAR's mission of funding leading-edge research, overcoming barriers to collaborative research, and helping to train the next generation of marine professionals.

This Terms and Conditions document provides legally binding rules and requirements that govern the use of grant funds, outlining obligations of both the awardee and the grantor.

Definitions

Applicant:

An organization or individual submitting a proposal to the 2026 Halifax OAE Joint Learning Opportunity (JLO), researching ocean alkalinity enhancement (OAE).

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 complying with the terms and conditions of the JLO.

Application Collaborator:

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

JLO Organizers:

Organizations jointly issuing the JLO. The JLO Organizers include the [Carbon to Sea Initiative](#) (Carbon to Sea) and the [Marine Environmental Observation Prediction and Response Network](#) (MEOPAR).

JLO Partner:

Organizations partnering to host or facilitate aspects of the JLO. This includes [Planetary Technologies](#) (Planetary), which will be conducting the dosing operations, some of the

monitoring, and CDR quantification in the Bedford Basin. For descriptions of the teams involved, see Table 1 in the Request for Proposals.

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 research-network@carbontosea.org.

Research Team:

The core group of scientists, researchers, and engineers involved in the field research described in the Request for Proposal. The research team may provide feasibility reviews, or members may be selected for the review committee, but all final decisions about Awardee selection will be made by the JLO Management Team. May include researchers associated with the [Ocean Alk-Align](#) project, including those from [Dalhousie University](#) who are conducting additional monitoring (from mooring buoys, benthic and pelagic biological monitoring) and modeling (ROMS).

Collaborator:

Contractors supporting the project that will assist with the field research (e.g., engineering or local logistics support) but do not shape the study design.

Award Package:

Up to CAD \$500,000 of funding will be divided between the Awardees. Award packages may also include in-kind services and support for research logistics, as determined on a case-by-case basis. Should no research proposals meet the required criteria, the full award package may not be dispersed.

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

Eligibility Requirements

Eligible recipients of MEOPAR funds include post-secondary institutions, not-for-profit organizations, Indigenous organizations and governments, municipalities, research networks, public engagement networks, organizations and companies that deliver public engagement activities, or start-up companies (including those housed in Canadian post-secondary-linked incubators). Eligible recipients do not include federal departments, agencies, or crown corporations of the Government of Canada. 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 Canada, proposals from international applicants are eligible.

Selection Methodology

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

Proposals for the JLO initiative will be independently reviewed by an experienced and technically proficient advisory committee, Planetary Technologies will provide input on feasibility and scientific merit, and final selection will be conducted by the JLO Management Team (members of the Carbon to Sea Initiative, MEOPAR). In addition to considering the thoroughness and completeness of the proposal, they will be evaluated against the criteria below:

- A. **Scientific merit:** The proposal demonstrates scientific rigor and advances OAE knowledge, and the applicant has the necessary experience, qualifications, and capacity to deliver the proposed activities.
- B. **Strategic alignment:** The proposal addresses key gaps and generates significant and timely insights beyond the scope of existing field activity.
- C. **Technical feasibility:** The proposal presents a clear, achievable approach with a high likelihood of success.
- D. **Equity considerations:** The proposal takes into consideration Equity, Diversity, Inclusion, and Accessibility (EDIA) principles and opportunities to reflect these values in its research.
- E. **Value Proposition:** The proposal demonstrates efficient use of funds, clear value for investment, leverages existing resources where possible, and includes contributions from the research proponent.

An evaluation rubric like the example below (see Appendix A) will be used by the advisory committee to assess applications; however, final selection of awardees will be made at the discretion of the JLO Management Team.

Project Agreement

Upon notification of a successful proposal and after adequately addressing any outstanding questions or clarifications, awardees must sign a Project Agreement with MEOPAR outlining the terms and conditions of the funding. This Joint Learning Opportunity is funded jointly by Carbon to Sea and MEOPAR. The funding for successful proposals will be managed by MEOPAR. The agreement must be returned within 14 days to confirm acceptance.

Funds awarded for the 2026 Halifax OAE JLO will be paid in two instalments:

- 90% of the project funds will be provided by MEOPAR within ten working days of contract signing (before March 31, 2026).
- 10% of the project funds will be paid within 30 days following the receipt and approval by MEOPAR of the project's final report and supporting documentation.

Data Management & Public Disclosure

Data Sharing Policy

JLO awardees with scopes of work that include processing, comparison, or interpretation of dosing, monitoring, or operational data from Planetary Technologies will be asked to sign a Data Licensing Agreement.

Definitions:

- "Data" refers to all datasets collected during the baseline studies, field experiments, and ongoing model runs associated with this project.
- "Data Provider" refers to the organization or individual responsible for generating and managing specific datasets.
- "Data Recipient" refers to an organization or individual who accesses and uses shared datasets.

Data Providers retain ownership of the data they generate. Sharing data within the project consortium does not transfer ownership rights. Data may not be used for external publication, presentation, or dissemination without the Data Provider's explicit written consent. If the Data Provider is not included as a co-author, their name and affiliation should be included in an "acknowledgements" section when referencing the data. This is required in any derivative works, including but not limited to: scientific publications, conference presentations, reports, or policy briefs.

All data should be managed and shared in compliance with Carbon to Sea, NOAA, and Submarine Scientific's published [OAE Data Management Protocol](#). The protocol outlines recommendations for producing consistent data and metadata for Ocean Alkalinity Enhancement (OAE) research projects. With broad adoption, this protocol will make it possible to compare and interpret field research and more quickly advance our understanding of the field.

The awardee agrees to publicly share data generated from the funded research as soon as it is readily available, or **within 2 months of the end of an experiment** (except for biological data). Data (including metadata) **must be archived to the Canadian Integrated Ocean Observation System (CIOOS) within 6 months** of the end of an experiment. This includes QA and QC'd data. For biological data, such as for phytoplankton taxonomy, extracted chl-a concentrations, HPLC, and phytoplankton abundance, the deadline for

submission is extended to 8 months, as these samples take much longer to analyze than nutrient or carbonate samples, for example.

Applicants must outline plans for making data accessible to other researchers and the public, including timelines for data release. In addition to CIOOS, data can be stored in any additional scientific data repository that provides long-term preservation of data (ideally with version control capabilities), metadata hosting, and that provides data citations with a unique DOI (See '[Where to archive data](#)' section of OAE Data Management Protocol). Data may be stored in more than one repository if necessary; however, it is strongly recommended to choose a single repository to aid in discoverability.

Where proposals are Indigenous-led or involve Indigenous Knowledge, data management and sharing will respect Indigenous data sovereignty principles. Applicants may work with the JLO Management Team to develop appropriate agreements that balance open science goals with Indigenous governance and consent.

Public Communications

The awardee grants JLO Organizers 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 that the project was conducted as a part of the *2026 Halifax OAE Joint Learning Opportunity*, with funding from the Carbon to Sea Initiative and MEOPAR.

Use of Funds

Funds may be used for direct research costs, including personnel, equipment, materials, analysis, travel and accommodation, 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 (see more below). Funds may not be used for unrelated or personal expenses, unrelated business activities, or lobbying efforts.

Budget must be submitted according to MEOPAR's Budget Table for Research Awards (Contained within the [Project Budget & Partners Template](#)). It must be broken down into Personnel, Direct, and Indirect costs.

A. Personnel costs
- Salaries: Maximum remuneration costs paid with MEOPAR award funds (including all salaries and rates charged by contractors) cannot exceed the current Full-Time Equivalent rates of pay for public service employees for similar functions and classifications (e.g., SE Scientific Research, AS Administrative Services; CM Communications). Recipients are encouraged to use the GC Jobs 'Search Archives' feature to find appropriate comparisons.
- Technicians: Can include a variety of technical roles within your organization.
B. Direct costs
- Equipment costs must be < \$250k. Eligible costs include: scientific collections; costs of computer hardware or software (except where the scale of costs falls within the mandate of the Digital Research Alliance of Canada); information databases. For items > \$10k, item specifics must be in the budget justification.
- Travel costs should be in line with the National Joint Council Travel Directive.
- Hospitality costs must be aligned with standards set out in Appendix B of the Directive on Travel, Hospitality, Conference, and Event Expenditures
- Professional & Technical Services: Contracted services. Examples: community experts, language translation, artwork, graphic design, etc.
- Other items should be specified in the budget justification.
C. Indirect costs
- Overhead costs: This type of expense, up to 15%, is eligible provided that the rate is established considering the scale of the project (i.e., not using a general flat-rate percentage charge [such as 15%] that does not consider context. A flat rate is explicitly ineligible for this funding call. Justification is required for use of this category in the form of a narrative description of what is being scoped into this category, how it is costed, and why it is required. Please note: for post-secondary institutions, funding from MEOPAR is not part of the calculation for the Research Support Fund . The funders reserve the sole right to determine if these costs are necessary and eligible during the contracting phase.

Reporting Requirements

Public Engagement

Awardees will be required to share public updates about their research plans and preliminary findings. At a minimum, these will include:

1. A Research Plan Webinar before field research commences to inform the public, the Research Team, and the JLO Management Team as to the goals and logistical plans of their research.

2. A Preliminary Outcomes Webinar within 2 months of the end of the experiment to report on what occurred, data collected, and preliminary findings.

Furthermore, awardees are expected to participate in interviews about their research and respond to requests for information in a timely manner.

Final Report

Submitted to MEOPAR and Carbon to Sea at the conclusion of your project (no later than five business days after defined project end date, usually 6 months from final day of research/data collection but may vary, to be determined during contracting), this document will summarize the project goals, outcomes, lessons learned, next steps for the research team, and your data dissemination strategy. The report will also include key performance indicators (e.g., number of publications, presentations, collaborators, etc.). The report should include reference to any in-progress or published literature or media generated as a result of the project, and it is critical that it is received in a timely manner.

Financial Report

Submitted to MEOPAR at the conclusion of your project (no later than five business days after the defined project end date). The report will enumerate 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 (IP) 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 and MEOPAR retain the right to a non-exclusive, royalty-free licence to use and distribute the results for non-commercial purposes, for example, for additional research or 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. Information on MEOPAR's IP policy is [available here](#).

Contact Information

For any questions or support related to the terms and conditions, applicants can contact the JLO Management Team at research-network@carbontosea.org.

Appendix A: Evaluation Rubric

	Outstanding	Very Strong	Strong	Moderate	Insufficient
Scientific Merit (30%)	Project science and experiment design are highly rigorous .	Project science and experiment design are good .	Project science and experiment design are adequate , and few clarifications are needed.	Project science and experiment design require significant clarification .	Project science and experiment design are inadequate .
	The project will significantly advance OAE knowledge if completed successfully.	The project will likely advance OAE knowledge if completed successfully.	The project may advance OAE knowledge if completed successfully.	The project is unlikely to advance OAE knowledge if completed successfully.	The project will not advance OAE knowledge beyond the applicant's own organization.
	The project team is clearly suited to deliver all the proposed activities.	The project team is well-suited to deliver most of the proposed activities.	The project team is suited to deliver many of the proposed activities.	The project team may deliver some of the proposed activities.	The project team is not suited to deliver the proposed activities.
Strategic Alignment (30%)	Project goals are clearly articulated .	Project goals are well-defined .	Project goals are defined .	Project goals are general and lack detail .	Project goals are poorly defined with insufficient details .
	Project goals directly support JLO Knowledge Gaps.	Project goals complement JLO Knowledge Gaps.	Project goals' connection to JLO Knowledge Gaps could be more explicitly stated or developed .	Project goals are of some relevance to JLO Knowledge Gaps, but the alignment is weak or not clearly demonstrated .	Project goals don't demonstrate alignment with JLO Knowledge Gaps.
Technical Feasibility (20%)	Plan and budget elements are very clearly described .	Plan and budget elements are clearly described .	Plan and budget elements are adequately described .	Plan and budget elements are partially described .	Plan and budget elements are unclear .
	Plan and budget elements align with realistic and appropriate timelines.	Plan and budget elements align with realistic timelines	Plan and budget elements are likely to support a realistic timeline.	Plan and budget elements are weakly connected to a timeline that may not be realistic .	Plan and budget elements are unconnected to timelines that are unrealistic .
	Project technical feasibility is explicit and	Project technical feasibility is clear and is	Project technical feasibility is evident and	Project technical feasibility is unclear and	Project technical feasibility is undefined

	will be successfully executed.	likely to be successfully executed.	may be successfully executed.	is unlikely to be successfully executed.	and will not be successfully executed.
EDIA Considerations (10%)	The project's EDIA approach is collaboratively shaped with equity-deserving communities, integrated into daily activities, and guided by principles ensuring accountability through reflection and shared responsibility.	The project demonstrates a clear commitment to EDIA, with meaningful engagement of equity-deserving groups in shaping practices. EDIA principles are integrated into activities, with mechanisms for accountability and continuous improvement .	The project incorporates EDIA principles in its structure and activities, with some engagement of equity-deserving groups. There is a stated commitment to accountability , though mechanisms may be emerging or inconsistently applied .	The project acknowledges the importance of EDIA and shows some initial steps toward inclusion. Engagement with equity-deserving groups is limited , and accountability measures are minimal or unclear .	The project lacks evidence of EDIA integration . There is no meaningful engagement with equity-deserving groups, and no mechanisms for accountability are in place.
Value Proposition (10%)	The budget makes highly efficient use of funds and demonstrates clear value for investment.	The budget makes efficient use of funds and demonstrates value for investment.	The budget makes appropriate use of funds and demonstrates some value for investment.	The budget use of funds shows some inefficiencies , and the value for investment is unclear .	The budget doesn't make efficient use of funds and doesn't have value for investment.
	The project clearly demonstrates the leverage of existing resources and includes strong in-kind support.	The project demonstrates the leverage of existing resources and includes good in-kind support.	The project indicated the leverage of existing resources and includes some in-kind support.	The project's leverage of existing resources is unclear and includes little in-kind support.	The project clearly doesn't leverage existing resources and doesn't include in-kind support.
	The budget includes excellent matching contributions (cash or in-kind) from non-federal sources (ratio 1:1 or higher).	The budget includes very strong matching contributions (cash or in-kind) from non-federal sources (ratio 1:0.7 - <1).	The budget includes strong matching contributions (cash or in-kind) from non-federal sources (ratio 1:0.5 - <0.7).	The budget includes moderate matching contributions (cash or in-kind) from non-federal sources (ratio 1:0.3 - <0.5).	The budget includes poor matching contributions (cash or in-kind) from non-federal sources (ratio of <1:0.3).