



EQUITABLE
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EO Inc. Policy
EOP-104: EO100™ Trademark Use & Licensing Policy



EO100™ Trademark Use & Licensing Policy

- Procedure
 - Policy**
 - Handbook
 - Checklist
-

DATE:	JAN 2022
USAGE:	Public
VERSION:	3.0



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GLOSSARY

Certifiable Unit – The scope of the assessment area including all facilities located within the predetermined geographical area. Facilities include well pads, compressor stations, gas processing plants, batteries, water treatment/storage facilities, and both active and inactive operations. Sometimes used interchangeably with Site.

Certificate - refers to the statement of conformity issued to an Operator upon a successful certification audit of a Unit of Certifiable Unit to the EO100™ Standard.

Certified Unit - Subsequent to the Certifiable Unit achieving EO100™ certification it is called the Certified Unit. Sometimes used interchangeably with Site.

EO100™ Standard – Sets out the criteria for evaluating responsible social and environmental practices in energy development operations.¹

Operator – Project developer - the entity or firm primarily responsible for energy development activities at the project for which certification is sought, as well as all contractors whose activities could reasonably be expected to impact the environment or people in the area of influence.

¹ <https://energystandards.org/responsible-energy-development/>



1.0 PURPOSE AND SCOPE

This policy applies to:

- Operators of energy development, generation, or production units that have achieved certification to the EO100™ Standard
- Approved Assessors who are approved to assess to the EO100™ Standard
- Buyers of EO100™ certified production
- Investors in EO100™ certified operations

This policy describes licensed use by those parties of Equitable Origin trademarks as well as restrictions on fair use of Equitable Origin trademarks.

2.0 REFERENCES

- EO100™ Standard for Responsible Energy Development and relevant Technical Supplements



3.0 OVERVIEW

Equitable Origin Inc. partners with business, communities and government to ensure that energy development is conducted to the highest social and environmental standards. We seek to support transparent, sustainable and equitable natural resource development that benefits all stakeholders.

Equitable Origin has developed trademarks and other copyright material that are its intellectual property. Equitable Origin's trademarks are the primary tool to communicate the achievements of operators that have met the standards set by Equitable Origin and their commitment to responsible energy development. It is essential that Equitable Origin's trademarks are used correctly, that their use does not mislead customers or the public about certification claims, and that they are not associated with quality aspects beyond those covered by Equitable Origin certification.

Equitable Origin has adopted this policy and the rules articulated here to protect the integrity of its intellectual property and authorize its legitimate use.

4.0 PROCEDURE

4.1 License

Only organizations that have a signed, formal written agreement with Equitable Origin may use Equitable Origin Trademarks.

License to use trademarks as described in Section 4.2 of this procedure is granted in the Certification Notification Letter.

The mechanisms by which each category of licensee may obtain written permission to use Equitable Origin's trademarks are detailed in each of the following sections. Violation of the terms of the governing agreement or this procedure may result in revocation of the license to use Equitable Origin trademarks. Equitable Origin reserves the right to take legal action against any party that reproduces or copies Equitable Origin trademarks without prior authorization.

4.2 Certified Unit Operators

License to use trademarks as described in Section 4.1 of this procedure is granted upon certification of the Certified Unit.

Use of text trademarks:

Operators may use text trademarks (non-graphic) only in a fair use setting provided notice is given. For example, operators may wish to include a narrative about their path to certification in a press

release, annual report or ESG report. In that case, it would be acceptable to use EO's text marks within the body of the text if notice is given.

Narrative claims in corporate or promotional literature must provide accurate and comprehensive details that convey the scope and scale of their achievement along with the accompanying certification grade. Close equivalents to the following must be used:

- *"Five of our production sites have achieved certification to the EO100™ Standard at grade A-."*
- *"25% of our production sites are certified to the EO100™ Standard at grade B+."*
- *"All of our operations in Grand North oil field are certified to the EO100™ Standard at grade C+."*
- *"50,000 BPD of our production is certified to the EO100™ Standard at grade A."*
- *"Production at Company ABC sites certified to the EO100™ Standard at an A grade accounts for 25% of our Brazilian output."*

Operators may not imply through use of Equitable Origin's trademarks or name that any operation, unit, division, or function in the corporate group is Equitable Origin certified or is endorsed by Equitable Origin in any way other than for the specific Certified Unit(s) that have achieved certification to the EO100™ Standard.

Where 100% of the operations are included in the scope of the Certification, the Operator may claim to be a Certified Operator, in which case, the following narrative claims may be used:

- *"All of our operations are certified to the EO100™ Standard at grade A."*
- *"Company X is certified to the EO100™ Standard at a grade of B+."*
- *"We are certified to the EO100™ Standard at grade C."*

Use of graphic trademarks.

Operators are licensed to use the following trademark:



- On-site (Certified Site(s) covered by the certification) in the form of flags, banners or similar.



- In corporate or promotional literature as long as it is accompanied by text describing the scope and scale of the certification

4.3 Buyers of Certified Production

Use of text trademarks:

Buyers of certified production may use text trademarks (non-graphic) only in a fair use setting provided notice is given. For example, buyers may wish to include a narrative about how the EO100™ Standard fits into their business' CSR or procurement strategy in a press release, annual report or similar publication. In that case, it would be acceptable to use EO's text marks within the body of the text if notice is given. Acceptable claims may include such statements as:

- *"We support responsible energy production through our procurement policy that references the EO100™ Standard."*
- *"We purchase energy produced by companies/sites certified to the EO100™ Standard."*
- *"We require/encourage our energy suppliers to adopt/certify to the EO100™ Standard."*

Buyers of certified production may not imply through use of Equitable Origin's trademarks or name that its company or operations are Equitable Origin certified or endorsed by Equitable Origin in any way.

4.4 Investors

Use of text trademarks:

Investors may use text trademarks (non-graphic) only in a fair use setting provided notice is given.

For example, investors may wish to include a narrative about how the EO100™ Standard fits into their ESG (environmental, social, governance) investment strategy in a press release, annual report or similar publication. In that case, it would be acceptable to use EO's text marks within the body of the text if notice is given. Acceptable claims may include such statements as:

- *"We support responsible energy production through our investment policy that references the EO100™ Standard."*
- *"We invest in responsible energy producers that are/have sites certified to the EO100™ Standard."*
- *"We encourage energy producers that we invest in to adopt the EO100™ Standard."*

4.5 Approved Assessors

Approved Assessors who wish to promote services related to the EO100™ Standard may request written permission from Equitable Origin to use its main brand identity trademarks on their website and in promotional materials for those services. Acceptable language includes close variants of the following:



- *“We are an Equitable Origin-Approved Assessor authorized to conduct assessments to the EO100™ Standard.”*
- *“We are approved by Equitable Origin to support implementation of the EO100™ Standard.”*

4.6 Trademark Specifications – All Licensees

When used online, where possible, the trademark (text mark or logo) shall have a hyperlink to the Energy Standards website embedded in the mark.

When used in print, the trademark shall, at its first instance in the document, be accompanied by the URL of the Energy Standards website, either in proximity to the trademark or in a footnote on the same page in which the trademark appears.

When used in print, reference to the EO100™ Standard shall, at its first instance in the document, be referred to in full: the EO100™ Standard for Responsible Energy Development”. Thereafter, it may be referred to as the EO100™ Standard with the trademark designation.

Licensees must not alter the proportional dimensions or colors of Equitable Origin’s graphics or logos.



5.0 REVISION HISTORY

Revision No.	Date	Substantive Revisions	Revision by	Approved by
2.0		<ul style="list-style-type: none"> • Changed 'oil and gas production' to 'energy development' • Removed references to Certification Agreement • Added clarification on claims for an operator's production being 100% certified 	S. Mills	EO Board
3.0	14JAN22	<ul style="list-style-type: none"> • Changed all references from 'Certified Site' to Certified/Certifiable Unit • Added that operators must include grades when describing certification • Changed website reference to Energy Standards 	K. Hillis	S. Mills (27JAN22)