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**COORDINATION MECHANISM FOR THE GLOBAL
TAXONOMY INITIATIVE**

Seventh meeting
Montreal, 20-21 November 2006

**REPORT OF THE SEVENTH MEETING OF THE COORDINATION MECHANISM FOR THE
GLOBAL TAXONOMY INITIATIVE**

1. The Coordination Mechanism met at the offices of the Secretariat of the Convention on Biological Diversity in Montreal. The list of participants is attached as annex I. The agenda as adopted by the meeting is attached as annex II.
2. The meeting was opened at 9.30 a.m. on 20 November 2006 by a representative of the Executive Secretary, and was chaired by Christoph Häuser of Germany. The meeting closed at 6:00pm on 21 November 2006. This report summarizes the substantive discussions and agreed action items.

I. GLOBAL TAXONOMIC NEEDS ASSESSMENT (GTNA)

3. The Global Taxonomic Needs Assessment (GTNA) is a planned activity in the GTI programme of work adopted at the sixth meeting of the Conference of the Parties to the Convention. In decision VIII/3, the Executive Secretary was requested to consult with relevant organizations and funding agencies regarding the assessment.
4. The Coordination Mechanism discussed the relative advantages of a “top-down” approach for the GTNA compared to a “bottom-up” approach. The latter would be based on a compilation of national and regional needs assessments. It was agreed that the former is probably preferable – the GTNA should not be based on identified national and regional needs, but rather the GTNA should be “ground-truthed” by examining needs in a few countries.
5. There was also significant discussion of the appropriate focus of the GTNA. The Coordination Mechanism agreed that the GTI is very dilute and that the GTNA could be most effective by focusing not necessarily on taxonomic groups or a broad range of issues, but rather on certain key issues (e.g., invasive species, endangered species, species relevant for the Convention on International Trade in Endangered Species of Wild Fauna and Flora (CITES), access and benefit-sharing) in a way that addresses user needs. The Coordination Mechanism also agreed that the GTNA should address capacity needs to support inventory and monitoring to discover trends (for the 2010 target and beyond).
6. Chris Lyal made a presentation on the GTNA for invasive alien species funded by the United Kingdom Department of Environment, Food and Rural Affairs (DEFRA). The assessment was well-

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received by the Coordination Mechanism and could serve as a key input to, and a model for, the entire GTNA.

7. The Coordination Mechanism agreed that the GTNA should take the form of a report that is a stand-alone publication and not just a CBD report. It could contain a section summarizing existing capacities and resources, and a section that is a strategic assessment of priority needs focusing on three or four areas.

8. Regarding funding, the Secretariat reported that the GEF had been approached regarding the GTNA, but had indicated that they are not currently able to provide funding.

Action 1 – Christoph Häuser will take the lead in coordinating the GTNA, and agrees to distribute a 1-2 page outline to the CM for comments by the end of 2006, with a view to moving forward in 2007 and completing a report for the ninth meeting of the Conference of the Parties to the Convention. Christoph Häuser indicated that he will try to obtain resources for the GTNA and for producing the report.

Action 2 – Coordination Mechanism members are invited to indicate to Christoph Häuser if they wish to participate in a small drafting group (immediately), and are also invited to provide him with suggestions for topics and focus for the GTNA.

Action 3 – Chris Lyal will circulate the GTNA for invasive alien species to the Coordination Mechanism members, and provide the document to the Secretariat for dissemination through the GTI portal.

II. EDUCATION AND PUBLIC AWARENESS ACTIVITIES

9. In decision VIII/3, the Conference of the Parties requested the Executive Secretary to undertake activities related to GTI as part of the Global Initiative on Communication, Education and Public Awareness (CEPA). David Ainsworth, the programme officer responsible for CEPA, explained that taxonomy is one of 10 priorities under CEPA that were established by the that decision. CEPA works in three areas as follows:

(a) *Messaging and media strategies* – in this regard, the Coordination Mechanism identified the following potential target audiences:

- Taxonomists
- Users of taxonomy (Non-taxonomists)
- Scientific societies
- Decision makers
- CBD family including national focal points
- General public
- Amateur taxonomists/field naturalists/collectors
- Children/schools
- Universities

The Coordination Mechanism agreed that initial priority target audiences should be: (i) scientists/taxonomists/scientific societies, and (ii) youth/children. The Coordination Mechanism also agreed that terminology is often a problem in raising awareness about taxonomy, and that creative ways should be found to use language tailored to particular target audiences;

(b) *International Day for Biodiversity (22 May)*. This year's theme is climate change – the Coordination Mechanism felt that this could be related to taxonomy in several ways. David Ainsworth pointed out that the theme should not restrict messages related to taxonomy. As one type of activity, David Ainsworth highlighted the initiatives in many countries whereby part of the day's activities include

24 hour collection and inventory of local biodiversity. Christoph Häuser noted that such an activity is also organized by GEO magazine in Germany, Austria and Switzerland;

(c) *Education curricula.* Children and youth (ages 6-20) are targeted by CEPA through education curricula. David Ainsworth mentioned that children and youth can be reached in many ways, including interactive travelling exhibits, demonstration of museum and laboratory operations, presentation of new technologies such as DNA barcoding, and through websites designed for kids.

10. The Coordination Mechanism brainstormed about GTI input to CEPA in some detail and agreed on a number of action items:

Action 1 – Coordination Mechanism members are invited to submit ideas to David Ainsworth as soon as possible on how to link International Day for Biological Diversity (22 May) to the 300th birthday of Linnaeus (which is also this coming year).

Action 2 – The GTI brochure/flyer will be re-designed in different versions for particular target audiences, or for particular users or issues (e.g., invasive alien species). As a start, Alfred Oteng-Yeboah and Luciane Marinoni will provide David Ainsworth with text for a version for scientists / taxonomists / scientific societies. Annie Webb will then work with David Ainsworth on layout and graphics.

Action 3 – Coordination Mechanism members, by end of 2006, should provide David Ainsworth and Ryan Hill with contact information for scientific societies and institutions in their regions. It is recommended that Coordination Mechanism members liaise with GTI national focal points in their regions in order to do this.

Action 4 – David Ainsworth will raise taxonomy and the outcomes of the Coordination Mechanism meeting at the next meeting of the CEPA Informal Advisory Committee in mid-December, including the idea of integrating taxonomy into education curricula.

Action 5– Ryan Hill and Richard Smith to provide David Ainsworth with information on BioNET's "Why Taxonomy Matters" series, prior to the CEPA-IAC, as a starting point for developing messages showing the importance of taxonomy.

Action 6 –David Ainsworth will continue with lay-out and publication of the GTI Guide. Ryan Hill will then disseminate widely through the GTI portal and directly to GTI and CBD national focal points, wider CBD contacts, biology/biodiversity community, users of taxonomic information, decision-makers and universities.

Action 7 – The Coordination Mechanism recommended that Secretariat staff, GTI national points and Coordination Mechanism members should, whenever possible, attend meetings of relevant scientific societies in order to raise awareness about the GTI.

III. PROJECT DEVELOPMENT SEMINAR

11. The Executive Secretary was requested in decision VIII/3 to convene a project development seminar to promote formulation of projects addressing taxonomic needs. The seminar is tentatively scheduled for 22-25 January 2008 in Montreal, and a notification (reference 2006-107) was sent out to national focal points and relevant organizations regarding funding.

12. As yet there is no funding for the seminar. The Executive Secretary has invited donors (governments, bilateral aid agencies, development banks, foundations, international IGOs and NGOs) to indicate their interest in funding the meeting no later than 1 July 2007, in order to allow enough time for planning. The GEF has already indicated that they cannot support the meeting financially, although GEF staff may be able to participate as resource persons.

13. Regarding the content for the seminar, the Coordination Mechanism made the following observations:

- (a) Its aim should be to link user needs, capacity, and funding potential;
- (b) The seminar should focus on packaging of taxonomic projects so that they are attractive to funders;
- (c) The seminar should, consistent with the requirements of GEF and many donors, provide guidance on how to link taxonomy and its benefits (e.g., conservation and sustainable use of biodiversity). At the same time, strategies should be articulated for selling taxonomic projects that stand alone;
- (d) The content of the seminar cannot be too specific since the idea is to give countries the skills and knowledge to develop projects that address country-specific or region specific needs.

14. The Coordination Mechanism agreed that donors should be invited to the seminar, in part to explain their requirements (for the three or four major interested donors) and also to enable interaction and ‘matching’ with those developing projects.

Action 1 – Chris Lyal will try to locate the 21 GTI Pilot project pre-proposals, because the countries that submitted the pilot project proposals will automatically be considered eligible to participate in the seminar as specified in decision VIII/3.

Action 2 – Coordination Mechanism members are invited to make suggestions to the Secretariat about specific donors who are likely to have an interest in funding the seminar, and what type of content focus such donors would be most interested in, by end of January 2007.

Action 3 – On the basis of suggestions received from Coordination Mechanism members, the Secretariat will approach recommended donors in a manner that is tailored to the needs of that particular organization.

Action 4 – Since submission of national needs assessment qualifies a country to participate in the seminar, GEF secretariat will make efforts to gather the reports from the 51 countries funded under enabling activities to assess capacity needs, including taxonomic needs.

Action 5 – GEF secretariat agreed in principle to attend the seminar in order to explain how the GEF can support GTI-related activities.

IV. REFINEMENT OF THE GTI PORTAL

15. Ryan Hill presented the new GTI portal to the meeting and thanked the Coordination Mechanism for comments provided during the development process earlier in 2006.

Action 1– Ryan Hill will make minor changes and additions to the portal based on feedback received during the presentation, as follows: (a) include link to contact info for Coordination Mechanism members, (b) make explicit link to decisions of the Conference of the Parties on GTI; (c) fix the link to 2006 Catalogue of Life on front page; (d) refine the “search” box so that the portal is returned for any searches on “taxonomy” or “GTI”; (e) Include a link to the Why Taxonomy Matters series, from BioNET’s web page, into the Introduction page to emphasize the benefits of taxonomy; (f) look for language versions of the pdf of the brochure and add if available [should be in the CD containing all of the Technical Series documents]; (g) include available information on national taxonomic needs; (h) regularly update the news section and encourage access by wider CBD/biodiversity community.

Action 2 – Coordination Mechanism members are encouraged to send suggested content for the portal to Ryan Hill at any time.

Action 3 – Richard Smith will send Ryan Hill the report of the February 2005 Coordination Mechanism meeting (SBSTTA 10), which will be considered the sixth meeting, for posting on the GTI portal. The current meeting will be considered the seventh formal meeting.

V. INTERNATIONAL REGIME ON ACCESS AND BENEFIT-SHARING (ABS)

16. The Coordination Mechanism discussed links between the GTI and access and benefit-sharing (ABS), which include, in particular, the importance of taxonomic expertise and capacity-building in enabling provider countries to implement any potential ABS regime; the role of taxonomic expertise in facilitating development of clear rules under any potential ABS regime; and the need to ensure that any ABS regime does not adversely affect access to and exchange of materials for non-commercial research. The links between GTI and ABS, and relevant issues, will be articulated in more detail in an Information document as outlined below in the list of action items.

Action 1 – Ryan Hill and Christoph Häuser (and any other Coordination Mechanism members available at the Secretariat on 22 November) will draft 1-3 paragraphs (deadline 23 November) for the pre-session documentation for the upcoming Lima expert meeting on certificates of origin. The text should indicate the relevance of taxonomy to the discussions and convey the willingness of Coordination Mechanism members to be involved.

Action 2 – Alan Paton will liaise with his colleague from Kew (RBGK) who is attending the Lima expert meeting, to convey the perspective of the Coordination Mechanism.

Action 3 – Coordination Mechanism members are encouraged to attend ABS working group meetings whenever possible and/or to liaise with participants from their countries, organizations or institutions.

Action 4 – A small group, including the following members, will draft an Information document for the next meeting of the ABS working group (September 2007), using document WG-ABS/1/INF/2 (from 2001) as a starting point: Chris Lyal (lead), Hesiquio Benitez Diaz, Scott Miller, Alan Paton, Richard Smith, Lily Rodriguez, Junko Shimura. The document could cover *inter alia* certificates of origin, tools for tracking materials, current modalities of specimen-sharing, cost implications of mis-identification and thus the benefits of allocating resources to taxonomy, relevant information from the Tsukuba declaration, Article 8(j) considerations in ABS discussions (e.g., how does traditional knowledge relate to modern taxonomic knowledge), etc. The timeline for finalization is 1 July 2007, thus a first draft much earlier.

VI. DEVELOPMENT OF OUTCOME-ORIENTED DELIVERABLES FOR EACH PLANNED ACTIVITY OF THE GTI PROGRAMME OF WORK.

17. The Executive Secretary was requested in decision VIII/3 to develop, in consultation with the Coordination Mechanism and others, for each of the planned activities of the programme of work, specific taxonomic, outcome-oriented deliverables to be considered as additions under “(ii) Outputs”, with a timeline for possible consideration by COP-9.

18. The meeting discussed this issue, and agreed that the deliverables should be clear and succinct (e.g., one or two sentences for each deliverable or target) with concrete timelines and clear identification of who is responsible. Also, deliverables should mesh with the 2010 sub-targets where appropriate, and take into consideration the challenges identified in the Millennium Ecosystem Assessment. In cases where it is not clear how a deliverable would be measured, a footnote could be used to comment very briefly on options.

Action 1 – Ryan Hill will collect and put together a list of targets/deliverables for consideration by the Coordination Mechanism by early April 2007. The list will be finalized by end of June 2007, for inclusion in COP-9 pre-session documentation in fall 2007. Also, Ryan Hill will inform other Secretariat staff to take into account, as appropriate, the targets/deliverables for the in-depth reviews of other relevant work programmes.

Action 2 – All Coordination Mechanism members will provide inputs to Ryan Hill by 1 March 2007. The following identifies a lead person and any initial discussions for each planned activity:

Planned activity 1: National needs assessment:

- Lead: Not identified
- GEF agreed to inform the Coordination Mechanism by end of 2006 how many of the enabling activity needs assessments addressed GTI.
- Coordination Mechanism members agreed to contact the national focal points in their regions to find out about the status of taxonomic needs assessments, and to encourage those countries that have not yet completed the assessments to do so as soon as possible.
- Draft: Every country completes a national taxonomic needs assessment by 2010
- Note: important to obtain meaningful, quality assessments
- Ryan Hill (with help from Lily Rodriguez) agreed to communicate the guidance for needs assessments contained in the GTI guide to national focal points.

Planned activity 2: Regional needs assessment:

- Lead: Not identified
- Note: More time (2-4 years) is needed for regional assessment than global or national assessments.
- Note: Could do this by UN sub-regions (equivalent to BioNET's LOOPs).

Planned activity 3: Global needs assessment:

- Lead: Christoph Häuser (also see above, GTNA)
- Timeline is ideally for reporting to COP-9
- Refer to the agenda item on the global needs assessment for further details.

Planned activity 4: Public awareness and education:

- Lead: Alfred Oteng-Yeboah, with help from Luciane Marinoni
- One deliverable might relate to conveying messages to increase awareness about taxonomy, as part of CEPA, by 2008.
- Refer to the agenda item on CEPA for further information.

Planned activities 5-6: Capacity building and cooperation:

- Lead: not identified
- One suggestion for a target for PA#6 is "BOZONET implemented by 2012 and used as a model in at least 3 other sub-regions by 2015".
- Note: DNA barcoding may be relevant

Planned activity 7: Develop a coordinated global taxonomy information system:

- Lead: not identified
- The target referred to in paragraph 7 of decision VIII/3 is part of this planned activity.
- Suggestions for additional deliverables may cover country support to GBIF; reference to particularly important initiatives such as EDIT; reference to progress in digitization of specimens and free provision of the information.
- A guidance document will be created focusing on accessibility of data. A Code of practice will be produced for data held by institutions.

Planned activity 8: Forest Biodiversity:

- Lead: Keping Ma, with assistance of Secretariat (forest programme officer)
- Refer to the programme of work, which will be reviewed in-depth at COP-9

Planned activity 9: Marine and coastal biodiversity:

- Lead: Junko Shimura
- Census of Marine Life / OBIS may be relevant in deriving a target/deliverable.

Planned Activity 10: Dry and sub-humid lands biodiversity:

- Lead: Gideon Smith
- Outputs of SANBI/SABONET are relevant
- Kew and Brazil have relevant information and will make suggestions

Planned Activity 11: Inland waters biodiversity:

- Lead: Alan Paton with help from Alexey Kotov

Planned activity 12: Agricultural biodiversity:

- Lead: Scott Miller with help from Richard Smith, FAO, and the Secretariat
- Refer to the programme of work, which will be reviewed in-depth at COP-9
- Note: A deliverable related to pollinators may be appropriate

Planned activity 13: Mountain biodiversity (details adopted at COP-8):

- Lead: Karol Marhold (Christoph Häuser will put Karol Marhold in contact with DIVERSITAS), with help from Islands programme officer at the Secretariat

Planned activity 13b: Island biodiversity (adopted at COP-8):

- Lead: Junko Shimura, with inputs from ASEANET and SPREP

Planned activity 14: ABS:

- Lead: Chris Lyal
- See other agenda item on ABS.

Planned Activity 15: Invasive Alien Species (details adopted at COP-8):

- Lead: Richard Smith, with Chris Lyal, Scott Miller, Ryan Hill
- Note: Could refer to databases (GBIF/GISD)
- Note: Keep in mind 2010 sub-targets

Planned activity 16: Indigenous knowledge:

- Lead: not identified
- Many Coordination Mechanism members commented that this planned activity is not well elaborated and is unclear
- The Conservation Commons initiative is doing something related to how traditional knowledge gets integrated with taxonomic databases.
- One deliverable might related to the number of countries that have developed systems to protect traditional knowledge.
- Note: Could focus on best practice examples.

Planned activity 17: Ecosystem approach:

- Lead: Hesiquio Benitez Diaz

Planned activity 18: Protected areas (details adopted at COP-8):

- Lead: Christoph Häuser

VII. GTI SPECIAL FUND (AND GLOBAL PARTNERSHIP FOR TAXONOMY)

19. In paragraph 5 of decision VIII/3, the COP invited BioNET and other relevant organizations, in consultation with the Coordination Mechanism, to establish a special fund for the GTI and to report on progress to COP-9.

20. A steering committee including several Coordination Mechanism members (Alfred Oteng-Yeboah, Richard Smith, Christoph Häuser, Leonard Hirsch) have done some initial work to conceptualize the special fund and an associated global partnership, and presented several short draft documents to the meeting. They emphasized that the GTI special fund would be used for training, salary, research, facilities, tools and technology. The focus of this fund would be capacity building for taxonomy and not GTI specifically. The mechanism for delivery would involve public/private partnerships, and the aim is to have in the millions of dollars available per year from a variety of different donors, including the private sector.

21. The Coordination Mechanism members made several observations regarding the special fund, including:

- (a) Fund-raising strategies will need to vary depending on targeted donors;
- (b) Fund-raising is likely to be more successful if the focus is on a limited number of specific issues;
- (c) Governance mechanisms do not need to be worked out in too much detail initially, because funders may have particular requirements;
- (d) Projects should be long-term where appropriate, but can still include short-term and medium-term deliverables in order to satisfy donors.

Action 1 – All Coordination Mechanism members were invited to attend a meeting to further discuss the global partnership and special fund on 22 November 2007 at the CBD Secretariat.

Action 2 – Coordination Mechanism members are invited to provide the Interim Steering Committee (via Richard Smith and Alfred Oteng-Yeboah) comments on the draft documents, suggestions for funding sources, and ideas about priority areas/issues to be addressed (can be region-specific) based on needs that have been identified but not adequately addressed.

Action 3 – The Interim Steering Committee will regularly share progress with the Coordination Mechanism and welcomes inputs from Coordination Mechanism members at any time.

VIII. FUNDING AND THE GEF

22. Under the agenda item on general issues related to funding, the Coordination Mechanism focused on the GEF. Yoko Watanabe updated the Coordination Mechanism on the new GEF Resource Allocation Framework and other issues with implications for funding. Coordination Mechanism members pointed out that many taxonomic projects naturally occur at sub-regional or regional levels, yet only 5% of GEF resources are available for regional and global projects. Yoko Watanabe explained that there are ways for national projects to include regional components or for countries to use national projects to implement regional activities.

Action 1 – Yoko Watanabe agreed to provide the Coordination Mechanism with examples of proposals that could be used as guidance in developing projects with a taxonomic component. These could also be used in the GTI project development seminar.

Action 2 – Yoko Watanabe agreed to complete the analysis of GTI-funded projects (in response to paragraph 14 of decision VIII/3) and send it to the Secretariat by the end of 2006. Yoko Watanabe had circulated a draft to the meeting covering projects up to 2002.

Action 3 – Yoko Watanabe agreed to liaise with the 3 implementing agencies to try to help the Secretariat to obtain copies of the final reports for the 51 enabling activities addressing taxonomic needs.

IX. FUTURE MEETINGS AND FOLLOW-UP

Action 1 – The Chair, on behalf of the Coordination Mechanism, will approach the Executive Secretary for possible funding for the next Coordination Mechanism meeting. Members agreed to plan the next formal meeting of the Coordination Mechanism for no later than COP-9, and earlier if deemed necessary. In the meantime, any Coordination Mechanism members who attend SBSTTA-12 or other meetings will use such opportunities to meet informally.

Action 2 – It was agreed that in addition to putting the report of the meeting on the web and distributing to Coordination Mechanism members, the Secretariat would (a) send the report to GTI and CBD national focal points, and (b) consider other ways to distribute the report, such as making it an Information document for COP-9.

Action 3 – Following a request by Junko Shimura on behalf of Japan, it was agreed that the Secretariat should in the future copy all formal Coordination Mechanism correspondence (e.g., invitation to Coordination Mechanism meetings) to GTI and CBD national focal points, and should also send an update on GTI-related activities to those focal points on a regular basis (e.g., quarterly).

Action 4 – The Coordination Mechanism agreed to convey to the Executive Secretary its feeling that GTI requires a full-time programme officer rather than a half-time position.

Annex I

LIST OF PARTICIPANTS

The following individuals participated in the meeting of the GTI Coordination Mechanism. Not all Coordination Mechanism members were present. The full membership of the Coordination Mechanism is provided through the GTI portal at <http://www.biodiv.org/programmes/cross-cutting/taxonomy/about/coordination.shtml>.

1. Christoph Häuser – Germany (Chair)
Entomological Data Information System (EDIS)
State Museum of Natural History
2. Chris Lyal – UK
Department of Entomology
Beetle Diversity and Evolution Programme
The Natural History Museum
3. Alfred A. Oteng-Yeboah – Ghana
Deputy Director General
Council for Scientific and Industrial Research
4. Gideon Smith - South Africa
Chief Director
Research and Scientific Services
South African National Biodiversity Institute
5. Keping Ma – China
Deputy Director and Secretary General
Institute of Botany, Biodiversity Committee
Chinese Academy of Science
6. Junko Shimura – Japan
National Institute for Environmental Studies
7. Alexey Kotov - Russian Federation
A.N. Severtsov Institute of Ecology and Evolution
8. Karol Marhold – Slovakia
Institute of Botany
Slovak Academy of Sciences
9. Hesiquio Benitez Diaz– Mexico
Director
Enlace y Asuntos Internacionales
National Biodiversity Commission (CONABIO)
10. Lily O. Rodriguez – Peru
Programa Parque Nacional Cordillera Azul

11. Ione Egler – Brazil
Ministry of Science and Technology
Espanada dos Ministérios
12. Luciane Marinoni – Brazil
13. Richard Smith - BioNET International
14. Yoko Watanabe - Global Environment Facility
15. John Herity - IUCN
16. Scott E. Miller
Senior Programme Officer
Office of the Under Secretary of Science
Smithsonian Institution
17. Alan Paton - Royal Botanical Gardens Kew
18. Olivier Jalbert - CBD Secretariat
19. Ryan Hill - CBD Secretariat
20. Annie Webb - CBD Secretariat
21. David Ainsworth - CBD Secretariat

Annex II

AGENDA AS ADOPTED

1. Opening of the meeting.
2. Organizational matters:
 - 2.1 Adoption of the agenda;
 - 2.2 Organization of work.
3. Global taxonomic needs assessment.
4. Education and public awareness activities.
5. Project development seminar
6. Refinement of the GTI portal.
7. International regime on access and benefit-sharing.
8. Development of outcome-oriented deliverables for each planned activity in the programme of work.
9. Funding issues:
 - 9.1 Special fund for the Global Taxonomy Initiative;
 - 9.2 General funding sources for implementation of the programme of work.
10. Next steps and future meetings.
11. Other matters.
12. Closure of the meeting.
