



Project no. 018340

Project acronym: EDIT

Project title: Toward the European Distributed Institute of Taxonomy

Instrument: Network of Excellence

Thematic Priority: Sub-Priority 1.1.6.3: "Global Change and Ecosystems"

**C3.2.8 Progress report on the stability and continuity in the performance of the European Taxonomic Information Services
- including the involvement of the expert community -**

Due date of component: Month 59

Actual submission date: Month 60

Start date of project: 01/03/2006

Duration: 5 years

Organisation name of lead contractor for this component: 5 UvA

Revision 1

Project co-funded by the European Commission within the Sixth Framework Programme (2002-2006)		
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Table of Content

INTRODUCTION	3
CONTEXT OF THE REPORT	3
CHECKLISTS STATISTICS	3
SUSTAINABILITY PLAN PROGRESS	3
EUROPEAN EXPERT NETWORKS MANAGEMENT	3
THE EUROPEAN FOCAL POINT NETWORKS.....	5
PAN-EUROPEAN CHECKLISTS DATA MANAGEMENT SYSTEMS.....	5
TAXONOMIC BACKBONE E-INFRASTRUCTURE AND E-SERVICES.....	6
CONCLUSIONS	7
CONFIGURATION HISTORY	7

Introduction

Context of the report

The EDIT M3.2.4a Sustainability Plan report¹, prepared in collaboration with PESI², provided a roadmap on how the stability and continuity in the performance of the European Taxonomic Information Services could be secured for a post EDIT and PESI period. This follow-up report will evaluate the state of affairs at the end of the EDIT project.

The outline of the report will more-or-less follow the same listing of sustainable (social, conceptual, organisational, and technical) components supporting this objective as used in the EDIT M3.2.4a report.

Checklists statistics

Recently, checklists custodians of the pan-European checklists have been delivered the last versions for integration into the PESI Taxonomic Backbone. The contributions from the involved databases so far include:

Checklist name:	Total number of taxon names	Total number of terminal taxa
<i>Fauna Europaea</i>	234.291	145.906
<i>Euro+Med PlantBase</i>	± 100.000	± 40.000
<i>Europe Index of Fungi</i>	22.379	22.379
<i>ERMS</i>	63.404	33.418

Sustainability plan progress

European Expert Networks management

The PESI Expert Communities Common Infrastructure contains several sustainable components and coordination activities of which the sustainability will be discussed below.

SMEBD: The *Society for the Management of Electronic Biodiversity Data* (SMEBD)³, as an independent organisation, covers the organisation of the European taxonomic work force into a common management structure. SMEBD is an active organisation having yearly meetings and a secretariat, last years funded by EDIT and PESI. To support the yearly cost, to keep the secretarial function in place, an amount of around 7k Euro is needed, which will be obtained via the donations of users requesting for data licences. Sponsoring for the annual meeting costs will very likely be received via the recently started EC FP7 BioFresh⁴ project, currently providing SMEBD's chair position (Hendrik Segers). In addition, some funding is expected

¹ <http://www.e-taxonomy.eu/node/702>

² <http://www.eu-nomen.eu/pesi>

³ <http://www.smebd.eu>

⁴ <http://www.freshwaterbiodiversity.eu>

via the OpenUp!⁵ project, which links parts of its activities, especially those related to zoology, through SMEBD.

EDIT Expert DB: The common European taxonomic experts register system and expert networks management tool, build in collaboration between EDIT WP2 and PESI, is supposed to be maintained as an expertise service through GBIF⁶ after the EDIT project life span.

Expert network management: The supervision of the taxonomic communities contributing to the maintenance of the pan-European checklists is a vital component for the continuation of the updating process. Securing these positions require an in-kind contribution from the hosting institutes for a considerable period, occasionally funded by external resources.

The position of the network manager of *Fauna Europaea*⁷ will be handed over from the Zoological Museum Amsterdam (ZMA)⁸ to the Museum für Naturkunde (MfN)⁹ in Berlin, starting at the beginning of March 2011, offering a sustainable position for an appropriate period.

Similarly the activities on the management of the network of marine taxonomists supporting the continuing updating of the *European Register of Marine Species* (ERMS)¹⁰ is secured by VLIZ¹¹, connected to their ongoing involvement on maintaining the marine data services, including WoRMS, supported by the Flemish government and some running and anticipated EC FP7 projects (like 4D4Life¹² and EcoBOS).

The coordination of the network of experts contributing to *Euro+Med PlantBase* (E+M)¹³ is done by the Botanischer Garten / Botanisches Museum Berlin-Dahlem (BGBM)¹⁴. The future position of the current network manager is unclear and needs further assessment.

The short time management of the *Europe Index of Fungi* (IF-EU)¹⁵ is secured by CABI¹⁶, but it was recently agreed in the CABI management team that a proposal will be written within the next nine months to coordinate national checklist managers to publish their fungal data in a way it can be harvested centrally (perhaps using the IPT¹⁷) to further populate the European checklist portal.

⁵ <http://open-up.eu>

⁶ <http://www.gbif.org>

⁷ <http://www.faunaeur.org>

⁸ <http://www.science.uva.nl/zma>

⁹ <http://www.naturkundemuseum-berlin.de>

¹⁰ <http://www.marbef.org/data/erms.php>

¹¹ <http://www.vliz.be>

¹² <http://www.4d4life.eu>

¹³ <http://www.emplantbase.org>

¹⁴ <http://www.bgbm.de>

¹⁵ <http://pesi.indexfungorum.org>

¹⁶ <http://www.cabi.org>

¹⁷ <http://www.gbif.org/informatics/infrastructure/publishing>

To support the pan-European checklists expert network maintenance, in March-April 2011 some experts meetings will be organised (on PESI budget), especially focused on the coordination of some key taxonomic groups, like the coleoptera.

The European Focal Point Networks

The network of national and regional Focal Point networks, not only assures the efficient access to local taxonomic expertise and resources, but also takes care about the synergistic promotions of taxonomic standards throughout Europe.

The drafting of a continuity plan, to support the future Focal Point activities and the establishment of a Focal Point organisation, is part of the PESI Focal Point Work Plan¹⁸ and will not be further addressed here. The results of this assessment will become available via the PESI Focal Points Wiki¹⁹. This includes guidelines to support National Focal Points as 'Clearing Houses' on establishing national taxonomic standards for collaboration in international (global or regional) and thematic programs.

In this context, collaboratively with the EC FP7 LifeWatch²⁰ management, a concerted approach is drawn to include National Focal Points into the National LifeWatch Network program.

Finally, as part of EDIT WP3.2 Focal Points work plan, INCO proposals have been drafted to set up regional Focal Point networks in the Caucasus and at the Balkan, including the NBRC proposal (EDIT C3.2.3b).

Pan-European checklists data management systems

To allow for the proper maintenance and updating of the pan-European checklists data, the hosting of the associated data management systems needs to be secured, as well as competent staff, to carry out relevant data management tasks, to be employed.

The hosting of the *Fauna Europaea* databases is secured in Amsterdam at SARA²¹ until at least the end of this year. In this period the database systems will migrate to Berlin. This will not be done immediately (following the data management transfer), because the Berlin team prefers directly to make Fauna Europaea accessible from the CDM-store. This move is already anticipated in PESI (meaning that FaEu is already implemented into the CDM-store of the Cybertaxonomy Platform), but firstly the relevant data management tools need to be adapted according to the zoological standards and practise. For this purpose a few pilots will be set up for testing.

¹⁸ http://www.eu-nomen.eu/pesi/index.php?option=com_remository&Itemid=56&func=fileinfo&id=384

¹⁹ <http://pesifocalpointhandbook.wikispaces.com>

²⁰ <http://www.lifewatch.eu>

²¹ <http://www.sara.nl>

The maintenances of both the *Euro+Med PlantBase* and the *European Register of Marine Species* database systems is secured at the respective hosting instances (BGBM and VLIZ) for a period of at least five years.

For the *Europe Index of Fungi* the existing database and web site is secure and managed until 27th August 2012 (when the current custodian retires). Also after that date at least the hosting of the service will be secured for a certain period when no alternative hosting could be arranged, although new data entering could be reduced.

The future of *AlgaeBase*²² is rather uncertain due to complications that have arisen recently with the University of Galway and with the company developing the software and hosting the database. In view of this an Advisory Board is set up to consider proposals for the continuance of *AlgaeBase*.

In collaboration with the 4D4Life project, PESI will draft a sustainability plan (PESI D5.4) to address the cost issues on the long-term maintenance of EU-based *Global or Regional Species Databases* (GSDs/RSDs).

Taxonomic Backbone e-Infrastructure and e-Services

Beside the above mentioned data management systems, to ensure the long-term stability and continuity of the European Taxonomic Backbone services, also the specifically developed information infrastructures, taking care about the data integration, validation and dissemination needs to be secured.

The integration of the pan-European species checklists into a (joint) European information infrastructure advances from the EDIT ‘Internet Platform for Cybertaxonomy’²³, especially the Common Data Model²⁴ store (CDM-store). The pan-European checklists are integrated into a single *PESI Data Warehouse*, which also operates as a platform to run quality control routines and publication services and to coordinate the assessment of taxonomic meta-data standards (e.g. on persistent identifiers and shared vocabularies)²⁵. In addition, the PESI Data Warehouse serves as a hub to other biodiversity information infrastructures, like the Global Names Architecture and Catalogue of Life (see EDIT C3.2.8). The technical maintenance of the Cybertaxonomy Platform and the included PESI components is secured for five years, as part of the BGBM commitment to EDIT, PESI and some recent and upcoming EC FP7 projects (see EDIT C3.2.8), however, this not necessarily includes the relevant staffing taking care about the updating of the Taxonomic Backbone content and related tasks.

²² <http://www.algaebase.org>

²³ <http://www.cybertaxonomy.org>

²⁴ <http://dev.e-taxonomy.eu/trac/wiki/CommonDataModel>

²⁵ http://www.eu-nomen.eu/pesi/index.php?option=com_remository&Itemid=56&func=fileinfo&id=490

A common user web-interface for searching the PESI Data Warehouse is developed as part of the *PESI Portal*²⁶ hosted by VLIZ. Apart from the PESI Data Warehouse, also additional information files, like the Focal Points taxonomic expertise and resources database and the commons names are linked to the PESI Portal. The PESI portal not only includes user services searching for taxonomic names, but also web-services facilitating names validation and advanced searches, like those on Europe's prioritised species (see EDIT C3.2.10). The technical maintenance of the PESI Portal is secured for five years, based on VLIZ commitment to PESI, LifeWatch, CoL and some scheduled marine EC FP7 projects (like EcoBOS and iMarine). Even more guarantees on a long-term PESI Portal functioning can be offered when the LifeWatch-Flanders proposal will be granted.

Conclusions

At the moment a firm basis exists supporting the stability and continuity of the pan-European Taxonomic Backbone services as described in the above report. The issue of the long-term sustainability of the pan-European Taxonomic Backbone will be further explored in the PESI Business Plan report (PESI D1.3) to be completed before the end of April 2011.

Configuration History			
Version No.	Date	Changes made	Author
1.0	27 February 2011	Final draft submitted	YdJ

²⁶ <http://www.eu-nomen.eu/portal>