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THE GLOBAL TAXONOMY INITIATIVE

Report on progress and status

Note by the Executive Secretary

I. INTRODUCTION

1. In its decision III/10, on identification, monitoring and assessment, The Conference of the Parties established the need for specific action under the Convention in taxonomy, by endorsing recommendation II/2 of the Subsidiary Body on Scientific, Technical and Technological Advice (SBSTTA), which recognized the need to take measures to alleviate the scarcity of taxonomists, taxonomic collections, taxonomic information, and institutional facilities worldwide, to assist countries in implementing the Convention, and recommended the development of guidelines and programme priorities for capacity-building in taxonomy.

2. At its fourth meeting, in its decision IV/1 D the Conference of the Parties endorsed, as initial advice, a set of "Suggestions for Action" to develop and implement a Global Taxonomy Initiative (GTI), and stressed the urgent need for capacity-building in all fields of taxonomy to assist in the implementation of the Convention.

3. At its fifth meeting, in its decision V/9, the Conference of the Parties urged Parties, other Governments and relevant organizations to undertake a series of priority activities, and requested the Executive Secretary to draft a work programme for the Global Taxonomy Initiative defining timetables, goals, products and pilot projects. That work programme is before COP in its sixth meeting as document UNEP/CBD/COP/6/3.

* UNEP/CBD/COP/6/1 and Corr.1/Rev.1.

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4. The purpose of the present note is to report on progress on activities relevant to the GTI including:
- (a) Progress in assessing and prioritising the most urgent taxonomic needs and facilitating the formulation of specific regional and national projects to meet the needs identified;
 - (b) Progress in the establishment of the GTI Coordination Mechanism;
 - (c) Progress in developing a programme of work for the GTI;
 - (d) Progress in submission and evaluation of pilot project proposals;
 - (e) Progress in designation of national Global Taxonomy Initiative Focal Points; and
 - (f) Progress on the Suggestions for Action made by the fourth meeting of the Conference of the Parties: assistance for the Executive Secretary.

In addition, an outline of the methods of implementation of the GTI is provided.

II. PROGRESS REPORT ON RECENT ACTIVITIES RELEVANT TO THE GTI

A. *Progress in assessing and prioritizing the most urgent taxonomic needs and facilitating the formulation of specific regional and national projects to meet the needs identified.*

1. *Synthesis of reports from major meetings of experts*

5. Several key meetings of experts have been held to identify elements for the further development of the programme of work on the GTI. The meetings include, among others:
- (a) The Crete workshop convened by DIVERSITAS in 1997;
 - (b) The Darwin Workshop on "Removing the Taxonomic Impediment", co-convened by Environment Australia and the National Museum of Natural History, Smithsonian Institution, in 1998 (UNEP/CBD/COP/4/INF/28);
 - (c) A meeting on "The Global Taxonomy Initiative: Shortening the Distance between Discovery and Delivery", held in London in 1998, at the Linnean Society, under the auspices of DIVERSITAS, the Scientific and Technical Advisory Panel of the Global Environment Facility (GEF) and Environment Australia (UNEP/CBD/SBSTTA/4/INF/1);
 - (d) The New York workshop on "Using Systematic Inventories to Meet Country and Regional Needs" held in 1998 (document UNEP/CBD/SBSTTA/4/Inf/7); and
 - (e) The Paris meeting of the Expert Panel on Taxonomy of DIVERSITAS, core programme element 3, on "Implementing the GTI", held in Paris in 1999, to give an overview of current taxonomic knowledge of species diversity, and some recommendations on opportunities and priorities, and suggestions for capacity building, taking into account the earlier DIVERSITAS workshop in Crete (UNEP/CBD/SBSTTA/4/INF/6);

(f) A meeting held in 1999 at UNESCO, Paris, entitled “Mechanisms for management of the GTI, with a consideration on inclusion of traditional and indigenous knowledge perspectives on current taxonomic systems” (UNEP/CBD/SBSTTA/5/INF/GTI);

6. Major findings of these workshops include:

(a) Recognition of the existence of a taxonomic impediment to sound management and conservation of biodiversity. Removal of this impediment is a crucial, rate-determining step in the proper implementation of the Convention’s objectives. There is an urgent need to train and support more taxonomic experts, and to strengthen the infrastructure required to discover and understand the relationships among the world’s biological diversity;

(b) Information derived from biological collections held in the world’s taxonomic institutions underpins the global, regional and national efforts to conserve biological diversity. The collections, staff and associated information serve as an essential resource for countries in fulfilling their obligations under the Convention on Biological Diversity;

(c) Accordingly, a taxonomic perspective should be integrated into policies and programmes established at all levels of government to achieve sustainable development and conserve biodiversity. Taxonomy should underscore all national, regional and global programmes for inventory and monitoring of biological resources in ecosystems and requirements for broad-scale environmental assessment;

(d) The need to develop initiatives for critical taxa. It is crucially important to develop a few new pilot projects, bringing together resources of governments, institutions and scientists, that will address the critical areas of biodiversity. Ideally such projects would involve taxonomic groups that require international cooperation: groups of taxa with a broad geographical distribution, that are relevant for the objectives and priorities and which will yield results in the short term;

(e) Capacity-building for taxonomy should be linked to the effective implementation of the Convention on Biological Diversity, particularly the national identification of areas of high diversity; improving the understanding of ecosystem functioning; giving priority to threatened taxa, taxa that are or may be of value to humanity, and those with potential use as biological indicators for conservation and sustainable use of biological diversity;

(f) Development of guidelines and programme priorities for funding, including for the financial mechanism under the Convention, should take account of the specific needs for capacity-building in taxonomy to serve areas such as bioprospecting, habitat conservation and the sustainable use of biological diversity. Such support should recognise the need for adequate, long-term housing of collections and records and long-term research;

(g) For new taxonomists to be recruited, there is a need to provide employment opportunities. It is urgent that Parties take this need into consideration and integrate it into the programme of capacity-building;

(h) Where appropriate, national taxonomic needs assessment and action plans should be developed by setting national priorities, mobilising available institutional resources, and identifying available funds. Countries could benefit from regional and subregional collaboration;

(i) Establishing regional and subregional training programmes is important. Attention should also be given to the training of specialists, parataxonomists, and technicians in this field. The field of taxonomy must be integrated with training activities such as biological monitoring and assessments. Maximum use should be made of existing institutions and those organisations active in these fields;

(j) There is an urgent need to make the information on existing taxonomic knowledge, including information about the taxa in worldwide collections, available to countries of origin;

(k) Taxonomic information to assist capacity-building in taxonomy should be included within the clearing-house mechanism. The taxonomic work embodied in existing archives and inventories, field guides and publications needs to be updated and readily accessible through worldwide services and unnecessary duplication of work should be avoided. The dissemination of information should further the objectives of the Convention and be linked to user needs. This sharing of information will require greater international collaboration. It should also be recognised that traditional taxonomic systems offer a valuable perspective on biological diversity and should be considered part of the total taxonomic knowledge-base at national, regional and subregional levels;

(l) Since taxonomy generally involves the use of biological collections, those concerned should consider the adoption of mutually agreed upon material transfer agreements or equivalent instruments in accordance with the provisions of the Convention on Biological Diversity for exchange of biological specimens and information relating to them;

(m) Framework taxonomic activity, which is necessary to help implement the Convention on Biological Diversity, and which requires differing levels of support from the GEF, includes the need to provide adequate resources for the creation of taxonomic infrastructure (collections, equipment, human resources) in countries where it does not yet exist, or is poorly developed or inadequate, and improvement of existing infrastructure especially in developed countries;

(n) Taxonomic / systematic questions, which are essentially global in nature, must be approached through cooperative efforts at national, regional and global levels;

(o) The description and collation of the world's species diversity cannot be completed in a reasonably short time, without modifications to the ways species are described and recorded. Given the rapid improvements in information technology, it is perhaps time to consider the establishment of an electronic journal devoted to species descriptions, or the establishment of worldwide coordinated databanks, into which new descriptions must be logged after publication.

2. *National taxonomic needs assessments*

7. Decision IV/1 D of the fourth meeting of the Conference of the Parties invited Governments to submit any reviews or studies on specific taxonomic needs identified within each country, as well as any information on national taxonomic needs assessments that may have been undertaken. To facilitate that request the Executive Secretary requested all national focal points of the Convention on Biological Diversity in April 2000 (with a reminder sent in September 2000) to provide relevant information by 8 October 2000, using a short questionnaire.

8. Sixty countries provided responses to the questionnaire, namely Australia, Austria, Bahamas, Bangladesh, Belarus, Belgium, Belize, Botswana, Costa Rica, Croatia, Djibouti, Egypt, Eritrea, Estonia, Ethiopia, Fiji, France, Germany, Greece, Iran, Ireland, Israel, Italy, Jamaica, Japan, Kenya, Kiribati, Republic of Korea, Latvia, Lebanon, Lesotho, Malawi, Mali, Mauritius, Mexico, Morocco, The Netherlands, New Zealand, Niger, Oman, Peru, Philippines, Romania, Russia, St-Lucia, Samoa, Singapore, Slovakia, Slovenia, South Africa, Sri Lanka, Swaziland, Sweden, Switzerland, Thailand, Turkey, the United Kingdom, Vanuatu, Venezuela, and Yemen.

9. The responses were analysed, and are summarised in document UNEP/CBD/SBSTTA/6/INF/4.

10. In paragraph 2(b) of its decision V/9, the Conference of the Parties urged Parties, other Governments and relevant organizations to undertake assessments of national taxonomic capacity to identify and, where possible, quantify national and regional-level taxonomic impediments and needs,

including the identification of taxonomic tools, facilities and services required at all levels, and mechanisms to establish, support and maintain such tools, facilities and services.

11. The analysis of the second national reports concerning cross-cutting issues (UNEP/CBD/COP/6/INF/10) indicates that of the responding Parties, 20 (33%) had not prepared a national taxonomic needs assessment, nor had held workshops to determine national taxonomic priorities; 45% declared that the assessment was in its early stages; and 7% had a completed assessment, although one of these had commenced a reassessment. Approximately half of the Parties that declared a completed assessment or an assessment at advanced stages of development are industrialized countries (2 out of 4 and 3 out of 7, respectively). Assessments are at early stages of development in the majority of economies in transition. Developing countries constitute the majority of Parties that declared that they had not assessed national taxonomic priorities.

3. *Regional meetings of scientists, managers and policy makers*

12. In paragraph 3(b) of its decision V/9, the Conference of the Parties requested the Executive Secretary to initiate short-term activities, including regional meetings of scientists, managers and policy-makers to prioritize the most urgent global taxonomic needs and facilitate the formulation of specific regional and national projects to meet the needs identified.

13. In this regard, the Swedish International Development Cooperation Agency (SIDA) provided funding for two regional meetings, plus background research and the preparation of meeting reports.

14. In preparation for both meetings national focal points for the Convention in the region were urged to provide completed taxonomic needs assessments as a basis for discussion at the meetings. Major objectives and outputs of the meetings were to:

(a) Enable African/Central American countries and collaborating institutions to gain clarity on the principles, role and mechanisms of the GTI;

(b) Establish a comprehensive strategy and achievable workplan according to which funding for building capacity in taxonomic research in Africa/Central America can be accessed from the Global Environment Facility;

(c) Initiate and urge Governments to support the completion of new regional, subregional or national taxonomic needs assessments, where these do not exist;

(d) Formulate specific national, subregional or regional projects aimed at meeting the most urgent taxonomic needs;

(e) Produce a final report that can act as a guide to achieve these objectives.

15. The first meeting to take place was in Central America. The 20 participants included representatives from each of the 7 countries making up Central America (Costa Rica, Guatemala, Honduras, Belize, Nicaragua, El Salvador, Panama), Mexico, Jamaica, two taxonomic networks (BioNET-INTERNATIONAL and Red se Herbarios de Mesoamerica y del Caribe), three taxonomic institutes from industrialised countries, and the ALL-species Foundation. The GEF participated via telephone conference. The Workshop was held from 5 to 9 February 2001.

16. Before the Workshop a questionnaire was widely circulated in Central America, attempting to identify needs, priorities and limitations. The results of this are summarised in the table below (from unpublished report 'Development of Taxonomic Capacity in Central America').

Country	Needs	Priorities	Limitations
Belize	Training. Infrastructure for collections. Access to information.	Training.	Insufficient budget. Limited infrastructure. Lack of specialized literature. Lack of trained personnel.
Costa Rica	Training. Budget. Institutional cooperation. Collecting. Up-dating of information.	Inventories of big and complex groups. Inventories in zones not yet studied. Dissemination of information.	Insufficient training. Insufficient budget. Little public appreciation for taxonomy.
El Salvador	Training. Budget. Specialized literature. Equipment. Contact with specialists.	Training. Budget for collections. To begin national inventories. National Biodiversity Centre.	Little public appreciation for taxonomy. Limited budget. Lack of trained personnel. Little inter-institutional communication.
Guatemala	Training. Budget. Political support. National inventories. Development of a database. Inventories of little studied taxonomic groups.	Training Repatriation of information. National Biodiversity Centre. Support for collections. Inventories of little studied taxonomic groups.	Little political and student interest. Lack of financial motivation. Little training. Insufficient budget. Limited literature. Lack of trained personnel.
Honduras	Training. Budget. Specialized literature. Research.	Training. Financial resources. Beginning of national inventories. Cataloguing and development of collections.	Little appreciation of taxonomy. Lack of trained personnel. Insufficient budget.
Nicaragua	Training. National inventories. National Biodiversity Centre. Political support.	Inventories in zones which have not been studied yet. National Biodiversity Centre. Up-dating of collections.	Lack of trained personnel. Little national and global interest. Lack of a specific strategy.
Panama	Training. Budget. National Biodiversity Centre. Equipment. Infrastructure. Network of museums.	Increasing budget. Improvement of infrastructure. Training.	Little appreciation of taxonomy. Insufficient budget. Little available information. Lack of regional networks.

17. In terms of regional objectives and priorities the following summary table was produced (from unpublished report “Development of taxonomic capacity in Central America”).

Development areas	Issues
1. Human resources	<ul style="list-style-type: none"> • Training in biodiversity management • Training in taxonomy • Training in collection management
2. Access to information	<ul style="list-style-type: none"> • Regional documentation center • Mechanisms for the spread of information • Communication networks • Socialization of information • Systematisation of existing information in each country
3. Alliances	<ul style="list-style-type: none"> • Establishment and strengthening of work networks • Development of alliances between national and international institutions • Information exchange

18. The second regional meeting considered all of Africa, and was held in South Africa from 27 February to 2 March 2001. The 53 participants represented 23 African countries, at least 6 African international networks, 7 ‘Northern’ institutes or networks, and 1 ‘Southern’ institute. Two members of the GTI Coordination Mechanism attended. The representatives provided good regional coverage, with specific emphasis on ensuring adequate representation from French speaking nations, zoologists and microbiologists.

19. From the questionnaire responses, a taxonomic needs assessment for Africa was drawn up, as follows (from “Klopper, Smith & Chikuni (eds), 2001, The Global Taxonomy Initiative: documenting the biodiversity of Africa” Strelitzia 12).

(a) Africa and its surrounding islands can be considered as a biodiversity hotspot that has fascinated explorers and adventurers for many decades. It consists of diverse habitats ranging from equatorial rainforests to deserts, and possesses unique flora and fauna. With its great biological diversity, the continent and its islands are a utopia for taxonomists. However, the vastness of the continent and the lack of infrastructure and funds often severely hamper research on its unique organisms and ecosystems. Much work has been done in Africa by explorers and scientists from Northern institutions, but even more work still remains to be done before we can fully understand and conserve the immense biodiversity of the continent, which is being lost at an unprecedented rate owing to expanding human populations and activities;

(b) No other surveys have been conducted for taxonomic institutions in Africa as a unit. This survey attempted to cover the whole of the African continent and its surrounding islands. Thus it is the most detailed and comprehensive survey yet conducted. The report presents the survey results in 11 sections: needs assessment, collections, projects, collaboration, staffing, teaching of taxonomy, infrastructure, inventories/floras, priority taxa, taxonomic information, and stumbling blocks. A general summary for the region under each section, as well as a summary for each country, was prepared. The appendices provide detailed information for individual countries;

(c) *Needs assessment.* Almost half of the respondents indicated that no taxonomic needs assessment had been done in their countries. Most taxonomic needs assessments have been done for

vascular plants, with invertebrate and vertebrate animals, nonvascular plants and fungi lagging far behind. Great gaps exist in our knowledge of the taxonomic needs of northern, central and southeastern Africa;

(d) *Collections.* All countries indicated that major biological collections were kept in their countries. However, most of them are not adequately staffed and only a few are electronically databased or in the process of being databased. Furthermore, only half of the countries indicated that their collections were actively curated. However, most are protected against decay in one way or another. The current situation is a cause for concern as biological collections form the cornerstone of taxonomic research. Without adequate staff and active curation, the collections will become less useful and important specimens may be lost. The fact that very few biological collections in Africa are electronically databased further hampers taxonomic research as it impairs the dissemination of information on African taxa;

(e) *Projects.* Most projects that have been conducted in African countries have been done on vascular plants and invertebrate animals. Several projects have also been conducted on vertebrate animals and nonvascular plants, fungi being the most neglected. Many of these projects have been associated with existing networks. The conclusions that can be drawn from this section of the questionnaire support the general trend worldwide. In the past, most taxonomic work was done on the larger species of fauna and flora and the micro-organisms were largely neglected. Thanks to the efforts of BioNET-INTERNATIONAL this situation has much improved as far as invertebrate animals are concerned. However, much work still needs to be done on nonvascular plants and especially fungi;

(f) *Collaboration.* Collaboration between institutions and countries is always desirable and most of the countries indicated that they collaborated with other institutions in their region or with Northern institutions. No single country can be expected to have experts on every taxon. It is therefore very important to collaborate with other countries in the region to be able to address taxonomic problems fully. An important aspect in this regard is co-operation in the training of personnel and exchange of experts. There is a call to prioritise strengthening of regional and subregional networks for taxonomy, regional collaboration and regional and subregional training programmes. These sentiments expressed in the GTI programme of work were also very strongly supported by the decisions taken at the GTI Africa regional workshop. It was felt that existing networks should play a key role in implementing the GTI and that the networks should be expanded to include countries not currently covered by, for instance, the LOOPs of BioNET-INTERNATIONAL;

(g) *Staffing.* Most countries indicated that the number of taxonomists practicing in their country was not adequate to address diversity issues. The lack of staff was also shown to be one of the major stumbling blocks preventing progress in the taxonomic effort in African countries;

(h) *Teaching of taxonomy.* Human capacity-building is a major area of concern. Most countries indicated that taxonomy was taught to some extent at universities and colleges in their country. Six countries indicated that taxonomists were trained at foreign institutions only. The curriculum is revised mostly every ten years, meaning that most of the courses are probably somewhat outdated. The GTI POW recognises that human capacity-building requires major increases in training programmes for taxonomists and parataxonomists throughout the world;

(i) *Infrastructure.* Sufficient infrastructure is lacking in most African countries. Equipment necessary for taxonomic study is available in most of the countries, but is generally by far inadequate;

(j) *Inventories/Floras.* Very few countries indicated that inventories of all groups of organisms had been completed, and then that many of them were inadequate. All other countries have done inventories for at least one group of organisms. Most existing inventories have been done for

vascular plants and vertebrate animals. Some countries have done inventories for invertebrate animals and nonvascular plants, but very few countries have done inventories for fungi. This emphasises the fact that in the past most work was done on larger organisms and that there is a great need for work to be done on micro-organisms;

(k) *Priority taxa.* Some countries have identified priority taxa on a national and regional level. Most countries have also listed taxa that should be considered as priority taxa. Most of the priority taxa already listed are vascular plants and invertebrate animals. Only a small number of vertebrate animals and very few fungi and nonvascular plants have been listed;

(l) *Taxonomic information.* Taxonomic information is available to some extent in most countries, mostly as hard copies. In many cases it was indicated that the information was not adequately distributed. Some by-products of taxonomic studies are available in most countries, but are also not well distributed. This is a major cause for concern as taxonomic information and by-products from taxonomic studies are vitally important to successful research. Owing to the great amount of work done by early explorers in Africa and the research still being carried out on African taxa by Northern institutions, vast numbers of African specimens are housed in Northern collections. Only a few countries indicated that specimens housed in Northern institutions were easily accessible. Most countries indicated that they did not have easy access to these specimens. This is something that needs to be addressed, as it is very difficult to do proper taxonomic research on taxa without access to types and other important specimens;

(m) *Stumbling blocks.* The three major stumbling blocks in preventing progress in taxonomic effort in Africa are institutional running costs, lack of staff and lack of project-related research funding;

(n) *Conclusion.* This needs assessment highlights the prominent taxonomic impediment currently existing on the continent and is aimed at, among other things, informing policy makers and scientists alike as to the dire need for supporting systematics in Africa. Taxonomic capacity-building is urgently needed in Africa and African taxonomic institutions can therefore benefit immensely from the Global Taxonomy Initiative as part of the African Renaissance;

20. The participants of the African regional meeting, representing 23 African and 9 other countries, also produced the Kirstenbosch Declaration on Implementing the GTI in Africa, which recommends that:

(a) The Conference of the Parties assure core funding exists for a GTI Programme Officer at the Convention Secretariat;

(b) Parties designate GTI national focal points and participate in the development of regional networks as rapidly as possible, in accordance with decision V/9 of the Conference of the Parties;

(c) Parties establish and strengthen national and regional centres of excellence in taxonomy as rapidly as possible, in accordance with decision IV/1 D of the Conference of the Parties;

(d) Parties support and expand the taxonomic needs assessment exercise initiated as part of this workshop;

(e) Parties support and expand current national and regional taxonomic capacity-building initiatives;

(f) Parties support existing African national and regional networks that promote the implementation of GTI, for example SABONET, AETFAT, BOZONET, and WAFRINET, SAFRINET and EAFRINET of BioNET-INTERNATIONAL;

(g) Parties promote and support South-South and North-South partnerships where these contribute to GTI objectives for Africa;

(h) The Convention Secretariat disseminate GTI information in appropriate media and languages, bearing in mind that many countries lack access to the World Wide Web;

(i) Parties and donors facilitate and provide funds for GTI activities, as acknowledged by decision IV/1 D of the Conference of the Parties;

(j) The Executive Secretary of the Convention on Biological Diversity and the GEF together provide clear instructions on the relationship between GEF and GTI, including ways and means of simplifying the funding of GTI activities.

21. Preparations are currently underway for regional GTI workshops in East Asia and North America, and donors to support these being sought.

22. A preliminary meeting of representatives of European taxonomic institutions took place in Amsterdam on 20-21 October 2000, funded by Fauna Europaea; the report from this meeting will be sent to the European Commission as a possible basis for a Regional Assessment; other meetings may take place with a wider constituency.

23. Presentations on the GTI and discussions on its implementation have taken place in a number of other institutional, national, regional and global meetings.

24. A workshop is planned for July 2002 in conjunction with BioNET-INTERNATIONAL entitled "Partnerships for demand-driven taxonomic capacity building". A major aim of this meeting is to identify taxonomic needs, in the context of the Convention on Biological Diversity, determine priorities, and propose strategies for addressing them.

B. Progress in the establishment of the GTI Coordination Mechanism

25. In decision V/9, the Conference of the Parties established a GTI Coordination Mechanism to assist the Executive Secretary in facilitating international cooperation and coordinating activities under the GTI. In June 2000, the Executive Secretary wrote to all national focal points requesting country nominations for representatives for the GTI Coordination Mechanism by 28 July 2000, and by 8 September 2000 the Secretariat had received 62 nominations from 48 countries. The Executive Secretary also invited, in accordance with the decision, United Nations Environment Programme (UNEP), United Nations Educational, Scientific and Cultural Organization (UNESCO), Food and Agriculture Organization of the United Nations (FAO), the International Council of Scientific Unions (ICSU), Global Biodiversity Information Facility (GBIF), Global Environment Facility (GEF) and BioNET INTERNATIONAL to be represented on the coordination mechanism, as well as an indigenous peoples' representative.

26. The GTI Coordination Mechanism met at the seat of the Secretariat of the Convention on Biological Diversity on 23 November 2000, to assist in the work on the Global Taxonomy Initiative, as agreed by the Conference of the Parties in decision V/9. The meeting was attended by experts from 10 countries (Canada, China, Costa Rica, France, Jamaica, Japan, Kenya, Namibia, Netherlands, Russian Federation), as well as participants from BioNET International, DIVERSITAS, FAO, GBIF, the SBSTTA Bureau, and an indigenous peoples' representative.

27. The meeting mostly addressed the draft programme of work for the Global Taxonomy Initiative prepared by the Executive Secretary (UNEP/CBD/SBSTTA/6/10). The meeting also discussed

mechanisms to improve international cooperation and coordination specifically with regard to implementing the GTI in line with other activities under the Convention.

28. The Coordination Mechanism emphasized that biological species do not observe national boundaries, and can only be understood and sustained if their variation can be studied and assessed in the natural habitats throughout their entire geographic range. Much taxonomic research depends on transnational activities and international cooperation involving joint fieldwork, travel of personnel, and the frequent exchange of data, samples, and biological specimens. The Coordination Mechanism noted the need to facilitate international cooperation for taxonomic research by *inter alia* granting the necessary permissions for approved research projects, field work, collection of biological specimens, and free exchange of personnel, data and relevant materials.

29. Since the first meeting the members of the Coordination Mechanism have, together with the Acting Programme Officer, participated in discussions via an e-mail listserv set up by the Secretariat. Discussions have focussed on assessment procedures for the pilot project proposals submitted, and the development of the GTI as a forum to promote the importance of taxonomy and taxonomic tools in the implementation of the Convention.

30. Some members of the Coordination Mechanism were present at the sixth meeting of SBSTTA in Montreal in March 2001, and met briefly to consider progress of the GTI.

31. Members of the Coordination Mechanism have attended both GTI regional workshops, are involved in the preparation of the two workshops in the planning stage, and have been present at many of the meetings where the Secretariat has been represented in order to promote and discuss the GTI.

32. A second meeting of the Coordination Mechanism is being planned for July 2002.

C. Progress in developing a programme of work for the GTI.

33. In its decision V/9, the Conference of the Parties requested the Executive Secretary, with the assistance of the GTI Coordination Mechanism, to draft as a component of the strategic plan for the Convention on Biological Diversity a work programme for the Global Taxonomy Initiative (GTI) defining timetables, goals, products and pilot projects. The Executive Secretary prepared a draft programme of work on the Global Taxonomy Initiative and submitted it to the sixth meeting of the SBSTTA.

34. SBSTTA discussed the draft work programme and following some additions and amendments had submitted it to the Conference of the Parties at its sixth meeting for endorsement (recommendation VI/6, annex).

35. The draft work programme consists of five operational objectives designed to address the multi-faceted nature of the problems of insufficient knowledge of all components of biological diversity and the lack of taxonomic capacity, through activities at global, regional and national levels. These objectives are intended to be mutually reinforcing and to be implemented in parallel.

D. Progress in submission and evaluation of pilot project proposals

36. In paragraph 2 (e) of its decision V/9, the Conference of the Parties urged Parties, Governments and relevant organisations to communicate to the Executive secretary, by 31 December 2001, suitable programmes, projects and initiatives for consideration as pilot projects under the Global Taxonomy Initiative.

37. Twenty-two programmes, projects and initiatives were submitted by various Parties and organizations, namely:

(a) Development of an information-provision system for a hyper-diverse insect group. (CSIRO Division of Entomology, Canberra, Australia; Major Systematic Entomology Facilities Group (MSEFG); The Natural History Museum, London)

(b) The Global Butterfly Information System (Peru; Major Systematic Entomology Facilities Group (MSEFG); The Natural History Museum, London)

(c) Distribution patterns of pest and beneficial termites: gathering collection data in an agrobiodiversity context (International Centre of Insect Physiology and Ecology (ICIPE), Kenya; Major Systematic Entomology Facilities Group (MSEFG); Smithsonian Institution, USA; BioNET-International; The Natural History Museum, London)

(d) Checklist of Afrotropical Insects (International Centre of Insect Physiology and Ecology (ICIPE), Kenya; Smithsonian Institution, USA.)

(e) Mapping African Dragonfly Diversity (Invertebrate Conservation Research Centre, South Africa, International Centre of Insect Physiology and Ecology (ICIPE), Kenya, Major Systematic Entomology Facilities Group (MSEFG), Smithsonian Institution, USA.)

(f) Building capacity in taxonomy through the Species Plantarum: flora of the world. (Consortium of Parties and Institutes led by Slovak Republic)

(g) Data-bank of images of Neotropical moths (Smithsonian Institution, USA; The Natural History Museum, London.)

(h) Establishment of Sub-Regional Technical Cooperation Networks (BioNET-International.)

(i) Taxonomic initiatives for conservation and sustainable use of biological diversity: national to global capacity building, using India, Mongolia and Morocco as regional focal examples. (UNESCO, Morocco, India, and Mongolia.)

(j) Taxonomic initiative in Morocco. (Institut Agronomique et Veterinaire Hassan II, Morocco.)

(k) Flora of Ethiopia. (The National Herbarium, Ethiopia.)

(l) Networking Latin American systematists to generate a practical taxonomic product. (INBio, Costa Rica; The Natural History Museum, London.)

(m) Use of a small family of insects as a model for transferring museum data to end users in the field using information technology. (Oswaldo Cruz Institute, Brazil.)

(n) National Strategy and Action Plan for Taxonomy in the Philippines and an assessment of national taxonomic capacity (Philippines)

(o) Conserving the biodiversity of flagship plant groups of Southern Africa – a programmatic approach to taxonomic capacity building (South Africa.)

- (p) Arthropods of Economic importance. A proposal for a EuroLOOP/SAFRINET (BioNET-INTERNATIONAL) cooperation (BIOnet-INTERNATIONAL.)
- (q) Taxonomic study of the Nigerian climbers (Nigeria)
- (r) Capacity-building in taxonomy for the ASEAN region in support of biodiversity conservation, management and sustainable development (ASEANET).
- (s) Strengthening taxonomic capacity for biodiversity identification, use, conservation and management in West Africa (WAFRINET).
- (t) Programa nacional de fortalecimiento de capacidades y servicios taxonomicos para el inventario de la megadiversidad biología del Peru. (FMAM, Peru)
- (u) Coastal Biodiversity of Ranong (EU, Thailand, UK)
- (v) The FLOW Project ('Fulgoromorpha Lists On the Web') (MSEF (multinational))

38. The GTI Coordination Mechanism has developed an objective review system, and is engaged in assessing the proposals prior to making recommendations to the Executive Secretary on their suitability.

E. Progress in designation of national GTI focal points

39. In paragraph 4 of decision V/9 the Conference of the Parties requested all Parties and other Governments to designate a national Global Taxonomy Initiative focal point by 31 December 2000, linked to other national focal points, and participate in the development of regional networks to facilitate information-sharing for the Global Taxonomy Initiative.

40. As of 12 March 2002 thirty-eight countries and three organizations had designated focal points. These are: Antigua and Barbuda, Australia, Austria, Bahamas, Bahrain, Belgium, Cameroon, China, Colombia, Costa Rica, Croatia, Djibouti, Dominican Republic, Estonia, France, Grenada, India, Ireland, Japan, Kenya, Madagascar, Mauritius, Mexico, Namibia, Netherlands, New Zealand, Pakistan, Peru, Poland, Seychelles, Slovakia Republic, Sweden, Switzerland, Thailand, Turkey, United Kingdom of Great Britain and Northern Ireland, Zimbabwe, GBIF, the United Nations Environment Programme (UNEP), the Food and Agriculture Organization of the United Nations (FAO).

F. Progress on the Suggestions for Action made by the fourth Conference of the Parties: assistance for the Executive Secretary

41. In paragraph 1 of the Suggestions for Action in its decision IV/1 D, the Conference of the Parties suggested that the Executive Secretary should, as a matter of urgency, seek means outside of core funding of the Convention, to appoint a Programme Officer with appropriate operational resources to have responsibility for the further development of a Global Taxonomy Initiative, through the network of existing global, regional and national relevant institutions and organizations.

42. On the basis of the suggestions for action of the Conference of the Parties, the Executive Secretary obtained external funding from Australia and Sweden, enabling a Programme Officer to be employed full-time from December 1999 to November 2000. Following that, further donations were received from the United Kingdom and Sweden, and an Acting Programme Officer was engaged full-time from January 2001 to March 2001 and part time from April 2001 to the present time.

43. Additional support, enabling the Acting Programme Officer to represent the Executive Secretary at appropriate meetings and workshops, has been given by the Natural History Museum (United Kingdom), the British Council (United Kingdom), the Smithsonian Institution (United States), Missouri Botanical Gardens (United States), the United States Geological Survey, Species 2000 Asia-Oceania (Japan), Academia Sinica (China) and BioNET-INTERNATIONAL.

44. Members of the Coordination Mechanism of the GTI in their first meeting (November 2000) expressed great concern that the current budgetary constraints within the Secretariat precluded the continued employment of a GTI Programme Officer. The meeting recommended that the Conference of the Parties urge Parties and governments to promptly consider possibilities to assist the Secretariat by allocating permanent funds of this position, or through secondment of personnel.

45. As noted above, the participants of the African regional meeting also recommended in the 'Kirstenbosch Declaration' that the Conference of the Parties assure core funding exists for a GTI Programme Officer at the Convention Secretariat.

46. At its sixth meeting, SBSTTA requested "the Conference of the Parties to investigate methods for enabling the permanent support for the post of Programme Officer for the Global Taxonomy Initiative and for a yearly meeting of the Coordination Mechanism of the Initiative." (recommendation VI/6, para. 2).

III. METHODS OF IMPLEMENTATION OF THE GTI

47. The fifth meeting of the Conference of the Parties, in paragraph 6 of its decision V/9, recognized the importance of promoting awareness of the Global Taxonomy Initiative, by requesting the financial mechanism to continue promoting awareness in its outreach activities, such as the Capacity Development Initiative and the country dialogue workshops.

48. In paragraph 3 of its recommendation VI/6, SBSTTA requested the Executive Secretary, with the assistance of the Coordination Mechanism, to provide information to Parties and Governments on the process for developing projects, including pilot projects, aimed at implementing the programme of work.

49. Participants in workshops on the GTI, or in which the GTI is discussed, have indicated the need for further information on implementation, including clarification of roles of the Convention Secretariat, GEF, national Governments and individual taxonomists.

50. Among key clarifications needed by participants at meetings have been:

(a) That the Global Taxonomy Initiative is a part of the Convention on Biological Diversity, and exists in order to enable provision of the taxonomic resources, skills and information necessary for implementation of the Convention;

(b) As a result of this taxonomic impediment needs under the GTI must be identified in the context of Convention-related activities;

(c) The GTI encompasses all of biodiversity, including animals, plants and micro-organisms;

(d) The role of the Convention on Biological Diversity is to highlight issues and agree activities necessary to address them, and provide a political and legal framework through which such activities can be facilitated, both politically and financially;

(e) The Convention on Biological Diversity and its Secretariat is not a funding body, and nor can it act as an intermediary between those planning a project and a funding body, such as the GEF;

(f) Through the Convention process, particularly the SBSTTA and the Conference of the Parties, Parties can raise and gain international support for GTI priorities; they can also provide guidance for the financial mechanism of the Convention, operated by GEF;

(g) In developing projects and programmes that meet needs identified under the GTI, proposers should contact the national focal point for the Convention or the GTI in their country, or the country in which the work is to take place, for guidance. National Focal Points and their contact details are listed on the Convention website;

(h) If the financial mechanism is to be asked for funding, the national operational focal point of the GEF should be contacted (contact details given on the GEF web site), and also the focal point of the appropriate Implementing Agency (e.g. the World Bank, UNDP or UNEP);

(i) The pilot project proposals requested by the Conference of the Parties in decision V/9 are required in order to demonstrate methods of involving taxonomic work in the implementation of the Convention, and illustrate the functioning of the GTI;

(j) In its decisions III/10, IV/1 D and V/9 the Conference of the Parties has made a number of strong statements about the importance of taxonomy and many important recommendations; the taxonomic community would be well advised to examine these decisions carefully and seek their benefits. Decisions also include recommendations and requests to the GEF with regard to funding activities under the GTI;

(k) The GTI is fully participatory, and provides opportunities for the global taxonomic community to work together and with those in other sectors to support conservation, sustainable use and equitable access to the benefits of biological diversity.

51. As a partial response to this need a brochure on the GTI has been produced and is available for dissemination. This will be used for informing non-taxonomists of the need for and existence of the Global Taxonomy Initiative.

52. To meet the need more fully, and inform the various sectors of the function and operation of the Global Taxonomy Initiative, a Guide to the GTI has been drafted, and will be completed in the light of the decisions of the sixth meeting of the Conference of the Parties.

53. Elements of this Guide will include:

(a) Overview of the workings of the Convention on Biological Diversity, emphasizing its role providing a political and legal framework to support conservation, sustainable use and equitable access to the benefits of biological diversity;

(b) Overview of the role of funding bodies, in particular the financial mechanism of the Convention on Biological Diversity, operated by GEF, in providing resources for activities to implement the GTI in response to proposals from countries;

(c) Overview of the roles of Parties, other Governments and organisations in implementing the decisions of the Conference of the Parties, and the ways in which individual taxonomists and taxonomic institutes can participate in implementation of the GTI;

(d) Review of the rationale for implementing a Global Taxonomy Initiative to remove the taxonomic impediment;

(e) Mechanisms for implementing the work programme of the GTI, including methods of assessing taxonomic needs and impediments, options for capacity development, requirements for the GTI in terms of the thematic areas and cross-cutting issues of the Convention, and identification of pilot projects;

(f) Examples of projects and programmes implementing the GTI;

(g) Programmes and initiatives with links to the GTI;

(h) Examples of taxonomic tools of importance in implementing the Convention;

(i) Useful contacts and addresses.

54. In general any enquiry about the functioning or implementation of the Global Taxonomy Initiative may be addressed to the Convention Secretariat.
