



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"

C7.2.5 Terms of Reference for participation in first non-European ATBI+M pilot site

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Actual submission date: Month 28

Start date of project: 01/03/2006

Duration: 5 years

Organisation name of lead contractor for this component: Partner 12 - SMNS

Revision [End version]

Project co-funded by the European Commission within the Sixth Framework Programme (2002-2006)		
Dissemination Level ("X" in the relevant box)		
PU	Public	X
PP	Restricted to other programme participants (including the Commission Services)	
RE	Restricted to a group specified by the consortium (including the Commission Services)	
CO	Confidential, only for members of the consortium (including the Commission Services)	

Terms of reference for individual participation at the 1st non-European ATBI+M pilot site, Udzungwa Mountains National Park, have been drafted. The final version will be released once negotiations regarding fees for collecting permits and logistics at the National Park are concluded.



Terms of Reference

for individual participation in the "All Taxa Biodiversity Inventory + Monitoring" (ATBI+M) activities in the Udzungwa Mountains National Park, Tanzania, coordinated by EDIT WP7 and COSTECH on behalf of TanBIF.

1.1 General remarks

All individual staff and associates of EDIT and COSTECH partner institutions, as well as any other researcher or individual who will actively participate in the Udzungwa Mountains National Park ATBI+M, coordinated by EDIT WP7 and COSTECH on behalf of TanBIF, will be required to take note of the following Terms of Reference (ToR), and confirm his/her acknowledgement by signature.

In addition to these ToR, all participating researchers will be requested to take note of and comply with the Memorandum of Understanding (MoU) and/or any other agreement(s) between EDIT WP7 and COSTECH relating to the Udzungwa Mountains National Park ATBI+M.

1.2 The goals of the EDIT WP7 (ATBI+M) activities

EDIT WP7 organises biodiversity inventory and monitoring fieldwork for taxonomists in selected sites of conservation value, within and outside the European Union. In particular EDIT partner institutions are encouraged to support participation in ATBI+M activities by their staff and associates as part of their regular duties. However, all interested taxonomists and researchers are invited to participate under these ToR at designated ATBI+M sites. For their participation, EDIT WP7 offers limited support for travel and

accommodation to taxonomists. Additional funding and in kind contributions will be needed to cover full costs of the operations. Participants will benefit from general agreements and permits arranged for by EDIT WP7 and COSTECH, but taxonomists **will be required** to submit details about the groups to be studied, collection methods to be applied, and other specifics in advance. Participants will be assigned as members to international teams for carrying out short-term visits to the ATBI+M sites, with the main purpose to gather geo-referenced primary occurrence data for specific taxonomic groups of their expertise. By participating in EDIT WP7 activities, all researchers agree to share and hand over these primary occurrence data to local authorities and EDIT WP7 for integration into an ATBI+M database. The general goal to promote the free use of those data for biodiversity conservation, particularly by local authorities, and for further dissemination through digital information facilities (e.g. GBIF) should also be endorsed by all participants.

1.3 General conditions for individual participation

- Participants who take part in the Udzungwa Mountains National Park ATBI+M activities do so in their individual capacity and will not be employed or contracted for that purpose by EDIT or COSTECH. Consequently, EDIT and COSTECH do not assume any responsibilities of an employer or contractor, and participants must ensure that all conditions of participation and prevailing regulations are in agreement with their institutional or private employer;
- Participants should concentrate their activities within the designated ATBI+M site(s), but may extend their research beyond these core areas. In such cases, the individual researchers are fully responsible for making all necessary arrangements with relevant authorities concerning access and work permits, **and cannot expect any assistance or support from EDIT or COSTECH as specified in the MOU and these TOR;**
- EDIT WP7 and COSTECH are not responsible for individual travel or health insurance of participants, and will not accept any claims of loss of or damage to property or health during participation in ATBI+M activities.

1.4 Responsibilities of the individual participant:

- To take note of and conform with all relevant local legislation and regulations, as well as with the annexed guidelines for individual participation in ATBI+M activities;
- To conduct field work and to behave according to generally accepted standards of best practise and common sense;
- To observe and follow instructions from the EDIT WP7 and COSTECH management, from the respective site coordinators and team leaders, as well as from local authorities and relevant counterparts;
- To deliver primary occurrence data in an agreed digital format to the EDIT WP7 and COSTECH management directly or indirectly through team leaders, site managers or scientific coordinators (for details on data formats, see annexed guidelines for participation);

- To agree that the primary occurrence data delivered will be made publicly available through open access systems (e.g., via the GBIF network), and that such data can be consulted and used by relevant authorities, nature conservation organisations, and other third parties, with due attribution of credit;
- To provide additional information about specific organisms of national heritage value and their conservation needs if appropriate and/or required by COSTECH or local authorities;
- To collect always in a responsible and respectful manner with minimal impact on the habitat and environment;
- To generally deposit voucher specimens within relevant EDIT and COSTECH institutions, unless previously agreed otherwise in the relevant Material Transfer Agreement (MTA), while accepting that the deposition of holotypes will be subject to special regulations;
- To publish species descriptions and other relevant information preferably in open access format or with publishers who allow access to PDF-files without additional charges;
- To make available other results from his/her research undertaken at the ATBI+M site(s) and disseminate to EDIT WP7, COSTECH, and relevant partner institutions.

1.5 Responsibilities of EDIT WP7:

- To provide financial support within agreed terms and limits for local transportation, meals and accommodation during participation in the Udzungwa Mountains National Park ATBI+M (for details, see annexed guidelines);
- To facilitate the arrangement of relevant permits for individual participants with COSTECH and other Tanzanian authorities;
- To provide general information about the designated ATBI+M site(s) and guidelines for inventory/monitoring work in the framework of this project;
- To provide guidelines for recording and geo-referencing of primary occurrence data, including digital templates for data capture;
- To facilitate on-line reporting of field activities and electronic publication of results of ATBI+M work;
- To establish and maintain data portal(s) for online presentation of primary occurrence data from ATBI+M sites, and to enable linkages of these data with open access systems (e.g. GBIF) and other relevant networks.

1.6 Responsibilities of COSTECH:

- To arrange for relevant permits, including annual research permit for the project and official permits for access to the ATBI+M site(s) for individual participants;
- To facilitate, if needed, a Material Transfer Agreement (MTA) between the individual participant and the relevant Tanzanian institution(s);
- To make primary occurrence data available to relevant authorities in Tanzania through the national biodiversity data portal or similar online open access systems, with linkages to relevant international networks (e.g. GBIF);
- To utilise and disseminate information about specific organisms of national heritage value in national as well as international outreach programmes.

Name: _____
Address line 1: _____
Address line 2: _____
Postal code and city: _____
Country: _____
Phone: _____
E-mail: _____

Hereby confirms that he/she has taken note of and agreed with these Terms of Reference:

[place, date] [signature]