



D1D2 - Update 2009 Annex 4

EDIT beyond 2011: an Institutional Vision

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As we consider the future of our common activities, several paths lay before us. Two things are for certain: we must not lose the expertise created within EDIT, and we must not miss the opportunity that is afforded us, right now, to band together to face the future. Many of us cannot compete, at our own national levels, with larger bodies concerned with other sciences. Others face difficulties maintaining their level of activity in the face of increasing demand for society-driven results, and need their partners' resources for expertise and research.

Principles:

Scientific integration, while essential, is not enough. There needs to be institutional structures that can act as an interface with the outside world and a reference point within the taxonomic community. That point was made clearly by the European Commission, by stakeholders and by our own scientific advisers.

We now face the difficult task of creating a structure that will be lasting, efficient and integral to the way we practice taxonomy by 2011. A balance must be struck between two principles. Some amount of centralisation is necessary for the efficient management of the system, and to provide a unique reference point for our stakeholders. But a network-based approach to the coordination of research is essential to preserve academic freedom and relevance, and should be at the core of the new institution's identity.

Functions:

There are several concrete ways in which a successor of EDIT can improve the quality and quantity of our taxonomic knowledge. While not all of these options can be pursued at the same time, they are all areas where improvement is necessary. Following our own version of the principle of subsidiarity, EDIT should focus on these areas of our work where the whole can be greater than the sum of its parts. These we identify in the following main areas:

Policy: Common decisions on policy objective, performance assessment, collections management policy, fundraising, staff exchange.

Interface with society: Helping stakeholders identify valid partners (and vice-versa), lobbying, response to society's needs, communication targets, unified message towards decision-makers and the general public, interface with the business community.

Research management: Common research projects, shared infrastructure (sequencing, imaging, etc.), common IT tools and platforms, rationalised efforts for taxonomic inventory and monitoring in the field, coordinated responses to calls for tender, massive combined collecting campaigns, improved standards, capacity-building with partners in other countries, improved access to taxonomic data for use in conservation research, common policy in collecting and storing of specimens, rationalisation of new collections.

Training: Unified and competent training at the European level, training other scientists to use/recognise taxonomy, capacity-building in megadiverse countries.

Structure :

The structure of an EDIT successor would therefore be based on the following types of elements:

Secretariat including Executive secretary: This would be the central management and reference point for the body. It would take over or coordinate duties including PR, lobbying, dispatching of various tasks to member institutions, allocation of seed money, collaboration with major programmes (GBIF, EoL), coordination of the various task forces (see below), and possibly management of common projects with specific support and partial participation.

Board of Directors: the directors of the member institutions, responsible for elaborating the long-term view and policy of the Institute, making strategic decisions, agreeing on the common actions and implementing the latter at institutions level. In turn, they can designate an **“Executive Committee” of Directors:** A few representatives from the Board of Directors who would take responsibility for formulating consensus strategy, constituting the interface between the Board of Directors and the secretariat.

Task Forces and committees: The majority of the work of the EDIT successor will be performed by task forces assembled from the staff of member institutions, or coordinated by ad hoc committees. They will benefit from the support of their home institutions and coordination mechanisms supported by the executive office. They may be temporary but can also take responsibility for long-term missions; in this case, they can be based permanently within a member institution or can benefit from an independent position. These include the task forces who will actually go in the field on coordinated inventory missions, devise and implement collecting protocols, answer calls for tenders from funding bodies, perform quick and wide taxonomic revisions, etc.

Legal basis :

There are several options for the legal statute of an EDIT successor. The lowest level of coordination will be ensured by a series of **ad hoc agreements (MoUs) covered by a renewed Consortium Agreement** (which can itself be a MoU). While these provide maximum flexibility, they require separate Memorandums of Understanding for each project or field of activity, which is how EDIT is processing now. This may become extremely complex and cumbersome, and will never constitute strong means for common action. At the opposite end of the spectrum, a new **Institute** based in a European country will have almost entirely free rein in its scientific choices, but will find trouble collating funding and cooperation.

More moderate choices would be either an **association** model, which may help to encourage dialogue, or a **foundation** model, more appropriate regarding funding and management matters, and will leave flexibility while remaining efficient.

It has to be noted that not all European institutions have to be part of this EDIT successor. Indeed, it may be more efficient if the core membership is made of the more motivated members, able to invest some significant effort in the common structure (under the condition of a high probability for return on their investment). The grouping of (almost) all major institutions, for purposes of representation and discussion, already exists as CETAF and should remain as such to maintain the benefit of networking at the present level.