

Intergovernmental Oceanographic Commission
Reports of Meetings of Experts and Equivalent Bodies

IODE Steering Group for OBIS (SG-OBIS)

Ad-hoc online meeting

30 May 2024

UNESCO

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1. Opening of the meeting and adoption of the agenda

The SG-OBIS ad hoc online meeting was opened by Katherine Tattersall, SG-OBIS Co-Chair. The meeting was attended by 33 participants representing 21 OBIS nodes and OBIS secretariat (list of participants in annex 2).

Attendees were welcomed warmly and advised that the meeting will be held in two sessions to accommodate different time zones of SG members who are joining online, and that the agenda and information shared in both sessions will be the same.

Katherine Tattersall asked whether there are any other agenda items to be put forward.

The SG-OBIS adopted the agenda for the meeting without changes.

2. Status work plan and budget

Mr Ward Appeltans, OBIS programme manager introduced this agenda item. The SG-OBIS-12 adopted many action items, which are listed in Annex 1. The IODE secretariat recently requested the OBIS secretariat to provide a status update on the implementation of the work plan by June 3, 2024, specifically detailing the financial resources allocated to OBIS and indicating whether there will be any balance of unspent funds. So far, the activities that require a budget are on track (see table below). The costs of the SG-OBIS-12 (staff + co-chair travel) was higher than planned (20K USD instead of 15K), which means we will have less for 2025.

	2024	2025	Status
SG-OBIS-12	20000 US\$		Was 15K, but more expensive
SG-OBIS-13 + All Hands		50000 US\$	In progress, 5K less because of SG-OBIS-12
OBIS data/product coordination workshop	20000 US\$	20000 US\$	In progress
OBIS consult Community Engagement Officer	30000 US\$	30000 US\$	In progress
Technical infrastructure	15000 US\$	20000 US\$	Cloud is 7.5K/year which will increase to 10K with the upgrade of Elasticsearch and JupyterHub.+ subscriptions to

			Notion, GitHub, and books and laptops.
Branding	5000 US\$	5000 US\$	Not started

The SG-OBIS requested the secretariat to develop a proposal regarding branding material and seek input from the OBIS nodes. The following members expressed interest to be involved: Martha Vides (OBIS Colombia), Dan Lear (OBIS-UK), Jon Pye (OTN-OBIS), Steve Formel (OBIS-USA).

3. Election of SG-OBIS Co-Chair

On 19 March 2024 and 6 May 2024, the OBIS Secretariat made a formal call for nominees for Co-Chair of the SG-OBIS, by email to the SG. Candidates could self-nominate or nomination could be made on behalf of another candidate. It was requested that any nominee gain the full support and endorsement of their host institute before this meeting and notify the OBIS Secretariat in writing prior to the meeting.

The role of SG-OBIS Co-Chair is described in the TORs that were endorsed by SG members during SG-OBIS-12 in March 2024 (see SG-OBIS-12 meeting report section 4.1.4: <https://oceanexpert.org/document/34335>).

The Secretariat received one self-nomination prior to the commencement of this ad hoc meeting.

Dan Lear (OBIS UK node manager) said: “I am pleased to submit my expression of interest to undertake the role of OBIS Co-Chair.

I have been involved in standards-based marine biodiversity data management for over 25 years, at the national, European and global scales and it would be a great honour to contribute my expertise to continue the growth and development of OBIS and the wider community. Throughout my career, I have leveraged technology and data to drive innovation and make a positive impact. At the Marine Biological Association (MBA), I lead both the IT and Data & Information Teams, overseeing the coordination of DASSH, the UK node of OBIS, founding partner of iNaturalist UK and accredited data centre for marine biodiversity data. Under my leadership, we have achieved significant milestones, including the open publication of over 6 million records of marine species and habitats, attainment of CoreTrustSeal accreditation, integration of eDNA, habitat & imagery data, and the development of robust data governance policies and procedures.

I oversee the MBA’s contribution to large pan-European data-centric initiatives, including the current DTOBioFlow and MARCO-BOLO projects and EMODNet Biology, leading several key work packages and tasks, and am responsible for the management and publication of the

Continuous Plankton Recorder dataset, the longest running, most geographically extensive marine ecological survey in the world.

Additionally I am currently chair of the UK Biodiversity Data & Information Group (BioDIG), Co-Chair of the MEDIN Data Archive Centre Working Group and am an active member of the existing OBIS Steering Group. In these roles I foster a culture of collaboration and innovation, driving cross-functional teamwork to achieve common goals aligned with and in support of UK, European and global policy development. Additionally I act as data lead and liaison to the UK Government's Healthy and Biologically Diverse Seas Evidence Group (HBDSEG), part of the Marine Monitoring and Assessment Strategy, which aims to deliver transparent, evidence-driven indicators for the state of UK and European Waters in support of the UK Marine Strategy, the OSPAR Convention and the EU Marine Strategy Framework Directive.

In terms of community engagement and communication I have organised and coordinated numerous workshops and meetings on an international scale, liaising with national policy leads, industry bodies, academics, NGO's and wider civil society. I am adept at communicating complex, technical issues to non-specialists and ensuring the development of a common understanding and shared approaches.

I hope you will consider my expression of interest favourably, and I can confirm that I have the full support of the MBA, as my employer in this application.

Best wishes, Dan

The OBIS-SG Chair, Katherine Tattersall, puts to the SG that this nominee be appointed unopposed as Co-Chair of the SG-OBIS.

The SG-OBIS welcomed and accepted the appointment of Mr Dan Lear as Co-Chair of the SG-OBIS.

4. Membership SG-OBIS and Coordination Groups

At SG-OBIS-12, we established an intersessional working group: IWG-SG-Membership, to determine the process by which Nodes can self-nominate for the SG (see SG-OBIS-12 meeting report section 4.1.3 for SG TORS), ensuring representation and equity across Nodes. It was agreed that the outcomes of the IWG-SG-Membership work would be reviewed for adoption by the SG-OBIS in an online intersessional ad hoc meeting, following which there would be a call to all OBIS Nodes for commitment to join the SG-OBIS. The following nodes expressed interest in joining: OBIS-UK, AntOBIS, OBIS Malaysia, OBIS Canada, OTN, OBIS-AU.

The IWG-SG-Membership has not met yet.

Also at SG-OBIS-12, as part of a new structure for OBIS, three new OBIS Coordination Groups were endorsed. Possible initial activities for these Coordination Groups were collated during the meeting with work plans to be defined by the Coordination Groups once commenced. The SG agreed that the coordination groups would be established with the support of, and have ongoing secretarial support from, a new OBIS Community Engagement Officer who is yet to be appointed (see agenda item 6). The new structural groups will be the Nodes Coordination Group, the Data Coordination Group and the Products Coordination Group with TORs described in the SG-OBIS-12 meeting report section 4.1.6.

Katherine Tattersall suggested that to aid formation of the coordination groups and the work of the IWG-SG-Membership, the OBIS Secretariat prepare a template for a “letter of intent” in which OBIS nodes can express their intention to serve on the SG-OBIS as well as their intent to serve on the Data and Product Coordination Groups. If required, the IWG-SG-Membership will review the letters of intent in the initial step of determining the process for ensuring representation and equity across the Nodes in the SG-OBIS. If there are fewer SG nominations than seats available in the SG, then the urgency of the work of the IWG-SG-Membership is lessened. If there are more nominations than seats available then the work of the IWG is pressing and the IWG will be called to meet before the end of June 2024.

Once the Coordination Groups are formed and the Community Engagement Officer is in office, we can start the online meetings.

The SG-OBIS requested the OBIS Secretariat to prepare a template for a letter of intent and circulate it to OBIS nodes within the next 7 days in which OBIS nodes can indicate their commitment for the various groups (SG, Data Ccoordination and Product Coordination, IWG SG membership). In the template, OBIS nodes will be asked to indicate whether required host-organisation endorsement for SG membership has been gained or is pending.

The SG-OBIS requested the OBIS Secretariat to make a call for letters of intent with a due date of 30th June as agreed by the SG, following which the IWG-SG-Membership will meet to determine process for representation and equality across the Nodes.

5. OBIS Nodes

5.1. Certification for nodes staff

SG-OBIS-12 adopted a new TOR for OBIS nodes (see SG-OBIS-12 meeting report section 4.1.2), which states that “at least one staff member holds a current OBIS certification (completing recognized training OBIS/OTGA course “Contributing and publishing datasets to OBIS”) with a 12- month grace period for acquiring said certification after a Node is established.”

The first intake OBIS training course on OceanTeacher concluded earlier this year, with a high subscription rate. However, only six OBIS nodes now have at least one staff member who has completed the comprehensive training course.

In order to accommodate staggered enrolments, the training course has been converted to a different format with some assignments auto-graded. The need for instructor grading and feedback will be reduced for those enrolling in the course on an as-needed basis. Lesson chapters are restructured to be in book format, simplifying navigation and making offline reading easier. The reformatting of training was completed before the end of May 2024 and registrations for enrolment, managed by the Secretariat, will open in June 2024.

In order to express interest in enrolling, please contact the OBIS Secretariat. Candidates must have an [OceanExpert](#) account and have accessed the [OTGA](#) platform.

The SG-OBIS requested OBIS nodes that still do not have at least one staff member with an OBIS certification should complete the training before the end of 2024.

The SG-OBIS requested that the OBIS Secretariat define what recognition is available for previous engagement with the training course (e.g., reviewing the material, partial completion earlier in 2024) and that information about this recognition to be circulated by email to OBIS nodes. A pathway for recognition for prior engagement will be offered.

6. OBIS Community Engagement Officer

The SG-OBIS-12 agreed that an OBIS Community Engagement Officer position (consultant) be created to support the organization of the Coordination Groups (Data, Products, Nodes), the establishment of partnerships and to engage in outreach and communication activities.

The SG-OBIS requested the OBIS Secretariat and Co-Chairs to finalize the Terms of Reference of the OBIS Community Engagement Officer and launch the vacancy before the end of June 2024.

7. OBIS Meetings

7.1. Living Data 2025

GEO BON and TDWG will jointly organize a big (estimated 1,000 participants) biodiversity data conference in Bogota, Colombia, at the end of October 2025 and have invited GBIF and OBIS to be co-organizers. GBIF is currently considering having their Governing Board and Nodes Committee meeting back to back with this conference, hosted by Colombia.

Mr Ward Appeltans asked UNESCO HQ what the requirements are for UNESCO entities co-organising a conference in terms of liability. The response is that we can be a co-organizer but we cannot be mentioned on official invitation letters.

The SG-OBIS agreed that OBIS is a co-organizer of the Living Data 2025 conference.

The OBIS Secretariat asked OBIS nodes to help with the planning and programme development. Those interested in engaging with the conference planning should contact the OBIS Secretariat.

7.2. SG-OBIS-13 and 1st OBIS All-hands meeting

On 6 May 2024, the OBIS Secretariat made a formal call for hosts of the SG-OBIS-13 and the first OBIS All-hands meeting, by email to the SG.

The current proposal is to have 2 or 3 days of All-hand intensive workshops followed by a 2-day official SG meeting. The All-hands meeting will be open to the broad OBIS community including node managers and staff and the SG meeting will be for SG members only (see section 4.1 IWG-OBIS-Structure in the SG-OBIS-12 meeting report). OBIS has a budget of 40K USD for travel grants, to ensure nodes from developing countries can participate, but we do not have funds for local costs (catering, rooms, commute) which should be covered by the local host. We hope we can attract around 100 people to the OBIS All-hands meeting, and expect around 25 for the SG meeting.

There are three options:

- Option 1: SG-OBIS + Living Data 2025 (instead of all-hands) in Bogota end of Oct 2025
- Option 2: SG-OBIS + OBIS All Hands meeting in Ostend (5-9 May 2025 - celebrating 25 years of OBIS) - possibly co-hosted by EurOBIS and AntOBIS
- Option 3: SG-OBIS in Ostend (8-9 May 2025) and OBIS session at Living Data 2025 (instead of all-hands) in Bogota end of Oct 2025

The SG-OBIS requested more time for reflection and re-opened the call for proposals to host the SG-OBIS and OBIS All-Hands meeting until 25 June followed by one week for feedback, via email, from SG-OBIS to inform a final decision.

7.3. OBIS workshop 2024

OBIS has US\$20,000 in 2024 to hold a workshop supporting the data or product coordination group.

Mr Ward Appeltans, OBIS Programme Manager, suggested organizing a BioEco EOVS data standards workshop. The BioEco panel is currently revising and updating the EOVS specification

sheets and the secretariat receives many requests in supporting the panel experts in developing data format and data standard guidelines. The workshop could be held back-to-back with a GOOS BioEco panel meeting, which is proposed to be organized in the second half of 2024 (co-funded by EU BioEcoOcean project).

The SG-OBIS delegated the decision for the OBIS workshop 2024 to be taken by the OBIS management group.

7.4. OBIS session at SPNHC-TDWG 2024

SPNHC and TDWG are holding a joint conference in Okinawa, Japan, in September 2024. The OBIS community proposed a session that has been accepted as SYM36 “Lessons Learned from Local Data Providers in the Marine Community: DwC data connect local to global” with session organisers Takashi Hosono, Ward Appeltans, Katsunori Fujikura and Katherine Tattersall. There are four presentations proposed for the session. Sachit Rajbhandari (OBIS Australia) and Yi-Ming Gan (AntOBIS) will attend in-person. Katherine Tattersall and members of EurOBIS will attend online. Other members of the OBIS community are encouraged to attend in person or online.

8. Fundraising activities

8.1. Flanders-UNESCO Science Trust Fund

UNESCO launched a call for proposals to support the existing programmes under IOC and the Natural Science Sector as part of the 6th phase of the Flanders-UNESCO Science Trust fund (FUST). The deadline for concept notes was 24 May 2024 and full proposals by the end of June. The SG-OBIS-12 requested the Secretariat to submit the OBIS propagules project and potentially a project to support the OBIS products platform.

However, to avoid competition between the various UNESCO programmes, it was recommended by IODE that IODE programme components would instead develop a big project, jointly. The OBIS Secretariat is part of the proposal: *UNESCO Biosphere Observatories for Ocean Ecosystem Sustainability (BioES) - Enhancing Ocean Ecosystem Health and Resilience to Multiple Hazards in UNESCO marine and coastal Biosphere Reserves*. Other partners in the proposal are ODIS, OTGA, MSPGlobal, GOOS, IOC Ocean Science, IOCAfrica, IOCARIBE, UNESCO-MAB and if funded the project would have a duration of 4 years.

According to the current design of the joint proposal, in the first two years, OBIS will have some resources to further improve the OBIS tools and services, and in the last two years, OBIS will be involved in the research to develop information for marine spatial planning.

The concept note is currently under review.

The SG-OBIS welcomes a joint project with all IOC programmes and UNESCO's Man and Biosphere programme, with a focus on biological and ecosystem observations in UNESCO coastal and marine Biosphere reserves.

The SG-OBIS regrets that the propagules project will not be put forward for this round of funding but anticipates that other opportunities may arise.

9. Partnerships

9.1. Global Biodiversity Information Facility

On the 28th May 2024, we [formally announced](#) our joint marine strategy and action plan with GBIF. Two webinars (covering different time zones) will be organized on 13 June 2024 to inform the community.

To support OBIS nodes in communicating the strategy, the Secretariat and members of the OBIS community have drafted some conversation notes on what this joint strategy and action plan means in practice (see [here](#)).

The SG-OBIS recommended the SG membership to register for the webinars and contribute to the conversation notes document.

9.2. ProtectedSeas

In the 2nd edition of the IOC State of the Ocean Report (SToR), to be launched next week, we wrote a contribution under the chapter: Status and trends of marine life and focused on the conservation status of marine biodiversity. We created statistics on the total number of marine species, and those most vulnerable to extinction, within designated Marine Protected or Managed Areas (MPA), and what fraction of their habitat falls within those sites. For the boundaries and protection level of these MPAs we collaborated with ProtectedSeas. ProtectedSeas is an organization headquartered in Palo Alto, California and has been compiling ocean conservation regulations and protection measures into one open-access portal known as Navigator: <https://navigatormap.org/>.

ProtectedSeas would like to set up a partnership agreement with OBIS that allows the integration of data from OBIS and the MPA navigator and development of biodiversity statistics for MPAs.

The SG-OBIS agreed to establish a partnership agreement with ProtectedSeas and the following members expressed interest in following up on this cooperation: Stephen Formell (OBIS-USA), Martha Vides (OBIS Colombia) and Sheldon Carter (ISA OBIS).

10. Close of meeting

Mrs Katherine Tattersall closed the first session at 10:14 and closed the second session at 17:10 and thanked all participants.

The SG-OBIS thanked the Co-Chair and the OBIS Secretariat for organizing this ad-hoc online session.

Annex 1. Status of action items from OBIS Work Plan 2024

Action items	Type	Due Date	Responsible Party	Additional parties	Status
Develop speaking notes on OBIS-GBIF partnership to disseminate to Nodes	Communication	2024 April/May	OBIS Secretariat	GBIF	Green
Elect an OBIS co-chair	General	2024 May	OBIS Secretariat	OBIS Nodes	Green
Determine location/date of next SG + All Hands meeting, and catalogue offers from Nodes	General	2024 April/May	OBIS Secretariat	OBIS Nodes	Orange
Elect coordination group chair(s) and establish membership	General	2024 May	OBIS SG		Red
Determine SG membership process and establish membership	General	2024 intersessional ad-hoc SG	IWG-SG-Membership		Red
Generate concept notes for FUST applications, inviting partnership agreements with OBIS Nodes	Fund raising	2024 May	OBIS Secretariat	OBIS Nodes	Orange
* Invite OBIS nodes to join SMBD meetings, the first of which is April 10, 2024 * OBIS nodes apply for ROR codes to ensure work can be cited * Set up or suggest a space for OBIS node data mobilization	General	2024 April/May	Node Coordination Group	OBIS Nodes	Red
Define process by which OBIS nodes can complete online training within the next 12 months	Training	2024 spring	OBIS Secretariat		Orange
Create an OBIS Risk Register	Communication		OBIS Secretariat		Red
Investigate alternative cloud storage options as the need for storage will increase over time	Technical		Technical officer		Red
Review and agree upon OBIS vision, mission, objectives	General		OBIS SG		Red
	Fund raising	When needed	OBIS Secretariat		Orange
Develop and submit OBIS Propagules to upcoming FUST proposal, inviting OBIS node involvement	Fund raising	2024 June	OBIS Secretariat	OBIS Nodes	Red

Develop a project proposal involving OBIS Nodes to develop OBIS Products	Technical	2024 June	OBIS Secretariat	IWG-OBIS-PRODUCTS	
Submit the OBIS Data Policy as an annex to IOC Data Policy	Admin		OBIS Secretariat		
Suggest to IODE Management Group to consider adding OBIS support work as recognized activities	Admin		OBIS Secretariat		
Set up Mailman for OBIS coordination groups and investigate how the service can be used by OBIS nodes	Communication	2024 spring	OBIS Secretariat		
Appoint the OBIS Technical Coordinator as the TT-HAIS representative	Admin	2024 spring	Technical officer		
OBIS nodes to join JupyterHub for collaborative support and learning	Technical		Node Coordination Group	OBIS Nodes	
Develop guidelines for long-term archival of data	Technical		Data coordination group	Node Coordination Group	
Collaborate with GOOS and IODE for develop a work plan and budget to formally recognize the partnership	Admin		OBIS Secretariat	IODE, GOOS	
Delegate OBIS nodes to represent OBIS in relevant TDWG and GBIF groups	Technical		Data coordination group		
Develop an organisational chart of how OBIS fits into the IODE and IOC framework	General	2024 summer	Node Coordination Group		
Add informative tags to OBIS YouTube training videos	Training	2024 summer	OBIS Secretariat		
Map broad relationships for each node between OBIS, GBIF, institutions and governments	General	2024 fall	Node Coordination Group		
Create an OBIS umbrella package for R	Technical		Technical officer		
Align OBIS-controlled tools with broader biodiversity informatics community with respect to quality control tests and asserts, and recommend community tools align in turn	Technical		Data coordination group		
Share information on OBIS node tools and developments (perhaps add here to create/provide/determine a platform for this?)	Communication	2024 winter	OBIS Nodes	Node Coordination Group	

Develop and share a Github curated Data Management Template that can be used by OBIS nodes and the wider OBIS community	Technical		OBIS Secretariat		
Develop vocabulary training resources	Training	2024 fall	IWG Vocab team		
Document the history and evolution of OBIS nodes	General	2024 winter start	Node Coordination Group		

Annex 2. List of Participants

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