

Delivery protocol of the assessment drafts

To track compliance with the IPBES data and knowledge management policy

Version 3.0 (May 2024) - This document is for your internal use.

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Accompanied by a checklist  **Deliver protocol_checklist_v3.0**

INTRODUCTION

This protocol is intended as a guideline for technical support units (TSUs) submitting milestone drafts of the assessment to the IPBES secretariat. This protocol is **not** intended as a guideline for experts on how to prepare the drafts. This protocol is prepared based on the requirements articulated in the IPBES data and knowledge management policy¹, and a series of IPBES technical guidelines² and experience from previous assessment TSUs.

Comprising two sections, the protocol delineates the description below and a complementary checklist provided in Excel format. Tasks within the protocol are categorized for clarity and ease of management. Each task is assigned a milestone for completion³, along with identification of the responsible party.

At the end of the assessment, all items should be completed, unless specifically mentioned otherwise.

CATEGORIES OF TASKS

Chapters And Supplementary Materials

Summary For Policymakers

Figures And Tables

Delivery Of Data And Knowledge From Indigenous Peoples And Local Communities

Bibliographic References

Data Management Reports

Report's Front Matter, Annexes And Citations

Zenodo Final Upload (Cross-Categories)

IPBES Website And Notifications

External Review Materials

Media Outreach Materials

Factsheets

MILESTONES

Ongoing

Phase 1 corresponds to the start of the assessment (from its launch until the first author meeting). Every task described in Phase 1 should be completed by the first author meeting.

Phase 2 corresponds to the period between the first author meeting and the first external review. Every task described in Phase 2 should be completed by the first external review.

Phase 3⁴ corresponds to the period between the first external review and the second external review. Every task described in Phase 3 should be completed by the second external review.

¹ <https://doi.org/10.5281/zenodo.3551078>

² <https://ict.ipbes.net/data-management/technical-guidelines> and <https://ipbes.net/guideproduction-assessments>

³ Note that all deadlines have to be decided in consultation with the Secretariat

⁴ Phases 2 and 3 are merged for fast-track assessments

Phase 4 corresponds to the period between the second external review and the finalization of Plenary documents (eight weeks before Plenary, unless stated otherwise). Every task described in Phase 4 should be completed by the submission of Plenary documents.

Phase 5 corresponds to the period between Plenary and the launch of the final laid-out report. Every task described in Phase 4 should be completed by the launch of the final laid-out report.

RESPONSIBLE PARTIES

Assessment TSU

Data TSU

ILK TSU

Experts⁵

Secretariat

Graphic designer

CHAPTERS AND SUPPLEMENTARY MATERIALS

| # | Task | Milestone | Responsibility |
|---|---|----------------|--|
| 1 | Delivery of chapter drafts for external reviews | Phases 2 and 3 | Experts Assessment TSU Secretariat |
| 2 | Delivery of chapters for Plenary | Phase 4 | Experts Assessment TSU |
| 3 | Delivery of the final chapters | Phase 5 | Assessment TSU |

1. Delivery of chapter drafts for external reviews (Phases 2 and 3)
 - The Secretariat, in collaboration with the assessment TSU, coordinates a MEP and Bureau (or management committee) review before external reviews
 - The assessment TSU ensures that chapters:
 - a. Include a header as follows:

Intergovernmental Science-Policy Platform on Biodiversity and Ecosystem Services (IPBES)
Title of the assessment

Name of the review (dates)

This document is confidential. Do not cite, quote or circulate

- b. Include a “CONFIDENTIAL” watermark
- c. Include line numbers and centred page numbers in the footer
- d. Are formatted as follows:
 - Margins: top: 0.79, bottom: 0.79, left: 0.79, right: 0.79
 - Spacing: before: 12, after: 6, Line spacing: single
 - Title level 1: font “Times New Roman”, bold, size 18
 - Title level 2: font “Times New Roman”, bold, size 14
 - Normal text: font “Times New Roman”, size 12
 - Species names are italicized

⁵ The assessment TSU is responsible for coordinating, guiding and ensuring proper implementation of the experts' tasks.

References to other chapters and sections, glossary, supplementary materials, figures, tables, textboxes are bold

- e. Follow the UN editorial manual for editing, formatting and style
 - f. Follow the online Oxford Dictionary (set to British English) or the Concise Oxford English Dictionary, twelfth edition, for spelling
 - g. Include an executive summary. From Phase 3, each statement of the executive summary should include traceable accounts in curly brackets, referring to sections of the chapters containing the underlying evidence, and the degree of confidence based on the quantity and quality of evidence and the level of agreement regarding that evidence.⁶
 - h. Have in-text citations linked to Zotero and a list of references generated by Zotero (see category BIBLIOGRAPHIC REFERENCES for more information)
 - i. Contain a maximum of about 50,000 words (not including references and supplementary materials)
 - j. Include figures and tables that respect guidance given in the present protocol (see category FIGURES AND TABLES for more information)
- The assessment TSU ensures that the first pages of each chapter include:
- a. Guidance for external reviewers
 - b. The assessment's title, followed by the chapter's title
 - c. Authors listed by status (coordinating lead authors, lead authors, fellows, contributing authors, review editors) and by alphabetical order with, in parentheses, their country or countries of citizenship, separated by a comma when they have more than one; and, following a slash, their country of affiliation, if different from that or those of their citizenship, or their organization if they belong to an international organization. The following footnote is included: "Authors are listed in alphabetical order with, in parentheses, their country or countries of citizenship, separated by a comma when they have more than one; and, following a slash, their country of affiliation, if different from that or those of their citizenship, or their organization if they belong to an international organization. The countries and organizations having nominated the experts are listed on the IPBES website (except for contributing authors who were not nominated)." For more information on the list of authors, see category REPORT'S FRONT MATTER AND ANNEXES
 - d. A disclaimer on maps "The designations employed and the presentation of material on the maps used in the present report do not imply the expression of any opinion whatsoever on the part of the Intergovernmental Science-Policy Platform on Biodiversity and Ecosystem services concerning the legal status of any country, territory, city or area or of its authorities, or concerning the delimitation of its frontiers or boundaries. These maps have been prepared or used for the sole purpose of facilitating the assessment of the broad biogeographical areas represented therein."
 - e. A 2-level table of contents
 - f. Lists of figures, tables, textboxes and supplementary materials
- The assessment TSU or Secretariat runs an anti-plagiarism software before each external review (optional for Phase 2, mandatory for Phase 3)
- The assessment TSU submits the chapters (.docx and .pdf) to the Secretariat one working day before the start of the external review
2. Delivery of the chapters for Plenary (Phase 4)

⁶ For more information, please consult IPBES (2018): IPBES Guide on the Production of Assessments. Secretariat of the Intergovernmental Science-Policy Platform on Biodiversity and Ecosystem Services, Bonn, Germany. Available at: <https://ipbes.net/guideproduction-assessments>

- The Secretariat, in collaboration with the assessment TSU, coordinates a final MEP and Bureau (or management committee) review, during which the Secretariat is given the opportunity to review the chapters, ensuring consistency with previous IPBES products.
 - The assessment TSU ensures that chapters include all characteristics listed above, except for:
 - a. The header, which instead reads “Please do not cite, quote or distribute” centred
 - b. No line numbers
 - The assessment TSU ensures that the first pages of each chapter include all characteristics listed above, except for:
 - a. The header for Plenary documents, including the document’s type and number
 - b. A note from the Secretariat reminding relevant Plenary decisions
 - The assessment TSU or Secretariat runs an anti-plagiarism software early in Phase 4 (to allow time for experts to address any issues)
 - The assessment TSU submits the final chapters (.docx and .pdf) to the Secretariat eight weeks before Plenary.
 - The assessment TSU creates a Zenodo repository for each chapter and uploads all the chapters and their supplementary materials in PDF format (Phase 4).
 - The assessment TSU enters the metadata for each chapter repository:
 - a. Visibility: select “Restricted”
 - b. Communities: select “IPBES”
 - c. Resource type: select “Publication/Report”
 - d. Title: enter “IPBES *Title of the Assessment Report: Chapter X: Chapter title*”
 - e. Publication date: enter a date before the start of final government review (to be coordinated with the Secretariat)
 - f. Creators: enter the name of experts along with their affiliation and ORCID if available
 - g. Description: add short description of the upload
 - h. Additional Description: enter “Suggested citation: *each chapter citation agreed by experts and the secretariat*”
 - i. Licenses: select “Creative Commons Attribution 4.0 International”
 - j. Contributors: select “Editor” role and enter the names of Review review editors along with their affiliation and ORCID if available
 - k. Contributors: select “Other” role and enter the names of cContributing authors along with their affiliation and ORCID if available
 - l. Keywords and subjects: add “IPBES”, “Assessment”, and relevant terms
 - m. Versions: enter “v4.0.0” (see ICT guidelines)
 - Related works: create links to management report(s) relevant to the chapter and figures and tables of the chapter
3. Delivery of the final chapters (Phase 5)
- Experts (or assessment TSU) identify necessary changes to make to the chapters in order to reflect the decisions taken at Plenary
 - The assessment TSU submits the updated chapters to the graphic designer shortly after Plenary
 - The assessment TSU reviews all chapters before the launch
 - The assessment TSU uploads all the updated chapters and their supplementary materials to Zenodo, reflecting the changes made to the SPM during Plenary (Phase 5). The assessment TSU changes the visibility of the previous version on Zenodo to “restricted access”
 - The assessment TSU coordinates with the secretariat on the time/date to publish the final chapters (in other words, which day to make the chapters “open access” on Zenodo)
 - The assessment TSU enters metadata of each chapter repository as above except for:
 - a. Visibility: select “Open access”

- b. Publication date: date agreed with the secretariat
- c. Versions: enter “v10.0.0” (see [ICT guidelines](#))
- The secretariat or data TSU checks that the related identifier to the SPM is specified on Zenodo.
- See category ZENODO FINAL UPLOAD (CROSS-CATEGORIES) to Zenodo upload on final laid-out version of chapters

Recommendations:

- Experts and the assessment TSU are advised to use the IPBES file name convention and versioning scheme for all assessment related files.
- Experts and the assessment TSU are advised to use the “Insert Caption” in combination with the “Cross-reference” functions in word to refer to figures, tables and sections within the same chapter. This allows to automatically keep track of changes, even when the order is changed or when portions of the chapters are deleted.
- The assessment TSU is advised to set earlier internal deadlines for lead authors/fellows and for coordinating lead authors for handing over their sections and chapter, respectively.
- The assessment TSU is advised to apply proper chapter format and style for internal reviews and continuously, to avoid last-minute corrections.
- The assessment TSU is advised to upload bib and/or ris files for citations created by Data TSU to each chapter uploaded to Zenodo
- The assessment TSU is advised ed to set the publication time/date of final chapters when they are available unless the embargo feature is used to publish chapters on a chosen date at midnight UTC.
- The assessment TSU is advised to start filling in the metadata for each chapter Zenodo repository ahead of the publication date (and save as a draft)

SUMMARY FOR POLICYMAKERS

| # | Task | Milestone | Responsibility |
|---|---|-----------|---------------------------|
| 1 | Delivery of the summary for policymakers for the second external review | Phase 3 | Experts Assessment TSU |
| 2 | Delivery of the summary for policymakers for Plenary | Phase 4 | Experts Assessment TSU |
| 3 | Delivery of the final summary for policymakers | Phase 5 | Experts Assessment TSU |

1. Delivery of the summary for policymakers for the external reviews (Phase 3)
 - The Secretariat, in collaboration with the assessment TSU, coordinates a MEP and Bureau (or management committee) review before the external review
 - The assessment TSU ensures that the summary for policymakers (SPM):
 - a. Includes a header as follows

Intergovernmental Science-Policy Platform on Biodiversity and Ecosystem Services (IPBES)
Title of the assessment

Name of the review (dates)

This document is confidential. Do not cite, quote or circulate

- b. Include a “CONFIDENTIAL” watermark

- c. Include line numbers and centred page numbers in the footer
- d. Are formatted as follows:
 - Margins: top: 0.79, bottom: 0.79, left: 0.79, right: 0.79
 - Spacing: before: 12, after: 6, Line spacing: single
 - Title level 1: font “Times New Roman”, bold, size 18
 - Title level 2: font “Times New Roman”, bold, size 14
 - Normal text: font “Times New Roman”, size 12
 - Species names are italicized
- e. Each key message and each background paragraph are numbered (e.g., KM-A1 and A1, respectively)
- f. First statement of each key message is bold and include traceable accounts in curly brackets, referring to the relevant background paragraph
- g. Each statement of the background paragraphs includes traceable accounts in curly brackets, referring to sections of the chapters containing the underlying evidence, and the degree of confidence based on the quantity and quality of evidence and the level of agreement regarding that evidence.⁷
- h. Contain a maximum of about 15,000 words
- i. Include figures and tables that respect guidance given in the present protocol (see category FIGURES AND TABLES for more information)
- j. Either an appendix on the IPBES communication of the degree of confidence (four-box model for quantitative communication of confidence) or a disclaimer on traceable accounts “The chapter references enclosed in curly brackets (e.g. {2.3.1, 2.3.1.2, 2.3.1.3}) are traceable accounts and refer to sections of the chapters of the IPBES thematic assessment of invasive alien species. A traceable account is a description within the corresponding texts of these chapters, reflecting the evaluation of the type, amount, quality, and consistency of evidence and the degree of agreement for that particular statement or key finding.”
- The assessment TSU ensures that the first pages of the SPM include:
 - a. The assessment’s title, followed by “Summary for policymakers”
 - b. Authors listed by status (co-chairs, TSU, coordinating lead authors, review editors) and by alphabetical order with, in parentheses, their country or countries of citizenship, separated by a comma when they have more than one; and, following a slash, their country of affiliation, if different from that or those of their citizenship, or their organization if they belong to an international organization. The following footnote is included: “Authors are listed in alphabetical order with, in parentheses, their country or countries of citizenship, separated by a comma when they have more than one; and, following a slash, their country of affiliation, if different from that or those of their citizenship, or their organization if they belong to an international organization. The countries and organizations having nominated the experts are listed on the IPBES website (except for contributing authors who were not nominated). For more information on the list of authors, see category REPORT’S FRONT MATTER AND ANNEXES
 - c. Members of the management committee listed by status (MEP, Bureau) and alphabetical order
 - d. A disclaimer on maps “The designations employed and the presentation of material on the maps used in the present report do not imply the expression of any opinion

⁷ For more information, please consult IPBES (2018): IPBES Guide on the Production of Assessments. Secretariat of the Intergovernmental Science-Policy Platform on Biodiversity and Ecosystem Services, Bonn, Germany. Available at: <https://ipbes.net/guideproduction-assessments>

whatsoever on the part of the Intergovernmental Science-Policy Platform on Biodiversity and Ecosystem services concerning the legal status of any country, territory, city or area or of its authorities, or concerning the delimitation of its frontiers or boundaries. These maps have been prepared or used for the sole purpose of facilitating the assessment of the broad biogeographical areas represented therein.”

- The assessment TSU submits the chapters (.docx and .pdf) to the Secretariat one working day before the start of the external review
2. Delivery of the summary for policymakers for Plenary (Phase 4)
 - The Secretariat, in collaboration with the assessment TSU, coordinates a final MEP and Bureau (or management committee) review, during which the Secretariat is given the opportunity to review the chapters, ensuring consistency with previous IPBES products
 - The assessment TSU ensures that the SPM includes all characteristics listed above, except for the header, which instead reads “**Please do not cite, quote or distribute**” centred
 - The assessment TSU ensures that the first pages of the SPM includes all characteristics listed above, except for:
 - a. The header for Plenary documents, including the document’s type and number
 - b. A note from the Secretariat, reminding relevant Plenary decisions
 - The assessment TSU submits the chapters (.docx and .pdf) to the Secretariat eight weeks before Plenary
 - The assessment TSU creates a Zenodo repository for the SPM and uploads it in PDF format before Plenary (Phase 4)
 - The assessment TSU enters the metadata for the SPM repository:
 - a. Visibility: select “Restricted”
 - b. Communities: select “IPBES”
 - c. Resource type: select “Publication/Report”
 - d. Title: enter “IPBES *Title of the Assessment Report*: Summary for Policymakers”
 - e. Publication date: enter a date before the start of final government review (to be coordinated with the Secretariat)
 - f. Creators: enter the name of experts along with their affiliation and ORCID if available
 - g. Description: add short description of the upload
 - h. Additional Description: enter “Suggested citation: *SPM citation agreed by experts and the secretariat*”
 - i. Licenses: select “Creative Commons Attribution 4.0 International”
 - j. Contributors: select “Editor” role and enter the names of SPM Review editors along with their affiliation and ORCID if available
 - k. Keywords and subjects: add “IPBES”, “Assessment”, and relevant terms
 - l. Versions: enter “v4.0.0” (see [ICT guidelines](#))
 - m. Related works: create links to SPM figure Zenodo
 3. Delivery of the final summary for policymakers (Phase 5)
 - The assessment TSU and Secretariat prepare the advanced unedited version of the SPM: the assessment TSU reviews the negotiated SPM to correct any grammatical error and typo, and submits it to the Secretariat a few hours after the end of the negotiations. The Secretariat formats the advanced unedited version of the SPM for Plenary approval.
 - The Secretariat publishes the approved unedited version of the SPM as part of the media release a few days after Plenary
 - The Secretariat submits the advanced unedited version to conference services a few days after Plenary for their review and translation into the 5 other UN languages (Arabic, Chinese, French, Russian and Spanish)

- The assessment TSU submits the advanced unedited version reviewed by conference services to the graphic designer for layout as soon as it becomes available (usually a few weeks after Plenary). Please also consult the category REPORT’S FRONT MATTER AND ANNEXES for more details on the elements to submit to the graphic designer
- Relevant experts and the assessment TSU review the translated SPM to ensure the correct use of technical and IPBES terms
- The assessment TSU and the Secretariat review the laid-out SPM before its publication
- The assessment TSU uploads the SPM approved by Plenary to Zenodo in PDF format, along with necessary metadata to its repository, for publication on the time/date of the media launch (Phase 5). The assessment TSU changes the visibility of previous version on Zenodo to “restricted access” once latest version is published as “Open Access”.
- The assessment TSU enters metadata of the SPM on Zenodo as above except for:
 - a. Visibility: select “Open access”
 - b. Publication date: date of Media launch
 - c. Versions: enter “v10.0.0” (see [ICT guidelines](#))
- The secretariat/data TSU checks that the identifiers for the related data deposit packages and data management reports are specified
- See category ZENODO FINAL UPLOAD (CROSS-CATEGORIES) for Zenodo upload of the final laid-out version of the SPM

Recommendations:

- The assessment TSU is advised to upload bib and/or ris files for citations created by the Data TSU to the SPM to Zenodo
- The assessment TSU is advised to set earlier internal deadlines for coordinating lead authors and for co-chairs for handing over the SPM
- The assessment TSU is advised to start filling in the metadata of the SPM repository on Zenodo and save it as a draft before its publication date

FIGURES AND TABLES

DELIVERY OF ORIGINAL (SELF-CREATED) FIGURES AND TABLES

| # | Task | Milestone | Responsibility |
|---|--|-----------|----------------------------|
| 1 | Development of original figures and tables | Ongoing | Experts Assessment TSU |
| 2 | Development of data management reports | Ongoing | Experts Assessment TSU |
| 3 | Captions for original tables and figures | Ongoing | Experts Assessment TSU |
| 4 | Upload to Zenodo before Plenary | Phases 4 | Assessment TSU |
| 5 | Upload to Zenodo after Plenary | Phase 5 | Assessment TSU |
| 6 | Layout | Phase 5 | Designer Assessment TSU |

1. Development of original figures and tables (ongoing)
 - The assessment TSU ensures that maps follow the [IPBES guidelines for country borders](#)

- The assessment TSU ensures that maps follow the [ISO 3166-1 alpha 3 code for country names](#)
- The assessment TSU ensures that maps use the [Robinson projection for World maps](#)
- 2. Development of data management reports (ongoing)
 - Experts, supported by the assessment TSU, develop associated data management reports where relevant (see section on data management reports)
- 3. Captions for original tables and figures

The assessment TSU coordinates with the experts to ensure that all captions for original tables and figures include the following elements:

 - a. Table/Figure number
 - b. Title
 - c. Description
 - d. Link to the data management report if relevant
- 4. Upload to Zenodo before Plenary (Phase 4)
 - The assessment TSU creates one repository on Zenodo for figures and tables per chapter and SPM.
 - The assessment TSU uploads the native (editable) format of the figure/table along with the file with caption as described above and its data management report in each Zenodo repository where relevant before Plenary (Phase 4). For more details on file types, refer to Part 5 – File Formats in the [IPBES ICT guide](#). The IPBES file [naming convention](#) and [versioning scheme](#) should be used for all files and figures.
 - The assessment TSU enters the metadata associated figure/table in each Zenodo repository:
 - a. Visibility: select “Restricted”
 - b. Communities: select “IPBES”
 - c. Resource type: select “Other”
 - d. Title: enter “IPBES *Title of the Assessment Report: Summary for Policymakers or Chapter X: Figures, tables, and caption*”
 - e. Publication date: same date as its chapter/SPM publication date
 - f. Creators: enter the name of experts along with their affiliation and ORCID if available
 - g. Description: add short description of the upload
 - h. Licenses: select “Creative Commons Attribution 4.0 International” or [CC0 or CC-BY or equivalent usage rights](#). Divergent usage rights are approved by the technical support unit on knowledge and data
 - i. Contributors: select “Editor” role and enter the names of the SPM review editors along with their affiliation and ORCID if available
 - j. Keywords and subjects: add “IPBES”, “Assessment”, and relevant terms
 - k. Versions: enter “v4.0.0” (see [ICT guidelines](#))
 - l. Related works: create links to its chapter/SPM on Zenodo
- 5. Upload to Zenodo after Plenary (Phase 5)
 - After Plenary, the assessment TSU uploads all the updated figures and tables to Zenodo reflecting the changes made to the SPM during the negotiations (Phase 5). The assessment TSU changes the visibility of previous version on Zenodo to “restricted access”
 - The assessment TSU enters metadata of the figure/table Zenodo per chapter as above except for:
 - a. Visibility: select “Open access”
 - b. Publication date: date agreed with the secretariat
 - c. Versions: enter “v10.0.0” (see [ICT guidelines](#))
 - See category ZENODO FINAL UPLOAD (CROSS-CATEGORIES) for Zenodo upload on final laid-out version of figures/tables

6. Layout (Phase 5)
 - The assessment TSU shares native (editable) figures with the graphic designer, preferably before the Plenary, for layout. Accepted formats are eps, ai, xls, svg,pdf, ppt, jpg or tiff. Pictures should be either in JPG or TIFF format with 300 dpi minimum and total weight not less than 1.5 mb.
 - Experts (or assessment TSU) identify necessary changes to make to the figures in order to reflect the decisions taken at Plenary and the assessment TSU coordinates with the graphic designer to revise figures where necessary.

Recommendations:

- Experts are advised to keep track of how they created the table/figure: where did the data come from, when was it accessed, how was it processed and analysed? Which software and which versions were used?
- The assessment TSU, supported by the Data TSU, are strongly advised to ensure that original figures/tables are colour blind friendly. When colours are meaningful, they should be distinguishable when printed in grey tones. When colours are used for esthetical reasons, this is not necessary. It is important to refrain from using colour names in captions wherever possible. For more information on the use of colours and colour blindness, a [technical guideline](#) was developed.
- Experts and the assessment TSU are advised to use the IPBES [file name convention](#) and [versioning scheme](#) for all assessment related files.
- Experts are advised to remove country borders when they are not necessary to avoid any comments raised at Plenary
- The assessment TSU is advised to use zipped folder for the Zenodo upload when the number of files is more than 100 files. For collections with fewer files, it is recommended to upload them all separately.

DELIVERY OF BORROWED/ADAPTED FIGURES, PHOTOS, AND TABLES

| # | Task | Milestone | Responsibility |
|---|--|-----------|---------------------------------------|
| 1 | Compliance with IPBES guidelines | Ongoing | Experts Assessment TSU Data TSU |
| 3 | Development of data management reports | Ongoing | Experts |
| 2 | Obtention of permissions | Phase 4 | Experts Assessment TSU |
| 4 | Captions for borrowed/adapted figures, photos and tables | Ongoing | Experts Assessment TSU |
| 5 | Upload to Zenodo before Plenary | Phase 4 | Assessment TSU |
| 6 | Upload to Zenodo after Plenary | Phase 5 | Assessment TSU |
| 7 | Layout | Phase 5 | Assessment TSU Secretariat |

1. Compliance with IPBES guidelines (ongoing)
 - The assessment TSU ensures that such figures/tables are compliant with the IPBES guidelines
 - If borrowed or adapted figures are not compliant with IPBES guidelines, experts and the assessment TSU explore options to adapt the figure to fit the guidelines, in consultation with the data TSU if necessary to follow: the [IPBES guidelines for country borders](#), [ISO 3166-1 alpha 3](#)

[code for country names](#) and [Robinson projection for World maps](#) and be colour blind-friendly as described above.

2. Development of data management reports if appropriate (ongoing)
If relevant, experts, supported by the assessment TSU, develop associated data management reports (see section on data management reports)
3. Obtention of permissions (Phase 4)
 - Once the use of such figure/table has been confirmed (shortly after the second external review), the assessment TSU ensures that all permissions are obtained, where necessary, before submitting the final draft for Plenary. Permission to re-use such figure/table should be obtained using this [copyright waiver](#). Note that published figures are not always free to use (even when one of the assessment experts was an author on the paper), for many academic journals, all copyright rights are automatically assigned to the publisher. When one of the assessment experts was an author on the paper, they can request permission from the journal directly and free of charge.
 - The IPBES secretariat generally does not approve any fee to obtain permission in the use of borrowed figure unless necessary
4. Captions for borrowed/adapted figures, photos and tables (ongoing)
 - The citation of the original figure/table is added to the Zotero library, so that the original source will be included in the bibliography of the chapter
 - The assessment TSU coordinates with the experts to ensure that all captions for adapted/borrowed tables and figures include the following elements:
 - a. Table/Figure number
 - b. Title
 - c. Description
 - d. A mention “Borrowed from *source*” or “Adapted from *source*” or “Underlying data from *source*”, with the source formatted as an in-text citation linked to Zotero
 - e. DOI of the source and corresponding license
 - f. A footnote for the disclaimer on maps where relevant (i.e., a map that does not respect the IPBES guidelines but couldn’t be adapted or replaced). The disclaimer reads “The boundaries and names shown, and the designations used on the maps shown here do not imply official endorsement or acceptance by IPBES”
 - g. Link to the data management report if relevant
 - The assessment TSU coordinates with the experts to ensure that all captions for adapted/borrowed photos or artwork include the following elements:
 - a. Figure number
 - b. Title
 - c. Description
 - d. Credits
 - e. Corresponding license
 - f. Link to the data management report if relevant
5. Upload on Zenodo before Plenary (Phase 4)
 - The assessment TSU uploads the native format (editable) figure/table along with the file with caption as described above and its data management report in each zenodo repository where relevant before Plenary (Phase 4). For more details on file types, refer to Part 5 – File Formats in IPBES ICT guide:
<https://ict.ipbes.net/ipbes-ict-guide/data-and-knowledge-management/technical-guidelines/file-for-mats>. The IPBES [file naming convention](#) and [versioning scheme](#) should be used for all files and figures.
 - The assessment TSU enters metadata of figure/table Zenodo per chapter:

- g. Visibility: select “Restricted”
 - h. Communities: select “IPBES”
 - i. Resource type: select “Other”
 - j. Title: IPBES *Title of the Assessment Report: Summary for Policymakers* or *Chapter X: Figures, tables, and caption*
 - k. Publication date: same date as its chapter/SPM publication date
 - l. Creators: enter the name of experts along with their affiliation and ORCID if available
 - m. Description: add short description of the upload
 - n. Licenses: select “Creative Commons Attribution 4.0 International” or [CC0 or CC-BY or equivalent usage rights](#). Divergent usage rights are approved by the data TSU
 - o. Contributors: select “Editor” role and enter the names of SPM Review editors along with their affiliation and ORCID if available
 - p. Keywords and subjects: add “IPBES”, “Assessment”, and relevant terms
 - q. Versions: enter “v4.0.0” (see [ICT guidelines](#))
 - r. Related works: create links to its chapter/SPM on Zenodo
6. Upload to Zenodo after Plenary (Phase 5)
- The assessment TSU uploads all the updated adapted figures and tables reflecting the changes made to the SPM during Plenary (Phase 5). The assessment TSU changes the visibility of previous version on Zenodo to “restricted access”
 - The assessment TSU enters the metadata of the figure/table on Zenodo per chapter as above except for:
 - a. Visibility: select “Open access”
 - b. Publication date: date agreed with the secretariat
 - c. Versions: enter “v10.0.0” (see [ICT guidelines](#))
 - See category ZENODO FINAL UPLOAD (CROSS-CATEGORIES) for Zenodo upload on final laid-out version of figures/tables
7. Layout (Phase 5)
- The assessment TSU shares native (editable) figures with the graphic designer along with their associated credits, preferably before the Plenary, for layout. Accepted formats are eps, ai, xlsx, svg, pdf, ppt, jpg or tiff. Pictures should be 600dpi minimum.
 - After Plenary, experts identify necessary changes to make to the figures in order to reflect the decisions taken during the negotiations and the assessment TSU coordinates with the graphic designer to revise figures where necessary.

Recommendations:

- Experts are advised to keep track of how they created the table/figure: where did the data come from, when was it accessed, how was it processed and analysed? Which software and which versions were used? It is not necessary yet to write complete data management reports yet, but these details should be written and saved, so that they can be used when the data management reports are developed at a later stage.
- Experts and the assessment TSU are advised to use the IPBES [file name convention](#) and [versioning scheme](#) for all assessment related files.
- The assessment TSU is advised to limit the number of different versions in Zenodo repository by addressing changes collectively at each milestone
- The assessment TSU is advised to start checking copyright holder of original source once the chapter/SPM draft is mostly confirmed to maximize the time to obtain permission.

DELIVERY OF DATA AND KNOWLEDGE FROM INDIGENOUS PEOPLES AND LOCAL COMMUNITIES

| # | Task | Milestone | Responsibility |
|---|---|-----------|----------------|
| 1 | Free, prior and informed consent (FPIC) | Ongoing | ILK TSU |
| 2 | License rights for ILK materials | Phase 4 | Assessment TSU |

1. Free, prior and informed consent (FPIC) (ongoing)
 - The ILK TSU ensures that IPLCs are informed and consent to the information used in the assessment through the dialogues, invitations to become contributing authors and/or the FPIC process;
 - IPLCs approve the representation of their shared indigenous and local knowledge in the assessment through the dialogues and/or the FPIC process;
2. License rights for ILK materials (Phase 4)
 - The assessment TSU ensures that the terms of agreement on the reuse, representation and storage of the materials are documented
 - The ILK and assessment TSUs upload submitted ILK materials to the ILK and the assessment Zotero libraries following the agreed terms when requested.

Recommendations:

- The assessment and ILK TSUs are advised to ensure that the contributing authors and their contact details, especially IPLC, are saved, so that any uptake of their contributions can be directly communicated with the contributors (email may not be an option for everyone)
- Experts and/or assessment and ILK TSUs are advised to inform contributing authors of ILK materials of the inclusion of their contributions, and if possible, invite them to review the relevant paragraphs.

BIBLIOGRAPHIC REFERENCES

| # | Task | Milestone | Responsibility |
|---|---|-----------|-------------------------------|
| 1 | Creation of a bibliographic library | Phase 1 | Secretariat Assessment TSU |
| 2 | Reference management | Ongoing | Experts Assessment TSU |
| 3 | Delivery of the final bibliographic library | Phase 5 | Assessment TSU |

1. Creation of a bibliographic library (Phase 1)
 - The Secretariat creates a Zotero bibliographic library and grants admin access to the assessment TSU
 - The assessment TSU creates separate collections (folders) for each chapter and sub-collections (sub-folders) as needed in the Zotero library
 - The assessment TSU invites the experts as members to the Zotero library
2. Reference management (*ongoing*)
 - Experts (and/or the assessment TSU) add references used for the assessment to the Zotero folders using a DOI, ISBN or pubmed id

- Experts (or assessment TSU) ensure that all citations and list of references in the chapters and glossary are linked to/generated by Zotero in APA 7th edition style
- The assessment TSU ensures the completeness and accuracy of the metadata. All entries should have a DOI, ISBN, url, and/or other unique identifier by Phase 4. If DOIs for book is available, add it under “Extra” field starting with “DOI: *number of DOI*” to show it on the bibliography
- 3. Delivery of the final bibliographic library (Phase 5)
 - The assessment TSU prepares the final library, which only contains references cited in the report, with a collection (folder) for each chapter and for the glossary;
 - The assessment TSU deletes all the entries that have not been used (un-used references) in the assessment report from the final library;
 - The assessment TSU extracts the final library in Zotero RDF, including files and notes, as well as a bibtext file for backup, and uploads them to Zenodo for the full report and each chapter.
 - For more details, refer to the [Zotero administration in IPBES ICT guide](#)

Recommendations:

- The assessment TSU is advised to create a tutorial for experts to use Zotero on their own in Phase 1
- The assessment TSU is strongly advised to review Zotero entries (to ensure accuracy and remove duplicates) regularly, and especially before each external review
- The assessment TSU is strongly advised to review in-text citations and their link to the Zotero library regularly, and especially before each external review
- The assessment TSU is advised to create new collections for references that are cited in the report for each chapter (e.g., “Chapter 1_cited”)
- The assessment TSU is strongly advised to deliver the final bibliographic library by the Plenary
- The assessment TSU is strongly advised to provide the opportunity to experts to download the full library before deleting un-used references from the library. Note that, depending on internet speed and the number of references, this could take a long time
- It is not recommended to use that tag function, as only chapter tags will be retained in the final bibliographic library. There is an option in Zotero that tags are automatically generated, it is recommended to turn that function off.
- When there are websites without versions or dates, it is recommended to use the wayback machine: [Internet Archive: Digital Library of Free & Borrowable Books, Movies, Music & Wayback Machine](#) Here you can enter a link, and then you get a url that will be saved, so it will be possible to visit the exact same information later.

DATA MANAGEMENT REPORTS

| # | Task | Milestone | Responsibility |
|---|--|------------|---------------------------|
| 1 | Development of data management reports | Ongoing | Experts Assessment TSU |
| 2 | Upload to Zenodo before Plenary | Phases 2-4 | Assessment TSU |
| 3 | Upload to Zenodo after Plenary | Phases 5 | Assessment TSU |

1. Development of data management reports (ongoing)
 - The assessment TSU ensures that experts develop data management reports for literature reviews, as well as relevant figures and tables, using this template [LINK TO TEMPLATE]. For

more information on how and when to develop data management reports, please consult this [tutorial](#).

- The assessment TSU ensures that all data management reports are updated at each milestone by experts
- 2. Upload to Zenodo before Plenary (Phases 2-4)
 - The assessment TSU uploads available data management reports at each milestone. Each repository should include attachments (e.g., scripts used to create the figures/tables, data layers or references to the data layers used to create figure/tables, in an interoperable and open format of the figures, machine-readable tables).
 - The assessment TSU uploads all data management reports before Plenary.
 - The assessment TSU enters the metadata of the data management report(s) on Zenodo:
 - a. Visibility: select “Restricted”
 - b. Communities: select “IPBES”
 - c. Resource type: select “Other”
 - d. Title: IPBES *Title of the Assessment Report*, data management report for Chapter X/Section X/Figure X/Table X: *Section title*
 - e. Publication date: same date as its chapter publication date
 - f. Creators: enter the name of experts contributed to the development of data along with their affiliation and ORCID if available
 - g. Description: add short description of the upload
 - h. Licenses: select “Creative Commons Attribution 4.0 International” Keywords and subjects: add “IPBES”, “Assessment”, and relevant terms
 - i. Versions: enter “v4.0.0” (see [ICT guidelines](#))
 - j. Related works: create links to its relevant chapter zenodo
 - The assessment TSU grants access to requests to the above files during external review periods to registered reviewers only
 - The assessment TSU adds the link to the data management report(s) on Zenodo to the associated figure/table caption or footnote of chapters at each milestone.
- 3. Upload to Zenodo after Plenary (Phase 5)
 - The assessment TSU uploads all the updated data management reports reflecting the changes made to the SPM during Plenary if any (Phase 5). The assessment TSU changes the visibility of previous version on Zenodo to “restricted access”
 - The assessment TSU ensures to enter metadata of data management report(s) on Zenodo as above except for:
 - a. Visibility: select “Open access”
 - b. Publication date: date agreed with the secretariat
 - c. Versions: enter “v10.0.0” (see [ICT guidelines](#))

Recommendations:

- When the data management reports are not yet written and included in the second order draft, either as separate reports uploaded to Zenodo or as supplementary material at the end of the chapters, it is recommended for the experts and assessment TSU to write them during the second external review period.
- The Data TSU can review data management reports if needed
- If experts request an embargo for a data management report or a dataset, consult Data TSU for their guidance

REPORT'S FRONT MATTER, ANNEXES AND CITATIONS

| # | Task | Milestone | Responsibility |
|----|---|------------|--|
| 1 | Cover page and other illustrations | Phases 4-5 | Assessment TSU Graphic designer |
| 2 | Citations | Phase 4 | Assessment TSU Secretariat Experts |
| 3 | Inside cover (disclaimers, ISBN, and photo credits) | Phase 5 | Assessment TSU Secretariat |
| 4 | Foreword | Phase 5 | Assessment TSU Secretariat |
| 5 | Statements from key partners | Phase 5 | Secretariat |
| 6 | Acknowledgements | Phase 5 | Experts Assessment TSU |
| 7 | Table of contents | Phase 5 | Assessment TSU Graphic designer |
| 8 | Glossary | Phases 2-5 | Experts Assessment TSU |
| 9 | Acronyms | Phases 2-5 | Assessment TSU |
| 10 | List of authors and review editors | Phases 2-5 | Assessment TSU |
| 11 | List of expert reviewers | Phase 5 | Assessment TSU |

1. Cover page and other illustrations (Phases 4-5)
 - About 3 months before Plenary, the assessment TSU and graphic designer select pictures for the cover page of the report.
 - Shortly after Plenary, the assessment TSU selects a number of pictures to illustrate the report. The number of pictures is decided by the graphic designer (usually between 10 and 15)
 - The assessment TSU obtains all permissions to use these pictures and lists associated credits and licenses in the inside cover. Note that the graphic designer may own a license to photo bank websites.
2. Citations (Phase 4)
 - The assessment TSU generates DOIs for the full report, for the individual chapters and for the SPM on Zenodo. Always use the DOIs representing all versions (i.e., the very first published version –1), which will always resolve to the latest version
 - The assessment TSU creates suggested citations for the full report, for the individual chapters and for the SPM following the IPBES suggested citation style (APA style 7th edition) following these standards:
 - a. Full report: IPBES (year). *Title of the Assessment Report* of the Intergovernmental Science-Policy Platform on Biodiversity and Ecosystem Services. *Co-chairs*, and *TSU* (eds.). IPBES secretariat, Bonn, Germany. *Link to the report's DOI*
 - b. Chapter: *CLAs, LAs, and Fellows* (year). In: *Title of the Assessment Report* of the Intergovernmental Science-Policy Platform on Biodiversity and Ecosystem Services. *Co-chairs*, and *TSU* (eds.). IPBES secretariat, Bonn, Germany. *Link to the chapter's DOI*
 - c. SPM: IPBES (year). Summary for Policymakers of the *Title of the Assessment Report* of the Intergovernmental Science-Policy Platform on Biodiversity and Ecosystem Services. *Co-chairs*, *TSU*, and *CLAs* (eds.). IPBES secretariat, Bonn, Germany. *Link to the SPM's DOI*

- d. As a standard, authors are ordered by status and by alphabetical order, but this can be changed.
- The Secretariat, data TSU and relevant experts (Co-chairs, CLAs) approve the final citations.
- 3. Inside cover (Phase 5)
 - The assessment TSU coordinates with the Secretariat to provide the following information to the graphic designer shortly after Plenary:
 - a. Copyright and ISBN number (note that the ISBN number is obtained by the Secretariat)
 - b. Disclaimer on reproduction
 - c. Disclaimer on traceability accounts
 - d. Disclaimer for maps, figures and tables: “The designations employed and the presentation of material on the maps used in the present report do not imply the expression of any opinion whatsoever on the part of the Intergovernmental Science-Policy Platform on Biodiversity and Ecosystem services concerning the legal status of any country, territory, city or area or of its authorities, or concerning the delimitation of its frontiers or boundaries. These maps have been prepared or used for the sole purpose of facilitating the assessment of the broad biogeographical areas represented therein.”
 - e. IPBES contact information
 - f. Photo credits (cover page and other illustrations in the report)
 - g. Members of the assessment TSU
 - h. Names of the graphic designer(s)
 - i. Suggested citation for the full report or for the SPM (please see above)
 - j. Members of the management committee
 - k. Acknowledgement paragraph for non-earmarked, earmarked and in-kind contributions
 - The assessment TSU may obtain most of the above information from previous IPBES reports.
- 4. Foreword (Phase 5)
 - The Assessment TSU drafts the forewords on behalf of the Chair and the Executive Secretary of IPBES
 - The Secretariat approves and finalizes the Foreword, and submit them to the graphic designer shortly after Plenary
- 5. Messages from key partners (Phase 5)
 - The Secretariat obtains the statements from key partners (UNEP, UNESCO, FAO, UNDP, CBD) and submits them to the graphic designer shortly after Plenary
- 6. Acknowledgements (Phase 5)
 - The assessment TSU drafts the acknowledgements for the assessment co-chairs’ review and approval (maximum 1000 words).
 - The assessment TSU submits the acknowledgements to the Secretariat shortly after Plenary.
- 7. Table of contents
 - The graphic designer will generate a table of content to be reviewed by the assessment TSU
 - The table of content should include the foreword, statements from key partners, acknowledgements, SPM (key messages, background and appendices), all chapters and a list of annexes
- 8. Glossary (Phases 2-5)
 - The experts compile a glossary, listing terms and their corresponding definition by alphabetical order.
 - The experts ensure that all definitions are supported by a (scientific) reference
 - The experts and the assessment TSU ensure that in-text citations are linked to Zotero and that a list of references is generated by Zotero (for more information, please refer to category BIBLIOGRAPHIC REFERENCES)

- The assessment TSU submits the glossary together with the chapters (following the same format) to the Secretariat for each external review and for Plenary approval.
 - Shortly after Plenary approval, experts (or assessment TSU) identify necessary changes to make to the glossary in order to reflect the decisions taken at Plenary
 - The assessment TSU submits the updated glossary to the graphic designer shortly after Plenary
9. Acronyms (Phases 2-5)
- The assessment TSU regularly reviews the drafts and decides, following the UN editorial manual, which acronyms to use
 - The assessment TSU prepares a list of acronyms to be submitted together with the chapters (following the same format) to the Secretariat for each external review and for Plenary approval.
 - Shortly after Plenary approval, experts (or assessment TSU) identify necessary changes to make to the list of acronyms in order to reflect the decisions taken at Plenary
 - The assessment TSU submits the updated list of acronyms to the graphic designer shortly after Plenary
10. List of authors (experts and contributing authors) (Phases 2-5)
- The assessment TSU compiles a list of authors for each chapter before each external review,
 - The assessment TSU creates the [complete list of authors](#) for the entire assessment in .csv encoded in UTF-8 (for example using [this template](#)), containing:
 - a. Authors' role(s)
 - b. Authors' name: surname, first name, middle name(s), full name (as shown on formal identification documents, such as a passport)
 - c. Chapter(s) in which the authors were involved
 - d. Authors ORCID id (recommended but optional)
 - e. Authors affiliation(s) (list all affiliations that correspond)
 - f. Authors country of affiliation in ISO 3166-1 alpha 3 code
 - g. Authors nationality(ies) in ISO 3166-1 alpha 3 code
 - h. Experts' nominated country(ies) in ISO 3166-1 alpha 3 code (this does not apply to contributing authors)
11. List of Experts reviewers (Phase 2-5)
- The assessment TSU develops a list of expert reviews including government submission during/after each external review period. For the official information for their name, affiliation and country of affiliation, refer to the information each reviewer submitted in the registration form. Include individual names if government submission includes any in addition to the record of government submission, Keep record of group submission if any and list "on behalf of *organisation*" in the final list
 - The assessment TSU ensures to delete MEP and Bureau members, IPBES TSUs, non-registered reviewers, and duplicates from the list
 - The assessment TSU finalises the list and send it to the designer

Recommendations:

- It is recommended that the assessment TSU starts compiling an [expert list](#) during Phase 4, to ensure that the contact details of all experts, including the contributing authors, are collected and information is complete by Phase 5.
- Experts without an ORCIDiD could be encouraged to obtain one, and share their iD with the assessment TSU.
- For the glossary: it is recommended to align with definitions used in previous assessments (available at <https://ipbes.net/glossary>) where possible

ZENODO FINAL UPLOAD (CROSS-CATEGORIES)

| # | Task | Milestone | Responsibility |
|---|---|-----------|----------------|
| 1 | Final laid out SPM | Phase 5 | Assessment TSU |
| 2 | Final laid out SPM figures and tables | Phase 5 | Assessment TSU |
| 3 | Final laid out chapters and full report | Phase 5 | Assessment TSU |
| 4 | Final laid out chapters' figures and tables | Phase 5 | Assessment TSU |
| 5 | Factsheets | Phase 5 | Assessment TSU |
| 6 | Data management report | Phase 5 | Assessment TSU |

1. Final laid out SPM
 - The assessment TSU uploads the final laid out SPM both in PDF and in Word files in addition to their citation files, and enters necessary metadata before its publication date as a draft
 - The assessment TSU enters metadata of the final laid out SPM on Zenodo as mentioned in the category SUMMARY FOR POLICYMAKERS except for:
 - a. Visibility: select "Open access"
 - b. Publication date: date agreed with the secretariat
 - c. Versions: enter "v10.0.0" (see [ICT guidelines](#))
 - d. Related work: create links to Full report and SPM figures and tables on Zenodo
 - The assessment TSU publish the final laid out SPM on the time/date agreed with the secretariat. The assessment TSU changes the visibility of previous version on Zenodo to "restricted access" once latest version is published as "Open Access"
2. Final laid out SPM figures and tables
 - The assessment TSU uploads the native (editable) format of the final laid out SPM figures and tables along with the file with caption and its data management report as a draft
 - The assessment TSU enters metadata of the final laid out SPM figures and tables on Zenodo as mentioned in the category Figures and Tables except for:
 - a. Visibility: select "Open access"
 - b. Publication date: date agreed with the secretariat (same date as the final laid out SPM)
 - c. Versions: enter "v10.0.0" (see [ICT guidelines](#))
 - d. Related work: create links to the SPM on Zenodo
 - The assessment TSU publish the final laid out SPM figures and tables on the time/date agreed with the secretariat. The assessment TSU changes the visibility of previous version on Zenodo to "restricted access" once latest version is published as "Open Access"
3. Final laid out chapters
 - The assessment TSU uploads the final laid out chapters both in PDF and in Word files, in addition to its supplementary materials (if any), references and citation files. The assessment TSU also enters necessary metadata before its publication date as a draft
 - The assessment TSU enters metadata of the final laid out chapters on Zenodo as mentioned in the category Chapters and Supplementary materials except for:
 - a. Visibility: select "Open access"
 - b. Publication date: date agreed with the secretariat (same date as the full report)
 - c. Versions: enter "v10.0.0" (see [ICT guidelines](#))
 - d. Related work: create links to the Full report and its chapter's figures and tables on Zenodo

- The assessment TSU publish the final laid out chapters on the time/date agreed with the secretariat. The assessment TSU changes the visibility of the previous version on Zenodo to “restricted access” once latest version is published as “Open Access”
- 4. Final laid out chapters’ figures and tables
 - The assessment TSU uploads the native (editable) format of the final laid out chapter figures and tables along with the file with caption and its data management report as a draft
 - The assessment TSU enters metadata of the final laid out chapter’s figures and tables on Zenodo as mentioned in the category Figures and Tables except for:
 - a. Visibility: select “Open access”
 - b. Publication date: date agreed with the secretariat (same date as final laid out chapters)
 - c. Versions: enter “v10.0.0” (see [ICT guidelines](#))
 - d. Related work: create links to its chapter on Zenodo
 - The assessment TSU publish the final laid out chapter figures and tables on the time/date agreed with the secretariat. The assessment TSU changes the visibility of previous version on Zenodo to “restricted access” once latest version is published as “Open Access”
- 5. Final laid out full report
 - The assessment TSU uploads the final laid out full report in PDF along with the supplementary materials for all the chapters (if any), references and citation files.
 - The assessment TSU enters metadata of full report on Zenodo:
 - a. Visibility: select “Open access”
 - b. Communities: select “IPBES”
 - c. Resource type: select “Publication/Report”
 - d. Title: enter “IPBES *Title of the Assessment Report: Full report*”
 - e. Publication date: date agreed with the secretariat (same date as final laid out chapters)
 - f. Creators: enter the name of experts appears in the citation of full report along with their affiliation and ORCID if available
 - g. Description: add short description of the upload
 - h. Additional Description: enter “Suggested citation: *citation of full report agreed by experts and the secretariat*”
 - i. Licenses: select “Creative Commons Attribution 4.0 International”
 - j. Contributors: select “Editor” role and enter the names of Review editors along with their affiliation and ORCID if available (in any)
 - k. Contributors: select “Other” role and enter the names of Contributing authors along with their affiliation and ORCID if available (if any)
 - l. Keywords and subjects: add “IPBES”, “Assessment”, and relevant terms
 - m. Versions: enter “v10.0.0” (see [ICT guidelines](#))
 - n. Related works: create links to SPM and chapters on Zenodo
- 6. Factsheets
 - See FACTSHEETS for more information
- 7. Data management report
 - See DATA MANAGEMENT REPORTS for more information

IPBES WEBSITE AND NOTIFICATIONS

| # | Task | Milestone | Responsibility |
|---|--------------------------------------|------------------|-------------------------------|
| 1 | Assessment page on the IPBES website | Phase 1, Ongoing | Secretariat Assessment TSU |

| | | | |
|---|------------------------------------|------------|-------------------------------|
| 2 | External review notifications | Phases 2-3 | Secretariat Assessment TSU |
| 3 | Upload of documents on the website | Phase 2-5 | Secretariat |

1. Assessment page on the IPBES website (Phase 1, Ongoing)
 - The IPBES Secretariat creates a dedicated page on the IPBES website and grants admin access to the assessment TSU
 - The IPBES Secretariat automatically lists all selected experts and management committee members on the assessment's page
 - The assessment TSU updates the description of the assessment when necessary (e.g., for each milestone)
 - The Secretariat creates new events (e.g., author meetings) and the assessment TSU updates the information (e.g., description, dates, location, meeting documents)
2. External review notifications (Phase 2-3)
 - The Secretariat, with support from the assessment TSU, drafts and sends a notification to announce the dates of the external reviews 6 weeks before the start of the review
 - The Secretariat may send a reminder a week before the end of the review
3. Upload of documents on the website (Phases 2-5)
 - The assessment TSU submits relevant documents (e.g., chapters, SPM, glossary) ahead of each milestone for the Secretariat to upload them on the IPBES website
 - Following Plenary, the assessment TSU provides documents and/or their associated DOIs to the IPBES Secretariat for them to link them on the IPBES website:
 - a. Full report
 - b. Factsheets
 - c. Media release
 - d. External review comments and their responses

EXTERNAL REVIEW MATERIALS

| # | Task | Milestone | Responsibility |
|---|----------------------------------|------------|---------------------------|
| 1 | List of external review comments | Phase 5 | Experts Assessment TSU |
| 2 | Review editors' reports | Phases 3-4 | Experts Assessment TSU |

1. List of external review comments (Phase 5)
 - The assessment TSU reviews the answers provided by experts to the comments received during the first and second external reviews, ensuring the elimination of all typos and inappropriate language;
 - The assessment TSU organizes comments and their corresponding responses into Excel files for each review, and for chapters and the SPM (typically, 3 files, but 2 files for fast-track assessments) for archiving. Each file consists of ten columns including the reviewer's full name (last, first), government affiliation(yes/no), chapter number, page references (from and to), line references (from and to), comments, and finalized responses. Additional columns may be incorporated to denote the reviewer's institutional affiliation and country.
 - The assessment TSU prepares a refined version of these Excel files, excluding comments originating from MEP and Bureau members, IPBES TSUs and non-registered reviewers. These files are also converted into pdf.

- The assessment TSU submits all files to the Secretariat for archiving and uploading on the IPBES website
- 2. Review editor's reports (Phases 3-4)
 - The assessment TSU ensures that review editors develop and sign a report per chapter for each external review.
 - The assessment TSU submits the review editors' reports of the first external review to the MEP and Bureau meetings following the third author meeting (Phase 3), and the review editors' reports of the second external review to the MEP and Bureau meetings following the submission of Plenary documents (Phase 4).

Recommendations:

- The assessment TSU is strongly advised to review and finalize the experts' answers to external review comments during Phase 4, as can also serve as a good preparation for the Plenary.
- The assessment TSU is strongly advised to coordinate with the IPBES secretariat on the design of the registration form for external reviews, in order to collect desired information to be listed in the list of reviewers as Annex of the full assessment report

| MEDIA OUTREACH MATERIALS | | | |
|---------------------------------|----------------------------------|------------------|--|
| # | Task | Milestone | Responsibility |
| 1 | Production of media primers | Phase 4 | Secretariat TSU Experts |
| 2 | Production of the media release | Phases 4-5 | Secretariat TSU Experts |
| 3 | Production of outreach videos | Phase 5 | Secretariat Assessment TSU Experts |
| 4 | Production of other media assets | Phase 4-5 | Secretariat Assessment TSU |

1. Production of media primers (Phase 4)
 - The Secretariat drafts a media primer in English for the assessment's TSU review and finalization. Note that language needs to be consistent with the scoping report.
 - The Secretariat translates the media primer in the 5 other UN languages and the assessment TSU coordinates with relevant experts to review the translations to ensure the correct use of technical and IPBES terms. Note that language needs to be consistent with the scoping report.
2. Production of the media release (Phases 4-5)
 - The Secretariat drafts a media release in English for the assessment TSU and co-chair's review prior to Plenary
 - The Secretariat, assessment TSU and co-chairs update the media release, reflecting the changes made to the SPM during Plenary
 - The Secretariat, assessment TSU and co-chairs finalize the media release, reflecting the negotiations made to the SPM shortly after the end of the negotiations
 - The Secretariat translate the media release in French and Spanish shortly after Plenary approval. The assessment TSU and relevant experts may assist in reviewing the translations.
3. Production of outreach videos

- The assessment TSU assists the Secretariat with the production of outreach videos by providing and/or reviewing scripts, video clips and other illustrations. Relevant experts may be consulted in the process.
- 4. Production of other media assets (Phases 4-5)
 - The assessment TSU prepares bio and photos of each co-chair for the Secretariat during Phase 4
 - The assessment TSU prepares a list of languages spoken by each co-chair and coordinating lead author for the Secretariat during Phase 4
 - The assessment TSU assists the Secretariat with the production of media assets by providing and/or reviewing scripts, video clips, photos and other illustrations in Phases 4-5. Relevant experts may be consulted in the process.

FACTSHEETS

| # | Task | Milestone | Responsibility |
|---|-------------------------------------|-----------|---|
| 1 | Selection and adaptation of figures | Phase 5 | Experts |
| 2 | Selection and adaptation of text | Phase 5 | Experts |
| 3 | Lay-out | Phase 5 | Graphic designer Secretariat Assessment TSU |
| 4 | Upload to Zenodo | Phase 5 | Assessment TSU |

1. Selection and adaptation of figures (Phase 5)
 - Experts select a number of figures from the report to be adapted for the
 - Selection and adaptation of text (Phase 5)
2. Experts extract relevant text from the final SPM
 - The assessment TSU and experts can edit the text noting that:
 - a. Changes must be minimal and substantial changes are not allowed
 - b. Key messages (bold text in the SPM) cannot be altered
 - c. Traceability statements must be retained
 - d. Text may only be edited to shorten statements and ensure grammatical consistency
3. Layout (Phase 5)
 - The assessment TSU ensures that the header, figures, and text fit on a 4-pager document
 - The assessment TSU submits the text and final figures to the Secretariat for final review shortly after Plenary
 - The Secretariat submits the final text, along with the appropriate disclaimer, to the graphic designer
4. Upload to Zenodo (Phase 5)
 - The assessment TSU uploads the final laid out factsheets in PDF as a separate Zenodo repository for each factsheet
 - The assessment TSU enters metadata for factsheets on Zenodo:
 - a. Visibility: select "Open access"
 - b. Communities: select "IPBES"
 - c. Resource type: select "Publication/Report"
 - d. Title: enter "IPBES *Title of the Assessment Report: Factsheet X – title of factsheet*"
 - e. Publication date: date agreed with the secretariat

- f. Creators: enter the name of authors agreed among experts and the secretariat along with their affiliation and ORCID if available
- g. Description: add short description of the upload
- h. Licenses: select “Creative Commons Attribution 4.0 International”
- i. Keywords and subjects: add “IPBES”, “Assessment”, and relevant terms
- j. Versions: enter “v10.0.0” (see [ICT guidelines](#))
- k. Related works: create links to SPM Zenodo