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The North Carolina Invasive Species Assessment System

GENERAL DESCRIPTION OF THE CRITERIA

The assessment criteria have been adopted from current available invasive assessments (Fox et al. 2005; Morse et al. 2004; Schutzki et al. 2004; and Warner et al. 2003) and modified for use in the North Carolina horticultural trade. Criteria are those that are likely to have resources and information available for a variety of species. The model is largely non-predictive and not intended to predict invasive attributes or prescreen species not currently utilized in the North Carolina horticultural trade; however, potential for further spread of existing species is considered.

For each main assessment question, an evaluator selects a response that corresponds to a particular point value. If information is unavailable to answer a particular question, the response is recorded as unknown, and no points are assigned. Numerical values assigned to criteria are for ranking purposes and to separate invasive from innocuous non-native species.

The assessment is based on a total of 100 points. Scores for Economic Value (section 4) are negative and subtract from the overall invasiveness rating and possible "do not sell" recommendation. Ecological Impacts (section 1) and Distribution and Invasive Potential (section 2) are evaluated within natural areas and may be assessed specifically for different geographic regions of North Carolina (Figure 2.1).

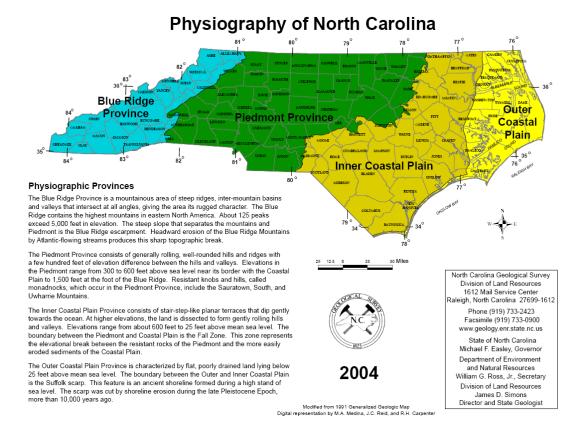


Figure 2.1 Physiography of North Carolina

Supporting information associated with the criteria will be recorded on the species'

Dataform and Score Sheet (Table 2.1).

Table 2.1 Species Dataform and Scoresheet

Species Dataform and Secresineet	Scoresheet	
Species:		
Native range:		
Date evaluated:		
	Answer Choices	Response
Introductory Questions		
1. Current federal and state regulations	Y/N	
Comments:		
2. Occurrence in the horticultural trade	Y/N	
Comments:		
3. North Carolina nativity	Y/N	
Comments:		
4. Presence in natural areas	Y/N	
Comments:		
5. Non-invasive cultivars	Y/N	
Comments:		
	Maximum Point	Number of Points
	Value	Assigned
Section 1. Ecological Impact		
1a. Impact on abiotic ecosystem processes	10	
Comments:		
1b. Impact on plant community structure	20	
Comments:	T	1
1c. Impact on species of special concern	5	
Comments:	T	1
1d. Impact on higher trophic levels	5	
Comments:	1	1
Section 1. Subrank	40	
Section 2. Current Distribution and Potential		
for Expansion	_	
2a. Local range expansion	7	
Comments:	1.0	T
2b. Long-distance dispersal potential	13	
Comments:	T	T
2c. Reproductive characteristics	8	
Comments:		

Table 2.1 Continued

Table 2.1 Commuted	ı	
2d. Range of communities	6	
Comments:		
2e. Similar habitats invaded elsewhere	6	
Comments:		
Section 2. Subrank	40	
Section 3. Management Difficulty		
3a. Herbicidal control	5	
Comments:		
3b. Nonchemical control methods	2	
Comments:		<u> </u>
3c. Necessity of individual treatments	2	
Comments:		<u> </u>
3d. Average distribution	2	
Comments:		·
3e. Likelihood for reestablishment	2	
Comments:	1	1
3f. Accessibility of invaded areas	2	
Comments:	1	1
3g. Impact on native species and environment	5	
Comments:		1
Section 3. Subrank	20	
Section 4. Benefits and Value		
4a. Estimated wholesale value	-7	
Comments:		
4b. Percentage of total sales	-5	
Comments:		
4d. Ecosystem services	-1	
Comments:	1	1
4e. Wildlife habitat	-1	
Comments:		•
4f. Cultural and social benefits	-1	
Comments:	•	•
Section 4. Subrank	-15	
Overall Score	100	
Overall Recommendation:	ı	ı
Summary:		
·		
References:		

INDEX CATEGORIES AND POINT VALUES

Table 2.2 Index categories and associated maximum point values in the North Carolina Invasive Species Assessment System

Index Category	Maximum Points
1. Ecological Impact	+40
2. Distribution and Invasive Potential	+40
3. Management Difficulty	+20
4. Benefits and Value	-15

OVERALL TAXON EVALUATION SCORES AND RECOMMENDATIONS

Highly invasive and not recommended for horticultural use: These species present relatively high ecological impact, distribution and invasive potential, and management difficulty in relation to economic value. (Overall Score: 67 - 100)

Moderately weedy and recommended for use with specific guidance: These species have less than high ecological impact, distribution and invasive potential, and management difficulty in relation to economic value. These plants should not be grown in close proximity to natural areas that have communities similar to those where this plant has been found to naturalize or near natural areas that have sensitive or threatened plants and/or natural communities. (Overall Score: 34-66)

Noninvasive and recommended for use: These species have limited ecological impact, distribution and invasive potential, and management difficulty in relation to economic value. They may be locally problematic but their reproductive biology and other traits limit their rate of invasion to natural areas. (Overall Score: 0-33)

Evaluated but not listed - These species may be potentially invasive, but additional information is necessary for further evaluation and conclusions.

KEY DEFINITIONS AND TERMS USED IN THE ASSESSMENT

<u>Alien/Non-native Species</u>: A species found outside their natural range as a result of human activity.

Naturalized: A non-native species that establishes self-perpetuating populations.

<u>Invasive</u>: According to the National Invasive Species Council (2006), invasive species are non-native species whose introduction causes or is likely to cause economic or environmental harm or harm to human health that outweighs any benefits.

Natural Areas: Ecosystems that are primarily managed to be in a natural state. Areas immediately adjacent (<10 meters) to roads and trails should not be included in assessments of natural areas.

Noxious Weed: According to the 1974 Federal Noxious Weed Act, a noxious weed is any plant in any stage of development, including parasitic plants whose presence whether direct or indirect, is detrimental to crops or other desirable plants, livestock, land, or other property, or is injurious to the public health. Noxious weeds are regulated by the federal government and state governments.

ENDANGERED, THREATENED, AND SPECIAL CONCERN SPECIES

In North Carolina, Endangered, Threatened, and Special Concern species have legally protected status in North Carolina through the North Carolina Plant Conservation Program (NC PCP), a unit of the North Carolina Department of Agriculture and Consumer Services. The NC PCP acts to maintain state lists of rare plant taxa, manage conservation programs, develop regulations, and issue permits concerning protected plants (Buchanan and Finnegan 2008). Endangered, threatened, and species of special concern are defined according to the guidelines of

the North Carolina Plant Protection and Conservation Act of 1979 (General Statutes, Article 19B, 106: 202.12_22).

North Carolina Species Status Definitions

Endangered: Any species of higher taxon of plant whose continued existence as a viable component of the State's flora is determined to be in jeopardy. Endangered species may not be removed from the wild except when a permit is obtained for research, propagation, or rescue which will enhance the survival of the species.

<u>Threatened</u>: Any resident species of plant which is likely to become an endangered species within the foreseeable future throughout all or a significant portion of its range. Removal regulations are the same as for Endangered species.

Special Concern: Any species of plant in North Carolina which requires monitoring but which may be collected and sold under regulations adopted under the provisions of the Plant Protection and Conservation Act.

The North Carolina Natural Heritage Program maintains a database of state-level and federal legal status information (Buchanan and Finnegan 2008). Federally-listed Endangered and Threatened species and Species of Concern are defined according to the guidelines of the Endangered Species Act of 1973 (Section 3) and determined by the U.S. Fish and Wildlife Service (USFWS) and the U.S. National Marine Fisheries Services.

United States Species Status Definitions

Endangered: Taxa that are in danger of extinction throughout all or a significant portion of its range.

<u>Threatened</u>: Taxa that are likely to become endangered within the foreseeable future throughout all or a significant portion of the occupied range.

Species of Concern: A species under consideration for listing, for which there is insufficient information to support listing at this time. The USFWS works with the States and other private and public interests to assess their need for protection under the Endangered Species Act.

ASSESSMENT QUESTIONS

INTRODUCTORY SCREENING QUESTIONS

Complete the following five questions to determine whether a species should be evaluated. To be eligible for assessment, a species must be currently not listed as a federal or state noxious weed, non-native and sold in the horticultural trade in North Carolina, and present or suspected to be present in natural areas in North Carolina.

1. Current Federal and State Regulations

Is this species listed on a federal or North Carolina noxious or prohibited plant list?

Yes = Stop. If this species is listed as a noxious weed, do not evaluate. Instead, list this plant as an invasive species not recommended for use.

No = Continue with the assessment.

2. Occurrence in the Horticultural Trade

Is this species sold in the horticultural trade in North Carolina?

Yes = Continue with the assessment.

No = Stop. A species must be sold in the horticultural trade to be eligible for evaluation.

3. North Carolina Nativity

Is this species native to North Carolina?

Yes = Stop. A species must be non-native in North Carolina to be eligible for evaluation.

No = Continue with the assessment.

4. Presence in Natural Areas

Is this species known or suspected to be present in natural areas within any of the four Physiographic Provinces (Blue Ridge Province, Piedmont Province, Inner Coastal Plain, Outer Coastal Plain) of North Carolina? Counties contained in each Province are identified in Figure 2.1.

Yes = If this species is present in two or more nonadjacent provinces, assess this species on a state-wide level. However, if this species is present in natural areas in only one of the four province or two adjacent provinces, complete the assessment for this province or region only.

No = Stop. A species must be present or suspected to be present in natural areas to be to be eligible for evaluation. The assessment model is designed to evaluate horticultural species that may escape cultivation and invade undisturbed natural vegetation.

5. Non-Invasive Cultivars

Is this a specific cultivar that has been rigorously tested and determined to be seedless and does not produce viable seeds or vegetative propagules that disperse widely under natural conditions?

Yes = Stop. If the cultivar is considered to be non-invasive, this assessment is not relevant. Data and/or reviewed scientific publications must be provided to substantiate this claim.

No = Continue with the assessment.

SECTION 1. ECOLOGICAL IMPACT

Consider the known ecological impacts in natural areas where it is most prevalent (worst case) without, or before, any control effort.

1a. Impact on Ecosystem Processes and System-Wide Parameters – 10 points

Does this species substantially alter abiotic ecosystem processes and system-wide parameters in ways that may diminish the survival of native species?

Examples of abiotic processes include:

- Fire occurrence, frequency, and intensity
- Geomorphological changes such as erosion and sedimentation rates
- Hydrological regimes, including soil water table
- Nutrient and mineral dynamics, including salinity, alkalinity, and pH
- Light availability

Not known to impact ecosystem processes (0 points)
Influences ecosystem processes (e.g., has perceivable, but mild influence on soil
nutrient availability) (4 points)

Significant alteration in ecosystem processes (e.g., increases sedimentation rates along
coastlines, reducing open water areas that are important for waterfowl, alters nutrient and
mineral dynamics to levels that favor non-native potentially invasive plants at the
expense of native species) (7 points)
Major, possibly irreversible, alteration or disruption of ecosystem processes (e.g.,
changes fire regimes, plant reduces water level from open water or wetland system,
changing habitats) (10 points)
1b. Impact on Plant Community Structure and Composition – 20 points
Does this species alter the plant community, composition, or vegetation structure?
No significant impact. Scattered presence, but no substantial effect on species
composition or structure (0 points)
Minor effect on species composition or structure (e.g., found in patches, but
represents <10% cover throughout any vegetation layer of any one successional state)
(5 points)
Influences community composition. Wide spread (e.g., > 10% cover throughout one
vegetation layer of at least one successional stage, reduces the number of individuals
in one or more native plant species) (10 points)
Significantly alters community composition. Prevalent (e.g., > 25% cover throughout
one vegetation layer over multiple successional stages, substantially reduces the
number of individuals in one or more native plant populations) (15 points)

Causes major alterations in community composition (e.g., > 50% cover throughout
one vegetation layer over multiple successional stages, results in the extirpation of
one or more native species, reducing biodiversity) (20 points)
1c. Impact on Species of Special Concern or Threatened or Endangered Plants – 5 points
Does this species impact rare plants, species of special concern or threatened or endangered
plants?
Not known to impact rare/endangered native plant species or unique plant communities.
(0 points)
Co-habits with species of special concern, threatened, or endangered native plant
species, but not known to have a direct impact on them. (2 points)
Known to inhabit vulnerable communities and displace or negatively impact species
of special concern, threatened, or endangered native species. (5 points)
1d. Impacts on Higher Trophic Levels – 5 points
Does this species have a cumulative effect on animals (nesting or foraging sites, habitat
connectivity, migration corridors), including pollinators? Does this species act as a host plant or
provide overwintering for insect pests or pathogens that damage crop plants or native vegetation
in North Carolina? Does this species act as a host plant for insect pests that present a threat to
human health?
Not known to impact higher trophic levels (0 points)

May modify some animal behavior or health, reduces food, reproduction, or cover. (1
point)
Impacts animal species composition displaces certain species. May act as a host plant
for insect pests or pathogens that damage crop plants or present a threat to human health
(3 points)
Known to act as a host plant for insect pests or pathogens that damage crop plants,
native species or present a threat to human health. (5 points)
SECTION 2. CURRENT DISTRIBUTION AND POTENTIAL FOR EXPANSION
(INVASIVE POTENTIAL)
On a state level, an assessment is made for zones where the plant has and has not invaded.
2a. Local Range Expansion or Change in Abundance – 7 points
Is the overall range (extent of distribution) of this species increasing? Consider whether the range
of the species is expanding, not is it filling in at higher infestation densities within its known
range. Document any management activity that may be controlling the species.
The range of this species had not increased over the past 10 years. (0 points)
The range of this species has increased slightly over the past 10 years (1 point)
The range of this species has moderately increased, but not doubled, over the past 10
years. (4 points)
The range of this species is increasing rapidly and has doubled statewide in <10 years.
(7 points)

2b. Long-Distance Dispersal Potential Within Region – 13 points

What is this species' potential for natural long-distance dispersal? Is this species spread by animals (including unintentionally by people) or abiotic mechanisms that can move seed, roots, stems, or other propagules over a long distance (> 1 km)?

Examples of natural long-distance dispersal mechanisms include:

- the species/fruit or seed is commonly consumed by birds or other animals that travel long distances (fleshy fruit, dispersed by birds)
- the species' fruits or seeds are sticky or burred and cling to feathers or hair of animals;
- the species has buoyant fruit, seeds, or other propagules that promote long-distance wind or water dispersal;
- the species, or parts of it, can detach and disperse seeds as the plants or plant parts are blown long distances.

 _ This species is not dispersed long distances. (0 points)
 _ This species exhibits low rates of long distance dispersal (3 points)
 _ This species exhibits examples of long-distance dispersal mechanisms. (8 points)
 _ This species exhibits examples of long-distance dispersal mechanisms and is known
to be dispersed long distances. (13 points)

2c. Reproductive Characteristics/Biological Character – 8 points

Does this species have reproductive characteristics typical of invasive plant species? Check all that apply. Note any reproductive factors not listed that may suggest potential aggressiveness.

 Populations of this species reproduce readily by seed (2 points)
 _ Seeds germinate in a wide range of conditions (2 points)
 _ This species fragments easily and fragments can become established elsewhere. (2
points)
This species resprouts readily when broken or cut. (2 points)

2d. Range of Communities in Which Species is Invading – 6 points

How many community groups or habitats does this species invade in North Carolina?

This question rates the number of primary natural community systems a species has invaded in North Carolina as an indication of the diversity of ecological types affected. Species that invade a variety of natural communities are more likely to have broad environmental tolerances and wide-ranging impacts compared with species that are restricted to a limited number of communities. The natural communities of North Carolina listed below are characterized by plant and animal composition, topography, substrate, hydrology, and soil characteristics (Shafale and Weakley 1990).

Complete Table 2.3 below by marking presence or absence of a species in each of the primary systems. A list of the natural communities associated with each system is included for your information.

If the species occurs only along the transportation corridor in any of the natural
communities, it is not considered to have yet invaded these systems. However, it should be noted
in the summary datasheet that the species has been found adjacent to the ecological type.
This species invades a limited range of communities (1 primary system). (2 points)
This species invades a moderate range of communities (2 primary systems). (4 points)

Table 2.3 Natural Communities of North Carolina, as defined by Shafale and Weakley (1990)

	Primary Systems	Natural Communities	Status
1	High mountain	Fraser fir forest, red spruce-fraser fir forest,	
	communities	grassy bald, heath bald, high elevation red oak	
		forest, montane white oak forest, northern	
		hardwoods forest, boulderfield forest	
2	Low elevation	Rich cove forest, acidic cove forest, Canada	
	mesic forests	hemlock forest, mesic mixed hardwood forest,	
		basic mesic forest	
3	Low elevation dry	Carolina hemlock bluff, white pine forest,	
	and dry-mesic	pine/oak heath, chestnut oak forest, piedmont	
	forest and	forest, mountain oak-hickory forest, dry oak-	
	woodlands	hickory forest, dry-mesic oak-hickory forest,	
		basic oak-hickory forest, xeric hardpan forest,	
		piedmont longleaf pine forest	
4	Rock outcrop	High elevation rocky summit, high elevation	
	communities	granitic dome, low elevation rocky summit, low	
		elevation granitic dome, montane acidic cliff,	
		piedmont/coastal plain acidic cliff,	
		piedmont/coastal plain heath bluff, montane or	
		piedmont cliff, montane or piedmont calcareous	
		cliff, coastal plain marl outcrop	
5	Communities of the	Dune grass, maritime dry grassland, maritime	
	coastal zone	shrub, maritime evergreen forest, maritime	
		deciduous forest, coastal fringe evergreen forest,	
		coastal fringe sandhill	
6	Sandy woodlands	Mesic pine flatwoods, pine/scrub oak sandhill,	
	of the coastal plain	xeric sandhill scrub	
7	River floodplains	Sand and mud bar, rocky bar and shore, coastal	
		plain levee forest, cypressgum swamp, coastal	
		plain bottomland hardwoods, coastal plain small	
		stream swamp, piedmont/mountain swamp forest,	
		piedmont/mountain bottomland forest, floodplain	
		pool, piedmont/low mountain alluvial forest,	
		montane alluvial forest	
8	Nonalluvial	Swamp forest-bog complex, Southern	
	wetlands of the	Appalachian bog, Southern Appalachian fen, high	
	mountains and	elevation seep, spray cliff, upland pool, upland	
	Piedmont	depression swamp forest, hillside seepage bog,	
		low elevation seep	

Table 2.3 Continued

9	Wet nonalluvial	Wet Marl forest, nonriverine wet hardwood	
	forests of the	forest, nonriverine swamp forest	
	Coastal Plain		
10	Pocosin and	Low pocosin, high pocosin, pond pine woodland,	
	peatland	peatland Atlantic white cedar forest, bay forest,	
	communities of the	streamhead pocosin, streamhead Atlantic white	
	Coastal Plain	cedar forest,	
11	Wet savanna of the	Wet pine flatwoods, pine savanna, sandhill seep	
	Coastal Plain		
12	Coastal Plain	Vernal pool, cypress savanna, small depression	
	depressions and	pond, natural lake shoreline	
	water bodies		
13	Nontidal coastal	Maritime wet grassland, maritime swamp forest,	
	fringe wetlands	maritime shrub swamp, interdune pond, estuarine	
		fringe loblolly pine forest	
14	Freshwater tidal	Tidal freshwater marsh, tidal cypress-gum swamp	
	wetlands		
15	Estuarine system	Salt marsh, brackish marsh, salt flat, salt shrub	
16	Marine system	Upper beach	

2e. Similar Habitats Invaded Elsewhere – 6 points

Has the species invaded comparable habitat types elsewhere that exist in North Carolina, but which it has not yet invaded? Identify other areas where this species has been identified as a problem and consider whether this species has invaded ecological types in other states or countries outside its native range that are analogous to ecological types not yet invaded in North Carolina. It is helpful to complete Question 2d above before responding to this question. If a species has been shown to invade a community type in North Carolina, and it was documented above in Question 2d, it does not receive additional points here in Question 2e for invading the same community type in another state. No points are assigned here if a species invades elsewhere but only in ecological types that it has already invaded in North Carolina. This information regarding suitable habitat-types is useful in determining the potential for additional spread within North Carolina.

This species has not invaded comparable habitat types elsewhere. (0 points)
This species has invaded 1 ecological type, in a similar climate, elsewhere that exists,
but is not yet invaded in North Carolina (2 points)
This species has invaded 2 ecological types, in similar climates, elsewhere that exist,
but are not yet invaded in North Carolina. (4 points)
This species has invaded 3 or more ecological types, in similar climates, elsewhere
that exist, but are not yet invaded in North Carolina. (6 points)
SECTION 3. MANAGEMENT DIFFICULTY
This section addresses factors that increase the difficulty of management for potentially invasive
species. Responses should be considered for areas without, or before, any efforts to control a
species.
Management Difficulty
3a. Is this species well-controlled by herbicides labeled for use in the invaded sites? –
<u>5 points</u>
This species is well-controlled using herbicide applications. (0 points)
This species is well-controlled using a limited variety of herbicides applied at precise
times of the year. Herbicide management must follow a strict protocol to be effective,
and control is not consistent (3 points)
This species is not well-controlled by herbicides registered for use in the invaded sites
or this species has shown evidence of herbicide tolerance. (5 points)

3b. Are nonchemical control methods effective? – 2 points		
This species is well-controlled using nonchemical control methods such as hand-		
pulling, mowing, disking, grazing, flame or biological control (0 points)		
Nonchemical control methods provide moderate control of this species (1 point)		
Nonchemical control methods are not effective treatments for managing this species.		
(i.e., hand-pulled plants often break and resprout later, the invaded sites should not be		
disturbed, the invaded sites are too remote for weeding crews and volunteers to easily		
access the area) (2 points)		
3c. Are individual treatments necessary? – 2 points This species can be controlled broadly and individual plants treatments are not		
necessary.(0 points)		
Individual plant treatments (e.g., cut stem applications) are necessary. (2 points)		
3d. What is the average distribution pattern of this species? – 2 points		
The average distribution pattern of this species is a discrete patch formation (0 points		
There is often variability in the distribution of this species (1 point)		
This species is often distributed in diffuse stands (2 points)		

<u>3e. What is the likelihood for reestablishment of this species following management treatments? – 2 points</u>

Following the first year of control of this species, it would be expected that sites of former
populations would require re-survey or re-treatment, due to recruitment from persistent seeds,
spores, or vegetative structures, or by dispersal from outside the site:
Re-treatments are generally not warranted; or regrowth not known. (0 points)
Re-treatment may be made in 2 to 3 years, or spot treatments to limited re-growth
over the next 2 to 5 years. (1 point)
Annual re-treatment is necessary for 3 or more years, skipping a year of treatment
may result in a return to the original infestation density. (2 points)
3f. Accessibility of Invaded Areas – 2 points
Is this species found in inaccessible areas?
No. (0 points)
Yes, and a limited area cannot be reached easily by vehicle or cannot easily be treated
by an individual carrying a backpack sprayer or hand-held tool. (1 point)
Yes, and much of the area cannot be reached easily by vehicle or cannot easily be
treated by an individual carrying a backpack sprayer or hand-held tool. (2 points)

Non-Target Impacts

3g. Impacts of Management on Native Species and the Environment – 5 points

Does the management of this species negatively impact native species and the environment? Species that are difficult to control without significant damage to native species may be:

widely dispersed (i.e., does not occur within discrete clumps or monocultures); attached to native species (e.g., vine, epiphytes or parasite); easily mistaken for a native plant; significant soil disturbance would result from control measures. The management of this species does not negatively impact native species or the environment. (0 points) The management of this species may negatively impact native species or the environment. (2 points) The management of this species is known to negatively impact native species and the environment. (5 points) **SECTION 4. BENEFITS AND VALUE** This section weighs the economic, environmental, and social benefits of a species against the ecological risk of potential invasiveness. Negative point values subtract from the overall invasiveness scale and likelihood of not recommending a plant for sale. 4a. Estimated Wholesale Value in North Carolina What is the estimated annual wholesale value attributed to this species? _____ > \$40 million (-7 points) _____ > \$30 million (-6 points) _____ > \$20 million (-5 points) _____ > \$10 million (-4 points)

> \$5 million (-3 points)
> \$1 million (-2 points)
> \$100,000 (-1 point)
4b. Percentage of Wholesale and/or Retail Sales
Among the producers that sell this species, the highest percentage of total sales attributed to this
species from any one grower is estimated to be:
> 50% (-5 points)
26-50% (-4 points)
11-25% (-3 points)
6-10% (-2 points)
1-5% (-1 point)
4c. Ecosystem Services
This plant is currently used for erosion control, storm water management, phyto-remediation,
bank stabilization, windbreaks, and/or modifying microclimates.
No (0 points)
Yes (-1 point)
4d. Wildlife Habitat
This plant is currently used for wildlife management (food, cover, etc.)
No (0 points)
Yes (-1 point)

4e. Cultural and Social Benefits.

This plant provides unique	cultural and social benefits that provide intrinsic value.
No (0 points)	
Yes (-1 point)	

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