A scientist's guide

Open publishing

A practical guide
for researchers

UNIVERSITY
OF LODZ

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Contents

1. Why do we need scientific publications?

Many researchers perceive a scientific publication as an excess: if we do specific research work and we have the results, why should we write about them? However, let us ask ourselves a question: who, apart from a small team of our colleagues, will learn about the effects of this research, if we do not publish them – in the form of an article, monograph, conference presentation, scientific poster or even raw research data? When choosing a scientist's profession, we should be aware of the fact that it is not only a profession or a way of life, but also a certain social mission. As employees or students of a specific university – the University of Lodz – we are obliged to carry out the *mission of the university.*

The history of scientific publishing is very long, it goes back to 1665. Since that time a lot has changed and the changes are progressing faster and faster – certainly while writing this the guide, some changes are taking place that we will learn about in a moment. We have moved from the system of publications assessed by editors of scientific periodicals, to the system of peer reviews, and even to the so-called double-blind peer review. Scientific journals are developing dynamically, new ones are created every day: several dozen periodicals are affiliated with the University of Lodz – 46 were on the ministerial list of scored journals in 2020 – and huge scientific databases register thousands of them (DOAJ database includes over 16,000 titles in 80 languages). Navigating the publishing world is becoming art.

1.1. Presentation of research results

Sharing research results should be an obvious value for every scientist. We write more about the benefits of sharing research results in the section devoted to open access publications; however, it is enough to mention contributing to the development of Science, establishing contacts, national and international, self-development possible thanks to the exchange of experiences or about raising the rank of the university and obtaining funds for further research. As researchers, we must meet many expectations: society, employing institution, research funding institutions, business partners… Publishing may be the best way to do this.

- Most reputable universities are state-owned, and therefore, funded by citizens. It should come as no surprise that we are obliged to present the results of research conducted thanks to public funds. Publication, especially publication in the open access model, means that when asked about what we do for the society, we can point to a specific place on the web and say: exactly this. Closing the scientist „in the ivory tower" is not a glorious practice today.

- As employees of a specific institution, we must demonstrate the effects of our professional activity. In the case of a scientist, this is research, and evaluation of science, although arousing much controversy and having side effects in the form of „obsession about scores", turns out to be the only way to assess it. Effective publishing, about which we write below, enables to go through this process painlessly and count on scientific advancement.
- Getting additional research funding allows for faster professional development, but requires a researcher to meet some new expectations – this time requirements of the institution that is funding the research. Funders require tangible outcomes, and more and more of them often clearly indicate publication paths. Getting familiar with publishing opportunities is a method to always easily fit into the competition requirements.

Everyone expects from a researcher the same thing: publishing research results. Whether or not scientific texts are read, remains a separate matter – there are scientific publications understandable to an average member of a society, but there are also works that are understandable only to experts in a given field. Regardless of which group we include our research into, there are ways to interest a recipient with it and fulfil the publication obligation without any major problems.

1.2. Dissemination and popularisation of science

Presenting results of scientific research to a wider audience is one of the most important tasks a university – and a researcher – have to face. It is worth remembering that disseminating the results, for example in the form of publications in an indexed scientific journal, is not equivalent to popularising science.

Dissemination – i.e., inclusion of given works and research results into the academic circulation, i.e., making them available by scientists to other scientists. In order to disseminate, e.g., publications, industry communication channels are used: scientific databases, repositories, scientific search engines, portals such as ACADEMIA, ResearchGate or Google Scholar.

Communication – i.e., presentation of research results in a way that is understandable to people from the outside of the academy and in generally accessible places. Researchers themselves can popularise science and they often do so: during science festivals, science picnics, on blogs and authors' websites, during meetings with high school students or as supervisors of science clubs. Other people also deal with it: journalists, librarians, students, PR specialists and people dealing with promotion or press office employees.

Units employing scientists do not require them to be popularisers of science – this mission is usually carried out by researchers on their own initiative, resulting from the need to bring science closer to the people unrelated with the activities of the university. On the other hand, dissemination of research results is becoming a standard requirement.

Communication between science and business remains yet another issue – today scientific units have to make entrepreneurs interested in their research. This type of communication can be treated as a branch of popularising science, but it should be remembered that today social influence is one of the criteria for evaluating research units and is an element of evaluation.

As Natalia Osica notes in an article devoted to this issue, we cannot carry out all these tasks simultaneously: a scientist can and should count on the support on the side of his/her university, both in terms of popularising science and communication with business. We hope, that this guide will help disseminate scientific publications.

1.3.   Publishing versus depositing / archiving

In the section devoted to open publishing models, we introduce the concept of „Gold Open Access" and the „Green Open Access", for which it will be important to distinguish between publishing and depositing scientific texts. Every author should be aware of it.

Publishing – always overriding, researchers are first and foremost held accountable for it by the employing unit or research funding institutions. A scientific article and scientific book/monograph are the most prestigious methods of publishing research results. The reviewed post-conference volumes are also worth noting, but it is important to pay attention to whether they meet the criteria imposed by the scientific unit and the funder. The review process is very important because it because it proves the value of a publication – if an article is successfully reviewed, edited and published in a periodical important for the discipline, it allows to assess credibility of the researcher. We write more about scientific journals, publishing houses and the peer review process in the further part of the guide.

Depositing/archiving – can be the second stage after having the text published, or the only one if we decide to deposit an unpublished text. Repositories are the best place to deposit texts. We write more extensively about them later, because repositories ensure your publication is as secure as possible. We can archive the published version of an article or a book, as long as the publisher agrees or the version before publication. We can also deposit unpublished texts, but we should remember that even a repository offering persistent ID of a document will not replace a publisher – depositing is not the same as publishing. So if a funder expects publication, it is not enough to deposit the research results in the repository or another digital archive, or post them on the author's website or even on a research portal.

1.4. Preprint and postprint

Two terms that are popular in the science-related discourse are worth remembering in the context of depositing texts:

* **Preprint** –– formerly known as a manuscript, it is an unpublished version of a work, prepared by the author, devoid of any specific formatting for a specific magazine or publisher (layout). This is the version before the review process, although in some places you can find a definition according to which a preprint is a reviewed and revised version, which is only devoid of the layout. However, most publishers stick to the first definition. Such a preprint can be deposited by an author but it is always worthwhile to first understand the difference and make sure about this point.
* **Postprint** – the final version of a text, after reviews and corrections, adapted to specific publisher requirements and ready for publishing. You have to remember that to deposit a postprint in the repository or on your website, we need the consent of the publisher or license information that allows it. We can check the publishing policy in the *Sherpa Romeo database* or *Most Wiedzy*.

 It is also worth remembering about functioning of such terms as the author's accepted manuscript and the version of record

Find out more...

- *Mission of the University of Lodz* [PL] [ENG]

- *Research data – a guide for researchers [access for UL employees]* [PL] [ENG]

- *Employee knowledge database [access for UL employees]* [PL] [ENG]

- *Repository of the University of Lodz* [PL] [ENG]

- *Martínez A., Mammola S. (2021), Specialized terminology reduces the number of citations of scientific papers* [ENG]

- *Liśkiewicz T., Liśkiewicz G. (2014), Wprowadzenie do efektywnego publikowania [Introduction to effective publishing*] [PL]

- *Koalicja Otwartej Edukacji [Coalition for Open Education]* [PL]

- *Sherpa Romeo - check publishing policy [ENG]*

- *Most Wiedzy – sprawdź politykę wydawniczą [Most Wiedzy - check publishing policy]* [PL] [ENG]

- *Wpływ społeczny – nowe kryterium oceny działalności naukowej [Social impact – a new criterion for the evaluation of scientific activity]* [PL]

- *Nauka mówi coraz więcej. Uporządkujmy terminologię [Science says more and more. Let's organize the terminology]* [PL]

2. Open Access Publishing – how does it work?

The open publishing model –or rather models, because we know more than one – is based on a set of rules and practices that enable sharing research results on the Internet, without any costs on the side of a recipient and without other barriers, such as paid software necessary to read the information. It is starting to be a dominant model in the world and Polish science.

In practice, does open access mean free learning, unencumbered by the system constraints? Or maybe it is just another tool for measuring science and a scientist's assessment? Both of these questions are correct, but the answer is neither yes or no. It's worth getting to know open access better, especially if we take into account the fact that research funding institutions have permanently introduced this concept into the science dictionary.

Open access logo. It can be found in many variants.
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2.1. Open Access policy

The growing popularity of open access and the gradual adaptation of this model in science made scientific units face the need to develop an internal, individual open access policies. This is how it is defined by the Open Education Coalition:

"The open access policy is a document that regulates issues related to open sharing the results of research conducted in scientific institutions and/or financed by the appointed for this purpose agencies and foundations. They may take the form of resolutions in which an institution recommends sharing research results in an open model, or firm mandates that contain a legal obligation for employees or fund recipients to publish their research work in open access. Open access policies bring a number of benefits to the institutions implementing them: they

improve knowledge management and evaluation, facilitate promotion of scientific achievements of an institution, and also contribute to greater transparency and responsibility for activities financed from public funds. More and more institutions in the world decide to introduce open access policies, seeing this solution as an opportunity for a systemic change in science communication."

Recommendations and even a model of the open access policy have been published by the Ministry of Education and Science (back then still the Ministry of Science and Higher Education). Two categories clearly emerge from it, to which open access in science is related:

- **Scientific publications** – first of all, the fight for open access is fought in the case of scientific articles published in peer-reviewed journals, but this is also the case of monographs/scientific books, chapters, conference materials or diploma dissertations.
- **Research data** – raw or processed data, on the basis of which scientific publications are created, are also discussed with respect to the issue of the open access model. We wrote about it more extensively in a separate guide on research data.

The institutional open access policy explicitly obliges members of the academic community to share the results of one's research – both in the form of publications and research data – in open journals, publishing houses, as well as to archive works in repositories.

2.2. Implementation of the open access policy - the University of Lodz

The University of Lodz has not yet adopted an open access policy understood as a regulatory document on the issues related to the open disclosure of research results conducted by the unit. However, the university authorities have initiated a number of activities aimed at introducing good practices related to open access to research and teaching.

- Announcement of the Rector of the University of Lodz of April 28, 2020 on the subject of implementation of the open access policy at the University of Lodz by enabling employees, doctoral students and students of the University of Lodz to deposit their works in the institutional repository in accordance with the recommendations of Ministry of Education and Science (back then the Ministry of Science and Higher Education) has been published.
- *The Repository of the University of Lodz*, operating since 2012, offers full access to scientific publications

and educational materials archived by employees, doctoral students and students of the University of Lodz.

- In 2020, at the University of Lodz the Rector's Representative for open access to publications and research results was appointed.
- The University of Lodz Library undertakes activities in the field of dissemination of knowledge about openness in science: open publishing programmes, training and consultations, periodic Open Access Week Seminar (since 2010) or guides like this one.

2.3. Open Access policy in Europe - „Plan S"

Polish institutional open access policies are based on recommendations and initiatives from the European Union. The model elaborated by the Ministry of Education and Science, the clearly indicated in 2020 policy of the National Science Centre regarding open access to publications, specifying publication paths and the attitude of the Director of the National Centre for Research and Development – they are all the result of activities aimed at implementation of the assumptions of „Plan S".

In 2018, an initiative called *cOAlition S* was created. This coalition, which has an acronym of „Open Access" in its name, has set itself the goal of introducing full, real openness of scientific publications from 2021. Its members include leaders of the largest European research and funding science agencies from the countries belonging to the Science Europe (Austria, Finland, France, the Netherlands, Ireland, Luxembourg, Norway, Poland, Slovenia, Sweden, United Kingdom, Italy) – Poland is represented by the National Science Centre – and the support is provided by the European Commission and the European Research Council. The document containing the cOAlition S action plan is called „Plan S" – it is an extension of the 2016 *„Amsterdam Call for Action on Open Science"*. You can read what the document exactly contains on the *Coalition's website*, but first of all it's worth knowing what the idea of openness presented in it looks like.

It is based on **10 principles of openness:**

1. The authors or institutions retain the copyright for publications made available on open licenses – Creative Commons license is recommended: CC-BY (Attribution of Authorship) and CC-BY-SA (Authorship Attribution-On the Same Conditions).

2. Clear criteria and quality requirements for journals, platforms and open repositories will be elaborated by members of the Coalition.

3. The founders are to encourage creation of journals and repositories in the open access model and to open those already existing ones and provide support.

4. Fees for open publications will be paid by institutions or funders, not by researchers themselves.

5. The funders are to support the variety of business models of open journals and platforms, but based on clear criteria – if publishing fees are required for open access publications, they must be commensurate with the services and quality provided, and clearly defined. Their financing will cease by December 31, 2024.

6. Research units (universities, research centres, libraries) should implement policies and strategies to ensure transparency.

7. The rules apply to all scientific publications; however, introduction of the open access model for books and book chapters will take longer – the guidelines will be developed by the end of 2021.

8. The founders do not support the so-called hybrid model of the publication, but if it is a model applied temporarily, they may provide financial support.

9. Funders should monitor beneficiaries' activities and react if they do not comply with the rules.

10. When deciding to fund research, funders judge the value of the research work itself, not the publisher, journal (indicators) or publication channel.

These principles complement the main **idea of „Plan S":**

"With effect from 2021, all scholarly publications on the results from research funded by public or private grants provided by national, regional and international research councils and funding bodies, must be published in Open Access Journals, on Open Access Platforms, or made immediately available through Open Access Repositories without embargo."

The creation of „Plan S" was a response to the international and transcontinental *Open Access 2020* initiative, the goal of which is to gradually phase out financial support for paid models of scientific publishing and the transition to the open access model.

Changes in the approach of leaders of the European research and research funding agencies can be seen in the *Horizon Europe* and Horizon 2020 programmes. They draw attention to ensuring open access to publications and research data – in accordance with the principle of „open as much as possible, closed as much as necessary "[1]. In the Horizon Europe programme there are very clear echoes of "Plan S": the requirement to make the publication available immediately, with no embargo, recommendations regarding CC licenses, gratification of those publications which are covered by the open access policy, underlining the role of repositories.

The strategic plan for 2021-2024 announced by *SPARC* Europe completes the direction in which institutions and organisations interested in scientific research are heading: openness, full access to research results, communication between researchers, centres, the business world and society. Open access to research and education is to become a standard in higher education and science.

2.4. Open publishing models

Open access can be implemented in various ways. The fact that readers can reach for a given article or a book in an electronic version without paying any fees does not mean that all publisher costs disappear. „Production" of a scientific journal issue or publication of a monograph also needs some financial resources: editorial preparation, paying for online space, providing remuneration to editors and reviewers. If a publisher does not receive any profits from the sale of a publication, these costs must be borne by the authors or research funding institutions. Many scientific journals benefit from ministerial funding, from advertising, and others charge fees from authors who have to acknowledge the fact that the cost of publishing a text in an open-ended journal may be higher than in a paid journal. Publication costs (the so-called APC, or article processing charge) are more and more often covered by institutions employing researchers and funders. The so-called open publishing programmes, about which we write more in the a section of the guide devoted to them, are a way out of this situation.

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[1] About FAIR principles in science and research data openness, see Research data. Practical guide for researchers, Library of the University of Lodz 2021

One of the mechanisms allowing for a change of the current model of functioning of scientific journals are transformative agreements. They allow for gradual resignation by publishers from fees for accessing content and replacing them with fees for publishing in the open access model; hence the „transformational" nature of these agreements. They are supposed to lead to a full transformation of scientific journals into an open model – *as assured by cOAlition S*, this should happen by the end of 2024.

Typically, when speaking of scientific publications, five basic models of open access are distinguished. These models often overlap one another to form hybrids or variants, and open access alone is changing along with the growing popularity among the scientific community, so it's worth treating these types as conventional and subject to change. In the Polish discourse around open publishing, they are referred to as „roads".

- **Green Road (Green Open Access)** – an author archives his/her own publication and makes it available for free on the Internet (self-archiving).
- **The Golden Road (Gold Open Access)** – a publication is immediately made available in open access, most frequently in a scientific journal that has adopted such a publication model. In this model publication fees (APC) are borne by the author or the research funding institution.
- **The Diamond/Platinum Road (Diamond/Platinum Open Access)** – sometimes considered to be a kind of the golden road in publishing, but it differs from it in that the journal does not charge for publication (APC). This model is most frequently used by journals financed from scientific journals support programmes.
- **The Brown Road (Bronze Open Access)** – publications are available on the Internet free of charge, e.g., on the publisher's website, but it is not clear on what terms these resources can be used. Currently, it is a very common publishing model, though knowledge about licensing and the policy of open access is not yet well established.
- **The Black Road (Black Open Access)** – includes all illegal ways of sharing publications, among others, free access to paid research articles, sharing links and access codes or pirated websites. Black Open Access also includes obtaining paid texts directly from their authors.

In addition to these five models, there is also a hybrid model or the so-called hybrid journals – they publish both open access and paid content. Most frequently such a publisher earns due to subscriptions, but provides only individual articles in the OA model, and the fee for their publication is borne by the authors or institutions.

It's worth knowing more especially about the two main open access publishing models – i.e., the Green and Golden Open Access. The differences between them are very significant from the point of view of research funding institutions.

2.4.1. Green Open Access

The green road is also called the road or path of open repositories. It is such a model of the distribution of a scientific publication (or other form of presentation of research results), in which an author archives the work independently and makes it available on the Internet, free of charge.

What do we share? An author can post different versions of their work on the web – most often preprints and postprints of scientific articles are deposited, but also "rough drafts" of the texts.

What can we share? Not every publisher will let you share the text that has been or is about to be published. So before an author posts his/her work on the web, he/she should get familiar with the journal's publishing policy or ask for the publisher's consent. Some publishers allow sharing authors's accepted manuscript, others even to "open" versions of record, some impose a time embargo (e.g., one or six months after the release of the sales version) or take away such an option altogether, but this happens extremely rarely.

How do we share? Term "the way of open repositories" comes from the most commonly chosen path of making the work available on the Internet, i.e., depositing it in a repository. We write about different types of repositories further in the guide, but it is worth remembering that we distinguish between institutional, general and domain-specific repositories, and open repositories can be easily searched through the OpenDOAR platform.

Who shares? An author of the text him/herself does it, which is why we are talking about self-archiving. The green road may be the only form of making a given work available in the open access model, but it may also complement the gold or platinum publishing paths.

2.4.2. Gold Open Access

The gold publishing model, next to the platinum/diamond publishing model, is considered the best and the safest form of opening a publication. Publications under this model are available for everyone, free of charge at the time of posting and the rules of their use are based on a clear publishing policy. Sometimes the public release of a publication is postponed in time and then we are talking about the „delayed open access" (called delayed OA), which we must be careful about in the case of publications under grants (e.g., the National Science Centre in the „OPUS 21" does not allow any time embargo).

What do we share? In the case of the golden road, we usually deal with the already reviewed, edited and published scientific articles, less frequently with publications in the form of a book.

What can we share? The rules for access to publications are set out in a transparent policy of a publishing house of a given journal. Articles are usually available under open licenses or in accordance with the copyright law. The journal's policy can be checked at Sherpa Romeo.

How do we share? Gold Open Access is the most frequently used by the peer-reviewed scientific journals with international scope. Getting published in such a journal is certainly prestigious, but the costs (APC) are borne by an author or institution, and they can be really high: from several hundred dollars or euros to several thousand. Hence the already mentioned open publishing programmes or transformational contracts and a hybrid model. Publications in the golden model are most often available on the website of a given publisher and/or on platforms intended for open publishing. Open journals, verified in terms of transparency of the publishing policy, can be found on the *DOAJ platform*.

Who shares? By deciding to publish in a journal that implements the golden model, we get rid of the responsibility for making the work available – it is done by the publisher. If we want to put the text also in the repository, on our website or on a scientific portal, we can do it – but we should always ask the publisher for the consent or check the license.

The diamond/platinum road (open access without publication fees) seems to be the ideal among the models of open publishing; however, it is still a rare solution today – it is based either on institutional funding or on the work of volunteers, which sometimes is associated with the low quality of a journal, as noted by Magdalena Szuflita-Żurawska. Authors usually have to choose between the Golden and Green Open Access.

Richard Poynder, a British journalist and specialist in science communication and open access, states:

"The dispute between the Golden and Green Open Access may increase in the short term, but - if nothing changes – the green OA will be gradually marginalised. Green options will undoubtedly continue to be accepted, but – as I have noted earlier – these expectations can also be met with the use of solutions typical of the golden OA. As long as the financial resources for the golden OA continue to grow, I expect that it will be the default solution."

2.5. Benefits of the OA model

Researchers are convinced at almost every step of the benefits of sharing publications in the open model. However, there is still a need to broaden knowledge on this subject and fight against perceiving something that is available for free as a lower quality product/service or in this case – science. A journal publishing in the diamond model may maintain all quality standards, even though it does not charge the authors. How is it possible? Open access is becoming the leading means of scientific communication, and therefore, research funding agencies allocate more and more funds to this model and offer various types of support – in the form of free repositories or platforms as well as tools facilitating the work of researchers and editors. Today, open access and free licenses are no longer associated with volunteering or low quality of resources.

Benefits for researchers

- Free access to research results from around the world immediately after their publishing.
- Quick sharing the results of your own research with scientists from the country and abroad.
- Easy scientific communication – greater and faster feedback, the possibility of results verification.
- Development of own research based on the available resources.
- Increasing the number of citations and indicators that measure science today. By sharing our publications on the web, we increase their visibility for scientific search engines and other tools, and thus - for other researchers.
- Ability to use accessible publications to create a digital resume that will always be available and transparent.
- *An increase in the social impact of science – publications available on the Internet are also imported to commercial databases, the research results can be used by entrepreneurs as well as artists, teachers or all those who are interested in science.
- Research transparency – plagiarism is much more difficult in the open access world.

- Meeting expectations of funders who increasingly often grant funds to the open access publications.
- Ensuring safety of publications thanks to archiving in repositories.
- Free promotion – also promotion of the employing unit, which translates into evaluation of an employee.

Benefits for the institution

- The increased visibility of employees' publications translates into an increase in the prestige of a specific employing unit.
- Facilitating implementation of administrative tasks, e.g., reports on the publication of research results or verification of the achievements of employees.
- Facilitating evaluation of researchers.
- Support for teaching – open resources can be used to organise activities or training for students.
- Better quality of education thanks to better quality of diploma theses – available in the open model high-quality scientific publications can be used successfully by students and doctoral students to improve the quality of their own work.
- Promotion of a university without additional financial resources.
- Facilitating monitoring of research in the fields of interest to the institution.
- Financial savings: on advertising and promotion of the university, on archiving works, on fees for providing employees with access to paid resources, on staff training.

Researchers who want to publish in the open access model can count on better and better support on the side of their units – universities authorities and leaders of research funding agencies are starting to see the great potential in openness and reward participation in its development.

Later in the guide, we discuss good practices related to drafting for publication in the open model and we present ways to find the best place to publish and deposit a scientific paper.

Find out more…

- *Polityka NCN dotycząca otwartego dostępu do publikacji (2020) [NCN policy on open access to publications (2020)]* [PL]

- *Polityka otwartości w programie Horyzont Europa [Openness policy in the Horizon Europe programme]* [PL]

- *Programy publikowania otwartego w ramach podpisanych licencji lub umów przez Uniwersytet Łódzki [Open source publishing programmes under signed licenses or contracts by the University of Lodz]* [PL]

- *Digital Library of the University of Lodz* [PL] [ENG]

- *Repository of the University of Lodz* [PL] [ENG]

- *Piwowar H, Priem J, Larivière V, Alperin JP, Matthias L, Norlander B, Farley A, West J, Haustein S. (2018), The state of OA: a largescale analysis of the prevalence and impact of Open Access articles* [ENG]

- *Kulczycki, E., Korytkowski, P. (2020). Otwarta nauka w świetle Polskiej Bibliografii Naukowej [Open Science in the Light of Polish Scientific Bibliography] DOI: 10.6084/m9.figshare.12204287* [PL]

- *Blog of Jeffrey Beall* [ENG]

- *Blog of Emanuel Kulczycki* [PL]

- *Dictionary of terms in the field of Open Access – AGH* [PL]

- *Publications about openness – KOED* [PL] [ENG]

- *SPARC Europe's strategic plan 2021-2024* [ENG] [FR] [ESP]

- *Raport na temat umów transformacyjnych [Report on transformative agreements]* [PL]

- *Transformative Agreements: Overview, Case Studies, and Legal Analysis* [ENG]

- *Brainard J., California universities and Elsevier make up, ink big open-access deal* [ENG]

- *Materials on open access - MEiN* [PL]

- *Report: Open-Access policies in Poland - KOED* [PL]

- *Swan A., Policy guidelines for the development and promotion of open access, UNESCO*

- *Digital Library* [ENG]

- *Noorden, R. van, Do you obey public-access mandates? Google Scholar is watching* [ENG]

- *Kto przyjął Plan S [Who has adopted Plan S]?* [PL]

- *Szuflita-Żurawska M. (2018), Międzynarodowy Tydzień Otwartego Dostępu [International Open Access Week]* [PL]

3. How to prepare a publication, **for it to be visible?**

Benefits of publishing in an open access model largely depend on visibility of our publication. The funders are satisfied that a given article or monograph has been published in the right journal; however, for the purpose of disseminating information about it and building its image and that of our unit, we need – as authors – to do more. It is worth doing it because universities appreciate the visibility of scientific publications – they are also expected to raise prestige and improve the results in various types of rankings, such as the so-called Shanghai list, i.e. *ARWU*, *The World University Rankings*, *US News* and *QS rankings*. The methodology for all these lists is based to a large extent on research visibility.

The websites of the Coalition for Open Education (KOED) and *OpenJournalSystems.com* are open and reliable places on the web where we can find tips on how to prepare a scientific publication so that it is visible to both a living reader and the machines, e.g. search engines or indexing databases. The most important of these recommendations are worth taking into account:

- publish in the open model;
- license publications – this will help others to know how they can use our work;
- archive publications and research data in a repository;
- use identifiers – persistent identifiers for publications (DOI, handle, etc.), and for a researcher ORCID ID;
- get familiar with the guides on copyright – it's worth knowing your rights and obligations, e.g., towards the publisher or employer;
- do not forget about the costs of publishing openly in grant estimates (many research funding agencies cover the costs of such publication!);
- take time to set up a citation profile in Google Scholar;
- try self-promotion – inform about your scientific achievements, e.g., on Twitter or scientific social networking sites;
- use the support of academic library staff on issues related to open publishing.

3.1. Scientific search engines – find yourself (in them)

Scientific and specialised search engines and databases – apart from traditional search engines – are the first place a researcher who is looking for information or research works on a given topic looks at today. Even librarians have to admit this, though many of them still would prefer a library or catalogue of collections to be such a place. Scientific libraries are well aware of the need to expand the range of services and many scientists are successfully using the help of librarians in searching e-resources. It is worth knowing what tools we can use ourselves and where to start searching.

- *Google Scholar* – the most popular scientific search engine that belongs to the Google company. It indexes scientific literature, including articles from peer-reviewed scientific journals, monographs, books, but also abstracts of texts or repository resources. This search engine, though searches texts from all disciplines, is important above all for the representatives of humanities and social sciences, which results from lower indexing of such works in other places. Emanuel Kulczycki, an expert in evaluation known to many scientists and scientific communication, has published an open guide How to add papers to Google Scholar and increase the number of citations and the Hirsch index (2013). Access to search results is provided free of charge, but both open access content and paid content are indexed.
- *BASE* – i.e., Bielefeld Academic Search Engine, let you search repository resources, scientific journals or digital collections using the OAI and OAI-PMH interfaces. As the owner of the search engine declares, we get access to about 60% of full texts (open access). The database is operated by the Universität Bielefeld, namely the university library.
- *DOI* – a search engine for finding resources with a persistent digital identifier DOI. It belongs to an international foundation associating publishing groups, journals and research institutes.
- *SweetSearch* – even though it presents itself as a search engine for students, it also serves researchers as a sort of „sieve" for Google searches: it shows results only from the verified content, located on the so-called white list. The search engine is managed by Dulcinea Media.
- **Fidkar** – a multi-search engine for library computer databases signed by the National Library.
- *Microsoft Academic* – a free of charge scientific publication search engine using technology of semantic search. It is a continuation of the closed Microsoft Academic Search project. It belongs to Microsoft and competes with Google Scholar and paid databases such as Scopus or Web of Science.
- *SciCentral* – searches resources mainly in medical, exact and technical sciences, selecting only those that are available in the open model for the most part.

- *Scopus* – a bibliographic and abstract multi-discipline database belonging to the Elsevier publishing house group. It includes scientific literature from all disciplines, but medical, technical and exact sciences as well as social sciences are represented there the strongest. Access to the database is paid, but researchers can access it through their institution, in the case of the University of Lodz, by the UL Library. Elsevier offers numerous training courses and tutorials on how Scopus works.
- *Web of Science Core Collection* – a database package offered by Clarivate Analytics. Just like in the case of Scopus database, the body of indexed texts and data covers mainly exact, medical and technical sciences, but we will find there all disciplines. Access to the database is paid, but researchers can access it via their institutions, in the case of the University of Lodz by the UL Library.

The listed search engines and databases are just a selection from among many other sources, and other sources can be found, among others, on the website of the University of Lodz Library. Employees of the Scientific Information and Research and Bibliometric Analysis Department of the UL Library conduct trainings in the field of use of this type of tools – information on ongoing training is available on the website, and additional information can be obtained by sending an e-mail to: *bibliometria@lib.uni.lodz.pl*.

<div align="center">*</div>

When preparing a scientific publication, it is worth remembering that it should be „findable" – for people, but first of all, for machines that act as an intermediary in the entire process. *Academic Search Engine Optimization* (ASEO - associations with SEO are perfectly correct) provides us with a set of guidelines that help to optimize work for the results of scientific search engines:

- giving appropriate titles – it is worth ensuring that the title contains the key term for us, because these are the titles that are indexed highest;
- correct editing of abstracts (we write about this further in the guide);
- matching keywords – they should appear in the title, in the abstract and in the text, it is worth remembering about the synonyms;
- footnotes and bibliography should be made in accordance with the universal guidelines, you can use bibliography managers (we also write about them later);
- file size (usually PDF) should not exceed 5MB – a smaller size of a file improves indexing;
- the file metadata should be completed accurately, specifying the author and title, and specifying subject matter and content;

- the publication file should be carefully named – it is best to include the author's name in its name, title and the year of publication, without diacritics and spaces;
- the text format of the file should be preserved – search engines must be able to perform content search;
- disseminating information – it is worth devoting time to self-promotion in the media and social networks.

3.2. Bibliometric indicators – face them

The appearance of bibliometric indicators in the academic discourse is still a threat to the scientific community. How to quantify the value of a scientific article? Is a publication cited ten times valuable, or maybe the one with hundred citations, or only the one with five hundred citations? And if a work is cited in a negative way – polemically, critically? The „measurability" of science and scientists arouses a lot of controversy, but regardless of our attitude, we should be aware of the existence of such indicators and their relevance for researchers.

Impact Factor (IF)

Journal Impact Factor, i.e., the impact factor, is a scientific journal rating index, which is the most recognizable in the international scientific community. Its determination is done by the owner of the Web of Science databases (formerly Thomson Reuters corporation, today Clarivate Analytics). This indicator shows the frequency of citing publications from a given journal throughout a year. The results are presented by the Journal Citation Reports – citation of journals ranking run by Clarivate Analytics on the Web of Science platform.

The IF index is calculated by dividing the number of article citations from the previous two years by the total number of articles in a given journal from these two years. Assuming that a journal published 40 articles in 2018, and 55 in 2019, and in 2020 these articles were cited 112 times, the journal's impact factor in 2020 will amount to 112 divided by 95, which is ~ 1.1789. The value which was obtained this way is valid for a given journal until publication of a new every year report that is published in the middle of each year.

Relying on the impact factor when evaluating scientific journals creates doubts primarily due to the differences between the disciplines also apparent in scientific periodicals and in the method and frequency of quoting articles. Texts in the field of medical sciences are much more often cited than those in technology, and publications in the field of humanities are cited even more rarely, which does not mean a lower quality of publications, but only their influence.

CiteScore (Scopus)

CiteScore is a bibliometric indicator for presentation of citation rates of journals and other periodicals. It is connected with the Scopus database belonging to the Elsevier publishing group and it has been calculated since 2016. However, in 2019 there was a major change in its methodology – instead of three years, four years are taken into consideration. CiteScore for a given year can be calculated by dividing the number of citations from the last four years (including the year for which the indicator is calculated) by the number of these publications. The calculation result is published every year, usually in the middle of the following year. In the meantime, we can track citation rates thanks to the CiteScore Tracker indicator. A journal's citation rates measured with CiteScore can be checked on the *Scopus database website*, on the list of journals indexed in the database.

This indicator should not be used to compare journals from different disciplines – it is not normalized, it neither takes into account the frequency of publishing nor the differences between disciplines in the average number of cited publications.

Hirsch Index (h-index)

The Hirsch index is a coefficient that determines the number of publications by a given author that scored at least h citations. The originator of this indicator is Jorge E. Hirsch, a physicist from the University of California – he announced his h-index in an article *An index to quantify an individual's scientific research output*, which was published in 2005. Today the Hirsch index is calculated by databases indexing scientific journals; you can determine it yourself, knowing the number of citations of a given author, but it is laborious. On his blog, Emanuel Kulczycki points six ways to check this indicator.

If an author's h-index is 10, it means that the author has 10 publications on his/her account cited at least 10 times. If it is 3, it means the author has 3 publications cited at least 3 times. So we take into account

the number of publications, but also their popularity (equated here with quality, which of course can be questioned). Calculation of the h-index turns out to be problematic even for humanists who are less visible in databases. One brilliant work, even if it resulted in the Nobel Prize for its author, is not enough to have a high h-index – there has been much debate about measuring achievements of scientists with this indicator.

Other indicators

Apart from the most famous bibliometric indicators in the scientific community[2] there are some other ones, most often related to specific databases. **Scimago Journal Rank (SJR)** determines the level of prestige of a given journal, taking into account the thematic relationship between the journal and a source citing it (Scopus). **Source Normalized Impact per Paper (SNIP)** allows to determine the citation rates of a journal in a specific area of knowledge, at the same time it is a standardized parameter, which makes it possible to compare journals from different fields (Scopus). **Index Copernicus Value (ICV)** is a Polish indicator that measures citation rates of journals and enables to predict an increase in citations for the coming years and the results can be checked in the ICI Journals Master List (Index Copernicus) ranking.

<div align="center">*</div>

In recent years, the visibility of scientific works has also begun to be perceived as their popularity in the sense of communication – the so-called *alternative bibliometric indicators (altmetrics)* no longer consider citing one scientific publication in another scientific publications, but „talking about publications."

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[2] Employees of the University of Lodz can read more about improving visibility in the Scopus and Web of Science databases in the guide posted in the Employee Knowledge Database.

3.3. Bibliography management – master the chaos

One of the most important postulates of all organisations working for science visibility and open access is the unification of the system of footnotes and the way of preparing a bibliography. It seems that the model of quoting taken from „Pamiętnik Literacki" has no chance of being effective in the digital world and researchers, if they want to be read by others – in Poland and abroad, should be able to adapt to the dominating methods.

The leading bibliographic styles such as *APA* (American Psychological Association), *MLA* (Modern Language Association of America) or *Chicago* (The Chicago Manual of Style), can be met in the requirements of the most important scientific journals and publishing houses; however, we know thousands of citation styles… To make researchers' work easier and enable quick adaptation of texts to these most significant styles, a whole range of tools has evolved that can be placed under a common name: bibliography management. Reference management software and citation management software have been created, which are more and more often combined in one tool.

We can find at least a dozen different managers on the web; however, it is worth knowing the most popular ones:

- *Mendeley* – a tool from the Elsevier publishing group, a free of charge bibliography management programme, as well as a social networking site for scientists and a data repository. In this manager you can store your publications and research data, compile attachment bibliography, comment on and share publications, set up groups, manage online and offline documents. Currently, a version for mobile devices is also available. Its most important functions are described in the article by Justyna Zawada but many tips can be found on Mendeley's website.
- *Zotero* – this manager lets you look for information on the web, organise research (create collections, tag them with keywords, save and group search results), adjust the citation system to as many as 9,000 different styles, collaborate with other researchers and create joint documents. It is free of charge software from the non-profit organisation Digital Scholarship. Relevant information for Polish Zotero users can be found on the website.
- *EndNote* – a paid tool for managing a bibliography (creating an attachment bibliography, collecting bibliographic information and full texts – bibliographic references can be entered manually or downloaded from databases). EndNote belongs to Clarivate Analytics, owner of the Web of Science

group, and in order to use it you need to be logged in – access for employees of the University of Lodz is possible via the website of the University of Lodz Library.

- *Citavi* – a bibliography manager that lets you search databases and library catalogues, save information (also this of websites as PDF files), comment and make notes to files, categorise, collaborate and of course – write scientific texts with selected citation styles and bibliography. Citavi Free is free of

A list of these and other bibliography managers can be found in Wikipedia, and they have been also compared by Emanuel Kulczycki; however, all of them operate on similar principles and give researchers specific benefits: creating and managing your own bibliographic dataset, downloading records from library catalogues and internet search engines, quick and easy adjustment to the citation style indicated by a publisher, avoiding errors and bibliographic inconsistencies, saving your settings and collaborating with other researchers.

3.4. Abstract – extract the essence

Many researchers mistakenly equate an abstract with a traditional summary of a text. It is worth remembering that these are not the same forms of content presentation – this is especially important today when scientific publications must be visible not only to a „live" reader, but also to databases indexing scientific journals or for search engines. Being already aware of the existence of ASEO, we recognize the need to adjust the metadata of each scientific article to the expectations of both people and machines.

Many editorial offices of journals or publishers clearly define their expectations –they require an abstract of certain length, prepared in accordance with the guidelines. However, if we do not have such editorial guidelines, we can use the standard rules for writing abstracts. One of the most common ones are obtained from the American Psychological Association (APA). Tips on how to prepare an abstract in line with the APA recommendations, have been included in a separate PDF file
available on the University of Lodz Library website and in the Employee Knowledge Database.

3.5. Scientist IDs – let yourself be recognised

The progressive internationalisation of science means that researchers need additional identification in the digital world – name, surname and affiliation are sometimes insufficient, especially that correct affiliation notations are not followed, and diacritics and non-Latin alphabets do not always work. You can have many such identifiers – numeric, in the form of links or codes – but recently ORCID ID has been recommended.

ORCID ID, or Open Researcher and Contributor ID, is a unique 16-digit identifier protecting a researcher's scientific identity. It enables to link many publications in one record, to indicate current and archival places of employment and organisations to which a given person belongs and to present the education path. It makes it possible to protect a scientist from doubts pertaining to the authorship of their works – change of surname, errors in the surname, various forms of writing (initials, second name). Such a digital CV can be used by a scientist themselves as a business card, but it is also used by publishers and editorial offices of journals. Many institutions, including the University of Lodz, require employed by it scientists to have an ORCID ID.

Number format: 0000-0000-0000-0000.
Registration and login page (free of charge): *https://orcid.org/signin.*

ORCID ID can be combined with other researcher IDs such as *Author ID* (an account identifier in the Scopus database) or *ResearcherID* (see Publons; account identifier in the Web of Science databases). For employees of the University of Lodz logged into the Employee Service the Scientist's Guide is available: *Scopus and Web of Science*, where you can see how to combine your IDs and aggregate publications. We can also combine our publications deposited in the Repository of the University of Lodz with ORCID.

Find out more...

- *Martínez A., Mammola S. (2021), Specialized terminology reduces the number of citations of scientific papers* [ENG]
- *Hirsch J.E. (2005), An index to quantify an individual's scientific research output* [ENG]
- *A Scientist's guide: Scopus and Web of Science databases [access for employees of the University of Lodz]* [PL] [ENG]
- *Zawada J. (2018), Efektywne zarządzanie bibliografią – poradnik użytkownika Mendeley [Effective bibliography management - Mendeley's guide]* [PL]
- *Useful tools and software - UŁ* [PL] [ENG]
- *Jöran Beel, Bela Gipp, Erik Eilde (2010), Academic Search Engine Optimization (aseo): optimising scholarly literature for google scholar & co.* [ENG]
- *Kulczycki E. (2013). Jak dodać prace do Google Scholar i zwiększyć liczbę cytowań oraz indeks Hirscha Poradnik dla początkujących [How to add papers to Google Scholar and increase citations as well Hirsch index A Guide for beginners]* [PL]
- *Kulczycki E., Zarządzanie bibliografią i cytowaniami [Bibliography and citations management]* [PL]
- *ORCID ID: Benefits for Researchers* [ENG]
- *Mikołajuk L. (2015), Repozytorium instytucjonalne jako istotny element promocji nauki [Institutional repository as an important element of science promotion]* [PL]
- *Górniewicz J. (2018), Ocena parametryczna jednostek naukowych w Polsce w roku 2017 w obszarze nauk humanistycznych i społecznych prowadzących badania naukowe i kształcenie akademickie w zakresie pedagogiki [Parametric evaluation of scientific units in Poland in 2017 in the field of humanities and social sciences conducting research and academic education with respect to pedagogy]* [PL]
- *Who's talking about your research?* [ENG]

4. Where is it worth publishing?

Publication of research results in the right place is a guarantee of safety – both if we mean the image of a scientist, as well as the assessment of an employee of a research unit or the security of our data as such. Not only publications are subject to evaluation, but also **scientific publishing houses and scientific journals**, i.e., two basic publishing possibilities.

Articles in peer-reviewed scientific journals are the most prestigious publication path with the highest value. However, it is worth taking into account the specificity of the discipline you deal with – in the case of the humanities and social sciences, scientific monographs published by reliable publishers are also highly valued. When choosing a place for your publication you should be guided primarily by the criterion of trust on the part of the scientific environment, as evidenced by, inter alia, presence on ministerial lists, indexing in databases and high citation rates. Publishing policy, clear publication ethics, review procedure, possibility of choosing the open access model are also important.

The Ministry of Education and Science (formerly the Ministry of Science and Higher Education) publishes the so-called scored journal lists, and recently also lists of scored publishing houses and conferences. Every researcher should be aware of their existence and changes taking place in them because they constitute the basis for the evaluation of scientific achievements in majority of the scientific units in Poland.

4.1. Scientific publishing houses

Majority of the leading research centres have their own publishing houses or collaborate with a specific publisher, and the publications of employees of a given research centre are most often published by that publisher – these can be monographs and scientific books, textbooks, dictionaries, encyclopaedias, scripts and periodicals, the most frequently reviewed scientific journals. Publishing houses may also be unrelated to any centre and combine publishing scientific materials, critical editions or popular science books with other activities. The most famous Polish publishing houses with scientific publications include, among others, PWN group, Ossolineum Publishing House, Scholar or C. H. Beck.

Many publishers use the hybrid model – some publications are published in open access format, some in a paid model and releasing publications after a year or another embargo period is a frequent practice. Before a researcher decides which publisher to entrust publication of their research results, they should

get acquainted not only with the costs of the entire project, but above all with the publishing policy. Most often it is available directly on a given publisher's website; however, there are places where we can easily check if a given publisher publishes in the open access model and whether it embargoes. A proven source of such knowledge is *Sherpa Romeo* – a service, where we can find most of the major scientific publishing houses and journals (mainly foreign, but also more and more Polish ones) with a description or reference to the publishing policy.

A developing Polish website presenting similar information is *Most Wiedzy*, which also provides us with the number of points (score) that a publication in a given publishing house or journal can bring us, according to the ministerial assessment.

4.1.1. Lodz University Press

Employees of the University of Lodz publish mainly in the Lodz University Press, which has been developing as a publisher since 1984 (it was established as the Publishing Department of the University of Lodz in 1972). Priority in publishing works of the UL employees is given to the Lodz University Press by the Rector's Regulation of 10/05/2018. Detailed information on the publishing policy, ethics and peer-review procedures can be found directly on the website of the Lodz University Press in the „For Authors" tab.

Lodz University Press publishes not only works from Lodz, but also books by researchers representing centres from all over Poland and the world. Publications are presented in over twenty well-known publishing series, such as „Judaica Łódzkie", „Jurysprudencja", „Perspektywy Biograficzne", „Projekt:Egzystencja i Literatura" or „Twórczość i Edukacja". Books and magazines also appear in open access.

4.2. Scientific monographs

A peer-reviewed scientific publication in the form of a book – this is how a scientific monograph is most often defined – is a recognized and prestigious form of presenting the results of scientific research. Although more is said about scientific articles, and a detailed plan for implementing the open access model in the world of science has been developed mainly for them, we can expect that scientific monographs will share the fate of journals and the interest in publishing them in open access format will increase.

What to pay attention to before submitting your monograph to a publisher?

- Has the publisher presented their publishing policy and what can we expect from the contract that we will sign?
- Will the monograph be available on the Internet free of charge? If the research results are to be presented in accordance with the funder's requirements, it may be an important element.
- Is the publishing house recognized by the Ministry of Education and Science? On the ministerial list from 2021 we will find publishing houses thanks to which the monograph can give us even up to 200 points. Majority of Polish publishing houses receive 80 points.
- Is the publisher trying to index their publications in databases?

Publication of a scientific monograph is primarily associated with the choice of a good publisher (if the publisher is not imposed on us by the employing unit). As we have written in the previous section devoted to scientific publications, a researcher should pay attention to the most important for them aspects of publication – do they want to publish in the open access model, with high ministerial scores or maybe they are mainly interested in the visibility of their publication? When choosing a publishing house, it is worth checking all these elements. We write in the further part of the guide how to avoid the so-called predatory publisher.

4.3. Scientific journals

Choosing a scientific journal to publish your research results is not easy and it is influenced by a number of factors. **What do scientists consider when choosing a journal?**

- **Funder's requirements** – if our publication is related to a grant, we have to choose such a journal that meets the requirements of a research funding agency. More and more often publication in the open access model is a requirement.
- **Employer's requirements** – in the evaluation of a researcher, primarily journals scoring high on ministerial lists are taken into account.
- **Prestige** – most frequently journals that are respected in the scientific community are also those highly scored, but sometimes we want to publish the results of our research in a periodical that we know is read by other scientists in our discipline and this argument prevails.
- **Visibility** – it is related to the journal's indexing in databases and a high rank in scientific search engines.

- **Security** – we publish in verified journals, e.g., on those from the white list of journals or on websites such as Sherpa Romeo or Most Wiedzy.
- **Opinion** – many researchers choose to publish in a journal recommended by someone or in a local one, e.g., cooperating with a given research centre.

There are all kinds of tools and databases to help you choose a journal. Most often these are: lists of journals, online guides and search engines. Using them will not only help you find a good journal that meets the funder's specific requirements, but also avoid publishing with an unverified publisher –we write later about the so-called predatory publishers.

- *DOAJ* – The Directory of Open Access Journals – an independent international database with over 15,000 journals publishing in the open access model. Journals on the DOAJ list undergo verification, and the list itself may be the basis for the selection of a periodical, among others, in the competitions of the National Science Centre.
- *Sherpa Romeo* – an international database that collects and presents publishing policies of journals and publishers in terms of open access. Journals are verified, before they go to the Sherpa Romeo database, and the content is constantly supplemented with the rules of publication in the open access model, self-archiving options and information on copyright.
- *Most Wiedzy* – Polish database that since 2021 has been developing towards collecting comprehensive information on publishers and journals: publishing policy, rules of publications in the open access model, scores from the ministerial list. The data is obtained on the basis of journal websites, but the team of Most Wiedzy verifies journal profiles by contacting individual editorial offices and publishers. Here we can check the policy of journals that are not yet available in Sherpa Romeo.
- *Journal Checker Tool* – a tool for testing journal policy compliance with the requirements of the open access policy set out in „Plan S". By providing the ISSN of a journal, the name of the research funding agency and the name of the institution, we can check whether the journal is appropriate for publication of our research results as part of a given grant. More information about JCT can be found on the cOAllition S website.
- *Arianta* – a website indexing Polish scientific and trade electronic journals, containing over 4,000 titles. You can search for journals by title or by category: alphabetically, by domain or by ministerial discipline.

Apart from these databases, there are many others, also specialised, such as *FreeMedicalJournals*, *ABC-Chemistry* or *BioMed Central*. Journals can be also searched through databases indexing texts. The largest ones are: *Scopus* and *Web of Science Core Collection*, which we wrote about in the part devoted to scientific search engines. Taking advantage of all these bases and tools, remember to pay attention to whether they are independent databases or related to a specific publisher or institution, as well as whether they take into account the open access model, if we want to publish in open access – some of them are commercial tools and journals are published in a subscription or hybrid model.

4.3.1. Scientific journals – University of Lodz

Several dozen scientific journals from various disciplines are related to the University of Lodz, of which over 40 are on the ministerial list of scored journals. We can find majority of them on the *Open Journal Systems* platform managed by the Lodz University Press. Many periodicals can be found in the *Scientific journals collection in the Repository of the University of Lodz*, where archival and current issues of open access journals are deposited.

4.3.2. Open publishing programmes – the University of Lodz

The pursuit of an open-ended publication model results in simple and free of charge access to scientific books or articles. However, it does not eliminate the costs that a publisher has to bear. In most magazines owned by large publishing houses or publishing groups, such as Springer or Elsevier, a fee for processing an article by the editorial office (Article Processing Charge) in the open model must be passed on to an author, since the publisher does not make money from selling access to the text. These costs can be really high, they can even exceed 1000 dollars/euro.

A way for national research institutions to deal with fees, which are too high for researchers, is to form consortia and conclude contracts with popular publishers – thanks to such publication license contracts, thanks to receiving a discount from the publisher, the institution covers the costs of publishing a certain pool of texts. By contrast, the use of such licenses allows authors to avoid fees or pay a lot less. How does it work? Researchers using affiliation of the University of Lodz, thanks to the contracts signed by the university, can use several programmes for open publishing and publish a number of articles in the open access model without the APC costs.

These programs are constantly updated, as are the requirements of funders. Therefore, potential authors have to be aware of the need to check:

- whether the selected journal meets the requirements of the funder;
- whether the selected journal is on the list of journals covered by the programme;
- whether a given programme is active at the moment;
- whether the pool of texts purchased by the consortium has not been exhausted.

Updated information on the open publishing programmes that the University of Lodz has joined can always be found on the website of the University of Lodz Library. Wirtualna Biblioteka Nauki is a great source of information – it publishes the latest information on activity/suspension of each programme. You can also check there whether a given journal is on the list or browse the list of journals of a given publisher.

Most often, the publication path under an open publishing programme looks like this:

- an author makes sure that the selected journal meets the conditions and is included in the active open publishing programme, and that the University of Lodz is on the list of beneficiaries;
- an author fills in an application form for a specific journal – most often already at this stage, it is possible to indicate that we want to take advantage of a discount or exemption from the fee as part of the programme, or the system itself catches this possibility thanks to the author's affiliation;
- further verification process follows, in line with the procedures adopted in a given editorial office.

If it turns out that the limit of free of charge publications (programme A) for a given year has already been exhausted, sometimes it is possible to use a reduced pool (programme B). In the case of open publishing programmes, the principle of „first come, first served" applies, and not within one institution, but the entire consortium – there is no pool of articles assigned only to researchers from the University of Lodz, the pool includes all researchers from the consortium. Therefore, we do not have the possibility of checking in advance how many places we have left with a given publisher.

In 2021, the University of Lodz has concluded contracts under several programmes for open publishing. The most popular programmes are: Springer 2019–2021, Elsevier 2019–2021, Emerald, Cambridge University Press (CUP), Science Advances 2019–2021 or Oxford University Press (OUP). It is always worth checking the validity of data on the WBN website, while contact with us is possible via the following e-mail:
 openaccess@lib.uni.lodz.pl.

4.4. Attention! Predatory publishers

Why is it important to verify a publisher or journal? Many scientists whose publications fell victim to the so-called predatory publishers have found out about it. This name has been adopted as a collective term for those publishers that use unfair practices towards authors and their texts, usually dictated by the will to get profits quickly and not completely legally. The most frequent fraudulent publication fees concern journals that publish in the open access model, but not only. Publishers committing such offenses as releasing to the market articles which have not been submitted for a review or which have been rated negatively or that fail to be scientifically valid can happen in any publishing model, and you have to be careful to avoid their traps. The name predatory publishers has been disseminated by Jeffrey Beall from the University of Colorado Denver, a scientist and librarian who focused his research on publishing and related matters. He is the author of a popular blog and the creator of the so-called *Beall's list* and a *Beall's list of predatory journals* – the lists available on the blog include these publishers, which we should avoid or give serious consideration to before starting collaborating with them.

How to avoid a predatory publisher?

- **Professionalism** – visit the website of a given publisher or journal and take a closer look at it. The site should contain basic information about the publisher: full address, contact to editors (e-mail addresses from public domains should arouse our vigilance), description of publishing policy, description of ethics rules, description of peer-review procedures, editorial guidelines or a guide for authors. Let's see if there are no typos or grammar errors in the texts.
- **Credibility** – let›s check if a given journal is actually indexed in journal databases that are listed by the publisher.
- **Procedures** – be sure to pay attention to the information about procedures pertaining to accepting texts and reviewing. No such information or a declaration that review procedures are «simplified» should make us think twice. It›s worth checking if a given journal publishes lists of reviewers, and if so, whether they include real, existing people.
- **Impact Factor** – information about the IF factor may be helpful in assessing the journal, but we have to be careful about coefficients with similar names such as General Impact Factor or Real-Time Impact Factor. No Impact Factor other than the one published by Clarivate Analytics is taken into account in bibliometric analyses in Poland and will not be useful. Access to the appropriate list is possible via the Web of Science database (free of charge for employees of the University of Lodz from the University of Lodz Library website).

4.5.   What about portals for scientists and repositories?

Voices in the scientific community opting for taking into account alternative bibliometric indicators, i.e., visibility of publications on the Internet, e.g., mentions on Twitter, in portals for scientists or other social networks are more and more frequent. However, it's worth remembering that while it is a way of both disseminating and popularising science, „posting" an article on the ACADEMIA website or in Mendeley will not replace its publication – it could be its complementation, a form of self-archiving.

Neither research portals, social media nor repositories are publishers, and publishing a text in their resources is only a form of archiving the text: it protects it, it gives it visibility and even citation rates, but if it is the only form of publication, we cannot expect it to be treated as a peer-reviewed scientific publication. Perhaps soon alternative bibliometric indicators will be taken into account in the evaluation of scientific achievements; however, it is best to treat portals as places to deposit texts that have already been published in the open access model or „opening" paid texts after the embargo period. More on the subject of archiving is described further in the guide.

Find out more…

- *Programy publikowania otwartego na UŁ [Open publishing programmes at the University of Lodz]* [PL]
- *Wirtualna Biblioteka Nauki [Virtual Science Library]* [PL]
- *Elsevier – open publishing in Poland* [ENG]
- *Presentation: Pilotażowy program publikowania otwartego Elsevier [Pilot Elsevier Open Publishing Programme]* [PL]
- *Springer - open publishing in Poland* [ENG]
- *Kulczycki, E., Korytkowski, P. (2020). Analiza gotowości polskich czasopism na Plan S [Analysis of the readiness of Polish magazines for Plan S] DOI: 10.6084/m9.figshare.12005475* [PL]
- *Beall's list of predatory magazines* [ENG]
- *Czym jest artykuł i monografia naukowa? [What is a scientific article and monograph?]* [PL]
- *Transformative Journals: Frequently Asked Questions* [ENG]
- *Wykazy materiałów przydatnych do pracy związanej z ewaluacją działalności naukowej [Lists of materials useful for work related to the evaluation of scientific activity]* [PL]

5. Where to deposit texts?

The difference between publishing and depositing/archiving is very important. A researcher must keep in mind that although self-archiving has many benefits and is sometimes even mandatory (as in the case of doctoral dissertations at the University of Lodz), it is not a substitute for publishing in peer-reviewed journals and scientific publishing houses.

The benefits of archiving texts in safe places on the web mostly overlap with the benefits of open access publishing. Green road, that is archiving an already published text in a repository can even replace the paid Gold Open Access if the publisher agrees and does not embargo it. In turn, placing the article in the Researcher Portal can help make new contacts and make a positive difference on the citation of our works.

Knowing the advantages of self-archiving and deciding to take such a step, we should know which place is worth choosing.

5.1. Repositories

Researchers most often choose between open-access/domain-specific repositories and an institutional repository managed by their own research centre.

Institutional repositories tend to focus on depositing the content the authors of which are employees of a given unit or those related to the unit itself, e.g., with a publisher or a project implemented as part of the operation of this unit. It's worth checking if our unit has such a repository because it is usually a place that meets requirements of research funding agencies, programmes, such as NCN grants or Horizon 2020, as well as publishers, and at the same time we can count on direct contact with persons who are responsible for validating data in the database and quick help. Institutional repositories provide extensive indexing, archiving, also long-term, and most importantly – persistent ID for our documents. Moreover, they represent a non-commercial model, so we have a guarantee of free service.

Public repositories tend to be more widely indexed than the institutional ones, therefore, they are also worth taking into account. One of these multi-domain repositories is the *Repository of Centre for Open Science* managed by the Interdisciplinary Centre for Mathematical and Computational Modelling UW. We most often deal with domain repositories. Such a type of Polish repositories, which are worth mentioning, are: *Lectorium* (historical sciences) or *ECNIS* (medical sciences) are. Databases and tools such as *OpenAIRE*, *OpenDOAR* or the *ROAR list*, i.e. Registry of Open Access Repositories are used for searching and comparing various repositories.

5.1.1. Repository of the University of Lodz

Employees, doctoral students and students of the University of Lodz have possibility of depositing their publications and research data in the *Repository of the University of Lodz* (RUL).

- The document is given a permanent digital file identifier – handle – which is free of charge for authors (costs are borne by the University of Lodz Library).
- RUL makes it possible for us to download statistics on deposited documents – we can check how many people and from what parts of the world have opened our publication.
- Metadata is available via OAI-PMH protocol and its description preserves the Dublin Core standard.
- Long-term archiving is possible.
- RUL cares about data security – backups are performed regularly.
- The repository is integrated with Sherpa Romeo (publishing policy), an author can choose a CC license and get an ORCID number assigned.
- RUL plays the role of the so-called small data repository – for technical reasons we have to consider size of the files.
- Data is indexed in such places as: *OpenAIRE*, *OpenDOAR*, *CORE*, *DART-Europe E-theses Portal*, Google Scholar.

Please contact us by e-mail: *repozytorium@lib.uni.lodz.pl*

5.2. Scientific portals and social media

The role of research portals and social media in disseminating science is constantly growing. While participation of such websites as Twitter, Facebook or Instagram in the popularisation of scientific knowledge is obvious, also more and more often they function as communicators and information boards for the scientific community.

Among **social media, Twitter** turns out to be the most popular among scientists – information about research results posted there, e.g., in the form of a link to a publication in the open access model, which anyone can read for free on the Internet, is disseminated at a tremendous pace, making Twitter a great data dissemination tool. Creating an entry, the so-called tweet or a tweet with information about our publication or scientific discovery takes a moment, the entry is short (no more than 280 characters, previously no more than 140) and easy to pass on. **Facebook** works similarly, it additionally enables creation of groups for the exchange of information and allows for longer entries.

Many researchers decide – quite rightly – to create an account on a science portal. The most popular portals for scientists are ACADEMIA, ResearchGate and Impactstory.

These types of websites perfectly support us in promoting scientific achievements, but similarly to social media they do not act as a repository and do not meet the research funding agency's requirements pertaining to sharing research results. Having an account on such a portal allows for presentation of our publications and for quick communication with other researchers, and for observing profiles of other scientists, thanks to which we learn faster about scientific discoveries of others, and others about ours. It is worth remembering that portals of this type are most commonly fully paid or have paid functions, so the decision to have an account there is your kind of investment in the image of a scientist and must be voluntary.

Alternative bibliometric indicators (called altmetrics) constitute additional motivation for researchers who care about the order and visibility of their publication achievements – many institutions are starting to take into account not only the citation rate of some scientific texts by other scientific texts, but also various types of references to the scientific texts on the Internet, in places such as social networking sites or portals for scientists. These „non-traditional" indicators use public APIs for calculations and show who, where and how much talks about our research. Thanks to altmetrics, we can find out how often a given publication was viewed (file views), discussed (on blogs, websites on the web, Wikipedia …), saved (e.g.,

added to „favourites" by network users), quoted (not only in scientific texts!) or recommended (even in the rankings). There is an ongoing debate in the research community pertaining to considering the study of social impact of science in the evaluation of scientific achievements.

It is worth considering placing your publications in the media and portals, as well as on authors websites or blogs as a parallel path for depositing documents in a repository. These paths are not mutually exclusive, but even complementary – in the Repository of the University of Lodz, you can already see how many times a given publication has been mentioned on Facebook or Twitter.

Find out more...

- *Repository of the University of Lodz* [PL] [ENG]
- *Platforma Polskich Publikacji Naukowych [Platform of Polish Scientific Publications]* [PL]
- *What are Altmerics?* [ENG]
- *Waleszko M. (2016), Opracowywanie standardów dla nowych form oceny społecznego oddziaływania publikacji naukowych: NISO Altmetrics Initiative [Developing Standards for New Forms of Social Assessment of impact of scientific publications: NISO Altmetrics Initiative]* [PL]
- *Kowalska-Chrzanowska M., Krysiński P., Rola serwisów internetowych jako narzędzi oceny dorobku naukowego. [The role of websites as scientific achievements evaluation tools] Przykład wykorzystania serwisów Google Scholar, ResearchGate i Academia.edu przez wybranych polskich reprezentantów nauk o komunikacji społecznej i mediach [An example of the use of Google Scholar, ResearchGate and Academia. edu services by selected Polish representatives of communication and media studies]* [PL]
- *Polskie repozytoria otwarte publikacji – wykaz [Polish open publication repositories – a list]* [PL]
- *Disciplinary repositories* [ENG]

6. What are our publishing rights and to whom do we give them away?

Open publishing often does not inspire trust of researchers because of their doubts about the copyright. On the one hand, we do not want to waive rights to our own texts and we are afraid we lose them with the moment of „release" of a publication on the Internet, and on the other hand, we do not want to breach our contract with the publisher if we have already published the text and want to make it available. Does the open access model really expose us to the loss of rights? Or maybe it helps to keep them?

In most cases, the open publication model enables authors of publications to preserve economic copyrights: the right to dispose the work and the right to receive a gratification for making the work available, while in the traditional model (commercial, subscription) publishing agreement contains a point on the transfer of these rights to a publisher. It is worth finding out more about the possibilities offered by open access.

6.1. Legal models of open access

Open Access is based on two legal models distinguished according to the permissions they grant to the recipients of the content. These are:

- **free open access** – i.e., free access to scientific content on the Internet, which we can read and use, but for personal purposes;
- **libre open access** – i.e., free access to scientific content on the Internet, which we can reuse under licenses that are wider than the law of fair use.

You can read more about the two models in the open publications by specialists in the field – Krzysztof Siewicz and Ewa Majdecka and Katarzyna Strycharz.

Open access publishing does not mean an author is waiving his/her copyrights! It means that it allows the access and use of the content based on the appropriately indicated licenses, e.g., free Creative Commons licenses. Misconception about the waiver of rights in the open access model results from identifying it with the public domain.

In February 2021 the STM group of academic publishers issued a *statement* on the strategy of preserving rights in connection with the implementation of the open access model in the world of science. *Members of cOAllion S* have also spoken on this issue. Debate on the rights in the open access model is going on at the highest levels, but the researchers themselves should not feel threatened – having basic knowledge on the open access model and available licenses, you can share your publications with no worries.

6.2. CC licenses

Creative Commons (CC) licenses are the most often used ones in the reservation (or release) of shared publishing rights as part of the opening of science. Legal licenses that reserve rights partially instead of fully, while not exempting from the obligation to respect copyright constitute their primary tool. On the Creative Commons Polska website we read:

"When using a license, the author always retains the copyright, at the same time allows others to copy and distribute, and he/she can additionally specify whether or not their use may only take place under non-commercial conditions or limit the possibility of creating derivative works"

A researcher must first decide whether they agree to the commercial use of the publication and whether they agree to create derivative works based on it (and if so, whether on the same license as the original). We do not have to be afraid that along with granting the license, the right to quote ceases to apply - CC licenses do not violate the freedom resulting from the copyright. Each copy of our publication must have correct information about the author and the license.

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The graphics denoting the basic terms of the CC license are certainly known to everyone:

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Non-commercial Use „Copying, distributing, portraying and performing a copyright covered work and creating derivative works based on it is allowed only for non-commercial purposes".

Under the same conditions „You may distribute derivative works only under a license identical to the one on which the original work was made available ".

No derivative works „You are allowed to copy, distribute, present and perform a work only in its original form – creating derivative works is not allowed ."

All Creative Commons licenses are free of charge and they are all based on authorship attribution – of these four basic conditions, six license combinations have been created, with varying degrees of openness. Authorship attribution only ceases when we want to put our work in the public domain, which is not recommended for research data – we care about visibility and citation rates, so we want to follow the further fate of our research, we are also often bound by contracts that do not allow the waiver of data rights.

The graphic below is a symbol of the Public Domain Mark 1.0.

Source: Creative Commons Polska CC 4.0

There is no waiver of moral rights in Polish legislation; however in other countries it is sometimes possible. Its counterpart among CC licenses is the Creative Commons Zero (CC0) license, the indication of which means the author's waiver of the copyright, property rights and transfer of the work to the public domain. Then, taking advantage of such a work, we do not need to inform about the source.

On the Creative Commons Poland website you can find detailed license descriptions, both in the form of the full text of the license and in a simplified version. It's worth reading at least descriptions of all CC licenses, as we come across them often – they are even used by repositories. In addition to the most popular CC licenses, we can also come across others, such as *GNU General Public License* (used as free software licenses) or *MIT licenses*.

*

It should be remembered that in the case of scientific publications that have appeared in any journal or published by any publisher, we need to read the publishing policy and check if we can make such a publication available on the Internet, or ask the publisher for a consent. Where to find such information and how to check if we can include our work in a repository or on a website?

6.3. Where can I find information on the copyright?

If a researcher has published an article in a journal or issued a monograph and wants to publish their work in a repository or „post" it on their website or in the research portal, they should make sure that it is allowed by the policy of the publisher with whom they signed the contract. Most often such information can be found directly on the publisher's website or – in the case of scientific journals – on the website of

a given journal. In such a document, the publisher determines whether they allow sharing publications in the open model, and if so, on what terms. In many cases we can come across the principle of allowing the opening of a given work after a certain period of time from its publishing, most frequently after 6 month or a year. We need to pay attention to that – some funders do not accept publications only after the expiry of the time embargo.

The openness policy of a given journal or publisher can be checked many times on the already mentioned Sherpa Romeo website. Journals registered in it are verified and have profiles created – the most important of the information posted there concerns the rules governing the rights of authors and recipients of content to reuse it, including publication outside the journal. Sherpa Romeo is a prestigious international database that contains tens of thousands of journals and publishers, including Polish ones. Among the journals related to the University of Lodz, the database includes, among others the journal Acta Universitatis Lodziensis. Folia Historica" the profile of which is easy to find. In the information on publishing policy, if only specified by a publisher/editorial office, we can check, for example, whether the journal is published in the open access model, if it allows publication of works outside its pages, if it allows authors to use different versions of texts (preprints and postprints) freely or if it imposes an embargo. The Polish equivalent of this database is the rapidly developing Most Wiedzy.

Apart from the databases defining publishing policy in terms of publishing in the open access model there are also those that collect information on review procedures and preprints. *Transpose service* is one of such databases – apart from information about *journals*, we can also find there a useful glossary of terms related to editorial procedures.

Remember that the publisher is always the best source of information – it's worth making contact with the publisher, e.g., through the editorial office of the journal, and directly ask for a consent to make an article or book available in the institutional repository, on the author's website or in the portal.

Find out more...

- *Sherpa Romeo journals search engine – check license* [ENG]
- *Wyszukiwarka czasopism Most Wiedzy – sprawdź licencję [Most Wiedzy journals search engine – check the license]* [PL] [ENG]
- *E. Majdecka, K. Strycharz (2018), Otwarta nauka: prawo autorskie i wolne licencje [Open science: copyright and free licenses]* [PL]
- *K. Siewicz (2012), Otwarty dostęp do publikacji naukowych: kwestie prawne [Open access to scientific publications: legal issues]* [PL]
- *STM: Signatories publish statement on Rights Retention Strategy* [ENG]
- *cOAlition S response to the STM statement: the Rights Retention Strategy restores long-standing academic freedoms* [ENG]
- *Poznaj licencje Creative Commons [Get to know Creative Commons licenses]* [PL]
- *Open Data Commons licenses* [ENG]
- *Regulamin ochrony własności intelektualnej na UŁ [Rules on the protection of intellectual property at the University of Lodz]* [PL]
- *Przewodnik po prawie autorskim – Legalna Kultura [Copyright guide – Legal Culture]* [PL]
- *Domena publiczna – Koalicja Otwartej Edukacji [Public domain – Open Education Coalition]* [PL]

7. Useful links and contact

Pages related to the subject of open publishing:

- *cOAlition S* [ENG]
- *Digital Centre* [PL] [ENG]
- *Creative Commons Polska* [PL]
- *Dublin Core Metadata Initiative* [ENG]
- *FAIR Principles* [ENG]
- *Coalition for Open Education* [PL] [ENG]
- *Most Wiedzy* [PL] [ENG]
- *OpenAIRE* [ENG]
- *Open Data Commons* [ENG]
- *OtwartaNauka.pl* [PL]
- *Platforma Otwartej Nauki* [PL]
- *Platforma Polskich Publikacji Naukowych [Platform of Polish Scientific Publications]* [PL]
- *Sherpa Romeo* [ENG]
- *Office for Personal Data Protection* [PL] [ENG]
- *Uwolnij Naukę* [PL]
- *Wirtualna Biblioteka Nauki [Virtual Science Library]* [PL]
- *Kurs Open Access – Otwarta Nauka – AGH* [PL]

Contact us!

We conduct trainings, among others, in the field of open publishing programmes, open science, Creative Commons licenses and operating the Repository of the University of Lodz.

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