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Open Access in Poland:

Interview with Bożena Bednarek-Michalska

Bożena Bednarek-Michalska is an information specialist and deputy director at the [Nicolaus Copernicus University Library in Torun](#), Poland. She is also a member of Poland's Open Education Coalition ([KOED](#)), a board member of [SPARC Europe](#), and a former [EIFL country coordinator](#). Below she talks about OA in Poland.

TEXT TO ADD: What seems striking about the situation in Poland:

1. Access is not viewed as a serious problem in Poland today. That OA has made as much progress as it has in the country seems to be due to a combination of things: a fear that it will become unaffordable in the future, the failure of commercial publishers to provide research material from many transition and developing countries, a sense of inequity (i.e. the knowledge that countries who cannot afford access to research are at a disadvantage), and the growing influence that OA initiatives in Western Europe and the US are beginning to have.

2. In Poland journals are not expected to make a profit and so APC costs are not considered essential; this has seen developments like the “publisher-pays” model that has been introduced by Springer-owned Versita.

3. In Poland the OA cause is more tightly bound up with the issue of openness to other types of material than in other countries, including open educational resources, information and data generated by a plethora of publicly-owned organisations and agencies, and even publicly-funded cultural products. This is exemplified in the proposed “Act on Open Public Resources”, which would encompass scientific, educational and cultural resources (where publicly funded).



Bożena Bednarek-Michalska

RP: *Can you give me a sense of how large the Polish research budget is, how Poland's spending on research compares with other countries, and what proportion of the papers published globally each year are produced by Polish researchers. (For purposes of comparison I understand that the UK produces [around 6% of the world's research papers](#), and currently spends £4.6 billion a year on publicly-funded research)?*

B B-M: Some of the answer to this question can be found by referring to the [Scimago service](#). This shows that between 1996 and 2011 Poland published 304,003 documents. This is 1.24% of the world's research papers (in the UK it is 6.23%). Using Scimago, Poland's research output can be compared with other countries. And more detailed information about science in Poland can be viewed [here](#).

As concerns, science funding, in 2011 Poland spent 6.3 billion PLN (Polish złoty), which is €1.5 billion (£1.3 billion). The Polish government plans to spend a little more on research each year.

RP: *Can you say how many peer-reviewed journals are published in Poland, and to what extent researchers tend to publish in international journals rather than local Polish journals?*

B B-M: We publish around 2,200 scientific peer-reviewed journals a year in Poland, some in English journals, but most in Polish ones. In Poland, as a general rule, scientists prefer to publish in international journals, while humanists prefer to publish in Polish journals.

RP: *To what extent is access to research a problem in Poland today?*

B B-M: In terms of access to knowledge resources, I would say that it is not bad at the moment in Poland. This is mainly because the [Polish Ministry of Science](#) buys a government package, which costs about 160 million PLN and provides all Polish universities with access to some paid-for databases.

RP: *Is this a national licensing (or [Big Deal](#)) arrangement?*

B B-M: It is a combination. The Polish Ministry of Science funds access to the content of major scientific publishers for all academic and non-commercial research institutions in Poland. The national license agreements with Springer, Elsevier, Wiley, Thomson, as well as the publishers of *Science* and *Nature* journals are coordinated by ICM University of Warsaw, which also hosts the perpetual local archive of the licensed content for Poland. Access to other publishers' resources is organised by academic consortia with partial funding provided by the Ministry. Consortia licences only provide access to those institutions that are willing to pay for access. Not all will want to or be able to.

Individual academic libraries also buy access to some other databases for their researchers, although they do not buy many as they are expensive. In addition, scientists themselves will use personal contacts to obtain papers. They also use open resources, which are actively promoted by libraries.

RP: *What would you say to someone who responded that if access to research is not bad in Poland today, why should researchers embrace OA?*

B B-M: Because the commercial packages that we buy do not everything that our researchers need. For instance, they have no Polish scientific material, and they do not include material from other countries whose research we need access to — e.g. research from Bulgaria and Russia. So we need to work together to build open resources, and we need as many of those as possible.

In addition, of course, it would be foolish to assume that Poland will always have the necessary funds to buy access to commercial databases of articles. And we need to take an unselfish view, and be mindful of the needs of those researchers who work in countries where research institutions cannot generally afford the increasingly expensive offerings of commercial publishers.

No national solutions

RP: *How would you characterise the current situation in Poland so far as Open Access is concerned?*

B B-M: The situation in Poland is pretty good so far as the promotion of open access is concerned. For instance, there are quite a few OA events, and currently we are in the process of creating a Polish OA calendar to catalogue them.

However, we have no national solutions today, either collective initiatives of Polish universities, or of research foundations. Likewise, no national solution has been put in place by the Polish [Ministry of Science and Higher Education](#).

In terms of concrete steps taken by individual colleges or foundations, if you were to rank Poland alongside other countries in Europe, we would probably be in the middle somewhere.

One positive development is that we are seeing the emergence of a growing number of activists and social groups. All in all, I anticipate that things will move forward slowly but persistently.

RP: Who are the main research funders in Poland, and have any of them put in place an OA policy?

B B-M: The largest funder is the [Ministry of Science and Higher Education](#), which has two agencies — [The National Centre for Research and Development](#) and [The National Science Centre](#). There are also a number of Polish foundations.

Some of them support OA, but none has an official OA policy today. We, I mean KOED, have had discussions with the presidents of these centres about Open Access. But while they are open to debate, they anticipate a lot of political and bureaucratic obstacles.

RP: ROARMAP lists [three OA mandates](#) in Poland, and OpenDOAR lists [75 repositories](#). I am not sure how up to date these data are, or how many research institutions there are in Poland, but assuming the figures are correct how satisfied are you with progress to date?

B B-M: Yes, there are 75 Polish repositories in DOAR. Many of them are digital libraries that also contain current scientific journals and materials. I should point out that the situation in Poland is specific. When we began building digital content in 2004, we used the Polish software [dLibra](#), which was not designed specifically for scientific information but for any digital object.

As a consequence, deposited documents were not initially differentiated in any way. We were not aware of dedicated repository software like Fedora and DSpace at the time, and we didn't understand how important it was for universities to have their own repositories.

Today we do differentiate, and we make a distinction between older documents that need to be digitized and documents that are born-digital. And we have started to build institutional repositories using DSpace.

Some examples of these repositories are [ECNIS](#) at the [Nofer Institute of Occupational Medicine](#), [AMUR](#), at [The Adam Mickiewicz University](#), [RUW](#) at [The University of Warsaw](#), [CEON](#), the Polish central repository, [RUMAK](#), at [The Nicolaus Copernicus University](#), [SUW](#), at [The Cracow University of Technology](#), [IBB PAS Repository](#) at [The Polish Academy of Sciences](#), [ENY](#), at [The Wrocław University of Technology](#), [ICM UW](#) at [Warsaw University's Interdisciplinary Centre for Mathematical and Computational Modelling](#), and [RUŁ](#) at [The University of Łódź](#).

I think it would be fair to say that at the moment the situation is very dynamic. The good news is that something changed within the Polish scientific community last year. Many researchers now understand that repositories can promote the research output of their university, and therefore of their own work. And they now see that this

can increase the number of citations that their papers get, and so the impact of their work. This is probably because they have now had sufficient experience of using the Internet to see the benefits of making their papers freely available.

But as I noted, there have been no progress with regard to OA policies and mandates. In Poland no one wants to force scientists to make their work openly available, so the focus is on voluntarism. Rather than work on developing a university policy it is felt better to let librarians develop and manage the institutional repository and allow faculty to get used to the idea of using it. Trying to do it the other way round does not work. Perhaps Poles need to be shown what is possible, and become acclimatised to new ways of distributing their research first?

Green or Gold?

RP: *Would you say that there is currently greater interest in [Gold OA](#) (OA journals) or [Green OA](#) (repositories) in Poland today?*

B B-M: I would say that Green OA is much more popular. It is easier to build institutional repositories in Poland, and new repositories are therefore being built, and will continue to be built in the near future.

In my opinion this is a realistic approach. We librarians are successfully convincing scientists that repositories are necessary, and we are doing so by arguing that most material is now born digital, and so must be archived somewhere.

For this reason, when I talk about repositories I do so mainly in the context of long-term archiving. For some reason scientists better understand an argument focused on the need to store research rather than on the need to disseminate it.

At the same time we are working with scientific institutions to transform traditional paper journals into electronic OA journals. The Polish Academy of Science is currently active in this area, for instance, as are some universities — e.g. my own institution, the [Nicolaus Copernicus University \(NCU\)](#).

Specifically, the NCU Press and Senate have decided to migrate NCU journals to the Open Journal Systems ([OJS](#)) software over the next 2 years.

We also have an [open digital library](#), an [open repository](#), and an [open educational platform](#). This is a very new collection of open resources. I hope it will provide a good model and example for other Polish institutions.

RP: *Do you mean that NCU Press plans to convert current subscription journals to OA journals? If so, how will they be funded — through article-processing fees or in some other way?*

B B-M: Polish scientific journals (which are generally produced by our universities) are not profitable, so all the printing costs are covered by the owner institution.

Since it is not possible to make money from the journals the open access model seems entirely logical, and this is increasingly the view taken in Poland. So it would seem that OA journals will continue to be funded by universities in the way they always have been.

RP: *Presumably some academic journals are published by commercial publishers?*

B B-M: Yes. And some examples are [Termedia](#), [ViaMedica](#) and [Versita](#). But Termedia and Via Medica have rich sponsors and so can provide open access to some of their titles or articles. Versita, which is own by Springer, also has [open access policy](#), but note that it will negotiate agreements with scientific institutions using what it calls its “[publisher-pays](#)” model.

RP: *And with the publisher-pays model the costs is met by the publisher rather than authors (or their funders). So who would you say is mainly driving the development of OA in Poland today: researchers, librarians, research funders, or the government?*

B B-M: In Poland, the majority of OA initiatives are undertaken by librarians. Librarians are also the most published on the subject.

That said, there are a number of research centres that have supported open access for a while now — e.g. ICM UW ([Warsaw University Interdisciplinary Centre for Mathematical and Computational Modelling](#)), the [Nicolaus Copernicus University in Toruń](#), the [AGH Cracov University of Science](#), and the [Polish Academy of Sciences](#).

We have also seen the emergence of an initiative of young researchers known as [The Citizens of Science](#). Open Access is one of the goals of this organisation.

What perhaps distinguishes Poland from other European countries is the existence of the Open Education Coalition ([KOED](#)). This brings together a number of organizations that are working towards opening up educational and science resources, and representatives of the coalition take part in all the important debates about openness in Poland.

I should add that the Polish government — specifically the Prime Minister, the Ministry of Science and High Education, and the [Ministry of Administration and Digitization](#) — has also begun to take an interest in this topic.

Conscious of the debate that took place in Europe in 2011, in 2012 the Ministry of Science and High Education commissioned a report on open science. This was edited by Marek Niezgódka, and published by ICM UW.

The report — called [Implementation and promotion of open access to scientific and educational content](#) — outlined a path that academic institutions could follow if they decided to implement the OA model.

RP: What recommendations did it make?

B B-M: The main recommendations were as follows:

1. The Open Access model should be included in the parametric evaluation of Polish scientific institutions;
2. Both the National Science Centre and the National Centre for Research and Development should mandate open access for the research they fund;
3. Scientific journals that are funded from the public purse should be open access;
4. The openness of a scientific journals should be taken into account when evaluating it;
5. All the publicly-funded programmes of the Ministry of Science should use an open access model for the scientific material they produce;
6. Doctoral theses and dissertations should be published under an open access model;
7. The Ministry should develop programs to ensure that Polish scientists working abroad embrace open access.

And in line with the international declarations and developed solutions for OA (including [libre OA and gratis OA](#)) it is proposed that intellectual property rights in papers should be regulated by means of Creative Commons licenses.

Here is an extract of the [Executive Summary](#) in English (Pages 10-23)

“Proposals stated above were put in order according to their importance. The most essential suggested changes concern the parametric evaluation of scholarly institutions and implementation of open mandate in Polish research funding agencies. These proposals are at the same time the most difficult to implement, but they are also able to make significant difference. On the other hand, modules concerning evaluation of scholarly journals and their budget funding should be the easiest to introduce. All of these changes should be complemented with additional actions: building OA recommendation on Ministry level, supporting scientist and institutions in embodying Open Access policy by legal, financial and infrastructural help, providing a training system.”

To date, however, no action has been taken to provide decisive and systemic support for Polish universities wishing to embrace open access and the only concrete measure the Polish Government has taken with regard to OA is to [fund the publication of articles](#) using [Springer Open Choice](#).

RP: Can you clarify what is meant by the first recommendation: “The Open Access model should be included in the parametric evaluation of Polish scientific institutions.”

B B-M: We have in Poland a system of evaluation that we call “Parametryzacja”. This involves a survey being completed on each research institution, and on the basis of that survey the Minister makes an assessment of an institution, and this assessment determines how much funding it gets.

Act on Open Public Resources

RP: What are the major OA initiatives in Poland right now, and what are their objectives?

B B-M: The most interesting initiative right now comes from the Ministry of Administration and Digitization — which has proposed an [“Act on Open Public Resources”](#). If this succeeds our job will be made much easier.

RP: What is the objective of the proposed Act?

B B-M: The aim is to ensure that as many materials as possible are published on the Internet, especially those resulting from public subsidies.

If nothing else, the proposal has sparked a debate in Poland about access to resources that have been funded with public money.

RP: This is much wider than open access I think. Can you say more about the scope of the proposed act, and what specifically is proposed?

B B-M: The proposed Act defines open public resources as scientific, educational and cultural resources that have been supported by public money. It is assumed that all of these should be open, but to different degrees (more or less open) and over different timescales (e.g. by means of embargos). I should stress that this would be limited to public institutions and to publicly-funded material.

But as I say, it has sparked a debate, and a debate that has become very heated. Since the Act would include cultural material there have been a lot of protests from those who work in the world of culture.

Both OA activists and activists working in the sphere of open educational resources (OER) therefore have their work cut out to try and convince the various communities that the Act is a good idea.

But as I said, we are seeing more and more advocates for open science, education and culture emerge, especially among younger scientists. Right now they are forming working groups in various organizations in support of greater openness. This is evident not only among citizens but also in government agencies and academic

institutions, as well in foundations like the [Foundation for Polish Science](#) and the [Polish Science Foundation](#).

RP: *As you will know, the Research Councils UK policy — which came into effect on April 1st — has been [very controversial](#), particularly its requirement that researchers “prefer” Gold OA over Green OA. Has this controversy influenced the debate in Poland at all?*

B B-M: No, there is no great discussion about this in Poland; we are not at that stage of the debate. We also do not have a large national research council like RCUK that is able to dictate to other institutions, and impose a model of OA on them. Consequently, any discussion of OA in Poland today is limited to the question of whether individual institutions should build an institutional repository or convert their journals to OA.

In time, I hope, more and more institutions will do so, and that they will copy what we are doing. If that were to happen then the ministry would have to take note.

For the moment I would note that the deal with Springer Open Choice suggests that the Minister prefers Gold OA. I assume, therefore, that the focus is on continuing to publish in traditional titles that have an [Impact Factor](#).

RP: *Of course, Green OA enables researchers to continue publishing in (subscription) journals with a high Impact Factor and then making them OA by self-archiving them. One might argue that this is a more effective way of providing OA (although perhaps after an embargo) whilst ensuring a high Impact Factor than paying for Gold OA through a deal with a single publisher like Springer.*

B B-M: Yes, you are right. I did raise this issue with [Minister Elzbieta Orłowska](#), the Secretary of State for the Ministry of Science and Higher Education. I suggested that we need to develop OA in Poland in two directions. But unfortunately she believes there is only one form of OA — Gold OA.

RP: *Another controversial aspect of the RCUK policy is its requirement that Gold OA papers be made available under a CC-BY licence. How would you describe the current discussion in Poland vis-à-vis research papers being made available under more liberal copyright licences? Or is this issue not much discussed?*

B B-M: CC licences are now well known in the Polish scientific community. We have been trying to promote their use for five years in our scientific society — by we I mean OA and CC activists.

To do this we have organised many lectures, meetings, debates, and workshops, and published a lot on the topic. This has seen even the largest newspaper in Poland — [Gazeta Wyborcza](#) — [drawn into the debate](#). But what we learn from this is that understanding of the issues remains very low.

That said, some digital libraries or repositories have started using CC — for example in my university. However, that is because I am based here and can explain what it means to our faculty. You can see an example of one of the CC-licensed documents in our repository ([RUM@K](#)) [here](#).

By the way, we in the Open Education Coalition recommend the use of CC BY-SA for scientific papers — although scientists frequently prefer CC BY-ND.

RP: To what extent is the EU policy (particularly with regard to [Horizon 2020](#)) influencing the debate on OA in Poland?

B B-M: The EU initiatives — both Horizon 2020 and the [Recommendations of 17th July 2012](#) — are very important for us because they have provided us with an opportunity to open further discussions with the Ministry of Science and Higher Education.

The Ministry knows that it is time to focus on the changes and it was for this reason that it commissioned the 2012 report on the implementation of OA in Poland. As I noted earlier, this was undertaken by the ICM UW, which is a member of the Open Education Coalition. It is very good document, and recommended, inter alia, the use of CC licenses.

I hope that the report will speed up decision making, but we will see. And I hope that the EU recommendations, combined with bottom-up initiatives, will deliver some good results in the near future.

Helped to focus minds

RP: And to what extent are developments in the US (including the [National Institutes of Health Public Access Policy](#), the proposed [FASTR](#) legislation and the recent [White House Memo](#) on OA) influencing the OA debate in Poland?

B B-M: As with the EU recommendations, this has helped to make researchers and physicians more aware of open access to science. Those who publish with PLOS now also understand the issues.

In fact, it was initiatives like this that helped to persuade the Minister of Administration and Digitalisation (MAiC) to prepare the draft law on open public resources. In other words, the international debate about providing broader access to content — and not just in the field of medical sciences — has helped to focus minds in Poland.

RP: You will doubtless be aware that a new organisation called the Global Research Council was established last year, and is [currently working on an action plan for Open Access](#). Is Poland involved in the GRC, and do you expect the new organisation's initiative to prove important for the development of OA?

B B-M: No, I have no information about any Polish involvement in this organisation. But thank you for drawing my attention to it.

RP: *What are your hopes and expectations for OA in Poland in 2013?*

B B-M: I hope that this year we will see more systemic action to support OA in Poland, and maybe ministries will develop some specific policies for it.

In the meantime, we will continue to organize training events and conferences, and take part in [Open Access Week](#). We will also respond to all official documents on the topic. Our objective is to continue to change the consciousness of Polish society about the need for open science.

RP: *Where do you think Poland should be putting its main energy today?*

B B-M: I believe that Poland should move quickly to implement the EU Recommendations, although it would have been nice if we had already implemented them.

The proposed [Bill on Open Public Resources](#) could be key. If it were adopted Poland could leapfrog many other countries in Europe, and take a leading position on OA. However, it will inevitably be a painful and lengthy process if we are to succeed.

RP: *Finally, do you have specific views on the debate about Open Data and Open Science, and the role of OA within the larger Open Science debate?*

B B-M: I believe the broader debate to be very important. I began to take an interest in this topic in 2011. Below are some of the lectures I prepared to explain both open science and open data.

- With [Caroline Grodecka](#) from Krakow I developed an [e-learning course](#) in which we explain these new terms.
- In 2012 we also organised with EIFL an [international conference](#) about Open Science.
- We also prepared a [special issue](#) of the EBIB Bulletin on open data (with [English abstracts](#)).
- See also our [issue](#) on Open Science and education (with [English abstracts](#)).

RP: *Thank you very much for taking time to answer my questions.*