



E-Publishing *Working Group Charta*

Coordinators: Laurence Benichou (MNHN Paris, FR) and Isabelle Gérard (RMCA Tervuren, BE)



01. PURPOSE AND VISION OF THE WORKING GROUP
02. STRATEGIC RELEVANCE TO CETAF
03. MAIN THEMES AND OBJECTIVES
04. WORK PLAN AND DELIVERABLES
05. EVALUATION AND SUCCESS METRICS
06. TIMELINE AND LIFETIME
07. ROLES AND RESPONSIBILITIES
08. GOVERNANCE AND DECISION-MAKING STRUCTURE
09. COMMUNICATION AND COLLABORATION TOOLS
10. STAKEHOLDER ENGAGEMENT
11. RESOURCE PLANNING – HUMAN, TECHNICAL, FINANCIAL

1. Purpose and Vision of the Working Group

E-Publishing WG was designed to:

- Network and share experiences between the participants: bring together people involved in publishing in our institutions to address isolation of publishing staff.
- Ensure a technological and legislation watch in terms of publishing innovation and the continuing development of the nomenclature's codes.
- Be a driving force in scientific publishing, particularly in taxonomy
- Empower institutional and learned societies journals (hosted by member institutions) so they can comply with their institution's OA and FAIR policy, or transform their economic model into a model that is both compliant and sustainable
- Promote taxonomic/biodiversity publications as
 - container of facts, links that, in order to be of immediate and high-quality use, have to be published in semantic formats and open access
 - part of open science whereby the publications and its published data is accessible as open FAIR data through repositories like the Biodiversity Literature Repository, and immediately re-used by GBIF, ChecklistBank, biodiversityPMC
 - semantic documents by providing the tools to create those upfront in the publishing process
- Assure that taxonomic publications are part of the research data life cycle and an integral part of digitization of collections and serve as provenance for each taxonomic identification
- Assure that taxonomic publications are in open public repositories in a format that is also machine actionable, e.g. to be part of AI applications beyond taxonomy themselves.
- Coordinate with taxonomic databases (IPNI, Zoobank, ChecklistBank, etc.) that these semantic annotations allow automated import into these databases.
- Assure that the taxonomic data is reused by Zoobank, ChecklistBank (taxonomic names) and GBIF (taxonomic names, taxonomic treatments, material citations, figures)
- Provide indicators to measure journals' taxonomic input (eg how many new species described) and impact (eg how many of the new species are in target DB, eg ChecklistBank, IPNI, etc.) that would be an information-rich way to reflect their activities in the field. Measures might be developed into indicators that can inform Kunming-Montreal Global Biodiversity Framework monitoring, e.g. Targets 20 and Target 21.

2. Strategic Relevance to CETAF

- Concrete and clear topics can attract more active members
- Demonstrated outputs (tools, dashboard, papers ...)

- Up -to- dateness via surveys and technological watch
- Successful communication of the nature of scientific/taxonomic publishing will lead to integrating them in the research data life cycle.
- Semantic publishing will raise the visibility of the research and digitization efforts of CETAF members
- Operational workflow publication - reuse of data in target databases (Nomenclature, GBIF, etc.)
- Link with CETAF EPAG to communicate needs and look for funding opportunities
- Expert knowledge about legal policies focused on copyright and at the forefront of developing data governance for linked data.

3. Strategic Relevance to CETAF

- Scientific publishing is part of the research cycle. Particularly in taxonomy where scientific validation is effective by publishing nomenclature acts
- Successful communication of the nature of scientific/taxonomic publishing will lead to integrating them in the research data life cycle.
- Semantic publishing will raise the visibility of the research and digitization efforts of CETAF members
- Encourage FAIR publishing complies with open science policy
- Operational workflow publication - reuse of data in target databases (Nomenclature, GBIF, etc.)
- Expert knowledge about legal policies focused on copyright and at the forefront of developing data governance for linked data.

The goals and achievements of the WG is fully aligned with the Core Values stated in the CETAF vision (copied below)

- Commitment to Biodiversity and Geodiversity: Support and promote the exploration, understanding, and preservation of biodiversity and geodiversity.
- Public Engagement: Foster meaningful interactions to promote awareness and conservation efforts.
- Openness: Ensure accessibility of information and resources.
- Collaboration: Emphasize teamwork to achieve common goals.
- Participation: Encourage inclusive involvement to drive positive change.
- Responsible Research and Innovation: Promote ethical and transparent scientific practices.
- Diversity and Equality: Value differences, ensuring fairness and respect for all.
- Symmetrical Knowledge Exchange: Enable equitable sharing of information and expertise.
- Transparency: Maintain openness and clarity in operations and communication.

4. Main Themes and Objectives

- Objectives
 - Promote taxonomic publications as containers of research results including citable statements and curated links specifically between specimen, taxonomic names, genes, digital objects and publications, and as provenance of the statements therein.
 - Publish opinion papers and best practices
 - Provide publishing expertise to CETAF (particularly when involve in European projects)
 - Liaise with relevant bodies to express, and resolve, issues related to publishing (nomenclature commissions, specific databases such as CoL, GBIF...) and in particular collaborate with:
 - GBIF, ChecklistBank, biodiversityPMC, Biodiversity Literature Repository (Zenodo), TreatmentBank or similar to enhance existing repositories and conversion workflows to provide services needed for the CETAF community
 - GBIF to create hosted portals for each journal
 - BiodiversityPMC to provide AI tools to annotate, mine biodiversity publications as an integral inter pares with the biomedical and life science literature at PMC
 - IPNI, Zoobank, etc. to automate registration of new taxonomic names
 - Scientists, libraries to use the TNA approach (Transnational Access in BiCICL) to liberate dedicated corpora of taxa, geographic regions etc. from legacy literature
 - Plazi
 - TDWG to collaborate on the development of standards and ontologies for semantic publishing, and agreement development on harmonized approaches and resources
 - BHL (Biodiversity Heritage Library) which improves research methodology by collaboratively making biodiversity literature openly available to the world as part of a global biodiversity community.
 - SPNHC (as part of the MoU between CETAF and SPNHC) eg. for developing best practices and governance strategies for open data, dissemination of information and knowledge, e.g. in the form of recommendations and guidelines, capacity development and training, science-policy advocacy, networking with partners outside of Europe
 - Actively engage and communicate with policy makers and influence publishing- and taxonomyrelated policies at different levels, nation, EU, UN

5. Work Plan and Deliverables

• 5.1. Key Tasks

- Identify the actions to be undertaken by the community in order to tackle CETAF Strategic Objectives in relation to publishing and monitor its achievement.
- Identify topics related to publishing that need our expertise or that need us to reach a consensus
- Organise or conduct (potentially joint) workshops on relevant topics and technical developments in e-publishing (possibility of inviting experts) or to expose the rationale and issue of the topic to the community
- Animate regular meetings online (every two weeks) open to all E-Publishing members to discuss the topic and write a paper on it
- Communication
 - A concerted communication effort has to be made in the CETAF and beyond to revive biodiversity publications as indispensable tools for research data, curated links between data, statements, and most importantly reference and entry point of data about taxonomic identifications.
 - Make use of new opportunities by having data in publication in an machine actionable way, for example in the form of reports or dashboards
 - The value of using standards in publishing for citation, making data citable.
 - Saving time by providing all the citations in a publications with respective persistent identifiers and including access to the cited digital objects, such as treatments or publications by creating them, if not available, as part of the research workflow, for example by uploading all the cited publications in an article to BLR and with this creating taxon/topic-based corpora in BLR or BHL (see eg drosophilid literature).
- Participate in European projects and provide publishing expertise on behalf of the CETAF community (such as BICIKL)
- Support, encourage and participate to collective initiative promoting FAIRness (such as Disentis Roadmap)
- Support the development of a large scale project to liberate data in publications to complement genomic, occurrence and science projects to provide the provenance of taxonomic name identification
- Monitoring and react to developments in AI in regards to publishing, data access and requirements
- If a joint statement from different partners is published it is written as usual by members of the group and submitted to the approval of the boards for endorsement (BHL, EC for the CETAF, SPNHC council)

- **5.2. Plan**

- Copyright and data paper currently submitted to EJT
- Workflows to publish XML first-based prospective publications
- Ongoing COST paper on the obstacles and technical requirements to create digital accessible knowledge
- Recommendation Paper on preprint/postprint: definitions, pros and cons, recommendations (6 pages maximum)
- Position paper on the new EU AI act in the next future to plan (is AI of use for taxonomic publishing, can we trust it; impact of the EU AI act legislation; ethical questions and environmental impact)
- Vision and or future of scientific publishing e-Publishing Group position paper
- A link to a taxonomic concept provided as provenance for taxonomic identification

- **5.3. Planned activities**

- Ongoing paper. To be published in 2025 (currently in the revision stage, paper submitted in EJT). Buschbom J. et al. Open data in publications - non-copyrightability and attribution as drivers for equity, science and innovation.
- Ongoing conferences for 2025
 - **BHL 2025** April, Berlin: Bridging Data and Nature: Connecting Information, Technology, and Biodiversity Presentation by L. Benichou, EJT hosted portal on GBIF: how to switch from openness to FAIRness Presentation by D. Agosti, Disentis Roadmap: a decadal plan to liberate data imprisoned in biodiversity literature
 - **Workshop 2B**, by P. Mergen, L. BÈnichou & D. Agosti. Making sense out of BHL
 - **SPNHC 2025** May, Lawrence, KS, USA SPNHC meeting *Challenges and Opportunities for Modern Collections*
 - (Symposium 06): *Liberating imprisoned biodiversity data: applying a FAIR workflow to academic Publications*
 - (Symposium 15): *The Disentis Roadmap: towards alternative metrics for collection usage (WKSH08): Unlocking the Treasures of Natural History Collections: Scholarly Publishing in the Digital Age*
 - **TDWG 2025** Oct. Bogota, Colombia Living data (workshop): Liberating and re-use of data imprisoned in scientific literature Living Data (Symposium): *The Disentis Roadmap: A decadal roadmap for liberating global biodiversity knowledge from scientific literature*
 - **CETAF 2025** Nov. Berlin, DEST Training in preparation on *liberation and reuse of data within taxonomic publication*

• 5.4. Achievements

Papers

- CETAF recommendation for Open Access and Authorship citations: <https://cetaf.org/wpcontent/uploads/Guidelines-e-publishing.pdf>
- Opinion paper published on 13th Nov. 2018 BÈnichou, L., GÉRard I., Laureys & Price M. (2018). Consortium of European Taxonomic Facilities (CETAF) best practices in electronic publishing in taxonomy. *European Journal of Taxonomy*, (475). <https://doi.org/10.5852/ejt.2018.475>
- Paper published on 23th Nov. 2019 regarding Guidelines on how to present material citation to ensure a better semantic enhancement of specimen data in taxonomy literature. <https://doi.org/10.5852/ejt.2019.586>
- Joint statement on best practices for the citation of authorities of scientific names in taxonomy by CETAF, SPNHC and BHL. Published in RIO in Sept. 2022 <https://doi.org/10.3897/rio.8.e94338>
- Recommendations for use of annotations and persistent identifiers in taxonomy and biodiversity publishing. Published in Nov. 2022 in RIO. <https://doi.org/10.3897/rio.8.e97374>
- Joint statement by CETAF, SPNHC and BHL on DATA within scientific publications: clarification of [non]copyrightability. Published in Nov. 2023 in RIO <https://doi.org/10.3897/rio.9.e115466>
- Liberate the power of biodiversity literature as FAIR digital objects. BiCIKL policy brief. Published in April 2024 in RIO <https://doi.org/10.3897/rio.10.e126586>

Conferences

- SPNHC/TDWG 2024 on Okinawa, Japan in September 2024 Presentation: Non-copyrightability of data in scientific publications: a free-for-all or a global commons partnership?
- WBF in Davos in June 2024: Session 'Opening up and preparing scientific publications for the chat-GPT age'
- IBC in Madrid in July 2024 Symposium 'The New value of scientific publications in the digital age'
- IBC in Madrid in July 2024 Presentation: The Digital Extended Specimen Network: from manual links to machine-action accelerating network generation
- Disentis Bouchout+10 meeting with focus on liberating data from publications
- Sept. 14-15 2023 Geneva: BiCIKL Workshop for publishers: Semantic publishing biodiversity data liberation, linking and FAIRness
- Oct. 2022 TDWG Sofia: WKSH11 Data liberation for open knowledge systems: the legal landscape of data licensing in publishing
- June 2022: Symposium at the SPNHC meeting in Edinburgh 'All the cool stuff a taxonomic journal can (should?) showcase through semantic enhancement'
- Oct. 2019: Symposium at the BiodiversityNext ST13 Enhancing taxonomic publications for dynamic data exchange and navigation

6. Timeline and Lifetime

- Once a topic is accepted, regular meetings every two weeks would be organised to deliver a paper/organise a workshop etc.
- A topic should not exceed a year from the beginning of the discussion and the deliverable (or submission in case of a published paper). This requires topics to be of suitable scope. Should a topic develop into a larger question, then a conscious decision needs to be made about how to proceed.
- Some topic might arise from the community and would need to be thoroughly discussed and define with the EC or general assembly (for instance the lobbying made for having a taxonomic category for impact factor was finally abandoned after decision during a general assembly when DORA declaration was signed; or as another example the WG worked to propose recommendation for OA and authorship citation as an outcome of workshop organized after the general assembly).

7. Roles and Responsibilities

The E-Publishing Working group welcomes and encourages membership from all publishing staff and librarians from CETAF institutions and beyond the CETAF members anyone from identified partners (SPNHC, BHL, Plazi...) with expertise in publishing, dissemination, data mining who share the views and objectives stated in the present document.

The E-Publishing WG addresses:

- Scientific Community within CETAF institutions
- The scientific community in other fields
- Stakeholders, Policy makers, Open Research Europe, EOSC
- Professional staff in publication or library who do not feel confident enough yet to be members
- Other publishers and particularly commercial publishers publishing taxonomy • Taxonomic databases, eg IPNI; Zoobank, ChecklistBank,
- AI access: eg via Biodiversity PMC, AI community to raise awareness of all the dimensions and their machine-to-machine tools

Coleaders:

- Laurence BÈnichou laurence.benichou@mnhn.fr (publishing house head)
- Isabelle Gerard: isabelle.gerard@africamuseum.be (publishing house head)

**Members:**

- Donat Agosti (CEO Plazi)
- Jutta Buschbom jutta.buschbom@statistical-genetics.de (SPNHC) - Steven Dessein steven.dessein@plantentuinmeise.be (Director)
- elisa herrmann elisa.herrmann@mfn.berlin (Library and Publishing, BHL)
- Kvaček Jiří jiri.kvacek@nm.cz (Director)
- Andreas Kroh andreas.kroh@NHM-WIEN.AC.AT (Publishing house head & deputy science - director)
- Patricia Mergen patricia.mergen@plantentuinmeise.be (international projects liaison officer)
- Lorna Mitchell LMitchell@rbge.org.uk (Library)
- Celia Santos mcncs798@mncn.csic.es (Curator)
- Erik Smets erik.smets@naturalis.nl (former science director)
- Peter Wilkie (Editor-in-Chief of the Edinburgh Journal of Botany)
- Daniel Whitmore daniel.whitmore@smns-bw.de (Entomology Curator)
- Maarten Van Steenberge ;
- Chris le Coquet-Le Roux; (Publishing)
- Lyubomir Penev "Lyubomir Penev" ; (Publishing house head)

For CETAF

- Alessandro Marchi
- Ana.casino@cetaf.org

8. Governance and Decision-Making Structure

The decisions are taken collegially, based on the members experience and sometimes the demand of the community. The group is mostly animated by its co-leaders and one of the members takes the lead on a specific topic. If a conflict arises, it will generally be resolved by compromise through discussion.

9. Communication and Collaboration Tools

Each topic is discussed during regular video conference meetings (various platforms are used) and a document is shared and collaboratively edited by the members using a cloud platform (generally Google Drive).

An in-person meeting is usually organized close to the general assembly meeting with the people already attending the general meeting (an hybrid meeting is usually organized to accommodate the members who are not attending in person).



10. Stakeholder Engagement

For greater alignment and effectiveness, the group includes active members from the partner communities: BHL, Plazi, TDWG, and SPNHC...

- Link with CETAF EPAG to communicate needs and look for funding opportunities.

11. Resource Planning – Human, Technical, Financial

Most of the time, the members group try to take the opportunity of conferences or symposiums to present one, or several, topics they are working on. It was the case for meetings organized under the umbrella of SPNHC or TDWG, in 2022-2025. However, the 'branding' of the CETAF E- Publishing WG is not always clearly stated. Funds will be asked for the organization of a specific joint workshop (E-Publishing WG is working on one dedicated to liberation of data as a DEST training)

