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Building Bridges For Social Justice In Global Publishing: Seeking The Mexican Perspective

By: **Allan Scherlen**

Abstract
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Presenter

ABSTRACT

At the NASIG 2019 Conference, the presenter outlined how the dominance of English-language publishers based in the Global North negatively impacts researchers in Puebla, Mexico. Universities in the Global South must compete in world-wide university ranking systems, which intensifies the pressure to compete with researchers in the Global North to publish in journals of the Global North in order to demonstrate global competitiveness and local career standing. To support those competitive publishing expectations, institutions of the Global South must also subscribe to English-language journal packages of the Global North, thus locking in a cycle of academic publishing dominance. Meanwhile, Latin America is developing quality Open Access (OA) alternatives. In May 2018, the presenter received funding from a NASIG grant to interview journal editors and librarians at universities in Puebla, Mexico. Through these interviews, the presenter sought to explore challenges for researchers publishing in Global North journals, discuss the role of OA at the interviewees' institutions, consider the future outlook for OA in Mexico, and examine the social justice implications of the academic journal publishing ecosystem. The presenter reported on findings from the interviews and invited members to discuss how engagement with researchers from the Global South can help the global scholarly communication ecosystem become more equitable.

Introduction

The presenter, Allan Scherlen, is a librarian at Appalachian State University, a medium-size university in the mountains of North Carolina. For years he has worked with other librarians to manage a library journal budget that was challenged by journal subscription prices that have gone up 4 to 8 percent annually. Consequently, he followed developments in the Open Access movement in journal publishing that sought alternatives to this unsustainable model.

In recent years, he has seen national research organizations in Europe pushing for agreements with major journal publishers of the Global North to make their state-funded research Open Access for their regions. But these plans generally include paying the publishers Author Processing Charges (APCs) or other upfront arrangements so that the landscape turns from pay-to-read to pay-to-publish. What is missing from, but vitally needed in, the international discussion on how to build a fair and just model of global research exchange are voices from the Global South.

In order to better understand how the Global North's domination over academic publishing and higher education impacts researchers in the Global South, the presenter spoke directly with people affected. Supported by a NASIG travel grant, he arranged to meet with librarians and journal editors at three exchange partner universities in Puebla, Mexico. The purpose was to learn how practitioners in the closest nation in the Global South to the United States think about the current state of journal

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publishing, explore challenges for their researchers, and consider how involved their universities are in Open Access alternatives.

Background

After a brief introduction, the presenter gave an overview of the context of the global problem that links (1) the drive among nations for a competitive edge in the global knowledge economy to (2) competition in university global ranking to (3) expectations for researchers in the Global South to publish in journals headquartered in the Global North.[1] A major underlying problem with the current global research exchange system is that criteria for global higher education ranking are largely set in the Global North for the Global North. Major university ranking systems judge universities in part on their library collections, and, in particular, their access to top-tier, English-language journals of the Global North, as well as the international publishing reputation of their faculty members.

To bolster their rankings, universities in the Global South also expect their researchers to publish in and be cited by others published in Global North journals. We can begin to see how the linkage of global ranking of universities to corporate, English-language journals headquartered in the Global North can have social justice rammifications for institutions and researchers in the Global South.

Global dependency on established commercial journals

With Global North commercial journals linked to university ranking, we are faced with a global dependency on established academic journals based in the Global North. A few large corporate publishers hold a captured market–a global higher education network of universities vying for global recognition. At the same time, many who carefully examine the current state of academic publishing realize that the corporate model of journal publishing is economically unsustainable and socially unfair to those who cannot afford access. Yet it seems almost impossible to get away from the influence corporate journal publishers have over global scholarly communication.

The Global South's OA progress

There has been gradual progress over the past twenty years in developing models for sharing research through various Open Access initiatives, though often disconnected regionally. In the Global North, two roads to opening access have been developing: the growth of Open Access journals that primarily depend on APCs and ongoing efforts to persuade authors to deposit work in Open Access repositories. The non-corporate model of OA being successfully pursued in Latin America that does not entail APCs has largely been ignored in the North. So, twenty years after the OA movement began, we are still far from a truly Open Access world of knowledge exchange.

In recent years, those in the Global North have seen pressures placed on the corporate giants in Europe to come up with OA arrangements for their regions, such as Plan S, that preserve the corporate publisher's powerful place in the system. Such plans primarily benefit researchers in Global North nations. "Why must we be tied to giant corporate journal publishers?" the presenter asked. "Why can't the Global North work with the rest of the world to build world-wide Open Access that is inclusive and fair?"

But how do we get people in the Global North to see it? The presenter noted how informative it is to ask researchers at institutions in the U.S. to imagine themselves in a world where, in order to gain promotion and tenure at their university, they would be expected to publish in Chinese or Russian journals in those languages. Researchers at institutions in the Global North, he found, are generally oblivious to the privilege they enjoy or the global inequities created by the current academic publishing-university ranking system complex.

The Global South's missing voices

The presenter argued that what OA voices from the Global South, particularly from Latin America, greatly need is international discussion on opening access to journal literature. But while the North ignores those voices, institutions throughout Latin America have been building their own separate Open Access networks. They have shown that their OA systems can be successful without capitulating to corporate publishers or expecting authors to pay publishing fees. The presenter argued for the need to find ways to bring our mostly disconnected Open Access systems together to build truly inclusive global scholarly communication. This union begins, he believes, by listening to the problems caused by the Global North's dominance and by learning from the Global South's OA successes, especially those developing in Latin America.

The interviews in Puebla, Mexico

In May 2018, Scherlen visited three universities in Puebla, Mexico to interview local practitioners about their challenges and frustrations as well as their successes and ideas for building a sustainable and fair OA ecosystem. Specifically, he chose to visit Benemérita Universidad Autónoma de Puebla (BUAP), a state public university; La Universidad de las Américas Puebla (UDLAP), a private secular university; and Universidad Iberoamericana, Puebla, a private Catholic university.

Within those universities, he chose to interview librarians and journal editors because librarians work closely with researchers in accessing the journals they need and journal editors should be attuned to local and regional issues related to journal publishing and Open Access developments. With the help of a translator and digital recorder, Scherlen was able to collect their input and later reflect on their perspectives.

Topics discussed in the Mexico interviews

The interviews covered seven topic areas:

- Challenges for researchers caused by the language barrier of journals of the Global North
- Importance for researchers to publish in Global North journals
- Faculty members' awareness and trust in Open Access
- State of Open Access at their institution and in Mexico
- Challenges facing Open Access development in Mexico
- The outlook for Open Access development in Mexico and Latin America
- How our institutions can collaboratively work toward achieving goals of journal access and equity

Findings from the interviews

Both the librarians and journal editors confirmed much of what the presenter had discovered in researching the publishing and access challenges faced by institutions and researchers in the Global South, but added to that knowledge by highlighting aspects not fully explored in the current literature.

The Mexican librarians' perspective

The presenter noted that the librarians interviewed expressed interest in possibilities for working with Global North partner universities, such as his, to help researchers in mutually beneficial ways, including cooperative digital projects, bilingual translations, and sharing research in OA repositories. The librarians also expressed a number of concerns that are summarized below:

- Concern with annual increases in subscription costs of English-language journals of the Global North;
- Concern that researchers must have access to English-language journals of the Global North in order to publish in those journals for career advancement and to acquire grants;
- And concerns about educating faculty members about the benefits of OA as the librarians have discovered that faculty members are still skeptical of publishing in OA venues and/or express the need to acquire "points" by publishing in journals with high impact and international recognition.

The Mexican journal editors' perspective

The journal editors interviewed were proud of the successes in Open Access initiatives already well underway in Mexico and Latin America, such as La Red de Revistas Científicas de América Latina, el Caribe, España y Portugal (Redalyc), which embraces a "non-profit publishing model to preserve the scholarly and open nature of scientific communication."[2] Scientific Electronic Library Online (SciELO) is another example of a burgeoning OA initiative.[3] Nevertheless, they also voiced a need for better integration of Open Access standards to make access to digital research in Latin America compatible with the rest of the world. The journal editors interviewed expressed concerns not mentioned by the librarians related to Open Access publishing and repositories in Mexico. For example they expressed:

- Concern about continued expectations for researchers to publish in corporate Global North journals;
- Concern about whether there will be continued funding for repository systems and Open Access journals;
- And concern about the Mexican government making long-term deals with large publishing corporations.

Moving to social justice in global scholarly communication

The presenter discovered the value of building relationships across borders by listening to Global South practitioners' OA concerns and suggestions for solutions. It is also essential to share those findings at meetings in the Global North. More specifically, he discovered first-hand that researchers at partner institutions of higher education in the Global South are indeed disadvantaged in the scholarly communication ecosystem. They confirmed that they must compete for global rankings based on assessment criteria set in the Global North, criteria that includes providing access to expensive, English-language journals of the Global North and rewarding researchers who publish in Global North journals with professional standing and grant funding.

Questions remain about how to coordinate Global North and Global South Open Access development away from a system of information privilege dominated by the Global North and toward a socially just global academic publishing system. One mechanism for finding a workable global solution is the inclusion of perspectives from the Global South that reveal successes that do not entail a central role for commercial publishers or expecting authors to pay APCs. At the practitioner level, we can each reach out to other institutions to open a dialogue and build alliances that can, in turn, push our educational and research institutions to move toward a more socially just future for global research.

Audience discussion

Several members of the audience expressed appreciation for the session. One person mentioned that her U.S. institution was building a partnership with a university in Asia that has goals similar to

those outlined in Scherlen's research. Two audience members who were affiliated with journal publishers expressed support for finding global equity in the journal publishing process and moving away from the current dominance of language and controls of the Global North. A student attendee from Mexico asked the presenter about his efforts to gain input from Open Access organizations in Mexico. The presenter agreed that such input is vital but that had not been part of his Puebla research. Scherlen is considering future research that would entail additional interviews in Mexico that may include talking with directors of Redalyc and SciELO, as well as other important actors in Mexico's Open Access development.

Notes

1. Ellen Hazelkorn, "Rankings and the Battle For World-Class Excellence: Institutional Strategies and Policy Choices," *Higher Education Management and Policy* 21, no. 1 (2009): 1–22. doi:10.1787/hemp-v21-art4-en; and Joel Spring, *Globalization of Education: An Introduction*, 2nd ed. (New York, NY: Routledge, 2015).
2. Our Model, "Red de Revistas Científicas de América Latina y El Caribe," https://www.redalyc.org/ (accessed February 5, 2020).
3. About SciELO, "Scientific Electronic Library Online," https://scielo.org/en/about-scielo (accessed February 5, 2020).

Suggested readings

Baildon, Michelle. "Extending the Social Justice Mindset: Implications for Scholarly Communication." *College & Research Libraries News* 79, no. 4 (2018): 176–179. Accessed February 16, 2020. https://crln.acrl.org/index.php/crlnews/article/view/16929/18639.

Poynder, Richard. "The OA Interviews: Arianna Becerril-García, Chair of AmeliCA." *Open and Shut?* (blog). Accessed May 18, 2019. https://poynder.blogspot.com/2019/05/the-oa-interviews-arianna-becerril.html.

Poynder, Richard. "Plan S: What Strategy Now for the Global South." *Open and Shut?* (blog). Accessed April 9, 2019. https://poynder.blogspot.com/2019/02/plan-s-what-strategy-now-for-global.html.

Notes on contributor

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