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ACRL-SPARC Forum

What we learned about community alignment and equity for emerging scholarly infrastructure

During ALA's 2019 Midwinter Meeting hosted in Seattle, ACRL, in partnership with SPARC, hosted a panel exploring emerging models for supporting open scholarly infrastructure that places an emphasis on alignment with community values, considerations of equity, and why this is important.

Heather Joseph from SPARC moderated the forum, highlighting the work and perspective of the panelists: Kristen Ratan, cofounder of Collaborative Knowledge (Coko) Foundation; Leslie Chan, associate professor, University of Toronto-Scarborough Centre for Critical Development Studies; and Ashley Farley, associate officer of knowledge and research services, Bill and Melinda Gates Foundation.

The panelists provided an overview of how their work addresses existing inequities in the traditional academic publishing system, and highlighted strategies for ensuring that these inequities are not replicated in new, open systems. The aim of this session was to encourage librarians to proactively and intentionally address these inequities to build a more community- and mission-driven ecosystem for the dissemination of knowledge. These actions will play a central role in shaping libraries' role in the scholarly enterprise, now and for the future.

The conversation included both the perspective of people who are actively working to build open, community-aligned infrastructure and research funders who are committed to supporting an open system for scholarship that prioritizes equity and the needs of researchers. The session contextualized these models within the broader market for scholarly infrastructure and highlighted the role of libraries in creating a future where values are prioritized over vendors.

Kristen Ratan: Creating community-owned infrastructure

The promise of open science is that research is communicated in its entirety, with all of the data, code, protocols, media, and contributors forming a constellation of objects that represents the full body of work. But, mired in print paradigms, proprietary infrastructure, and subscription business models, scholarly communication is slow, incomplete, and often closed. As research results begin to be clear, they are saved up so that researchers can get the best publication out of them. Publishing hasn't evolved much since the print days. The infrastructure is old and largely proprietary and in-

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creasingly commercially owned. Much of the content remains behind paywalls. The growing trend in mergers and acquisitions of scholarly infrastructure is a concerning trend.

The path to get to rapid, complete, and open research communication requires an investment in the foundation, the digital roads, bridges, and buildings that we need to evolve research and research communication practice. And to secure the rights of everyone to produce knowledge and to collectively benefit from its outputs. This is the mission of the Coko Foundation, to establish foundations for a shared investment in scholarship to be in the commons. For digital infrastructure to be in the commons, most agree that it must be open source. And not just licensed as open at some point, but built in the open and locked open in perpetuity.

To be intentional about securing and sustaining open projects from the outset, it is important to leverage community engagement and start mandating the implementation of open source practices and open standards in ways that blunt the ability of companies to strangle entire market segments.

In addition, open source technologies must offer complete and end-to-end solutions. To compete with slickly marketed corporate offerings, open source infrastructures must be knit together to create wholecloth solutions that adopting organizations can recognize as meeting their needs and rely on. We need a range of services to customize, host, operate, and maintain infrastructures. And we need sustainability models that can assure the adopting marketplace that these solutions will last.

Open source is people. It's about actively soliciting the participation and leadership of those currently outside of open source. It's about leveling the playing field for open science and open access to have a chance to truly thrive. It's all of us coming together to use the power of technology to bring about greater good.

Leslie Chan: Invisible in the open–Why we need to reframe discourse on infrastructure

It is a common assumption that as scholarly publications are made "open," their visibility will automatically increase as they will be more easily discoverable and subsequently cited. This was thought to be particularly important for scholarship that has historically been marginalized by the dominant mainstream knowledge production system and for scholarship from the Global South.

However, while we have been putting much of our attention on the visible problem of "access," namely the barriers created by paywalls and licensing restrictions, we have not been sufficiently thoughtful about the many hidden and invisible barriers that are deeply embedded in the global system of scholarly publishing, which is largely owned and controlled by a small handful of for-profit multinational publishers.

We should be rightly concerned with the concentration of market power these firms possess, but we should be far more concerned with the hidden and invisible powers that they are able to exercise. These powers mean that a few publishers extract and accumulate resources at scale and stifle competition, set technical standards and social norms (e.g., the journal impact factor and the incentive structure it engendered), determine the criteria of participation in knowledge production (e.g., who gets to publish and in what language), influence public agenda and policy decisions, and invent new rent-seeking regimes. Indeed, in the last few years, we have been witnessing an accelerated pace of acquisition of scholarly communication infrastructure by the same dominant multinational publishers. They are busy integrating their acquisitions into end-to-end platforms and creating new ways of locking in researchers and their institutions who are increasingly addicted to the university ranking games, as higher education itself is also a global big business.

To be sure, the consolidation of power by publishers would not be possible if not for the fact that far from being an egalitarian and

meritocratic system, academia is already in-grained with deep structural and epistemic in-equalities. Racism, sexism, and other forms of discrimination are still common. Nowhere are these forms of inequities more pronounced than in scholarly publishing, as it remains a stronghold for maintaining the status quo, and this is one of the main reasons why many from around the world are calling for the decolonization of academia.

It is increasingly clear that simply impos-ing "openness" on top of this closed knowl-edge system will not lead to meaningful and lasting change. Transformation means acknowledging the culture of discrimination and exclusion first, both within academia and within academic publishing, and then moving towards an inclusive system that values the diverse traditions of knowledge systems and ways of knowing.

Tackling such a complicated challenge calls for collective actions and the alignment of core values as the starting point. Libraries, funders, developers, and the research com-munities are actively rethinking how to build and control our own scholarly communica-tion infrastructure, along with the services, processes, and outputs that best support scholarly communication needs in diverse social and intellectual contexts. At the same time, we need to look to our colleagues from the Global South, and the AmeliCA[1] (Open Knowledge for Latin America and the Global South) initiative is an instructive example of how to think about and build community-based infrastructure. They begin with the crucial question of open for whom and by whom, a question that we often overlook. Being able to frame the problem from the perspective of the community is crucial, as it strongly determines the kind of solutions we can imagine.

A key invisible power of the oligarch pub-lishers is their ability to frame the problem as one of market and economics. We need to reclaim the power to frame the problem for ourselves, with our collective value of knowledge as the public good and commu-nity well-being at the core.

Ashley Farley: Lesson's learned from advocating for openness

The Bill and Melinda Gates Foundation views its open access policy as an example of its commitment to information sharing and transparency. By freely sharing high-quality research as soon as it is available, the foun-dation and its partners can develop more ef-ficient and effective strategies to tackle the problems we are trying to solve. The values of open practices fit well into the mission of the foundation and have the potential to spur innovation and help the foundation more quickly and collaboratively solve the world's toughest problems.

Much of the scholarly communication ecosystem is built around relationships that require a lot of trust. Librarians and researchers trust that producers and pub-lishers of information are truthful and accurate. The general public is trusting that researchers, the government, and academic institutions are acting in their best interests. Organizations, particularly funders, that create policies or mandates, especially radical ones, need the trust of their constituents. Trust is an important tool to combat fear, and the research can be rife with fear—fear of failure, fear of not establishing a career, fear of being open, fear of losing control. These fears aren't necessarily unfounded, but it can be argued that they do present obstacles to reaching a fully open access ecosystem. Open infrastructure can help build trust in the system, as well as empower research-ers to build trust within their communities.

Accomplishing this will require time and proper resourcing, coupled with buy-in from the community. Alongside with changes in technology, changes in behavior will be re-quired. Reinventing the scholarly communi-cation ecosystem creates an opportunity for more collaboration, especially in launching and sustaining radical new infrastructure. Change is hard, and often it feels that the system is taking forever to see a different outcome. Open access advocates have paved the way for building trust and infra-

structure for new open practices and platforms. It is their work that has encouraged funders and institutions to begin signaling change in incentives and research priorities.

Conclusion

The future holds radical changes for the scholarly landscape, and libraries can play a critical role in the new paradigm shift. Librarians have the established trust of researchers and can help them progress beyond thinking of open as merely access to information.

If open source is people, then librarians are the leaders, helping everyone navigate the bridges and roads to find the route that best fits their needs. The decisions that libraries make individually and collectively about what tools to use and what infrastructure to support—and under what terms—will determine whether we meaningfully address inequities created by legacy academic publishing systems or simply recreate them in new ways. These decisions will shape libraries' role in the scholarly enterprise, now and for the future.

For example, the discovery tools most commonly used by libraries tend to be licensed from commercial vendors, and so are the databases of content they search.

They reflect the inherent biases of those organizations, prioritizing content from the Global North, and rendering invisible a large swath of scholarship not considered to be "mainstream." This is an important reminder that decisions about collections, tools, and metadata are not neutral and have consequences. Libraries should be much more deliberate in questioning these decisions, and challenge existing assumptions before deciding what to buy.

Similarly, infrastructure is often something we notice only when it is broken; and when this happens, we find we don't know who to call. Rather than continuing this dependency, libraries should take on a more active role in creating, supporting, and sustaining the infrastructure we use, to ensure that it truly reflects and supports the values our institutions hold. As library partnerships with publishers, open source platform creators, and discovery tools become more common, we have a unique opportunity to influence the emerging scholarly communication system during the design process, and build an equitable and inclusive system—one that is truly open for all.

Note
1. http://www.amelica.org/en/. ✕

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3. Visit http://library.temple.edu/textbook-affordability.

4. See more at https://www.arl.org/focus-areas/arl-academy/communities-of-practice/reimagining-the-library-liaison.

5. Association of Research Libraries, "Talking So Faculty Will Listen, Listening So Faculty Will Talk: Engagement Strategies for Library Liaisons," ALA Annual Conference, June 26, 2017, accessed January 14, 2019, https://www.arl.org/events/upcoming-events/event/238#.WfzXXmhyLcs.

6. Martin Tsang, "Faculty Conversation Project Tips," accessed January 14, 2019,

https://www.arl.org/storage/documents/Faculty-Conversation-Project-Tips.pdf.

7. Steven J. Bell, "Academic Librarians Have Something to Sell," *Library Journal,* July 13, 2107, accessed January 14, 2019, https://www.libraryjournal.com/?detailStory=academic-librarians-have-something-to-sell-from-the-bell-tower.

8. The full report, with our question set, is available at https://docs.google.com/document/d/1P5Kn7OGYqEH-jFK4FsSZlomCM6HCsxbO2L_zEzT_E4U/edit.

9. Merchant, "To Change Someone's Mind, Stop Talking and Listen." ✕