

Bridging Information Worlds: Talking to Northern Students and Southern Scholars About Global Inequities in Scholarly Communication

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Abstract

The topic of global inequities in scholarly communication is complex and may be viewed from different perspectives depending upon multiple variables, including where you live in the world. This "Report from the Field" presents the author's experiences and reflections on facilitating formal discussions of this topic at the Monteverde Institute (MVI) in Costa Rica. The Monteverde Institute (MVI) is a Costa Rican non-profit organization that provides infrastructure and support for education abroad programs focused on community engaged scholarship, as well as support for both international and locally based researchers who focus their study in the area. Its middle vantage point provides unique advantages for engaging multiple constituencies in conversations about the inherent inequalities of our current scholarly information universe from both Global North and Global South perspectives. This report focuses on the author's experiences and reflections on discussions about equity issues in scholarly access and production, with North American students as well as local researchers and community members in Latin America that took place between 2017-2019. The richness of engagement with this topic was facilitated by the opportunities afforded by the ability to hear multiple perspectives, backgrounds, and lived realities in this single space.

Keywords: global scholarly communication ecosystem; inequity; information literacy; information social justice; Latin America

Publication Type: special section publication

Introduction

lobal inequities in the production and dissemination of research and scholarship between countries in the Global North and countries in the Global South inhibit the equitable flow of research in all directions, which has broad implications for the advancement of knowledge especially when considering complex global issues and problems. The purpose of this "Report from the Field" is to explain and reflect upon discussion-based presentations that I have had on the complex topic of global inequities in scholarly communication, with both Northern students and Southern scholars on site at the Monteverde Institute in Costa Rica. The opportunity to have these discussions in a single place with multiple perspectives represented has been unique and illuminating, and points to the inherently global importance of a critical view of our global scholarly information ecosystem. Literature that has informed my knowledge of the subject is interspersed throughout the descriptions and reflections of the discussions.

For the purposes of these discussions, broad characteristics of North/South inequities in scholarly



communication have been elucidated. Scholarship that is widely recognized as the most prestigious global scholarship is published by just a few proprietary publishers in the Global North, such as Elsevier, Wiley, and Springer, who publish primarily English language journals, with cost prohibitive pricing policies for much of the world. Increasingly, these publishers offer open access options for research publication that necessitate authors paying substantial article processing charges, also preferencing larger and funded research studies that predominantly have lead authors from North American and European nations.

On the flip side, researchers from countries in the Global South, such as African and Latin American countries, are challenged by more limited resources for research infrastructure and availability of funding for all phases of the research and publication process. While there are increasing, predominantly open access publication outlets for research in the Global South (such as the long-standing SciELO portal for predominantly Latin American journals), the regional journals accessible in these portals do not carry the same level of global prestige as the proprietary journals originating in the Global North, although they cover important local and regional research. Southern scholars have recognized this as a preferencing of knowledge that has evolved through a history of colonialism (Gómez et al., 2013; Santos, 2018).

Setting and Background

The Monteverde Institute (MVI) is a Costa Rican non-profit organization that provides infrastructure and support for education abroad programs focused on community engaged scholarship, as well as support for both international and locally based researchers who focus their study in the area. MVI students in education abroad programs, generally from North American institutions, are involved in community-engaged scholarship and develop ties to the local community through their work, their homestay experiences, and locally based researchers and instructors who engage with them. As a local community organization, the Monteverde Institute is in a unique and strong position to organize, facilitate, and support a high level of community interaction.

Hamilton's 2019 article entitled, "Facilitating Engagement among Academic and Community Partners: The Monteverde Institute's View from the Middle," provides a detailed description of the opportunities afforded to the success of the organization due to its uniquely intermediary role and middle ground of being locally and community-based, while supporting global education and research that is grounded in community. The intent of this "Report from the Field" is to build upon the idea that the Monteverde Institute's middle ground provides multiple advantages, and to focus on something not generally considered: information social justice issues and the inherent inequality of our current scholarly information universe are well-illustrated in this middle environment, and this vantage point provides an excellent and experientially-based educational opportunity to engage multiple constituencies in a conversation about these inequities.

The reflections in this article are based on an amalgam of experiences discussing global inequities in access to and production of scholarly research from a place-based Latin American research perspective, both with education abroad students and members of the local research community in Monteverde. The focus will be on six talks and discussions that took place at the Monteverde Institute in Costa Rica in June and July of 2017–2019, when I was on-site. Five of these talks were given primarily to undergraduate university students from the United States, with local staff and researchers present. One of these talks was geared to the local biologists' group, with

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an open invitation to the community. It is important to recognize from the outset that all talks were given in the English language, with translation services available for the local biologists' group.

Monteverde is an area that is located at the top of the continental divide in northwestern Costa Rica, in the province of Puntarenas. A population of roughly 7,000 in the Monteverde Zone, the area is unique in that it is a rural Costa Rican community, home to a small North American Quaker community that settled in the higher elevation in the early 1950s, and an international ecotourism destination. There is daily intercultural communication among the residents and visitors.

In the late 1970s ecotourism began to develop, as Monteverde became known as a destination for scientific researchers and students focusing their research in the Monteverde Cloud Forest Preserve. Home to an extremely biodiverse high elevation cloud forest ecosystem, the Monteverde Cloud Forest Preserve is a private protected area that sits at the top of the continental divide. In the mid 1980s, as the Costa Rican economy recovered from a serious debt crisis, and there was investment in both domestic and foreign infrastructure focusing on nature-based tourism, Monteverde continued to develop as an international ecotourism destination (Jones & Spadafora, 2016).

Recognizing the increased scientific interest in the area, increasing ecotourism, and the resulting changing nature of the local economy and community, the Monteverde Institute was established in 1986, to facilitate "high quality educational programs" for international students and provide a context for additional jobs and opportunities for local residents (Burlingame, 2019, p. 2). Over 30 years later, the Monteverde Institute focuses strongly on community engaged scholarship, and has hosted more than 600 courses for 11,000 students (Burlingame, 2019). Additionally, the Monteverde Institute provides resources and infrastructure for international and domestic research affiliates. The Monteverde Institute successfully upholds its three-pronged mission of the intersection of education, research, and community.

MVI is home to a small library, and I have been involved in developing its online presence and facilitating access to locally based research through creation of open access digital collections since 2007. In 2007, as a result of conducting a series of interviews with researchers in the area, I initially noted a large disconnect between locally based researchers and their inability to access the proprietary, scholarly journal literature they needed to frame their research, and the international researchers and students who had unfettered access to that important body of research-based literature through their home institutions primarily in North America. The frustration expressed by the community of local researchers and lengths they went through to get the information they needed provided a locally impactful example of the implications of global inequities in access to scholarly research. Additionally, initial consideration of the inequities associated with a predominantly one-way scholarly information flow from the Global North to the Global South prompted a multi-institutional collaboration (2008-2014) to create small-scale open access digital collections of locally based research outputs.

From the middle vantage point of the MVI, I began giving talks to education abroad students, local staff, and local researchers in 2017, focusing on discussing equity and justice issues in the scholarly communication landscape from a Latin American experientially based perspective, while considering the position of those of us associated with Northern institutions. Largely, our Northern students are unaware of the advantages they have in our scholarly information universe,



the societal forces that drive knowledge production and dissemination which privilege some and marginalize others, and the resulting implications for working toward solving complex global problems. However, they become thoughtfully engaged with these information social justice issues, more powerfully so when local researchers and instructors that they are working with contribute their perspectives. The reflections below represent the rich discussions that ensued from six presentations to different groups in June-July of 2017, 2018, and 2019. In all discussions, the ability to have multiple place-based perspectives in the room has led to very thoughtful discussions and commentary. In a sense, this defines the opportunities that the fairly unique middle ground of the Monteverde Institute provides for experientially broadening understanding of the fundamental inequities present in our complex global scholarly ecosystem.

The Student Presentations and Discussions

From the perspectives of being active participants in community engaged scholarship in rural Costa Rica, students from six education abroad programs, representing three universities in the United States, participated in a one hour long formal discussion entitled "Equity and Justice in Research Access and Production: A View from Latin America". In 2017, the first year these discussions were incorporated into the content of two education abroad programs at the Monteverde Institute, they were considered a pilot project to gauge the relevancy, interest levels, and engagement by students and staff, as this was outside the realm of the direct daily student focus of tropical ecology and conservation issues.

The 2017 pilot project was deemed successful as a result of positive student and staff feedback, and the degree and level of engagement of students, and their ability to provide thoughtful, written, reflective ideas in response to the prompt, "As future potential contributors to the scholarly information universe as the next generation of researchers ...what can the next generation of researchers do to work toward leveling the global information playing field?" The pilot project and its pedagogical grounding in the Association of College and Research Libraries Framework for Information Literacy in Higher Education is the focus of a recently published book chapter (Kutner, 2019) that contains detailed discussion and analysis of the experiences of that initial year engaging with education abroad students about structural inequities in our scholarly communication landscape from a place-based social justice perspective.

Topics covered in our discussion include:

- examining Web of Science search results on "Monteverde Costa Rica" to discuss: 1) why
 those affiliated with well-resourced higher education institutions have access to Web of
 Science and what that costs 2) the body of largely proprietary scholarly journal literature
 contained within and the restrictiveness of that model for sharing scholarship 3) the
 inherent linguistic bias of the English language in the database that represents "global"
 scholarship and cultural bias that represents Northern scholars;
- implications of Global Northern dominated scholarship on global climate change for developing place-based policy and practice and working toward global/ local understanding and culturally relevant modes for solving complex environmental problems (Blicharska et al., 2017);
- bias in publication by eco-climatic zone toward the Global North in comparison to the earth's land surface area (Karlsson, et al., 2007);



- production of knowledge in Northern countries vs. Southern countries and linguistic bias in agroecology publications (Gómez et al., 2013);
- impacts of the competition-based scholarly publishing model on Latin American scientific publishing (Vessuri et al., 2014);
- Latin American open access modes for scholarly communication and how they have evolved (examples of SciELO, Redalyc, Latindex, LA Referencia were discussed);
- Global North evolution of open access publications primarily through article processing charges (APCs); importance of institutional repositories for open access information dissemination; and
- infrastructure challenges in research production and dissemination in the Global South, with a Latin American focus.

The presentation and discussion have been annually updated, particularly regarding the evolution of the wider open access movement, such as Plan S and the University of California's cancelling of their Elsevier subscriptions (Global North), and Latin American open access approaches based on non-commercial scholarly publishing platforms (Global South). Additionally, updated relevant content is added that contributes dimensions to the discussion of global structural biases inherent in our knowledge production system. For example, resulting implications for developing effective place sensitive solutions to complex sustainability challenges are addressed (Nagendra et al., 2018).

The Presentation and Discussion with the Local Biologists' Group and Community (2018)

Much of the content described above also served as the basis for the local biologist and open community discussion. Additionally, more time was spent characterizing global scholarship (published largely by commercial, for-profit publishers; authors or lead authors are affiliated with institutions in the Global North; predominant language is English; indexed in Web of Science or SCOPUS) vs. regional scholarship (published in Global South regional publications, by regional authors, about regional knowledge, in the regional language, and in predominantly open access journals that are considered less impactful and of lesser quality by "mainstream" authors and academic institutions).

Also figuring more prominently into this discussion was the large shift in commercial academic publishing in the digital era from numerous small publishers to few large publishers, and the resulting implications of significantly rising costs of journal subscriptions and new publisher pricing models that are increasingly restrictive. The ways that open access are evolving differently in the Global North and the Global South were also covered, as was important functions of Southern regional journal publications for communicating locally relevant research and knowledge in local languages, accessible to all for pragmatic use to benefit local populations and as educational materials for local students.

Southern theory that deconstructs global geopolitical forces of the core and periphery of knowledge production and dissemination was drawn upon, particularly as there are deleterious effects of uneven representation of scholarship from the Global North on the fundamentally



global issue of climate change. For example, the Intergovernmental Panel on Global Climate Change has an underrepresentation of Southern researchers that impacts resulting strategies for climate change mitigation and adaptation (Czerniewicz et al., 2017).

The discussion, which lasted 90 minutes, was very active and passionate with this audience, raising large feelings of frustration with our predominant scholarly publishing ecosystem that preferences some and marginalizes many. The audience, a group consistent with the middle ground that the Monteverde Institute occupies, was a blend of expatriate and visiting native English-speaking scientists and community members, and Latin American scientists, bringing both multiple perspectives and common concerns into the discussion.

Reflections and Observations

Student Conversations

As an academic instruction librarian from the United States, the conversations reflected my professional background, interests, and expertise, privileged by wider societal forces, geolocation, and affiliation with a well-resourced university. At the same time, my experiences over twelve years of affiliation at the Monteverde Institute, understanding local researcher frustration with lack of access to scholarship they needed to inform their research, as well as the first-hand challenges involved in creating open access collections of locally based research with no budget, no existing infrastructure, unreliable Internet, and only through the perseverance of graduate student interns who themselves were engaged in a high impact learning experience, provided some context for understanding research and information challenges in rural Latin America. Drawing on these multiple experiences provided a middle place that grounded discussion with the multiple players who, from different perspectives, form a diverse research community in Monteverde.

The growing area of critical information literacy, defined as "a theory and practice that considers the sociopolitical dimensions of information and production of knowledge, and critiques the ways in which systems of power shape the creation, distribution, and reception of information" (Drabinski & Trewell, 2019, p. 1) was centrally represented in the student discussions. Additionally, the idea of critical information literacy as linked theory, reflection, and practice that was presented by Heidi Jacobs (2008) was contextualized in the student discussions that took place in high impact, experiential learning settings as seminally defined by Kuh (2008).

Students who had engaged with local researchers who were experts in their fields but lacked access to the proprietary scholarship that was needed to inform their studies indicated strongly that the future must be in open access publishing of scholarship. Their reflective responses indicated a serious sense that as the next generation of researchers they must be actively engaged in this endeavor. The students, who are focusing on community engaged scholarship in Monteverde, interact with local community members and understand from an experiential perspective that communication of the processes and products of their work, in the Spanish language, through multiple venues of accessible communication, is a highly important part of their outputs. Monteverde Institute staff, as local community members themselves, reinforce this. Students articulate the importance of communicating community-based research to the local community in the local language, in a variety of venues. They also advocate for use of local residents as research assistants.



Students, who were learning about their information privilege in powerful ways they had not previously considered consistently displayed empathy for those unable to access research and scholarship they needed due to prohibitive costs associated with expensive, proprietary journal subscriptions. Demonstrated in both student discussion and in their reflective responses to the prompt asking them to provide ideas for leveling the global information playing field as the next generation of researchers, a need for equitable global access to research and a desire to actively work toward that goal was an overwhelmingly recurring theme. Both importance of opportunities for reflection in successful international service-learning experiences and the development of empathy through this medium are reinforced by Stanlick and Hammond (2016).

Students also clearly understood the structural inequities inherent in a research landscape dominated by those from richly resourced countries with well-developed research infrastructure and the implications of this for limiting understanding of complex global issues. Additionally, students understood the clear disadvantages associated with an inability to read and write proficiently in the English language as a Latin American scholar, and the implications of the linguistic bias of what is considered highly regarded global scholarship. They were particularly empathic to this issue, as they were working alongside and interacting daily with native Spanish speakers who are the local experts in the community context. Student reflections overwhelmingly mentioned the need for community-based research to be first and foremost published in the native language of the community. MoChidrhe (2019) addresses the "hidden paywall" that the English language as the language of choice of global scholarly communication presents for non-English speakers.

So long as English remains the *de facto* language of global research and scholarship, the high costs in time and money that it imposes on non-native learners will inhibit information exchange, handicap academic careers, and impede public participation in research, especially in those regions where there is the greatest need for the opportunities that engagement with global scholarship promises and where articulate voices are most acutely missing from broader global conversations. (MoChridhe, 2019, p. 426)

Finally, the overwhelming empathetic response by students was their concern that community-based research in Latin America addresses problems or issues identified by the community as relevant to them, includes community members as active participants in the research process, and makes results of research widely accessible to community members through a variety of communication venues in the community's native language. While this is a reflection of the impactful community-engaged scholarship experiences the students were in the midst of, it also points to student ability to contextualize their experiences with regard to wider scholarly communication justice issues. This outcome is consistent with the philosophical concept of "moralized compassion" as applied to the student experience at engaged universities in a global and unequal world (Maginess & MacKenzie, 2018).

Student emotive responses were characterized by feelings of empathy, understanding, and a need for relevant and accessible community engaged research and scholarship. Additionally, they were quite clear that as the next generation of researchers, open access to research must be a priority and they repeatedly expressed that it is their responsibility to be actively involved with this endeavor. As undergraduates from richly resourced higher education institutions, they were largely engaging with concepts of global information inequities both in production and dissemination of scholarship for the first time. In that sense, the conversation was simplistic and

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not fully representative of the complexities and inequities in open access publishing that are continuing to evolve (for a critical discussion of the inequities emerging in open access publishing see: Schopfel & Herb, eds., 2018). Additionally, the ideas of cognitive injustice and epistemological injustice regarding representation of knowledges from the Global South (in the case of our discussion, Latin America) were only very briefly introduced to students and ultimately warrants further discussion as a much wider educational endeavor (see Santos, 2014 and Santos, 2018 for detailed, broad-ranging thought on the concept of epistemic injustice).

Local Biologists and Community Members Conversation

Discussion with the group of local biologists and community members elicited a different set of pragmatic and emotive responses. First-hand frustration with the dominant system of restrictive access to research and scholarship was a recurring theme, both with this group and with local researchers and staff present in the student discussions. Inability to access scholarly information at the point of need and the injustice of the restrictive commercial model of scholarly communication continues to be a large challenge for local researchers. Though access to the body of global scholarship has been made easier through services such as ResearchGate and Academia.edu, this still at times requires e-mailing authors for articles and waiting for responses. Sci-Hub was mentioned by one participant as his go-to place for accessing the scholarly journal literature that he needs for his research. He commented on his high success rate of obtaining articles he needs in Sci-Hub, and though aware that these articles are made available illegally, he felt that the immorality of the system behind the model of restrictive access to scholarship warranted and justified his use of Sci-Hub. Additionally, this group continues to use their social networks of colleagues largely affiliated with universities in North America to obtain and e-mail articles to them.

The model that has emerged as the predominant model for open access publishing in the global scientific literature, also driven by the few large commercial publishers of scholarship, is that of Article Processing Charges (APCs), shifting the burden of paying for publication to the authors. There was, as well, a large feeling of frustration with this model expressed by the discussion participants who do publish in this body of literature but cannot afford to pay the APCs, as researchers with little to no funding to support their research. Although fully and actively supportive of the concept of open access, the reality for at least one recently published author in the room was that he and his co-authors could not afford the \$3,000 APCs required to make their publication available as an open access publication in the specialized journal in which they chose to publish. Therefore, in order to publish in the prestigious journal that accepted their article, their scholarship became restricted to only those who could afford the journal subscription costs. In this particular case, the journal made an editorial decision to provide free access to the article, which was openly available for a period of time before it reverted to subscription-only access at the discretion of the journal. Discussion ensued about factors to consider when making choices about where to publish and authors' rights regarding author agreements with proprietary publishers.

Another theme that emerged in this discussion was the recognition of the English language as the lingua franca of scientific publication in the body of journal literature considered most prestigious, and what that meant particularly for the native Spanish speakers in the audience. One native Spanish speaker commented on the amount of time she spends translating articles for local colleagues who do not have the command of the English language that she has. She indicated that translation services such as Google Translate are so poor for translating scientific



research that she ends up doing it all by hand. Others felt confident that the technology exists to provide better translation services for scholarly research publication than is presently available. Stepping up the quality of translation services for scholarly publications should be a priority for journal publishers.

Finally, both native English speakers and native Spanish speakers in the audience acknowledged the prestige of publishing in the body of scholarly literature considered to be global publications. However, the native Spanish speakers were much more aware of the body of Latin American open access publications and the corresponding publishing platforms and discovery tools of SciELO and Redalyc.org than were the local expatriate native English language speakers. As a group, they were all unaware of the ability to search the SciELO database in Web of Science (from a pulldown menu that is not obvious and separate from their core collection). Web of Science provides a more powerful search interface than does the native ScIELO interface, and additionally provides detailed scholarly metrics information. There is no reason they should have been aware of this, given their inability to access the extremely expensive Web of Science database, and is yet another ironic reminder of the unequal scholarly information world in which we live. Referring to the inclusion of the SciELO database in Web of Science, Leslie Chan (2018) asks in a blog post, "has SciELO redrawn the unipolar and northern-centric nature of the global publishing system, enabling a multi-polar intellectual and linguistic diversity to flourish, or has (is) SciELO itself being redrawn in the image of the global north?" This is a complicated question that was mentioned but not adequately addressed in the discussion due to its complexity, the need to provide further background and contextual information for the audience, and the reality of our time constraints as darkness descended and the discussion had gone well over time.

Concluding Remarks

The middle ground that the Monteverde Institute occupies as a Costa Rican organization supporting community-engaged scholarship, with its strong ties to both the local community and North American higher education institutions, enables meaningful conversations about global inequities in scholarly communication across multiple perspectives, backgrounds, and lived realities. The Monteverde Institute is fully committed to making the research conducted under its auspices available in its open access digital collections, bilingually whenever possible, and recognizes the importance of both its educational and pragmatic role to this commitment.

Globally, the next generation of researchers are entering a research world that includes greater collaboration, open preprint servers providing access to research before peer review, and increased recognition of the importance of non-profit models of open access, open science, and open data. These are hopeful signs that we are moving towards more open and equitable scholarly communications systems. From whatever vantage points we occupy in the world as educators, researchers, and information specialists, the opportunities for critical discussions and evaluations of our current and future scholarly communications ecosystems, are potential precursors to change.

Finally, Monteverde, Costa Rica is not representative of rural communities in impoverished countries in the Global South, but because of its uniquely situated middle ground and multiple realities (rural Costa Rican community, international ecotourism destination, small North American Quaker community, scientific interest in the high elevation cloud forest, to name a few), becomes an accessible place to engage with multiple constituencies and multiple perspectives regarding global inequities in access to and production of research and scholarship.

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The opportunities for engaging with multiple perspectives in a single space has made the conversations all the more poignant.

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