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**ACCESSIBILITY AS A CRUCIAL SOCIAL JUSTICE COMPONENT OF  
OPEN ACCESS FOR LIBRARY PUBLISHERS**

A Thesis in  
Communications

by

Allyson Laird

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The thesis of Allyson Laird was reviewed and approved by the following:

Peter J. Kareithi  
Associate Professor of Communications  
Thesis Advisor

Stephanie L. Morrow  
Associate Teaching Professor of Speech Communications

Andrea L. Pritt  
Associate Librarian, University Libraries

Yonatan Tewelde  
Assistant Teaching Professor of Communication  
Professor-in-Charge, Master of Arts in Communications

## ABSTRACT

Despite their establishments as social justice-motivated movements around the same time, the Open Access and Accessibility movements have yet to be directly linked. The Open Access movement calls for content to be free of all barriers to be considered open but often accessibility requirements, which are barriers to individuals who use assistive technology, among others, are not considered when labeling something as Open Access. This study aimed to measure whether library publishers, which have traditionally been champions of both Open Access and accessibility, believe that both movements should be connected, and to what degree they feel they have administrative support for both. The study found that while most respondents felt they had both administrative and financial support for Open Access work, they did not have sufficient administrative or financial support for accessibility work. The results suggest that connecting accessibility to Open Access work through funder and other legal requirements may have a positive impact on increasing support.

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## Chapter 1

### Introduction

In the 1990s and early 2000s, two movements centered on the sharing and using of online content began just as the internet was taking off. Both movements focused on the need for anyone with an internet connection to have the ability to use and interact with the information on the web without barriers. One sought to remove barriers to scholarly research by ensuring that anyone, not just scientists or academics with access to journal subscriptions, had the ability to read and interact with information that could better society (Suber, 2012). The other focused on ensuring that anyone, regardless of their abilities or disabilities, would be able to read, interact with, or otherwise use any information on the internet, ensuring that everyone had equitable access to the world wide web (Ellcessor, 2010). These were the Open Access and Accessibility movements, respectively. Despite “growing up” together and with very similar goals, these movements have yet to formally unite, and instead are often seen as separate and distinct. However, there are many actors in the Open Access sphere that could do the work to bring the two movements together, and none are more appropriately positioned to do this work than libraries, and more specifically library publishers (McHale, 2011; Schultz & Azadbakht, 2023). To best understand how these movements overlap and why library publishers are the strongest advocates for directly connecting the two, it is necessary to dig into the history of both movements and the role of libraries within each.



## Open Access

The Open Access movement, established in the early 2000s, began with the goal of ending the inequity of access to scholarly research (Chan et al., 2002; Suber, 2012). The traditional academic journal publishing model, whereby research articles are written and submitted to a publisher and upon acceptance the author's copyright is transferred fully to the publisher, allows research in most academic disciplines to be sold through subscriptions without any monetary gain for the authors. Consequently, the publishers benefit financially by keeping the research behind subscription paywalls, limiting the access that other researchers, educators, and laypeople have to the content without any direct financial benefit to the creator of the work (Suber, 2012). The benefits of this model are largely reputation-based, with journals and publishers establishing a sense of quality over time and lending that prestige to the authors they publish. However, with subscription costs rising astronomically over time, many libraries, including university libraries, have modified or dropped subscriptions, and many are simply too expensive for institutions, let alone individuals without an academic affiliation, to afford. Without access, scientists, researchers, academics, and members of the public are prevented from reading this valuable information, distributing it, and building upon it in their own work.

Because of these barriers to access and the increasing subscription costs to academic research, in 2002 a group from the Open Society Institute (now the Open Society Foundations) who valued equal access to research for all, gathered scholarly publishers and individuals from across academia in Budapest to identify and seek ways to dismantle the inequities of scholarly publishing. The Open Society Foundations was

founded by George Soros in 1979 with the mission of searching “for bold, democratic solutions to our urgent, common challenges that advance justice, equity, and human dignity” (Open Society Foundations, Mission section, n.d.). Specifically, the group in Budapest focused on the financial and copyright barriers which directly impede individuals without the financial resources or connections to access scholarly content through subscriptions. These discussions resulted in the Budapest Open Access Initiative (BOAI) declaration, which was written by this group to declare that the internet can enable “the world-wide electronic distribution of peer-reviewed journal literature and completely free and unrestricted access to it by all scientists, scholars, teachers, students, and other curious minds” (Chan et al., 2002, para 1). The declaration goes on to further justify the need for greater access to research and cementing the pursuit of Open Access as a movement steeped in social justice. The declaration states that

Removing access barriers to this literature will accelerate research, enrich education, share the learning of the rich with the poor and the poor with the rich, make this literature as useful as it can be, and lay the foundation for uniting humanity in a common intellectual conversation and quest for knowledge. . . . permitting any users to read, download, copy, distribute, print, search, or link to the full texts of these articles, crawl them for indexing, pass them as data to software, or use them for any other lawful purpose, without financial, legal, or technical barriers other than those inseparable from gaining access to the internet itself. The only constraint on reproduction and distribution, and the only role for copyright in this domain, should be to give authors control over the integrity of their work and the right to be properly acknowledged and cited. (Chan et. al, 2002, para. 1, 3).

The following year, two additional meetings were held in the same vein, and their subsequent declarations or statements were shared in support of the newly formalized Open Access Movement. The Bethesda Statement on Open Access Publishing was held on April 11, 2003, with the formal statement released in June. During the meeting and

within the statement, academics, libraries, publishers, institutions, and scholarly societies came together to vision the future of publishing and the roles that each group should play in the growth of Open Access. Notably, this statement included the importance of libraries as places for "developing and supporting mechanisms to make the transition to open access publishing," (Brown et al., 2003, para 19). In the Berlin Declaration of Open Access to Knowledge in the Sciences and Humanities, released in October 2003, the declaration agrees with the Bethesda statement that for a work to be Open Access, the authors must grant a license that enables

all users a free, irrevocable, worldwide, right of access to, and a license to copy, use, distribute, transmit and display the work publicly and to make and distribute derivative works, in any digital medium for any responsible purpose, subject to proper attribution of authorship. (Max Planck Society, 2003, para 7).

This declaration also clearly states that freedom to access, use, and reuse research content by everyone is the ultimate goal.

Even with these three strong statements, there is still concern around whether this social justice fight truly benefits everyone, including the authors. Since the dawn of journal publishing, it has been established that researchers do not publish their work for monetary profit, but rather for an influential, impactful, and societal "profit" (Suber, 2012). At its core, Open Access as a social justice movement supports both the readers and users of research content to enhance the world's collective knowledge, allow for others to build upon it, and ultimately improve society over time. Financial and other access barriers only hinder that progress by limiting access and readership, as noted by the three Open Access declarations. In fact, traditional scholarly publishing only profits the publishers of the content, not the content creators themselves. This model has also

reinforced the idea that if scholarly content is not sold and purchased, if it is instead free, that it is cheap and not high quality. But removing financial barriers does not diminish the quality of research because the peer review process has historically been royalty-free. Peer reviewers lend their expertise to provide feedback to authors of research articles to receive employment benefits such as promotion, tenure, and reputation growth, rather than financial benefits (Suber, 2012).

When viewed through this lens, it is easy to see how Open Access serves the social justice function of fighting for greater access for anyone to content that will benefit everyone. It becomes even clearer why Open Access matters and how it can positively impact research and higher education landscapes. It challenges us to think about research as belonging to all people, and open to anyone with an interest and desire to seek it out, to “unite humanity in a common intellectual conversation and quest for knowledge,” (Chan et al., 2002, para 1). For humanity to be united intellectually, everyone must have equal opportunity for access.

The removal of access barriers for “all scientists, scholars, teachers, students, and other curious minds” is central to the mission of Open Access (Chan et al., 2002, para 1). However, the conversation and research around Open Access has primarily focused on the financial and copyright barriers to scholarly research, and not directly called out another significant barrier – that of access to digital content by individuals with disabilities.

## **Accessibility**

In the United States, the online Accessibility movement was established and grew in the early-mid 1990s, alongside the establishment of the Americans with Disabilities Act (ADA) and with the amendment of Section 508 of the Rehabilitation Act of 1973. The ADA and Section 508 protect against discrimination for people with disabilities and ensure that government programs and entities are required to provide accommodations for individuals with access needs (U.S. Department of Justice, Civil Rights Division, n.d.; General Services Administration, n.d.). The ADA was passed in July 1990 and is focused on prohibiting “discrimination against people with disabilities in everyday activities” (U.S. Department of Justice, Civil Rights Division, n.d.). It outlines regulations and requirements to protect the use and consumption of goods and services by people with disabilities. It also protects employees against discrimination due to their disabilities. Section 508 of the Rehabilitation Act of 1973 (informally called just Section 508) was revised in 1998 and specifically requires any federal agency to ensure that their electronic and information technology is accessible (General Services Administration, n.d.). This applies to both employees and members of the public for any services these government agencies provide. Together, these protections cover employment, public services by both state and private entities (including transportation), communications, and more, and help to ensure that individuals with disabilities can take part in the world around them as equal citizens and members of society.

“Accessibility” in the context of this thesis research focuses solely on digital equity of access and use for all people, regardless of ability. According to the World

Wide Web Consortium (W3C), “accessible content” is digital content "designed and developed so that people with disabilities can use it" (W3C Web Accessibility Initiative, 2024). The idea of accessible and universally usable digital content was first popularized by one of the founders of the internet, Tim Berners-Lee. He and other individuals established the World Wide Web Consortium (W3C), which “develops standards and guidelines to help everyone build a web based on the principles of accessibility, internationalization, privacy, and security” (W3C Web Accessibility Initiative, 2024). The W3C is responsible for creating and revising the Web Content Accessibility Guidelines (WCAG) which are the international standards for web accessibility. The Web Accessibility Initiative (WAI) was born from the W3C and provides supporting materials to help users understand and make their content and websites accessible (W3C, Web Accessibility Initiative, 2024). Between these two groups, they created guidelines to help digital content creators, web developers, and anyone putting content on the web make the information they share accessible to all, regardless of ability (Digital Education Strategies, The Chang School, 2019). Unlike in the Open Access movement, which defines accessibility in terms of being easy to find and read and download, accessibility as a movement means providing equal access to digital content by ensuring it is functional and usable by anyone, including those using assistive technology. Accessibility as a movement was born out of the realization that the internet cannot be a free and open space for all to participate in if the content and infrastructure placed on the internet is not equally usable and beneficial for those with disabilities (Jaeger, 2015).

Internationally, digital accessibility laws like the ADA and Section 508 have been passed by many countries, including Canada, Germany, Japan, Australia, England, Israel, Italy, India, France, Brazil, and Spain. Recently, accessibility guidelines have become even better defined thanks to the passing of the European Accessibility Act, which will require greater accessibility for public products and services in Europe, and the revision of Title II of the ADA, which better defines the accessibility requirements for web content published by entities that receive government funding (European Commission, n.d.; U.S. Department of Justice, Civil Rights Division, n.d.).

Even without these new and revised laws, many advocates have worked hard over the years to ensure that the web continues to be a more open and inclusive place for everyone, not just for public entities for whom these laws are legally applicable. As technology has continued to change and develop over time, and the world has become increasingly digital, the accessibility movement has continued to draw champions for the effort to bring full equality of access to content, services, and information on the web. Web developers, non-profit advocates, educators, researchers, and librarians, whether allies or disabled themselves, have all stepped forward to promote a more accessible and equitable digital world (Kelly et. al., 2009; Ellcessor, 2010; Jaeger, 2015; Maron et. al., 2019; Coverdale, et. al., 2024).

### **The Role of Libraries**

The Open Access and the accessibility movements are both social justice movements seeking fairness, equity, and inclusion for all, regardless of socio-economic

status or ability. One movement is calling for the open availability of research and scholarly content for anyone, primarily by removing financial and most copyright barriers (Suber, 2012). The other seeks to “achieve true equity of access and usage in the online environment” regardless of one’s ability by removing technical, visual, and other accessibility barriers (Jaeger, 2015, para 8). However, there is often a lack of overt connection with the Open Access movement and digital accessibility. Very little research about the Open Access movement discusses the need to make work accessible for it to be considered open access. Those works that do hint at that belief typically only center around the need to make educational resources openly available for students (Schultz and Azadbakht, 2023; Johnson and Abumeeiz, 2023). When the research does consider furthering and improving accessibility initiatives, it is often noted as a good thing to strive for, or a worthy ideal to pursue, rather than a requirement alongside making work financially free and liberated from copyright barriers. This disconnect seems surprising since all the declarations clearly state that equity of access by everyone, including individuals with varying levels of ability, is the goal.

For example, *Open and Equitable Scholarly Communications*, published by the American Library Association, describes at length the challenges “publishers in and beyond libraries” face when it comes to making content accessible and offers some resources that may help (Maron et. al., 2019, pp. 28). However, this and most other research that references both open access and accessibility does not go far enough to acknowledge that complete openness cannot be achieved without ensuring that the content and infrastructure it is published on is accessible. The unfortunate reality that



accessibility is not aligned more explicitly within the Open Access movement is concerning, considering the BOAI declaration's call for "all" people to have access to research and for "uniting humanity in a common intellectual conversation and quest for knowledge," which would include people who use assistive technology (Chan et. al, 2002, para. 1).

Accessibility must become a crucial social justice component of Open Access, and to do this there must inevitably be a dedicated leader willing to push this initiative forward. Academic libraries are well-positioned to take the lead on this, especially due to their longstanding commitment to ensuring equitable access to information, including by providing accessible content (McHale, 2011). Furthermore, libraries, especially academic libraries, have moved into the role of publisher, not just content provider. In the early 2000s, research was published about the role of libraries in scholarly communications, including their advocacy of digital publishing alternatives, publishing support they provide, and collaborations with their university presses (Neal, 2001; Watson et al, 2003). In 2023, the Library Publishing Coalition, the leading membership coalition of libraries providing publishing services, had 159 institutions from around the world listed in its annual directory, though this list may not be exhaustive (Library Publishing Coalition Directory Committee, 2023). Many institutions across North America and internationally have established library publishing programs and publish Open Access content. Libraries' strong ethical values around access, creation, and dissemination of scholarly content place them in a prime position to support accessibility within the Open Access movement.

While it's true that many academic library publishing programs agree that accessibility is important and potentially necessary to fully achieve Open Access, barriers exist for making the work they publish accessible. Making digital content accessible, especially when it was not accessible to begin with, can be time consuming and purchasing tools to do this work can be expensive. Learning how to create digital content from the beginning takes time and financial support for training and education. To do this work takes passion and commitment, which is why accessibility is often hard to achieve. To help determine what academic library publishers believe is holding them back from explicitly describing accessibility as a required component of Open Access, this thesis focuses on surveying primarily the U.S.-based library publishing community.

Library publishers often publish Open Access content and libraries have historically been committed to making content accessible to as many people as possible, including by ensuring digital accessibility to content, so the library publishing community stands out as the ideal demographic of the academic publishing community for this study to focus on (Maron et. al., 2019). Measuring how library publishers view and value accessibility in conjunction with Open Access will be a crucial baseline, as no previous studies have targeted the work of solely library publishers in this way. Assessments have been conducted to identify the barriers to implementing accessibility work, but none explicitly labels accessibility as vital to Open Access. (Maron et. al., 2019).

This thesis aims to discover the percentage of library publishers who agree that accessibility is integral to achieving Open Access, those who disagree, and what barriers, perceived or actual, exist that keep these publishers from pursuing accessibility alongside

their Open Access publishing efforts. Rather than continuing to focus on barriers, it is more beneficial to examine what changes are necessary in the ways we talk about Open Access in relation to accessibility, and what academic library leaders can do to ensure that change happens. The perceived changes needed may be quite different from the actual changes necessary for progress to occur, and that information will be quite valuable in aligning and moving both movements forward.

## Chapter 2

### **Values-Based University Publishing: Library Publishers**

Around the same time as the inception of the Open Access movement and the accessibility movements, academic libraries were beginning to dip their toes into the world of publishing and supporting new and innovative publishing models (Neal, 2001; Xia, 2009). While this was surprising to some, it is important to remember that libraries are, at their core, institutions with a mission to provide access to information to the public (Conrad, 2017). What is publishing if not a service that ensures vetted research and information is provided openly to anyone that inquires? Publishing was still very new territory for libraries in those early days of the Open Access and accessibility movements and has evolved since the early 1990s, but many factors spurred academic libraries toward providing publishing services. The factors included increasing subscription costs for academic journals, the transition from print journals to fully online publications, the Open Access movement's call for scholarly research to be made openly available and not contributing to high publisher profits, and the commitment of academic libraries to serve their communities and make content accessible to as many individuals as possible (Neal, 2001; Hahn, 2007).

From the early to the late 2000s, the involvement of libraries in scholarly communications and publishing grew rapidly, as detailed by the Association of Research Libraries (ARL), a nonprofit membership organization of research libraries and entities that collect and distribute academic information. A survey of ARL's 80 members showed

that 65% of them reported the pursuit and development of scholarly publishing services by 2007 (Hahn, 2008). By the early 2010s, it was clear that this was a priority for many academic libraries, and the need for a shared community to support the work of library publishers was expressed. In December 2014, after almost two years of dedicated work, the Library Publishing Coalition (LPC) was established by 61 academic libraries and the Educopia Institute, a nonprofit community-building organization (Library Publishing Coalition, History section, n.d.a.). Libraries that had been engaging in support for the creation and dissemination of original scholarly work now had a community to work within, similar to communities like the Association of University Presses. For the first time, libraries engaged in scholarly publishing could learn from one another, establish best practices, and advocate for their needs in the broader scholarly communications landscape.

Historically, there has been the question about the place that academic libraries should hold within the scholarly publishing ecosystem, especially when an institution already has a university press. This topic has been widely discussed and conversations are still ongoing, but the main reasons remain tied to the values of libraries. Many of North America's university presses were established by librarians or within academic libraries, illustrating the library's place within scholarly publishing's history (Little, 2017). In the last two and a half decades, universities have been partnering with and complementing their university presses in a variety of ways, largely due to the shared stake that both have in the future of scholarly publishing (Eaton et. al, 2004; Clement, 2011; Little, 2017). The changes in the academic publishing landscape of the late 1990s and early 2000s

spurred their momentum, as digital publishing grew exponentially, and budgets became tight for many presses (Nardini, 2014). Libraries became more actively involved in supporting scholarly publishing since they had the ability to be more agile and innovative than university presses, as early adopters of new digital infrastructure (Eaton et. al, 2004). The ability for libraries to support digital scholarship that traditional presses could not, alongside their beliefs and values for making scholarship Open Access and widely available to the public fueled the creation of library publishing programs, and those reasons are encapsulated in the values of the Library Publishing Coalition.

The values of the LPC are professionalism, openness, diversity, collaboration, and innovation (Library Publishing Coalition, About Us, n.d.a.). The Library Publishing Coalition has published various resources which are built on these values and seek to guide library publishing professionals toward what services and values they should emulate in their programs. The focus on openness, diversity, and innovation has especially allowed library publishers to look for ways to build inclusive practices into their work.

The Library Publishing Competencies document details the information that library publishing practitioners should know to manage an informed and well-rounded library publishing program. The competencies include technical and workflow knowledge about publishing platforms, production workflows and services, retractions, content discovery, preservation services, and metrics. They also cover publishing program development and management, knowledge of copyright and open access licensing, permissions, and privacy. Finally, they encourage an understanding of

diversity, equity, and inclusion, and accessibility in library publishing (Library Publishing Coalition Professional Development Committee, 2020). The inclusion of accessibility alongside open access licensing is further proof of the value that the field of library publishing places on publishing accessible content. It also illustrates the fact that accessibility and open access are still seen as distinct elements, rather than two pieces of the same movement.

Another resource, the Ethical Framework for Library Publishing (later called Framework), begins by noting that library publishing is values-based and encourages practitioners to examine the values that govern their individual university, library, and program, as well as the values that are shared within the greater library publishing field (Library Publishing Coalition Ethical Framework Task Force, 2023). Reviewing the values of each stakeholder encourages library publishers to see where their work is aligned with the values of the greater landscape in which they operate. Furthermore, the Framework declares that library publishers are uniquely positioned to identify areas of change in scholarly communication and enact those changes to advance the field of publishing in those directions. The Framework proposes that library publishers “have an ethical responsibility to imagine the world they would like to operate in and take steps in their publishing practices to build that world” (Library Publishing Coalition Ethical Framework Task Force, 2023, Statement 2.3). It is through this lens that library publishers are seen as the best place for accessibility practices to be identified and adopted within the definition of Open Access. Doing so would ensure that all open

content that is published is also accessible to users with disabilities and/or users of assistive technology.

The Library Publishing Coalition's 2020 Research Agenda outlines areas for additional research in the field of library publishing, and astutely asks the community to consider "what barriers exist and what incentives could be put in place to move the accessibility conversation from compliance-focus to access for all?" (Library Publishing Coalition Research Committee, 2020). That is exactly the question that this thesis research will examine, while pondering whether connecting the Open Access and accessibility movements is the incentive needed.



### Chapter 3

#### Literature Review

Research on the Open Access and accessibility movements are often steeped in a social justice perspective, primarily focused on the removal of barriers to access and the inequities these barriers create. Open Access has traditionally focused on removing copyright and financial barriers, while the accessibility movement focuses on removing barriers for individuals with disabilities and/or users of assistive technologies. Both movements have a strong social justice perspective and are striving for equity of access to digital content so that everyone can read and contribute to any online scholarly conversation, but there is not much research into Open Access and accessibility as connected movements. The popular definitions of Open Access still do not explicitly note that the scholarly works must be usable for individuals with disabilities and those that use assistive technologies (UNESCO, n.d.; SPARC, n.d.). This lack of consideration for a large portion of the world's community in the Open Access movement provides an opportunity for applying theory to this area, especially theories that center social justice and can be applied with equal importance in both spaces. The theorist John Rawls explores how society should work to remove inequities in his justice as fairness theory (Rawls, 2001). In the first of his two principles of justice, Rawls states that "each person has the same infeasible claim to a fully adequate scheme of equal basic liberties," and his second principle describes how social and economic inequalities should only exist if an office or position in society is open to anyone with equal opportunity, and any

inequalities should benefit people who are least-advantaged in society (2001, p. 42). In other words, Rawls theory calls societies to assume that everyone is born with the same right to equal liberties and access, both socially and economically, regardless of their situation, including their abilities or disabilities. It also calls for ensuring an equitable distribution of goods and access to members of society, or even distribution of goods that are not equal if they benefit those with the least amount of access. Expanding this theory to Open Access and accessibility, one can imagine digital content as the goods within society which are being held back from a very disadvantaged portion of society - those unable to read, use, and learn from digital content that is not accessible. Before applying Rawls theory directly and discussing the theory of justice as fairness in the Open Access and accessibility movements, it is important to understand the current landscape of Open Access and accessibility research, respectively.

### **Open Access and Equity in Research**

Much of the research on the Open Access movement has described the social justice implications of the financial and copyright barriers to access for scholarly research, and the need to remove those barriers. Peter Suber's fundamental book *Open Access* (2012) has laid a great foundation. In it, he provides an overview of what he calls "the BBB definition of OA," which is the definition compiled from the Budapest Open Access Initiative (BOAI), the Bethesda Statement on Open Access Publishing, and the Berlin Declaration on Open Access to Knowledge in the Sciences and Humanities (p. 7). These three meetings and their associated public statements serve as the foundation of the

Open Access movement. As noted previously, these statements call for not just the removal of price barriers to scholarly content, but also for the removal of most copyright and permissions barriers to allow for unrestricted access and reuse of the content for all people (Chan et. al, 2002; Brown, et. al., 2003; Max Planck Society, 2003). Even though the call for social justice and access for all is directly stated, clarification that digital access barriers must also be removed for those who use assistive technologies is absent.

Financial barriers and their social justice implications are further discussed in much of the research on the Open Access movement. At the center are the economic concerns surrounding the dominance of “the Big 5” commercial publishers: Elsevier, Taylor & Francis, Wiley, Springer, and SAGE (Mattaini, 2004; Shu & Larivière, 2024). Their extremely high profit margins (sometimes as high as 40% annually), the rise in subscription journal costs, and strained library budgets, are all factors that play a huge part in limiting access to academic research, both in the U.S. and abroad. These factors provide evidence for why publishing Open Access is desirable, and in many cases, necessary from a social justice standpoint (Mattaini, 2004; Shu & Larivière, 2024). In addition to library budget cuts, newer Open Access models created by these publishers to address the budget constraints have added to the barriers for making scholarly content Open. Article Processing Charges (APCs), where the author must pay a fee to make their work openly available, also creates a barrier to publishing research, especially for authors with limited access to financial support from their university or institution (Bullock, 2019; Frank, Foster, & Pagliari, 2023).

Not only do these financial barriers cause inequities in access, but they also cause inequities in contributions to research. In 2013, researchers conducted a review of

economics articles in top-tier journals and found that less than two percent of them were about a country other than the U.S. (Roh et. al., 2020). Similarly, a study of top-ranking mental health journals in 2019 revealed that over 90% of the articles were written by authors from high income countries, and just over two percent were authored by individuals from a low- and middle-income countries (El Khoury et. al., 2021) Opening up access to research not only means increasing access to the final product, but also working to ensure that more diverse voices are able to contribute to the scholarly discussion. Advocates of the Open Access movement not only focus on the financial barriers to access, but to challenge the barriers of participation in the global scholarly discussion for those outside the Global North. Specifically, there are barriers to participating in the production and dissemination of research, when an outside researcher investigates a challenge in a small, local community, but those research results end up behind a paywall instead of in the hands of those community members (Raju and Badrudeen, 2022, p. 51). If only one kind of voice and perspective is dominating the scholarly conversation, it does not serve diverse, local communities, nor does it truly strengthen research in that area.

While these barriers are important to recognize and remove, none of this published literature identifies accessibility as a significant barrier to access. Instead, this type of accessibility is treated as a separate issue. To fulfill the BOAI's call for "unrestricted access by all...curious minds" and for "uniting humanity in a common intellectual conversation and quest for knowledge," the argument should be made that digital accessibility must be included in the pursuit of Open Access (Chan et al., 2002, para. 1).

## **Accessibility and Social Justice**

The reality for individuals that are disabled and/or use assistive technologies is that they rely heavily on websites and documents to be set up appropriately so they may interact with people and content online (Jaeger, 2015). Nearly every part of society has an online component, so if someone wants to search for, and keep a job, enroll in a class, file taxes, or do any number of daily tasks, one must use the internet (Ellcessor, 2009; Jaeger, 2015). If the internet is inaccessible, as it is for so many individuals, then there is no equity of ability to participate in society, let alone participate a scholarly research discussion (Ellcessor, 2009; Jaeger, 2015). An “inaccessible internet” means more than just someone without access to an internet connection, though that is a major concern for many in society. Even with an internet connection at home, or access to the internet through a public service like a library, there are still barriers when websites are not structured with assistive technology and those with disabilities in mind. If a site or piece of digital content is not created so that a screen reader can read out and navigate the text, or so keyboard shortcuts can be used to tab down through a webpage or a webform, these sites and services are unable to be used by many in society (Jaeger, 2015).

The goal of the accessibility movement then is to remove these barriers and change how our society creates and shares these services so they can be available, and usable (truly accessible) to all (Rowland, 2023). Accessibility for all means not just enforcing accessibility laws, such as Section 508 and the ADA, but also “finding the language to connect concerns of online equality to groups beyond people with disabilities

and to change perceptions about the importance of accessibility” (Jaeger, 2015, para. 8). The argument here is that laws can be great for compliance, but to open people’s minds and move toward an accessible-first mindset when creating and sharing digital content, the narrative must change toward access for all from the start.

Accessibility advocates have been working for years to reimagine online accessibility so that the tools and platforms everyone uses everyday are designed with accessibility needs in mind from the start. The current approaches to accessibility, which largely lie in remediation and after-the-fact workarounds to make sites meet accessibility requirements, are not as effective or useful to all users as they could be (Kelly et al., 2009; Rowland, 2023). These advocates call for a revisioning of web content creation, where content should be created with the user in mind and how a user might want to interact with digital content, allowing for the broadest use of digital content, regardless of what accessibility tools are needed. They assert that if we create content that is flexible, adaptable, and accessible, then everyone benefits, and change can truly take place (Kelly et al., 2009; Rosen, 2018).

Historically, libraries have served not only as a point of access for content, but also as partners and advocates striving to make content accessible for all users (McHale, 2011; Rowland, 2023). Coupled with the idea that publishers look to find the widest readership possible for the content they publish, it stands to reason that library publishers are the best group to move toward an accessible-first publishing model (Rosen, 2019). Furthermore, the legal requirements many institutions must adhere to (Section 504 and the ADA), provide a final reason why library publishers are poised to make it their mission to ensure that their Open Access content is also accessible. Non-compliance

could mean legal action and being sued. The legal requirements are also growing more stringent with the recent passing of the revision of Title II of the Americans with Disabilities Act, which further clarifies what content must meet WCAG accessibility guidelines (U. S. Department of Justice, Civil Rights Division, n.d.). This intersection of accessibility advocacy and requirements for accessibility compliance could make library publishers a catalyst for bringing accessibility more directly into Open Access.

Connecting the people across both movements and shifting the lens of the Open Access movement to include Accessibility would be a major step toward achieving equity in digital academic publishing.

### **Justice as Fairness and Distributive Justice in Open Access and Accessibility**

After reviewing the social justice implications in Open Access and accessibility literature, a foundation has been laid to explore the application of Rawls' theories of justice as fairness and distributive justice.

The theory of distributive justice is defined in part by the idea that no person should inherently have greater status or opportunity in society solely because of what family they were born into, what race or gender they are, or any other factor that may provide status in society (Rawls, 2001). Instead, this theory declares that all people are inherently born the same and have no greater inherent claim on access to goods or opportunities in society than others. Rawls' theory of distributive justice lays the groundwork for the two main principles of the theory of justice as fairness. The first principle is that every person has the same inalienable claim to basic equal liberties in

society. The second principle concerns inequalities in society and is twofold. First, it states that if there are inequities in society, it should happen even though all people have equal access to education and economic opportunities, regardless of the socio-economic status they are born into. Second, it states that any inequalities in society should be for the benefit of those worse-off, or the poorest or disadvantaged (Rawls, 2001).

Through this lens, it is easy to see how advocating for open and accessible scholarly content meets the principles of justice as fairness. Scholarly content is important to every individual's place in society and in education and should be both as usable for the most disadvantaged individuals in society (those with disabilities or who use assistive technology, for example) and as openly available as possible (i.e. no financial or copyright/use or reuse barriers) to anyone in society. The theories of distributive justice and justice as fairness are applied in specific fields of study, such as criminal justice scholarship. Scherlen and Robinson (2008) apply distributive justice theory in their discussion of how the lack of open access to criminal justice scholarship and publishing within the traditional journal publishing model is not in line with the field's social justice efforts. They argue for "providing open access to as much scholarly communication as possible, not only because it is the best means of disseminating the knowledge of a discipline and advancing research but also because it benefits the public good" (Scherlen & Robinson, 2008, pp 61). While this is true, to truly provide the most public good, the Open Access movement must take a step further and connect directly with the Accessibility movement. This would ensure that those with the least opportunity for full access to scholarly research are given equal access to read, download, and interact with accessible content. The literature has shown that library publishers are poised to be



the ones to bring the movements forward and together. What remains is to determine what barriers exist that are stopping them from achieving that goal.

## **Chapter 4**

### **Methodology**

#### **Research Goals**

The goal of this thesis research has been to determine to what degree library publishers, who often focus on social justice in their work, agree or disagree that accessibility is a crucial social justice component of the Open Access movement and to what extent it belongs as a service of their publishing program. It also attempts to determine whether they believe they have the administrative resources necessary to make the scholarship they publish both Open Access and accessible, and if not, why not and what might change that. To help answer these questions, a digital survey was distributed among library publishing practitioners via the Library Publishing Coalition's library publishing membership email list. As the premier listserv for library publishers, this was the most direct way to collect responses from members of the library publishing community.

It is important to measure a sample of the library publishing community to see where these movements intersect or diverge in practice within a community that is supportive of both movements. These responses will help reveal what work must be done to advance and bring together these movements, and where that work will be most effective. Once a baseline is established with this community, the work could expand to

include other scholarly publishing communities, such as University Press publishers, society publishers, etc.

A complication of measuring the value that library publishers place on accessibility and Open Access is the very real disconnect that may exist between what they believe and what they are able to do in practice. Due to the amount of work and resources it takes to make digital content accessible, library publishers may not have identified the best way forward at this time. The survey developed and utilized in this study was designed to help determine what level of support, both financial and administrative (or non-financial), library publishers feel they are provided for both Open Access and accessibility work by their program administrators. The research goals, consent statement, and survey tool were reviewed and approved by Penn State University's Institutional Review Board.

### **Survey Format**

The online survey was created and distributed in Microsoft Forms and consisted of 19 questions. These questions aimed to determine both the beliefs the respondents hold about accessibility and open access (whether they are equally important and should be closely connected), and how they perceived their administrators and/or budget managers financially value (or not) accessibility and open access respectively. The survey also aimed to determine how much library publishers believe financial or other administrative barriers affect their ability to incorporate accessibility into their library publishing programs.

The survey was designed with library publishers in mind and was distributed to the Library Publishing Coalition's listserv, a professional listserv of library publishers from the United States and Canada, though a few members from Malaysia and Switzerland are members as well. Participants were asked to self-select their participation in the study and proceed with the survey if they could respond affirmatively to the first question, which defined library publishers using the Library Publishing Coalition's (LPC) definition as

The set of activities led by academic and research libraries and library consortia to support the creation, dissemination, and curation of scholarly, creative, and/or educational works. Generally, library publishing requires a production process, presents original work not previously made available, and applies a level of certification to the content published, whether through peer review or extension of the institutional brand. Based on core library values, and building on the traditional skills of librarians, it is distinguished from other publishing fields by a preference for Open Access dissemination as well as a willingness to embrace informal and experimental forms of scholarly communication and to challenge the status quo. (Library Publishing Coalition, What is Library Publishing? Section, n.d.b.).

If participants agreed that their publishing program's practices were in line with that definition, they could proceed with the remaining 18 questions of the survey.

The questions were organized into four main sections: 1) assessing respondents' personal definitions of open access and accessibility; 2) whether they provide accessibility support for the publications in their program; 3) what level of support their institution or administrators provide to support Open Access and accessibility work; and 4) what changes respondents believe are necessary to encourage administrators to provide (more) support for accessibility work. The final questions of the survey collected some demographic information to determine what type of library the publishing program

belonged to and where it was located. The size and location of the library publishing program could certainly influence the results of the survey.

At the beginning of the survey, prior to the first question, definitions of “open access” and “accessibility” are provided to help limit ambiguity around these terms. Accessibility was defined according to the World Wide Web Consortium (W3C)’s Web Accessibility Initiative (WAI) group as digital content which is “designed and developed so that people with disabilities can use them” (W3C Web Accessibility Initiative, 2024, What is Web Accessibility section). It means creating published materials (PDFs, HTML pages, EPUB, websites, etc.) that conform to Web Content Accessibility Guidelines (WCAG). "Accessibility" in this context does not refer to the ability for someone to find or get ahold of content that may be otherwise difficult to access. Open access was defined as the free, immediate availability of scholarship, typically online, combined with the removal of barriers (legal/copyright or otherwise) for use and reuse. The principles of open access were described in the Budapest Open Access Initiative (BOAI) as:

the world-wide electronic distribution of peer-reviewed journal literature and completely free and unrestricted access to it by all scientists, scholars, teachers, students, and other curious minds’ which works to ‘accelerate research, enrich education, share the learning of the rich with the poor and the poor with the rich, make this literature as useful as it can be, and lay the foundation for uniting humanity in a common intellectual conversation and quest for knowledge. (Chan et. al, 2002).

Respondents were asked to keep these definitions in mind as they answered questions 2-4 which asked if they published open access content, what elements made up the definition of open access as they understand it, and whether they provide accessibility support for publications in their programs.

Questions 5-10 ask specific questions about accessibility, including the kinds (if any) of accessibility support each library publisher provides to their users, and what resources they believe are necessary to provide these services. They are also asked to share whether they believe their administration is supportive of accessibility in principle, and if they feel they have financial or administrative (meaning non-financial) support from their library leaders to provide these services.

Questions 11-13 ask if respondents feel their administration is supportive of open access, both in principle and financially, before asking if they believe their library leaders are as supportive of accessibility as they are of open access. These questions sought to help provide a baseline understanding, within the library publishing community, of how well library publishers perceive their administrations' understanding and support for open access and accessibility.

Question 14 asks directly about the April 2024 ruling by the Department of Justice to expand and more fully define Title II of the Americans with Disabilities Act. For many government-funded institutions, this new ruling will more fully define the accessibility requirements for all the content they place on their websites. This question is intended to help determine to what degree that new ruling has affected library publishers' accessibility work, if at all.

Question 15 asks if library publishers believe that they would receive more support for accessibility services if the definition for open access was revised to include "accessible" as one of the key requirements. Question 16 allows for some final thoughts to be shared about what administrators might need to provide more financial and administrative support for accessibility.

Questions 17-19 of the survey ask for the country the respondent's library publishing program is located and what type of institution the library publishing respondent is from (R1, R2, R3 for U.S. schools, or research university, primarily undergraduate university, and comprehensive university for Canadian schools, or a library consortium) (Carnegie Classification, n.d.; SI-Canada, n.d.). The final question allows for any additional comments to be shared before concluding the survey.

The survey was sent to the Library Publishing Coalition's (LPC) listserv on August 22, 2024, and was available for 16 days. During this time, one of the recipients of the email in the Library Publishing listserv forwarded the survey to the International Federation of Library Associations (IFLA) listserv for their Library Publishing special interest group. This list contains many more international library publishers, but certainly much overlap exists with the LPC list. This list was not initially targeted because many international publishers do not define their programs using the LPC's definition of library publishing, which was a requirement for filling out this survey.

### **Planned Analysis**

The results will be analyzed using the analytics provided within the Microsoft Forms platform, within the exported Excel file, and further analyzed and wrangled using R, depending on how large or complex the data set turns out to be. Questions 16 and 19, which are open text fields, will be analyzed via content analysis to identify themes within the responses and provide insights based off those themes.

The goal of this survey is to move beyond previous studies that only ask library publishers “what barriers do you face in implementing accessibility work?” separate from their open access work. Instead, this survey intends to move toward determining if there is collective agreement that accessibility is crucial to and part of open access publishing. If there is collective agreement, this study also aims to shed light on the next phase, which is determining what needs to be done to overcome those barriers and ensure that scholarly content is accessible as well as freely and openly available before it can be truly labeled open access.

A full copy of the survey is available in the Appendix.



## Chapter 5

### Results

There were 26 responses to the survey, but one respondent indicated that they did not believe they were a library publisher based on the first question, which asked respondents to confirm that they were a library publisher as defined by the LPC's library publishing definition. Because of this, only 25 responses were considered valid.

Of those 25 respondents, 21 noted they were from the USA, leaving one respondent each from The Netherlands, the UK, and Ireland. One respondent chose not to share their country. Because most of the respondents were from the United States and the few that were from other countries had no more than one respondent per country, the non-U.S. responses have been removed from the general analysis as well. This decision was made so that the results could be more generalizable for the U.S. library publisher context. The international results will be shared briefly at the end of this chapter for comparison to the U.S. data set in the analysis.

There were 21 responses from the U.S. that were analyzed in this study, and 17 of those identified themselves as being from R1 institutions, two identified as being from R2 institutions, one from a library consortium, one from a doctoral/professional university. (see Table 6-1).

Table 6-1: Type of institution represented by respondents of the survey.

Type of Institution	Number of Respondents
R1	17
R2	2
Library Consortium	1
Doctoral/Professional University	1

All respondents chose “No cost barrier to read/access” when answering question 3 which asked them to choose the qualities they believed were required for Open Access (see Figure 6-1). Three respondents only chose that answer and did not select any other options. Ten of the respondents also chose “no cost barrier to publish.”. Only one respondent selected no cost to read/access and no cost for publication (APCs) in the options given for the definition of Open Access. In total, 15 respondents also chose “no” and/or “limited copyright or legal barrier” as important in the definition. Only 2 respondents chose just the options for “no financial barrier to read/use” and “no” or “reduced copyright or legal barriers,” when defining Open Access. One of the respondents chose “other” in this category, writing that they felt there should be no copyright or legal barrier *for at least some forms of use/reuse*, rather than all forms of use/reuse. This answer identified a misaligned definition between the “no” and “reduced” copyright and legal barriers options, which is further discussed in Chapter 7. Fifteen of the 21 respondents also chose “no” and/or “limited accessibility barriers,” in their answer to Question 3. Only 5 of those respondents indicated limited accessibility barriers, rather than no accessibility barriers, and one respondent chose both answers. Also of note is that

one respondent indicated just “no cost barrier to read/access” and “limited accessibility barriers,” in their answer, not mentioning copyright or legal barriers at all. Finally, the last “other” answer submitted was to clarify that the respondent’s answer was what they believed *should* happen in Open Access publishing, not what they think *does* happen right now.

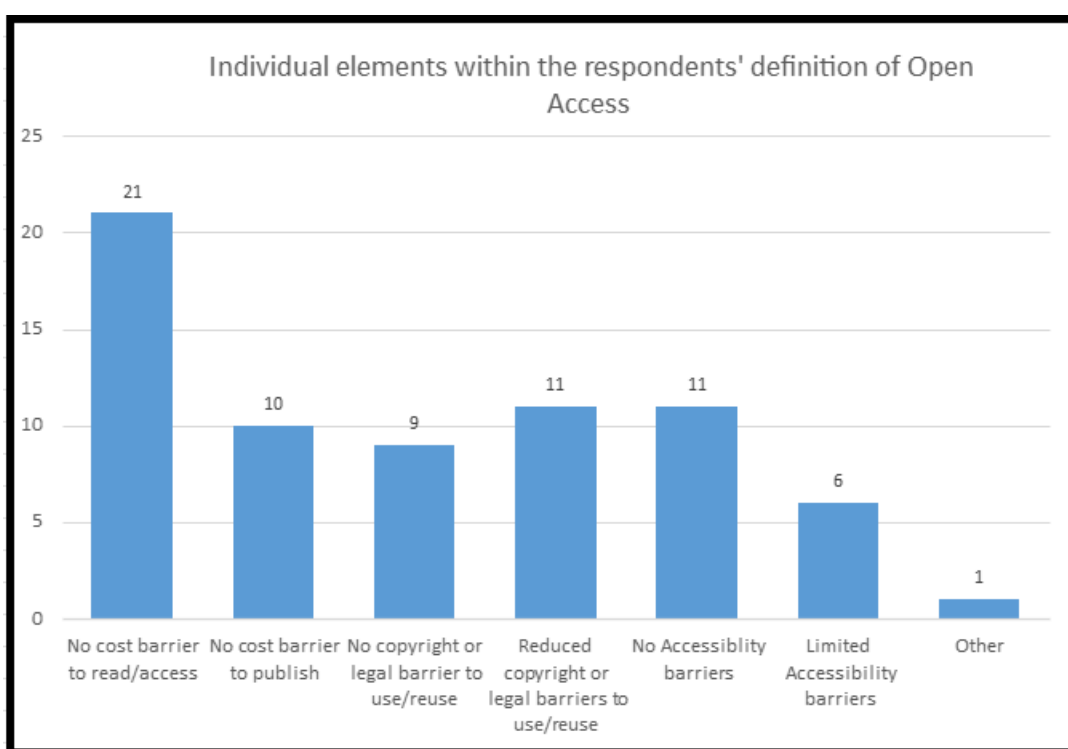


Figure 6-1: Question 3 responses detailing the individual elements respondents chose to define Open Access.

When asked if the respondents already provided accessibility support for the content they host or publish, 16 of the respondents responded yes. Four responded no, and one responded that they were not sure.

Question 5 had respondents answer more specifically about their accessibility work, and asked what accessibility support each respondent's program provides. "Accessibility guides or FAQs" and "website accessibility" got the most responses, with 10 and nine responses respectively. "PDF remediation" and "Accessibility training" both received 9 responses, and "accessible templates for editors" received 6 responses. Four respondents gave "other" answers, two of which included providing instructions about alternative text and accessibility assessments. One respondent shared that they have funding to hire and train students to write alternative text and are working to implement accessibility features in one of their publishing platforms called Pressbooks<sup>1</sup>, including a pilot project to convert non-accessible LaTeX content into EPUB and HTML formats. Another respondent shared that their accessibility work is dependent on the staff and student employee capacity, except for their web content support.

Following this question, respondents were asked about other accessibility support they provide in their publishing program. Five of the 21 respondents answered, two shared that their institution has an accessibility team either within their library or across campus, providing either direct accessibility support or helping to educate and advocate for funding to hire individuals to do accessibility work. A third shared that they do PDF remediation on a case-by-case basis and do not have their own accessibility guides, but often refer to guides created by others. Another response shared that an open education initiative at their institution is focusing on accessibility in STEM, particularly for math

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<sup>1</sup> Pressbooks is a digital publishing platform for Open Educational Materials. See <https://pressbooks.com/>

courses. The final response noted that they have high accessibility requirements for the platforms they use.

The survey then asked what resources each respondent believes are necessary to do accessibility work, regardless of whether they provide those services. Twenty respondents chose “Training in Accessibility (for library publishing staff),” 19 chose “Funding for technology (such as Adobe Acrobat, InDesign, PDF remediation software like AxesPDF, CommonLook, etc.),” and 20 chose “Funding for personnel (to do the Accessibility work or provide Accessibility support).” Two people provided “other” responses, which were “Time/capacity to do robust Accessibility support,” from a respondent at an R1 university, and “Direction from leadership (i.e., choosing where to prioritize accessibility over other areas of work),” from a respondent at a doctoral/professional university.

The next two questions focused on respondents’ feelings about their administration’s support for accessibility work, both in principle and financially. There were 19 “yes” answers for administrators’ support, one said “no,” and one responded with “I’m not sure.” Financially, only seven responded that they believe they have financial support, while 12 said “no,” and one said, “I’m not sure.”

The survey then asked how respondents feel about administrative support for pursuing and providing accessibility services, through allocating time for accessibility training, funds for professional development opportunities such as attending conferences, accessibility work built into job descriptions, etc. Fourteen of the respondents said “yes,” they feel this support, five said, “no” and two said, “I’m not sure.”

To compare accessibility support with Open Access support, Question 11 asked about administrative support for Open Access by first asking about how administrators feel in principle, followed by financial support. Twenty respondents said “yes,” they believe their administration is supportive of Open Access, and one said, “I’m not sure.” In the following question, 19 respondents said “yes” they have financial support for Open Access work, one said “no,” and one said, “I’m not sure.” To compare, the next question asked if respondents believe their administration is as supportive of accessibility as they are Open Access. Eleven of the respondents indicated that their administration supports Open Access more than accessibility, seven respondents said that they support both equally, and two respondents said that their administration supports accessibility work more than Open Access. No one responded that neither Open Access nor accessibility were supported by their administration, and one respondent left this question blank (see Figure 6-2).

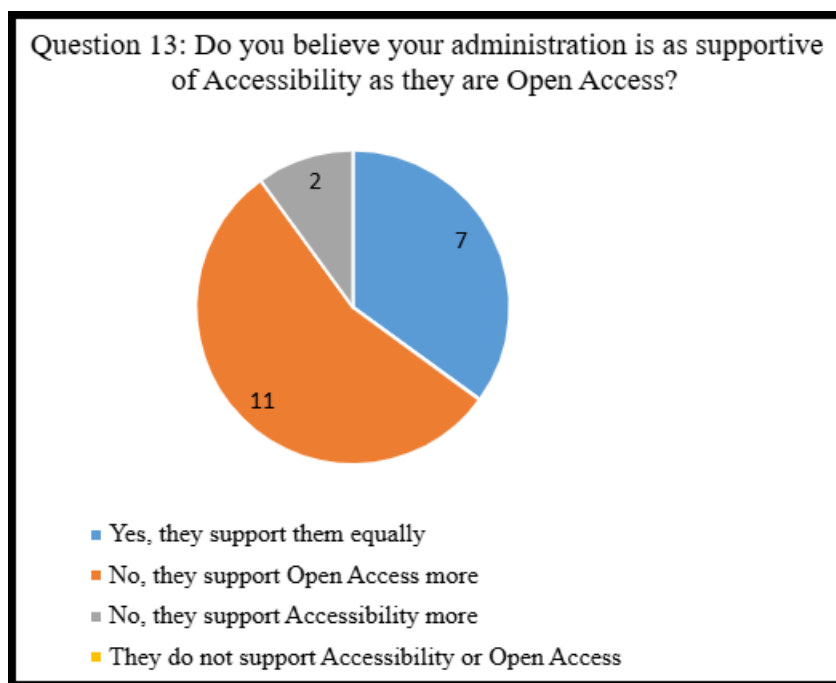


Figure 6-2: Question 13 results from the survey, asking about differences in administrative support between Open Access and accessibility.

The next question asked respondents to share whether the April 2024 ruling by the Department of Justice, which clarified and expanded accessibility requirements in Title II for government-funded institutions has influenced their library administrator's support for accessibility. Eight respondents chose "no," five of which are R1's. Five respondents, all from R1 institutions, said that "yes," the ruling has had an impact. The remaining seven respondents chose "I'm not sure," and are all from R1 institutions. One respondent chose not to answer this question.

To see how respondents feel about the connection between Open Access and accessibility, question 15 asked if a change in definition to Open Access, linking it more closely with accessibility criteria, would have an impact on the financial and administrative support for accessibility work. Seven of the respondents said that "yes," a

change in definition in this way would have a positive impact. The three respondents who said “no,” a definition change will not help, were from R1 or a doctoral/professional university. The remaining ten respondents chose “I don’t know,” and all of them were from R1 institutions in the U.S. One respondent chose not to answer this question.

To capture other ideas respondents may have for how to advance accessibility support, they were asked to share if there was anything other than a change to the definition of Open Access that would encourage further financial and administrative support from their administration. Eighteen respondents chose to answer, and the responses fell into eight categories (see Table 6-2). The five most common suggestions were activism from the university community (students, faculty, staff); high-level university/institutional leadership and legal teams demanding greater accessibility support; if accessibility were linked with prestige, trendiness, or impact for library publishing programs; real world examples and a connection to why accessibility is important beyond simply technical compliance; and legal action (i.e., being sued). Each of these categories had 4 respondents discussing these topics. There were three responses that suggested greater funder mandates and legal requirements for compliance. Two respondents suggested that budget considerations could increase accessibility work, either by having a greater budget or by amplifying the fact that born-accessible content will be a cost savings in the long run. The final category had one response, and it was a suggestion that increased awareness about library publishing programs and the content they publish may help increase support.



Table 6-2: Responses from Question 16, asking respondents to share their suggestions for greater administrative and financial support for accessibility.

<b>Suggestions for greater financial and administrative support for accessibility</b>	<b>Number of Responses</b>
Activism from the university community (students, faculty, staff)	4
High-level university/institutional/legal leadership demanding greater support	4
Accessibility linked with prestige, trendiness, or impact	4
Real-world examples and connection to why accessibility is important beyond simply technical compliance	4
Legal action (i.e., being sued)	4
Funder mandates and legal requirements	3
Budget and cost savings	2
Increased awareness of library publishing services/content	1

General comments were shared in this section as well, and while they did not rise to the level of a suggestion, they are important to list here. One respondent noted that there is very low capacity for accessibility work in their institution, and no leverage with which to force their community to comply with accessibility guidelines. The same respondent shared a feeling of general hostility towards and lack of support for accessibility services across the university.

The final question of the survey allowed respondents to share final thoughts they had about accessibility services and their library publishing program. Five respondents chose to respond to this question and their thoughts are summarized here. The first respondent stated that faculty and librarians at their institution are supportive of

accessibility when publishing Open Access content with their program, but the university itself is hostile. Another respondent shared that much of the accessibility work is siloed across various units creating content. Yet another noted lack of resources and a perceived lack of attention and care about any of their library publishing work. Another provided suggestions and feedback on the survey, asking for a wider range of institution types to present in Question 18. The final respondent shared feelings about working in a compliance-driven landscape, rather than one that is value-driven. They noted that because of the new legal requirements for accessibility there would be more success if Open Access was a requirement for Accessibility, not the other way around.

### **The Non-U.S. Responses**

While the results from the three international respondents and respondent who chose to withhold their country were removed from the main analysis because the majority of the respondents were from the USA and would not help support generalizable, U.S.-focused results, it is important to give a brief overview of how their responses compared to the rest of the data set. First of all, all of the respondents identified as library publishers according to the Library Publishing Coalition's definition of Library Publishing. They all also noted that they publish Open Access content. They were all in agreement that no cost barrier to read/access content is important in the definition of Open Access, as well as no copyright or legal barrier to use/reuse. Three of the four respondents also felt that no accessibility barriers were necessary.

Only one of the publishing programs indicated that they provide accessibility support through their publishing program. That respondent shared that they provide accessible templates for editors/authors, as well as website accessibility. One other respondent also noted website accessibility as an area of support, though not from their program directly. All four respondents noted that training in accessibility and funding for technology are resources that are required to provide accessibility support, and two respondents included funding for personnel as a resource need as well.

When it came to administrative support, all four respondents felt that their administrative is support of accessibility in principle, but only one felt they had financial resources to provide support, with two noting “I’m not sure” and the final respondent answering “no.” The respondents felt the same for administrative support, except that one of the respondents that said “I’m not sure” for the previous question answered “yes” for administrative support.

For Open Access, all four respondents felt they had both financial and administrative support, and three of the four noted that they felt their administration support Open Access more, while the last respondent noted that they support both Open Access and accessibility equally. Two of the four respondents noted that the revision of Title II of the Americans with Disabilities Act in the U.S. did not have any impact on their accessibility work, while one stated that it did, and the last respondent said, “I don’t know.” Finally, all four respondents agreed that yes, if the definition of Open Access were to include accessibility as a requirement to achieve full openness, that it would encourage their administrators to provide more support for accessibility work. These respondents chose not to complete question 16 which asked about suggestions for

encouraging greater financial and administrative support for accessibility, except for one respondent who said, “I don’t know.”

## Chapter 6

### Analysis

While the data sample was not as large or diverse as preferred, the results still provide important insights into the thoughts of U.S.-based library publishers. The data shows trends in perceptions around accessibility and Open Access and the barriers to expanding and providing accessibility support to the content they publish, if only from a predominantly U.S.-based, R1 institution perspective. When asked the question about the definition of Open Access and whether library publishers believe that accessibility is a component of Open Access, 15 of the 21 respondents chose “no accessibility barriers” and/or “limited accessibility barriers” in addition to “no cost barrier to read/access” in their answers. These responses indicate that over 70% of the respondents believe that at least some removal of accessibility barriers is necessary for work to truly be considered Open Access. It is important to consider one of the “other” responses to this question where the respondent clarified that their answers were what they believed *should* be happening in Open Access publishing, but not what they think currently *does* happen. This response is not surprising, considering all the barriers that have been documented in research for providing accessibility support in Open Access, and provides more evidence for the importance of this study.

It is also promising that over 75% of respondents shared that they already provide accessibility support, despite these barriers. These results seem to be in line with the previous question, where 15 respondents identified the importance of accessibility work

in Open Access publishing. Additionally, these responses support the theory that library publishers are an ideal group of Open Access publishers to move the accessibility movement forward and thoroughly integrate it with Open Access. The kinds of accessibility support that library publishers provide was largely “website accessibility,” meaning ensuring their publication sites themselves (omitting uploaded content like PDFs) are accessible, and “accessibility guides or FAQs.” These kinds of accessibility support, while important, are the least resource-intensive, as most universities’ information technology teams ensure web accessibility for university websites and many useful and detailed FAQs and guides exist to provide passive support.

However, “PDF remediation” and “accessibility training” were both chosen by over 40% of respondents, and almost 30% chose “accessible templates for editors.” These results are not insignificant, because it shows that nearly one third of respondents are providing more in-depth accessibility support in these ways. The “other” responses to this question provided more detail about the type of accessibility support provided, including alternative text support and a process for hiring part-time and/or student staff to support this work within their programs. One respondent noted that this work is dependent on available funding. Another respondent shared the accessibility work they are incorporating into their Pressbooks publishing workflow.

Question 6 invited respondents to share any additional accessibility services their program provides, and 5 chose to answer. The low number of respondents to this question is not surprising and is likely due to the multiple-choice options of Question 5 well representing their services. Two answers provided additional context on the web accessibility team that the respondents had access to at their respective institutions.

Another shared that they will do PDF remediation on a case-by-case basis, rather than as a consistent service. The final two detailed their high accessibility criteria for platforms and work to support accessibility in for content in STEM fields, particularly math. It is important to note that all five respondents are from R1 institutions in the U.S. Once again, this provides insight and evidence into the fact that accessibility work is important to library publishers, especially when they have adequate resources to incorporate it into their workflows.

When asked about what resources are necessary to do accessibility work, “Funding for technology,” and “funding for personnel” both received over 20 selections each, and “Training in Accessibility (for library publishing staff)” received 19 selections. Fifteen respondents felt that all 3 were important and selected them all, meaning over 70% of respondents feel that training and funding are equally important for this work.

The responses to questions about library administrators’ support in principle for accessibility, and the resources they provide for that work reiterate a difficult reality in higher education publishing. While 90% of respondents indicated that they feel their administrators are supportive of accessibility work, only roughly 30% feel that support in a tangible, financial way.

These results can be closely compared to the questions about support for Open Access, both in principle and directly. 95% of respondents said they feel support from their administration in principle, and 90% said they feel financial support for Open Access work as well. This is an overwhelming amount of support for Open Access, though not surprising in the academic library landscape where Open Access has been increasingly championed and valued in recent years. The percentage of library publishers

who feel they have administration's support both in principle and financially are much more in line with one another than the support felt and given for accessibility work. To illustrate that point clearly, the following question asked respondents to compare how they felt their administrator's support for accessibility compared with Open Access. Over 50% of the respondents believe their administrators support Open Access more, just over 30% shared that they support both equally, and surprisingly almost 10% of respondents believe their administrators support accessibility more than Open Access.

To identify whether recent government rulings in the United States have influenced library administrators' support for accessibility, the next question asked about the April 2024 revised ruling from the U.S. Department of Justice about Title II of the Americans with Disabilities Act. Interestingly, most respondents indicated that has not had an impact on their library administrations' support for accessibility work, even though all of these respondents are from the United States. Only five respondents, making up just under a quarter of the responses, said that it had had an impact, and seven said that they were unsure. This seems to indicate that despite this ruling's serious implications for accessibility in government-funded institutions when it goes into effect in April 2026, there has not been a coordinated discussion or show of support from library or academic leadership for almost 60% of the respondents.

It is clear from these results that many library publishers feel their administrators do not support accessibility to the same degree that they support Open Access, nor do they feel they have the same financial resources for both areas of work. Despite this, library publishers feel that accessibility is important to provide full access to all users in society. Applying Rawls' theory to these results indicate that library publishers are



already striving to fulfill the ideals of justice as fairness and distributive justice. They are working to ensure that the least advantaged individuals, those who are held back from full online participation due to inaccessible materials, can interact with the content they publish equitably. Unfortunately, funding and administration-level support is holding library publishers from accomplishing this goal.

To try and determine what opportunities there may be to elicit greater support from leadership, the survey asked respondents to share if they believe that administrators would support accessibility work more if accessibility was a direct component of Open Access. Would they provide more support if content could not be considered Open Access unless it was also accessible? Over 30% of respondents felt that this kind of definition change would have an impact, but just over 60% either were unsure or did not think so. Of the roughly 50% of respondents that said “no” or “I’m not sure,” almost 70% (9 out of 13) noted they believed removing at least some accessibility barriers were required for digital content to be considered Open Access. Only two of those 13 respondents noted that they did not provide accessibility support in their programs or were not sure, and those same individuals were the only two to note that they did not feel their administrators were supportive of accessibility in principle. However, 60% of those 13 respondents also felt that they did not have financial support from their administration, and over 45% of those 13 respondents felt they did not have administrative support for training and professional development. These responses taken together seem to relate more to the uncertainty around library and university leadership’s values for accessibility and what may motivate those leaders to change, rather than library publishers’ beliefs about accessibility and Open Access.

The responses to Question 16 provided some of the most meaningful insights into what library publishers believe may inspire change in how accessibility and Open Access are viewed and supported by their administrators. The 19 respondents who chose to answer provided comments that fell within eight general categories. The answers with the highest responses all had to do with pressure and influence from external forces. First and foremost, it was strongly believed that student, faculty, and community activism has the strongest effect. Similarly, many felt that pressure from the highest level of university/institutional leadership was necessary for their local library and business administrators to change. Several of these responses discussed feeling a disconnect from upper-level leadership, and a lack of understanding between the importance of accessibility in their work and the values that their institution holds. Other most discussed options were to make accessibility “trendy” or linked with prestige and impact.

Multiple respondents also indicated that if there were real-world examples of the importance of accessibility and why it matters beyond checking off a technical compliance issue, it might make a difference. The disappointing part of this suggestion is that there are “real-world examples” all throughout our society. According to the United States Census Bureau (2024), 44.1 million Americans (13.4% of the population) have a disability. The challenge being raised here appears to be the continued lack of acknowledgement or visibility of those individuals. To again apply theory, distributive justice and justice as fairness encourage society to recognize that everyone is born with the same infeasible rights to liberty and access to goods and wealth in society, and in this situation, that is the wealth of knowledge and access to the online world. When everyone has greater access and more accessible content online, all people in society

benefit. But fighting for culture change and increasing the visibility of people with disabilities in the digital sphere and the impact that accessibility work can have in the real world is nothing new to accessibility advocacy (Jaeger, 2015; Lazar, Goldstein, & Taylor, 2015). It has also not been a foreign argument in Open Access advocacy either, as many are still arguing for visibility in areas of injustice that still exist in the movement today (Mattaini, 2004; Raju & Claassen, 2022). While these responses are unsurprising due to the similarity of how these movements have progressed, it is still disheartening that struggling for visibility, justice, and equity remains a major concern for people with disabilities.

Perhaps also disappointing, but likely correct, were the comments about legal action and consequences for non-compliance. Many respondents noted that their institutions would likely not be motivated to change until they or a peer institution are sued and the legal ramifications of not providing accessible content become clear. Along those lines, other responses suggested that funders mandating that research outputs be made accessible would also have an impact, as well as further legal requirements such as the revision of Title II.

The final comments were less common but shed further light on how library publishers view this potential for change. The responses included budget and cost savings suggestions, such as how having a greater budget could be very impactful, as well as advocating for how creating born-digital content is much cheaper than having to make content accessible after creation/publication. It is true that born-digital content and setting content up to be as accessible as possible in the beginning is far more economical and

easier for everyone to use in the long run (Kelly et al., 2009). Perhaps discussing accessibility as a cost savings measure with proven data could be a path forward.

Another respondent shared that they feel very unseen in their institution and do not even know if their administrators know or care that the content they publish will need to be made accessible. The last respondent simply noted that they did not know what could be done to increase their administrator's support for accessibility work. These comments are unfortunate and shed light on a group of library publishers that are still struggling for visibility within their institutions.

Finally, the last question allowed respondents to share final thoughts, and while these insights do not necessarily provide suggestions for change, they do help to illuminate the landscape of accessibility work in library publishing programs. It was heartening to read how one respondent's faculty and librarian communities are supportive of accessibility and understand the importance of the work, despite their university itself being hostile supporting people with disabilities on their campus. While these are anecdotal comments, the survey asked primarily for the feelings and perceptions of library publishers on these topics, so the hostile environment that this respondent feels is important to acknowledge. The comment about siloed work is also essential to recognize, and unfortunately a common concern within higher education institutions. Identifying ways to collaborate across large institutions, especially on accessibility initiatives, would likely help to improve efficiency and provide opportunities for sharing budgets and expertise. Another respondent's comments about living in a compliance-driven world are also well-received, and well-noted. Open Access has seen many strides forward in recent years due to the adoption and success of university Open Access policies, and funder

requirements (Huang et al., 2020). It is likely that in connecting more closely with the Open Access movement and with increasing legal requirements, accessibility could see a similar move forward.

### **Analyzing International Data**

When comparing the four international responses with the U.S. data, the results overall are not strikingly different, though there are important areas of contrast. Like their U.S. counterparts, the majority of the four respondents felt that removing accessibility barriers in Open Access work was important to achieve that openness. However, only one of the four respondents noted that they provide accessibility support, which is a much smaller ratio than the over 75% of U.S. library publishers that provide some level of accessibility support.

The responses about what resources are necessary to provide accessibility support was in line with the responses from their U.S. peers, and they also shared unanimously that they believe their administration is supportive of accessibility in principle, but only one respondent (25%) felt that they have financial support to provide accessibility services. While this sample was quite small and cannot be representative, it is interesting to note that these percentages nearly mirror those of the U.S. data sample.

Also not surprising was that all respondents believed that their administrators were supportive of Open Access in principle and that they felt they had financial support. Three of the four also believed that their administrators supported Open Access more than accessibility, and the final respondent felt they supported them both equally. These

results are also in line with the U.S. results, with more respondents feeling a stronger support for Open Access than accessibility.

Perhaps not surprisingly, half of the respondents did not feel that the revision of Title II of the ADA in the U.S. had impacted their administration's view of accessibility, but one did indicate that it had, and the last was unsure. Considering the spread of responses in the U.S. data set, these responses are not atypical either.

The most surprising and significant result from this group was the answer to the question about adding accessibility directly into the definition of Open Access. All four respondents felt that this would have an impact on how their administrators view accessibility and would encourage them to provide more support for accessibility work.

## Chapter 7

### Conclusions, Recommendations, and Next Steps

The results of this study provide the insights needed to make a few conclusions about the accessibility and Open Access movements and the readiness of library publishers to help move these movements forward together. The survey sample and feedback from respondents have also solidified some next steps and recommendations for future studies.

#### Conclusions

This study set out to answer four main questions: Do library publishers believe that accessibility is a crucial part of something being Open Access? Do they feel they have the resources to provide accessibility support? If not, what are the barriers they face? And what can or should be done to move past those barriers and push for greater resources and support? First and foremost, the data collected suggests that these library publishers value removing accessibility barriers as much as they value removing financial and copyright barriers. The data also suggests that they provide nearly as much accessibility support within their programs as they do Open Access, which was a pleasant surprise.

However, there was a stark difference between the amount of support and resources library publishers felt they had from their budget administrators for Open

Access work compared to accessibility work. Many shared that they did not have extra financial support to participate in trainings or to purchase software, despite noting that these things are important to providing accessibility services. Because of this, most of the accessibility support respondents were providing were FAQs and guides about accessibility, limited trainings, or PDF remediation. Most shared web accessibility as an area of support, likely because most institutions' information technology and web development teams are responsible for ensuring the accessibility of their websites because of previous ADA guidelines.

A few respondents even noted that they felt unseen or lacked direction from leadership about providing accessibility services formally. One respondent even noted that their university seems to outright disregard the accessibility needs of its community, a comment that is very disheartening. This points to another barrier: the lack of leadership, vision, and direction from administration. One respondent shared that this work needs to be bigger than just the library, which is evident from the results.

Interestingly, the respondents did not seem to believe that the recent Title II revision of the Americans with Disabilities Act requiring government-funded institutions to publish fully accessible content on their websites had influenced their leadership's views and values for accessibility. Perhaps it is still too soon to tell, considering the legal ramifications of non-compliance will not take place until April 2026. The survey did not ask if the respondents were from public or private institutions, but at least in the U.S., several R1 schools receive government funding in some capacity, and a greater reaction to this ruling was anticipated.



The hypothesis of this study was that library publishers would agree that linking accessibility to the Open Access movement would encourage more support for accessibility services within their work. When asked directly in the survey, nearly half of the respondents answered “yes,” and agreed that this kind of definition change would increase the support they feel from their administrators. The other half was largely unsure, despite the majority of those respondents sharing that they believed removing accessibility barriers was required for something to be considered Open Access. This answer is closely related to the uncertainty around the values of their leadership, and what motivates them to change.

Still, when respondents were asked to share their own ideas about what might change their administration’s mind, one of the most popular responses was an increase in funder or legal requirements. This is something that has helped the Open Access movement to grow, with funders requiring that grant-funded research outputs be made openly available and institutions adopting Open Access policies. Considering this, it is not a stretch to say that if accessibility were a part of what it means to be Open Access, then the funder and university requirements around publishing Open Access would by extension require that work to be accessible as well. The inclusion of accessibility in the definition of Open Access could indeed achieve what these respondents are suggesting without requiring extra mandates to be set in place.

However, greater mandates for accessibility do seem to be on the horizon. The Title II revision of the ADA may be just one of many steps toward greater accessibility of online content, or so practitioners might hope. Additionally, Rawls’s theories of justice as fairness and distributive justice are in line with the feedback and results of the study, with

most of the answers indicating that library publishers believe that we cannot have true Open Access to content in society if those with disabilities or who use assistive technologies do not have access. Many of the library publishers shared feelings of frustration around the lack of support for accessibility resources, with one outright exclaiming “IT IS THE RIGHT THING TO DO.” Unfortunately, until the implications of non-accessible content which falls under the revision of Title II, it will be difficult to tell whether compliance-based motivations will truly provide the change needed to bring the accessibility to the level of current Open Access support.

### **Recommendations**

There are a few recommendations for future studies, especially to clarify some of the results that were captured. If this study were to be repeated, clarifying definitions in parentheses for the options in Question 3 is recommended. In this question, there were six options to choose from to help respondents compile their own definition of what it means to be Open Access. The definitions around no or reduced copyright or legal barriers were a bit confusing, leading at least one respondent to share their thoughts on copyright and legal barriers in the “other” open text box answer. The “Reduced copyright or legal barriers (i.e. free to read content that is copyrighted)” definition contained a parenthetical definition that is a better example for the first option, “No cost barrier to read/access.” A better example for “Reduced copyright or legal barriers,” as pointed out by one of the respondents, would be an open access license such as the Creative Commons Attribution-

NonCommercial-NoDerivatives license<sup>2</sup>, or similar. The example for “No copyright or legal barriers” option would be the most permissive license, the Creative Commons Attribution license, or perhaps content in the Public Domain. While these definitions were slightly misaligned in this study, most of the respondents appeared to choose based off the option titles themselves and not the definitions, and with this small sample it did not appear to impact the data significantly.

Another recommendation is to collect the public or private status of respondents’ institutions. Often, public universities and colleges are beholden to government laws and requirements that private institutions are not, especially in the U.S. This information could be valuable to collect, especially when considering legal or funder requirements for compliance.

Finally, it would be useful to clarify “administrators” or “administrative support” within the study questions. This was attempted in question nine, where the administration was identified as the “entity that funds your publishing program,” but some respondents still asked which administration the question referred to: library administration or university, top-level administration. It may also be helpful to ask questions about both groups, as a few respondents noted that the library is very supportive of accessibility work, but that it is not typical of the rest of their institution.

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<sup>2</sup> Creative Commons licenses are Open Access licenses that remove most copyright and legal barriers to use and reuse, with varying levels of openness based on the license. See <https://creativecommons.org/share-your-work/cclicenses/>

### Next Steps

There is much still to learn in this area, and a lot of room for future studies to collect meaningful data. Because of how small the data set turned out to be, the next step in this research would be to repeat the study and focus on collecting a much larger sample that will be more representative of the library publishing field. It would also be interesting to recruit respondents from international library publishers as well, to pull together a larger picture of accessibility work within library-based Open Access publishers.

Another step would be to expand the study to include more university-based publishers, such as university presses or society publications based within university departments. These programs, while different from library publishers in practice, share many of the same values and mission-driven goals as library publishers, and value accessibility similarly. They may also be impacted by legal and other requirements than library publishers or face different barriers and challenges to making content accessible. These elements may also be very insightful in determining whether accessibility becoming a crucial piece of the Open Access definition would allow for greater accessibility of scholarly content.

The goal of this study has been to move beyond the work of previous studies that only ask library publishers about the barriers they face in their work to make scholarly content accessible, and instead identify ways to move past those barriers and create real and lasting change. It is possible that connecting the accessibility and Open Access movements more directly could be a catalyst for that change, but many believe that any

change would be largely due to increased funder and legal requirements for accessibility. Whether legal requirements will be enough to motivate institutional and library leaders to provide more support and funding for accessibility work, time will only tell. But the fact remains that accessibility work is something library publishers remain passionate about, even with limited resources, and they are working toward making accessibility as important as Open Access while they wait for the rest of the world to catch up.

## Appendix

### Survey Questions

Reproduced here is the full survey that was sent to participants during the study.

#### Study Definitions

**Accessibility** is defined by the World Wide Web Consortium (W3C)'s Web Accessibility Initiative (WAI) group, **as digital content which is "designed and developed so that people with disabilities can use them" (W3.org)**. It means creating published materials (PDFs, HTML pages, ePubs, websites, etc.) that conform to Web Content Accessibility Standards (WCAG). "Accessibility" in this context does not refer to the ability for someone to find or get ahold of content that may be otherwise difficult to access.

**Open Access** is defined as **the free, immediate availability of scholarship, typically online, combined with the removal of barriers (legal/copyright or otherwise) for use and reuse**. The principals of Open Access were described in the Budapest Open Access Initiative (BOAI) as: "the world-wide electronic distribution of peer-reviewed journal literature and completely free and unrestricted access to it by all scientists, scholars, teachers, students, and other curious minds" which works to "accelerate research, enrich education, share the learning of the rich with the poor and the poor with the rich, make

this literature as useful as it can be, and lay the foundation for uniting humanity in a common intellectual conversation and quest for knowledge.”

Please refer to these definitions as needed when answering the questions.

Question 1:

The Library Publishing Coalition defines Library Publishing as “the set of activities led by academic and research libraries and library consortia to support the creation, dissemination, and curation of scholarly, creative, and/or educational works. Generally, library publishing requires a production process, presents original work not previously made available, and applies a level of certification to the content published, whether through peer review or extension of the institutional brand. Based on core library values, and building on the traditional skills of librarians, it is distinguished from other publishing fields by a preference for Open Access dissemination as well as a willingness to embrace informal and experimental forms of scholarly communication and to challenge the status quo.”

Based on this definition, do you work as a library publisher?

- Yes
- No
- I’m not sure

Question 2:

According to the definition of Open Access above, does your library publishing program publish Open Access content?

- Yes
- No
- I'm not sure

Question 3:

Keeping in mind the definitions of Open Access and Accessibility above, what qualities do you believe a piece of scholarship must have in order for it to be considered Open Access? Please select all that apply.

- No cost barrier to read/access
- No cost barrier to publish (no Article Processing Charges/APCs)
- No copyright or legal barrier to use/reuse (using a Creative Commons License, for example)
- Reduced copyright or legal barriers to use/reuse (ie. Free to read content that is copyrighted)
- No accessibility barriers (fully tagged documents for screen readers with alt text, accessible figures, etc.)
- Limited accessibility barriers (ie. Only including alt text or accessible figures)
- Other (open text box)

Question 4:

Does your library publishing program provide any Accessibility support for the work you publish and/or host?

- Yes



- No
- I'm not sure

Question 5:

If yes, what kind of Accessibility support do you provide? Select all that apply.

- Accessible templates for editors/authors
- Accessibility training (for tools such as PDF, Word, InDesign, and/or website accessibility)
- Accessibility guides or FAQs
- PDF remediation
- Website accessibility
- Other (open text box)

Question 6:

Is there other accessibility support you provide that you would like to describe in more detail?

- Open text box

Question 7:

Whether you currently provide accessibility support or not, what resources do you believe are necessary to do Accessibility work in library publishing?

- Training in Accessibility (for Library Publishing staff)

- Funding for personnel (to do the Accessibility work or provide Accessibility support)
- Funding for technology (such as Adobe Acrobat, InDesign, AxesPDF, CommonLook, etc.)
- Other (open text box)

Question 8:

Do you believe your administration is supportive of Accessibility in principle?

- Yes
- No
- I'm not sure

Question 9:

Do you feel that you have **financial support** from your administration (or entity that funds your publishing program) to pursue and provide Accessibility services? This could be funding for additional personnel, funding for tools/technology, etc.

- Yes
- No
- I'm not sure

Question 10:

Do you feel that you have **administrative support** for pursuing and providing Accessibility services? This could be time allocated to Accessibility training, professional

development funds for training/conferences, Accessibility work built into job descriptions, etc.

- Yes
- No
- I'm not sure

Question 11:

Do you believe your administration is supportive of Open Access in principle?

- Yes
- No
- I'm not sure

Question 12:

Does your administration financially support Open Access?

- Yes
- No
- I'm not sure

Question 13:

Do you believe your administration is as supportive of Accessibility as they are Open Access?

- Yes, they support them equally
- No, they support Open Access more
- No, they support Accessibility more
- They do not support Accessibility or Open Access

Question 14:

In April 2024, the United States Department of Justice passed a ruling that revised Title II of the Americans with Disabilities Act to more clearly define requirements for the accessibility of web content and mobile apps for government entities and government funded institutions and has established a deadline for conformance. Other Accessibility legislation is being passed internationally as well. Have new legal rulings impacted your library administrators' support for Accessibility work?

- Yes
- No
- I'm not sure

Question 15:

If the definition were to more directly include Accessibility as a requirement for being called Open Access, do you think this would encourage your administrators to provide support (or more support) for Accessibility work?

- Yes
- No
- I'm not sure

Question 16:

Besides legal requirements and a change in definition to Open Access, what do you believe would encourage your budget administrators or program/library directors to provide greater **financial** and **administrative** support for Accessibility work?

- Open text box

Question 17:

In what country is your library publishing program located?

- USA
- Canada
- Other: *Open text field*
- Prefer not to answer

Question 18:

What is the classification or type of institution to which your library publishing program belongs?

- R1
- R2
- R3
- Research university (Canada)
- Primarily Undergraduate University (Canada)
- Comprehensive University (Canada)

- Library consortium
- Other: *Open text field*
- Prefer not to answer

Question 19:

Please share any final comments you may have about Accessibility services and your library publishing program.

- Open text box

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