



Surveying the Open Scholarship Policy Landscape—Introducing the ‘Policy’ Research Scan, available open access via the Open Scholarship Press

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At a Glance / En un coup d'œil

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Summary

This post introduces the *Policy research scan*, available open access via [the Open Scholarship Press](#).. The *Policy* research scan follows and reflects policy developments related to open scholarship in Canada and beyond, analyzing policy changes and their relevance to researchers, information professionals, librarians, faculty, and policymakers. With roots in the Open Scholarship Policy Observatory, this resource takes a Canadian focus and an interest in the humanities and social sciences (HSS), but it takes a broad view, considering open scholarship as an international and interdisciplinary movement.

Introducing the ‘Policy’ Research Scan, available open access via the Open Scholarship Press

This post introduces the *Policy research scan* (Winter et al. 2023), available open access via [the Open Scholarship Press](#).

The *Policy research scan* follows and reflects policy developments related to open scholarship in Canada and beyond, analyzing policy changes and their relevance to researchers, information professionals, librarians, faculty, and policymakers. With roots in the [Open Scholarship Policy Observatory](#), this resource takes a Canadian focus and an interest in the humanities and social sciences (HSS), but it takes a broad view, considering open scholarship as an international and interdisciplinary movement.

The *Policy research scan* covers topics related to questions about open scholarship policy, including those such as:

- How and to what extent does policy advance open scholarship?
- What effect does policy have on individuals and their work?
- How does policy affect open scholarly practices?

Open scholarship is an umbrella term that refers both to open scholarly practices, such as open peer review, and their outcomes, such as open access publications. Although open scholarship is sometimes referred to as “open science,” it is not discipline specific, comprising all disciplines and a variety of interrelated practices and principles. What began more than 20 years ago as small-scale and local has evolved into a global movement, but one that advances unevenly and, in many ways, uneasily (Tennant et al. 2019).

The research scan consists of 100s of individual annotations divided into six main sections: *Foundational Policies and Policy Frameworks*; *Open Scholarship and the Open Scholarship Movement*; *Scholarly Communication*; *Infrastructure*; *Collaboration and Community Engagement*; and *Policy Development, Implementation, and Analysis*. These core themes are further divided into sub-sections. An *analytical introduction*, written by Caroline Winter, opens the scan.

A brief overview of each section and its subsections in the *Policy research scan*

follows.

Foundational Policies and Policy Frameworks

The first section, *Foundational Policies and Policy Frameworks*, focuses on foundational policies that have informed the open scholarship movement and its constituent movements.

Examples of policies in this section include *ACRL's Policy Statement on Open Access to Scholarship by Academic Librarians*, the *Budapest Open Access Initiative*, and the *Jussieu Call for Open Science and Biodiversity*—to name but a few.

Each policy featured in this section includes bibliographic information and a short summary.

Open Scholarship and the Open Scholarship Movement

The second section, *Open Scholarship and the Open Scholarship Movement*, comprises resources about the movement's history, values, and progress.

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The *Open Scholarship and the Open Scholarship Movement* section is divided into five sub-sections:

- *Open Access*
- *Open Data*
- *Open Education*
- *Open Knowledge*
- *Open Source*

Because open scholarship encompasses so many things, it is difficult to define. George Veletsianos (2016) describes it as “the wide and broad dissemination of scholarship by a variety of interconnected means (e.g., technology, licensing) aiming to broaden knowledge and reduce barriers to access to knowledge and information”

(16). Similarly to Veletsianos, the INKE Partnership **defines open social scholarship as** “academic practice that enables the creation, dissemination, and engagement of open research by specialists and non-specialists in accessible and significant ways” (“**About INKE**”).

Scholarly Communication

Open scholarship is facilitated and made possible by digital technologies, but openness is not inherently digital, and those digital technologies are not necessarily open. As many authors in the **third section**—which focuses on the theme of *Scholarly Communication*—note, while digital technologies have enabled scholarly journals to have a broader reach through open access, scholarly communication as a whole needs to move away from models based on the paradigm of print production and embrace a networked paradigm (Maxwell 2014).

Resources in this section describe the scholarly landscape, how it has changed over time, the role of libraries in open scholarship, various publication and business models at play, and the issue of open monographs. The *Scholarly Communication* is divided into four sub-sections. These are:

- **The Scholarly Communication Landscape**
- **Libraries and Open Scholarly Communication**
- **Publication Models and Subscription Practices**
- **Open Monographs**

Infrastructure

The *Infrastructure* section presents resources addressing digital research infrastructure, funding models, bibliometrics, intellectual property, identity management, linked open data, and research data management. It is the **fourth main section**, and comprises the following seven sub-sections:

- Digital Research Infrastructure (DRI)
- Funding Models and Infrastructures
- Bibliometrics
- Intellectual Property and Copyright
- Identity Management
- Linked Open Data
- Research Data Management

Collaboration and Community Engagement

Another theme that emerges across the section and entries in the *Policy* research scan is that open scholarship is inherently social and collaborative. The fifth section, *Collaboration and Community Engagement*, includes resources related to this theme.

Specifically, this section includes resources related to knowledge mobilization and translation, community engagement, public scholarship, and crowdsourcing and citizen science. It consists of the following four sub-sections:

- Knowledge Mobilization and Translation
- Community Engagement
- Public Scholarship
- Crowdsourcing and Citizen Science

Policy Development, Implementation, and Analysis

The term “policy,” as Winter (2023) points out, is quite broad, and the *Policy research scan* uses it to encompass not only formal international, national, and institutional policy statements but also formal and informal policies about the issues and topics that constitute open scholarship (e.g., open access, open data) and adjacent issues (e.g., copyright; review, tenure, and promotion).

The sixth and final section, *Policy Development, Implementation, and Analysis*, contains resources related to open scholarship practices, institutional policies, national and international policy, and social justice. This section is divided into the following four sub-sections:

- Open Scholarship Practices
- Institutional Policy and its Implementation

- National and International Policy and its Implementation
- Social Justice

Last Words

A cultural shift is necessary in order for open scholarship to become the default scholarly mode; this will involve dispelling persistent myths about the nature of open access and open scholarship, such as the myth that open access journals are not peer-reviewed and are largely predatory. It will also involve shifting how we value scholarship from a model of exclusivity, in which publishing in the most exclusive, subscription-based journals confers the most scholarly value, to one of open inclusivity, what Kathleen Fitzpatrick (2019) calls “generous thinking” (see also MacCallum et al. 2020).

Too often, it seems, while policy plays a role in many areas of the scholarly ecosystem, it is not always named or understood as policy. In outlining the scope of the field, the *Policy research scan* goes a long way to supporting efforts to name and see policy as policy—and, thereby, towards efforts to shift how we conceive of, value, and recognize scholarship.

About the Open Scholarship Policy Observatory and the Open Scholarship Press

The **Open Scholarship Policy Observatory** is a hub for information and resources related to all aspects of open scholarship that includes a collection of policy documents as well as policy analysis. The Observatory was created in recognition of the development of numerous and increasing numbers of open access policies and mandates, as well as confusion about the various routes to open access and which approach works best (Milligan et al. 2019). It is an initiative of the Implementing New Knowledge Environments (**INKE**) Partnership's **Policy Cluster**, co-facilitated by Tanja Niemann and Lynne Siemens, and is coordinated by the Canadian Social Knowledge Institute (**C-SKI**), based in the Electronic Textual Cultures Lab (**ETCL**) at the University of Victoria.

The **Open Scholarship Press** makes relevant open social scholarship research and output available openly to academics and non-academics alike. The Open Scholarship Press curates, publishes, and republishes foundational, significant open access work in open social scholarship, as well as select and important work emerging in the area.

Other Publications Available via the Open Scholarship Press

The Open Scholarship Press has published several research scans and collections that are openly available via **Wikibooks** including:

- **Knowledge Mobilization in the Humanities**
- **Engaging Knowledge Diversity**
- **Engaging Platforms in Open Scholarship**
- **Foundational Observations: Open Scholarship Policy Observatory, 2017-2020**
- **Observations préliminaires : Observatoire des politiques d'Érudition ouverte, 2017-2020**
- **Extensions: Open Scholarship Policy Observatory, 2021-2024**
- **Extension : Observatoire des politiques d'Érudition ouverte, 2021-2024**
- **Open Scholarship Press Collections: Training**
- **Open Scholarship Press Collections: Policy**
- **Open Scholarship Press Collections: Connection**
- **Open Scholarship Press Collections: Community**

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