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# Introduction

## *Open Scholarship in the 21st Century*

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*These proceedings are dedicated to the memory of Dr. Stéfan Sinclair, preeminent digital humanities scholar and much valued INKE Partnership community member. Stéfan's obituary from the Canadian Society of Digital Humanities is available at [csdh-schn.org/stefan-sinclair-in-memoriam](https://csdh-schn.org/stefan-sinclair-in-memoriam) and [reprinted in this collection](#).*

The concept and practice of open scholarship are gaining prominence in local, national, and international contexts. Although distinct from the Open Access movement, open scholarship ac-

tivities build on a foundation of access to research output. As Kathleen Fitzpatrick argues, “[e]nabling access to scholarly work does not just serve the goal of undoing its commercialization or removing it from a market-driven, competition-based economy, but rather is a first step in facilitating public engagement with the knowledge that universities produce” (2019, 148). Open access, here, is a crucial “first step” to something broader, more complex, and importantly, more centred on public engagement: a first step to “open social scholarship,” as the Implementing New Knowledge Environments (INKE) Partnership deems such activity (Powell, Mauro, and Arbuckle 2017; El Khatib et al. 2019). Many higher education institutions and associated knowledge communities are on this trajectory towards more open and more social practices, including in the areas of scholarly communication, open access, digital publishing, data management, knowledge mobilization, social knowledge creation, and community engagement. These activities represent opportunities to create knowledge across traditional disciplinary and institutional boundaries, as well as with members of the broader public. As early as 2007 Christine Borgman made a case for open scholarship in *Scholarship in the Digital Age*; there, Borgman considers open scholarship to “depend on access to publications, and often to the data on which they are based” (115). Over a decade later, the degree to which open scholarship—and moreover, open *social* scholarship—relies on the first step of open access is increasingly evident.

Within this context, the last few years have brought significant developments worldwide. In 2015, the chief Canadian academic funding agencies released their Open Access Policy on Publications (Government of Canada 2015), requiring open access to the published results of work funded by these public agencies. In 2018, the European-based cOAlition S’s “Plan S” was announced—a commitment from over 20 granting agencies to only fund open access research. In 2019 alone the University of California system split with major academic publisher Reed-Elsevier in the US over the publisher’s limitations, conditions, and costs associated with access to scholarship (U California 2019); the Council of Australian University Librarians and Australasian Open Access Strategy Group issued a joint statement in advance of the Australian federal election calling for a national strategy for open scholarship (CAUL and AOASG 2019); and the British Columbia government announced a \$3.26 million investment in open educational resources in the province (Government of BC 2019). Despite this significant investment and movement, the challenge of open scholarship implementation remains. How is the development of open scholarship shaped? What sort of infrastructure is needed? Who is involved, and what are their roles? Who isn’t involved, and should be? Open scholarship in the 21st century has the potential to be more inclusive, dynamic, interdisciplinary, and functional than ever before: how do we get there?

In December of 2019 and January of 2020 two sister events engaged issues of open social scholarship: building on previous years' meetings and discussions, including those aligned with the Australasian Digital Humanities Summer Institute, DH Downunder, we held the first formal annual gathering of the Canadian-Australian Partnership for Open Scholarship (CAPOS) in Newcastle, Australia, and the seventh annual winter gathering of the INKE Partnership in Victoria, Canada.<sup>1</sup> The CAPOS gathering, titled "Knowledge Engagement in the 21st Century: Approaches to Open, Digital Scholarship" brought together a mid-sized group of students, librarians, researchers, and administrators to discuss current and future endeavours in and strategies for digital scholarship. The INKE gathering, "Open Scholarship for the 2020s," was similarly forward-looking and brought together a slightly larger group of researchers, students, librarians, and academic-aligned groups around the topics of scholarly communication, open access, digital scholarship, and community engagement. This special issue is representative of some of the key event proceedings from both of these events, as there is much overlap between the conversations and questions raised. Event presenters heralded from Australia, Brazil, Canada, South Africa, the United Arab Emirates, and the United States of America, and thus lent a global perspective to open social scholarship and how it can be undertaken.

The INKE Partnership brings together a broad, diverse group to address scholarly communication challenges and realize open, inclusive, and publicly-engaged scholarship that serves both academic interests and society at large.<sup>2</sup> For the better part of a decade, key researchers and leading national organizations have collaborated on scholarly communication, open access, digital publishing, data management, knowledge mobilization, social knowledge creation, and community engagement—laying the foundation for open social scholarship. Growing from such roots, as well as contemporary online practices, open social scholarship enables the creation, dissemination, and engagement of research by specialists and non-specialists in accessible and significant ways. This work is guided by objectives consensually developed by the INKE Partnership: to create and share knowledge, communicate scholarship, engage relevant policy, connect with publics, and research and develop open digital scholarship initiatives.

CAPOS is a collaboration between Canadian and Australian researchers, policy makers, libraries, computing organizations, research groups, and postsecondary institutions to advance the understanding of—and resolve crucial issues in—the production, distribution, and engagement of open, digital scholarship. This partnership capitalizes on both countries' positive track records of participating in, engaging with, and influencing the international consideration of open, digital scholarship issues. CAPOS works toward implementing elements of open scholarship policy and practice from the international sphere in national, regional, and local contexts—

made doable based on a complementarity of governmental and academic institutional structures and legal frameworks in Canada and Australia. Moreover, there are over 700 formal and informal inter-university agreements between the two countries according to the Australian High Commission (n.d.). In sum, CAPOS aims to make open, digital scholarship more efficient and more impactful for Canada and Australia.

INKE Partnership and CAPOS goals and objectives run through this special issue, and the 12 articles included can be grouped into the following categories: **Digital Scholarship in Action**; **Community Engagement**; and **Open Scholarship Learnings and Recommendations**. These categories are representative of key elements of open social scholarship. Many authors discuss projects or studies they are undertaking in the open digital context, from design to iteration to production. Others reflect on community-based engagement around open digital materials, or else community-developed materials that are picked up by researchers for their own work. Some authors also provide suggestions for future open scholarship initiatives based on their extant research and experiences. The first grouping, **Digital Scholarship in Action**, brings together authors who share their current research and development work either as individuals or in collaboration. [Constance Crompton with Lori Antranikian, Ruth Truong, and S. Paige Maskell](#) introduce the Linked Familiarity project, which uses Wikidata to track people, subjects, and domains in the first ten editions of the 19th century Bartlett's Familiar Quotations. [Bernardo Bueno](#) reflects on the creation of the open access journal *Scriptorium*, and its role in the larger field of creative writing in Brazil. Also writing in the world of open access publishing, [Luis Meneses](#) discusses the possibilities of integrating a search engine that ranks its results according to trends in social media with large-scale open access repositories. Broadening out from a focus on publications, [Caroline Winter, Meneses, Tyler Fontenot, Alyssa Arbuckle, and Ray Siemens](#), with the ETCL and INKE research groups, explore the research foundations for the Canadian Humanities and Social Sciences Commons, an online network for research collaboration, dissemination, and discovery. Taking a social sciences approach, [Lynne Siemens](#) describes a study on connecting research workspaces via video. She presents her findings on the challenges of such a setup, as well as the benefits for team building and collaboration.

The second cluster, **Community Engagement**, presents work that explicitly connects those working in the academy with those who identify as academic-aligned or non-academic. [Roowether Mabuya, Dimikatso Mathe, Mmasibidi Setaka, and Menno van Zaanen](#) discuss the challenges of working with digital language resources in South Africa—in no small part because South Africa is the home to 11 official languages—and outline the efforts of the South African

Centre for Digital Language Resources in this domain. Moving to the Canadian prairies, [Jon Bath and Michael Peterson](#) present the Sharing Spaces project, an initiative that explores augmented reality arts experiences for varying communities in Saskatchewan. They discuss the context and development of their first prototype in this project, as well as reiterate the centrality of community needs to the project as a whole. [Tully Barnett](#) explores the challenges of public-private partnerships in the realm of digitizing and making public textual works. Drilling into concepts of partnership, [Lynne Siemens](#) casts her eye to the INKE Partnership itself, and explores its formation as a collaboration between university researchers, librarians, and academic-aligned organizations.

The final set of papers, **Open Scholarship Learnings and Recommendations**, takes on current trends and issues in open scholarship and suggests possible solutions for moving forward. Working in the United States, [Verletta Kern and Madeline Mundt](#) outline the steps taken to envision a library-based Open Scholarship Commons at the University of Washington. Notably, their ideation process was shaped by three key concepts: learning organizations, design thinking, and open leadership. In the spirit of sharing research outcomes more broadly, [Alyssa Arbuckle](#) looks to the health and social sciences for knowledge translation mechanisms that could be implemented in the humanities as well. Finally, [Jon Saklofske](#) looks to game studies as a possible model for open social scholarship, with an emphasis on hybrid publications like *First Person Scholar* and YouTube video blogger-critics such as Noah Caldwell-Gervais.

As the contributions included in this special issue demonstrate, there are various open social scholarship paths to build and explore. CAPOS and INKE Partnership members, working from their own unique contexts, are investigating and experimenting with many options for the creation, dissemination, and preservation of open, digital scholarship. Learning about, reflecting on, engaging with, and undertaking open social scholarship are all critical for the development and sustenance of this type of activity in the 21st century and beyond.

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Notes:

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- . See <https://inke.ca> for more information on these groups. ↩
- . For the proceedings from previous gatherings see Arbuckle, Meneses, and Siemens 2019; Meneses, Arbuckle, and Siemens 2019; Huculak 2019; Arbuckle, Christie, Siemens, et al. 2016; Arbuckle, Mauro, and Siemens 2015; Arbuckle, Crompton, and Mauro 2014. ↩

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