# Critical textual analysis of key open education texts

This document is the full 9000 word textual analysis developed by Sarah Lambert in the preparation of a journal paper investigating the extent to which open education is aligned to a definition of social justice, and the impact of technological deterministic approaches. The texts chosen span 2002-2015 covering the recent digital chapter of open education from the first Open Education Resources (OER Declaration until after the impact of the MOOCs. Definitional debates about what openness is or should be have been intense throughout, but moved through three phases: foundational, broadening (to include Open Education Practices or OEP) and Appropriation (from commercial publishers and MOOCs.) The three phases used to structure the analysis and text selection are:

* Foundation phase texts: 2002 - 2012
* Broadening phase texts: 2009-2017
* Appropriation and identity crisis phase texts: 2011-15

The motivation for research is the question - where is the social justice in open education (discourse, action, literature)? And if researcher-practitioners are not talking about social justice in their published works, what are they talking about?)

Starting with OER and OEP, the analysis unpicks the shifting values, presences and absences that underpin them. The centrality of the free/freedom debate is tracked, which intensified due to the appropriation of the term “open” by commercial MOOC providers from 2012. The analysis problematizes these developments and some of the responses to them regarding reclaiming “openness” in terms of unintended watering down of the social justice agenda.

The focus on reclaiming ‘openness’ is problematized as relying on technological-determinist arguments which may be more a part of the problem than a solution. The development of the terms OEP is problematized as broadening the scope of open education into the area of digital literacies, at the expense of the social-justice agenda.

The development of the term open education is problematized as focussing on the surface-features or strategies to operationalise work. The overall effects is that our key terms continue to focus on the “what” or surface features of the practice as the expense of the values, purpose ie the “why” of open education.

**Definition as analytic lens**

In this research I adopt the definition of social justice adopted from the work of Nancy Fraser and synthesised by Keddie (Fraser, 1995; Keddie, 2012) for contemporary education contexts as "a process and also a goal to achieve a fairer society which involves actions guided by the principles of *redistributive* justice, *recognitive* justice or *representational* justice.”

*Redistributive justice* involves allocation of material or human resources towards those who by circumstance have less, *recognitive justice* involves respect and recognition for cultural and gender difference, and *representational justice* involves equitable representation and political voice.

The three different accounts of technological determinism (Oliver, 2011) I looked for in the appropriation phase textual analysis are:

1. Affordance: overemphasising or attributing the power for social change (ie in this case, improvements in education) to the general decontextualized properties or “affordance” of a technology, particularly to promote the uptake of a technology by others. The affordance account obscures socio-cultural context and difference, underplays the social context in which the technology is deployed which impacts the usage and outcome, such that the possibility of transplanting cases across contexts is presented more optimistically where in reality it is much more difficult and in some cases not possible where contexts diverge (Oliver, 2011; Selwyn, 2011).
2. Normative: the discourse about efficiency and productivity of technology become so dominant that the act of asking ethical questions about use or exploring other accounts leaves the questioner marginalised (Oliver, 2011).
3. Reification: the formalisation and abstraction of practice so that it can be shared, where the process tends to simplify and calcify dominant understandings to the detriment of alternative possibilities (Wenger, 1998).

The textual analysis begins on the next page after the references to literature used in this introduction. There is one table for each of the three periods 2002-2015, and there are one or more rows for each key text analysed. The left-hand column of the table presents an excerpt of the key text that highlights the purposes ascribed to open education. The right -hand column analyses the themes of the purpose, and notes any direct or implied alignment with social justice principles.

The synthesis and discussion of this analysis was published in the Journal of Learning for Development (Lambert, 2018) and 2 additional texts were added and analysed in response to the peer review process. The process of text selection is discussed in the methods section of the paper.

**References**

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Keddie, A. (2012). Schooling and social justice through the lenses of Nancy Fraser. *Critical Studies in Education*, *53*(3), 263–279.

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## OER and Open Education: key “Declarations” and definitions (foundation phase texts) 2002-12

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| **Source text (reference and actual text excerpts)** | **Analysis** |
| 2002 UNESCO OER announcement and definition  UNESCO. (2002). UNESCO promotes new initiative for free educational resources on the Internet. Retrieved December 15, 2017, from http://www.unesco.org/education/news\_en/080702\_free\_edu\_ress.shtml  UNESCO promotes new initiative for free educational resources on the Internet  Original text  “July 8, 2002 - Open Educational Resources are **critically important** for ensuring wide access to quality higher education **in developing countries** and full **participation of universities in these countries** in the rapidly evolving world higher education system, said the participants of the UNESCO Forum on the impact of open courseware for higher education in developing countries in Paris last week.  The sixteen principal participants from universities in developing and industrialized countries and representatives of six international and non-governmental organizations express in the declaration adopted by the Forum their wish to develop together **a universal educational resource available for the whole of humanity**, to be referred to henceforth as Open Educational Resources.  Open Educational Resources are defined as "technology-enabled, open provision of educational resources for consultation, use and adaptation **by a community of users for non-commercial purposes**.” | This text describes developing and industrialised universities This text describes a significant meeting of interested parties to propose that open-courseware/OER such as that developed by MIT ie industrialised country to be shared and used by and for Higher Education in developing countries – is clearly an action of *redistributive justice* from those with greater resources to those with fewer. Note the urgency of the tone “critically important…”The addition of the phrase with the “full participation” of those countries – is clearly an action of *representational justice*. The phrase which talks about “consultation, use and adaptation by a community of users for non-commercial purposes” implies a degree of recognitive justice in the way different cultural and linguistic communities of the developing world are expected to adapt the global north (implied, English language resources) to suit their needs, although it is not as clearly aligned as the other 2 principles. The phrase “a universal educational resource…for the whole of humanity” in this context acknowledges that currently only part of humanity are included in higher education and the goal and indeed the focus of efforts is to include learners from developing countries. However the final sentence which carries the definition: includes none of the social justice principles and none of the idea of marginalised learners – instead it ended up as highlighting the technology and leaving the word ‘open’ to carry the context: “technology-enabled, open provision of educational resources…by a community of users….” A community of users easily becomes any group of users. The headline that announced the declaration is therefore quite prescient: “UNESCO promotes new initiative for free educational resources on the Internet” |
| Couros, A. (2006). Examining open (source) communities as networks of innovation: Implications for the adoption of open thinking by teachers [Unpublished doctoral dissertation]. University of Regina, Regina, SK, Canada.  The Open Movement  “In 2003, Alec Couros initiated a two-year-long study that examined the perceptions, beliefs, and practices of educators who participated in free and open-source software (FOSS) communities (Couros, 2006)…. Participants identified strong tendencies toward collaboration, sharing, and openness in their classroom activities and through professional collaborations. Generally, these individuals identified themselves as part of a larger phenomenon, later defined as the “the open movement”: The open movement is an informal, worldwide phenomenon characterized by the tendency of individuals and groups to work, collaborate and publish in ways that favour accessibility, sharing, transparency and interoperability. Advocates of openness value the **democratization of knowledge construction and dissemination, and are critical of knowledge controlling structures.”** (Couros, 2006, p. 161) | Is collaboration and sharing always good? Is democratization of knowledge construction always good? These core ideas from the open-source movement strongly influenced OER and open education. Neither collaboration, sharing, or democratisation of knowledge (or education) are necessarily good in terms of social justice if the sharing and collaboration is primarily between Global north IT workers - some of the more privileged individuals on the planet. Who benefits from reducing the knowledge controlling structures of IT work? IT workers who can work more flexibly and have more control.  Lacks principles of *redistributive, recognitive or representational justice.* |
| Wiley’s 4Rs definition of Open Content  Note: The 4Rs were later expanded to be 5Rs with the addition of “retain” – the ability to own and archive.  Wiley, D. (2007). Open Education License Draft. *Iterating towards Openness Blog*. Retrieved April 1, 2018, from <https://opencontent.org/blog/archives/355>  “The Four Rs of Open Content  When I began promoting the idea of open content almost 10 years ago, there were four main types of activity I was interested in promoting (although it took me some time to get to the point where I could articulate them clearly). The four main types of activity enabled by open content can be summarized as “the four Rs”:  Reuse – Use the work verbatim, just exactly as you found it  Rework – Alter or transform the work so that it better meets your needs  Remix – Combine the (verbatim or altered) work with other works to better meet your needs  Redistribute – Share the verbatim work, the reworked work, or the remixed work with others  Notice how each of the first three Rs encompasses those that came before it. Reusing involves copying, displaying, performing, and making other uses of a work just as you found it. Reworking involves altering or transforming content, which one would only do if afterward they would be able to reuse the derivative work. Remixing involves creating a mashup of several works – some of which will be reworked as part of the remixing process – which one would only do if afterward they would be able to reuse the remix. (A “remix” in which no reworking is done is an anthology (a collection of simple reuses) and not particularly interesting for the purposes of this discussion.)  In the learning objects literature and elsewhere, endless problems have been caused by the fact that people say “reuse” when they actually mean “rework” or “remix,” or some combination of the first three Rs. This is a classic problem of imprecision; of talking fast and loose. Add to this difficulty the fact that each of these three Rs thrives under different conditions, and you’ve got a recipe for general confusion….” | Wiley’s background in open-source software influenced his approach and his “4Rs” list of “permissions of use” (ability to reuse, revise, remix, and redistribute) became the new de-facto definition of OER. At this level of granularity regarding legal and technical features of a digital resource however, the 4/5Rs “framework” or definition was *void of any of the keywords or principles of social justice.* Social justice is not present as either a goal or a process/action.  While the first R could possibly lead to redistributive justice, it is just as likely to not. At best, it has the potential to facilitate redistributive justice if the designer has that intention. The latter 3 Rs are only relevant if you have technical skills to make use of them, this text is part of a conversation between global north IT experts talking to other IT experts – as per Selwyn on the lack of diversity with open-source community *lacks any representational justice* within the process of digital resource creation.  The focus of Wiley’s work in the American College sector (ie the application of Wiley’s technical expertise) was aligned to social justice principles but this is not evident in the definitions texts which influenced many others. |
| The Cape Town Open Education Declaration. (2007). Retrieved September 12, 2016, from <http://www.capetowndeclaration.org/read-the-declaration>  “We are on the **cusp** of a **global revolution** in teaching and learning. Educators worldwide are developing a vast pool of educational resources on the Internet, open and free for all to use. These educators are creating a world where each and **every person on earth can access and contribute to the sum of all human knowledge.** They are also planting the seeds of a new pedagogy where **educators and learners create, shape and evolve knowledge together**, deepening their skills and understanding as they go.  This emerging open education movement combines the established tradition of sharing good ideas with fellow educators and the collaborative, interactive culture of the Internet. It is built on the belief that everyone should have the freedom to use, customize, improve and **redistribute** educational resources without constraint. Educators, learners and others who share this belief are gathering together as part of a worldwide effort to make education both more accessible and more effective.  …They (OER) contribute to making education more accessible, **especially where money for learning materials is scarce.** They also nourish the kind of participatory culture of learning, creating, sharing and cooperation that rapidly changing knowledge societies need.  However, open education is not limited to just open educational resources. It also draws upon open technologies that facilitate collaborative, flexible learning and the open sharing of teaching practices that empower educators to benefit from the best ideas of their colleagues. It may also grow to include new approaches to assessment, accreditation and collaborative learning. Understanding and embracing innovations like these is critical to the long term vision of this movement.  There are many barriers to realizing this vision. Most educators remain unaware of the growing pool of open educational resources. Many governments and educational institutions are either unaware or unconvinced of the benefits of open education. Differences among licensing schemes for open resources create confusion and incompatibility. And, of course, the majority of the world does not yet have access to the computers and networks that are integral to most current open education efforts….” | Note the urgency: “cusp of a global revolution”. But only the cusp, we are not there yet. Numerous barriers are noted.  The declaration describes a degree of broadening of the field away from a sole focus on social justice to include an interest in quality improvements in education generally. The redistributive idea and the distinction between developing and industrialised, rich/poor is lost we now have “educators worldwide” and “every person on earth”. One sentence in the latter part mentions OER being particular needed in places where “**money for learning materials is scarce”** followed by a sentence about collaborative and digital learning cultures needed for “changing knowledge societies” which speaks more to the wider discourse of eLearning and digital literacies.  Similarly the cultural recognition aspect is only there if you know to look for it, implied only in “educators and learners create, shape and evolve knowledge together”.  The principles of *redistributive, recognitive and representational justice are only implied, are extremely watered down.* |
| Paris OER Declaration 2012  “Noting that Open Educational Resources (OER) promote the aims of the international statements quoted above;  Recommends that States, within their capacities and authority:   1. Foster awareness and use of OER.  Promote and use OER to widen access to education at all levels, both formal and non-formal, in a perspective of lifelong learning, thus contributing to social inclusion, gender equity and special needs education. Improve both cost-efficiency and quality of teaching and learning outcomes through greater use of OER. 2. Facilitate enabling environments for use of Information and Communications Technologies (ICT). Bridge the digital divide by developing adequate infrastructure, in particular, affordable broadband connectivity, widespread mobile technology and reliable electrical power supply. Improve media and information literacy and encourage the development and use of OER in open standard digital formats. 3. Reinforce the development of strategies and policies on OER. Promote the development of specific policies for the production and use of OER within wider strategies for advancing education. 4. Promote the understanding and use of open licensing frameworks.Facilitate the re-use, revision, remixing and redistribution of educational materials across the world through open licensing, which refers to a range of frameworks that allow different kinds of uses, while respecting the rights of any copyright holder. 5. Support capacity building for the sustainable development of quality learning materials.  Support institutions, train and motivate teachers and other personnel to produce and share high-quality, accessible educational resources, taking into account local needs and the full diversity of learners. Promote quality assurance and peer review of OER. Encourage the development of mechanisms for the assessment and certification of learning outcomes achieved through OER. 6. Foster strategic alliances for OER. Take advantage of evolving technology to create opportunities for sharing materials which have been released under an open license in diverse media and ensure sustainability through new strategic partnerships within and among the education, industry, library, media and telecommunications sectors. 7. Encourage the development and adaptation of OER in a variety of languages and cultural contexts.  Favour the production and use of OER in local languages and diverse cultural contexts to ensure their relevance and accessibility. Intergovernmental organisations should encourage the sharing of OER across languages and cultures, respecting indigenous knowledge and rights. 8. Encourage research on OER.  Foster research on the development, use, evaluation and re-contextualisation of OER as well as on the opportunities and challenges they present, and their impact on the quality and cost-efficiency of teaching and learning in order to strengthen the evidence base for public investment in OER. 9. Facilitate finding, retrieving and sharing of OER.  Encourage the development of user-friendly tools to locate and retrieve OER that are specific and relevant to particular needs. Adopt appropriate open standards to ensure interoperability and to facilitate the use of OER in diverse media. 10. Encourage the open licensing of educational materials produced with public funds.  Governments/competent authorities can create substantial benefits for their citizens by ensuring that educational materials developed with public funds be made available under open licenses (with any restrictions they deem necessary) in order to maximize the impact of the investment.” | This Declaration is not a definition, but a call to action, and in particular *a call to social justice actions. I*t calls on the international education community to do 10 things to progress OER but it is clear in its preamble that it frames OER as action towards social justice as expressed in a list of 9 international declaration or legal conventions towards equality, cultural recognition and social inclusion as human rights.  It is clear about the focus of the effort towards marginalised learners, and avoids rhetoric about “everybody”.  Words some as “Bridge the digital divide” and “favour the production of….” Are talking of redistributing time and resources towards the more needy – a *redistributive* justice approach.  The first and second actions regarding using OER to widening participation and reduce digital exclusion of marginalised learners both meet the definition of *distributive* and *recognitive* justice.  The seventh action speaks directly to both *recognitive and representational justice* regarding favouring production of OER in local languages and respecting indigenous knowledge and rights.  Other actions are about developing related functions in support of action: staff capacity, education, policy, partnerships, research, technical frameworks.  The *social justice details of the declaration do tend to be lost*  *if one scans or cites only the headings* as the content, then we get back to the purposeless and potentially deterministic “foster awareness and use of OER” - as if it is an end to itself which assumes that from more OER (of any type) justice or equality will naturally follow. |
| First literature review of OER (Wiley, Bliss and McEwan, 2014). While published in 2014, it covers and literature from the 2002-2013 period and acts as a consolidation of the definitional issues of the foundation period.  Wiley, D., Bliss, T. J., & McEwan, M. (2014). Open Educational Resources: A Review of the Literature. In M. J. Spector, J.M., Merrill, M.D., Elen, J., Bishop (Ed.), *Handbook of Research on Educational Communications and Technology* (4th ed., pp. 583–590). Springer. https://doi.org/10.1007/978-1-4614-3185-5  From the abstract: “Neither the term “open educational resources” nor the term “open” itself has an agreed upon definition in the literature. Research regarding open educational resources focuses on methods of producing OER, methods of sharing OER, and the bene fits of OER.”  From the benefits of OER section:  “Education institutions have mixed incentives for engaging in open educational resources initiatives (Smith, 2009) . Some of these incentives are mission-aligned. Hylén (2006) and D’Antoni (2009) provide good overviews of these mission- aligned motivations for producing and sharing OER, including the public outreach mission of publicly funded universities to educate the entire public whose funding supports their operation.  There are several self-interested reasons institutions, and faculty choose to create and share open educational resources that may or may not articulate clearly with the mission of the institution. The majority of the benefit claims in the literature fall into this category. For example, Caudill (2011) claims that access to OER makes the course development process quicker and easier—a claim that is echoed elsewhere (e.g., Hylén, 2006).”  This literature review provided something of a reality-check to the claims about the potential of OER. While noting a “small but growing body of evidence …substantiating claims made by proponents of OER”, there was also recognition of the barriers common to the literature: the discovery problem, the sustainability problem, the quality problem, the localization problem, and the remix problem (Wiley, Bliss, & McEwan, 2014). | Hopes for the potential of *distributive justice* tempered by the reality that 12 years after OER was launched (UNESCO 2002), using free digital materials for global north education is still dominant and re-use via technical editing and open licencing (ie OER)- the justification of the 4R/5Rs and the domain of the IT expert – has not gained traction. Legal licencing “poorly understood,” more traction for speeding up mainstream course development. In terms of habitus and identity, perhaps just not what educators consider their core business. I think it is likely that there is not enough interest or understanding from mainstream educators about recognitive or representational justice actions for this aspect of social justice to drive OER re-use or co-creation with and for marginalised groups.  Hence at the time of the review, *all three types of social justice* are still unrealised potential of OER. Clinging to 5Rs as the way to bring about fairer education without a driving social justice purpose from educators seems futile. |

## OEP, Continuums and OER enabled pedagogy: broadening the scope of work (broadening-phase) 2009-17

“However, open educational resources are also influencing neighboring areas of educational research and these crossover efforts are likely to play an important role in future research. Two areas that merit particular attention include open education policy and open assessment.” (Wiley, Bliss, & McEwan, 2014, p. 787)

In this broadening phase, open education begins to blur with more mainstream education. The Wiley et al first literature review (noted in the table above) flags this as a blurring of boundaries via influence of neighbouring areas of research. Although the authors nominate open education policy and open assessment as where they predict the overlaps may appear, from the vantage point of 2018, open education research and practice actually overlapped more with general technology enhanced learning (TEL) and digital literacies as the following data show.

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| **Source text (reference and actual text excerpts)** | **Analysis** |
| First continuum of openness  Hodgkinson-Williams, C., & Gray, E. (2009). *Degrees of Openness: The emergence of Open Educational Resources at the University of Cape Town.* International Journal of Education and Development Using ICT, 5(5), 101–116. Retrieved from <http://ijedict.dec.uwi.edu//viewarticle.php?id=864>  Hodgkinson-Williams 2009 paper introduces sliding scales of openness three dimensions of openness: social, technical, and legal. | While these continuums reflect a more mature understanding of the challenges and complexities of working with academics to create and use OER, the notion of the social justice aims underpinning why such work is undertaken - is somewhat assumed and hidden from view.  If however, one takes as given the context of driving social justice mission within all South African educational institutions (where overcoming the inequality legacy of apartheid is everybody’s business) then this continuum could be seen to provide an alternative to the dominant normative form of technological determinist view that the legal “freedoms” of the 4Rs/5Rs will afford change. Hodgkinson-Williams and Grey’s continuum puts the social context on the map as impacting outcomes as much as the technical and legal domains. |
| OEP definition introduced, an outcome of the OPAL report ‘Beyond OER: Shifting Focus from Resources to Practices’.  Ehlers, U.-D. (2011). Extending the Territory: From Open Educational Resources to Open Educational Practices. *Journal of Open, Flexible and Distance Learning*, *15*(2), 1–10. Retrieved from <http://journals.akoaotearoa.ac.nz/index.php/JOFDL/article/view/64>  Definition sentence, Open Educational Practices (OEP): “Support the (re)use and production of OER through institutional policies, promote innovative pedagogical models, and respect and empower learners as co-producers on their lifelong learning path” (Ehlers, 2011, p. 4).  "The Open Educational Quality Initiative Report..., came to the conclusion that open educational resources (OER) in higher education institutions are, in principle, available but are not frequently used (OPAL, 2011)." pg 1  "Although OER are high on the agenda of social and inclusion policies, and are supported by many stakeholders in the educational sphere, their use in higher education has not yet reached a critical threshold… Low use is because past (and largely also current) focus in OER is on building more access to digital content. There is too little consideration of whether access alone will support educational practices and promote quality and innovation in teaching and learning." pg 2 | *Social justice is largely absent in any form*, and where it is – it is with regard to social inclusion agenda/policies ie a goal. This report and particularly the OEP definition sentence (perhaps inadvertently) promotes the broadening education innovation and quality agenda. “Respect and empower learners as co-producers on their lifelong learning path” *may imply representational justice* but this is only the case if we are talking of fixing the misrepresentation of the marginalised, which is not discussed at any point.  *Social inclusion agenda/policies* – mentioned only in one sentence in the introduction and again one sentence in the conclusion (framed as potential for assisting social inclusion) but does not mention it again in the whole body of the paper. *OER as social inclusion actions are not discussed at all.* Indeed another reality check for OER and social inclusion “OER….are, in principle, available but are not frequently used…Although OER are high on the agenda of social and inclusion policies…. Their use in higher education has not yet reached a critical threshold.”  The paper suggests that improving the quality of OER via more open educator practices will fix the uptake, and the assumption is that fixing the uptake will meet the “agenda of social and inclusion” policies. There is an assumption therefore that increasing OER uptake counts as a social justice/social inclusion action, due to conflating access with social justice – which is neither theoretically correct nor empirically true. Access and social justice are theoretically and definitionally different. In more recent MOOC empirical studies open access benefits the already privileged rather than the marginalised. |
| Beetham, H., Falconer, I., Mcgill, L., & Littlejohn, A. (2012). *Open Practices: a briefing paper*. *JISC briefing paper*. Retrieved from https://oersynth.pbworks.com/w/page/51668352/OpenPracticesBriefing  Ehlers’ model was extended and teased out by Beetham et al to produce a list of OEP that included OER, “open pedagogies” , “open learning”, “open scholarship”, “open sharing”, and “use of open technologies”.  Students benefits section:  “The most obvious benefit of open learning resources is that students are free to study in a wide range of settings. This can help overcome problems with access, or can mean that learning in the field, the workplace, or on placement is enhanced by access to relevant content.  Use of open educational content, whether guided by teaching staff or self-directed, exposes learners to a wider range of ideas, media, representations, and conceptual approaches than a closed course can provide… Releasing sample OERs as an aspect of course marketisation – a growing trend – allows students to make meaningful choices between choosing what and where to study and when they are choosing options within their programme." | Definition shows the broadening of the field. *Social justice principles not present in this paper.* In the section about benefits of OEP headed "Why engage in open educational practices?" institutional benefits then higher education staff benefits are emphasised first and second, with student benefits noted third. Student benefits are noted as free access to learning as a general benefit to all, improvements to learning outcomes relating to self-directed information search/research literacies and information diversity, and informed course selection. |
| Siemens, G. (2015). The role of MOOCs in the Future of Education. In C. Bonk, M. Lee, T. Reeves, & G. Siemens (Eds.), *MOOCs and open education around the world* (pp. xiiv–xvii). New York and London: Routledge.  Summary with quoted phrases: MOOCs as meeting a need for a significant rise in regular, ongoing, lifelong learning underpinned by rapidly changing societies (Siemens, 2015). People and societies are connected by technology, and both society and technology are changing rapidly. According to Siemens, 4 years of college or university is not enough. Quoting Keppell in a later chapter in the book, people are involved in "learning, constant learning" throughout their lives. The internet, mobile devices and people's desire to connect and share have created massive amounts of information online, and we daily search for and find it. In other words, informal learning is significantly on the rise. In this context, Siemens notes that digitisation of all parts of our lives is also a significant driver towards using technology to learn. He argues that MOOCs are not the trend, but a response to these trends. He says that "MOOCs reflected trends rather than drove them, notably the growing range of knowledge and learning needs of individuals, in a society experience rapid, almost violent change."  He argues that "MOOCs are not the critical trend; on the contrary, it is the complexification and digitisation of higher education that is the alpha trend." | Reflects the ideas in OEP regarding digital literacy and lifelong learning are the alpha trend or more important phenomena than MOOCs (where MOOCs are representative of the latest expression of open education). If online learning and digital literacy for lifelong learning are the most important needs- how is the challenge of developing these different to the challenges of eLearning or online learning? *Principles of social justice not mentioned.* |
| Butcher, N. (2015). A Basic Guide to Open Educational Resources (OER). Retrieved from http://unesdoc.unesco.org/images/0021/002158/215804e.pdf  page 6, section headed Is OER the same as open learning/open education?  “Although use of OER can support open learning/open education, the two are not the same. Making ‘open education’ or ‘open learning’ a priority has significantly bigger implications than only committing to releasing resources as open or using OER in educational programmes. It requires systematic analysis of assessment and accreditation systems, student support, curriculum frameworks, mechanisms to recognize prior learning, and so on, in order to determine the extent to which they enhance or impede openness.   Open learning is an approach to education that seeks to remove all unnecessary barriers to learning, while aiming to provide students with a reasonable chance of success in an education and training system centred on their specific needs and located in multiple arenas of learning.   It incorporates several key principles:  • Learning opportunity should be lifelong and should encompass both education and training;  • The learning process should centre on the learners, build on their experience and encourage independent and critical thinking;  • Learning provision should be flexible so that learners can increasingly choose, where, when, what and how they learn, as well as the pace at which they will learn;  • Prior learning, prior experience and demonstrated competencies should be recognized so that learners are not unnecessarily barred from educational opportunities by lack of appropriate qualifications;  • Learners should be able to accumulate credits from different learning contexts;  • Providers should create the conditions for a fair chance of learner success. (Saide, n.d.)   As this list illustrates, while effective use of OER might give practical expression to some of these principles, the two terms are distinct in both scope and meaning.” | Butcher’s 2015 Open Education definition talks about removing barriers to learning and addressing assessment and accreditation which can be viewed as redistributive justice.  Shows influence from the field of *widening participation, there is some alignment with the redistributive justice principle*.  Shows influence of a maturing widening participation literature in that it goes beyond concepts of access to those of participation and also to say that institutions also need to provide students with a “reasonable chance of success in an education and training system centred on their specific needs and located in multiple arenas of learning.” (Butcher, 2015) |
| dos Santos, A. I., Punie, Y., & Muñoz, J. C. (2016). *Opening Up Education: A Support Framework for Higher Education Institutions* (EUR 27938). Seville, Spain: European Union. Retrieved from <http://publications.jrc.ec.europa.eu/repository/bitstream/JRC101436/jrc101436.pdf>  Definition - “open education is seen as:  a way of carrying out education, often using digital technologies. Its aim is to **widen access** and **participation** to everyone by removing barriers and making learning accessible, abundant, and customisable for all. It offers multiple ways of teaching and learning, building and sharing knowledge. It also provides a variety of access routes to formal and non-formal education, and connects the two.”  Introduction excerpt: The rationale or purposes for Open Education is noted as “an important item on the European policy agenda for many reasons. First, it can help to reduce or remove barriers to education (e.g. cost, geography, time, entry requirements). This gives learners the opportunity to up skill or re-skill at a lower or nearly no cost, and in a flexible way - important considerations in the economic crisis faced by Europe today. Second, it supports the modernisation of higher education in Europe, since contemporary open education is largely carried out via digital technologies. Finally, it opens up the possibility of bridging non-formal and formal education. This can take place if HE institutions and other accredited institutions recognised the credentials they each issue to learners. A lot still needs to be done for open education practices to become a strong tool for social and economic development. There needs to be a strategic opening up of education by higher education institutions if they are to address some of the social issues that are important for Europe at the moment, such as enhanced workforce skills, access to job opportunities and personal growth of citizens.” (page 10) | Shows influence from the field of *widening participation*.  Another broadening approach is also evident in the 2016 European Union Science report (dos Santos, Punie, & Muñoz, 2016) which proposes 10 dimensions of Open Education (see Figure .)  The breadth of the 10 dimensions are problematic however, as they render the model indistinguishable from any number of educational policy and project implementations. Also problematically for the model as another de-facto definition of Open Education, is that *social justice is not in that image, only its weaker proxy “access”.* This is weaker in terms of social justice than the written definition which at least has widening participation in its aim (as well as widening access.) Social justice aims are also only briefly mentioned in the introduction to the report.  Therefore, a *limited version of social justice via the principle of redistributive justice* is in the report. However, social justice principles are absent from the simpler and easier to reference definition and the visualisation which reifies the “access” dominant discourse. |
| Wiley on OER-Enabled Pedagogy  Wiley, D. (2017). OER-Enabled Pedagogy. Retrieved July 4, 2017, from <https://opencontent.org/blog/archives/5009>  For some OER advocates, the broadening of practice embodied in OEP took the emphasis away from the freedoms/5Rs definition of OER. From 2013 onwards Wiley responded by embracing a new term: “OER enabled pedagogy is the set of teaching and learning practices only possible or practical when you have permission to engage in the 5R activities.” | Wiley provides only a definition in relation to his previous 5Rs definition.  This is a response to the way OEP had broadened the field towards constructivist online learning, and getting away from what was seen as its foundational principles.  This was an attempt not so much to resolve the OER/OEP debate but to acknowledge it and to take a considered position in the light of the debate. Wiley coined the term and to differentiate his work from OEP while acknowledging the usefulness of such work.  However, rather than express a new definition in terms related to social justice values, it again took a technical and legal fine-grained view.  In terms of social justice this definition has the same problems as before – social justice principles are lost in the hidden context and actions that Wiley and his projects engage in, but the blog itself which is the communication platform and source of citation lacks any of the social-justice principles in the provided definitions. |
| Cronin, C. (2017). Openness and praxis: Using OEP in Higher Education. Retrieved April 2, 2018, from https://www.slideshare.net/cicronin/choosing-open-oeglobal-openness-and-praxis-using-oep-in-he  Cronin’s PhD research builds on Ehlers definition. This conference presentation – an early view of her (soon to be published PhD) has a working definition of OEP that is: “collaborative practices that include the creation, use and re-use of OER and pedagogical practices, employing participatory technologies and social networks for interaction, peer learning, knowledge creation and sharing and empowerment of learners.”  Cronin also presents a “Interpretations of open” visual representation in the form of a continuum with a yellow line delineating the edge of territory in the definitional debates between OER and free digital resources.  Continuums such as Cronin’s *interpretation of open* appear to want to calm the OER/OEP debate by taking an inclusive approach by broadening the field, they assert that the broadest spectrum of workers are on the map of legitimate openness. It shows OER and OEP not as competing but as an extension of one another and therefore each a viable “interpretation of ‘open.’ | While social justice principles are not explicitly present, the inclusion of “employing participatory technologies and social networks for interaction, peer learning, knowledge creation and sharing and empowerment of learners” *starts to imply the possibility of some form of recognitive justice* – but like both Ehlers and Beetham et al’s definitions of OEP that came before this also lacks any concept of the importance of doing so as an action for remediating differential opportunity between learner groups. In that way Cronin’s definition aligns with only *half of the concept of recognitive justice.* Unfortunately, all of these OEP definitions leave open the very real possibility of further empowering the already privileged so they may take their place as future leaders, thus *further propping up current societal inequality.*  Regarding the continuum: on the one hand, Cronin provides a counter narrative to the normative or dominant account that OER is legitimate “open” work and OEP is less legitimate. For a field espousing inclusivity, reducing the “us” and “them” camps seems important work.  But on the other hand the visualisation may also be seen to reify a normative technological determinist view that free digital resources are not legitimate OER, but that anything based on 4/5Rs affords change. This (along with many other normative accounts of 4/5Rs OER affordance) could reinforce the silencing of alternative accounts where free learning materials might effect redistributive justice forms of social justice for marginalised learners. The question for social justice of OER is not “what is this thing” ie OER but “who does this thing actually benefit” or more specifically, “to what extent does this thing benefit marginalised learners?” |

## Commercial MOOCs and the drive to reclaim openness (appropriation and identity crisis phase) 2012-15

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| **Source text (reference and actual text excerpts)** | **Analysis** |
| Wiley, D. (2012). 2017: RIP, OER? Retrieved April 3, 2018, from https://opencontent.org/blog/archives/2177  Discusses the impact of publisher’s investment in supplementary resources as a threat to OER texts which are more traditional 90% text, 9% images and 1% video. Discusses the fear that if OER does not respond and invest in more up to date digital versions of their text-based resources, OER could be dead by 2017.  “You have to admit that some of the things the publishers are working on are both cooler and better than almost everything that currently exists in the OER space. Can you name a single OER project that does assessment at all (and I don’t mean PDFs of quizzes)? Can you name one that does diagnostic assessment or handles mastery in any meaningful way? …  Because this stuff costs so much to do, if no one steps up to the funding plate the entire field is at serious risk. Much has been written about 2012 being ‘the year of OER.’ Let’s hope it’s not the year OER peaks. We need brains, energy, and funding on the next gen OER/OAR problem NOW.” | The threat from commercial appropriation is discussed in terms of the relative appeal of text vs multimedia based educational resources. The threat/crisis of OER being dead by 2017 is raised, if the movement cannot respond.  The *use of OER for social justice is not discussed* – perhaps not considered, or is it just assumed that OER are social justice actions and commercial resources are not? |
| Lamb, B. (2013). Bold innovations in openwashing. Retrieved April 3, 2018, from <https://abject.ca/open-for-business/>  The blog post was in response to Udacity launching the "Open Education Alliance" and Audrey Watters tweets claiming appropriation of the term open.  “In any event, while a concept such as open source carries certain obligatory qualities, when we talk about education the application of “open” is more closely related to how ‘All Natural!’ or ‘New and Improved!’ are used on our supermarket shelves. It’s gotten to the point where I find myself hesitant to use a term like “open education” when I speak with people. And I wonder if I still want to be called an open educator.”  Clint Lalond's comment on the post is about making the parallel between greenwashing and openwashing while watching a documentary called "The New Green Giants" featuring interviews with the original 1960s organic food pioneers: "who, in the early years, struggled to do what they did out of the belief that it was the right thing to do.  Then big business came, bought out the early pioneers and organics became an industry… Organic became a marketing buzzword, and it wasn’t until laws were introduced by governments outlining strict guidelines for what could be labelled “organic” did the term begin to mean something again. But by that time, the damage had already been done to some extent, and many of the big foodcorps simply switched out the word organic for natural on many of their products – and no one really noticed.  … as I watched this doc, I kept having images of the faces of early pioneers of open education superimposed on the bodies of those early organic food producers. And a kind of sadness came over me as I watched the sincere earnestness of their youthful endeavours transform into jaded memories of how their movement was taken over as they were systematically forced out of the movement they started by their new slick corporate overlords.” | This post describes a crisis point of appropriation or “openwashing” where a number of commercial products and services from commercial textbook and MOOC providers use the term “open” to promote commercial offerings perceived to not be open. Lamb notes how the term “open” is used to market so many technology innovations that he is hesitant to use the term open education, and is not sure he wants to be called an open educator.  The comments string echo the crises of identity of open educators, and anger towards commercial appropriation of open education as practitioners are seen to be “systematically forced out of the movement they started by their new slick corporate overlords." There is also recognition of damage beyond notions of self that extends also to “the damage…done” to the field by limiting the work of the field to only that which is profitable. |

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| Weller, M. (2014). The Battle for Open: How openness won and why it doesn’t feel like victory. London: Ubiquity Press. http://doi.org/http://dx.doi.org/10.5334/bam  “Openness is everywhere in education at the moment” the opening sentence of the text.  Pg 3 The original advocates of open “are despondent about the reinterpretation of openness to mean ‘free’ or ‘online’  without some of the reuse liberties they had envisaged. Concerns are expressed about the commercial interests that are now using  openness as a marketing tool. Doubts are raised regarding the benefits of some open models for developing nations or learners  who require support. At this very moment of victory it seems that the narrative around openness is being usurped by others, and the  consequences of this may not be very open at all.”  “for many of the proponents of openness its key attribute is about freedom – for individuals to access content, to reuse it in ways they see fit, to develop new methods of working and to  take advantage of the opportunities the digital, networked world offers.”  Pg 16-17 “After the initial victory of  openness, we are now entering the key stage in the longer-term battle around openness. And this is not simply about whether we  use one piece of technology or another; openness is … in its most positive interpretation, it is the means by which **higher education becomes more relevant to society by opening up its knowledge and access to its services.** It provides the means by which higher education adapts to the changed context of the digital world.” | The “Battle” that Weller describes is the battle for control of Higher Education, and the fight between the idea of education as a greater good vs education as a saleable commodity. It’s not the battle for reducing inequality in education and society. *Social justice principles are absent.*  The response to the crisis of appropriation that it describes is to demand that openness changes to become something else, but there is no questioning of the power of openness for good (*normative account of technological determism*). The answer to the question posed about what something might look like if it was “very open” is not social justice – it is freedom for ed tech workers and making Higher Education more relevant.  This is a particular global north narrative about the freedom of educators and the struggle between universities vs corporations, asking who will determine the future of Higher education? Who or what is absent in this narrative is community, particularly marginalised communities, and their needs.  *Social justice principles are absent* from this particular notion (pg 16-17) of the future reshaping openness towards “its most positive interpretation” - of Higher Education becoming more relevant for society.  Why is making Higher Education more relevant the most we can hope for with openness?  Fetishizing openness – part of the political economy debate within theories of capitalism and originally from Marx’s “Capital” ie theory of markets causing changes in society, fetishizing the object ie technology occurs as a function of capitalism, when the subjects ie people and the value of people are downplayed in theories around who has the power to change society. This is the root of technological determinism theory.  This text fetishizes “openness” -as many others do, an example of a dominant technological determinist discourse that assumes “openness” can and will do the work of social justice. |
| Weller’s *The Battle for Open* (continued)  Weller describes the ongoing challenge to shape openness as replacing “open vs. closed with a set of more complex, nuanced debates, which may seem rather specialised.  For example:  • different approaches to MOOC pedagogy, so called xMOOCs vs. cMOOCs (we will address these in chapter 5)  • different licences, such as the more open Creative Commons CC-BY licence vs. the CC-NC one which restricts commercial use  • different routes to open access, the Gold vs. Green debate  • different technology options, for example centralised MOOC platforms vs. a distributed mix of third-party services  It is from these smaller debates that the larger picture is formed, and it is the construction of this larger picture that the remainder of this book will seek to perform.” | Like the 4/5Rs definitions, these questions  focus on surface features and ask us to debate these features of their application without considering the why we should do any of it, use any of them. The more important questions from a social justice perspective are different and look more like this:   * who do xMOOCs or cMOOCs benefit and in what circumstances? Or how can MOOCs be designed and delivered as actions of *redistributive justice*? * How can the different level of CC-licences enable different groups of learner challenges in different global contexts? Or how can free resources be designed for *recognitive justice* for marginalised communities and learners? * Who do non CC-By licenced free resources benefit and in what circumstances? * Who and what can be enabled by the different routes to open-publishing and in what circumstances? * Who and what can be enabled by the different types of open-technology platforms and providers and in what circumstances? |
| Weller’s *The Battle for Open* (continued)  Pg 19 “Like ‘fatfree’ or ‘diet’ in food labelling, ‘eco-friendly’, ‘natural’ or ‘green’ are labels that often hide other sins or are dubious in their claim. This is termed greenwashing…”  “1) Sin of the Hidden Trade-off  – whereby an unreasonably narrow set of attributes is used to claim greenness, without attention to other important environmental issues.” (Terra Choice 2010 quoted in Weller 2015). | Discusses different types of open-washing in detail via giving examples related to the various “sins” of greenwashing.  This is an interesting framework and from a social justice perspective, an alternative reading of the first “sin of the hidden trade-off” can be made:  While OE could be used to assist those who need it the most there are other barriers to reaching them and achieving this, so in reality OERs are most often used by educated and resourced people to assist the next generation of relatively well educated and resourced people. The trade-off here is that by accepting a definition of open that is about helping “everybody” we actually miss out on helping the people who most need help. |

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| Watters, A. (2014). From “Open” to Justice. Retrieved March 28, 2017, from http://hackeducation.com/2014/11/16/from-open-to-justice  Uses the example of open data to show why open does not equate to equitable or fair or just. She concludes with: "What happens when something is “open" in all the ways that open education and open source and open data advocates would approve. All the right open licenses. All the right levels of accessibility. All the right nods from all the right powerful players within “open.” And yet, the project is still not equitable. What if, in fact, it’s making it worse. What are we going to do when we recognize that “open" is not enough. I hope, that we recognize that what we need is social justice. We need politics, not simply a license. We need politics, not simply technology solutions. We need an ethics of care, of justice, not simply assume that “open” does the work of those for us." | Watters draws attention to the relationship between normative technical determinist views of open education (which I am calling open determinism) and the failure of open education to enact or provide for more equitable education.  “I hope, that we recognize that what we need is social justice. … (we can)not simply assume that “open” does the work … for us." |
| Moe, R. (2015). OER as online edutainment resources: a critical look at open content, branded content, and how both affect the OER movement. *Learning, Media and Technology*, *40*(3), 350–364. <https://doi.org/10.1080/17439884.2015.1029942>  “The recent proliferation of embedded online video content has resulted in a number of high-profile organizations and corporations producing and marketing content as open, to the objection of many educational scholars and practitioners….  Revolution is most often undertaken and fought by populations left out of the status quo, marginalized groups who throughout history have been unable to engage the dominant paradigm (hooks 1994). Critical theory is an academic field dedicated to providing voice and power through scholarship to these sub- cultures and stakeholders (Habermas 1989), opportunity for change without the violence of revolution…  By draping disruptive innovation into revolutionary terms for education (Christensen 2011), adherents to disruptive innovation are utilizing populist change rhetoric despite coming from a space of entrenchment, to the point their efforts mirror the openwashing of branded digital content, a disruptionwashing. This theory has been applied many times to branded digital content providers such as Khan Academy or various MOOC platforms (Hyman 2012), seeing this vision of online learning replacing existing modes of education based on potential ease and efficiency. In the case of branded digital content, it is the existing power structure driving the praise and press of this form of edu- cation. The founders and presidents ofMOOCproviders Udacity, Coursera and edX come from Stanford and MIT, schools with world-renowned recognition and substantial financial endowments. Coursera’s strategic plan for growth is to only partner with what it considers ‘elite’ institutions… | Discusses openwashing and “disruptionwashing” as a version of this based on over-use of the term disruptive innovation education.  Moe points out that the open education “revolution” has not been led by the excluded, but by big business.  While Moe *does not use the terms or principles of social justice explicitly* – he does say that the disruption and the innovation of the free but commercially branded video or MOOCs are dominant discourses that benefit the already powerful ie elite technology and education organisations. There is an understanding of the power and status differences between different groups in society – this is the foundation for understanding the need for social justice. |