# Open Education as Social Movement? Between Evidence-Based Research and Activism

4

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## Contents



**Abstract**

This chapter analyzes open education initiatives through the lens of social movement theory. Open education is introduced as a field with multiple dimensions, activities, and perspectives. Social movement theory is used to discuss along the dimensions of conflict and protest, cultural representation, values and collective action, and the influence of the social, political, and cultural context. Accordingly, epistemic communities are proposed as an alternative development direction for the field.

**Keywords**

Open education · Open educational resources · MOOCs · Social movement theory · Epistemic community · Research

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## Introduction

Open education has developed as an emerging field of research and practice in higher education. Building on the work of open and distance teaching universities, the field has launched several initiatives to open up higher education to learners outside of the educational institutions (Sabadie et al., 2014). The main patterns of work in the open education community in recent times have been related to open educational resources (OER) and massive open online courses (MOOCs). While the first theme focuses mainly on licensing questions of learning resources, the second theme concentrates mostly on open educational practices (OEP) in large-scale open online courses. Several citation analyses have shown that only a relatively weak connection exists between these two thematic communities of interest (Park & Shea, 2020; Weller, 2020; Weller et al., 2018). Furthermore, a recent study analyzed the commonalities and differences of implementation dynamics of OER and MOOC projects in Dutch higher education (Schophuizen et al., 2020), revealing some subtle but important differences when it comes to implementation strategies for open education in higher education.

The work on OER was initiated by the OpenCourseWare Movement and recently translated into a recommendation by UNESCO (UNESCO, 2019). The focus of the OER community has been on the publication of learning resources under an open license to allow the reuse and adaptation of (digital) learning resources. While in early stages of research on OER multiple forms of reuse were explored (Rensing et al., 2005), the prominent 5R framework is frequently used to discuss the dimensions of openness and reuse (Wiley, n.d.), covering five aspects of the use and development of OER: **r**etain, **r**euse, **r**evise, **r**emix, and **r**edistribute.

Research on MOOCs has focused mainly on challenges arising from large-scale openly accessible courses provided by (formal) higher education institutions (through open-source or commercial platforms) but used for nonformal learning by a variety of learners (Kalz & Specht, 2013). Prominent research questions in this subcommunity deal with design challenges for feedback and assessment (Joksimović et al., 2018; Kasch et al., 2021), self-regulated learning in open courses (Jansen et al., 2020), and last but not least, the fundamental question of how learning can be analyzed and success can be defined in this specific educational context (Henderikx et al., 2017; Rabin et al., 2020a).

Overall, the development of and research on open education is labelled as dynamic and multifaceted, more than just about OER and/or MOOCs (Zawacki-Richter et al., 2020). The underlying theoretical rationale is not without its criticisms, and more empirical evidence is needed in favor of open education. In an assessment of the OER research hub, Shear et al. (2015, p. 21) state that a "critical mass of high-quality and empirical OER research was not available [in 2012]," questioning the overall impact of activities around OER. Knox (2013) criticizes the missing educational concept or vision of OER, the strong emphasis on freedom leading to a devaluation of teachers and educational institutions and finally the unquestioned assumption of an independent and self-regulated learner. Edwards (2015) analyzes the discourse around openness in education and concludes that every definition of

openness also implies a definition of closedness and the value proposition surrounding this dichotomy. Bayne et al. (2015, p. 248) complain that the open education discussion "too often tended towards optimism, advocacy, and conviction." On the other hand, MOOCs have been criticized for not contributing to democratization of (higher) education (Hansen & Reich, 2015) and for favoring a dominant Western model of education and knowledge (Altbach, 2014).

Despite the tensions identified in the research themes, the term of "open education movement" was coined (Baraniuk, 2008; Conole & Brown, 2018; Farrow, 2017), suggesting a systematic and concerted body of activities around the opening of (higher) education with digital technologies. Weller (2014) even speaks of an "open movement," stressing the importance of involving activities far beyond the education sector. In this chapter, the existence of an "open education movement" will be analyzed from the perspective of social movement theory (SMT). An analysis will be conducted of the extent to which we can speak of open education movement as a social movement. While this question may seem to be purely academic, the intention is to show its relevance to the identity of the open education community and to help develop a stronger theoretical basis. In addition, some practical consequences of this question will be identified.

The chapter is structured as follows: In the next section, SMT is introduced as the theoretical lens through which open education as a scholarly community will be analyzed. Based on this theoretical foundation, a research framework will be proposed. This framework will then be used to analyze the discourse and activities pertinent to open education. Finally, results of the analysis will be discussed, and implications be drawn for future research and practices in the domain.

## Social Movement Theory

SMT is a sociological theory with the aim of understanding and explaining how social movements as collective actions of multiple individuals are formed, developed, and transformed. A working definition of social movements is provided by van Stekelenburg and Klandermans (2009, pp. 20–21) who define social movements as "interlocking networks of groups, social networks and individuals and the connection between them with a shared collective identity who try to prevent or promote societal change by non-institutionalized tactics." The authors provide a comprehensive overview of SMT and differentiate between structural approaches and social constructivist approaches to social movements.

Structural approaches to social movements study how the social and political context influences the establishment of social movements. Main research directions include the distribution of resources (resource mobilization) and the political environment. Resource mobilization research focuses mainly on internal processes of a social movement and puts less emphasis on grievances. This theoretical stance has been criticized for drawing its assumptions mainly from economic frameworks. Scholars focusing on the political environment of social movements look mainly at external factors influencing social movements. Their main assumption is

that social movements are adapting according to changes in political environments. In contrast, the new social movement (NSM) approach falls under the social constructivist approaches and deals with effects of modernization on marginalized groups of the society. Identity and the construction of identity by these groups are the core topic of this research direction which focuses on the perception and interpretation of material and sociopolitical conditions by individuals and groups. Reality, including threats and opportunities, is socially constructed from this perspective, and group identification plays an important role in the participation in social movements.

Della Porta and Diani (2015) summarize the common research interests of the field of social movement studies as follows:

1. "individuals critical of the status quo and prepared to engage in protest;
2. organizational forms intent on encouraging rank and file participation and bottom-up forms of deliberation;
3. public challenges to powerholders, often linked in chains of protest events;
4. actions providing goods to movement constituencies, and facilitating experimentation with alternative lifestyles" (pp. 4–5).

This summary shows that SMT consists of multiple perspectives to explain human action and social change. In this chapter, SMT will be used as a research framework to analyze whether and to what extent open education can be seen as a social movement. As a research framework, the guiding questions proposed by Della Porta and Diani (2020) will be employed and those four categories are applied to the open education theme. According to the authors, any study of a social movement needs to answer the following questions:

1. **Conflict and protest**: What are the underlying conflicts which open education focuses on? Do these conflicts change over time?
2. **Cultural representations**: What are the cultural representations used by actors in open education in the social conflict? How are problems in open education identified as objects for collective action? How are actors becoming involved in the collective action in open education? How are specific events recognized as part of the same social conflict? Where do cultures and values of open education come from?
3. **Values and collective action**: Which values, interests, and ideas get turned into collective action in open education? What are the mode and costs of this protest? How are the identities, symbols, emotions, organizations, and networks in open education perceived when explaining the initiation and persistence of the collective action? What forms do organizations take to maximize their strength and collective outcome?
4. **Influence of social, political, and cultural context**: How do social, political, and cultural contexts affect the success and forms of activities in open education? How does collective action work against holders of power? How is protest manifested and how does the form of protest change over time?

These questions can serve as a guiding framework to assess the extent to which open education can be perceived as a social movement as proposed earlier by researchers in the field.

## Open Education from the Perspective of SMT

### Conflict and Protest in Open Education

What are the underlying conflicts which open education is focusing on? One of the common themes of research and practice in open education is the joint *goal to increase access options to (higher) education with digital technologies*. In terms of conflicts, this notion can be connected to discussions around equality and fair allocation of chances to participate in education. Historically, a specific set of institutions such as open and distance teaching universities was established with the mission to allow flexible access to higher education and to offer options for the so-called "second chance" students, who did not have access to higher education in their initial education (Guri-Rosenblit, 1999). This *institutionalized widening of participation* in higher education has been later extended, via the open courseware movement and the publication of open educational resources, into opportunities to make use of resources from the formal educational system in a nonformal learning context (Sabadie et al., 2014). This central notion of increasing access has been later further extended via MOOCs but with more focus on access to learning opportunities than (reuse of) resources. Without focusing so much on the differences between these two types of activities, we can deduct that one of the central activities of open education is converting formerly inaccessible learning opportunities into public goods via the means of digital technologies.

Can we interpret this as a form of protest? According to Deimann and Sloep (2013), the origins of open education were rooted in dissatisfaction with and protest against the established educational system. This is also in line with earlier understanding of open education in which alternative pedagogical models in school education were subsumed under this concept. Van Mourik Broekman et al. (2014) mention several dimensions of protest underlying open education: protest against austerity, commercialization of higher education, unfair societal allocation of power and resources, and privatization of the public education sector. In this context, research attention has recently been directed towards social justice as a new paradigm for open education (Hodgkinson-Williams & Trotter, 2018; Lambert, 2018). Hodgkinson-Williams and Trotter (2018) approach the topic of social justice with regard to outcomes and processes of open education and a potential "economic maldistribution, cultural misrecognition and political misframing" (p. 207) and provide a wide range of contextual evidence on effects and needs from the context of OER. Lambert (2018) discusses social justice from the dimensions of redistributive, recognitive, and representational justice, and assigns exemplary activities to those categories for which a qualitative content analysis is conducted of 18 so-called "foundational texts."

It is an open question whether the sharing of resources, provision of access to open courses, or the analysis of social injustice in academic communities can be interpreted as an activity of protest against, for example, unfair distribution of chances to enter (higher) education and whether this activity is a sufficient sign of a social movement. In addition, if these actions take place only inside of academic communities, they mainly fall into the category of conventional actions in the taxonomy of protest developed by Caiani et al. (2012). In this taxonomy, five different levels of protest are differentiated ranging from conventional actions to violent actions. Conventional actions are the lowest level of protest and are represented by lobbying activities, for example. On a higher level are demonstrative actions which are represented by dedicated events and protest activities. Expressive actions address directly sympathizers outside of the social movement. Last but not least, two levels of aggressive actions form the highest level of protest involving illegal demonstrations and violence.

Social movements are, according to Della Porta and Diani (2020), different from other kinds of collective communities. The authors differentiate the so-called "epistemic communities" from social movements and point to the difference in key actors of these kinds of communities: "Epistemic communities involve actors usually endowed with decision-making power and certified knowledge" (p. 28). In this context, we would need to ask ourselves whether and how we include actors with no decision-making power and less certified knowledge into the discourse on open education.

## Cultural Representation

As discussed in the introduction, the cultural representation of the open education community centers around the provision of learning opportunities, either through the publication of resources or access to open courses. Mostly, either institutions or actors from public bodies are involved in publication of resources and development of open courses. The assumed "innovation direction" is here from institutions to an unspecified body of individuals as users of these resources (Rabin et al., 2020b). Much less focus has been on cultural representations which are not coming from institutions or which take other forms. The vast number of learning communities and self-help portals has been, for example, mostly ignored in the discourse on open education although they provide excellent contexts for a different type of educational scenario compared to the classical "course metaphor" (Borkman, 1999). These communities also practice some form of open education which has been widely ignored in the scholarly community. Extending the focus on this type of cultural representations would lead to a more inclusive approach for open education.

While it is a very valid discussion that learning resources financed via public money should be publicly available, the resource-centric perspective on the production of learning material neglects a large part of what education is about and also ignores the conditions under which learners are able to make use of this specific type of educational offer (Knox, 2013). Della Porta and Diani (2020) discuss the

production of public goods as a central activity of social movements but warn at the same time that these kinds of solutions do not "imply redistribution of power nor alterations in social structure, but focus instead on service delivery, self-help, personal and community empowerment" (p. 23). In this context, it is an open question whether the sharing of OER or the provision of access to open courses is sufficient to influence power structures or whether we do not put too much responsibility on the individual learner.

## Values and Collective Action

A third aspect of social movements relates to shared values and collective action. An unquestioned value of open education can be formulated as improving the provision of access to (higher) education for learners who do not have access to learning opportunities for whatever reasons (Kalz, 2014) or phrased differently as the reduction of structural constraints on education. Furthermore, openness has been used as a connector to combine activities in areas like research (open access), scientific practices (open science), or management (open policy) (Weller, 2014). Edwards (2015) provides some examples of potential values underlying openness and open education. He mentions, for example, the need to create more flexible educational careers to ensure employment as one of the motivations and values underlying open education or the accumulation of more cultural capital as a more consumption-oriented foundation of open education.

In terms of addressing and improving access issues to higher education, the focus on resources and course development can be very unspecific compared to dedicated programs for minority groups, for example. In this sense, the investment of resources into unspecific sharing activities might be less effective than a dedicated development effort which puts less emphasis on advocacy or training for licensing than on quality of resources and impact. Interestingly, these economic investment efforts for OER are only calculated, for example, in terms of cost-saving effects on the student side (Hilton III et al., 2014), but other economic and effectiveness dimensions are neglected. In this sense, a broader economic assessment of the investment in the development of open education would be needed which could provide a better picture with respect to effectiveness of interventions. By setting openness and licensing as a "holy grail" of open education, other potential interventions are ignored, potentially resulting in less equality.

Lane (2016, pp. 32–33) differentiates four layers for collective action in open education which all relate to emancipation:

1. "emancipation of people *through* education" whereby education can be a means through which individuals can understand and work against structural constraints in society.
2. "emancipation of learners and teachers *within* education," referring to overcoming restrictions which the current educational system applies (systematically) to learners and teachers.

3. "emancipation *of* education" which relates to the emancipation of education as a discipline, policy area, and practice from structural constraints.
4. "emancipation *from* organized education," enabling individuals to become self-regulated learners who can take away some structural constraints in the sense that learning will be possible without dependency on educational institutions.

All these dimensions are subject to collective action in open education and the discourse does often not differentiate between these dimensions and their implications.

### Influence of Social, Political, and Cultural Context

As a final dimension, one of the core questions for social movement analysis is the influence of the social, political, and cultural context on a social movement. The strong focus on property rights and alternative licensing options of OER can itself be regarded as a cultural reflex to set something against restrictive use of digital resources. Overall, the increasing commercialization and market-driven innovation of higher education infrastructures is another influencing factor which could motivate others to become an "open education supporter." The recent decision of the Massachusetts Institute of Technology (MIT) to sell one of the few remaining and largest MOOC platforms to a commercial company (MIT, 2021) is just another brick in the wall of a long history of institutional digital innovation projects which have later lost their open (source) direction and have been taken over by commercial companies. Williamson and Hogan (2021) provide a coherent collection of examples of the intensified commercialization of higher education during the Covid-19 pandemic.

Especially questions related to knowledge infrastructures and resource streams between the public sector and the open education space have not been sufficiently studied. Many assumptions about the replacement of parts of the higher education space with open education have not been met (Rabin et al., 2020b). While open education projects might start initially with the idea of an open knowledge infrastructure (Edwards, 2015; Kalz et al., 2020), these basic assumptions of the digital backbone for open education projects are often not sustained. In this context, we can see that open education can function as a double-edged sword: While striving for more openness in education and less (financial) barriers may result in an improvement on a short-term basis, the uninstitutionalized effort could lead in a longer term to unwanted outcomes such as privatization or the takeover of public infrastructure by commercial companies.

## Discussion

Open education as a multifaceted concept with many dimensions and topics is entangled in scholarly activities, advocacy activities, political discourse (especially around the UNESCO declaration on OER), and finally training and knowledge sharing activities. This complexity of activities and broadness, combined with an

inconclusiveness regarding the course of actions, target groups, problems to be addressed, and social benefits, contributes to a problematic identification of a real "center" of open education as a social movement.

While open education might be focusing on the surface *social conflicts*, the highly academic nature of discourse undermines the potential to involve other actors in the discourse. What is worthy of notice is the unclear picture of the stakeholders for which the open education scholarly community is working. Who are the specific marginalized and disadvantaged communities which are targeted with open courses, OER, and design approaches for social justice? A logical next step for the open education community would be similar to what the medical research community has realized over the course of the last 10 years. More and more researchers from this community do not talk about stakeholders but *with stakeholders*. Furthermore, many medical conferences engage patients in the academic discourse (Chu et al., 2016) and journals include patients on the editorial board (PatientsIncluded, 2016). For this purpose, a clearer picture of the stakeholders of open education would need to be developed and those stakeholders would need to be explicitly included in the discourse to move open education towards a social movement. This would imply that the disadvantaged learners and learners without access to educational opportunities would be enabled to contribute to the discourse on open education.

Currently, most activities do not contribute sufficiently to *protest* and do not seriously involve other parties in the discourse outside of academia.

The production of public goods as *cultural representation* is one of the central activities of open education with OER and open courses at the center mainly contributing to a reproduction of social norms within the higher education system. *Values* are shared on a high level (access and openness principles) while implications and tensions stemming from these principles are not sufficiently addressed and discussed. By stressing the importance of open and independent learning and publicly available resources, the community might unintentionally contribute to a neoliberal stance on lifelong learning (Barros, 2012) and educational technology (Jones, 2019) in which educational institutions are playing a minor role in the life of individual learners and an autonomous and self-directed learner is taken for granted. Furthermore, Della Porta and Diani (2020) remind us that "producing public goods, or expressing support for some moral values or principles does not automatically correspond to social movement action; the latter requires the identification of targets for collective efforts, specifically articulated in social or political terms" (p. 21). In this light, we should ask ourselves critically whether the licensing of resources or the development and publication of an open course can already be regarded as a social or political activity or whether it is just a side activity and product of another professional context.

The social, political, and cultural context has a high level of influence, but events do not lead necessarily to a "community response" in the way it would be expected from a social movement. In a similar manner, van Mourik Broekman et al. (2014) raise doubts that the uncritical adoption of protest started outside of the higher education context for the discourse inside academia might take away the original intention of this form of protest. Reflecting on the efforts around the UNESCO

declaration on OER and also looking at policy projects on OER in some European countries, one can also ask whether the goals and values are not mistakenly exchanged with the means. It seems that open licensing is the goal and not the means to reach more equality and fairness in (higher) education. Huge investments into the development of OER portals by the European Commission, for example, in the policy support program, have lacked sustainability and no real effectiveness studies of these investments have been conducted. Similar investments have been and will be undertaken in other countries following the UNESCO declaration. In times of scarcity of funding, investment into OER development programs should have as a basis an expected educational effectiveness instead of a value-based belief in openness.

Furthermore, studies have shown that there are more fundamental problems like time and resources which hinder teachers from adopting OER and sharing digital resources (Kreijns et al., 2013), which suggests that awareness and advocacy activities might not be sufficient to realize a more open educational system. It can be assumed that rigorous research on conditions and factors influencing access to education is more sustainable and impactful compared to advocacy and training activities (for example, of faculty members for developing OER).

## Conclusions

In this chapter, the arguments for the existence of an "open education movement" are used as a starting point, and SMT is adopted to analyze the field along the dimensions of conflict and protest, cultural representation, values and collective action, and the influence of the social, political, and cultural context. While some activities of open education are identified as practices of a social movement, the field as a whole resembles an epistemic community more than a social movement.

In general, it is also questionable whether the scholarly community of open education should put more effort into developing open education as a social movement. The Covid-19 pandemic has increased inequalities of educational systems worldwide, and a more systematic answer of the scholarly community and policymakers would be needed to make educational systems more accessible and to improve chances for disadvantaged learners.

Currently, activities are shifting from prescriptive and purely value-based advocacy (e.g., "OER are good, commercial licenses are bad") to evidence-based assessments of effects of open education on socially disadvantaged individuals (e.g., "MOOCs did not democratize education"). Investing more effort into rigorous research, developing a clearer and more inclusive approach to the central assumption of the research field, and steering the field towards an epistemic community would be beneficial for researchers and policy-makers in higher education.

Epistemic communities are depicted by the following traits according to Haas (1992):

- Share a set of beliefs and values as a basis for actions of community members.
- Share a set of causal beliefs derived from an analysis of current practices leading to a set of linkages between policy actions and potential outcomes.
- Share an understanding of validity and criteria for evaluating knowledge in the domain of expertise.
- Have a common policy framework leading to an improvement of human welfare.

Working on an explicit theoretical and conceptual framework in the sense of an epistemic community could increase the impact and coherence of work in the field of open education. Especially the discussion on causal beliefs could improve the rigor and quality of research in the field which would go beyond, for example, classical "license comparison studies" (Wiley, 2021, p. 412).

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