OTESSA
PROCEEDINGS

Open Education: Looking at Canadian Higher Education through a Critical Research Lens

Mara De Giusti Bordignon [iD]
Faculty of Education
Western University

Correspondence:
Mara De Giusti Bordignon
Faculty of Education, Western University,
London, Canada
Email: mbordign [at] uwo.ca

Abstract
Open education (OE), as the sharing, use, and reuse of resources, pedagogies, and teaching practices, is an evolving phenomenon globally. OE has gained momentum by challenging, transforming, and even displacing systems which exclude, disenfranchise, and marginalize members of both the public and academic communities. Traditional, dominant systems are problematic because they create barriers that restrict access, agency, ownership, participation, and experience. OE approaches represent a wide range of solutions from free open educational resources to open access of scholarly research. A complex open and closed ecosystem, coupled with flaws and weaknesses in OE practices and approaches themselves, create issues and tensions needing closer interrogation.

This paper provides a brief literature review on OE, with an emphasis on how meaning has evolved from being content focused to practice focused, alongside with the progression in an aim towards social justice and equity. A look at how OE is constituted within international and Canadian policy discourse also informs how conceptualizations form under social and political contexts. It is argued that critical theoretical frameworks can interrogate the OE phenomenon, particularly within Canadian higher education. A critical research lens can be beneficial in providing understandings of power relations as they affect social justice and equity.

Keywords: open education, higher education, policy analysis, critical research

Introduction

This paper provides a brief overview of open education (OE) literature which shows a progression from the opening of content towards the opening of practices, coinciding with an evolution of meaning towards inclusivity and widening participation. I will argue that a critical research lens can provide additional insight around open education policy discourse within the Canadian context.

Meanings of 'Open' and 'Openness' Within an Education Context

'Open' and 'openness' appear to be simple terms, but research on OE has shown that these concepts are more complex. The idea to 'open up' education as a public good and a human right has seen attempts to democratize access to education beyond privileged societal classes to improve economic and social participation for the working class, women, and other underserved groups. In simple terms, openness equates to transparency, and taking into consideration political and social dimensions, the term has evolved over time to address "access, flexibility, equity, collaboration, agency, democratization, social justice, transparency, and removing barriers" (Zawacki-Richter et al., 2020, p. 321). 'Openness' can be attributed to technological innovations (e.g., the internet, web 2.0 technologies, and social media), as well as social, cultural, and economic advancements (e.g., open universities, and creative commons [CC] licensing), which correlated to increased opportunities in teaching and learning (Peter & Deimann, 2013). Openness then is the philosophy which underpins open education.

The Open Education Consortium (n.d.) defines OE as "resources, tools and practices that employ a framework of open sharing to improve educational access and effectiveness worldwide." While openness has been equated to a value proposition associated with content and processes as something to be battled for (Weller, 2014), it is also considered a "constellation of elements" and therefore not a value specific to only one dimension or duality (Farrow, 2016). Huitt and Monetti (2017) differentiate between traditional and open educational experiences whereby traditional education is more top-down, community-oriented in comparison to open education as being a more bottom-up, individualized approach. However, this open-closed binary is refuted as being a false duality since it is argued that openness can occur along a continuum (Hodgkinson-Williams, 2014; Hodgkinson-Williams & Gray, 2009). But even a continuum includes educational practices as an interplay of open and closed elements within a complex ecology (Conrad & Prinsloo, 2020; Havemann, 2020). How 'open' and 'openness' is defined, interpreted, or accepted by individuals and groups remains contested and varied to this day.

To help frame concepts around OE, the theoretical open educational practices (OEP) framework developed by Koseoglu and Bozkurt (2018) is highly effective in providing detail and guidance. The framework expands on the work of Naidu (2016) who defined OEP as an "omnibus term" and builds on the dimensions noted by Hodgkinson-Williams and Gray (2009) and Hodgkinson-Williams (2014). The framework visualizes dimensions as concentric circles by centering openness as a philosophy with a "social justice orientation … to engage in and develop approaches that are ethical and have transformative power" (Koseoglu & Bozkurt, 2018, p. 454). Next, OE as a theory includes formal and informal educational opportunities, followed by OE practices which "focus on the process as opposed to product or outcome" (p. 455). The outermost layer of evolving-adaptive approaches can be examined further through

culture, pedagogy, technology, legal issues, finance, and labour. Open approaches would be considered open access (OA), open educational resources (OERs) as open content, open teaching, data, sources, scholarship, courses, etc. Thus, when researchers study the phenomenon of OE, whether broadly or as one approach, it is important to consider the links and relationships between philosophy, theory, practices, approaches, and dimensions. Weller (2020) argues that OEP still lacks a clear definition (which makes it difficult to identify benefits or impacts), noted little cross-fertilization between the areas of open universities, OER, and MOOCs, and proposed an open, online, flexible and technology enhanced (OOFAT) model to illustrate how higher education institutes are combining these three areas as another way to realize OE.

Researchers are increasingly recognizing the investigative power of critical theoretical frameworks and methodological approaches in studying OE (Bayne et al., 2015; Farrow, 2017; Lambert & Czerniewicz, 2020). Studies based on critical theory focus on the biases and asymmetries found in power relations, exercised by different actors, to uncover equity and social justice issues. Hodgkinson-Williams and Trotter (2018) use a social justice framework to determine that "unless the economic, cultural and political dimensions of social justice are adequately addressed, amelioratively in the short term and transformatively in the longer term, the value proposition of OER, and their underlying OEP, will most likely not be fulfilled in the Global South" (p. 220). A significant contribution to critical OE research by Lambert (2018) showed that OEP "broadening of scope overlapped with more mainstream educational, eLearning/and Distance Education debates about quality and pedagogy, at the expense of discourse on social justice purpose" (p. 240). Lambert argues away from "openness determinism" as inadvertently reinforcing the idea that technology can democratize education, and towards shifting educational inequality by "focusing on one or more of the three principles of social justice redistributive, recognitive and representational," thus aligning open education to a social justice definition (p. 240). Croft and Brown (2020) mapped principles of inclusive OE against Lambert's (2018) model of social justice to include recommended practices such as cultivating an appreciation for lines of social justice, creating inclusive spaces for contribution and collaboration, fostering an environment that respects student privacy and autonomy, and facilitating conversations around academic integrity and open education. Bali et al. (2020) built an OEP typology across three dimensions, from content-centric to process centric, from teacher-centric to learner-centric, and primarily pedagogical to primarily social justice focused. When OEP is primarily social justice focused, they considered the degree to which the sub-dimensions of economic, cultural, and political injustice are addressed. They found that "process-centric OEP often go beyond redressing economic injustice and can redress cultural and political injustice" (Bali et al., 2020, p. 11). Notably, Cronin (2020) proposes that a critical analysis of OE begins by interrogating power relations by asking crucial questions about who defines openness, who is included and excluded, to what extent open initiatives achieve their aims, whether there are unintended consequences to these initiatives, and what emancipatory open education looks like. Critical research following in the same vein can contribute towards connecting OE to social justice.

Canadian OER and OEP

While OE has gained acceptance, there has been little research to investigate how it is understood and the contexts within which it is used. In other words, using Koseoglu and Bozkurt's (2018) framework, how is OE ideology, theory, practice, and approaches conceptualized into policy discourse? Tlili et al. (2021) observe that "OER policies and initiatives

were catalysts for OEP research and application" (p. 11). OEP and OER policies, as forms of discourse, have come into greater critical scrutiny by scholars (Atenas et al., 2019, 2020, 2022; Bossu & Stagg, 2018; Cronin, 2019). However, critical approaches in open education policy analysis, particularly within the Canadian context, are lacking.

International organizations (IO) play an influential role in Canada's OE policy development. UNESCO's education branch is a United Nations agency committed to lead the Global Education 2030 Agenda of Sustainable Development Goal 4 through international collaboration of stakeholders (Education-United Nations Sustainable Development, n.d.; UNESCO, 2022). UNESCO defined OER in 2002, followed by an updated definition and ten action recommendations in its Paris Declaration in 2012 (UNESCO, 2002; UNESCO, 2012). In 2013, the Council of Ministers of Education Canada (CMEC) endorsed the 2012 Paris OER declaration (McGreal, 2020). In 2019, UNESCO updated definitions and scope, aims and objectives, areas of action, and monitoring (UNESCO, 2019), including the creation of new accompanying guidelines for policy implementation which encourages governments to adopt OER policy to "expand access to quality education, widening the distribution of high-quality educational resources and reducing barriers to learning opportunities" (Miao et al., 2019, p. 4). Also instrumental is the *Cape Town Open Education Declaration* (2007) which widened the definition of OE beyond resources (i.e., OER) to highlight the importance of 'practices' and 'processes' occurring in relation to those resources. The *Cape Town Open Education Declaration* coincided with the roadmap report by the Open e-Learning Content Observatory Services (OLCOS) out of Europe (2007). Reflecting on the efforts around UNESCO's declaration and recommendations on OER, and related efforts by the United Nations, the OLCOS, and the Commonwealth of Learning (among others), there is a danger of whether the goals and values are mistakenly exchanged with the means, in which "open licensing is the goal and not the means to reach more equality and fairness in (higher) education" (Kalz, 2022, p. 10).

McGreal et al. assert that Canada is a global leader in OER but "few Canadian institutions are visibly working towards open practices and/or policy development" (2016, p. 65). According to McGreal, "to date, there are no policies on OER in any province/territory, nor in any institution in Canada" (2020, p. 2). However, McGreal considers policy in the traditional sense which excludes a wide range of influential documents and texts considered as policy discourse under a Foucauldian view. Broadening the definition of policy allows us to consider any activity which shapes, guides, and influences how OE is conceptualized and implemented into practice. In Canada, education is under the responsibility of each province or territory so there is no formal federal presence to connect open initiatives or activities at the national level. However, federal initiatives can affect postsecondary education. For example, the *Tri-Agency Open Access Policy on Publications* mandates that "grant recipients are required to ensure that any peer-reviewed journal publications arising from Agency-supported research are freely accessible within 12 months of publication" (2016). This directly impacts scholars as their funding is contingent on meeting the criteria for making their research openly accessible. For individual institutions, the Open Scholarship Policy Observatory lists 14 Canadian universities with open access (OA) statements published by their faculty senate or board of governors, with potentially more listed by individual libraries, schools, or faculties (2017, October 2). Appearance of OE language is usually inconsistently dispersed throughout university documentation. Instances can be found as an OER subsection associated with OA, or as OE pedagogy, or scholarship associated with tenure, promotion, copyright, and intellectual property texts. OE language can also be found in

other texts such as reports, news releases, strategic documents, etc., by influential policy actors. Non-profit government organizations such as BCcampus and eCampus Ontario are also influential for their involvement in OER, education technology, and digital learning environments (BCcampus, n.d.; eCampus Ontario, n.d.). eCampus Ontario was created in 2016, based on the BCcampus model created four years earlier in British Columbia, both with the goal of providing OERs as an alternative to unsustainably high Access Copyright licensing and fees (Burgess, 2017; Henderson et al., 2018). eCampus Ontario "is a provincially funded non-profit organization that leads a consortium of the province's publicly-funded colleges, universities and indigenous institutes to develop and test online learning tools to advance the use of education technology and digital learning environments" (n.d.). eCampus Ontario is a strong advocate of OER policy adoption in postsecondary institutions (Skidmore & Provida, 2019).

Argument for Critical Research Approaches

Under a critical paradigm, a poststructural lens would enable a "sociopolitical critique" of socioeconomic-political contexts which define "legitimate" knowledge as being controlled through power relations (Koro-Ljungberg et al., 2009, p. 689). Critical poststructural research can deconstruct the 'grand narratives' presented by dominant structures and problematizes the power relations found within them. By connecting dominant structures to governing powers, the work of Foucault becomes relevant because governing techniques of power occur through the practice of discourse as policy, law, and regulation. Based on Foucault's premise that "discourses are practices that systematically form the objects of which they speak," Ball (1993) equates policy as discourse because "policy ensembles, or collections of related policies, exercise power through a production of 'truth' and 'knowledge'" (p. 14). Grand narratives, or discourse, can be considered a technique by dominant governing powers. A critical researcher would then consider that the construction and justification of knowledge claims is predicated on power. Critical poststructural research which investigates OE in Canadian policy discourse, inclusive of a widened definition of policy, is needed and is significant in bringing about new understandings of how OE can contribute towards equity and social justice.

Author's Contributions

Mara De Giusti Bordignon conducted the literature review and was the sole contributing author.

Open Researcher and Contributor Identifier (ORCID)

Mara De Giusti Bordignon [iD] https://orcid.org/0000-0002-9959-5862

Ethics Statement

An ethics review was not applicable.

Conflict of Interest

The author does not declare any conflict of interest.

Data Availability Statement

Data availability for this body of work is not applicable.

References

Atenas, J., Havemann, L., Nascimbeni, F., Villar-Onrubia, D., & Orlic, D. (2019). Fostering openness in education: Considerations for sustainable policy-making. *Open Praxis*, *11*(2), 167–183. https://doi.org/10.5944/openpraxis.11.2.947

Atenas, J., Havemann, L., Neumann, J., & Stefanelli, C. (2020). *Open education policies: Guidelines for co-creation*. Open Education Policy Lab. https://doi.org/10.5281/zenodo.4032993

Atenas, J., Havemann, L., Cronin, C., Rodés, V., Lesko, I., Stacey, P., Feliu-Torruella, M., Buck, E., Amiel, T., Orlic, D., Stefanelli, C., & Villar, D. (2022). *Defining and developing 'enabling' Open Education Policies in higher education*. 1–22. http://oars.uos.ac.uk/2481/

Bali, M., Cronin, C., & Jhangiani, R. S. (2020). Framing open educational practices from a social justice perspective. *Journal of Interactive Media in Education*, *2020*(1), 10. http://doi.org/10.5334/jime.565

Ball, S. (1993). What is policy? Texts, trajectories and toolboxes. *Discourse: Studies in the Cultural Politics of Education, 13*(2), 10-17. https://doi.org/10.1080/0159630930130203

Bayne, S., Knox, J., & Ross, J. (2015). Open education: The need for a critical approach. *Learning, Media and Technology*, *40*(3), 247-250. https://doi.org/10.1080/17439884.2015.1065272

BCcampus. (n.d.). *OpenEd Resources – Learning about, and experiencing, open educational practices.*. https://open.bccampus.ca/

Bossu, C., & Stagg, A. (2018). The potential role of open educational practice policy in transforming Australian higher education. *Open Praxis*, *10*(2), 145-157. https://doi.org/10.5944/openpraxis.10.2.835

Burgess, M. (2017). The BC open textbook project. In R. Jhangiani & R. Biswas-Diener (Eds.), *Open: The philosophy and practices that are revolutionizing education and science* (pp. 227–236). Ubiquity Press. https://doi.org/10.5334/bbc.a

Cape Town Open Education Declaration. (2007). https://www.capetowndeclaration.org/read/

Conrad, D., & Prinsloo, P. (Eds.). (2020). *Open(ing) education: Theory and practice*. Brill. http://brill.com/view/title/56897

Croft, B., & Brown, M. (2020). Inclusive open education: Presumptions, principles, and practices. *Distance Education*, *41*(2), 156–170. https://doi.org/10.1080/01587919.2020.1757410

Cronin, C. (2019). Open education: Design and policy considerations. In *Rethinking pedagogy for a digital age* (3rd ed.). Routledge.

Cronin, C. (2020). Open education: Walking a critical path. *Open(Ing) Education*, 9-25. https://doi.org/10.1163/9789004422988_002

eCampusOntario. (n.d.). https://www.ecampusontario.ca/

Education—United Nations Sustainable Development. (n.d.). Retrieved June 11, 2022, from https://www.un.org/sustainabledevelopment/education/

Farrow, R. (2016). A framework for the ethics of open education. *Open Praxis, 8*(2), 93-109. https://doi.org/10.5944/openpraxis.8.2.291

Farrow, R. (2017). Open education and critical pedagogy. *Learning, Media and Technology*, *42*(2), 130-146. https://doi.org/10.1080/17439884.2016.1113991

Havemann, L. (2020). Open in the evening: Openings and closures in an ecology of practices. *Open(Ing) Education*, 329-344. https://doi.org/10.1163/9789004422988_015

Henderson, S., McGreal, R., & Vladimirschi, V. (2018). *Access copyright and fair dealing guidelines in higher educational institutions in Canada: A survey*. https://auspace.athabascau.ca/handle/2149/3626

Hodgkinson-Williams, C. (2014, June 25). *Degrees of ease: Adoption of OER, open textbooks and MOOCs in the global south*. http://hdl.handle.net/11427/1188

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 Information and Communication Technology, 5*(5), 101-116. http://ijedict.dec.uwi.edu/include/getdoc.php?id=4680&article=864&mode=pdf

Hodgkinson-Williams, C. A., & Trotter, H. (2018). A social justice framework for understanding open educational resources and practices in the global south. *Journal of Learning for Development*, *5*(3). https://doi.org/10.56059/jl4d.v5i3.312

Huitt, W. G., & Monetti, D. M. 2017. Openness and the transformation of education and schooling. In R. Jhangiani & R. Biswas-Diener (Eds.), *Open: The Philosophy and Practices that are Revolutionizing Education and Science* (pp. 43-65). Ubiquity Press. https://doi.org/10.5334/bbc.a

Kalz, M. (2022). Open education as social movement? Between evidence-based research and activism. In *Handbook of open, distance and digital education* (pp. 1-14). Springer Nature. https://doi.org/10.1007/978-981-19-0351-9_3-1

Koro-Ljungberg, M., Yendol-Hoppey, D., Smith J., & Hayes, S. (2009). (E)pistemological awareness, instantiation of methods, and uninformed methodological ambiguity in qualitative research projects. *Educational Researcher*, *38*(9), 687-699. https://doi.org/10.3102/0013189X09351980

Koseoglu, S., & Bozkurt, A. (2018). An exploratory literature review on open educational practices. *Distance Education, 39*(4), 441–461. https://doi.org/10.1080/01587919.2018.1520042

Lambert, S. R. (2018). Changing our (dis)course: A distinctive social justice aligned definition of open education. *Journal of Learning for Development*, *5*(3), 225–244. https://jl4d.org/index.php/ejl4d/article/view/290/334

Lambert, S., & Czerniewicz, L. (2020). Approaches to open education and social justice research. *Journal of Interactive Media in Education*, *2020*(1), 1. https://doi.org/10.5334/jime.584

McGreal, R. (2020). Open educational resources in Canada 2020. *Canadian Journal of Learning and Technology*, *46*(1), 1–10. https://doi.org/10.21432/CJLT27935

McGreal, R., Anderson, T., & Conrad, D. (2016). Open educational resources in Canada. In F. Miao, S. Mishra, & R. McGreal (Eds.), *Open educational resources: Policy, costs, transformation* (pp. 62–76). UNESCO; Commonwealth of Learning (COL). https://unesdoc.unesco.org/ark:/48223/pf0000244365

Miao, F., Mishra, S., Orr, D., & Janssen, B. (2019). *Guidelines on the development of open educational resources policies*. UNESCO; Commonwealth of Learning (COL). http://hdl.handle.net/11599/3455

Naidu, S. (2016). The case for open educational practice. *Distance Education*, *37*(1), 1–3. https://doi.org/10.1080/01587919.2016.1157010

Open Education Consortium. (n.d.). *About the open education consortium.* https://www.oeconsortium.org/about-oec/

Open eLearning Content Observatory Services. (2007). *Open educational practices and resources: OLCOS Roadmap 2012*. https://olcos.org/english/roadmap/index.htm

Open Scholarship Policy Observatory. (2017, October 2). *Canadian university open access statements*. https://ospolicyobservatory.uvic.ca/canadian-university-open-access-statements/

Peter, S., & Deimann, M. (2013). On the role of openness in education: A historical reconstruction. *Open Praxis*, *5*(1), 7–14. https://doi.org/10.5944/openpraxis.5.1.23

Skidmore, J., & Provida, M. (2019, March). *A place for policy: The role of policy in supporting open educational resources and practices at Ontario's colleges and universities*.

https://www.ecampusontario.ca/wp-content/uploads/2019/08/2019-08-07-skimore-oe-policy-report.pdf

Tlili, A., Burgos, D., Huang, R., Mishra, S., Sharma, R. C., & Bozkurt, A. (2021). An analysis of peer-reviewed publications on open educational practices (OEP) from 2007 to 2020: A bibliometric mapping analysis. *Sustainability*, *13*(19). https://doi.org/10.3390/su131910798

Tri-Agency: Canadian Institutes of Health Research (CIHR), Natural Sciences and Engineering Research Council of Canada (NSERC), & Social Sciences and Humanities Research Council of Canada (SSHRC). (2016, December 21). *Tri-Agency open access policy on publications.* Federal Government of Canada. http://www.science.gc.ca/eic/site/063.nsf/eng/h_F6765465.html

UNESCO. (2002). *Forum on the Impact of Open Courseware for Higher Education in Developing Countries, UNESCO, Paris, 1-3 July 2002: Final report*. UNESDOC Digital Library. https://unesdoc.unesco.org/ark:/48223/pf0000128515

UNESCO. (2012, July 20). *The Paris OER Declaration 2012*. https://en.unesco.org/oer/paris-declaration

UNESCO. (2019, November 25). *Recommendation on open educational resources (OER)*. https://www.unesco.org/en/legal-affairs/recommendation-open-educational-resources-oer

UNESCO. (2022). Education transforms lives. Retrieved August 1, 2022 from https://www.unesco.org/en/education

Weller, M. (2014). *The battle for open*. Ubiquity Press. https://doi.org/10.5334/bam

Weller, M. (2020). Open and free access to education for all. In D. Burgos (Ed.), *Radical solutions and open science: An open approach to boost higher education* (pp. 1–15). Springer. https://doi.org/10.1007/978-981-15-4276-3_1

Zawacki-Richter, O., Conrad, D., Bozkurt, A., Aydin, C. H., Bedenlier, S., Jung, I., Stöter, J., Veletsianos, G., Blaschke, L. M., Bond, M., Broens, A., Bruhn, E., Dolch, C., Kalz, M., Kerres, M., Kondakci, Y., Marin, V., Mayrberger, K., Müskens, W., … Xiao, J. (2020). Elements of open education: An invitation to future research. *The International Review of Research in Open and Distributed Learning*, *21*(3), 319-334. https://doi.org/10.19173/irrodl.v21i3.4659