EDITORIAL

# Approaches to Open Education and Social Justice Research

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## Introduction

Why a Special Collection on Open Education and Social Justice? Isn't open education intrinsically a social justice matter? And why a focus on theorising open education and social justice? There has been long standing but separate practice and scholarship in both open education and social justice but the relationship has only become the focus of attention quite recently. As is so often the case, this started in more informal social media and blogging spaces (Lambert 2018b; Saheli Singh 2015; Watters 2014) and then was developed through educational technology conferences with an emphasis on critical inquiry (Bowles 2019; Cronin 2016; de los Arcos & Pete 2019; Khoo 2019) before shifting to formal outputs (Hodgkinson-Williams & Trotter 2018; Lambert 2018a; Lambert 2020a).

One of the reasons that this relationship has needed to be asserted has been because open education itself has been going through a period of change; it has become more mainstream (Weller 2014), it has formed arteries and subfields (Jhangiani 2017), and it has also been subjected to "openwashing" by market forces (Allen 2019; Lamb 2013). Therefore, the cluster of practitioners and scholars for whom open education is a strategy of better education for a fairer and more just world have been turning their attention to understanding what exactly this means, what form the relationship takes and how it can be best understood and supported. It is a timely reflection, looking back on a decade or more of investments in re-usable openly licenced OERs and then widely accessible MOOCs – neither of which did as much as hoped to democratise knowledge or change educational access patterns.

Within the current "critical turn" or critical appraisal of open education (Lambert 2020b), this Special Collection provides evidence of social-justice based open education initiatives which improve the experience and outcomes for different global under-represented learners in particular and specific ways. It aims to present a more nuanced conversation about progress towards social justice, and advance understanding of the many diverse ways that open education can act as, or be aligned with, social justice in different contexts.

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## Approaches to Open Education and Social Justice Research

Theories of social justice were developed over a long period within the wider fields of sociology, political economy and philosophy, but have been filtered down and adapted by educational research which seeks to understand and advance educational equality as a more specific sub-set of societal inequality (Burke 2012; Keddie 2012; Leibowitz & Bozalek 2016).

Whereas John Rawls (1971) and Amartya Sen (1999, 2009) (both scholars at prestigious English institutions) are most often cited with regard to the economic dimensions of justice, it is the American scholar Nancy Fraser who is best known for articulating the cultural and gender recognition dimensions of social justice (Fraser 1995). Fraser and Iris Marion Young are known for their debates throughout the 'culture wars' of the 1970s when identity politics took over the classical political economy approaches to justice. Fraser and Young (Fraser & Olson 2008; Young 1997) are often cited together for the academic debate that produced the three-dimensional approach to social justice which is best known today – encompassing the economic, cultural, and political dimensions of justice. Tara Yosso (2005) and Glenn Loury (2002, 2004) are also important voices to unpack racial justice and inequalities from a time when much cultural theorising was from a white male perspective.

This collection of papers is influenced by what Cox and colleagues calls Fraser's "tri-valent" or three dimensional conceptualisation of social justice, with many authors citing both Hodgkinson-Williams and Trotter (2018) and Lambert (2018) who have contextualised Fraser's three principles for the contemporary open education context. There are also papers strongly influenced conceptually by feminism, decolonisation and First Nations people's rights for recognition of traditional knowledges both "on country," as part of national student strikes and through digital means. Influences from Freire and critical pedagogy are also evident through direct referencing (Freire 1970, 1994) or just an attitude of practical critique and hopefulness underpinning the research.

Starting with the studies framed by Fraser's model, Cox, Masuku and Willmers have produced a case study of the Digital Open Textbook for Development project from the University of Cape Town. The authors find that open textbooks and associated student-centred pedagogical practice

have potential to disrupt histories of exclusion in South African higher education institutions by addressing both the issues of cost and marginalisation of ideas and experiences. Brown and Croft similarly explore the social justice potential of open online annotation for marginalised students and ideas, proposing a framework to address the risks and potential harm of this particular social and student-centred pedagogical practice. Charitonos, Albuerne Rodriguez, Witthaus and Bossu use Fraser to consider the case of open education for professional learning amongst European refugee advocates. Bali, Cronin and Jhangiani also use Fraser as extended by Hodgkinson-Williams and Trotter (2018) in consideration of the transformative vs ameliorative approaches (remedy vs root causes) to the three dimensions of social justice as applied to an existing framework and examples of Open Educational Practices (OEPs.) Funk too considers the transformative vs ameliorative in the context of open online platforms and the construction of Northern Australian indigenous knowledges. Like Funk, Adam's South African case study also draws on Fraser and other post-colonial theorists to question the extent to which open education can contribute towards transformative social justice in post-colonial, multi-lingual contexts.

By way of contrast, Meri-Yilan's case study of Turkish bi-lingual MOOC learners draws instead from the social inclusion literature. Social inclusion is French in its theoretical roots and quite influential on education policy in the UK, Europe and Australia (Barton 2005; Hayes, Gray, Edwards, & Australian Institute of Family Studies 2008; May & Bridger 2010). Social inclusion has in recent times also expanded to include digital inclusion and linguistic inclusion – ensuring that suitable technology use and translated or multi-lingual options are made available for members of a society to ensure equitable access to the services required of modern life – from banking, to online purchasing, online healthcare and online education (Baker, Hanson, & Hunsinger 2013; Barrett et al. 2015; Gorski 2009).

Turning to the statistical and experimental studies, drawing upon more than 700 undergraduate surveys, Jenkins, Sanchez, Schraedley, Hannans, Young and Navick focus on the redistributive or economic social justice dimension with their study into textbook affordability for racial/ethnic minority students, low-income students, and first-generation college students at a four-year Hispanic Serving Institution (HSI) in Southern California. This in-depth study using multiple statistical analyses and contributes important new knowledge about the short-term disadvantages of reduced academic progression and success for traditionally under-represented students. The study also contributes a fascinating discussion linking these results to recent studies into long-term disadvantages under-represented students will likely face in terms of loan debt, career paths, lifelong earnings, home ownership and retirement savings.

Nusbaum's project is firstly a case of recognitive justice in diversifying the content of a Psychology open textbook to make visible the women and people of colour who have contributed to the development of the field. It also contributes a novel comparative experimental method that quantifies the effects of content diversification related to feelings of belonging (to class, to campus) as a result of efforts taken to not only provide a free textbook, but to make the contents of the textbook both welcoming and up-to-date. The conceptual emphasis on belonging places Nusbaum's study within the tradition of higher education student equity research and policy known as "widening access" or "widening participation" which aims to achieve population parity between society and the mix of people found in colleges and universities (Bennett, Southgate, & Shah, 2016). The literature of "widening access" has great parallels with the economic dimension of social justice and its development into "widening participation" parallels the shifting concerns to recognitive and representation justice and overcoming socio-cultural stereotypes and barriers to equal participation of educational experience.

Tang and Bao's study is novel conceptually and also methodologically as an example of open research. Rather than collect primary data for their study, instead the authors re-used a portion of an open-access data set (6390 responses from educators, librarians, and formal and informal learners) from the UK's OERHub (Farrow et al. 2015) focussing on the responses from 675 K-12 educators. Tang and Bao's study is novel also for the use of what social theorist Wenger-Traynor calls "threading though" or combining two theories, often from different knowledge domains to improve the "fit" of the theory to the context and issue that is being studied (Wenger-Traynor 2013). One theory tends to overcome what the other theory lacks, and vice versa. In this study the authors have combined an early media/technology theory i.e. knowledge gap theory (Tichenor, Donohue, & Olien 1970) with a cultural difference framework i.e. Hofstede's Six Cultural Dimensions (Hofstede 1984). This allows statistical analyses to be undertaken on the cultural difference and impact of school teachers' access and usage of OER. Knowledge gap theory looks at socio-economic status to explain the differences in access, usage and impact of mass-media and information consumption which can be considered part of the earlier corpus of literature into social and digital divides, which is somewhat related to social inclusion literature discussed earlier.

Adam's study also threads multiple theories together, not to produce a new method of quantitative analysis but to contribute a new conceptual framework for future qualitative studies. Adam threads the transformative rather than the ameliorative approach of Fraser's model with decolonial discourses to highlight the root causes (attitudes and systems) which need shifting to address "material injustices, cultural-epistemic injustices, and political/geopolitical injustices (Adam, 2020)."

Koseoglu, Ozturk, Ucar, Karahan and Bozkurt present an important review and content analysis of studies into gender inequality spanning 30 years, and focussing their discussion on the implications on curriculum design in Open and Distance Learning. Koseoglu et al. use Therborn's inequality framework (vital inequality, resource inequality, existential inequality) which is another conceptualisation drawn from sociology and the political economists, and later used to consider education (Therborn 2012).

**Figure 1** below provides a visual summary of the different theoretical approaches to social justice that are included in this Special Collection.

## Walking the Talk

On the basis that social justice is "participatory parity" as Nancy Fraser argues, it was incumbent upon us, as editors of a Special Collection specifically focused on social justice and open education, to make a serious effort to ensure maximum participation in this collection itself. If not, the risk was that the collection on social justice would be filled with papers from established researchers likely from the global north. This meant not only ensuring that the call was as widespread as possible, but putting in place mentoring and scaffolding for those who considered themselves peripheral in some way. Thanks to the generosity of the Hewlett Foundation which has funded open education for a long time, a grant was procured for this very purpose. We were mindful that peripheral is not as clear cut as it may seem, and that mentoring itself embodies complex power dynamics, potentially exacerbated by taking place online. (See Hlengwa 2020 for more on the complexity of mentoring in academia). It became clear how much more nuanced "peripheral" is when people provided their reasons for requesting mentoring support. We had been clear that the collection should have a mix of papers and authors from both the global south and global north, and indeed, we are pleased that this is the case. However, the reasons provided for requesting mentorship were multifaceted: part-time or precarious contract work; high teaching workload; no support or culture of research in their institution; no mentors or scholars of open education at their institution; new to the field; researching or doing a PhD in another discipline; having marginalised identity within their institution; being in a remote location and working in isolated working conditions. These reasons illuminate the experience of higher education for too many researchers balancing multiple roles and jobs as well as the breakdown of historical relationships enabling knowledge building. In addition, we suspect that the topic is unfortunately a relatively niche one; social justice and open education can be overshadowed in the dominant marketized discourses that characterise higher education today.

Nevertheless, there were 25 expressions of interest and we were able to accept 11 high-quality abstracts on a diverse range of topics. Our 11 lead authors are either from the global south (South Africa, Egypt), located in a relatively peripheral country in their geographic region (Turkey, Ireland), or in a regional or peripheral location within their country (Darwin, Pullman, Carolina, Boise, Channel Islands) and/or bi-lingual academics working in a different culture than their family or birth origins. Three of the authors are PhD candidates juggling their papers and their theses.

Three experienced mentors developed relationships with the authors who requested their assistance. Interestingly several experienced scholars requested mentorship, indicative, we think, of the ongoing stresses and pressures of academic publishing. The mentors and mentees had to find ways in each case of communicating with one another – using virtual tools and shared documents. Clarifying expectations was part of the process in terms of what could be expected each way and negotiating time frames appeared to be one of the frustrations. There was a range of needs and requests. Some were to do with the framing of academic arguments, and mentees commented that they would take what they had learnt back into their other work. Some was to do with methodology and language, and some was editorial advice. Some mentees commented that it was useful when mentors understood their subject matter, while others said it was useful
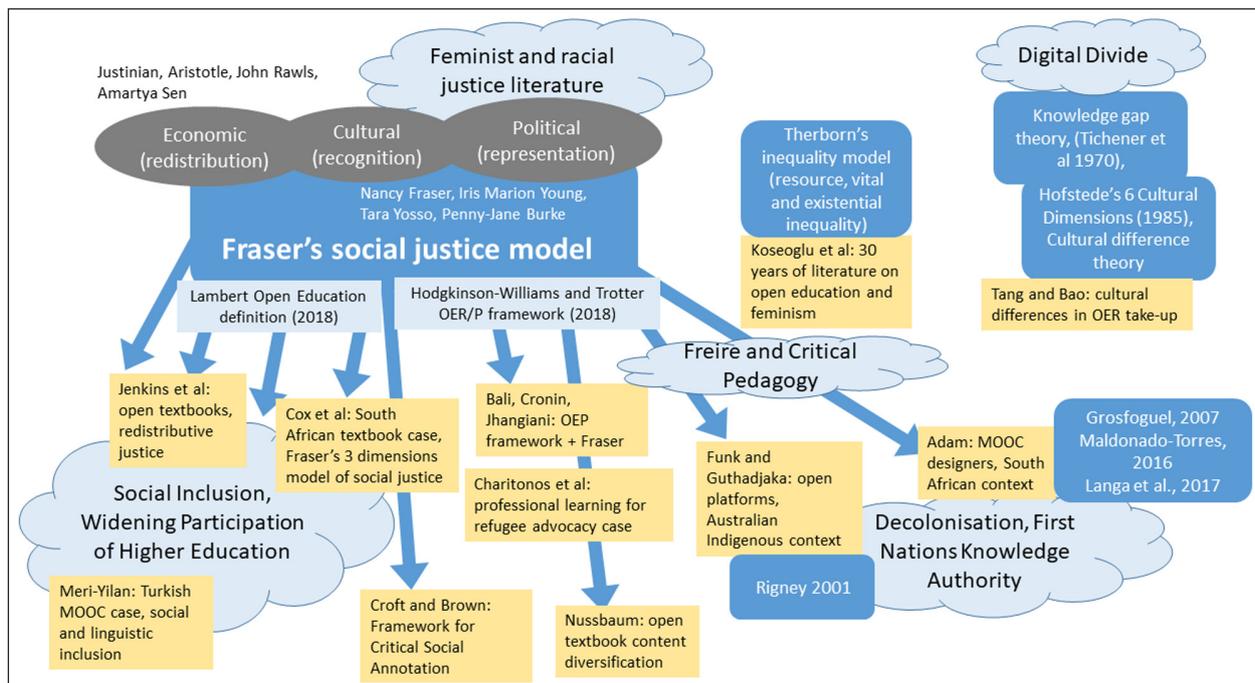


**Figure 1:** Social justice concept map of the Papers in the collection and their theoretical underpinnings CC-BY Sarah Lambert.

when they did not! Interestingly, there was especially a call on mentors' time after the peer reviews had come in, when the thoughtful recommendations made were to be interpreted and implemented.

We have been fortunate in the quality of peer review reports and grateful to our peer community who took an interest in our Special Collection: their time, intellectual contribution, practical help and developmental feedback was invaluable for the authors. We also know how much the mentors have learnt and benefitted from the process. In addition to the mentors, we as co-editors, also engaged with authors throughout the process; the writing process was not simply technical but a fascinating intellectual and conceptual conversation.

This Special Collection has been a great collaboration and labour of love since July 2018 when Sarah tentatively pitched the idea over a meal at a conference in Adelaide and Laura embraced it enthusiastically. We both had a lot of commitments at the time and agreed to make a start on it in 2019, when we put out a call for papers at the OER19 conference in Dublin. Both of our backgrounds and previous work roles influenced our passion for the topic and our motivations to take a participatory approach to the editorial role.

Sarah was writing her PhD thesis at this time, a critical appraisal of open education as social justice. Her thesis was motivated by close involvement with the MOOC phenomena, bearing witness to the investments made on promises of widening access to higher education for under-represented learners and the rapid co-option by the commercial arms of the university. As a long-term educational technologist working from a regional and social inclusion perspective, she identifies with and is keen to address a gap in social justice focussed scholarly publishing within the field, as well as the under-reporting of positive social-justice based open education initiatives. Laura has many years of working in open education practice and scholarship (see for example Czerniewicz et al. 2015; Czerniewicz 2016a; Hodgkinson-Williams et al. 2013) in a country whose education policies still value social justice principles despite extreme financial pressures and deeply conflicting imperatives (Swartz et al. 2018). She also has publishing and editorial experience, as well as a shared passion for righting skewed global knowledge imbalances (Czerniewicz 2016b).

All the papers in this Special Collection were strong to start with; we believe that the mentoring and editorial process has contributed to deepening the theoretical underpinnings of the field through encouraging wide and deep engagement with the social justice literature. In our view this is a rich and diverse set of papers which make novel empirical and theoretical contributions to open education knowledge. In answer to the questions posed at the beginning of this editorial – sadly open education is neither automatically nor always a social justice project, but these papers demonstrate how much it can be and how important that relationship is.

We hope you enjoy and are as inspired by this curated collection as we are.

## Competing Interests

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