

# SUSTAINABILITY AND POLITICAL OPPORTUNITIES OF THE OPEN EDUCATION MOVEMENT: A CASE STUDY OF CHINA'S POTENTIAL ROLE\*

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## Abstract

This paper will propose two potential applications for the developing open education movement, or OE. One will recommend a policy solution with the potential to settle the OE conundrum of sustaining the movement while maintaining the attributes of openness. Another will examine the possibility of using OE as a tool for transnational political leverage. This hypothetical scenario will center on China as a case study. On the first proposal, the question of whether open education should be available for non-open societies is considered. For the purposes of this study, I will suggest...no. In the case of China, a nation with political attributes which run antithetical to the notion of openness and with great potential for market demand for OER due to development needs, there exists an opportunity to settle the problem of OER sustainability by applying a fee-paying principle to this non-open state for the use of OER. Open education remains open for open societies and closed societies must pay for access, provided that OER reaches its practical educational potential and can provide the kind of knowledge a developing nation like China requires. For the second proposal, and as an extension of the first, it is argued that the exclusivity of OER to open societies has the potential to make OER a tool for leveraging political reform in certain closed societies i.e. China.

## 1 Introduction

The open education movement has recently come to the forefront of education policy discourse. While most agree that the movement is full of vast potential for growth, there is much debate on its how its further development should move forward and, especially, how this growth can be sustained. There is no question that the movement has unlimited potential to deliver high quality educational material to a large audience, but the economics of open education remain problematic. The financial and economic realities of modern society dictate that high quality open educational resources are extremely difficult to ensure without a means to provide tangible incentives for the potential developers, contributors, and administrators of open educational resources. Open education discourse is centered on the intellectual concept of “openness”, which is commonly defined as implying free access to all those interested. However, should open access to OE be

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available to nation-states that would not be considered open in other aspects of their respective societies? The following essay will outline an argument for a limited-access policy for closed societies interested in access to OE resources developed in liberal-democratic societies. Such a policy would be administered via a fee-paying principle which, in theory, could provide the necessary revenues for developing and sustaining open education. As a potential secondary outcome, high-quality, yet limited-access open educational products demanded by closed societies could serve as a tool for leveraging political reform in closed societies.

## 2 China: A Welcome Member of the Open Education Movement?

The early part of the twenty-first century has been marked by China's rapid economic ascension and, subsequently, an increasing role as a world political actor. While the discourse on globalization has linked the Chinese state with the economic, political, social, and educational affairs of its Western competitors, ideological rifts along cultural and political lines have made for some tense diplomatic interactions. Western liberal democracies have built a cultural ideology around a notion of openness, which is often at odds with the Chinese point of view. Much of Sino-Western debates focus on intellectual property rights and access to information, two key aspects of the open education movement, thus China's role in the movement is in need of discussion.

The open education movement is routinely linked to the notion of the open society, a phrase with connotations of comprising the attributes of the modern liberal democracy. OE intellectual discourse routinely links OE to the next ideological stage in twenty-first century democratization. George Soros has credited one Aryeh Neier with breaking down the seven conditions necessary for the development of an "open society": regular, free and fair elections, free and pluralistic media, a rule of law upheld by an independent judiciary, constitutional protection for minority rights, a market economy that respects property rights and provides opportunities and a safety net for the disadvantaged (The open society). While one could devote an entire article to the degree to which China exhibits any of these qualities, I think we can agree that the Chinese state's record on at least some of these conditions has been rather weak. Thus, an important question emerges: if the OE movement is an extension of the liberal democratic "open society" and the modern Chinese state either lacks the conditions of the "open society" or actively seeks to suppress them, should China be granted equal access to the enormous potential social and economic benefits of the open education movement? As Britez (2008) has noted, "the implications of . . . education projects developing OER are highly contested, and still enmesh with larger debates over electronic copyright issues and academic freedom. (p.34). On academic freedom, Britez elaborates, "the fact is that the promises of OER . . . in developing countries are not merely related to increasing opportunities of access to information , but also the degree to which the access and use of the resources will be politically free for their users and producers: as an extension of the principle of academic freedom. (et al. p. 40). Given the capacity of knowledge to spread throughout the world via the forces of globalization and the networked information economy, authoritative governments are sure to be apprehensive about the use of OER within their respective nation-states.

Indeed, the enormous potential of OER to provide an equitable distribution of educational opportunity to the developing world is certainly tempting, however, the freeing of knowledge from institutional barriers would certainly be perceived as a threat to authoritative governments. As Besley and Peters (2007) explain, in their analysis of Foucault and his notion of the spaces of power, institutions "became spatial models for government rationality. They provided the basis for the exercise of social control and manipulation. The school is . . . the relation between educational space and a particular form of disciplinary political rationality" (p.79). OER has the potential to remove the systematic means of social control through institutions, such as schools. Despite the potential threats, closed societies such as China have shown an enormous interest in welcoming OER, albeit on its own terms. Lucinda Morgan's (2008) analysis of China's developing OE inquired, "as to how a government can attempt to be progressive in technologic movements that involve access to information by way of the internet, while at the same time limiting and blocking knowledge sources to its own population" (p. 96). China's media and internet restrictions have been well-documented, however, Morgan's study revealed a nation actively involved in the development of OER, including MIT's OCW initiative. In fact, Morgan asserts that there are "more universities involved with open source in China than

all of North America, and most would agree that China is...lagging behind about five to seven years to that of North America” (et al., p.99). Clearly, the Chinese government recognizes the enormous potential for OER to contribute to economic development. From the point of view of developed countries, this immense gap in OE development has to be viewed as a strategic advantage.

From the perspective of the liberal-democratic, Western countries that, for the most part, currently have the technological advantage to develop OER to its maximum potential, there emerges an ethical dilemma. Liberal intellectual discourse can carry on about equal opportunity in globalized education through OER, a perceived fundamental extension of the “open society.” From the humanist perspective, the provision of educational opportunity to the developing world is certainly a desirable goal. However, the reality is that certain nation-states with a high demand for OER also exhibit qualities outside the realm of liberal-democratic and “open society” conditions. Should nations that violate human rights, withhold elections, censor information, and ignore property rights be granted free access to the intellectual products of the free world? Morgan has indicated substantial demand for the development of OER in China and open education discourse reveals an intellectual struggle in the sustainability of OER and of the capacity of OER to reach its full potential without financial incentives. OE academics would be quick to condemn the exclusionary function of the policy I am proposing on the grounds it is antithetical to the freedom from censorship and property restrictions that OE promises to reduce. However, the next two sections will attempt to illustrate how China, my proposed target of a limited-access OE policy, doesn't honor key conditions of the open society, and thus, should not be granted full access without paying for its oppression.

### 3 Censorship

The emergence of the networked information economy and its byproducts, such as OE, have inspired academic reconsiderations of twentieth century freedom and democracy. Yochai Benkler, perhaps the leading scholar in this field, has written extensively on autonomy, democracy, and social justice in the information age (2002, 2003, 2006). According to Benkler, “the digitally networked environment makes it possible for many individuals and groups with similar beliefs to band together, express their views, organize, and gain much wider recognition than they could at a time when gaining recognition required acceptance by the editors of mass media” (2002). Thus, twenty-first century models of communication and social production arguably represent a new form of democratization. On the detrimental role of mass media on democracy, Benkler presents a notion of the Berlusconi Effect, where ownership of mass media outlets provides a disproportionate amount of political power (2003). In the case of China, state-led media outlets align with the central government to limit access to information and promote a single line of thought. In Morgan's words, “the Chinese government has been more active in blocking, or censoring, of information available to the general, domestic population” (2008, p.95). Proponents of the network society and its by-products, such as OE, would condemn such a trend on the basis it is antithetical to the premises of twenty-first century democracy, yet seem to be content to allow this same political entity at the table of OE development, as in the case of China's active involvement in MIT's OCW through the CORE program as outlined by Morgan (2008).

According to the Berkman Center at Harvard University, China manages “the most extensive and technologically advanced system of Internet filtering in the world” (Shirk, 2008, p.91). At various times and with varying degrees of intensity, popular foreign websites such as Wikipedia, YouTube, Yahoo, MSN, and Facebook are censored in China (YouTube and Facebook being the current targets). Sites such as Wikipedia and Facebook are increasingly becoming vital components of OE discourse as these sites are built on the notion of peer production and the social production of knowledge. If potential consumers of OE are not granted full access to its educational potential, then they are unable to receive the comprehensive educational experience they otherwise might find in an open society. A 2005 poll by the Chinese Academy of Social Sciences revealed that a mere 7.6 percent of “Chinese Internet users believe that political content on the Internet should be controlled” (Shirk, 2008, p.92). While the primary position of this essay is that an explicit restriction of high-quality OE from closed governments could prompt reform, a domestic population displeased with the knowledge that their government's transgressions are blocking their access to the fundamental right of an enriching education could also inspire reform from within. Regardless of any reform scenarios, the point is

that a country, like China, actively engaged in the practice of censorship are exhibiting non-open qualities and their role in the OE movement is in need of critical examination.

## 4 Intellectual Property

In addition to issues related to censorship, China has been the recipient of major international criticism over its commitment to enforcing property rights. However, unlike censorship, which is pretty straightforward, the issue of property rights has become much more difficult to define, and therefore legislate, in the networked information economy. Scholars of the development of the network society have routinely challenged the notion of property rights in modern society on the premise that today's intellectual goods can and should prosper without traditional views on property rights. Benkler (2003) has asserted that property rights have served as a constraint in the development of a free market, despite its role as a precondition, and Moglen (2003) has argued that property rights on information embody an exclusionary function by passing off production costs on to the few consumers who can afford them. While Moglen's argument alludes to the abolishment of property rights across the entire proprietary sphere, Benkler has called for a more balanced perspective in which an intellectual commons exists where "nonmarket and decentralized models of production...increase their presence along the more traditional models" (2002). Since the development of open education can be linked to the construction of intellectual goods and information processing, and therefore, a function of nonmarket production with flexible property right enforcement, one might be inclined to view a discussion of OE and intellectual property as pointless.

On the contrary, when considering the international context of OE in terms of who will have access, an analysis of how certain states respected the intellectual property rights of firms and individuals that produced traditional goods in a centralized market-based economy ought to be the basis from which an access-policy for OE is based. With China's economic reform and subsequent linkage with the global economy, issues of intellectual property rights have come to the forefront of Sino-Western diplomatic and legal concerns as secondary production of goods have shifted from the West to China and elsewhere. Numerous cases of intellectual property violations, ranging from simple copyright issues to borderline industrial espionage, have filled the headlines. A chapter in Ted Fishman's book *China, Inc*, titled "Pirate Nation" provides a wide range of qualitative evidence on the subjects and would be a good starting point for anyone interested in further research (Fishman, 2006). On the issue of intellectual property in relation to academia and open education, Morgan writes, "copyright is a concern in China...and the open access movement must stress the importance of respect for intellectual property rights...the concept of copyright...seems to be acquired more quickly by Western countries, China has no history of it within its traditional culture" (Morgan, 2008, p.100). Morgan chooses to take an apologetic tone towards Chinese property right transgression, however, she does not consider that the tangible advantages gained by infringement are not unknown to those pleading ignorance.

Claims of a cultural ideology which not does include a Western concept of property rights have been the standard defense of Chinese infringement. One might argue that the contemporary critical engagement of the role of property rights in the networked society is bringing the modern world in line with traditional Chinese views of property, thus Chinese views on intellectual property would be considered more enlightened for the twenty-first century. However, I assert that the cultural relativist argument has been a convenient excuse for the Chinese state. Critical engagement with 21<sup>st</sup> century property rights are being conducted by liberal-democratic states open to reforming society through a democratic, rational-legal means. Socially produced products of the network society, such as open education, which may or may not include traditional property rights should be for the benefits of liberal-democratic, open societies which have rationally reformed property rights via a democratic means. Access for nonmarket based educational products should not be fully granted to entities which have blatantly disregarded international law on intellectual property rights for market-based products.

## 5 Sustainability via a Fee-Paying Principle for Closed Societies

Despite the enormous potential of OE for delivering a quality educational experience to a massive audience without the social, geographic, and economic restrictions of twentieth century education structures, issues of sustainability remain. Leading scholars have noted that the social production of intellectual goods in the networked information economy lack the marginal cost associated with tangible goods of the standardized means of production in the industrial economy (Benkler, 2002, Moglen 2003). However, this does not mean that quality assurance and the refinement and maintenance of OE are not without substantial costs. Eben Moglen has argued that intellectual goods produced within the commons of social production are without a marginal cost and therefore should not be exclusionary products of a proprietary culture (Moglen, 2003). However, in the context of OE content, Christopher Mackie's synthesis of the challenges in implementing OE exposed the immense difficulty in placing OEC in the context of Moglen's vision:

On the challenges of OEC production:

- Faculty may lose some revenue or career rewards by publishing content outside of traditional channels
- To be regarded as useful OEC, it is usually in need of further processing and/or refinement
- Content processing often requires a level of skill that a content creator and/or employer may not have.

On the absence of quality measures in OEC:

- Lack of incentives for creators and maintainers limits capacity to produce quality content
- Lack of quality measures lowers confidence in potential consumers of OE products (Mackie, p. 123-125).

Mackie's analysis of the limits and challenges of OE exposes a clear flaw in the logic of overly optimistic OE proponents. The production of intellectual products for use in OEC may be with little or no marginal cost, however, the development, refinement, maintenance, quality assurance, and incentives for content creators requires some level of financial input to ensure a deliverable and effective educational tool. Thus, to some degree, costs need to be passed on to consumers to ensure quality. However, to employ a fee-paying principle to the consumers within liberal democratic societies would be detrimental, and perhaps even an insult, to the proponents of freedom who have sacrificed so much to continue the development of democracy and to have had it reach this stage. Thus, I propose full-access to OER in open societies and the introduction of a fee-paying principle to the closed societies that, up to this point, have rejected the notion of freedom and democracy.

Under a limited-access, fee-paying principle, open societies would still be able to enjoy the educational benefits of OE, while closed societies would have to pay for access. The previous sections have attempted to outline a case justifying the partial exclusion of closed China from the benefits of OE, while alluding to the market demand for Western educational access. Thus, a reasonable case can be made that with such high demand for quality education in developing China, a modest fee-paying principle wouldn't necessarily discourage Chinese consumption. Ensuring consumption despite a fee-paying principle would require that OE reach its maximum potential and provide a needed educational product. In doing so, the question of OER sustainability would be answered by the revenue generated of fee-paying closed societies. This essay considers China as a primary example of a closed, yet developing society which requires access to higher quality education for development needs, yet certainly there are several other nation-states which have a similar context.

Finally, this proposal would not be an indefinite form of punishment for societies whose political and social development has not reached a modern stage. In terms of political capital, the implementation of a fee-paying principle to closed societies may potentially serve as a catalyst for reform, as the final section will briefly consider.

## 6 Conclusion: Open Education as Political Tool for Initiating Reform

Intellectual discourse on the development of OER and its role in modern society have routinely highlighted OER as a socially produced intellectual product of modern, open, liberal democratic societies. Although

academia would like to apply the OE concept as part of some worldwide dream of equal access and opportunity for education, few have taken into account the reality that their vision would include granting OE access to political entities whose ideologies run counter to their notion of openness. Thus far, this essay has attempted to justify an initiative to make OE distribution a limited-access educational product for nation-states exhibiting non-open qualities. By initiating a fee-paying principle for non-compliant states, policymakers may temporarily fix the sustainability conundrum.

In the case of China, since the communist states neo-liberal reform in the late 1970s, Western democratic leaders have defended integration with the authoritarian state on the grounds that neo-liberal economic reform and consumer culture would democratize the communist country. To date, the CCP has been able to maintain substantial social control despite the capitalist reforms. Additionally, China's economic integration and subsequent rise to world prominence has sudden given the country considerable political influence, giving the CCP leverage and further discouraging democratic reform. Besides the typical human rights, intellectual property, and censorship talking points in Sino-Western diplomatic discussions, the West now finds itself in an uphill climb against trade deficits and currency manipulation.

However, the West still maintains a competitive advantage in quality education, as evidenced by the enormous numbers of Chinese students seeking to attend Western universities. I suggest that the implementation of a limited-access, fee-paying principle of OE in China may give Western states some leverage in reaching political and economic compromises with the CCP. By providing high quality, high demand OER, the West may have an additional tool in leveraging currency revaluation or greater market access inside China in exchange for lowering OE access costs. Additionally, the possibility of OE as a political tool may also entice financial support for OE from Western government institutions which might otherwise be disinclined to provide support to an educational movement without clear, measurable outcomes. Granted, this view may be more of a philosophical thought and lack the necessary academic development for formal consideration, hopefully it inspires further intellectual inquire and develops another perspective from which to examine open education.

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